European Commission

"The future Organic Regulation"

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THE EU ORGANIC FARMING (R)EVOLUTION

The EU organic logo. Look out for it!

European Commission

ORGANIC PRODUCTION IS ON THE INCREASE

Total area cultivated as organic

2002 5.6 MILLION HECTARES

2014 10.3 MILLION HECTARES

+ 400 000 hectares/year
Expansion of the organic area every year over the last decade

5.9 % (2014)
Area of organic farmland as a percentage of utilised agricultural area in Europe

TOP 5 COUNTRIES FOR ORGANIC FARMING

EU countries with the highest proportions of organically farmed land:

AUSTRIA 19.3%

SWEDEN 16.5%

ESTONIA 16.3%

CZECH REPUBLIC 13.5%

ITALY 11.5%

DID YOU KNOW
There were 3.6 million heads of certified organic cattle in the EU in 2014.

TOP 5 COUNTRIES WITH THE LARGEST AREA FOR ORGANIC FARMING

In absolute terms, in 2014 the largest areas of organic farming land were in:

TOGETHER these countries account for 57 % of the total organic area of the European Union.

SPAIN 1.71 MILLION HECTARES

ITALY 1.38 MILLION HECTARES

FRANCE 1.12 MILLION HECTARES

GERMANY 1.03 MILLION HECTARES

POLAND 0.66 MILLION HECTARES

TOP ORGANIC CROPS

Which permanent crops are organic farmers growing? % of EU total area:

OLIVES 35 %

OTHER FRUIT 10 %

CITRUS FRUIT 3 %

GRAPES 21 %

NUTS 13 %

OTHER PERMANENT CROPS 18 %

THE SOCIO-ECONOMICS OF ORGANIC FARMING

More than **255 000** organic producers were registered in the European Union in 2014.

CONSUMER VALUE
of EU market for organic food products 24 billion euro in 2014

GROWTH RATE
7.4% from 2013 to 2014

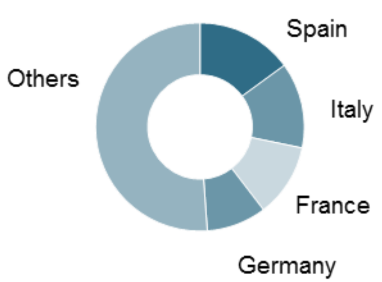
GENDER WOMEN MAKE UP 22% OF ORGANIC FARM MANAGERS.
In some countries this is higher:
Latvia **41 %** Lithuania **33 %** Austria **31 %**

AGE FARMERS UNDER 55
Working in the organic farming sector **66 %**
Working in the conventional farming sector **44 %**

EUROPE: ORGANIC FARMLAND 2016

Europe
13.5
Million ha

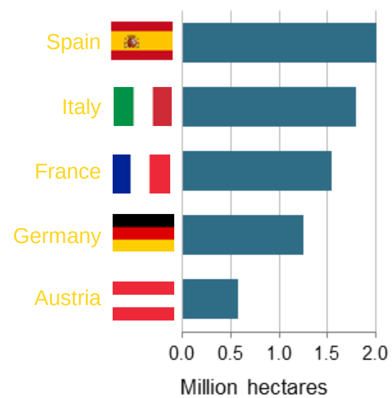
Half of Europe´s organic farmland is in 4 countries.



Distribution of organic agricultural land by country 2016

Spain
2.02
Million ha

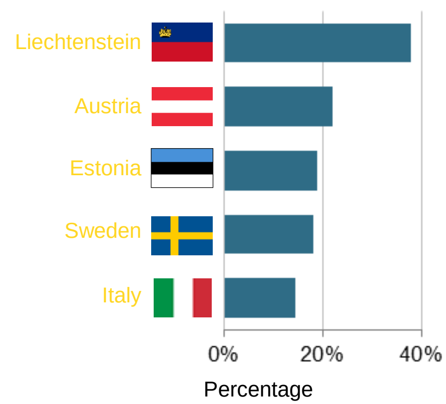
The country with the largest area of organic farmland is in Spain, followed by Italy and France.



