



ACTION PLAN for the development of organic production



BIOEAST 15 June 2021, Diego Canga Fano, Principal Advisor



THE TARGET

GREEN DEAL - FARM TO FORK STRATEGY AND BIODIVERSITY STRATEGY:

- “At least 25% of the EU’s agricultural land under organic farming by 2030 and a significant increase in organic aquaculture”

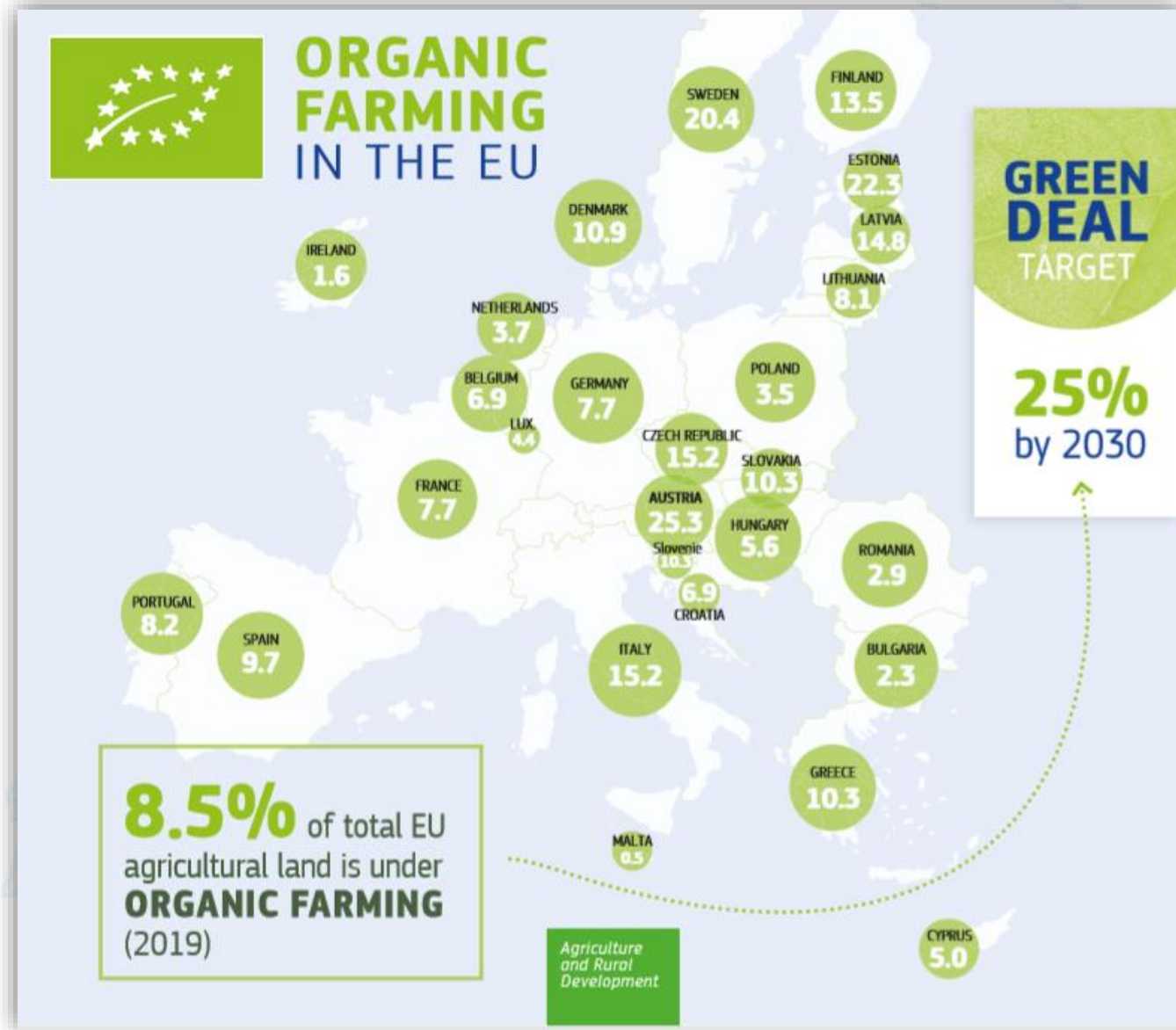
IMPORTANT:

- Organic farming has positive environmental, climate, biodiversity, animal welfare, etc. effects
- Multiplier effects: increases in organic farming have immediate positive impacts on other FtF/BDS targets (fertilisers, pesticides, antimicrobials)

AMBITIOUS:

- Up to 10% higher than what would be reached extrapolating current trends
- Very different starting points for Member States (organic farming accounting for 0.5%-over 25% of agricultural land)

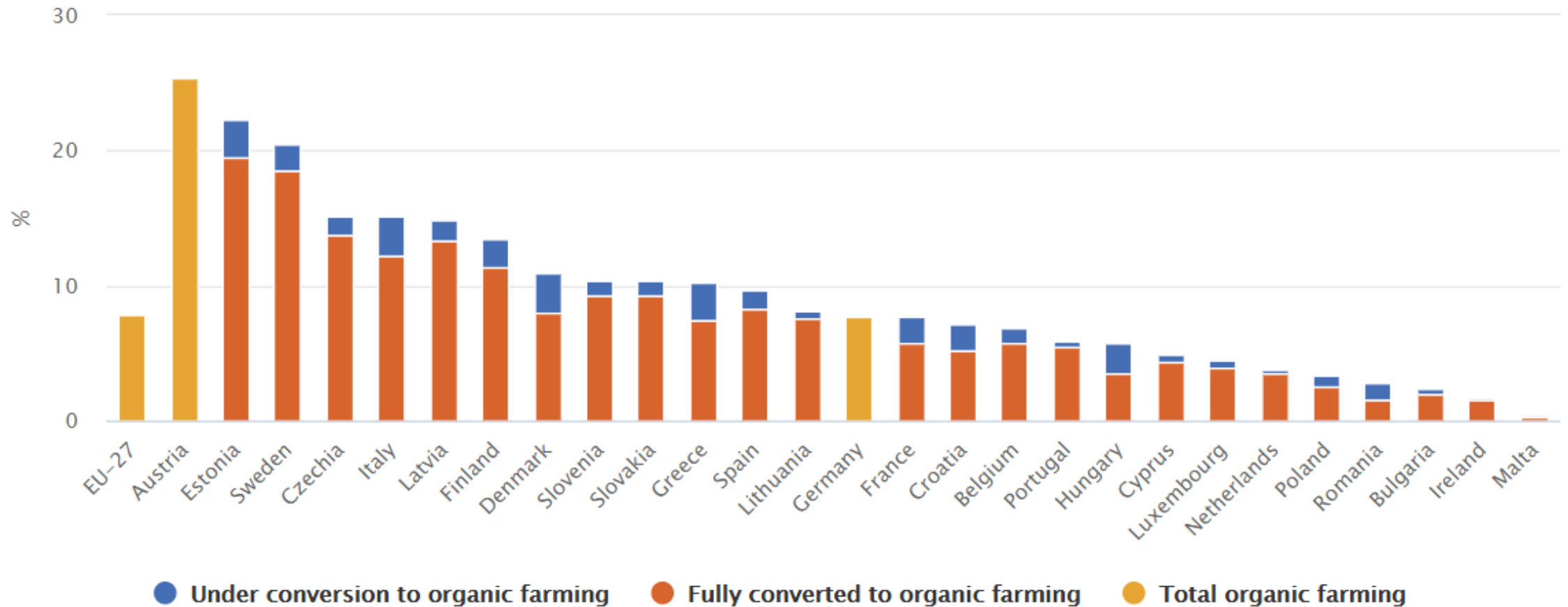
SHARE OF ORGANIC AREA IN TOTAL UTILISED AGRICULTURAL AREA (%), BY COUNTRY, 2019



SHARE OF ORGANIC AREA UNDER CONVERSION AND FULLY CONVERTED (%), BY COUNTRY, 2019

Share of organic area in total utilised agricultural area (UAA), by country, 2019

Source: Eurostat (online data codes: org_cropar and apro_cpsh1)



