ORGANIC FARMING IN EUROPE

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Instituto de investigaciones para la agricultura orgánica

Organic Farming in Europe – A Brief Overview

Prepared for the European Organic Congress
'Organic Food and Farming in times of Climate Change, Biodiversity loss and Global Food Crisis'

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Frick/Brussels, December 1, 2009

EXCELLENCE FOR SUSTAINABILITY

Organic agriculture continues to develop dynamically in Europe. In most countries the organic area is on the increase and the market continues to grow. This positive development is also due to several policy support measures; such as funding under rural development programmes, legal protection, action plans as well as support for research. The organic sector, represented by the EU group of the International Federation of Organic Agriculture IFOAM (IFOAM EU Group), plays an important role for the further development of organic food and farming in Europe.

Contents

European organic agriculture in a global context

About one quarter of the world's organic agricultural land (32.2 million hectares in total) is in Europe (Willer & Kilcher 2009). The European market for organic food accounts for 54 percent of the global organic market and is thus larger than the North American market (43 percent). Global turnover with organic food was 46 billion US dollars in 2007 and should have topped the 50 billion US dollars mark in 2008 (Sahota 2009).

Statistical Development: Growth continues

Since the beginning of the 1990s, organic farming has rapidly developed in almost all European countries. In Europe, currently more than eight million hectares[1] are managed organically by more than 220'000 producers (2008, see Table 1).

In the European Union (EU 27) more than 7.5 million hectares are managed organically by almost 200'000 producers (end of 2008). This constitutes 4.3 percent of the agricultural area.

Compared to the previous year (2007), the organic agricultural land in Europe increased by more than 0.4 million hectares. The increase is due to high growth rates in Spain as well as in new member states like Poland, the Czech Republic or the Slovak Republic. In the recent years, growth rates were higher in the new member states compared to those in the EU 15.

The difference between the countries regarding the importance of organic farming is substantial. There are four countries now where more than 10 percent of the agricultural land is organic: Liechtenstein (29.7 percent; 2007), Austria (15.9 percent), Switzerland (11 percent, 2007), and Sweden (10.8 percent). Other countries have only 1 percent.

[1] Data according to the survey of the Research Institute of Organic Agriculture FiBL, based on information of governments, Eurostat or the private sector. For complete table and list of information sources see annex. The annual survey on organic agriculture world-wide is carried out by the Research Institute of Organic Agriculture FiBL and the International Federation of Organic Agriculture Movements IFOAM. It is financially supported by the Swiss State Secretariat for Economic Affairs, the International Trade Centre ITC. A further sponsor is Nürnberg Messe.

The country with the largest organic agricultural land area is Spain with 1.1 million hectares, followed by Italy with 1 million hectares, and Germany is in third place (0.9 million hectares). Up to 2007, Italy was the country in Europe with the most organic agricultural land.

The country with the highest number of producers is Italy (more than 44’000 producers).

The European market for organic food and drink

The turnover with organic food and drink (general retails sales, specialized shops, farm gates sales etc.) is now approximately 18’000 million Euros (2008). The largest market is Germany with approximately 5’850 million Euros, followed by the UK (2’610 million Euros), France (2’600 million Euros) and Italy (1’970 million Euros) (2008).

The highest market shares with around five percent of the total market or higher are reached in Denmark, Austria, and Switzerland. While the organic land has expanded rapidly in many new EU member states as well as in candidate and potential EU candidate countries, consumption levels have remained very low in these countries (less than 1 percent).

With the economic crisis there have been signs of the market development slowing down in some countries, but many companies have reported further growth in the first six months of 2009. Figures on the market development in 2009 will be available from early 2010.

EU regulation on organic farming

Organic farming has had legal protection since the beginning of the 1990s with Council Regulation (EEC) No 2092/91. On July 20, 2007, the new organic regulation was published, ‘Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91’, which came into force on January 1, 2009.

According to the European Commission (European Commission 2007), the new rules set out a complete set of objectives, principles and basic rules for organic production, and include a new permanent import regime and a more consistent control regime. The use of the EU organic logo, which is currently decided upon, will be mandatory, but it can be accompanied by national or private logos.

On August 6, 2009, the detailed rules on organic aquaculture animal and seaweed production were published in the Official Journal of the European Union and came into force three days later. Currently rules on organic wine and wine making are under discussion.

With the EU regulation considerable protection for both consumers and producers has been achieved. It is furthermore important because it is the basis for the payments under the rural development programmes and for action plans. Data collection by Eurostat is closely linked to the regulation; data are collected by all member states among certifiers. The new EU regulation stipulates that all member states deliver their data to Eurostat annually.

Rural development policy

The area-based agri-environmental support encourages the conversion to and (in most cases) the continuation of organic production. This support has continued under the 2000-2006 and 2007-2013 Rural Development Programmes of the European Union. Now all 27 EU member states provide some form of support of this type for organic farming, which is the most important measure in financial terms. Also many countries that are not EU members provide similar support.

However, payment rates, eligibility conditions and requirements vary considerably between countries. At the same time, the rural development programmes have enabled broader based support of the organic sector, for example investment in processing, training, marketing and promotion.

The development of Organic Action Plans provides a means of achieving better integration of these different measures (Schmid et al., 2007).

Action plans for organic food and farming

Organic Action Plans provide a framework for integrating policies and measures in order to encourage organic sector development. Thus Action Plans serve as a strategic instrument for governments to achieve policy goals, particularly when multiple policy areas (such as agriculture, environment, trade) and different levels of policy formulation are to be integrated (Schmid et al. 2007).

According to a survey by the IFOAM EU Group and FiBL, at least 15 countries in Europe have or had an action plan (Gonzalvez 2009), many of them with quantitative targets. Austria for instance aims to have 20 percent organic land by 2010.

In 2004 the European Action Plan for Organic Food and Farming was launched[2]. The information campaign proposed in the plan started in July 2008. With this campaign, Action 1 - a multi-annual EU-wide information and promotion campaign to inform consumers, public institutions' canteens, schools and other key actors – is implemented. The campaign homepage[3] offers a wide range of information on organic agriculture and numerous tools (pictures, flyers) to support the promotion of organic agriculture.

Research

Today, organic farming research is substantially funded under national research programs or national organic action plans, as well as through European projects.[4] Even though no figures for all European countries are available, it is known that the funds of the eleven countries that are part of the ERA-Net project CORE Organic[5], amount to more than 60 million Euros annually (Lange 2007).

