

The background of the cover is a vibrant green color, overlaid with a repeating pattern of small, light-green icons representing various organic products. These icons include fruits like apples, grapes, strawberries, and carrots; vegetables like peas, mushrooms, and leafy greens; and animal products like chickens, cows, pigs, and fish. The icons are arranged in a grid-like fashion, creating a textured, thematic background.

ORGANIC IN EUROPE

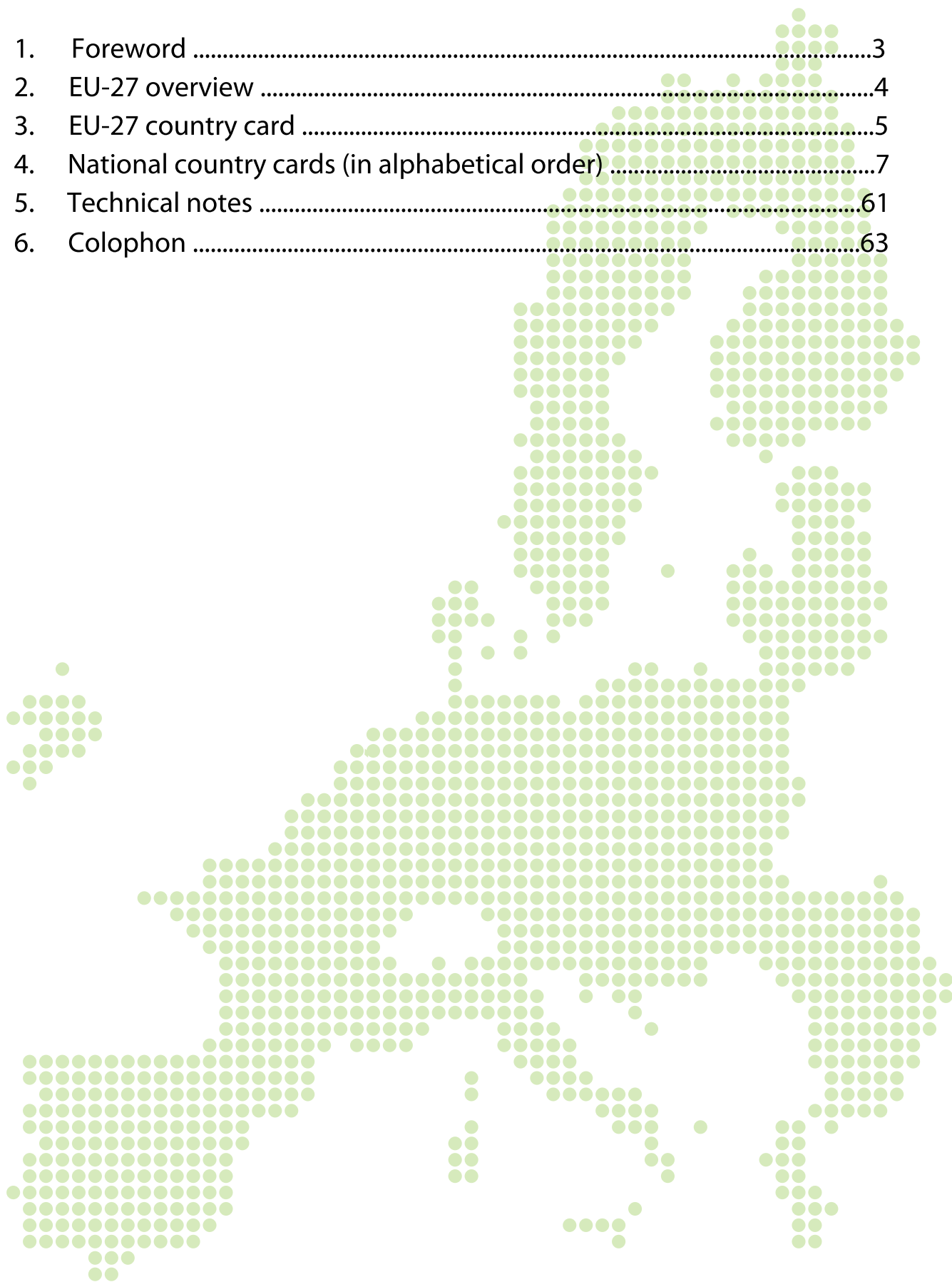
.....
PROSPECTS & DEVELOPMENTS
FOR ORGANIC IN NATIONAL
CAP STRATEGIC PLANS
.....



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..... #ORGANICINEUROPE

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PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS FOREWORD



..... #ORGANICINEUROPE

'Organic in Europe - Prospects and developments for organic in national CAP Strategic Plans' highlights how much of the national CAP budgets will need to be dedicated to organic farming in all Member States to reach the EU Farm to Fork and Biodiversity Strategies' average target of 25% organic land by 2030.

IFOAM Organics Europe presented this study at its General Assembly on 29 June 2021. The study visualises the efforts every country needs to put into place to reach their potential national targets, which should fairly contribute to the EU average 25% target.

In 2019, Europe had an organic land area of 9%, with average payments rates of €213.15/hectare. Only 64% of the certified organic area is currently receiving organic support payments, amounting to almost €2 billion of CAP support/year (Note: Average payment rate, percentage of certified area supported, and total spend are 2018 data).

Achieving 25% organic land in the EU by 2030 would require the EU to:

- Triple its organic land area between 2019 and 2030;
- Increase its overall CAP expenditure 3-5-fold by 2030;
- Dedicate 9-15% of the CAP budget to organic (instead of 3% as in 2018).

Achieving 25% organic land in the EU by 2030 would require Member States to:

- Increase payment rates per hectare before 2030 – to consider increases in costs since payments rates were last set in 2014;
- Some individual countries with low levels of support for organic farming would need to consider a 5-10-fold increase in expenditure to deliver realistic targets for their national organic land area.

According to IFOAM Organics Europe, Member States should introduce a national target for organic land in their CAP Strategic Plan, based on an analysis of the organic sector's production needs, and of its contribution to the CAP, EU Green Deal, Farm to Fork and Biodiversity strategies' objectives. The Commission should ensure that all CAP Strategic Plans include a target for organic land representing a fair contribution to the EU's 25% target. Countries have different baselines and should have different targets, and Member States with already more than 25% organic land should also continue to develop organic farming. This is in line with the EU Organic Action Plan's call for all Member States to set a target and national strategic plan for developing their organic sectors.

The document is commissioned from an independent researcher and provides readers with an overview for the EU and each Member State. On 27, and an EU country card, the following information is available:

- Key indicators of production, market, and CAP support;
- Scenarios for CAP expenditure and their effect on the 2030 organic area;
- An overview of the current CAP support payments;
- Information about a national organic action plan; and
- Other policy support measures impacting the organic land area.

'Prospects & developments for organic in national CAP Strategic Plans' and individual country cards are available on <https://www.organicseurope.bio/library>.

PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS EU-27 OVERVIEW



#ORGANICINEUROPE



Below table provides you with an overview of the prospects and developments for organic in national CAP Strategic Plans for the European Union as well as each Member State. On the left, you can find the current share of organic land, followed by the current (2018) CAP support. The numbers in columns 'Corresponding CAP expenditure' refer to the minimum (least ambitious) and maximum (most ambitious) amounts a country could allocate to achieving the national/organic movement and enhanced scenarios detailed on the following country cards.

| | Organic area share | Current (2018) CAP support (M€/year) | Potential organic area share | Corresponding CAP expenditure (M€/year) | Enhanced organic area share | Corresponding CAP expenditure (M€/year) |
|-----------------------|--------------------|--------------------------------------|------------------------------|---|-----------------------------|---|
| EU-27 | 9.0% | 1,803 | 21.1% | 4,405/8,817 | 25.0% | 5,193/10,394 |
| AUSTRIA | 25.1% | 121 | 40% | 202/313 | 47.2% | 238/369 |
| BELGIUM | 6.9% | 19 | 20.0% | 59/82 | 23.6% | 69/97 |
| BULGARIA | 2.6% | 24 | 10.0% | 84/199 | 11.8% | 100/235 |
| CROATIA | 6.9% | 33 | 15.0% | 75/103 | 17.7% | 89/121 |
| CYPRUS | 5.6% | 4 | 10.0% | 6.9/11.3 | 11.8% | 8.1/13.3 |
| CZECH REPUBLIC | 15.7% | 53 | 25.0% | 88/113 | 29.5% | 104/133 |
| DENMARK | 10.9% | 41 | 25.0% | 104/150 | 29.5% | 123/178 |
| ESTONIA | 22.2% | 18 | 30.0% | 27/39 | 35.4% | 31/46 |
| FINLAND | 14.0% | 56 | 25.0% | 104/141 | 29.5% | 122/166 |
| FRANCE | 8.1% | 180 | 25.0% | 615/1,504 | 29.5% | 726/1,776 |
| GERMANY | 9.7% | 300 | 20.0% | 704/1,091 | 23.6% | 831/1,288 |
| GREECE | 11.6% | 97 | 20.0% | 179/444 | 23.6% | 212/525 |
| HUNGARY | 6.5% | 21 | 15.0% | 72/163 | 17.7% | 85/192 |
| IRELAND | 1.5% | 8 | 12.0% | 63/81 | 14.2% | 75/96 |
| ITALY | 15.8% | 386 | 35.0% | 870/1,938 | 41.3% | 1,027/2,289 |
| LATVIA | 15.0% | 28 | 25.0% | 48/64.5 | 29.5% | 56.7/76.1 |
| LITHUANIA | 8.3% | 36 | 15.0% | 66/108 | 17.7% | 78/127 |
| LUXEMBOURG | 4.5% | 1.3 | 25.0% | 7.2/10.5 | 29.5% | 8.5/12.4 |
| MALTA | 0.5% | 0.002 | 2.0% | 0.01/0.10 | 2.4% | 0.01/0.12 |
| NETHERLANDS | 3.8% | 0 | 25.0% | 76.6/119.6 | 29.5% | 90.4/141.3 |
| POLAND | 3.5% | 47 | 10.0% | 140/249 | 11.8% | 166/294 |
| PORTUGAL | 8.1% | 25 | 15.0% | 65/85 | 17.7% | 77/100 |
| ROMANIA | 3.2% | 42 | 10.0% | 163/362 | 11.8% | 192/428 |
| SLOVAKIA | 10.5% | 17 | 18.0% | 31/46 | 21.2% | 36/54 |
| SLOVENIA | 10.2% | 10 | 15.0% | 15/19 | 17.7% | 17/23 |
| SPAIN | 10.1% | 159 | 25.0% | 410/1,102 | 29.5% | 484/1,302 |
| SWEDEN | 20.3% | 75 | 35.0% | 130/279 | 41.3% | 154/330 |

