European Commission

EU Agricultural Markets *Briefs*

No 3 | July 2014

The rapid growth of EU organic farming

Key facts and figures

Contents

You have certainly heard about food products which are 'organic', being produced with minimal impact on the environment and through an agricultural system which operates as naturally as possible. To achieve this, legislation in the EU sets a number of standards concerning the protection of natural resources, the use of chemicals (pesticides, fertiliser or animal medication) as well as the protection of animal welfare, among others. The use of Genetically Modified Organisms (GMOs) is also prohibited in organic production. Put simply, organic farming is an agricultural system which seeks to provide consumers with fresh, tasty and authentic food while respecting natural life-cycle systems. You can easily recognize organic products originating in the EU through the logo below.

But how has this sector developed in the EU and what do we know about farmers in organic production? This *Brief* gives a picture of organic farming in the EU, covering the current situation of organic areas, holdings and production as well as some characteristics of organic farms (size and information on farm managers), on the basis of Eurostat data.

Source: http://ec.europa.eu/agriculture/organic/eu-policy/logo_en

This *Brief* is based on the Facts and Figures on Organic Agriculture in the European Union report (referred to as 'the Organic farming report'). The data caveats of the Organic farming report apply to corresponding graphs and tables presented in the *Brief*.

EU Agricultural Markets Briefs are available in Europa:
http://ec.europa.eu/agriculture/markets-and-prices/market-briefs/index_en.htm

Agriculture and Rural Development

1. EU organic farming in a nutshell

The organic sector in the EU has been rapidly growing in the past years.

In 2011, the EU-27 had a total area of 9.6 million hectares cultivated according to organic farming rules, up from 5.7 million in 2002. During the last decade, the organic area in the EU increased by about 500 000 hectares each year. This is a significant increase, although the whole organic area represents only 5.4% of the total utilised agricultural area in the EU.

In 2010 there were more than 186 000 organic farms across the EU. On average, organic holdings tend to be bigger than conventional farms. Most of organic farms (83%) and organic land (78%) are situated in the EU-15[1] (the EU Member States that joined the EU before 2004) where national and European legislation, among others, helped stimulate the development of this sector. The countries that joined the EU since 2004 (further called the EU-N12[2] and not including Croatia) are quickly expanding their organic sector as well: they registered a 13% yearly growth rate in their organic area from 2002 to 2011 and saw their number of holdings increase almost tenfold between 2003 and 2010.

Data on organic farm managers shows that they tend to be generally younger than the average conventional farmers in the EU. In 2010, farmers younger than 55 represented 61.3% of the total in the organic sector but only 44.2% in non-organic agriculture.

Organic production patterns vary between EU Member States. However, across the EU, permanent pasture accounts for the biggest share of the organic area (about 45%) followed by cereals (around 15%) and permanent crops (about 13%). Organic animal production remains limited in comparison with the total animal production in the EU (about 1%).

Despite its expansion, a complete picture of the organic sector at this point in time is unavailable, due to insufficient data on certain aspects of organic production and of the organic food chain (in particular sales and trade).

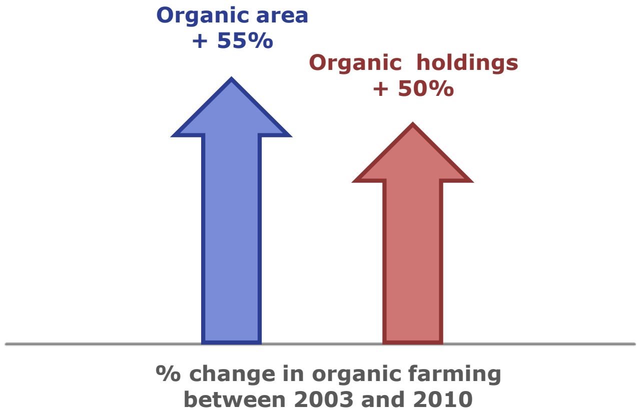
[1] EU-15 includes EU Member States in 2003: Belgium, Denmark, Germany, Ireland, Greece, Spain, France, Italy, Luxembourg, the Netherlands, Austria, Portugal, Finland, Sweden and the United Kingdom.