Since the mid-1990s, several organic farming research projects have been funded under the framework programmes of the European Commission. Furthermore there were several European projects that did not have organic farming as their focus but carried out research related to organic farming in the framework of individual work packages.

With the beginning of the 7th research framework program in 2008, several projects focusing on organic farming started. One of them is the project CERTCOST - Economic analysis of certification systems for organic food and farming. The project proposes to combine the experience and knowledge of both researchers and SMEs to fulfill the following objectives: analyze the implementation of organic certification systems and estimate all relevant expenditures or transaction costs for different certification systems along the organic food supply chain in various regions of Europe. The project will run for three years and is funded with 2.7 million Euros.

Further projects are

2 Information on the European Action plan is available at http://ec.europa.eu/agriculture/organic and at www.organic-europe.net/.

3 Homepage of the European Promotion Campaign http://ec.europa.eu/agriculture/organic/splash_en

4 For a list of projects funded by the European Commission see www.organic-europe.net/europe_eu/research-euprojects.asp

5 CORE Organic (Co-ordination of European Transnational Research in Organic Food and Farming); Internet www.coreorganic.org. CORE Organic is a three year co-ordination action in organic food and farming (2004 to 2007). The overall objective is to gather the critical mass and enhance quality, relevance and utilization of resources in European research in organic food and farming.

- LowInputBreeds - Development of integrated livestock breeding and management strategies to improve animal health, product quality and performance in European organic and "low input" milk, meat and egg production;
- Organic Sensory Information System (OSIS): Documentation of sensory properties through testing and consumer research for the organic industry (Ecropolis);
- Indicators for biodiversity in organic and low-input farming systems (BioBio).

On December 2, 2008, the Technology Platform (TP) 'Organics' was launched with a public presentation in Brussels. The platform joins the efforts of industry and civil society in defining organic research priorities and defending them vis-à-vis the policy-makers. The TP's vision paper, published in December 2008, reveals the huge potential of organic food production to mitigate some of the major global problems from climate change and food security, to the whole range of socio-economic challenges in the rural areas (Niggli et al. 2008). The platform is a growing initiative of several EU umbrella organizations and enterprises with a big potential to integrate many more business partners, and national and EU-level public and private actors in the field.

Currently the Strategic Research Agenda SRA, the second major document of TP Organics,[6] is finalized.

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  Internet www.tporganics.eu
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  Internet: http://ec.europa.eu/agriculture/organic
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Links

[6] For further information see www.tporganics.eu
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- IFOAM EU Group
  www.ifoam-eu.org
- International Federation of Organic Agriculture Movements (IFOAM)
  www.ifoam.org
- European Commission: Organic farming
  europa.eu.int/comm/agriculture/qual/organic/index_en.htm
- Eurostat: Organic farming data
  ec.europa.eu/eurostat
  > Statistics > Statistics A-Z > Agriculture > Data > Main tables > Organic Farming
- FiBL – Research Institute of Organic Agriculture
  www.fibl.org
- Organic Europe (maintained by FiBL): Country reports, address database, statistics
  www.organic-europe.net
- Organic World (maintained by FiBL): Statistics, country information, news
  www.organic-world.net
- Organic Market Info: Market News and updates
  www.organic-market.info
- CORE Organic Web portal: Country reports on the organic farming research situation in 11 European countries
  www.coreportal.org
- Technology Platform TP Organics
  www.tporganics.eu

Further reading

Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91http://eur-lex.europa.eu/LexUriServ/site/en/oj/2007/l_189/l_18920070720en00010023.pdf

Council Regulation (EEC) No 2092/91 of 24 June 1991 on organic production of agricultural products and indications referring thereto on agricultural products and foodstuffs; available via http://ec.europa.eu/agriculture/qual/organic/reg/index_en.htm

European Commission: Organic Food: New Regulation to foster the further development of Europe's organic food sector-: press release of June 12, 2007, Download at http://europa.eu/rapid/pressReleasesAction.do?reference=IP/07/807&format=HTML&aged=0&language=EN&guiLanguage=en

Gonzalvez, Victor (2009: Organic Action Plans in Europe. In: Willer, Helga and Kilcher, Lukas (Eds.) (2009) The World of Organic Agriculture - Statistics and Emerging Trends 2009. IFOAM, Bonn; FiBL, Frick; ITC, Geneva.

Lange, Stefan; Williges, Ute; Saxena, Shilpi and Willer, Helga, Eds. (2006) Research in Organic Food and Farming. Reports on organization and conduction of research programs in 11 European countries. Bundesanstalt für Landwirtschaft und Ernährung (BLE) / Federal Agency for Agriculture and Food BLE, Bonn, Germany. Archived at http://orgprints.org/8798/

Niggli, Urs; Slabe, Anamarija; Schmid, Otto; Halberg, Niels und Schlüter, Marco (2008) Vision for an Organic Food and Farming Research Agenda 2025. Organic Knowledge for the Future. Technology Platform Organics, Brussels. Archived at http://orgprints.org/13439/

Sahota, Amarjit (2009: The global market for organic food and drink. In: Willer, Helga and Kilcher, Lukas (Eds.) (2009) The World of Organic Agriculture - Statistics and Emerging Trends 2009. IFOAM, Bonn; FiBL, Frick; ITC, Geneva

Schmid, Otto; Dabbert, Stephan; Eichert, Christian; Gonzálvez, Victor; Lampkin, Nic; Michelsen, Johannes; Slabe, Annamarija; Stokkers, R.; Stolze, Matthias; Stopes, Christopher; Wollmuthová, P.; Vairo, Daniela and Zanoli, Rafaele (2008) Organic Action Plans. Development, implementation and evaluation. A resource manual for the organic food and farming sector. Research Institute of Organic Agriculture (FiBL); CH-Frick and European Union Group of the International Federation of Organic Agriculture Movements (IFOAM), Brussels. Archived at orgprints.org/13481/

Willer, Helga and Kilcher, Lukas (Eds.) (2009) The World of Organic Agriculture - Statistics and Emerging Trends 2009. IFOAM, Bonn; FiBL, Frick; ITC, Geneva. More information at www.organic-world.net/yearbook.html

Annex: Table and Graphs

All tables and graphs reflect the state of the FiBL survey per November 22, 2009. Some data may not yet be final and revisions may occur. Furthermore not for all countries 2008 data are available yet.

