Organic Agriculture in Europe: Overview

HELGA WILLER[1]

In 2010, organic land in Europe continued to increase and the organic market grew faster than in 2009. Provisional figures for 2011 indicate that these positive developments have continued. From the research side, there are also positive news: A number of new, important projects are being funded under the European Union's Research Framework programmes and by the network of national funding bodies under the CORE Organic II project.

Current statistics

Production

Organic agricultural land exceeded the ten million hectare mark in 2010: 10'002'087 hectares were under organic agricultural management in Europe, constituting 2.1 percent of the agricultural area. Compared with 2000 (4.5 million hectares), the organic land has more than doubled. Between 2009 and 2010, the area increased by almost 0.8 million hectares or nine percent. In the European Union, there were 9 million hectares in 2010, constituting 5.1 percent of the agricultural land. The country with the largest organic agricultural area is Spain (almost 1.5 million hectares), the country with the most producers is Italy. For more information about the European figures see data tables for Europe, page 228.

In 2010, 41 percent of all organic farmland was used for arable crops (4 million hectares) and 45 percent was grassland (4.5 million hectares), with ten percent (one million hectares) being used to grow permanent crops.[2]

Spain (780'000 hectares), Germany (530'000 hectares) and the United Kingdom (480'000 hectares) have the largest permanent **grassland/grazing areas**. To convert extensively used areas and grassland to organic farming requires relatively few changes in production and few investments. Therefore, the share of grassland is higher in organic farming than in conventional farming, where it accounts for about one third of the agricultural land (Schaack 2010). The key **arable crop** group is cereals: Nineteen percent of the European organic area is cereal production, amounting to 1.7 million hectares in total. Most cereals were grown in Germany (207'000 hectares), Italy (194'00 hectares), and Spain (166'000). Organic vegetables were grown on 112'000 hectares in 2010; key producing countries were Italy (28'000 hectares), the United Kingdom (16'000 hectares) and Germany (12'000 hectares). Ten percent of the organic farmland was used for **permanent crops**; most of this land is olives (367'000 hectares), grapes (192'000 hectares), and nuts (190'000 hectares).

Market

In 2010, the organic market continued to grow in Europe. While some countries such as the UK or Ireland were still affected by the financial crisis leading to stagnation or even decline, the organic market grew significantly in many European countries. First estimates indicate

[1] Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Ackerstrasse, 5070 Frick, Switzerland, www.fibl.org

[2] Figures are rounded, for details please see Table 67.

that in 2011 the European markets grew yet again at a higher rate. The total value of the European organic market in 2010 was approximately 19.6 billion euros and overall growth rate eight percent. The largest markets were Germany, France, the UK, and Italy. The countries with the highest per capita spending were Switzerland, Denmark, and Luxembourg. In all surveyed countries (32 in total), consumers spent on average 28 euros for organic products. For more details see article by Schaack et al. on the European Market in this volume, page 206).

New research project to improve transparency of organic markets

In February 2012, the new European research project "OrganicDataNetwork" (European Data Network for Improved Transparency of Organic Markets) started, and it is expected that this will be a major step forward to improve European market data. The project aims to increase the transparency of the European organic food market through better availability of market information about the sector, thus meeting the needs of policy makers and actors involved in organic markets. This network will closely co-operate with the European Commission, Eurostat and statistical offices of Member States, using existing structures for collecting and processing data on the organic market and stimulating the development of new ones by adapting existing models. The partnership will act as coordinating centre between stakeholders, and will result in a proposal for the establishment of a permanent network to achieve collaboration on statistical issues regarding organic market data.[1]

EU regulation on organic farming and related issues

European logo

Figure 59: European Union: Logo for organic products

Organic farming has had legal protection since the beginning of the 1990s with Council Regulation (EEC) No 2092/91. On July 20, 2007, a completely revised 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," and it came into force on January 1, 2009. The new rules include the mandatory use of the EU organic logo on pre-packaged organic products. The logo can be accompanied by national or private logos. Since July 1, 2010, the organic logo of the EU has been mandatory on all pre-packaged organic products that were produced in any of the EU Member States and meet the necessary standards. The "Euro-leaf" design shows the EU stars in the shape of a leaf against a green background conveying the message: Nature and Europe.