[2] EU-N12 includes the Members States that joined the EU in 2004: the Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Slovenia and Slovakia, and in 2007: Bulgaria and Romania.

2. A closer look at organic farming: area and holdings are on the rise

In the last decade, both the number of holdings and area under organic agriculture in the EU-27 grew by 50% or more.

Graph 1 Growth in organic area and holdings in the EU-27



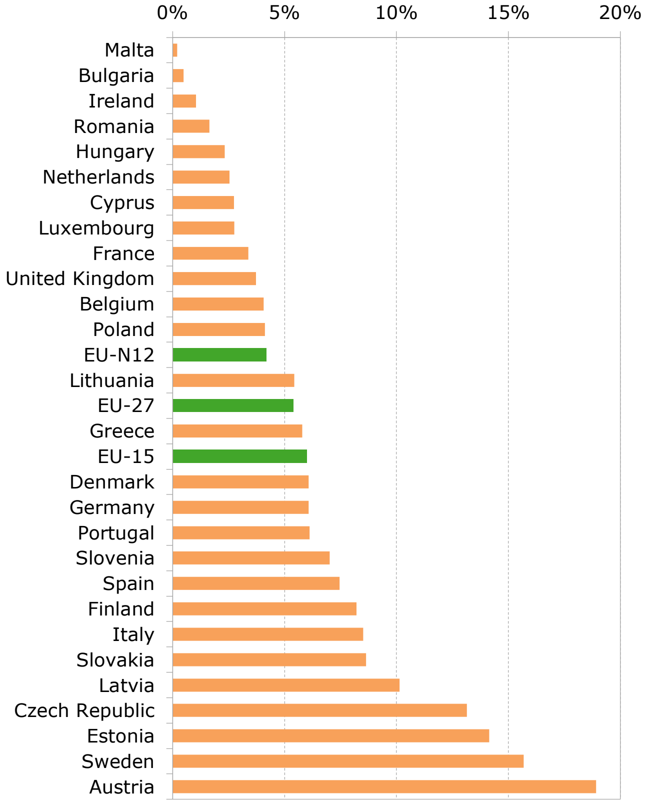
Source: Eurostat, FSS. See also Graphs 1 and 8 of the Organic farming report.

Available data shows that **the EU-15 still holds the majority of organic area and organic farms, although the development of this sector has been faster in the EU-N12 countries:**

- the organic area grew faster in the EU-N12 (+13% per year between 2002 and 2011, jumping from 0.6 to 2.1 million ha) than in the EU-15, where the organic area went up by a 5% yearly average during the same period. Nonetheless, despite the strong growth of the sector in the EU-N12 the majority of organic area in Europe remains in the EU-15 (78% of the total in 2011);
- the number of organic farms increased four-fold between 2003 and 2005 in the EU-N12 and reached over 31 900 holdings in 2010. Though growth has been more reduced for the EU-15 (+27% between 2003 and 2010), the biggest number of organic farms –namely 154 260 holdings, or 83% of the total– are situated in these Member States.

But these positive figures tell only part of the story. When compared to the total utilised agricultural area (UAA), the **organic area represents only a small portion: 5.4% of total UAA in 2011**, having increased from 3.1% in 2002. This share also differs from one Member State to another and varied from about 19% in Austria to 0.2% in Malta in 2011.

Graph 2 Organic area as share of UAA in the EU Member States (%), 2011



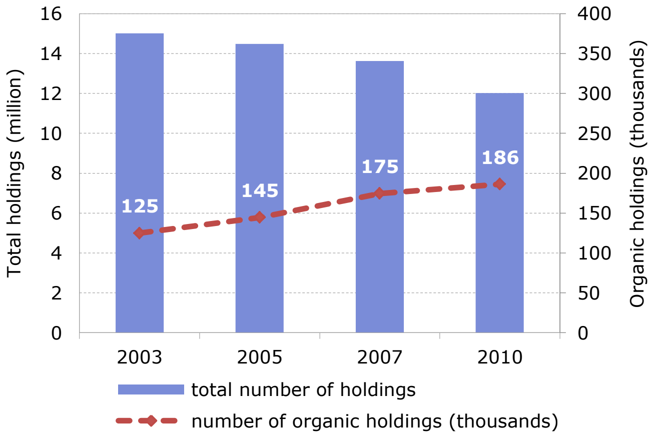
Source: Eurostat. See also Graph 4 of the Organic farming report.