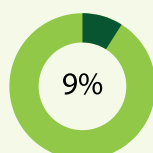
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS EU-27



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



14,120,629 ha
organic agricultural land



340,277 organic producers
on average farms of 41.5 ha



6,439,751 ha (6.6%)¹

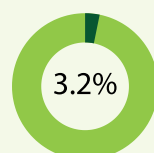


1,561,271 ha (14.9%)¹



6,050,165 ha 12.4%)¹

MARKET



€38,774 million
retail sales
€87 per capita



75,674 organic processors

CAP SUPPORT (2018)²



8,450,000 ha supported
64.3% of certified area
at average of 213 €/ha/year



1,803 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | Organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|-------------------------------------|-----------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 9.0% | 8.6% | 14,121 | 9,094 | 1,932 | 2,415 | 3,797 |
| LINEAR TREND⁴ | 15.0% | 6.0% | 23,503 | 15,017 | 3,278 | 4,097 | 6,482 |
| NATIONAL TARGETS⁵ | 21.2% | 12.3% | 33,220 | 20,962 | 4,405 | 5,506 | 8,817 |
| ENHANCED⁶ | 25.0% | 16.1% | 39,165 | 24,713 | 5,193 | 6,491 | 10,394 |

In 2018, conversion/maintenance support was paid on 64.0% certified area at 213.15 €/ha/year average. Based on these scenarios, a 25% by 2030 target is challenging but achievable, and would require a 3-5 fold increase in expenditure. If achieved, the current national targets would contribute 21.21% 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 EU outcome based on current national targets

⁶ Enhanced national targets needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|---|
| CONVERSION | 0-1,209 | 0-6,000 | 0-2,855 | 0-600 | Ensure conversion costs fully recognised |
| MAINTENANCE | 0-853 | 0-3,800 | 0-2,855 | 0-450 | Focus on provision of public goods |
| CONVERSION AS % OF MAINTENANCE | 100-478% | 100-300% | 100-128% | 100-465% | Reduce focus on premium prices as a reward for marketing activities |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | Increased by Member States, funded as Pillar 1 eco-schemes and/or Pillar 2 agri-environment-climate measures (AECMs), to deliver 25% target, market and public goods. | | | | |

EU ORGANIC ACTION PLAN

- 2021-2027
- Target by 2030: 25% share of organic area
- Future plans: Encourage development of Member States' action plans, research to support future policies

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Mixed range of eligibilities - combinations may be required, possible, restricted or prohibited

Action needed

Ensure opportunities for enhanced public good delivery building on synergies with organic management

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Good EU policy framework for investment, procurement and promotion

Encourage Member States' adoption of support options for organic market development, consistent with EU action plan, improve market data availability

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Good framework for advice, training and EIP operational groups with focus on organic in Rural Development Plans, but patchy implementation by Member States

Encourage Member States' adoption of support options for knowledge and innovation, consistent with EU action plan

LEGEND



Annual crops



Horticulture crops

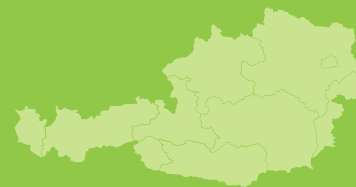


Permanent crops



Grassland

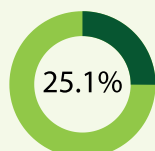
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS AUSTRIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



669,921 ha
organic agricultural land
0.43% of EU agricultural land



26,042 organic producers
on average farms of 25.7 ha



270,786 ha (20.1%)¹

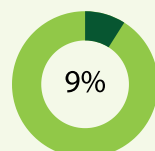


11,391 ha (17.1%)¹



387,744 ha (30.8%)¹

MARKET



€1,920 million
retail sales
€215 per capita



1,691 organic processors

CAP SUPPORT (2018)²



515,000 ha supported
80.6% of certified area
at average of 234 €/ha/year



121 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 25.1% | 4.3% | 670 | 540 | 127 | 158 | 196 |
| LINEAR⁴ | 35.5% | 3.8% | 946 | 763 | 179 | 224 | 277 |
| POTENTIAL⁵ | 40.0% | 5.4% | 1,068 | 861 | 202 | 252 | 313 |
| ENHANCED⁶ | 47.2% | 8.0% | 1,261 | 1,017 | 238 | 298 | 369 |

In 2018, conversion/maintenance support was paid on 81% certified area at 234.36 €/ha/year average. Based on these scenarios, a 40% by 2030 target is realistic and achievable, but would require a doubling of current expenditure if payment rates increased. If achieved, this would contribute 0.68% 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, national organic movement proposes 35% by 2027



⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

| CAP SUPPORT PAYMENTS (IN €/HA/YEAR) | | | | | ACTIONS NEEDED |
|---|---|---|---|---|--|
| |  |  |  |  | |
| CONVERSION | 70-230 | 450-1000 | 700 | 70-255 | Ensure conversion costs fully recognised |
| MAINTENANCE | 70-230 | 450-1000 | 700 | 70-255 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 100% | 100% | 100% | 100% | |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | Reduced, funded as Pillar 2 agri-environment-climate measures (AECMs). | | | | Keep focus on growing organic sector |

Keep and strengthen organic farming as the key measure in agri-environment-climate measures (AECMs). Support services and practices going beyond by means of combinable AECM measures. Ambitious and comprehensive use of project-based measures to support production and market development.

NATIONAL ORGANIC ACTION PLAN

- 2015-2020
- Target by 2020:
 -  >20% of national area
 -  Progress towards achieving targets: On target
- New action plan expected after CAP implementation. Need for more ambitious 2030 targets

| OTHER POLICY SUPPORT | Current context | Action needed |
|--|---|--|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations with most agri-environment options possible | Maintain/develop combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Organic applications prioritised for some schemes, promotion funding used | Maintain/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Organic applications prioritised, well supported | Maintain/develop support options to promote knowledge and innovation |

LEGEND

-  Annual crops
-  Horticulture crops
-  Permanent crops
-  Grassland
-  Production

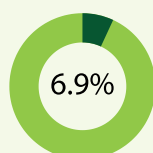
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS BELGIUM



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



93,118 ha
organic agricultural land
0.06 of EU agricultural land



2,394 organic producers
on average farms of 38.9 ha



31,789 ha (3.7%)¹

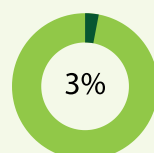


1,418 ha (6.9%)¹



58,123 ha (12.1%)¹

MARKET



€779 million
retail sales
€68 per capita



1,585 organic processors

CAP SUPPORT (2018)²



80,000 ha supported
89.4% of certified area
at average of 243 €/ha/year



19 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 6.9% | 7.9% | 93 | 83 | 20 | 25 | 28 |
| LINEAR⁴ | 11.5% | 6.2% | 156 | 140 | 34 | 42 | 47 |
| POTENTIAL⁵ | 20.0% | 17.4% | 271 | 242 | 59 | 73 | 82 |
| ENHANCED⁶ | 23.6% | 22.1% | 320 | 286 | 69 | 87 | 97 |

In 2018, conversion/maintenance support was paid on 89.4% certified area at 243 €/ha/year average. Based on these scenarios, a 20% by 2030 target is challenging but achievable, but would 3-4 times the current expenditure. If achieved, this would contribute 0.17% 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.organicineurope.bio





⁴ Linear trend growth continuing on 2014-2019 basis

⁵ Target proposed by independent researcher, regional official target of 30% for Wallonia



⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|-------------------------------------|
| CONVERSION | 390-550 | 550-1050 | 390-1050 | 270-350 | Maintain or increase funding levels |
| MAINTENANCE | 240-400 | 400-900 | 240-900 | 120-200 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 138-163% | 117-138% | 117-163% | 175-225% | |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | Maintained, funded as P1 eco-scheme (maintenance), P2 agri-environment-climate measures (AECMs) (conversion). | | | | |

REGIONAL ORGANIC ACTION PLANS

- 2013-2020
- In Belgium, its regions, Flanders and Wallonia, have agricultural competences
- Target by 2020:
 -  18% of national area (Walloon, no Flemish targets)
 -  Progress towards achieving targets: Behind target
- Separate regional plans in Wallonia and Flanders
 - Wallonia by 2030: 30% of national area and 18.7% share of retail sales value
 - Need for new Flemish action plan

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations with many agri-environment options possible

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic farming applications prioritised in some regions

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Organic applications prioritised in some regions

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops

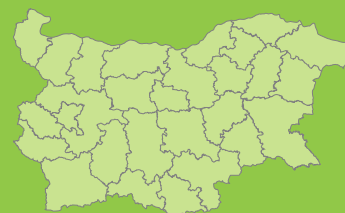


Grassland



Production

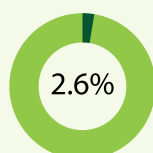
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS BULGARIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