Table 1: Organic agricultural land and producers in Europe 2008

Survey in progress (November 24, 2009)

For data revisions and updates see www.organic-world.net/basic-data.html

The table excludes forest areas, aquaculture as well as wild collection

Country	Data year	Area [ha]	Share of agr. land	Producers
Albania	2007	77	0.0%	100
Austria	2008	382'949	15.9%	20'102
Belgium	2008	35'719	2.6%	901
Bosnia Herzegovina	2007	691	0.0%	304
Bulgaria	2008	16'663	0.5%	254
Croatia	2008	9'993	0.8%	632
Cyprus		2'322	1.6%	305
Czech Republic	2008	341'632	8.0%	1'946
Denmark	2008	150'104	5.6%	2'753
Estonia	2008	87'346	9.6%	1'259
Faroe Islands	2007	12	0.4%	
Finland	2008	150'374	6.6%	3'991
France	2008	583'799	2.1%	13'298
Germany	2008	907'786	5.4%	19'813
Greece	2008	317'824	3.8%	24'057
Hungary	2008	122'816	2.9%	1'614
Iceland	2007	6'229	0.3%	36
Ireland	2008	44'751	1.1%	1'220
Italy	2008	1'002'414	7.9%	44'556
Latvia	2008	161'625	9.1%	4'203
Liechtenstein	2007	1'048	29.7%	39
Lithuania	2008	122'200	4.6%	2'797
Luxemburg	2008	3'535	2.7%	85
Macedonia, FYR	2007	1'333	0.1%	127
Malta	2007	12	0.1%	30
Moldova	2007	11'695	0.5%	121
Montenegro	2008	1'876	0.4%	25
Netherlands	2008	50'434	2.6%	1'402
Norway	2008	52'248	5.1%	2'702
Poland	2008	313'944	2.0%	14'888
Portugal	2007	229'717	6.6%	1'949
Romania	2008	140'132	1.0%	2'775
Russian Federation, European Part	2007	32'643	0.0%	14
Serbia	2008	4'530	0.1%	224
Slovak Republic	2008	140'755	7.3%	350
Slovenia	2008	29'838	6.1%	2'067
Spain	2008	1'129'844	4.5%	21'291
Sweden	2008	336'439	10.8%	3'686
Switzerland	2007	116'641	11.0%	6'199

Country	Data year	Area [ha]	Share of agr. land	Producers
Turkey	2008	109'387	0.4%	16'276
UK	2008	737'630	4.6%	5'383
Ukraine	2007	249'872	0.6%	92
Total		**8'140'877**	**2.0%**	**223'866**
European Union		*7'542'603*	*4.3 %*	*196'975*

Source: FiBL Survey in progress. For data sources see the end of this document.
Totals for the calculation of the percentages taken from Eurostat, national ministry data or the FAO statistical database FAOSTAT.

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Some notes:

- Austria: Austria now uses the land managed by the so-called INVEKOS farms as a basis for the calculation of the organic percentage of the total, hence the increase in the share of the organic land compared to previous years.
- Spain: The figure in the table excludes the wild collection areas and is hence lower than the overall figure for the certified area as communicated by the Spanish Ministry of Agriculture or Eurostat.
- UK: The figure used here is from Defra, which differs from the Eurostat figure

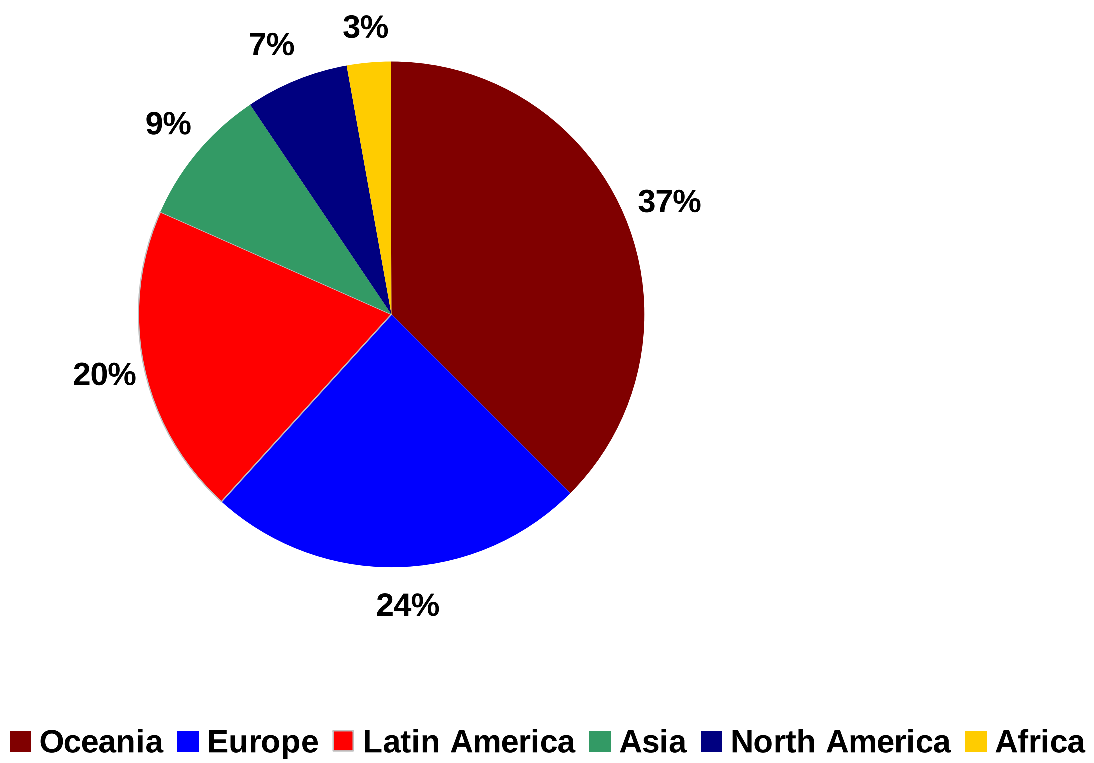

Figure 1: Distribution of the world's organic agricultural land by geographical region 2007