Organic holdings (186 250 in 2010) also represented only a small share (1.6%) of the total number of farms in the EU-27 (3% in the EU-15 and 0.5% in the EU-N12).

But although organic area and holdings make up for a small share of total area and holdings at EU level, **their number has been growing fast during the last ten years. This evolution is also opposite to structural change in conventional agriculture**, in which the number of farms and workers has been declining for decades (see Graph 3 on next page).

Statistics on organic farming show as well that aside from gaining more holdings, the organic sector seems to be attracting an increasing number of working units and producers. More than 270 000 organic operators (producers, processors and importers) were registered in the EU-27 in 2011. A good part of these operators (about 235 000 in the quoted year) were represented by agricultural producers, who may also process and/or import organic products.

Graph 3 Trends in organic and conventional holdings in the EU-27

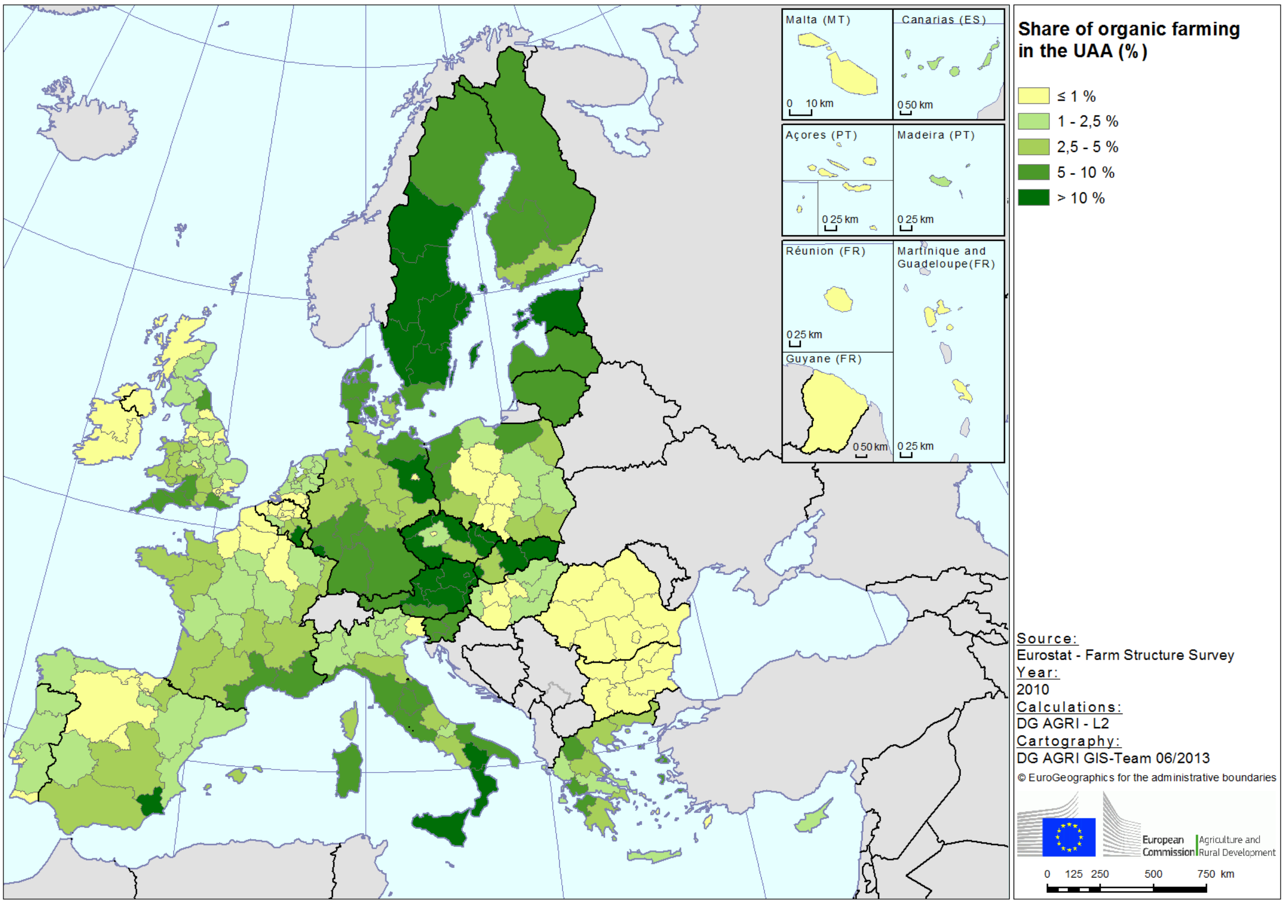


Source: Eurostat, FSS. See also Graph 11 of the [Organic farming report](#).

Data at regional level shows a more heterogeneous picture. The organic area is above 10% of total UAA in southern Sweden, Estonia, Austria (with the exception of Tirol and Kärnten), centre and East Slovakia and the Czech Republic (except the Prague Region, Strední Cechy and Jilhovýchod). For regions such as Brandenburg in Germany, Sicily and Calabria in Italy as well as the Spanish province of Murcia similar values are registered. The lowest shares of organic farming in total UAA (less than 1%) are registered in Romania, Bulgaria, Ireland, northern France, Castilla y León and other small regions in Spain, the Flemish part of Belgium as well as some Polish regions.