117,779 ha
organic agricultural land
0.08% of EU agricultural land



6,213 organic producers
on average farms of 19 ha



63,940 ha (2.0%)¹

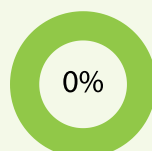


26,486 ha (26.4%)¹



27,339 ha (2.4)¹

MARKET



€30 million
retail sales
€4 per capita



234 organic processors

CAP SUPPORT (2018)²



68,000 ha supported
53.1% of certified area
at average of 354 €/ha/year



24 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 2.6% | 11.7% | 118 | 63 | 22 | 28 | 52 |
| LINEAR⁴ | 4.7% | 7.1% | 209 | 111 | 39 | 49 | 93 |
| POTENTIAL⁵ | 10.0% | 25.6% | 449 | 239 | 84 | 106 | 199 |
| ENHANCED⁶ | 11.8% | 31.9% | 530 | 282 | 100 | 125 | 235 |

In 2018, conversion/maintenance support was paid on 53.1% certified area at 354 €/ha/year average. Based on these scenarios, a 10% by 2030 target is challenging, and would require 5-10 times the current expenditure based on the current low share of certified area supported. If achieved, this would contribute 0.29% 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

⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED


| CAP SUPPORT PAYMENTS (IN €/HA/YEAR) | | | | | ACTIONS NEEDED |
|---|---|---|---|---|--|
| |  |  |  |  | |
| CONVERSION | 282 | 515-575 | 736 | 128-358 | Increase % of certified area supported |
| MAINTENANCE | 166 | 399-405 | 399-557 | 128-218 | Increase % of certified area supported |
| CONVERSION AS % OF MAINTENANCE | 170% | 130-140% | 130% | 100-164% | |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | Maintained, funded as Pillar 1 eco-scheme (maintenance), Pillar 2 agri-environment-climate measures (AECMs) (conversion). | | | | |

NATIONAL ORGANIC ACTION PLAN


- 2019-2027: Targets not specified
- No specific future plans. Need for updated action plan with 2030 targets

| OTHER POLICY SUPPORT | Current context | Action needed |
|--|---|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Limited combinations (erosion, rare breeds) possible, some options paid more than organic | Improve/develop combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Special provisions for organic projects | Maintain/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Limited provision, some specific organic programmes | Maintain/develop support options to promote knowledge and innovation |

LEGEND

 Annual crops

 Horticulture crops

 Permanent crops

 Grassland

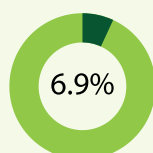
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS CROATIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



108,127 ha
organic agricultural land
0.07% of EU agricultural land



5,153 organic producers
on average farms of 21.0 ha



52,586 ha (6.0%)¹

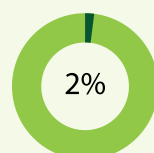


14,893 ha (20.7%)¹



40,648 ha (6.7%)¹

MARKET



€99 million
retail sales
€24 per capita



395 organic processors

CAP SUPPORT (2018)²



94,000 ha supported
91.5% of certified area
at average of 350 €/ha/year



33 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 6.9% | 23.2% | 108 | 99 | 35 | 43 | 47 |
| LINEAR⁴ | 14.9% | 10.5% | 233 | 213 | 74 | 93 | 102 |
| POTENTIAL⁵ | 15.0% | 10.6% | 234 | 214 | 75 | 94 | 103 |
| ENHANCED⁶ | 17.7% | 14.2% | 277 | 253 | 89 | 111 | 121 |

In 2018, conversion/maintenance support was paid on 91.5% certified area at 350 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, but would require up to 3 times current expenditure. If achieved, this would contribute 0.15% 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

⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED



CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|--|
| CONVERSION | 348 | 577 | 868 | 310 | Ensure conversion costs fully recognised |
| MAINTENANCE | 290 | 481 | 723 | 258 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 120% | 120% | 120% | 120% | |

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

CAP targets and other details should be made public as soon as possible, and discussions opened with both agriculture and environmental sectors. Organic farming should be supported in the simplest way. Extension services must be able to support the organic sector.

NATIONAL ORGANIC ACTION PLAN

- 2011-2016
- Targets by 2016:
 -  8% of national area
 -  30% of processing
- ⊖ Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations with most agri-environment options possible

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic applications prioritised (extra points)

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Organic covered as part of free advisory service, organic training compulsory for support applicants

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland



Production



Processing

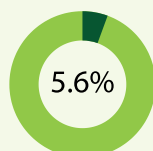
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS CYPRUS



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



6,240 ha
organic agricultural land
0.0% of EU agricultural land



1,252 organic producers
on average farms of 5 ha



3,021 ha (3.6%)¹

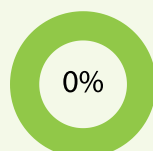


3,027 ha (11.5%)¹



172 ha (12.5%)¹

MARKET



€1 million
retail sales
€1 per capita



61 organic processors

CAP SUPPORT (2018)²



5,000 ha supported
76.2% of certified area
at average of 805 €/ha/year



4 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 5.6% | 12.1% | 6 | 4.8 | 3.8 | 4.8 | 6.3 |
| LINEAR⁴ | 10.2% | 7.6% | 11 | 8.7 | 7.0 | 8.8 | 11.5 |
| POTENTIAL⁵ | 10.0% | 7.2% | 11 | 8.5 | 6.9 | 8.6 | 11.3 |
| ENHANCED⁶ | 11.8% | 10.2% | 13 | 10.1 | 8.1 | 10.1 | 13.3 |

In 2018, conversion/maintenance support was paid on 76.2% certified area at 805 €/ha/year average. Based on these scenarios, a 10% by 2030 target is achievable, but would require 2-3 times the current expenditure. If achieved, this would contribute 0.01% 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)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|-------------------------------------|
| CONVERSION | 380 | 600 | 750-900 | 450 | Maintain or increase funding levels |
| MAINTENANCE | 380 | 600 | 750-900 | 450 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 100% | 100% | 100% | 100% | |
| 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

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Situation not reported

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic applications prioritised for some schemes

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Obligatory training to join organic support scheme

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland

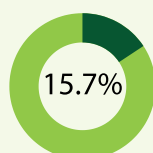
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS CZECH REPUBLIC



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



540,986 ha
organic agricultural land
0.35% of EU agricultural land



4,694 organic producers
on average farms of 115.3 ha



87,717 ha (3.5%)¹

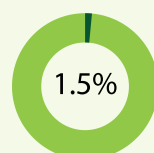


5,654 ha (15.2%)¹



441,044 ha (46.7%)¹

MARKET



€204 million
retail sales
€20 per capita



825 organic processors

CAP SUPPORT (2018)²



506,000 ha supported
97.3% of certified area
at average of 105 €/ha/year



53 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 15.7% | 2.9% | 541 | 527 | 55 | 69 | 71 |
| LINEAR⁴ | 20.9% | 3.0% | 721 | 702 | 73 | 92 | 94 |
| POTENTIAL⁵ | 25.0% | 5.4% | 864 | 841 | 88 | 110 | 113 |
| ENHANCED⁶ | 29.5% | 8.1% | 1020 | 993 | 104 | 130 | 133 |

In 2018, conversion/maintenance support was paid on 97.3% certified area at 105 €/ha/year average. Based on these scenarios, a 25% by 2030 target could be achievable, but would require a doubling of current expenditure. If achieved, this would contribute 0.55% 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, national official target 22% by 2027 and 25% by 2030

⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED





CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|--|
| CONVERSION | 79-265 | 536-669 | 419-900 | 84 | Ensure conversion costs fully recognised |
| MAINTENANCE | 69-180 | 466-583 | 417-845 | 83 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 115-147% | 115% | 100-107% | 101% | |

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... Maintained, funded as Pillar 2 agri-environment-climate measures (AECMs).

Adequate compensation for permanent pastures as organic arable land requires manure produced by animals on pastures. Arable land and vegetable production should be compensated 100%. Focus on investments in organic farmers and their needs, especially young farmers. Make higher ambition of water protection areas part of strategic plan.

NATIONAL ORGANIC ACTION PLAN

- 2016-2020
- Targets by 2020:
 -  15% of national area
 -  3% of retail sales
 -  Progress towards achieving organic land target: On target
 -  Progress towards achieving retail sales target: Behind target
- New action plan 2021-2027 with 23% organic area, 4% retail sales and 5% organic food in public catering by 2027
- 25% organic area by 2030

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations with many agri-environment options possible, also specific requirements

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic applications prioritised for some schemes

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

No specific support focused on organic farming

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland



Production



Retail sales

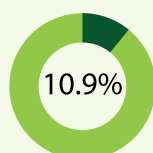
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS DENMARK



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



285,526 ha
organic agricultural land
0.18% of EU agricultural land



4,109 organic producers
on average farms of 69.5 ha



235,178 ha (10.0%)¹

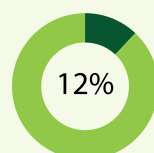


3,252 ha (11.7%)¹



47,096 ha (20.9%)¹

MARKET



€1,978 million
retail sales
€344 per capita



1,092 organic processors

CAP SUPPORT (2018)²



223,000 ha supported
86.8% of certified area
at average of 184 €/ha/year



41 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 10.9% | 14.4% | 286 | 248 | 46 | 57 | 66 |
| LINEAR⁴ | 21.5% | 8.8% | 562 | 487 | 90 | 112 | 129 |
| POTENTIAL⁵ | 25.0% | 11.7% | 654 | 567 | 104 | 130 | 150 |
| ENHANCED⁶ | 29.5% | 15.5% | 772 | 670 | 123 | 154 | 178 |

In 2018, conversion/maintenance support was paid on 86.8% certified area at 184 €/ha/year average. Based on these scenarios, a 25% by 2030 target is achievable, but would require up to 3 times current expenditure. If achieved, this would contribute 0.42% 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)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|-------------------------------------|
| CONVERSION | 277-344 | 277-344 | 813-880 | 277-344 | Maintain or increase funding levels |
| MAINTENANCE | 116-183 | 116-183 | 652-719 | 116-183 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 190-240% | 190-240% | 120-125% | 190-240% | |

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... Maintained, funded as Pillar 1 eco-scheme (maintenance), Pillar 2 agri-environment-climate measures (AECMs) (conversion).