Source: FiBL & IFOAM, 2009

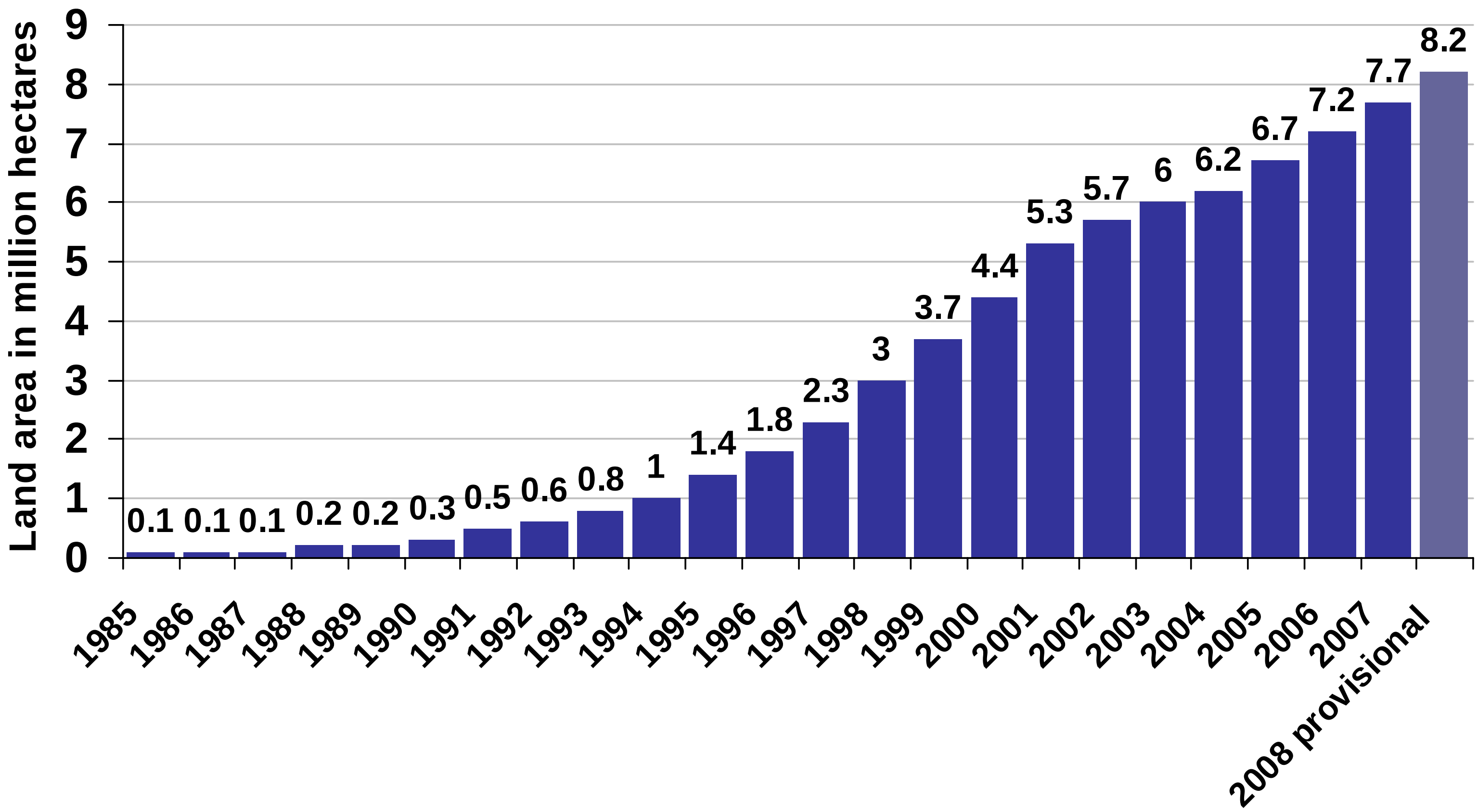

Figure 2: Development of the organically managed land area in Europe 1985-2008 (including forest and aquaculture, excluding wild collection)

Source: Aberystwyth University, FiBL Survey (for data after 2003)