Map 1 also reflects the fact that organic farming is particularly significant in regions with extensive livestock production systems, based on permanent grassland. The importance of the organic sector is generally lower in the regions of plains where more intensive production systems prevail.

Map 1 Share of organic area in total utilized agricultural area (UAA) at regional level, 2010



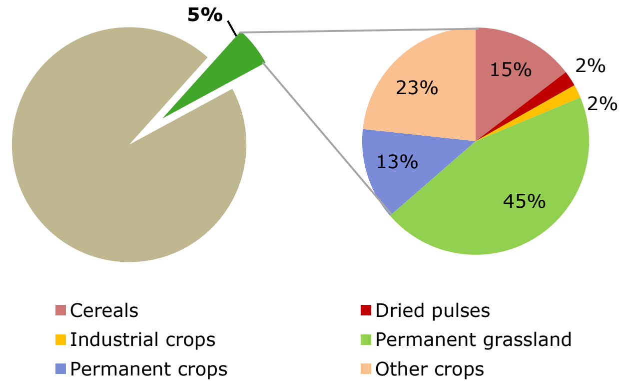
Source: Eurostat, FSS. See also Map 1 of the [Organic farming report](#).

3. A closer look at organic farming: what kind of organic production in the EU?

The choice of the type of organic production (arable crop and orchard as well as animal) differs among regions and Member States and depends on various factors (such as the technical aspects related to organic production and the structure of consumer demand).

In the EU, **organic arable crop and orchard production** is important. Though data is scarce on all categories of this type of production, Graph 4 gives an idea of main types of land use for organic arable crop and orchard production in the EU-27 in 2011. The biggest share of organic land is used for permanent grasslands but also for cereals and permanent crops (such as fruit).

Graph 4 Land use organic crops and % of total, EU-27, 2011

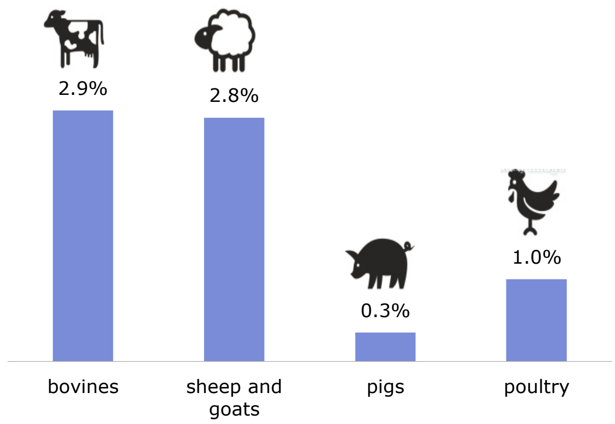


Source: Eurostat. See also Table 6 of the Organic farming report.

