PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS
GREECE

KEY INDICATORS 2019

PRODUCTION
- 528,752 ha organic agricultural land (11.6%)
- 30,124 organic producers on average farms of 17.6 ha
- 179,003 ha (10.2%) of certified area
- 70,200 ha (7.6%) of certified area
- 279,549 ha (15%) of certified area

MARKET
- €66 million retail sales
- 1,642 organic processors

CAP SUPPORT (2018)
- 248,000 ha supported
- 50.4% of certified area at average of 390 €/ha/year
- €97 M/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE & ORGANIC AREA

<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>Certified</td>
<td>Supported by the CAP</td>
<td>2018 rates</td>
<td>2018 rates</td>
</tr>
<tr>
<td>2014-2019</td>
<td>11.6%</td>
<td>9.1%</td>
<td>529</td>
<td>267</td>
</tr>
<tr>
<td>LINEAR^4</td>
<td>19.1%</td>
<td>5.9%</td>
<td>869</td>
<td>438</td>
</tr>
<tr>
<td>POTENTIAL^5</td>
<td>20.0%</td>
<td>6.6%</td>
<td>911</td>
<td>459</td>
</tr>
<tr>
<td>ENHANCED^6</td>
<td>23.6%</td>
<td>9.4%</td>
<td>1,076</td>
<td>542</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 50.4% certified area at 390 €/ha/year average. Based on these scenarios, a 20% by 2030 target is realistic and achievable, but would require 2-4.5 times current expenditure. If achieved, this would contribute 0.58% 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 independent researcher
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>
</tr>
</thead>
<tbody>
<tr>
<td>CONVERSION</td>
<td>72-550</td>
<td>550</td>
<td>299-850</td>
<td>211-333</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td>70-594</td>
<td>550</td>
<td>225-850</td>
<td>260-383</td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>80-90%</td>
</tr>
</tbody>
</table>

ACTIONS NEEDED
- Ensure conversion costs fully recognised
- Maintain or increase funding levels
- Increase % of certified area supported

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...
- No information.

NATIONAL ORGANIC ACTION PLAN
- No current or recent action plan
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMBINATION WITH OTHER AGRI-ENVI MEASURES</td>
<td>Improve/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LEGEND
- Annual crops
- Horticulture crops
- Permanent crops
- Grassland