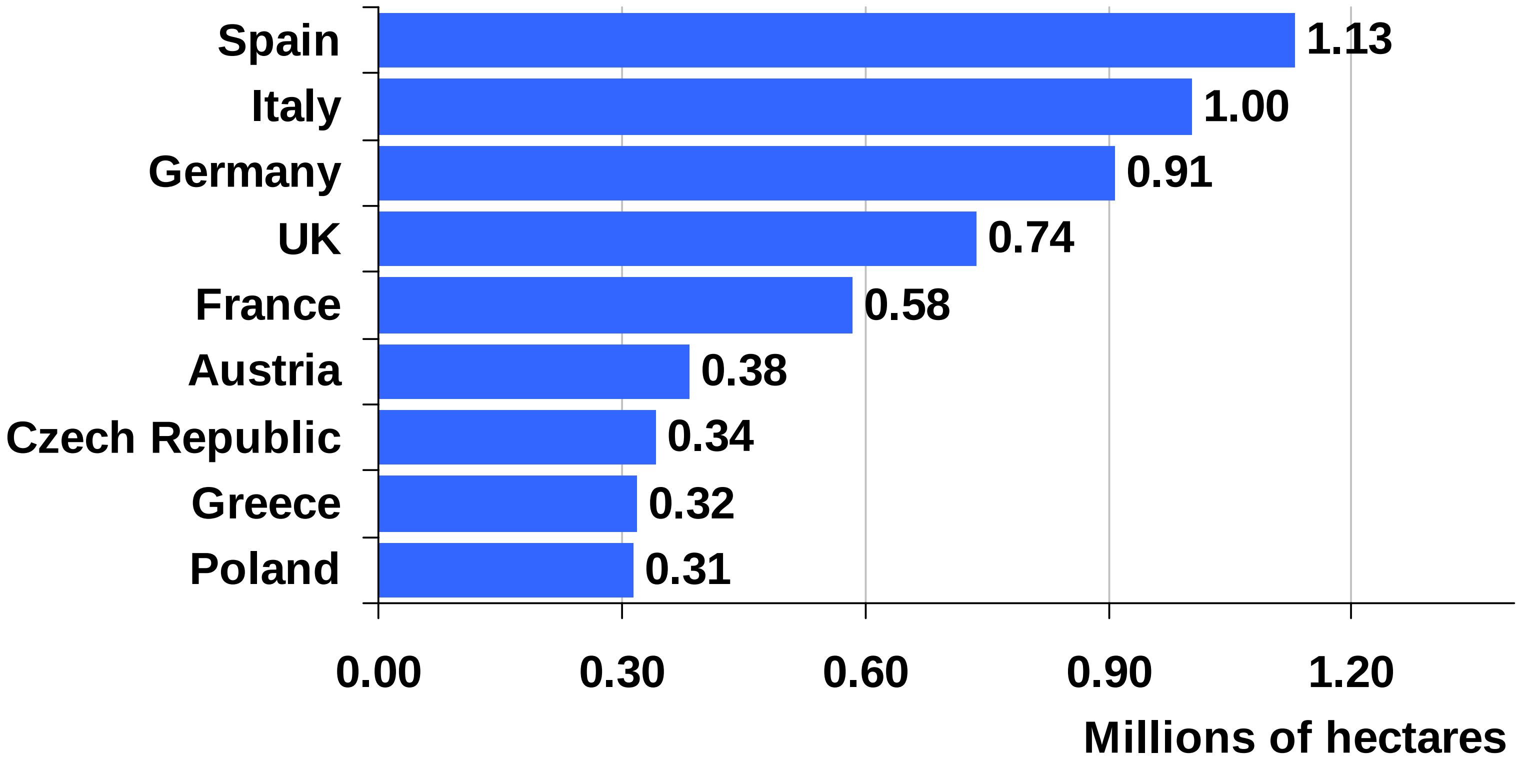

Figure 3: The ten European countries with the largest areas of organic agricultural land 2008, survey in progress

Source: FiBL Survey. For data sources see end of this document.

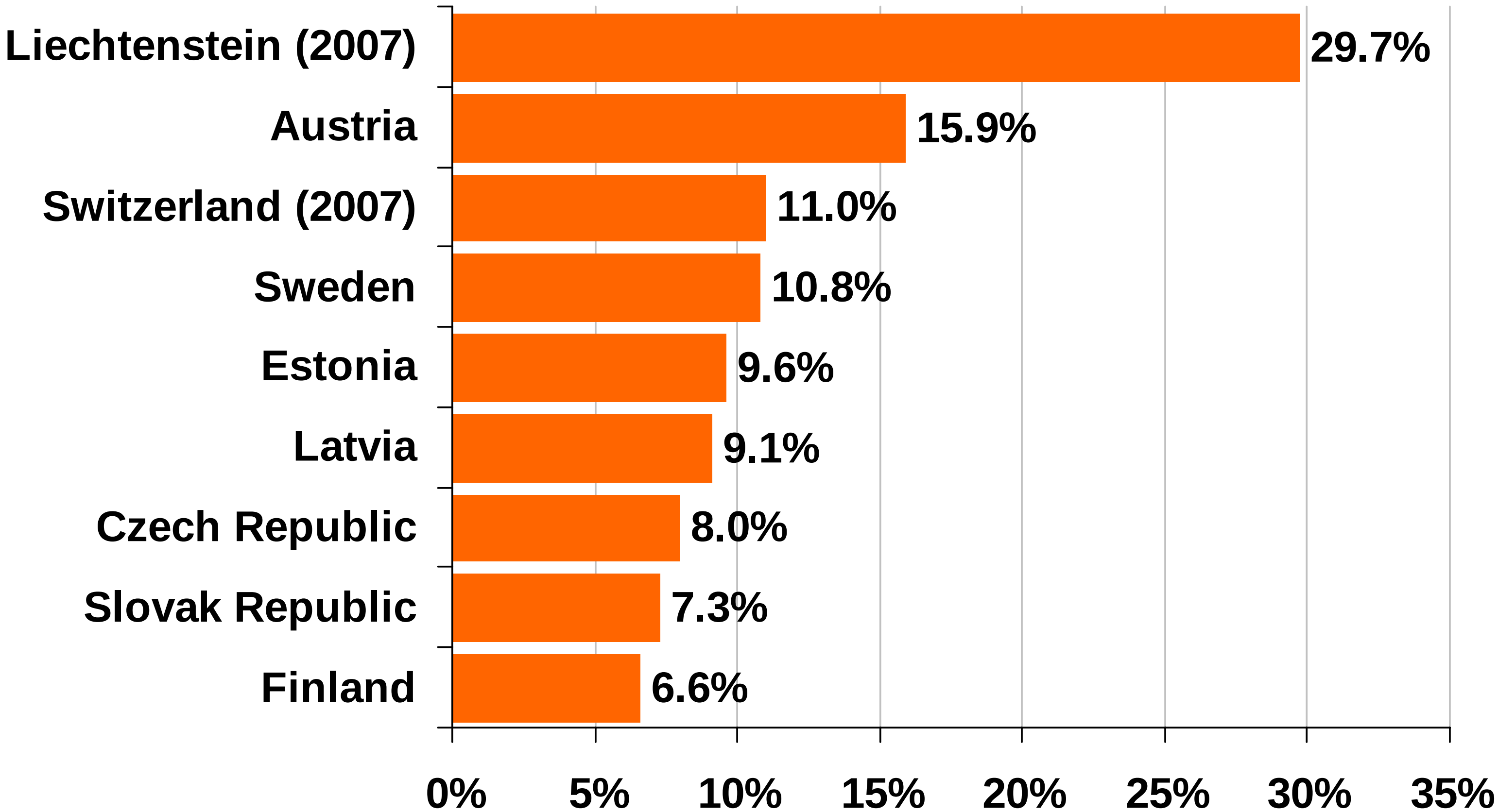

Figure 4: The ten European countries with the highest shares of organic agricultural land of the total agricultural land 2008; Survey in progress

Source: FiBL Survey. For data sources see end of this document.