Application of true-cost-accounting model with payment for public goods rather than a dedicated eco-scheme for organic. Investment in development, research and promotion of organic farming, including 70% public procurement and safeguarding a minimum budget until 2030.

NATIONAL ORGANIC ACTION PLAN

- 2018-tbc
- No specific production targets. Set new targets for 2030
- Extend current plan as needed

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations with many agri-environment options possible, but not grassland/wetland

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic applications prioritised for some schemes, promotion funding used

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Extensive support available from RDP and national (BOELN) funding

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops

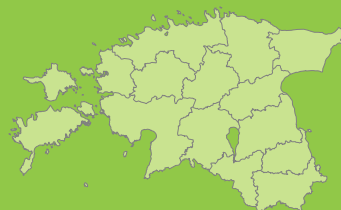


Permanent crops



Grassland

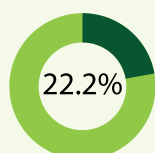
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS ESTONIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



220,737 ha
organic agricultural land
0.14% of EU agricultural land



2,060 organic producers
on average farms of 107.2 ha



120,467 ha (17.5%)¹

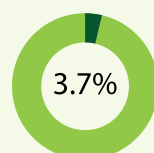


2,549 ha (73.5%)¹



97,721 ha (32.1%)¹

MARKET



€61.8 million
retail sales
€46 per capita



173 organic processors

CAP SUPPORT (2018)²



176,000 ha supported
85.1% of certified area
at average of 105 €/ha/year



18 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 22.2% | 8.4% | 221 | 188 | 20 | 25 | 29 |
| LINEAR⁴ | 37.8% | 6.4% | 376 | 320 | 33 | 42 | 49 |
| POTENTIAL⁵ | 30.0% | 3.2% | 299 | 254 | 27 | 33 | 39 |
| ENHANCED⁶ | 35.4% | 5.4% | 352 | 299 | 31 | 39 | 46 |

In 2018, conversion/maintenance support was paid on 85.1% certified area at 105 €/ha/year average. Based on these scenarios, a 30% by 2030 target is realistic and achievable, but would require up to 2 times current expenditure. If achieved, this would contribute 0.19% 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)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|--|
| CONVERSION | 137.5 | 231-660 | 330 | 27.5-88 ⁷ | Ensure conversion costs fully recognised |
| MAINTENANCE | 125 | 210-600 | 300 | 25-80 ⁷ | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 110% | 110% | 110% | 110% | |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | No information. | | | | Keep focus on growing organic sector |

Target for organic land should be at least 30%. Increase the payment rates both for conversion and maintenance considering that the present rates are among the lowest in the EU. Prioritize organic farming in investment, cooperation, advice, training, innovation and research measures.

⁷ In addition, organic livestock top up payments may be made, e.g. 255€/dairy cow, 25.5€/sheep, 6€/laying hen

NATIONAL ORGANIC ACTION PLAN

- 2014-2020
- Targets by 2020:
 -  180,000 ha national area
 -  20% regular (weekly) organic food consumers
 -  Net value added per labour unit in organic farming €20,500
 -  Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

| | Current context | Action needed |
|--|--|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations on same land not possible | Introduce combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Situation not reported | Support organic market development with appropriate schemes |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Organic applications not prioritised | Maintain/develop support options to promote knowledge and innovation |

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland



Production



Consumption

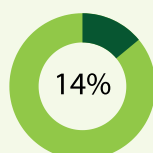
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS FINLAND



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



306,484 ha
organic agricultural land
0.2% of EU agricultural land



5,129 organic producers
on average farms of 59.8 ha



303,882 ha (14.0%)¹

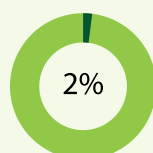


678 ha (18.6%)¹



1,924 ha (7.5%)¹

MARKET



€368 million
retail sales
€66 per capita



399 organic processors

CAP SUPPORT (2018)²



274,200 ha supported
92.2% of certified area
at average of 205 €/ha/year



56 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 14.0% | 8.8% | 306 | 282 | 58 | 72 | 79 |
| LINEAR⁴ | 24.1% | 6.6% | 529 | 488 | 100 | 125 | 136 |
| POTENTIAL⁵ | 25.0% | 7.2% | 549 | 506 | 104 | 130 | 141 |
| ENHANCED⁶ | 29.5% | 10.1% | 648 | 597 | 122 | 153 | 166 |

In 2018, conversion/maintenance support was paid on 92.2% certified area at 205 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require over 2 times current expenditure. If achieved, this would contribute 0.35% 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 National official target 20% by 2027 and 25% by 2030

⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED





CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|--|
| CONVERSION | 160 | 600 | - | 160-294 | Ensure conversion costs fully recognised |
| MAINTENANCE | 160 | 600 | - | 160-294 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 100% | 100% | - | 100% | |

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... Funded as Pillar 2 agri-environment-climate measures (AECMs) (maintenance), no support for conversion.

Strategic plan should add an adequate level of support for conversion to organic farming. Production-specific targets and support system for the organic animal production. Mandatory targets for organic food in public catering.

NATIONAL ORGANIC ACTION PLAN

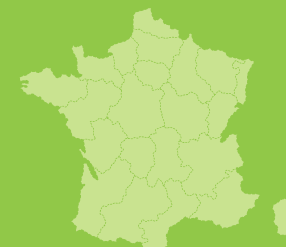
- 2013-2020
- Targets by 2030:
 -  25% of national area
 -  25% share of public catering
 -  100% increase in exports
 -  Progress towards achieving targets: Behind target

| OTHER POLICY SUPPORT | Current context | Action needed |
|--|--|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations with many agri-environment options possible, some double-funding restrictions | Improve/develop combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Organic applications prioritised for some schemes | Maintain/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Some organic specific programmes available | Maintain/develop support options to promote knowledge and innovation |

LEGEND

-  Annual crops
-  Horticulture crops
-  Permanent crops
-  Grassland
-  Production
-  Public catering

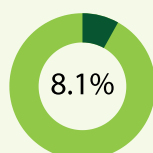
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS FRANCE



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



2,240,797 ha
organic agricultural land
1.43% of EU agricultural land



47,196 organic producers
on average farms of 47.5 ha



1,255,369 ha (6.9%)¹

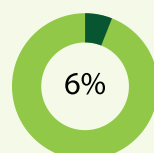


167,041 ha (17.5%)¹



818,387 ha (9.5%)¹

MARKET



€11,295 million
retail sales
€173 per capita



19,311 organic processors

CAP SUPPORT (2018)²



1,040,370 ha supported
51.1% of certified area
at average of 173 €/ha/year



180 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 8.1% | 20.1% | 2,241 | 1,146 | 198 | 248 | 485 |
| LINEAR⁴ | 17.0% | 10.1% | 4,735 | 2,421 | 419 | 523 | 1,024 |
| POTENTIAL⁵ | 25.0% | 19.1% | 6,954 | 3,555 | 615 | 769 | 1,504 |
| ENHANCED⁶ | 29.5% | 24.2% | 8,212 | 4,198 | 726 | 908 | 1,776 |

In 2018, conversion/maintenance support was paid on 51.1% certified area at 173 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require 3.5-7.5 times current expenditure. If achieved, this would contribute 4.44% 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 18% by 2027

⁶ Enhanced target needed to reach EU 25% target




CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|--|
| CONVERSION | 300 | 350-900 | 350-900 | 130 | Maintain or increase funding levels |
| MAINTENANCE | 0 | 0 | 0 | 0 | Restart to support provision of public goods |
| CONVERSION AS % OF MAINTENANCE | - | - | - | - | Review payment limits per holding |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | Greatly reduced, funded as Pillar 1 eco-schemes. Some support provided by water agencies. | | | | Review to prevent decline in organic sector |

Support environmental benefits of organic farming within eco-schemes. Ensure that eco-schemes payment is proportionate to the environmental benefits, thus greater payment level for organic farming. Align the French objective with the EU target of 25% organic land by 2030.

NATIONAL ORGANIC ACTION PLAN

- 2017-2022
- Targets by 2022:
 -  15% of national area
 -  22% of public procurement
 -  Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

Current context

Action needed

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Combinations with many agri-environment options possible, some double-funding restrictions

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic applications prioritised for some schemes

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Organic knowledge centres in some regions, training and research funded

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland



Production



Public procurement

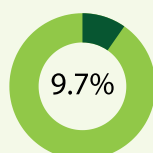
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS GERMANY



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



1,613,785 ha
organic agricultural land
1.03% of EU agricultural land



34,136 organic producers
on average farms of 47.3 ha



699,951 ha (5.9%)¹

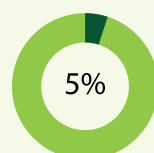


23,031 ha (11.4%)¹



830,000 ha (17.7%)¹

MARKET



€11,970 million
retail sales
€144 per capita



16,162 organic processors

CAP SUPPORT (2018)²



1,150,000 ha supported
80.6% of certified area
at average of 261 €/ha/year



300 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 9.7% | 10.8% | 1,614 | 1,301 | 340 | 425 | 527 |
| LINEAR⁴ | 17.7% | 7.6% | 2,955 | 2,383 | 622 | 778 | 964 |
| POTENTIAL⁵ | 20.0% | 9.7% | 3,343 | 2,696 | 704 | 880 | 1,091 |
| ENHANCED⁶ | 23.6% | 13.1% | 3,948 | 3,183 | 831 | 1,039 | 1,288 |

