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THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2025

OCEANIA 53.2 MILLION HA

EUROPE 19.5 MILLION HA

LATIN AMERICA AND CARIBBEAN 10.3 MILLION HA

ASIA 9.1 MILLION HA

AFRICA 3.4 MILLION HA

NORTH AMERICA 3.3 MILLION HA

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Edited by

Helga Willer, Jan Trávníček and Bernhard Schlatter

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Achieving the EU Farm-to-Fork 25% Organic Target: How Can Policy Support This Goal?

NICOLAS LAMPKIN¹, INGRID JAHRL² AND SABINE REINECKE³

Introduction

With its Farm-to-Fork (F2F) and Biodiversity strategies, the European Union (EU) has set a very ambitious target of having at least 25 percent of the EU's agricultural land under organic production by 2030. Between 1985 and 2022, the EU's organic land and producers experienced a steady growth, doubling every decade to reach around 17 million hectares (10.54 percent) (Figure 99). The COVID-19 pandemic and the consequences of Russia's invasion of Ukraine for energy, fertiliser and food prices have impacted conversion confidence in several countries, including Germany, France and Austria. However, overall growth rates at the European level have remained consistent. Based on past growth trends, it is likely that 15 to 18 percent of the EU's utilised agricultural area (UAA), equivalent to 24 to 30 million hectares, could be managed organically by 2030 (see Figure 99). Reaching the 25 percent target (40 million hectares), however, represents a greater challenge, requiring at least a 50 percent increase in current growth rates. Without such growth, the 25 percent target might be reached between 2035 (exponential growth projection) and 2050 (linear growth projection).

While the organic land area has doubled, the market has grown nearly threefold each decade since 2000 (Figure 100). Continued exponential growth of this magnitude could result in a retail sales value of 80 billion euros by 2030. The market growth has, however, been impacted recently both by the pandemic (generating faster growth) and the effects of the war in Ukraine (slowing growth). Although some countries have continued to experience market growth, it remains to be seen when growth at EU level will restart. Market development is uneven across the EU, with some countries having well-established domestic markets, others relying heavily on exports and some still in the early stages of developing domestic or export markets. Continued market growth is important for producer confidence to convert their farms. The recent decline in market growth has led to a slow down or even negative conversion rates in some countries, but, as discussed above, this has been compensated by growth elsewhere.

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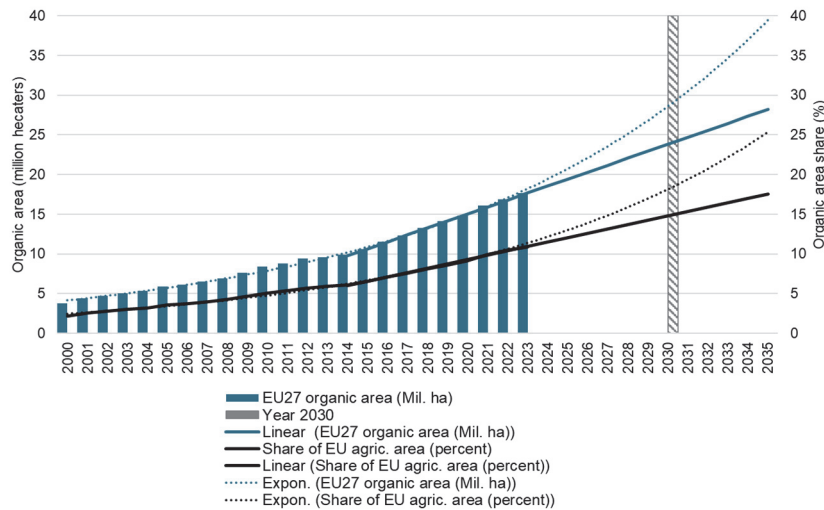


Figure 99: Growth of organic farmland in the EU from 2000 to 2023, and alternative exponential and linear projections to 2035

Source: FiBL statistics with projections added. Note: This chart uses linear and exponential (expon.) trendlines to show forecasts based on past data. A linear trendline represents a straight-line prediction, assuming the trend continues at a constant rate. An exponential trendline shows values that increase at an accelerating rate. Please note that these trendlines are only estimates, and actual results may vary.