A new ecolabel?

A decision of the European Union on whether an ecolabel should be launched for food, feed and drink products is expected in the first half of 2012. A feasibility study released in 2011 shows that relevant expertise and significant resources are needed before launching an ecolabel for food, feed and drink products in the European Union (EU). It was also found that potential consumer confusion with the organic label would call for awareness building campaigns, requiring additional financial resources. The EU ecolabel is a voluntary scheme

---

[1] Information on this project is available at the website of the European Commission: http://ec.europa.eu/research/bioeconomy/agriculture/projects/organicdatanetwork_en.htm

that forms part of the EU policy to encourage more sustainable consumption and production. To date, criteria for the EU ecolabel scheme has been developed for products in the non-food sector only.

List of control bodies

On December 6, 2011, the European Commission published the first list of control bodies recognised as implementing equivalent organic standards and control measures in third countries (EU regulation 1267/2011). The list includes 30 control bodies from around the world. From July 1, 2012, it will be possible to export products certified by these bodies directly to the European Union. Every year the European Commission will have a deadline of October 31 for application to be submitted by control bodies for recognition.[1] According to the International Organic Accreditation Services (IOAS), this regulation is a significant landmark in the regulation of international trade in organic products.

Government support

In the European Union, the current cycle of the Common Agricultural Policy (CAP)[2] is due to end in 2013. Discussions are now under way to reform the policy for the period 2014 to 2020.[3] Under European Union's agri-environmental programs (Pillar II of the CAP, rural development), support has been granted to organic farming since the beginning of the 1990s. The European Group of the International Federation of Organic Agriculture Movements (IFOAM EU Group) believes that the current CAP needs a fundamental reform.[4] According to the IFOAM EU Group, the CAP reform must respond proactively to the current environmental challenges, ensure the future supply of high quality food through sustainable resource use and play a decisive role in realizing equitable socio-economic development across rural communities.

A further important support measure for organic farming are organic action plans. In 2011, 26 countries and regions in Europe had an action plan (Gonzalvez et al. 2011), many of them with quantitative targets. Austria, for instance, aimed to have 20 percent organically managed agricultural land by the end of 2010—an aim that was almost achieved by mid-2010 when 19.7 percent of the agricultural land was organic. In 2004, the European Action Plan for organic food and farming was launched. The information campaign proposed in the plan (Action 1, a multi-annual EU-wide information and promotion campaign to inform consumers, public institution canteens, schools, and other key actors) was implemented in July 2008. The campaign website offers a wide-range of information on organic agriculture and numerous tools (e.g., pictures, flyers) to support the promotion of organic agriculture.

---

[1] Information and useful links are available at the website of the International Organic Accreditation Service (IOAS) at http://www.ioas.org/euroeq.htm.

[2] Switzerland and Denmark had introduced support schemes already in the 1980s, and in 1989 Germany introduced support for organic farming under what is known as the extensification program. With the EU's agri-environmental programs, this support was extended to all EU countries (since 1992). The type and amount of support provided within this program varies within the different EU Member States. Also, non-EU countries such as Switzerland and Norway have similar support schemes.

[3] Detailed information on the Common Agricultural Policy after 2013 is available at the website of the European Commission at http://ec.europa.eu/agriculture/cap-post-2013/index_en.htm.

[4] Information on the Common Agricultural Policy of the European Union (CAP) and the position of the IFOAM EU Group is available at http://www.ifoam.org/about_ifoam/around_world/eu_group-new/workareas/policy/php/CAP.php

Research

Today, organic farming research is substantially funded under national research programs or national organic action plans, as well as through European projects.[1] 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[2] amounted to more than 60 million euros in 2006 (Lange et al. 2007). Newer data are not available.