In 2018, conversion/maintenance support was paid on 80.6% certified area at 261 €/ha/year average. Based on these scenarios, a 20% by 2030 target is realistic and achievable, but would require 2-3 times current expenditure. If achieved, this would contribute 2.13% 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



⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|--|
| CONVERSION | 209-520 | 415-6000 | 655-2855 | 190-364 | Maintain or increase funding levels |
| MAINTENANCE | 189-273 | 300-3800 | 665-2855 | 189-273 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 110-190% | 140-160% | 100% | 100-133% | |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | Maintained, funded as Pillar 2 agri-environment-climate measures (AECMs). | | | | Focus support on public goods provided |

NATIONAL ORGANIC ACTION PLAN

- 2017-2023
- Target by 2030:
 -  20% of national area
 -  Progress towards achieving targets: Behind target
- Extend current plan as needed. Need for upgraded 2030 targets

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations with many agri-environment options possible

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic applications prioritised for some schemes, promotion funding used

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Extensive support available from RDP and national (BOELN) funding

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland



Production

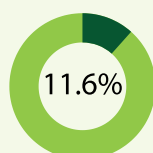
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS GREECE



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



528,752 ha
organic agricultural land
0.34% of EU agricultural land



30,124 organic producers
on average farms of 17.6 ha



179,003 ha (10.2%)¹

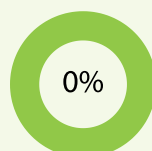


70,200 ha (7.6%)¹



279,549 ha (15%)¹

MARKET



€66 million
retail sales
€5 per capita



1,642 organic processors

CAP SUPPORT (2018)²



248,000 ha supported
50.4% of certified area
at average of 390 €/ha/year



97 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 11.6% | 9.1% | 529 | 267 | 104 | 130 | 258 |
| LINEAR⁴ | 19.1% | 5.9% | 869 | 438 | 171 | 214 | 424 |
| POTENTIAL⁵ | 20.0% | 6.6% | 911 | 459 | 179 | 224 | 444 |
| ENHANCED⁶ | 23.6% | 9.4% | 1,076 | 542 | 212 | 265 | 525 |

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)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|--|
| CONVERSION | 72-550 | 550 | 299-850 | 211-333 | Ensure conversion costs fully recognised |
| MAINTENANCE | 70-594 | 550 | 225-850 | 260-383 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 100% | 100% | 100% | 80-90% | 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

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Limited opportunities for combinations

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic applications prioritised (extra points)

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Limited availability of relevant programmes

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops

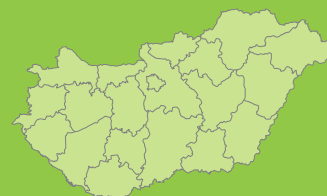


Permanent crops



Grassland

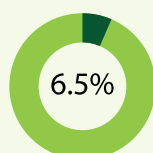
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS HUNGARY



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



303,190 ha
organic agricultural land
0.19% of EU agricultural land



5,136 organic producers
on average farms of 59.0 ha



103,887 ha (2.7%)¹

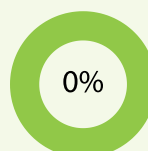


14,520 ha (9.7%)¹



184,783 ha (26.8%)¹

MARKET



€30 million
retail sales
€3 per capita



523 organic processors

CAP SUPPORT (2018)²



115,000 ha supported
55.2% of certified area
at average of 186 €/ha/year



21 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 6.5% | 28.6% | 303 | 167 | 31 | 39 | 70 |
| LINEAR⁴ | 13.6% | 9.9% | 633 | 349 | 65 | 81 | 147 |
| POTENTIAL⁵ | 15.0% | 11.9% | 701 | 386 | 72 | 90 | 163 |
| ENHANCED⁶ | 17.7% | 15.7% | 827 | 456 | 85 | 106 | 192 |

In 2018, conversion/maintenance support was paid on 55.2% certified area at 186 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, but would require 3-5 times current expenditure. If achieved, this would contribute 0.45% 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

⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED




CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|--|
| CONVERSION | 242 | 516 | 734-1,040 | 84-147 | Ensure conversion costs fully recognised |
| MAINTENANCE | 172 | 516 | 568-802 | 84-147 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 141% | 100% | 130% | 100% | Increase % of certified area supported |

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

National strategic plan should include a real commitment to achieve significant growth with an overall vision how to make it viable and serving the society as a whole. A structural change is essential both in vision and in practical terms. The area of non-utilized organic grassland should not be increased more, rather valuable, productive cultures. A society-wide transformation is necessary supported by clear, scientifically valid and value-based communication and harmonized legal framework.

NATIONAL ORGANIC ACTION PLAN

- 2014-2020
- Targets by 2020:
 -  350,000 ha of national area
 -  30% of social catering
 -  Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

| OTHER POLICY SUPPORT | Current context | Action needed |
|--|---|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations on same land not possible | Introduce combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Organic applications prioritised (extra points) | Maintain/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Situation not reported | Maintain/develop support options to promote knowledge and innovation |

LEGEND

-  Annual crops
-  Horticulture crops
-  Permanent crops
-  Grassland
-  Production
-  Social catering

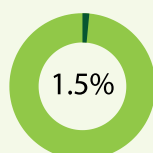
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS IRELAND



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



73,952 ha
organic agricultural land
0.05% of EU agricultural land



1,725 organic producers
on average farms of 42.9 ha



4,319 ha (0.9%)¹

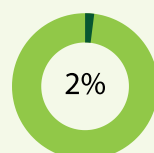


64 ha (3.8%)¹



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 EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | | |
|------------------------------|-----------------------------|-----------------------|--------------------|----------------------|---------------------------|-------------------------------|---|---|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ | If 100% certified area supported at EU 2018 rate ⁶ |
| 2014-2019 | 1.5% | 8.5% | 74 | 72 | 8 | 10 | 10 | 16 |
| LINEAR⁴ | 2.3% | 4.9% | 114 | 111 | 12 | 15 | 16 | 24 |
| POTENTIAL⁵ | 12.0% | 63.0% | 586 | 570 | 63 | 79 | 81 ⁶ | 125 ⁶ |
| ENHANCED⁷ | 14.2% | 76.0% | 692 | 673 | 75 | 94 | 96 | 148 |

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)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|---|
| CONVERSION | 60-260 | 60-300 | 60-300 | 60-220 | Ensure conversion costs fully recognised |
| MAINTENANCE | 30-170 | 30-200 | 30-200 | 30-170 | Increase funding levels to reflect the full costs of organic production |
| CONVERSION AS % OF MAINTENANCE | 150-200% | 150-200% | 150-200% | 130-200% | |
| 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

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations with many agri-environmental options possible, but some restrictions

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Capital investment scheme and some national funding for processing investment and market development

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Limited provision of funded advice and training

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland



Production



Organic market

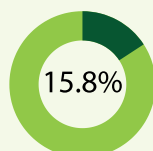
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS ITALY



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



1,993,225 ha
organic agricultural land
1.27% of EU agricultural land



70,561 organic producers
on average farms of 28.2 ha



961,692 ha (13.5%)¹

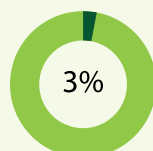


480,459 ha (21.8%)¹



551,074 ha (17.0%)¹

MARKET



€3,625 million
retail sales
€59 per capita



21,940 organic processors

CAP SUPPORT (2018)²



1,098,000 ha supported
56.1% of certified area
at average of 352 €/ha/year



386 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 15.8% | 8.7% | 1,993 | 1,118 | 393 | 491 | 876 |
| LINEAR⁴ | 27.8% | 6.9% | 3,505 | 1,966 | 691 | 864 | 1,541 |
| POTENTIAL⁵ | 35.0% | 11.0% | 4,409 | 2,473 | 870 | 1,087 | 1,938 |
| ENHANCED⁶ | 41.3% | 14.7% | 5,207 | 2,921 | 1,027 | 1,284 | 2,289 |

In 2018, conversion/maintenance support was paid on 56.1% certified area at 352 €/ha/year average. Based on these scenarios, a 35% by 2030 target is achievable, but would require 2.5-5 times current expenditure. If achieved, this would contribute 2.81% 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, national organic movement proposes > 50%

⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED




CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|--|
| CONVERSION | 100-706 | 180-1,200 | 113-1,200 | 20-600 | Ensure conversion costs fully recognised |
| MAINTENANCE | 90-600 | 270-1,200 | 102-900 | 12-450 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 110-120% | 100% | 110-130% | 130-170% | Increase % of certified area supported |

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

At least 30% of CAP budget dedicated to climate and environment in both pillars. National strategic plan must clearly indicate objectives for organic growth and tools to achieve them. Encourage creation of organic districts through collective measures and cooperation for environmental objectives.