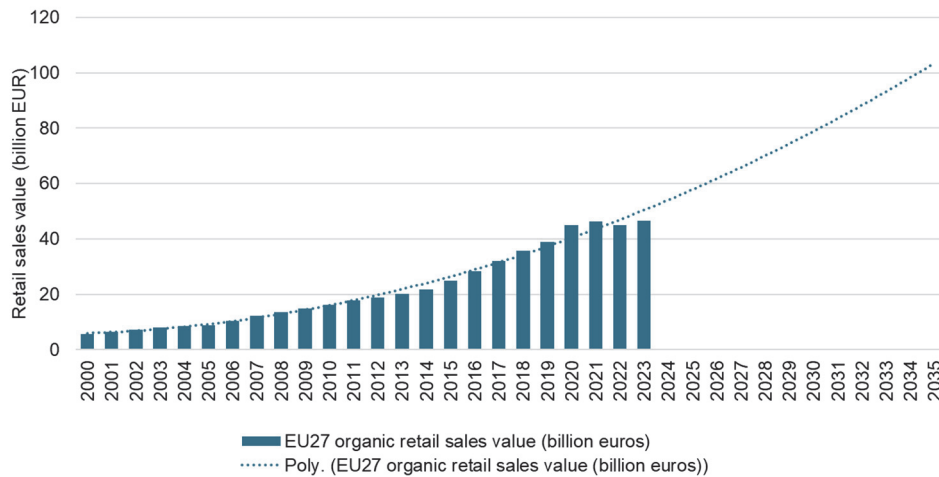


Figure 100: Growth of EU organic market from 2000 to 2023, with continued exponential growth projection to 2035

Source: own calculations based on FiBL Statistics. Note: In this chart, a polynomial (poly.) trendline has been used to forecast future values based on past data. However, please note that this trendline is only an estimate and actual results may vary.

Getting to more than 10 percent of EU agriculture organic is already a significant achievement. This was made possible by the introduction of a legal definition of organic farming in 1992, which provided a secure basis for the development of the organic market, and by the introduction of policy support for conversion to and maintenance of organic farming from 1994. Other forms of support, including market investment aids, public procurement, consumer promotion, advice, training, research and innovation have also played a role.

To bridge the gap between current growth trends and the ambitious 2030 objective, the EU is relying on supportive policy frameworks and targeted measures defined in current Common Agricultural Policy (CAP) Strategic Plans and national Organic Action Plans.

CAP Strategic Plans

In earlier CAP periods, the European Commission (EC) set the overall support framework for organic farming, within which Member States (MS) were obliged or encouraged to implement relevant measures. In the current CAP programming period (2023-2027), Member States are given more responsibility for defining specific measures to achieve the overall CAP objectives. Member States were required to produce national CAP Strategic Plans to specify how their national needs and priorities are aligned with the overall CAP environmental, economic and social objectives. These plans were agreed with the European Commission in late 2022.

Support for organic farming conversion and maintenance is included in all CAP Strategic Plans, with details of planned payment rates, eligibility conditions, estimated uptake and expenditure. This includes the Netherlands, which had not provided support in the previous two CAP programming periods, and France, which halted maintenance payments in 2018. For countries such as Spain, Italy, Germany and France, which previously had regional rural development plans, details on regional variations in payment rates and expenditures were also included. The support employs a mix of Pillar 1 (direct payments to stabilise farm incomes and support market measures) and Pillar 2 (rural development funds aimed at promoting environmental sustainability, competitiveness, and innovation) approaches. Similar support policies have been implemented in neighbouring countries, including Switzerland, Norway and the UK.

All EU Member States have set targets for organic land area to be achieved by 2027 or 2030 (Figure 1013), in either their CAP Strategic Plans or national organic action plans, or in a few cases separately. The national targets combined represent almost 19 percent of EU agricultural area, short of the EU target but consistent with continued exponential growth of the organic sector. As Figure 101 indicates, not all organic land received support payments in 2018 and this is likely to continue in the next period. In some countries (Austria, Italy and Sweden), the planned supported area for 2027 remains at or below the 2018 certified area. In addition, some of the national targets set for 2030 are significantly above the financial support provisions made for 2027. Germany in particular has a large divergence between the 30 percent organic target at federal level, and the 12 to 14 percent targets detailed in its CAP Strategic Plan, reflecting in part the

lower willingness of the Federal States (Bundesländer) to make financial commitments to reach the federal target.