Since the mid-1990s, several organic farming research projects have been funded under the framework programs of the European Commission. Furthermore, there are several European projects that do not have organic farming as their focus but carried out research related to organic farming in the framework of individual work packages. In the Seventh Framework Programme, launched in 2008, currently eight projects focusing on organic farming that are being funded. Below is a list with the main projects:

- OrganicDatanetWork: Data network for better European organic market information (starting 2012)
- Co-Free: Innovative strategies for copper-free low input and organic farming systems (starting 2012)
- SOILIBAM - Strategies for organic and low-input integrated breeding and management (www.solibam.eu)
- CERTCOST (www.certcost.eu): Economic analysis of certification systems for organic food and farming;
- LowInputBreeds (www.lowinputbreeds.org): 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) (ww.ecropolis.eu): Documentation of sensory properties through testing and consumer research for the organic industry (www.ecropolis.eu);
- Indicators for biodiversity in organic and low-input farming systems (BioBio, www.biobio-indicator.wur.nl/UK)
- CORE Organic II - Coordination of European Transnational Research in Organic Food and Farming Systems (www.coreorganic2.org)

CORE Organic II (Coordination of European Transnational Research in Organic Food and Farming Systems) started in April 2010 and it builds on the outcome of the first CORE Organic project —successfully completed in 2007—with the aim of building an effective and sustainable transnational research program. CORE Organic is a network of funding bodies and has 21 partner countries. CORE Organic's goal is to identify common research priorities for the organic sector where a transnational approach gives added value, launch at least two transnational calls, initiate research projects, organize project monitoring and dissemination of results, and to consider funding models. A call for proposals was launched

[1] For a list of projects funded by the European Commission see http://www.organic-research.org/european-projects.html
[2] CORE Organic (Co-ordination of European Transnational Research in Organic Food and Farming); Internet www.coreorganic.org. CORE Organic was a three-year coordination action in organic food and farming (2004 to 2007).
The overall objective was to gather a critical mass and enhance quality, relevance and utilization of resources in European research in organic food and farming.
It is succeeded by the CORE Organic II project.

late summer 2010, and eleven projects were selected, covering three thematic organic research areas: Cropping, monogastric animals and quality.[1] A second call was launched in autumn 2011 with two main focus areas (breeding and market development).

In February 2010 the Strategic Research Agenda (SRA), the second major document of the Technology Platform TP Organics (www.tporganics.eu)2 was finalized, underlining research priorities and a number of suggestions for research projects (Schmid et al. 2009). The Implementation Action Plan explains how the research priorities and research topics, identified in the Strategic Research Agenda, can be implemented. A focus is laid on funding instruments, research methods, and communication of results (Padel et al. 2010). Many of the topics covered in these documents were taken into consideration in recent European calls. Currently, the Technology Platform TP Organics is working on the Education & Innovation Action Plan paper, a guide for education in the field of agriculture. The document establishes the strategic framework to appraise current education projects and subsequently enhance agricultural education outcomes by offering suggestions for improvement.

Successful policy work of the IFOAM EU Group

The European Group of the International Federation of Organic Agriculture Movements (IFOAM EU Group) can look back on another year of successful policy work. The activities of the group are very well documented in its monthly newsletter.[3]

Its work focuses on three areas:

- Regulation - to work on the implementation and evaluation of the EU organic regulation EC 834/2007 according to IFOAM standards;
- Agricultural policy - to achieve an effective European organic action plan and to lobby for a more sustainable Common Agricultural Policy;
- Research – to make lobby work for organic farming research as coordinator of the Technology Platform for organic food and farming and to participate in relevant research projects, especially in the dissemination of results.

The European Organic Congresses of the IFOAM EU Group have now become a tradition. The 5th congress took place in Hungary in May 2011. The next congress of the IFOAM EU Group is organized in cooperation with Organic Denmark. It will take place in Copenhagen, Denmark, April 17-18, 2012. With 200 participants expected, including high-level speakers from the European Commission, the European Parliament and the European organic sector, the 6th European Organic Congress will take place at a crucial point in time for the debate on the future Common Agricultural Policy (CAP).[4]

[1] Information on CORE Organic II is available on www.coreorganic2.org.
[2] On December 2, 2008, the Technology Platform (TP) Organics (www.tporganics.eu) 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 policy-makers. The TP Organic vision paper, published in December 2008, reveals the huge potential of organic food production to mitigate 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).
[3] The newsletter of the IFOAM EU Group is available at
http://www.ifoam.org/about_ifoam/around_world/eu_group-new/positions/newsletters/newsletters.php
[4] Information on the congress is available at http://www.organic-congress-ifoameu.org/

Further reading

European Commission (2010) Commission Regulation (EU) No 271/2010 of 24 March 2010 amending Regulation (EC) No 889/2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007, as regards the organic production logo of the European Union (OJ L 084, 31.03.2010, p.19.) http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:084:0019:0022:EN:PDF. Official Journal of the European Union March 31, 2010.

