

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

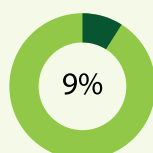
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KEY INDICATORS 2019

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

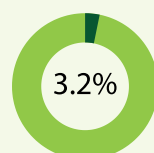


1,561,271 ha (14.9%)¹



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