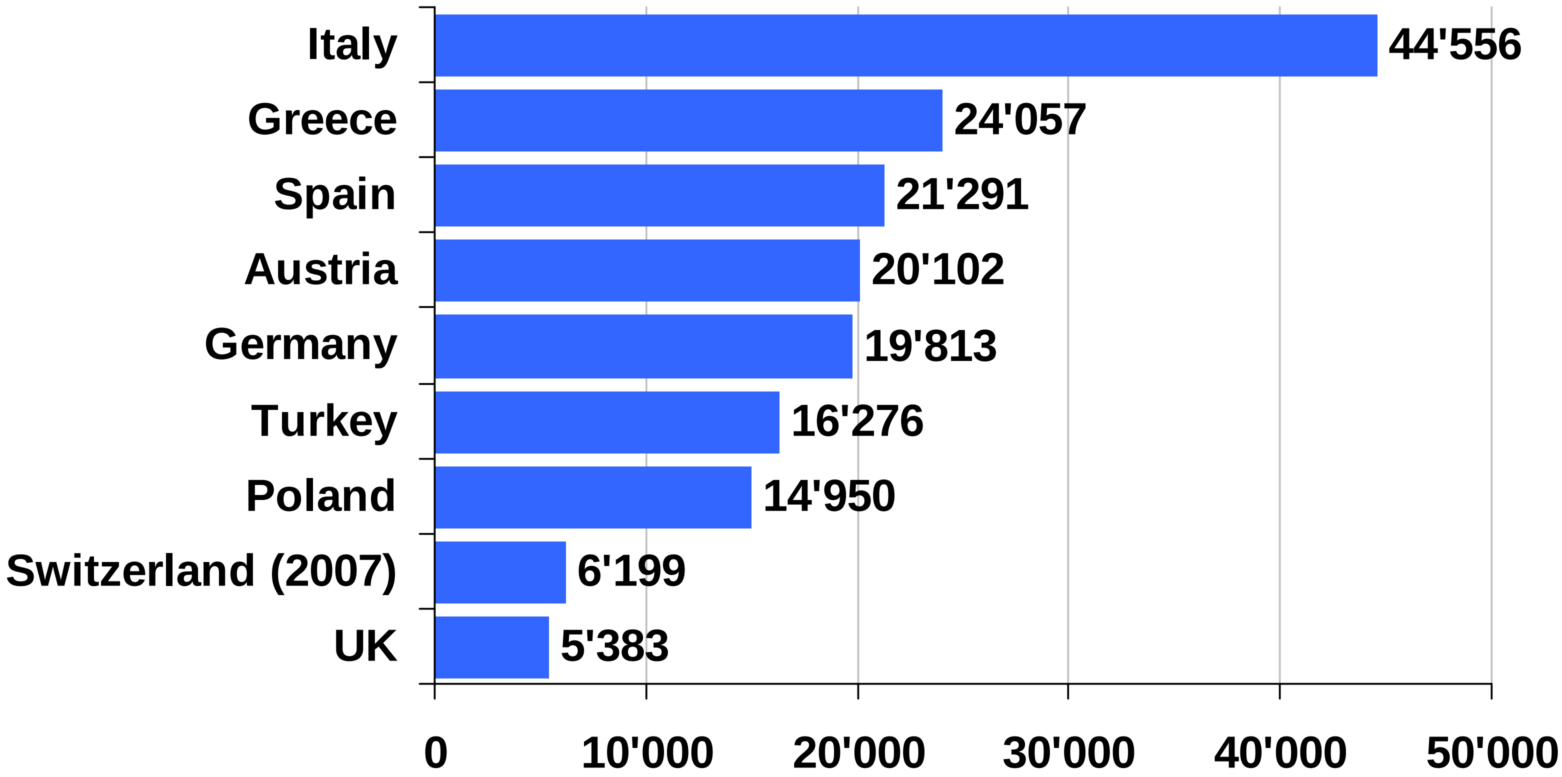

Figure 5: The ten European countries with the largest numbers of organic producers 2008; Survey in progress

Source: FiBL Survey, November 22, 2009. For data sources see end of this document