Top 5 countries with the largest areas of organic agricultural land 2016

2.7%
of Europe s farmland is organic
(EU 6.7%)

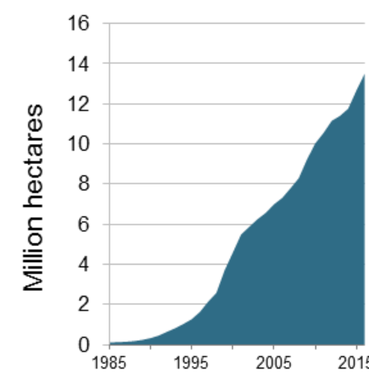
Nine countries have 10% or more of their agricultural land under organic management.



Top 5 countries , where more than
10 percent of the farmland is organic 2016

+73%
in the decade
2007-2016

In 2016, almost 0.85 million hectares more were reported compared with 2015.



Growth of the organic agricultural land 1985–2016

Source: FiBL survey 2018 www.organic-world.net

EUROPE: ORGANIC RETAIL SALES 2016

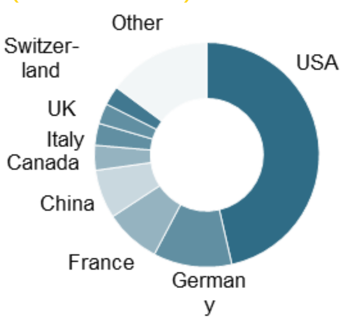
Europe
33.5 billion €

Germany
9.5 billion €

274 €
are spent per person in Switzerland

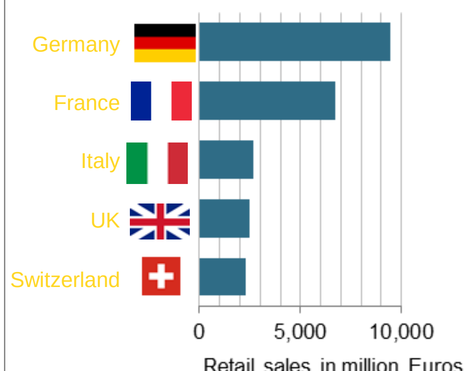
9.7 %
of the food market in Denmark is organic

The European Union (30.7 billion €) is the second largest single market after the US (38.9 billion) and China.
By region, North America has the lead (41.9 billion €), followed by Europe (33.5 billion €) and Asia.



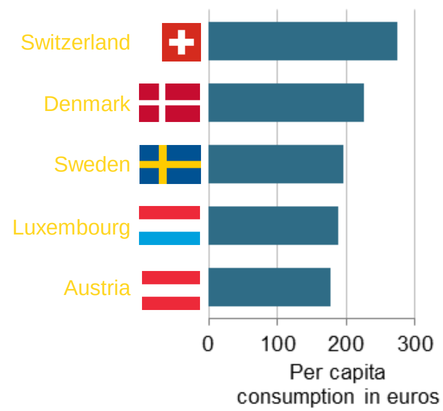
Distribution of retail sales value worldwide by country 2016

The European countries with the largest markets for organic food are Germany (9.5 billion €), France (6.7 billion €), Italy (2.6 billion €), and the UK (2.5 billion €).



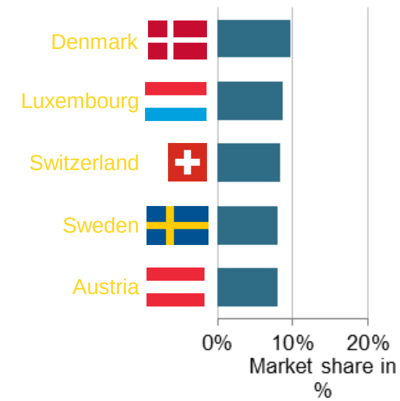
The countries with the largest markets for organic food 2016

Switzerland has the highest per capita consumption of organic food worldwide, followed by Denmark and Sweden.



The countries with the highest per capita consumption of organic food 2016

The highest organic share of the total market is in Denmark, followed by Luxembourg, Switzerland, Sweden, and Austria.



