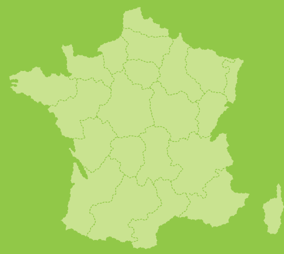
## PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

# FRANCE



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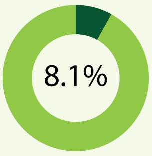
## KEY INDICATORS 2019

### PRODUCTION




2,240,797 ha
organic agricultural land
1.43% of EU agricultural land

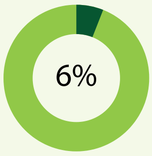
47,196 organic producers on average farms of 47.5 ha

1,255,369 ha (6.9%) [1]

167,041 ha (17.5%) [1]

818,387 ha (9.5%) [1]

### MARKET




€11,295 million retail sales
€173 per capita

19,311 organic processors

### CAP SUPPORT (2018) [2]

1,040,370 ha supported
51.1% of certified area
at average of 173 €/ha/year

180 M€/year expenditure

## 2030 SCENARIOS FOR CAP EXPENDITURE [2] & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|---|---|---|---|---|---|---|---|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% [3] | If 100% certified area supported [3] |
| **2014-2019** | 8.1% | 20.1% | 2,241 | 1,146 | 198 | 248 | 485 |
| **LINEAR** [4] | 17.0% | 10.1% | 4,735 | 2,421 | 419 | 523 | 1,024 |
| **POTENTIAL** [5] | 25.0% | 19.1% | 6,954 | 3,555 | 615 | 769 | 1,504 |
| **ENHANCED** [6] | 29.5% | 24.2% | 8,212 | 4,198 | 726 | 908 | 1,776 |

In 2018, conversion/maintenance support was paid on 51.1% certified area at 173 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require 3.5-7.5 times current expenditure. If achieved, this would contribute 4.44% to the EU target of 25% by 2030.

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 national organic movement, national official target 18% by 2027
6 Enhanced target needed to reach EU 25% target

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## CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

### CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| | Annual crops | Horticulture crops | Permanent crops | Grassland | ACTIONS NEEDED |
|---|---|---|---|---|---|
| CONVERSION | 300 | 350-900 | 350-900 | 130 | Maintain or increase funding levels |
| MAINTENANCE | 0 | 0 | 0 | 0 | Restart to support provision of public goods |
| CONVERSION AS % OF MAINTENANCE | - | - | - | - | Review payment limits per holding |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | Greatly reduced, funded as Pillar 1 eco-schemes. Some support provided by water agencies. | | | | Review to prevent decline in organic sector |

Support environmental benefits of organic farming within eco-schemes. Ensure that eco-schemes' payment is proportionate to the environmental benefits, thus greater payment level for organic farming. Align the French objective with the EU target of 25% organic land by 2030.

### NATIONAL ORGANIC ACTION PLAN

- 2017-2022
- Targets by 2022:
  - 15% of national area
  - 22% of public procurement
  - Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

| OTHER POLICY SUPPORT | Current context | Action needed |
|---|---|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations with many agri-environment options possible, some double-funding restrictions | Improve/develop combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Organic applications prioritised for some schemes | Maintain/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Organic knowledge centres in some regions, training and research funded | Maintain/develop support options to promote knowledge and innovation |

### LEGEND

Annual crops · Horticulture crops · Permanent crops · Grassland · Production · Public procurement

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# TECHNICAL NOTES

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## KEY INDICATORS 2019

### PRODUCTION AND MARKET

- The organic land area, the retail sales value (total and per capita) and operators number data (producers and processors) for 2019 are from FiBL data sets available on https://statistics.fibl.org/europe.html. These data are consistent in most cases with Eurostat data, with some exceptions (e.g. Germany);
- The breakdown by organic land use category (arable land, permanent crops, grassland) is from FiBL: https://statistics.fibl.org/visualisation/crops.html;
- The total agricultural land area (UAA) and breakdown by main land use type data for the % share calculations are from Eurostat https://ec.europa.eu/eurostat/data/database, but relate to 2016, the latest year for which data are currently available.