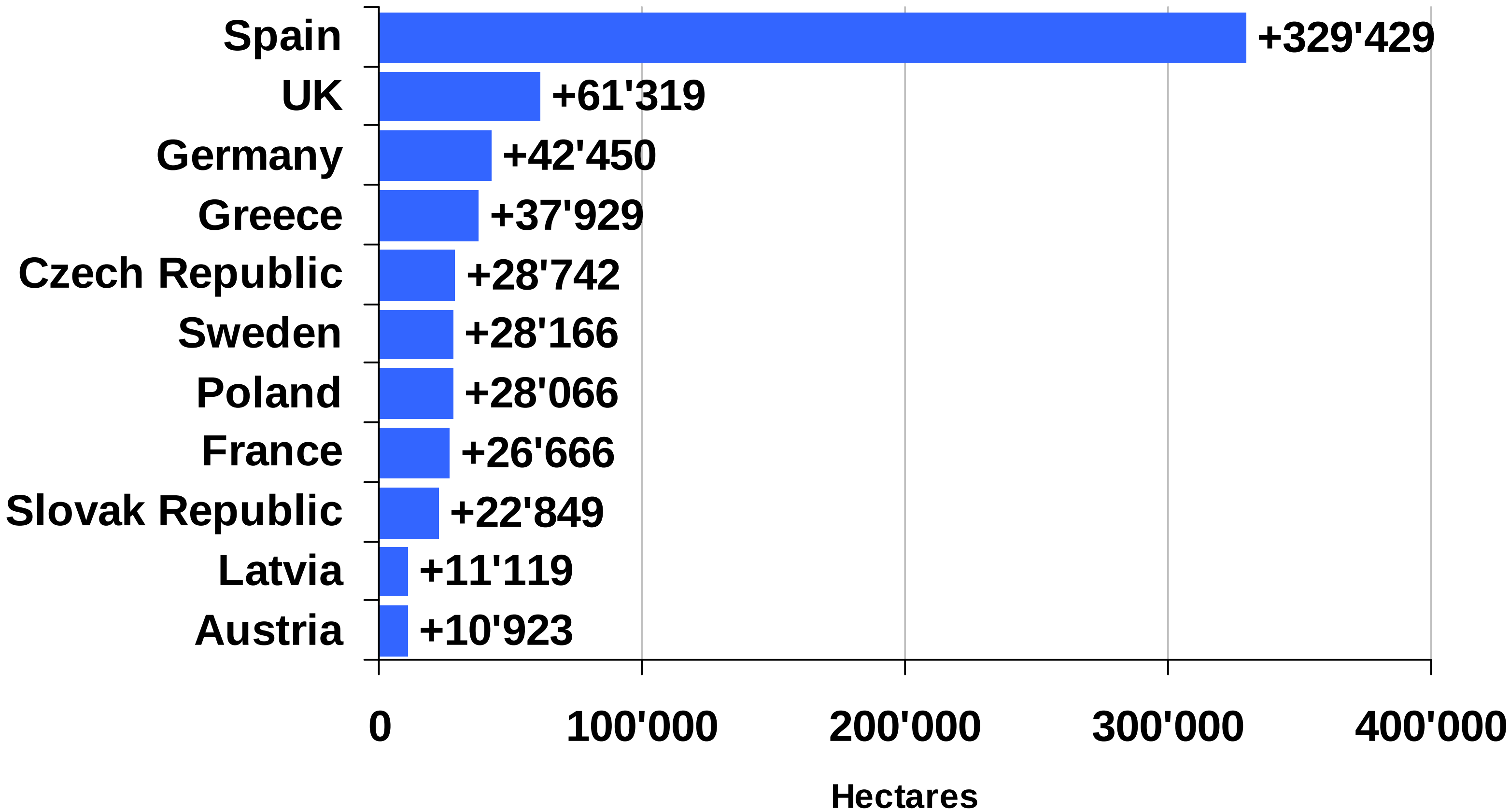

Figure 6: The ten European countries with the highest increase (hectares) of organic land 2007 to 2008; Survey in progress

Source: FiBL Survey. For data sources see end of this document

Spain: Wild collection included

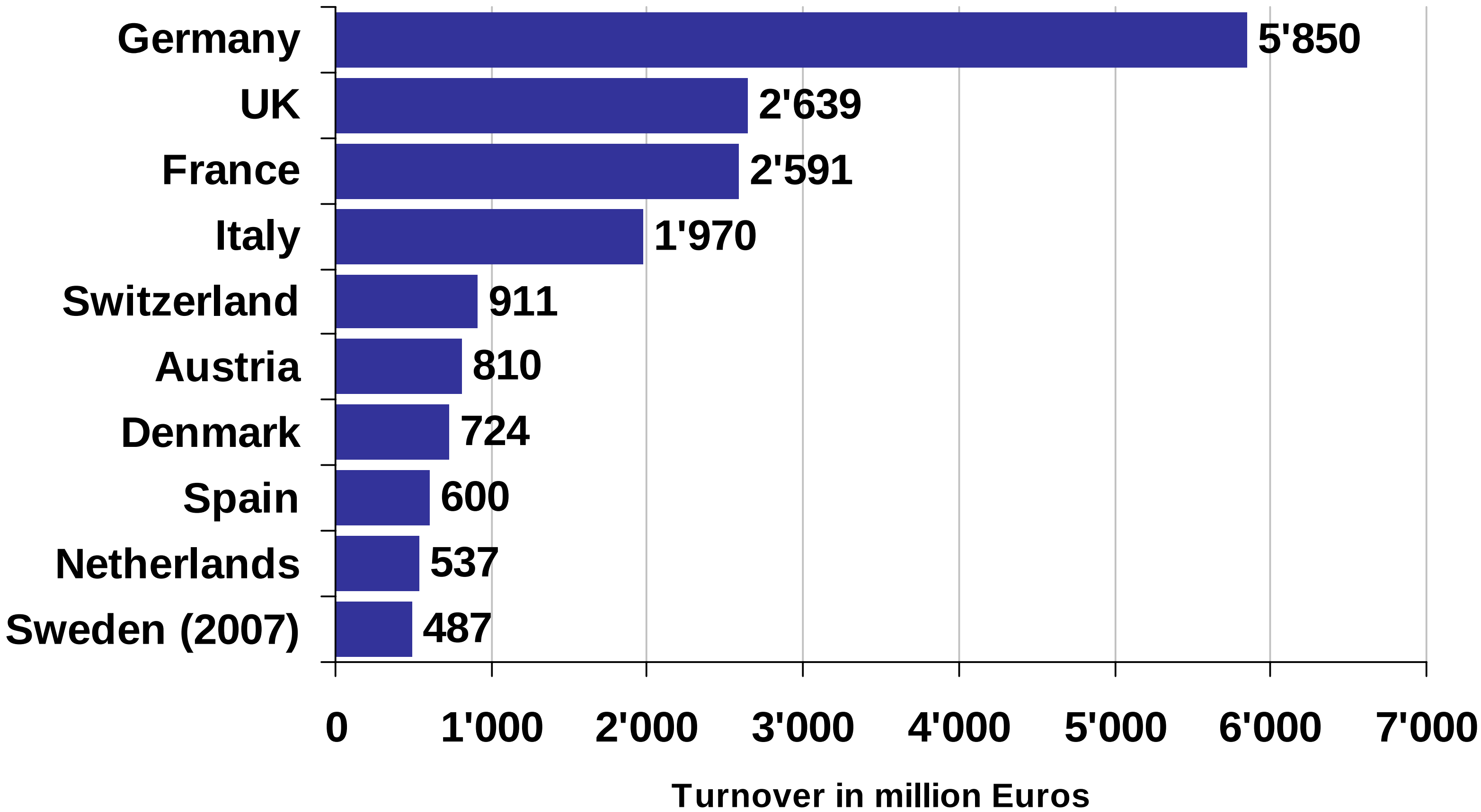

Figure 7: The ten European countries with the largest markets for organic food 2008; survey in progress

Source: FiBL Survey. For data sources see end of this document.