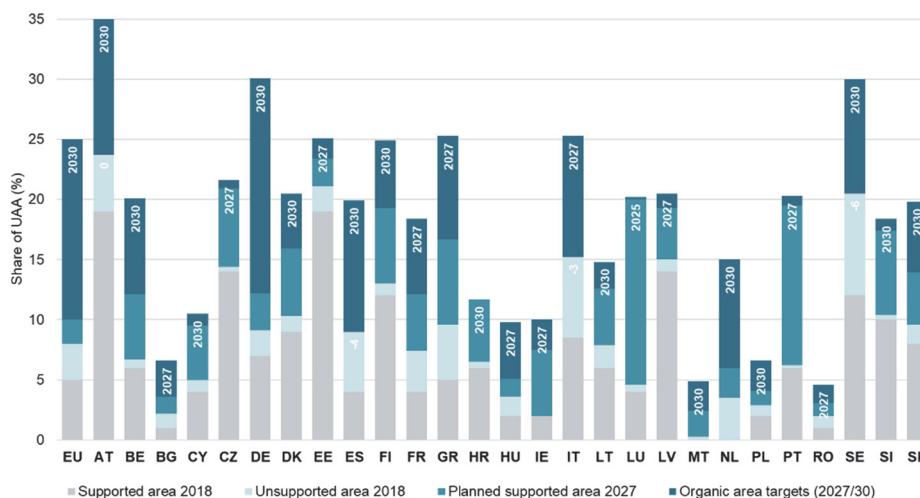


Figure 101: Organic farming shares of EU and Member State agricultural land area, including policy-supported and certified land in 2018 (actuals), land planned to be supported by 2027 and targeted to be certified organic by 2027 or 2030

Source: Lampkin et al. (2024) Deliverable 1.2 of the OrganicTargets4EU project

Values at top of light blue sections (Planned supported area 2027) for Austria (AT), Spain (ES), Italy (IT) and Sweden (SE) indicate that the planned supported area in 2027 is less than the certified area in 2018 by the % UAA amount shown. Acronyms of EU member states: AT = Austria, BE = Belgium, BG = Bulgaria, CY = Cyprus, CZ = Czechia, DE = Germany, DK = Denmark, EE = Estonia, EL = Greece, ES = Spain, FI = Finland, FR = France, HR = Croatia, HU = Hungary, IE = Ireland, IT = Italy, LT = Lithuania, LU = Luxembourg, LV = Latvia, MT = Malta, NL = Netherlands, PL = Poland, PT = Portugal, RO = Romania, SE = Sweden, SI = Slovenia, SK = Slovakia.

Overall, EU Member States have planned to double the land area supported from 5 percent of EU UAA in 2018 to 10% in 2027 (equivalent to 15 percent of UAA certified area if one third of the organic land remains unsupported as in 2018). On average, Member States also plan to double the expenditure on organic area support to more than 3.7 billion euros in 2027/8 compared with 1.8 billion euros in 2018. Average expenditure per hectare will increase by 5 percent. In total, more than 16 billion euros have been budgeted for organic farming area support in the five-year period 2023-2027, equivalent to 5 percent of total CAP expenditure and 20 percent of expenditure on environmental (Pillar 1 eco-schemes and Pillar 2 agri-environment) measures. These figures hide a wide degree of variation among Member States.

Organic Action Plans

In addition to the inclusion of organic support and targets in the CAP Strategic Plans, Member States have responded to the 2021 EU Organic Action Plan’s call for more national organic action plans (Figure 4). By 2024, all except three Member States (Greece, Spain and Lithuania) had national or regional organic action plans in place. Some countries like Denmark and Sweden have had multiple action plans since the 1980s, which have become progressively more focused on specific themes like public procurement. Others like Malta, Cyprus, Portugal and Romania have introduced action plans for the first time, in some cases encouraged by the European Commission during the CAP Strategic Plan negotiations.