### CAP SUPPORT

- The total support expenditure, share of certified area supported and average support per hectare values for each country and the EU-27 are 2018 data from a not yet published report compiled by the Thünen Institute.[1]

## 2030 SCENARIOS FOR CAP EXPENDITURE[2] & ORGANIC AREA

### THE COLUMNS

- National organic area share: This is the share of national agricultural area (Utilised Agricultural Area or UAA) farmed under organic principles. Values are actual for 2019 and estimations for 2030, determined as indicated below for each scenario;
- Annual average growth rates are calculated on the basis of the start and end values for each period, in the historic case 2014 and 2019, in subsequent scenarios 2019 and 2030. These values assume a constant growth percentage each year, although it is likely that over time these growth rates will diminish as the sectors grow larger.
- The linear trend values are estimated using linear regression analysis of the data for all years from 2014 to 2019, not only the start and end values, to forecast the outcome in 2030.
- Organic area (kha):
  - Certified: Initial 2019 data increased as appropriate for each scenario
  - Supported by the CAP: assuming same share of certified area receiving organic conversion and maintenance support as in 2018.[1]
- CAP expenditure (million EUR):
  - Total annual expenditure (million EUR, 2018 average rates): Based on 2018 average payment per hectare data from Thünen Institute report,[1] multiplied by area supported. Values include both EU and national co-financing.
  - 2018 rates +25%: Expenditure if 25% increase in payment rates (million EUR): Assumes that the 2018 average payment per hectare are increased by 25%.
  - If 100% certified area supported: Assumes that the 2018 +25% average payment per hectare is applied to all certified area. In some countries unsupported land is permanent grassland where a lower rate of payment might be expected, so these values represent top end of range.

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### THE FOUR ROWS

- 2014-2019: it is the historic growth based on actual area data up to 2019, with 2019 expenditure estimated based on 2018 values (see Key indicators above).
- Linear trend: assumes that the growth from 2019 to 2030 will keep the same growth rate calculated using linear regression analysis as achieved in 2014-2019.
- Feasible: These scenarios are proposed on the basis of either:
  - Official targets in national action plans or CAP strategic plans,
  - Organic sector preferred targets as communicated by IFOAM Organics Europe's members,
  - Value suggested by the consultant on basis of current situation and scenario results.
  - The origin of the targets varies from country to country, and it is explained in the footnotes.
- Enhanced: the organic land growth share needed to deliver the 25% EU target are based on pro rata increases to the Feasible growth values.

### IN THE TEXT

The percentage points contribution to the EU target refers to the share of EU UAA that would be achieved, so a 1 percentage point contribution to the 25% target is 1% of EU UAA, not 1% of the target.

## CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

### CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

- Conversion & Maintenance: Data on organic conversion and maintenance payment rates for different land use types are for 2019 (reflecting the 2015-2020 rural development programmes) and sourced from the Thünen Institute report.[1] Payment ranges reflect crop type, area and regional variations – full details are available in the report.
- Conversion as % of maintenance: this is the percentage value of conversion payments compared to maintenance payments, directly calculated from the two values above. Given payments are calculated on an income foregone basis, and conversion normally entails additional investment and restructuring costs, as well as lack of access to organic premium prices, conversion payments might be expected to be substantially higher than maintenance payments, at least for the first 2-3 years until full organic status is achieved.
- Plans for CAP 2021-2027 organic support to be…: Information on future CAP plans reflect responses to IFOAM Organic Europe's survey (April-May 2021) of its national member organisations.

### NATIONAL ORGANIC ACTION PLAN

- Data on current national action plans is obtained from the Thünen Institute report.[1]
- Information on future action plans reflect responses to IFOAM Organics Europe's 2021 survey of member organisations.

### OTHER POLICY SUPPORT

- Assessments of other support policies (Current context and Actions needed) reflect the judgement of the consultant based on the Thünen Institute report. [1]
- Information was integrated and validated by IFOAM Organics Europe's Council members.

1 Lampkin N and Sanders S (2021 in press) Organic support payments in the European Union. Thünen Working Paper. Braunschweig: Thünen Institute.
2 CAP support for organic conversion and maintenance, including national co-financing.

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