The countries with the highest organic shares of the total market 2016

Source: FiBL survey 2018 www.organic-world.net

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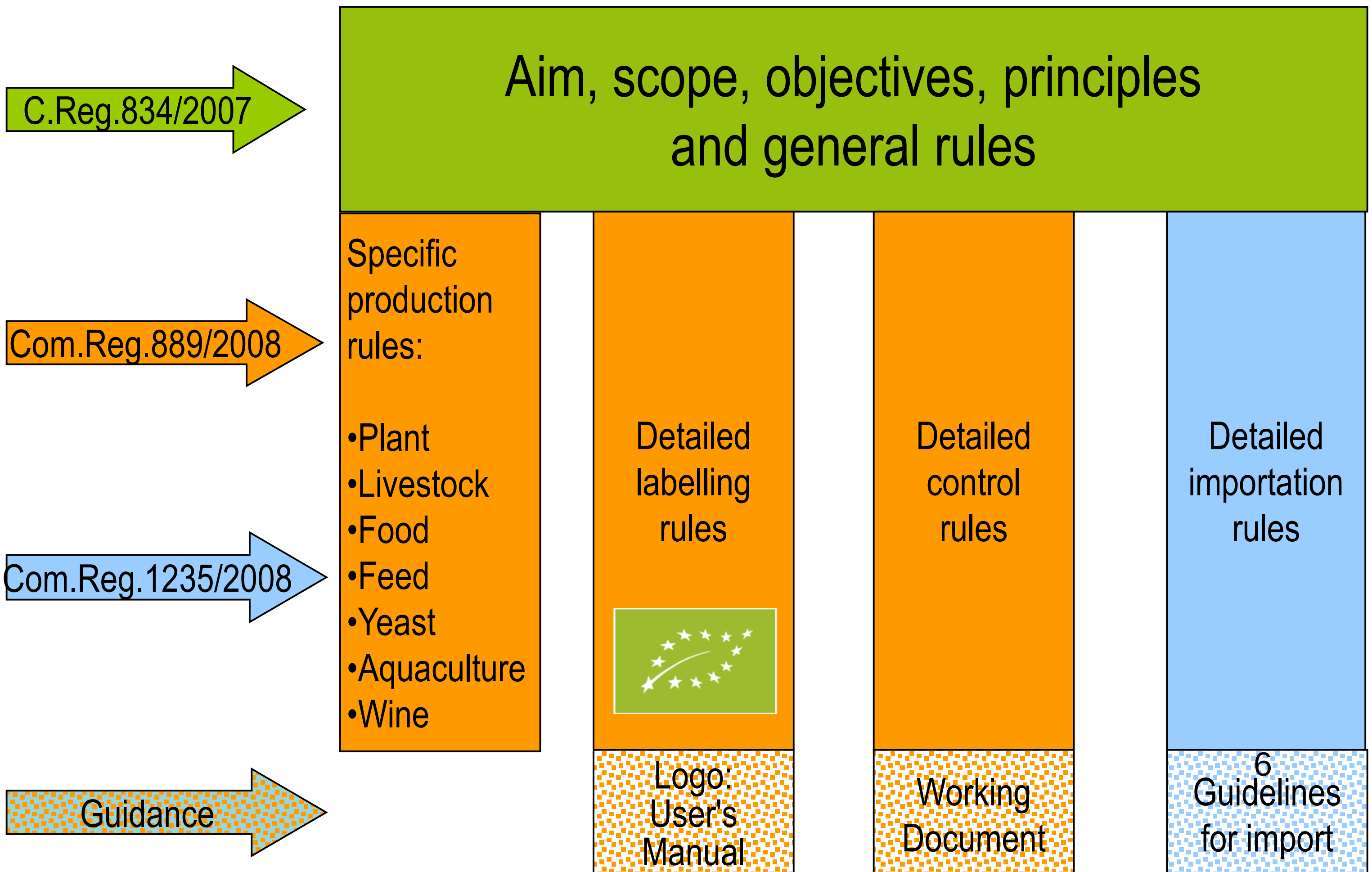
EU legislation on organic farming

