**KEY INDICATORS 2019**

**PRODUCTION**
- 540,986 ha organic agricultural land (15.7%)
  - 0.35% of EU agricultural land
- 4,694 organic producers on average farms of 115.3 ha
- 87,717 ha (3.5%)
- 5,654 ha (15.2%)
- 441,044 ha (46.7%)

**MARKET**
- €204 million retail sales
  - €20 per capita
- 825 organic processors

**2030 SCENARIOS FOR CAP EXPENDITURE**

<table>
<thead>
<tr>
<th>Scenario</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>Organic area (kha)</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>15.7%</td>
<td>2.9%</td>
<td>541</td>
<td>527</td>
</tr>
<tr>
<td>LINEAR⁴</td>
<td>20.9%</td>
<td>3.0%</td>
<td>721</td>
<td>702</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>25.0%</td>
<td>5.4%</td>
<td>864</td>
<td>841</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>29.5%</td>
<td>8.1%</td>
<td>1020</td>
<td>993</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 97.3% certified area at 105 €/ha/year average. Based on these scenarios, a 25% by 2030 target could be achievable, but would require a doubling of current expenditure. If achieved, this would contribute 0.55% to the EU target of 25% by 2030.

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1 Share of national total for category
2 CAP support for organic conversion and maintenance, including national co-financing
3 These values are further explained in the technical note that is available on www.organicseurope.bio
4 Linear trend growth continuing on 2014-2019 basis
5 Target proposed by independent researcher, national official target 22% by 2027 and 25% by 2030
6 Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
<th>Production</th>
<th>Retail sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>79-265</td>
<td>536-669</td>
<td>419-900</td>
<td>84</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>69-180</td>
<td>466-583</td>
<td>417-845</td>
<td>83</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>115-147%</td>
<td>115%</td>
<td>100-107%</td>
<td>101%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Maintain or increase funding levels

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

Maintained, funded as Pillar 2 agri-environment-climate measures (AECMs).

Adequate compensation for permanent pastures as organic arable land requires manure produced by animals on pastures. Arable land and vegetable production should be compensated 100%. Focus on investments in organic farmers and their needs, especially young farmers. Make higher ambition of water protection areas part of strategic plan.

NATIONAL ORGANIC ACTION PLAN

- 2016-2020
- Targets by 2020:
  - 15% of national area
  - 3% of retail sales
- Progress towards achieving organic land target: On target
- Progress towards achieving retail sales target: Behind target
- New action plan 2021-2027 with 23% organic area, 4% retail sales and 5% organic food in public catering by 2027
- 25% organic area by 2030

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

- Combinations with many agri-environment options possible, also specific requirements
- Organic applications prioritised for some schemes

Support investments, market development & promotion

- No specific support focused on organic farming

Support for advice, training, innovation & research

- Maintain/develop combinations/specific options for organic farms to benefit from synergies
- Maintain/develop support options to promote organic market development
- Maintain/develop support options to promote knowledge and innovation

LEGEND

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