When looking at organic in comparison to total area in the EU, available data on land use for 2011 shows that 16% of the area for all dried pulses and 11% of the total area for permanent crops are. The share of permanent crops is higher in the organic sector (13%) than in the whole EU agriculture (6%) as the demand for fruit and vegetables is among the biggest on the organic market. Another significant element is the share of permanent grassland in total agricultural area, which amounts to one third for the EU-27 but represents about half of the whole organic area.

Statistics on the number of **organic animals** are incomplete and give only a partial picture of the sector. However, taking into account available information, the EU organic animal sector seems to be developing at a fast pace as well. Despite this evolution, organic animal production still remains limited in comparison with the total animal production in the EU (about 1%). In 2010, organic bovines as well as sheep and goats represented about 3% each of the EU-27 animal herd.

Graph 5 Share of organic out of total animal herd in the EU-27, 2010



Source: Eurostat, FSS. See also Table 9 of the Organic farming report.

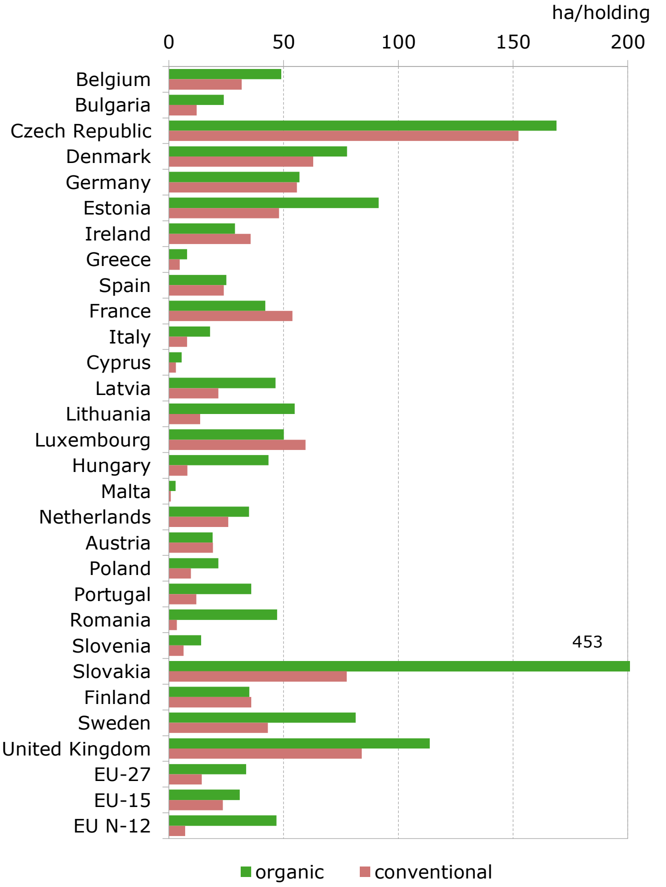
The pork sector has the lowest weight in total production. This stems partly from the difficulties related with the provision of organic animal feed (compound feed).

4. Organic farms are bigger and their managers younger

Organic farms are bigger than conventional ones: 34 ha on average for the organic holdings while all EU farms count an average of 14 ha. If for the EU-27 about 48% of total holdings have a size lower than 2 ha, only 6.2% of organic farms are situated in this category.

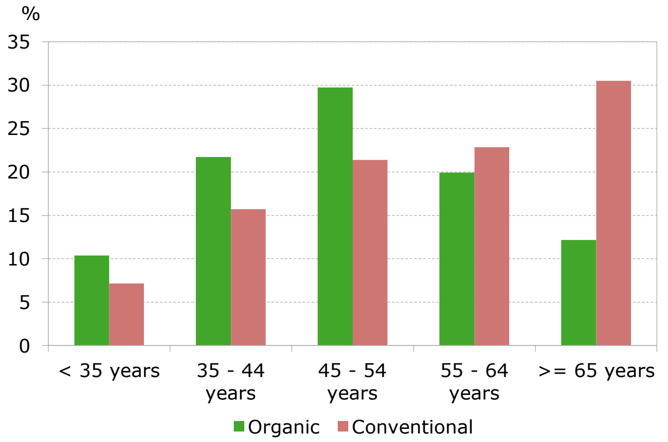
Graph 6 shows how the area of organic farms varies significantly across Member States. In 2010, the largest organic holdings were located in Slovakia (average total area of 453 ha/holding), the Czech Republic (169 ha/holding) and the United Kingdom (114 ha/holding) while the smallest organic farms were found in Malta (3 ha/holding), Cyprus (6 ha/holding) and Greece (8 ha/holding). From among the EU-N12, besides Slovakia and the Czech Republic already mentioned, figures for Estonia, Lithuania and Romania show the biggest areas per organic holding.