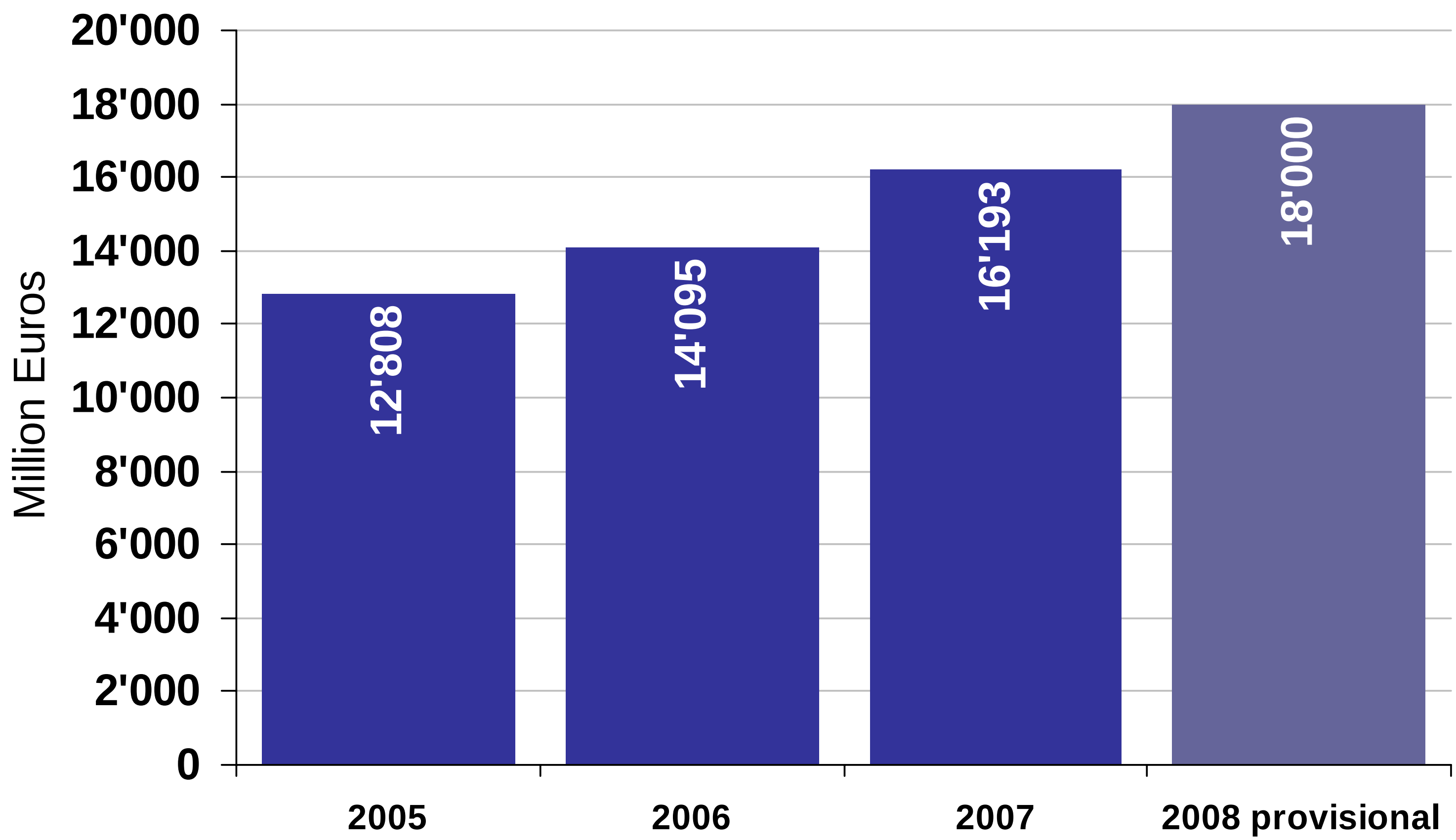

Figure 8: Growth of the European market for organic food 2005-2008

Source: Surveys by FiBL, Aberystwyth University and ZMP/AMI

Data Sources

Albania:
- Sasa, Tirana, Albania

Austria
- Land area/producers: Eurostat and Grüner Bericht, Lebensministerium, Vienna
- Market data: FiBL Austria, Bio Austria

Belgium:
- All data: Bioforum Flanderen, Antwerp, Belgium

Bosnia and Herzegovina:
- Source: Organska Kontrola (OK), Sarajevo. Bosnia & Herzegovina

Bulgaria
- Land area/producers: Eurostat
- Market data: Stoilko Apostolov, Bioselena, Karlovo, Bulgaria

Czech Republic
- Land area/producers: Ministry of Agriculture of the Czech Republic
- Market data: Green Marketing, Source: Ministry of Agriculture, CZ-Prague

Denmark
- Land area and producers: Eurostat
- Market data: Statistics Denmark and Organic Denmark

Estonia
- Land area and producers: Eurostat Organic Farming tables
- Market data: provided by the Estonian Organic Farming Foundation

Finland
- Land area / producers: Eurostat
- Market data provided by Organic Food Finland

France: All data from Agence Bio

Germany:
- Land area and producers: Eurostat
- Market data: University of Kassel, Agromilagro research

Greece:
- Land area: Eurostat
- Market data: Ekonzept

Hungary
- Land area: Eurostat
- Market data: Ekonzept

Iceland: Vottunarstofan Tún ehf., Iceland

Ireland
- Land area/producers: Department of Agriculture DAFF
- Market Data: Board Bia

Italy
- Land area: Eurostat/SINAB; producers: SINAB
- Market data: ISMEA, Rome, Italy

Latvia:
- Land area/Producers: Eurostat

Liechtenstein
- All data: Klaus Büchel Anstalt, Mauren, Liechtenstein
- Lithuania
- Land area/producers. Eurostat

Luxembourg:
- Land area: Administration des services techniques de l'agriculture (ASTA), Luxemburg
- Market data: Ekonzept

Macedonia: PROBIO and Balkan Biocert Skopje, Macedonia FYROM
- Malta: Genista Foundation

Moldova: Ekoconnect, Dresden, Germany
- Netherlands, Biologica, Utrecht, The Netherlands

Norway
- Land area/producers: Eurostat

Market data: SLF

Poland
- Land area: Eurostat
- Market data: Ekonzept, Montpellier, France

Portugal
- Ministry of Agriculture/Eurostat
- Market data: Ekonzept, Montpellier, France

Romania
- Land area/producers: Eurostat
- Market data: Ekonzept, Montpellier, France

Russian Federation (European part)
- Source/Data provided by Eco Control, Russia and international certifiers

Serbia
- Data provided by / Source: Ministry of Agriculture, Forestry, and Water Management. Belgrade

Slovak Republic:
- Land area/producers: Eurostat
- Market data: Ekonzept, Montpellier, France

Slovenia
- Land area/producers: Eurostat
- Market data: Ekonzept, Montpellier, France

Spain
- Land area/producers: Ministry of Agriculture, MAPA, Madrid, Spain
- Market data: Ekonzept, Montpellier, France

Switzerland
- Land area/producers: Bundesamt für Statistik BfS; Neuchâtel, Switzerland
- Market data: Bio Suisse

Turkey
- All data: Ministry of Agriculture MARA: Source Ministry of Agriculture MARA

UK
- Land area: Defra; producers: Eurostat
- Market data: Soil Association

Ukraine
- All data: Organic Federation of Ukraine, Kiev, Ukraine