NATIONAL ORGANIC ACTION PLAN

- 2016-2020
- Targets by 2020:
 -  20% of national area
 -  5M€ retail sales
 -  Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Only in some regions, combinations on same land not possible or limited to rare breeds in many regions

Action needed

Introduce combinations/specific options for organic farms to benefit from synergies

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Well supported with organic prioritised, regional variations


Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

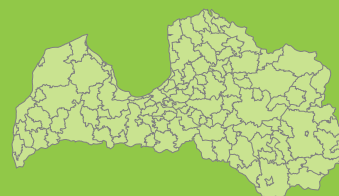
Generally well supported with regional variations

Maintain/develop support options to promote knowledge and innovation

LEGEND

-  Annual crops
-  Horticulture crops
-  Permanent crops
-  Grassland
-  Production
-  Retail sales

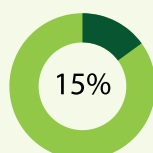
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS LATVIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



289,796 ha
organic agricultural land
0.18% of EU agricultural land



4,178 organic producers
on average farms of 69.4 ha



150,567 ha (11.7%)¹

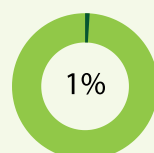


3,003 ha (39.8%)¹



136,226 ha (21.5%)¹

MARKET



€51 million
retail sales
€6 per capita



51 organic processors

CAP SUPPORT (2018)²



261,000 ha supported
93.1% of certified area
at average of 107 €/ha/year



28 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 15.0% | 8.5% | 290 | 269.7 | 28.8 | 36 | 38.7 |
| LINEAR⁴ | 25.0% | 6.0% | 482 | 448.9 | 47.9 | 59.9 | 64.4 |
| POTENTIAL⁵ | 25.0% | 6.1% | 483 | 449.3 | 48 | 60 | 64.5 |
| ENHANCED⁶ | 29.5% | 8.8% | 570 | 530.6 | 56.7 | 70.8 | 76.1 |

In 2018, conversion/maintenance support was paid on 93.1% certified area at 107 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require 2 times current expenditure. If achieved, this would contribute 0.31% 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) | | | | | ACTIONS NEEDED |
|---|---|---|---|---|-------------------------------------|
| |  |  |  |  | |
| CONVERSION | 559 | 1,000-1,200 | 900 | 282-450 | Maintain or increase funding levels |
| MAINTENANCE | 117 | 399 | 485 | 97 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 478% | 250-300% | 186% | 290-465% | |
| 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 | Current context | Action needed |
|--|--|--|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations with most agri-environment options possible | Maintain/develop combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Special provisions for organic projects | Maintain/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Special provisions for organic projects | Maintain/develop support options to promote knowledge and innovation |

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland

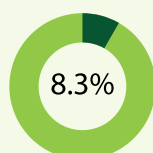
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS LITHUANIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



242,118 ha
organic agricultural land
0.15% of EU agricultural land



2,417 organic producers
on average farms of 100.2 ha



150,816 ha (7.1%)¹

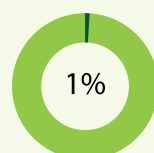


5,387 ha (21.1%)¹



85,915 ha (11.2%)¹

MARKET



€50 million
retail sales
€17 per capita



124 organic processors

CAP SUPPORT (2018)²



184,000 ha supported
76.8% of certified area
at average of 197 €/ha/year



36 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|-----------------------------|-----------------------|--------------------|----------------------|---------------------------|-------------------------------|---|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 8.3% | 9.5% | 242 | 186 | 37 | 46 | 60 |
| LINEAR⁴ | 13.8% | 6.1% | 404 | 310 | 61 | 76 | 99 |
| POTENTIAL⁵ | 15.0% | 7.4% | 439 | 337 | 66 | 83 | 108 |
| ENHANCED⁶ | 17.7% | 10.4% | 518 | 398 | 78 | 98 | 127 |

In 2018, conversion/maintenance support was paid on 76.8% certified area at 197 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, but would require 2-3.5 times current expenditure. If achieved, this would contribute 0.28% 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)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|--|
| CONVERSION | 238-298 | 516-534 | 534 | 182 | Ensure conversion costs fully recognised |
| MAINTENANCE | 218-283 | 487-525 | 518 | 176 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 105-109% | 102-106% | 103% | 103% | |

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... Small increase in organic support rates proposed.

Support development of local organic market by setting a strict target of achieving 30% organic food in public catering by 2025 and 70% by 2030. Allocate portion of eco-schemes budget for organic farming conversion. Increase national budget % for organic farming in the CAP.

NATIONAL ORGANIC ACTION PLAN

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

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Not possible

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic applications prioritised for some schemes

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Organic mentioned but no specific prioritisation

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland

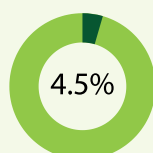
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS LUXEMBOURG



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



5,814 ha
organic agricultural land
0.00% of EU agricultural land



105 organic producers
on average farms of 55.4 ha



2,630 ha (4.2%)¹

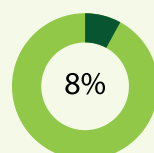


201 ha (13.1%)¹



2,983 ha (4.4%)¹

MARKET



€160 million
retail sales
€264 per capita



101 organic processors

CAP SUPPORT (2018)²



4,900 ha supported
85.4% of certified area
at average of 258 €/ha/year



1.3 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 4.5% | 5.9% | 6 | 5 | 1.3 | 1.6 | 1.9 |
| LINEAR⁴ | 7.5% | 6.3% | 10 | 8.4 | 2.2 | 2.7 | 3.2 |
| POTENTIAL⁵ | 25.0% | 42.0% | 33 | 27.9 | 7.2 | 9.0 | 10.5 |
| ENHANCED⁶ | 29.5% | 51.2% | 39 | 32.9 | 8.5 | 10.6 | 12.4 |

In 2018, conversion/maintenance support was paid on 85.4% certified area at 258 €/ha/year average. Based on these scenarios, a 25% by 2030 target is realistic and achievable, but would require 6-7 times current expenditure. If achieved, this would contribute 0.02% 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, national official target 20% by 2025

⁶ Enhanced target needed to reach EU 25% target




CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|--|
| CONVERSION | 238-298 | 516-534 | 534 | 182 | Ensure conversion costs fully recognised |
| MAINTENANCE | 218-283 | 487-525 | 518 | 176 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 105-109% | 102-106% | 103% | 103% | |

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... Maintained, funded as Pillar 2 agri-environment-climate measures (AECMs).

NATIONAL ORGANIC ACTION PLAN

- 2019-2025
- Targets by 2025:
 -  20% of national area
 -  40% of public procurement
 -  Progress towards achieving targets: Behind target
- No specific future plans, 100% land area by 2050 target. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations with most agri-environment options possible

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic mentioned but no specific prioritisation

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

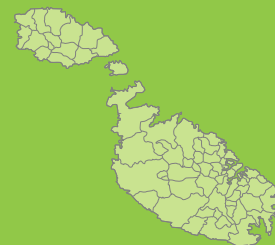
Situation not reported

Maintain/develop support options to promote knowledge and innovation

LEGEND

-  Annual crops
-  Horticulture crops
-  Permanent crops
-  Grassland
-  Production
-  Public procurement

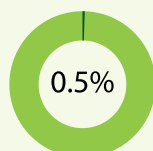
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS MALTA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



55 ha
organic agricultural land
0.00% of EU agricultural land



24 organic producers
on average farms of 2.3 ha



28 ha (0.3%)¹



27 ha (2.1%)¹



0 ha (0.0%)¹

MARKET



7 organic processors

CAP SUPPORT (2018)²



10 ha supported
13.3% of certified area
at average of 374 €/ha/year



0.002 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 0.5% | 13.3% | 0 | 0.01 | 0 | 0 | 0.03 |
| LINEAR⁴ | 1.0% | 8.6% | 0 | 0.01 | 0.01 | 0.01 | 0.05 |
| POTENTIAL⁵ | 2.0% | 27.9% | 0 | 0.03 | 0.01 | 0.01 | 0.10 |
| ENHANCED⁶ | 2.4% | 34.6% | 0 | 0.04 | 0.01 | 0.02 | 0.12 |

In 2018, conversion/maintenance support was paid on 13.3% certified area at 374 €/ha/year average. Based on these scenarios, a 2% by 2030 target could be achievable, but a higher target still would be desirable. If achieved, this would contribute 0.0% 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)

| |  |  |  |  | ACTIONS NEEDED |
|--|---|---|---|---|--|
| CONVERSION | 1,209 | 1,209 | 1,209 | - | Increase % of certified area supported |
| MAINTENANCE | 555 | 555 | 555 | - | Increase % of certified area supported |
| CONVERSION AS % OF MAINTENANCE | 218% | 218% | 218% | - | |
| 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

| | Current context | Action needed |
|---|--|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations on same land not possible | Introduce combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Situation not reported | Introduce/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Situation not reported | Introduce/develop support options to promote knowledge and innovation |

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland

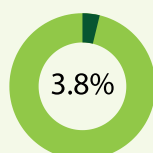
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS NETHERLANDS



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



68,068 ha
organic agricultural land
0.04% of EU agricultural land



1,867 organic producers
on average farms of 36.5 ha



27,306 ha (2.7%)¹

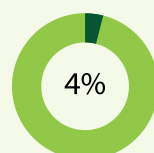


825 ha (2.2%)¹



39,937 ha (5.5%)¹

MARKET



€1,211 million
retail sales
€71 per capita



1,021 organic processors

CAP SUPPORT (2018)²



0.00 ha supported
0.0% of certified area
at average of 0 €/ha/year



0 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 3.8% | 7.7% | 68 | 0 | 0 | 0 | 0 |
| LINEAR⁴ | 6.2% | 5.8% | 111 | 89 | 19 | 23.7 | 29.6 |
| POTENTIAL⁵ | 25.0% | 50.9% | 449 | 359 | 76.6 | 95.7 | 119.6 |
| ENHANCED⁶ | 29.5% | 61.7% | 530 | 424 | 90.4 | 113.0 | 141.3 |

In 2018, conversion/maintenance support was paid on 0.0% certified area. An assumption has been made that 80% of certified area could be supported at 213.15 €/ha EU average rate. Based on these scenarios, a 25% by 2030 target is challenging, but could be achievable if support system was reviewed. If achieved, this would contribute 0.29% 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

⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|--------------------------------|---|---|---|---|--|
| CONVERSION | 0 | 0 | 0 | 0 | Review support to recognise public goods |
| MAINTENANCE | 0 | 0 | 0 | 0 | Review support to recognise public goods |
| CONVERSION AS % OF MAINTENANCE | 0% | 0% | 0% | 0% | |

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... No specific organic support planned, still aim to be market-only driven, no recognition of public goods.