Graph 6 Average surface of organic holdings, 2010



Source: Eurostat, FSS. See also Graph 15 of the [Organic farming report](#).

Graph 7 Age distribution of farm managers in the organic and non-organic sector, EU-27, 2010



Source: Eurostat, FSS. See also Graph 17 of the [Organic farming report](#).

If organic farms are on average larger than non-organic farms, **their managers are also younger**. In the EU-27, the age distribution of farms managers is strikingly different in organic and non-organic agriculture: farmers younger than 55 represented 61.3% of the total in the organic sector, while they represented only 44.2% of the total in non-organic agriculture in 2010.

Organic farming in Croatia

The European Union's newest Member State is also active in organic farming. In 2010, Croatia registered 880 organic farms (about 0.3% of its total holdings), of which 310 farms were in-conversion. The country counted about 9 000 ha of certified organic land and more than 10 900 ha of hectares under conversion, but total organic area (converted and in-conversion) amounted to just 1.5% of total UAA.

On 7 240 ha of organic land Croatia cultivated cereals, while 2 180 ha were dedicated to oil crops. There were 4 110 ha of organic pasture and meadows (excluding rough grazing), while organic fruit and berries were cultivated on a surface of 1 140 ha. 230 holdings were active in the production of organic olives on an area of 500 ha. Organic vineyards occupied 240 ha managed by an overall of 100 holdings.

In organic animal production, Croatia owned 8 250 bovine heads, 340 pig heads and 11 440 sheep and goats.

5. Conclusions

Though cultivated area occupies only 5.4% of the total UAA, organic farming in Europe has rapidly developed in the past years. This increase characterises not only the area under organic farming, but also the number of holdings and organic operators registered in the EU-27. Though a good part of the number of holdings and area is still situated in the EU-15, the EU's newest Member States (the EU-N12) have shown positive developments in this respect, in particular in the context of additional financing provided by the EU for this type of production since their accession.

Both animal as well as arable crop and orchard organic production are on an upward trend in the European Union, though they still represent a small share of total production. Organic farms are on the average larger than non-organic farms and their holders younger than those working in non-organic agriculture.

With the reform of the Common Agricultural Policy for 2014-2020, a new legal framework for rural development policy provides payments for the conversion to or for the maintenance of organic farming under a newly created 'Organic farming' measure. This new legal framework aims to encourage farmers' participation in organic farming, thus responding to society's increasing demands for the use of environmentally friendly farm practices and for high animal welfare standards.

Methodological note

This *Brief* is based on the Facts and Figures on Organic Agriculture in the European Union report (quoted as the 'Organic farming report'), drafted on the basis of Eurostat data as well as other information sources. The information is presented for the EU-27, the EU-15 and the EU-N12 country groups (see footnotes 1 and 2 for the list of countries included in the last two groups). The data caveats of the above mentioned report apply to the corresponding graphs and tables presented in this *Brief*.

Data sources

2010 data on agricultural holdings, animals under organic farming, characteristics of farm managers and information on Croatia sources from the **Farm Structure Survey (FSS)**, a Eurostat harmonized data collection which provides statistical information on the structure of agricultural holdings collected through agricultural structure surveys (every three years, last one being 2007) and censuses (every 10 years, last one dating from 2010). Data from the 2003 and 2005 surveys is also used. It has to be noted that the FSS does not cover all holdings (very small farms are not included, the size of these small farms being decided by the Member States) and are not specific for organic farming information.

2002 and **2011 data** on land use are extracted from the **annual data collection** made on the basis of Council Regulation (EC) No 834/2007 **on the organic sector**.

Farm icons: ©Thinkstock

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