TOTAL ORGANIC AREA, BY COUNTRY, 2012 AND 2019

Total organic area (fully converted and under conversion), by country, 2012 and 2019

	Organic area (ha)		2012-19 (% change)
	2012	2019	
EU-27	9 457 886	13 793 665	45.8
Belgium	59 718	93 119	55.9
Bulgaria	39 138	117 779	200.9
Czechia	468 670	535 185	14.2
Denmark	194 706	285 526	46.6
Germany	959 832	1 290 839	34.5
Estonia	142 065	220 737	55.4
Ireland	52 793	73 952	40.1
Greece	462 618	528 752	14.3
Spain	1 756 548	2 354 916	34.1
France	1 030 881	2 240 797	117.4
Croatia	31 904	108 127	238.9
Italy	1 167 362	1 993 225	70.7
Cyprus	3 923	6 240	59.1
Latvia	195 658	289 796	48.1
Lithuania	156 539	242 118	54.7
Luxembourg	4 130	5 814	40.8
Hungary	130 607	303 190	132.1
Malta	37	55	48.6
Netherlands	48 038	68 068	41.7
Austria	533 230	671 703	26.0
Poland	655 499	507 637	-22.6
Portugal	200 833	293 213	46.0
Romania	288 261	395 228	37.1
Slovenia	35 101	49 638	41.4
Slovakia	164 360	197 565	20.2
Finland	197 751	306 484	55.0
Sweden	477 684	613 964	28.5
Iceland	:	5 740	:
Norway	55 260	45 312	-18.0
Switzerland	121 213	169 030	39.4
United Kingdom	590 011	459 275	-22.2
North Macedonia	:	3 711	:
Serbia	:	21 266	:
Turkey	:	551 718	:

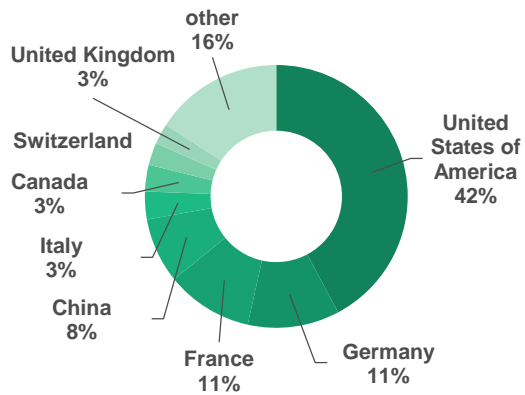
Note: (:) data not available

Source: Eurostat (online data code: org_cropar)

ORGANIC RETAIL SALES 2019

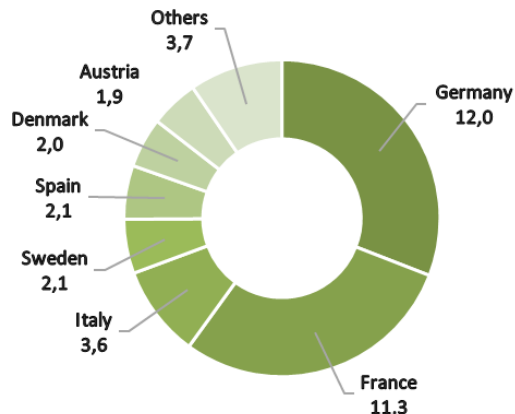
EU 27
41.1 billion €

The European Union (41.1 billion €) is the second **largest single market** after the US (44.7 billion) and followed by China (8.5 billion)



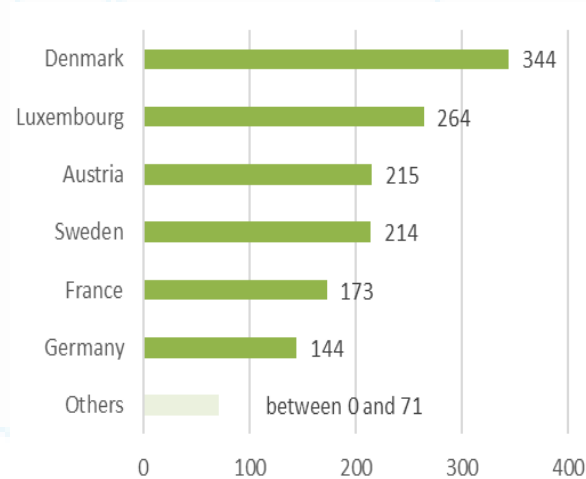
Distribution of retail sales value by country 2019