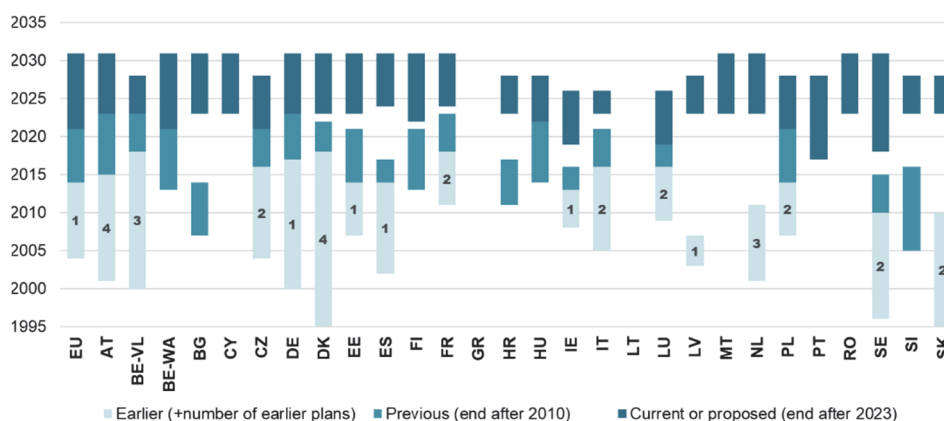


Figure 102: Periods (years) covered by current/planned (ending after 2023), previous (ending after 2010) and earlier organic action plans in EU Member States¹

Source: Lampkin et al. (2024) Deliverable 1.2 of the OrganicTargets4EU project. Note: Acronyms of EU member states: AT = Austria, BE-VL = Flanders, the northern region of Belgium, BE-WA = Wallonia, the southern region of Belgium. BG = Bulgaria, CY = Cyprus, CZ = Czechia, DE = Germany, DK = Denmark, EE = Estonia, EL = Greece, ES = Spain, FI = Finland, FR = France, HR = Croatia, HU = Hungary, IE = Ireland, IT = Italy, LT = Lithuania, LU = Luxembourg, LV = Latvia, MT = Malta, NL = Netherlands, PL = Poland, PT = Portugal, RO = Romania, SE = Sweden, SI = Slovenia, SK = Slovakia.

Organic action plans permit the integration of supply-push policies such as the area support payments with more demand-pull market- and information-focused policies. They can also support a balance between public good environmental and private sector economic outcomes. Many of the actions in the organic action plans are funded as sector or rural development measures, but without ring-fenced funding for organic support or statistical data to quantify outputs. This includes investment aids for production and processing, producer organisations, advice, training or EIP-AGRI² Operational

¹ For explanation of acronyms, see footnote for previous figure.

² EIP-AGRI is the European Union’s agricultural European Innovation Partnership. It works to foster competitive and sustainable farming and forestry. It contributes to ensuring a steady supply of food, feed

Groups¹. Others including public procurement, promotion and research are funded from other EU or national programmes.

Conclusions

The current national CAP strategic and organic action plans show a clear improvement in ambition compared to the previous supporting period in terms of land area supported, payment rates, or scope and number of action plans. However, they still fall short of what is needed to achieve the Farm-to-Fork Strategy targets. Reaching the 25 percent organic farmland goal by 2030 will require much more targeted action, including stronger policy support, robust market development and enhanced collaboration across sectors involved in organic farming. A system-wide approach is crucial, integrating policies that stimulate both supply and demand, supported by strong institutions, effective collaboration within the farming community, and secure market access. Reforms in agricultural knowledge and innovation systems (AKIS), alongside participatory research and innovative marketing strategies, are critical to mitigating risks for farmers and making organic farming more viable. Expanding cooperation with non-agricultural stakeholders, such as those in public health and civil society, can further reinforce public support and legitimacy for organic farming, embedding it as a central component of sustainable food systems.

These developments highlight the need for significant reforms and innovations to accelerate progress towards the Farm-to-Fork targets. The Horizon Europe project OrganicTargets4EU² is focused on determining the key areas and strategies required to implement these reforms effectively. The project explores different scenarios and facilitates a multi-stakeholder policy dialogue to help achieve the goal of 25 percent organically farmed land in the EU, with final results expected by 2026.

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and biomaterials, developing its work in harmony with the essential natural resources on which farming depends. More information is available at <https://ec.europa.eu/eip/agriculture/en/about.html>

¹ An EIP-AGRI Operational Group is a group of people with complementary knowledge (e.g. practical, scientific, technical, organisational expertise, etc.) who co-create practical solutions for agriculture, forestry and rural communities in an innovation project. For more information, see website of the EU CAP network at https://eu-cap-network.ec.europa.eu/operational-groups_en

² The project "OrganicTargets4EU - Transformation scenarios for boosting organic farming and organic aquaculture towards the Farm-to-Fork targets" runs from 2022 to 2026. More information is available at <https://cordis.europa.eu/project/id/101060368> and at <https://organictargets.eu>

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