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 http://eurlex.europa.eu/LexUriServ/site/en/oj/2007/l_189/l_18920070720en00010023.pdf

European Commission (2010): An Analysis of the EU Organic Sector. European Commission, Directorate-General for Agriculture and Rural Development. An analysis of the EU organic sector. Brussels. Available at http://ec.europa.eu/agriculture/analysis/markets/organic_2010_en.pdf

FiBL (2010): European Organic Farming Statistics. The Organic-World.net homepage, FiBL, Frick at www.organic-world.net/statistics.html. Last update August 8, 2010

Janssen, M. and Hamm, U. (2011): Consumer perception of different organic certification schemes in five European countries, Organic Agriculture 1(1):31-43. Available at http://www.springerlink.com/content/51n4h186l7j92g16/fulltext.pdf

Gonzalvez, Victor et al. (2011) Organic Action Plans in Europe. In: Willer, Helga and Kilcher, Lukas (Eds.) (2011) The World of Organic Agriculture - Statistics and Emerging Trends 2011. IFOAM, Bonn; FiBL, Frick

Niggli, U.; Gattinger, A.; Kretzschmar, U.; Landau, B.; Koller, M.; Klocke, P.; Notz, C. and Forster, J. (2011): EHEC – A problem not specific to sustainable agriculture. FiBL - Research Institute of Organic Agriculture, Frick. Archived at http://orgprints.org/18904/

Niggli, Urs; Slabe, Anamarija; Schmid, Otto; Halberg, Niels und Schluter, 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/

Padel, Susanne; Niggli, Urs; Pearce, Bruce; Schlüter, Marco; Schmid, Otto; Cuoco, Eduardo; Willer, Helga; Huber, Machteld; Halberg, Niels and Micheloni, Cristina (2010) Implementation Action Plan for organic food and farming research. Technology Platform TP organics, Brussels.

Schaack, Diana et al. (2011): Development of the Organic Market in Europe. In: Willer, Helga and Kilcher, Lukas (Eds.) (2011) The World of Organic Agriculture - Statistics and Emerging Trends 2001. IFOAM, Bonn; FiBL, Frick

Schmid, Otto; Padel, Susanne; Halberg, Niels; Huber, Machteld; Darnhofer, Ika; Micheloni, Cristina; Koopmans, Chris; Bügel, Susanne; Stopes, Christopher; Willer, Helga; Schlüter, Marco and Cuoco, Eduardo (2009) Strategic Research Agenda for organic food and farming. TP Organics, Brussels.

Van Osch et al. (2008): Specialised Organic Retail Report. Practical Compendium of the Organic Market in 27 European Countries. ORA, Vienna, EKOZEPT, Montpellier/Freising, Biovista, Ettlingen

Websites

- ec.europa.eu/agriculture/cap-post-2013 : Webpages of the European Commission on the CAP reform
- www.ifoam-eu.org: European Union Group of the International Federation of Organic Agriculture Movements - IFOAM EU Group
- www.ifoam.org: International Federation of Organic Agriculture Movements (IFOAM)
- europa.eu.int/comm/agriculture/qual/organic/index_en.htm: The European Commission's organic farming website
- ec.europa.eu/Eurostat: Eurostat: Organic farming data: ec.europa.eu/eurostat > Statistics > Statistics A-Z > Agriculture > Data > Main tables > Organic Farming
- www.fibl.org: FiBL – Research Institute of Organic Agriculture
- www.organic-congress-ifoameu.org: Website of the organic congresses of the IFOAM EU Group
- www.organic-europe.net: Organic Europe, maintained by FiBL: Country reports, address database, statistics
- www.organic-market.info: Organic Market Info: Market News and updates: www.organic-market.info
- www.organic-world.net: Organic World (maintained by FiBL): Statistics, country information, news
- www.tporganics.eu: Technology Platform TP Organics