Germany
12.0 billion €



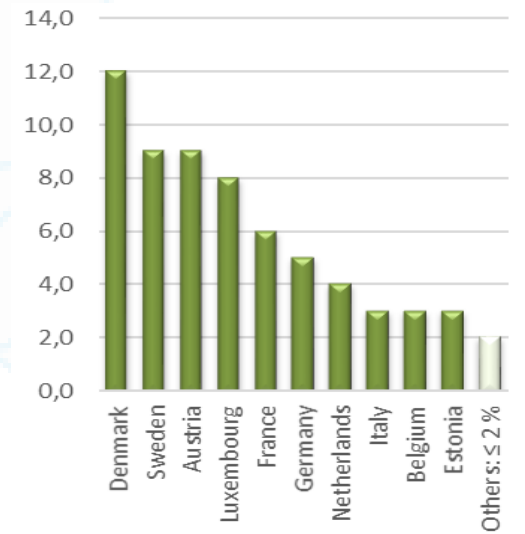
The EU MS with the largest markets for organic food 2019 [billion €]

344 €
are spent per person in Denmark
84 € as EU average



The EU MS with the highest per capita consumption of organic food 2019 [€/person]

12.1%
of the grocery in Denmark is organic



The EU MS with the highest Organic retail share [%]



THE ASSETS AND CHALLENGES

ASSETS:

- Legal stability, critical for farmers considering conversion (2018/848 entering into application 1/1/22)
- Substantial financial incentives (CAP, Horizon Europe, agricultural promotion policy)
- Public trust in organics
- Public recognition of the organic logo
- Commission analysis and proposed actions widely supported by stakeholders and the broader public (stakeholder consultation – 840 replies)

CHALLENGES:

- Different starting points Member States – No « one size fits all » approach
- Always present risk of fraud (consumer trust is everything in organics)



THE APPROACH (1)

- **Comprehensive** (consumption, production, sustainability)
- **Demand-driven** (consumption first, no conversion without growing demand)
- **Covering the complete value chain** (from farmers to restaurants)
- **Involving a wide range of stakeholders** (EU, Member States, private sector)
- **Mobilising the CAP** (among which agricultural promotion policy) **but also other programmes** (e.g. Horizon Europe,) **and tools** (e.g. Green Public Procurement)
- **Assigning prime importance to research and innovation** (30% of the budget for R&I on agriculture, forestry and rural areas for topics specific to/relevant for the organic sector)
- **Focused on better use of natural resources** (minimising the use of water, plastics, energy)



THE APPROACH (2)

CLEAR STRUCTURE

- 3 axes
- 23 actions

FOCUSED ON PLANNING AND IMPLEMENTATION IN ACCORDANCE WITH NATIONAL CIRCUMSTANCES – NOT PRESCRIPTIVE

- Organics in the CAP national strategic plans
- National organic action plans (covering measures beyond the CAP)

FOCUSED ON DELIVERY:

- Comprehensive monitoring system (progress reports, mid-term review)



AXIS 1:
ORGANIC FOOD AND PRODUCTS FOR ALL:
STIMULATE DEMAND AND ENSURE CONSUMER
TRUST



Promoting organic farming and the EU logo (1)

Action 1: Information and communication:

- **Give greater focus to organics in the information measures on the CAP**
 - **Collect data on - and inform about - the environmental, economic and social benefits of organic farming**
 - **Measure consumers' awareness of the EU organic logo through Eurobarometer surveys**
 - **Identify events to inform about organics, in particular in Member States where demand is below the average EU level**
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Promoting organic farming and the EU logo (2)

Action 2: Promotion:

- **Allocate a larger share of the budget of the agricultural promotion policy to raising the consumer awareness of - and stimulating the demand for - organic products**
 - **Step up the promotion of EU organic products in targeted third country growth markets**
 - **Raise awareness of export opportunities for EU organic producers**
 - **Stimulate the sector's visibility through awards**
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Promoting organic canteens

and increasing the use of green public procurement

Action 3: Stimulate a greater uptake of organics in public canteens:

- **Boost awareness of the criteria for Green Public Procurement (GPP) issued in 2019**
- **Integrate organic products into the minimum mandatory criteria for sustainable food public procurement to be developed as part of the legislative framework for sustainable food systems**
- **Analyse and monitor the application of EU GPP, and invite Member States to fix ambitious national targets for organics in GPP**
- **Prepare events for public administrations in charge of public catering to raise awareness of EU GPP**



Reinforcing organic school schemes

Action 4: Review the EU school scheme framework in accordance with the Farm to Fork strategy and the beating cancer plan:

- **Engage with Member States to identify ways to increase further the distribution of organic products in the school schemes**
 - **Carry out a study on real price of food, including the role of taxation, with a view to developing recommendations**
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Preventing food fraud and strengthening consumer trust

Action 5: Strengthen the fight against fraudulent practices:

- **Robust supervision of control systems in Member States and third countries**
- **Fraud prevention policies, and cooperation with the EU Food Fraud Network and Europol and with competent authorities and law enforcement bodies in third countries**
- **Guidance on reinforced imports control at the border**
- **Stronger measures to tackle fraudulent practices through the sanctions catalogues**
- **Measures to inform consumers and/or to recall from the market products where fraud is identified**
- **Early warning systems, using artificial intelligence for data mining in EU and Member State databases**



Improving traceability

Action 6: Improve traceability:

- **Develop a database of certificates of all EU operators, and later also relevant third country operators, building on earlier work**
- **Promote the enrolment of competent authorities and ensure that control bodies sign certificates of inspection in TRACES digitally**
- **Coordinate regular traceability exercises on organic products in cooperation with Member States, their control bodies and third countries**

Action 7: Improve traceability:

- **Assess to what extent the traceability of organic products could benefit from blockchain or other digital technologies and envisage pilot projects**



The contribution of the private sector

Action 8: Reinforce the role of retailers, wholesalers, catering services, restaurants and other businesses:

- **Aim at obtaining clear commitments from relevant stakeholders to support and increase the distribution and sale of organic products, in the context of the Farm to Fork strategy's code of conduct for responsible business and marketing practices, and disseminate best practices in relevant platforms like the Circular Economy Stakeholder Platform**
- **Establish partnerships with businesses willing to promote the use of organic products as part of their corporate sustainability policy**



**AXIS 2:
ON THE WAY TO 2030: STIMULATING CONVERSION
AND REINFORCING THE ENTIRE VALUE CHAIN**



Encouraging conversion, investment and exchange of best practices (1)

Action 9: In the framework of the new CAP and CFP:

- **Ensure Member States make the best use of the possibilities offered by the new CAP to support their national organic sector:**
 - **The full use of relevant CAP instruments such as eco-schemes and rural development environmental management commitments**
 - **The strengthening of farm advisory services, notably as part of Agricultural Knowledge and Innovation System (AKIS)**
- **Promote the exchange of best practices at EU and national level on education and training (curricula, courses, materials)**



Encouraging conversion, investment and exchange of best practices (2)

- **Set up EU demonstration farm networks on specific topics to promote a participatory approach (dissemination)**
 - **Promote best practices and synergies with the EIP-AGRI projects via the future CAP network**
 - **Encourage Member States to include the increase of organic aquaculture in their reviewed Multi-annual National Strategic plans for aquaculture, and to make the best use of possibilities offered by the European Maritime Fisheries and Aquaculture Fund (EMFAF) 2021-2027**
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Developing sector analysis to increase market transparency

Action 10: Provide a comprehensive overview of the sector:

- **Publish regular reports on organic production in the EU**
- **Publish a yearly report on imports of organic products from third countries**

Action 11: Developing sector analysis:

- **Intensify the collection of market data in collaboration with Member States and extend the EU Market Observatories' analysis to organic products**



Supporting the organization of the food chain (1)

Action 12: Supporting the organization of the food chain:

- **Carry out an analysis of the degree of organisation in organic sector supply chains**
- **Identify ways to improve it in consultation with producer organisation representatives and other concerned stakeholders**
- **Investigate the legal possibility of forming or joining specific organic producer organisations and, where possible, encourage Member States to allocate funds for this purpose**
- **If there is sufficient evidence that unfair trading practices penalising organic producers occur, the Commission shall address them by using all the tools at its disposal**



Supporting the organization of the food chain (2)

Action 13: Supporting the organization of the food chain:

- **Raise awareness and provide better information about ‘group certification’, allowing small holding farmers to share the cost and administrative burden of certification, in line with Regulation 2018/848 on organic production**
 - **Group certification means that a group of farmers joins forces to obtain one certificate for the entire group, instead of each farmstead applying for individual certification**



Reinforcing local and small-volume processing and fostering short trade circuits

Action 14: Reinforcing local and small-volume processing and fostering short trade circuits:

- **Engage with Member States and stakeholders to foster local and small-scale processing**
- **Encourage Member States to support the development and the implementation of 'Bio districts'**

Action 15: As organic farming can enhance social inclusion in rural areas while promoting decent working and living conditions:

- **Assist Member States in designing measures for organic farming in rural areas that promote gender equality and youth farmers/employment**



Improving animal nutrition in accordance with organic rules

Action 16: Improving animal nutrition:

- **Support research and innovation under Horizon Europe on alternative sources of organic vitamins and other substances that might turn out to be necessary, and on alternative sources of protein keeping in mind their technical and economic feasibility**
- **Explore means to support the application for feed additives produced without genetically modified micro-organisms (GMM), feed based on insects as well as marine feed stocks**
- **Adopt an algae initiative to support EU algae production and support the EU algae industry to ensure the supply of algae as alternative feed material for organic animal farming**



Reinforcing organic aquaculture

Action 17: Reinforcing organic aquaculture:

- **Support research and innovation on alternative sources of nutrients, breeding and animal welfare in aquaculture; the promotion of investments on adapted polyculture and multi-trophic aquaculture systems; and the promotion of hatcheries and nurseries activities for organic juveniles**
- **Identify and address as appropriate any specific obstacles to the growth of EU organic aquaculture**



**AXIS 3:
ORGANICS LEADING BY EXAMPLE: IMPROVING THE
CONTRIBUTION OF ORGANIC FARMING TO
SUSTAINABILITY**



Reducing climate and environmental footprint

Action 18: Reducing climate and environmental footprint:

- **Take steps to set up a pilot network of climate positive organic holdings to share best practices**
 - **A proposed mission in the area of Soil Health and Food could contribute to the pilot network in particular through the deployment of living labs and lighthouses and other activities supporting carbon farming**
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Enhancing genetic biodiversity and increasing yields

Action 19: Enhance biodiversity and increase yields:

- **Earmark funding under Horizon Europe to support the preservation and use of genetic resources, pre-breeding and breeding activities, and the availability of organic seeds, and to contribute to the development of organic heterogeneous plant reproductive material and plant varieties suitable for organic production**
- **Set up EU demonstration farms networks**
- **Strengthen farm advisory services**
- **Support research and innovation on improving organic yields**



Alternatives to contentious inputs and other plant protection products

Action 20: Alternatives to contentious inputs and other plant protection products:

- **Earmark funding under Horizon Europe for research and innovation projects on alternative approaches to contentious inputs, paying particular attention to copper and other substances as assessed by the European Food Safety Authority**
- **Foster where appropriate the use of alternative plant protection products, such as those containing biological active substances**



Enhancing animal welfare

Action 21: In the context of the Animal Welfare Platform:

- **Continue working with Member States and civil society to find concrete and operational ways to further improve animal welfare in organic production**





Making more efficient use of resources

Action 22: Making more efficient use of resources:

- **Adopt a Framework on bio-based, compostable and biodegradable plastic , which will include principles and criteria under which the use of sustainable bio-based materials that are easily bio-degradable in natural conditions is beneficial to the environment**

Action 23: Making more efficient use of resources:

- **Promote the more efficient and sustainable use of water, the increased use of renewable energy and clean transport, and the reduction of nutrient release**



Thank you

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