PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

SLOVENIA

#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION
- 49,638 ha organic agricultural land (10.2%)
  0.03% of EU agricultural land
- 3,823 organic producers on average farms of 13 ha
- 6,521 ha (3.7%) ¹
- 3,089 ha (11.5%) ¹
- 40,028 ha (14%) ¹

MARKET
- €48 million retail sales
- €26 per capita
- 142 organic processors

CAP SUPPORT (2018) ²
- 46,000 ha supported
- 95.7% of certified area at average of 210 €/ha/year
- 10 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE ² & ORGANIC AREA

<table>
<thead>
<tr>
<th></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>Supported by the CAP</td>
<td>2018 rates</td>
</tr>
<tr>
<td>2014-2019</td>
<td>10.2%</td>
<td>4.1%</td>
<td>50</td>
<td>48</td>
</tr>
<tr>
<td>LINEAR ⁴</td>
<td>14.1%</td>
<td>3.5%</td>
<td>69</td>
<td>66</td>
</tr>
<tr>
<td>POTENTIAL ⁵</td>
<td>15.0%</td>
<td>4.3%</td>
<td>73</td>
<td>70</td>
</tr>
<tr>
<td>ENHANCED ⁶</td>
<td>17.7%</td>
<td>6.8%</td>
<td>87</td>
<td>83</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 95.7% certified area at 210 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, requiring up to 2 times current expenditure. If achieved, this would contribute 0.05% 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

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IFC/AM ORGANICSEUROPE
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>312</td>
<td>600-800</td>
<td>291-900</td>
<td>378</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance</td>
<td>326</td>
<td>600</td>
<td>189-900</td>
<td>156</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

CONVERSION AS % OF MAINTENANCE
- 96%
- 100-133%
- 100-155%
- 242%

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

NATIONAL ORGANIC ACTION PLAN

- 2007-2015
- Targets by 2015:
  - 20% of national area
  - 10% of retail sales
  - Progress towards achieving targets: Target missed
- No current action plan
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>HOW</th>
<th>CURRENT CONTEXT</th>
<th>ACTION NEEDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comb</td>
<td>Combinations with most agri-environment options possible</td>
<td>Maintain/develop combinations/specific options for organic farms to benefit from synergies</td>
</tr>
<tr>
<td>Supi</td>
<td>Organic projects prioritised</td>
<td>Maintain/develop support options to promote organic market development</td>
</tr>
<tr>
<td>Supad</td>
<td>Special provisions for organic projects, compulsory training for organic support applicants</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
</tr>
</tbody>
</table>

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