NATIONAL ORGANIC ACTION PLAN

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

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

No organic support available, agri-environment-climate measures (AECMs) are the only option available

Action needed

Introduce combinations/specific options for organic farms to benefit from synergies

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Situation not reported

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Situation not reported

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland

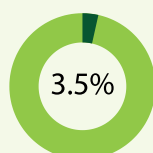
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS POLAND



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



507,637 ha
organic agricultural land
0.32% of EU agricultural land



18,655 organic producers
on average farms of 27.2 ha



375,740 ha (3.5%)¹

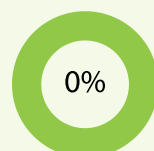


31,924 ha (8.1%)¹



99,973 ha (3.1%)¹

MARKET



€314 million
retail sales
€8 per capita



636 organic processors

CAP SUPPORT (2018)²



342,000 ha supported
70.5% of certified area
at average of 138 €/ha/year



47 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 3.5% | -4.6% | 508 | 358 | 49 | 62 | 88 |
| LINEAR⁴ | 0.9% | -6.8% | 127 | 89 | 12 | 15 | 22 |
| POTENTIAL⁵ | 10.0% | 16.7% | 1,441 | 1,016 | 140 | 175 | 249 |
| ENHANCED⁶ | 11.8% | 21.4% | 1,701 | 1,200 | 166 | 207 | 294 |

In 2018, conversion/maintenance support was paid on 70.5% certified area at 138 €/ha/year average. Based on these scenarios, a 10% by 2030 target could be achievable, but the current decline needs to be reversed, with 3-5 times the expenditure. If achieved, this would contribute 0.92% 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) | | | | | ACTIONS NEEDED |
|---|---|---|---|---|--|
| |  |  |  |  | |
| CONVERSION | 215-265 | 308-362 | 184-438 | 125 | Ensure conversion costs fully recognised |
| MAINTENANCE | 153-217 | 305-308 | 154-349 | 124 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 120-140% | 100-120% | 120-125% | 101% | |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | No information. | | | | |

NATIONAL ORGANIC ACTION PLAN

- 2014-2020
- Target by 2020:
 -  700 processors
 -  Progress towards achieving targets: On target
- New plan for 2021-2027, possibly integrated with CAP Strategic Plan. Need for targets for 2030

| OTHER POLICY SUPPORT | Current context | Action needed |
|--|--|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations on same land not possible | Introduce combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Situation not reported | Maintain/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Situation not reported | Maintain/develop support options to promote knowledge and innovation |

LEGEND

-  Annual crops
-  Horticulture crops
-  Permanent crops
-  Grassland
-  Processors

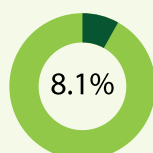
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS PORTUGAL



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



293,213 ha
organic agricultural land
0.19% of EU agricultural land



5,637 organic producers
on average farms of 52 ha



55,675 ha (5.3%)¹



61,196 ha (8.7%)¹



176,342 ha (9.4%)¹

MARKET



933 organic processors

CAP SUPPORT (2018)²



206,000 ha supported
96.5% of certified area
at average of 124 €/ha/year



25 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 8.1% | 7.6% | 293 | 283 | 35 | 44 | 45 |
| LINEAR⁴ | 10.2% | 2.4% | 370 | 357 | 44 | 55 | 57 |
| POTENTIAL⁵ | 15.0% | 7.8% | 546 | 527 | 65 | 82 | 85 |
| ENHANCED⁶ | 17.7% | 10.9% | 645 | 622 | 77 | 96 | 100 |

In 2018, conversion/maintenance support was paid on 96.5% certified area at 124 €/ha/year average. Based on these scenarios, a 15% by 2030 target is realistic and achievable, but would require up to 3 times current expenditure. If achieved, this would contribute 0.35% 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, national official target 12% by 2027




⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|--|
| CONVERSION | 19-600 | 144-600 | 60-900 | 41-204 | Ensure conversion costs fully recognised |
| MAINTENANCE | 16-530 | 120-600 | 50-900 | 34-170 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 115-120% | 100-120% | 100-120% | 120% | Review payment degression for larger areas |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | No information. | | | | |

NATIONAL ORGANIC ACTION PLAN

- 2018-2027
- Targets by 2027:
 -  12% of national area
 -  50% increase in consumption
 -  Progress towards achieving targets: Behind target
- No specific future plans. Need for targets for 2030

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Situation not reported

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Situation not reported

Introduce/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Situation not reported

Introduce/develop support options to promote knowledge and innovation

LEGEND

-  Annual crops
-  Horticulture crops
-  Permanent crops
-  Grassland
-  Production
-  Consumption

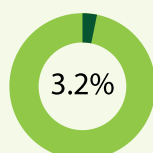
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS ROMANIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



395,228 ha
organic agricultural land
0.25% of EU agricultural land



9,277 organic producers
on average farms of 42.6 ha



257,665 ha (3.3%)¹

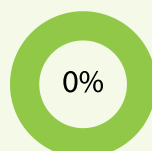


22,143 ha (7.3%)¹



115,420 ha (2.7%)¹

MARKET



€40 million
retail sales
€2 per capita



191 organic processors

CAP SUPPORT (2018)²



183,000 ha supported
56.1% of certified area
at average of 232 €/ha/year



42 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 3.2% | 7.3% | 395 | 222 | 51 | 64 | 114 |
| LINEAR⁴ | 4.8% | 4.7% | 600 | 337 | 78 | 98 | 174 |
| POTENTIAL⁵ | 10.0% | 19.7% | 1,250 | 702 | 163 | 203 | 362 |
| ENHANCED⁶ | 11.8% | 24.9% | 1,476 | 829 | 192 | 240 | 428 |

In 2018, conversion/maintenance support was paid on 56.1% certified area at 232 €/ha/year average. Based on these scenarios, a 10% by 2030 target could be achievable, but would require 4-7 times current expenditure. If achieved, this would contribute 0.80% 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) | | | | | ACTIONS NEEDED |
|---|---|---|---|---|--|
| |  |  |  |  | |
| CONVERSION | 293 | 365-500 | 530-620 | 39-143 | Ensure conversion costs fully recognised |
| MAINTENANCE | 218 | 350-431 | 442-479 | 73-129 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 134% | 105-115% | 120-130% | 110% | |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | No information. | | | | |

NATIONAL ORGANIC ACTION PLAN

- No current or recent action plan
- Regional action plan in North-West Romania
- No specific future plans. Need for action plan with 2030 targets

| OTHER POLICY SUPPORT | Current context | Action needed |
|--|---|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations possible, even compulsory on permanent grassland | Improve/develop combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Organic projects prioritised | Maintain/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Special provisions for organic projects | Maintain/develop support options to promote knowledge and innovation |

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland

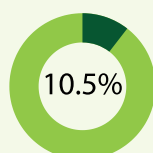
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS SLOVAKIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



197,565 ha
organic agricultural land
0.13% of EU agricultural land



802 organic producers
on average farms of 246.3 ha



68,022 ha (5.1%)¹

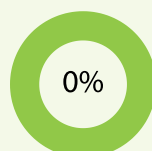


1,797 ha (9.8%)¹



127,746 ha (24.4%)¹

MARKET



€4 million
retail sales
€0 per capita



85 organic processors

CAP SUPPORT (2018)²



158,000 ha supported
83.6% of certified area
at average of 108 €/ha/year



17 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 10.5% | 1.9% | 198 | 165 | 18 | 22 | 27 |
| LINEAR⁴ | 12.2% | 1.5% | 230 | 192 | 21 | 26 | 31 |
| POTENTIAL⁵ | 18.0% | 6.6% | 340 | 284 | 31 | 39 | 46 |
| ENHANCED⁶ | 21.2% | 9.4% | 401 | 335 | 36 | 45 | 54 |

In 2018, conversion/maintenance support was paid on 83.6% certified area at 108 €/ha/year average. Based on these scenarios, an 18% by 2030 target is challenging and achievable, requiring up to 3 times current expenditure. If achieved, this would contribute 0.22% 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, official national target 16% by 2027

⁶ Enhanced target needed to reach EU 25% target

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|--------------------------------|---|---|---|---|--|
| CONVERSION | 153 | 290-529 | 330-671 | 96 | Ensure conversion costs fully recognised |
| MAINTENANCE | 153 | 290-529 | 330-671 | 96 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 100% | 100% | 100% | 100% | |

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

Organic land target should be higher than the planned 16% by 2027 set by the government. Need to support and develop organic processing and advisory services.

NATIONAL ORGANIC ACTION PLAN

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

| OTHER POLICY SUPPORT | Current context | Action needed |
|---|--|--|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Combinations with many agri-environment options possible | Maintain/develop combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Situation not reported | Introduce/develop support options to promote organic market development |
| SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH | Situation not reported | Retrieving data. Wait a few seconds and try to cut or copy again. |

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland

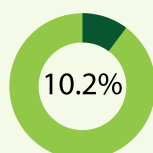
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS SLOVENIA



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



49,638 ha
organic agricultural land
0.03% of EU agricultural land



3,823 organic producers
on average farms of 13 ha



6,521 ha (3.7%)¹

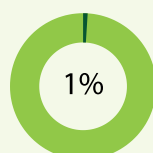


3,089 ha (11.5%)¹



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 EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 10.2% | 4.1% | 50 | 48 | 10 | 12 | 13 |
| LINEAR⁴ | 14.1% | 3.5% | 69 | 66 | 14 | 17 | 18 |
| POTENTIAL⁵ | 15.0% | 4.3% | 73 | 70 | 15 | 18 | 19 |
| ENHANCED⁶ | 17.7% | 6.8% | 87 | 83 | 17 | 22 | 23 |

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

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

| |  |  |  |  | ACTIONS NEEDED |
|--|---|---|---|---|--|
| CONVERSION | 312 | 600-800 | 291-900 | 378 | Ensure conversion costs fully recognised |
| MAINTENANCE | 326 | 600 | 189-900 | 156 | 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

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations with most agri-environment options possible

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Organic projects prioritised

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

Special provisions for organic projects, compulsory training for organic support applicants