1991	→ plant production rules	(Reg. 2092/91)
1999	→ livestock production rules → production rules for processed food → equivalence with 7 third countries	
2007	→ revision of the Council regulation	(Reg. 834/2007)
2008	→ new implementing rules → new implementing rules for import	(Reg. 889/2008) (Reg. 1235/2008)
2009	→ production rules for yeast, aquaculture, seaweeds → equivalence with Tunisia	
2010	→ new EU organic logo → equivalence with Japan	
2011	→ equivalence with Canada & first list of equivalent CBs	
2012	→ equivalence agreement with US → production rules for organic wine	
2014	→ adoption of organic production review package	
2015	→ equivalence agreement with KOREA	

EU legislation on organic farming



Why a new regulation?

- ***Incredible growth of the sector- no more a niche market***
- ***Certain provisions are 20 years old, did not forsee the incredible development of the organic sector.***
- ***Many gray areas; growing number of requests for the legal interpretations of certain provisions.***
- ***Too many derogations granted on a case-by-case basis; too many discrepencies on the application of the rules between Member States.***
- ***Increasing risk of formal complaints being introduced by some operators against unfair competition.***
- ***Current regulation not in line with the Lisbon treaty.***

The organic reform: the past

March 2014	June 2015	Oct. 2015	Nov.20 15	June 2017	Nov. 2017
Com. proposal	EU Council "General Approach"	Amendments voted in EP plenary	Beginning of the trilogues	Political compromise	Endorsement by the Special Committee Agriculture and vote COMAGRI EP

The organic reform: the future

March 2018*	April 2018*	May 2018*	1 January 2021
End of linguistic review	Vote in EP plenary	Adoption in the Council. Publication in the OJ	**Date of entry into application**

* Estimated date

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Why the reform took so long ?

- ***Wide varieties of views and positions between the three European Institutions, Member States and within the sector.***

- ***Several issues on which it was difficult to find an acceptable compromise for all parties: pesticides, controls, cultivation in greenhouses using demarcated beds.***

- ***Final outcome: balanced compromise between fundamental principles of organic production maintaining certain flexibility for operators.***

Added value of the new Organic Regulation

***Harmonisation*:**

- ***end of à la carte derogations;***
- ***level playing field for organic producer, within the EU and vis-à-vis third countries (compliance);***

***Simplification*:**

- ***group certification for small producers reducing certification costs and administrative burden;***
- ***risk based controls aiming to reduce administrative burden.***

Moreover…

Clarification:

- ***end of grey area in the control system;***
- ***a robust control system with clearer rules;***
- ***definitions.***

Production rules

- ***Harmonisation of certain provision: parallel farming, authorisation of substances.***
- ***Organic heterogeneous material (higher genetic variability for a better adaptation to different agronomic realities)***
- ***Clarification of the status of greenhouses: creation of a transitional period for certain Countries.***
- ***Simplification of the rules on livestock production: for instance simultaneous conversion (land + animals)***
- ***New rules for for example: rabbits***
- ***Introduction of new products and possibility to extend the scope to new products.***

Control rules

- ***Organic farming is explicitly part of the scope of the new EU Official Food and Feed Control Regulation.***
- ***Principle of the annual control maintained: still possibility for MS to define a risk profile to possibly exempt operators from on the physical on-the-spot .***
- ***Group certification for small operators.***
- ***Control on retailers for unpacked products.***

Processing

- ***Clarification baby food rules.***
- ***New provisions on the authorisation of non-organic ingredients of agricultural origin.***

Database and end of derogations

MS to set up a data base for seeds and a "system" for livestock.

Opportunity to create a market of organic reproductive material.

Possibility for the Commission for extending the duration of derogations

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Trade

- ***Provisions for the exports of organic products***
- ***Compliance, specific provision for substances***
- ***Reinforced powers in relation to CB and goods***
- ***Current arrangements => bilateral trade agreement***

Work Plan. Two objectives:

- ***Ensure a smooth implementation of the current rules for the next three years***
- ***Prepare a planning for the IA and DA aiming to have all needed legal provisions in force approximately 6 months before 1 January 2021***

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https://ec.europa.eu/agriculture/organic/index_en