### Key Indicators 2019

#### Production
- 73,952 ha organic agricultural land (1.5% of EU agricultural land)
- 1,725 organic producers on average farms of 42.9 ha
- 4,319 ha (0.9%) ¹
- 64 ha (3.8%) ¹
- 69,323 ha (1.6%) ¹

#### Market
- €206 million retail sales
- €43 per capita
- 26 organic processors

#### CAP Support (2018) ²
- 72,000 ha supported
- 97.3% of certified area at average of 111 €/ha/year
- 8 M€/year expenditure

### 2030 Scenarios for CAP Expenditure ² & 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 + 25%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2018 Rates</td>
<td>If 100% Certified Area Supported at EU 2018 Rate</td>
</tr>
<tr>
<td>2014-2019</td>
<td>1.5%</td>
<td>8.5%</td>
<td>74</td>
<td>72</td>
</tr>
<tr>
<td>Linear</td>
<td>2.3%</td>
<td>4.9%</td>
<td>114</td>
<td>111</td>
</tr>
<tr>
<td>Potential</td>
<td>12.0%</td>
<td>63.0%</td>
<td>586</td>
<td>570</td>
</tr>
<tr>
<td>Enhanced</td>
<td>14.2%</td>
<td>76.0%</td>
<td>692</td>
<td>673</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 97.3% certified area at 111 €/ha/year average. Based on these scenarios, a 12% by 2030 target is challenging, and would require 10 times current expenditure. If achieved, this would contribute 0.37% 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 7.5% by 2027
6 Current payment rates are almost 50% below EU average. CAP expenditure based on EU average
7 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>Conversion</th>
<th>60-260</th>
<th>60-300</th>
<th>60-300</th>
<th>60-220</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAINTENANCE</td>
<td>30-170</td>
<td>30-200</td>
<td>30-200</td>
<td>30-170</td>
</tr>
<tr>
<td>CONVERSION AS % OF MAINTENANCE</td>
<td>150-200%</td>
<td>150-200%</td>
<td>150-200%</td>
<td>130-200%</td>
</tr>
</tbody>
</table>

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

Proposed to maintain and enhance organic farming support under Pillar 2, but no budget allocated to date.

Budget aligned to national area target

Organic farms should have priority access to agri-environment and eco-schemes to support environmental and climate objectives that go beyond the scope of the organic regulations. CAP funds should be adequately deployed to support organic specific advice and training, infrastructural investments and market development and promotion.

NATIONAL ORGANIC ACTION PLAN

- 2019-2025
- Targets by 2025:
  - Increase of national area
  - Increased organic market
  - Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</td>
<td>Capital investment scheme and some national funding for processing investment and market development</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</td>
<td>Limited provision of funded advice and training</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

LEGEND

Annual crops | Horticulture crops | Permanent crops | Grassland | Production | Organic market