Maintain/develop support options to promote knowledge and innovation

LEGEND



Annual crops



Horticulture crops



Permanent crops



Grassland



Production



Retail sales

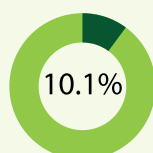
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS SPAIN



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



2,354,915 ha
organic agricultural land
1.50% of EU agricultural land



41,838 organic producers
on average farms of 56.3 ha



494,213 ha (4.3%)¹

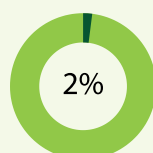


606,406 ha (14.6%)¹



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

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 10.1% | 7.5% | 2,355 | 1,095 | 166 | 208 | 447 |
| LINEAR⁴ | 15.7% | 5.0% | 3,652 | 1,699 | 258 | 322 | 693 |
| POTENTIAL⁵ | 25.0% | 13.3% | 5,807 | 2,701 | 410 | 513 | 1,102 |
| ENHANCED⁶ | 29.5% | 17.4% | 6,858 | 3,190 | 484 | 606 | 1,302 |

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.organicineurope.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)

| |  |  |  |  | ACTIONS NEEDED |
|---------------------------------------|---|---|---|---|--|
| CONVERSION | 81-894 | 128-2013 | 75-934 | 45-450 | Ensure conversion costs fully recognised |
| MAINTENANCE | 30-853 | 41-1561 | 60-900 | 41-450 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 100-120% | 100-120% | 100-120% | 100-120% | Increase % of certified area supported |

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

| | Current context | Action needed |
|--|---|---|
| COMBINATION WITH OTHER AGRI-ENVI MEASURES | Regional variations, details not reported | Improve/develop combinations/specific options for organic farms to benefit from synergies |
| SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION | Regional variations, details not reported | Support organic market development with appropriate schemes |
| 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

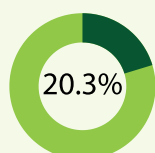
PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS SWEDEN



#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION



613,963 ha
organic agricultural land
0.39% of EU agricultural land



5,730 organic producers
on average farms of 107.1
ha



476,981 ha (18.6%)¹

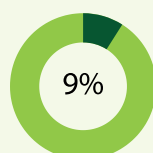


610 ha (15.4%)¹



136,372 ha (30.2%)¹

MARKET



€2,143 million
retail sales
€214 per capita



1,117 organic processors

CAP SUPPORT (2018)²



355,000 ha supported
58.3% of certified area
at average of 211 €/ha/year



75 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

| | National organic area share | Average annual growth | Organic area (kha) | | CAP expenditure (M€/year) | | |
|------------------------------|--------------------------------|--------------------------|--------------------|-------------------------|---------------------------|----------------------------------|--|
| | | | Certified | Supported by the CAP | 2018 rates | 2018 rates + 25% ³ | If 100% certified area supported ³ |
| 2014-2019 | 20.3% | 4.5% | 614 | 358 | 76 | 94 | 162 |
| LINEAR⁴ | 29.5% | 4.1% | 892 | 520 | 110 | 137 | 235 |
| POTENTIAL⁵ | 35.0% | 6.6% | 1,057 | 617 | 130 | 163 | 279 |
| ENHANCED⁶ | 41.3% | 9.4% | 1,249 | 728 | 154 | 192 | 330 |

In 2018, conversion/maintenance support was paid on 58.3% certified area at 211 €/ha/year average. Based on these scenarios, a 35% by 2030 target is achievable, but would require 2-4 times current expenditure. If achieved, this would contribute 0.68% 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)

| |  |  |  |  | ACTIONS NEEDED |
|---|---|---|---|---|---|
| CONVERSION | 142 | 472 | 708 | 76-151 | Ensure conversion costs fully recognised |
| MAINTENANCE | 142 | 472 | 708 | 76-151 | Maintain or increase funding levels |
| CONVERSION AS % OF MAINTENANCE | 100% | 100% | 100% | 100% | Review restricted eligibility for grassland |
| DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE... | Maintained, levels uncertain, probably as an eco-scheme in Pillar 1 as one support for both conversion and maintenance. | | | | |

Increase level of support per hectare of organic farming to fully cover maintenance costs. Include grasslands and agroforestry in organic farming support. Make sure support schemes based on animal units take into account lower intensity in organic farming to avoid disadvantage.

NATIONAL ORGANIC ACTION PLAN

- 2018-2030
- Targets by 2030:
 -  30% of national area
 -  60% of public procurement
 -  Progress towards achieving targets: Behind target

OTHER POLICY SUPPORT

COMBINATION WITH OTHER AGRI-ENVI MEASURES

Current context

Combinations possible on arable land, no organic support for permanent grassland so AECMs the only option

Action needed

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

SUPPORT INVESTMENTS, MARKET DEVELOPMENT & PROMOTION

Rural Development Plan (RDP) support available for organic projects

Maintain/develop support options to promote organic market development

SUPPORT FOR ADVICE, TRAINING, INNOVATION & RESEARCH

RDP support available for organic projects, research and knowledge dissemination promoted

Maintain/develop support options to promote knowledge and innovation

LEGEND

-  Annual crops
-  Horticulture crops
-  Permanent crops
-  Grassland
-  Production
-  Public procurement

PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS TECHNICAL NOTES



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KEY INDICATORS 2019

PRODUCTION AND MARKET

- The organic land area, the retail sales value (total and per capita) and operators number data (producers and processors) for 2019 are from FiBL data sets available on <https://statistics.fibl.org/europe.html>. These data are consistent in most cases with Eurostat data, with some exceptions (e.g. Germany);
- The breakdown by organic land use category (arable land, permanent crops, grassland) is from FiBL: <https://statistics.fibl.org/visualisation/crops.html>;
- The total agricultural land area (UAA) and breakdown by main land use type data for the % share calculations are from Eurostat <https://ec.europa.eu/eurostat/data/database>, but relate to 2016, the latest year for which data are currently available.

CAP SUPPORT

- The total support expenditure, share of certified area supported and average support per hectare values for each country and the EU-27 are 2018 data from a not yet published report compiled by the Thünen Institute.¹

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

THE COLUMNS

- National organic area share: This is the share of national agricultural area (Utilised Agricultural Area or UAA) farmed under organic principles. Values are actual for 2019 and estimations for 2030, determined as indicated below for each scenario;
- Annual average growth rates are calculated on the basis of the start and end values for each period, in the historic case 2014 and 2019, in subsequent scenarios 2019 and 2030. These values assume a constant growth percentage each year, although it is likely that over time these growth rates will diminish as the sectors grow larger.
- The linear trend values are estimated using linear regression analysis of the data for all years from 2014 to 2019, not only the start and end values, to forecast the outcome in 2030.
- Organic area (kha):
 - Certified: Initial 2019 data increased as appropriate for each scenario
 - Supported by the CAP: assuming same share of certified area receiving organic conversion and maintenance support as in 2018.¹
- CAP expenditure (million EUR):
 - Total annual expenditure (million EUR, 2018 average rates): Based on 2018 average payment per hectare data from Thünen Institute report,¹ multiplied by area supported. Values include both EU and national co-financing.
 - 2018 rates +25%: Expenditure if 25% increase in payment rates (million EUR): Assumes that the 2018 average payment per hectare are increased by 25%.
 - If 100% certified area supported: Assumes that the 2018 +25% average payment per hectare is applied to all certified area. In some countries unsupported land is permanent grassland where a lower rate of payment might be expected, so these values represent top end of range.

THE FOUR ROWS

- 2014-2019: it is the historic growth based on actual area data up to 2019, with 2019 expenditure estimated based on 2018 values (see Key indicators above).
- Linear trend: assumes that the growth from 2019 to 2030 will keep the same growth rate calculated using linear regression analysis as achieved in 2014-2019.
- Feasible: These scenarios are proposed on the basis of either:
 - Official targets in national action plans or CAP strategic plans,
 - Organic sector preferred targets as communicated by IFOAM Organics Europe's members,
 - Value suggested by the consultant on basis of current situation and scenario results.
 - The origin of the targets varies from country to country, and it is explained in the footnotes.
- Enhanced: the organic land growth share needed to deliver the 25% EU target are based on pro rata increases to the Feasible growth values.

IN THE TEXT

The percentage points contribution to the EU target refers to the share of EU UAA that would be achieved, so a 1 percentage point contribution to the 25% target is 1% of EU UAA, not 1% of the target.

CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

- Conversion & Maintenance: Data on organic conversion and maintenance payment rates for different land use types are for 2019 (reflecting the 2015-2020 rural development programmes) and sourced from the Thünen Institute report.¹ Payment ranges reflect crop type, area and regional variations – full details are available in the report.
- Conversion as % of maintenance: this is the percentage value of conversion payments compared to maintenance payments, directly calculated from the two values above. Given payments are calculated on an income foregone basis, and conversion normally entails additional investment and restructuring costs, as well as lack of access to organic premium prices, conversion payments might be expected to be substantially higher than maintenance payments, at least for the first 2-3 years until full organic status is achieved.
- Plans for CAP 2021-2027 organic support to be...: Information on future CAP plans reflect responses to IFOAM Organic Europe's survey (April-May 2021) of its national member organisations.

NATIONAL ORGANIC ACTION PLAN

- Data on current national action plans is obtained from the Thünen Institute report.¹
- Information on future action plans reflect responses to IFOAM Organics Europe's 2021 survey of member organisations.

OTHER POLICY SUPPORT

- Assessments of other support policies (Current context and Actions needed) reflect the judgement of the consultant based on the Thünen Institute report.¹
- Information was integrated and validated by IFOAM Organics Europe's Council members.

¹ Lampkin N and Sanders S (2021 in press) Organic support payments in the European Union. Thünen Working Paper. Braunschweig: Thünen Institute.

² CAP support for organic conversion and maintenance, including national co-financing.

PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS COLOPHON



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