PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS
SPAIN

#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION

- 2,354,915 ha organic agricultural land (10.1%)
- 41,838 organic producers on average farms of 56.3 ha
- 494,213 ha (4.3%)¹
- 606,406 ha (14.6%)¹
- 1,254,296 ha (16.5%)¹

MARKET

- €2,133 million retail sales
- €46 per capita
- 5,230 organic processors

CAP SUPPORT (2018)²

- 1,045,000 ha supported
- 46.5% of certified area at average of 152 €/ha/year
- €159 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & 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></td>
<td></td>
<td>Certified</td>
<td>Supported by the CAP</td>
</tr>
<tr>
<td>2014-2019</td>
<td>10.1%</td>
<td>7.5%</td>
<td>2,355</td>
<td>1,095</td>
</tr>
<tr>
<td>LINEAR</td>
<td>15.7%</td>
<td>5.0%</td>
<td>3,652</td>
<td>1,699</td>
</tr>
<tr>
<td>POTENTIAL</td>
<td>25.0%</td>
<td>13.3%</td>
<td>5,807</td>
<td>2,701</td>
</tr>
<tr>
<td>ENHANCED</td>
<td>29.5%</td>
<td>17.4%</td>
<td>6,858</td>
<td>3,190</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 46.5% certified area at 152 €/ha/year average. Based on these scenarios, a 25% by 2030 target is achievable, but would require 3-6 times current expenditure. If achieved, this would contribute 3.71% 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 set by national government, national organic movement proposes 30% 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>Category</th>
<th>Current Context</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CONVERSION</strong></td>
<td></td>
<td>Ensure conversion costs fully recognised</td>
</tr>
<tr>
<td>81-894</td>
<td>128-2013</td>
<td>75-934</td>
</tr>
<tr>
<td>MAINTENANCE</td>
<td></td>
<td>Maintain or increase funding levels</td>
</tr>
<tr>
<td>30-853</td>
<td>41-1561</td>
<td>60-900</td>
</tr>
<tr>
<td><strong>CONVERSION AS % OF MAINTENANCE</strong></td>
<td>100-120%</td>
<td>100-120%</td>
</tr>
<tr>
<td><strong>MAINTENANCE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>41-450</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

No information.

CAP strategic plan should include a target for 30% organic land, a 10% organic market share and 20% organic public procurement to ensure involving the entire organic value chain.

### NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- Several regional action plans
- No specific future plans. Need for action plan with 2030 targets

### OTHER POLICY SUPPORT

#### COMBINATION WITH OTHER AGRI-ENVI MEASURES

Regional variations, details not reported

Improve/develop combinations specific options for organic farms to benefit from synergies

#### SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Regional variations, details not reported

Maintain/develop support options to promote knowledge and innovation

### LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland

Production & market data: Nic Lampkin

Policy & modelling: Nic Lampkin

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