



**Transformation scenarios for boosting organic farming
and organic aquaculture towards the Farm-to-Fork targets**

Report | Public

Deliverable 1.2

Assessment of agricultural and aquaculture policy responses to the organic F2F targets

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List of Abbreviations

AND	Andalucia	FTE	Full-time Equivalent
AT	Austria	G	Giga (billion, thousand million)
BE	Belgium	GR	Greece
BG	Bulgaria	HR	Croatia
CAP	Common Agricultural Policy	HU	Hungary
CFP	Common Fisheries Policy	HX	Hexadome = FR mainland
CH	Switzerland	IE	Ireland
CHF	Swiss Francs	IT	Italy
CLLD	Community-led Local Development	LT	Lithuania
CSP	CAP Strategic Plan	LU	Livestock unit
CY	Cyprus	LU	Luxembourg
CZ	Czechia	LV	Latvia
DE	Germany	M	Mega (million)
DG	Directorate General	MFSD	Marine Strategy Framework Directive
DK	Denmark	MT	Malta
DKK	Danish Krone	MS	Member State (EU)
EAGF	European Agricultural Guarantee Fund	NGO	Non-governmental Organisation
EAFRD	European Agricultural Fund for Rural Development	NL	Netherlands
EC	European Commission	OAP	Organic Action Plan
ECU	European Currency Unit	PL	Poland
EE	Estonia	PT	Portugal
EMFAF	European Maritime, Fisheries and Aquaculture Fund	RDP	Rural Development Programme
EMFF	European Maritime and Fisheries Fund	RO	Romania
ES	Spain	SE	Sweden
EU	European Union (28 incl. UK, 27 excl. UK)	SI	Slovenia
EUMOFA	EU Market Observatory for Fisheries and Aquaculture	SK	Slovakia
EUR	Euros	SP	Strategic Plan
FI	Finland	SWOT	Strengths, Weaknesses, Opportunities, Threats
FR	France	UAA	Utilisable Agricultural Area
		UK	United Kingdom
		VAT	Value Added Tax
		VLA	Vlaanderen
		WAL	Wallonie
		WFD	Water Framework Directive



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Executive Summary

This report provides a comparison of organic farming and aquaculture support policies in the periods 2021-2027 and 2014-2020, to see how the policies have developed in the context of the EU's Farm to Fork and Biodiversity Strategy targets to reach 25% of agricultural land managed organically, and a significant increase in aquaculture, by 2030.

Organic farming has been supported as a policy measure in individual countries since the 1980s and on an EU-wide basis since the early 1990s. The first regulation defining organic farming (Reg. 2092/91) came into effect in 1992, and provided a legal basis for market development and the inclusion of organic farming as an agri-environmental policy measure from 1994 (Reg. 2078/92), accompanying the main Common Agricultural Policy (CAP). These two regulations provided the foundation for a consistent growth in the organic sector over the last 30 years. Over time, additional rural development, public procurement, promotion, research, CAP Pillar 1 measures, and organic action plans at regional, national and European levels, have been added to the policy mix. There has also been a corresponding development of policy support for organic aquaculture as part of the Common Fisheries Policy (CFP) in the 2014-2020 and 2021-2027 periods. However, despite the significant policy support, there still seems to be a need for institutional change and capacity building. It is questionable whether enough is being done to meet the EU's strategic targets and considering the environmental benefits that the achievement of the 25% organic share of land area and the increase in aquaculture target could deliver.

The combination of policy support and the market for organic products has enabled organic production in the EU to increase from just over 100,000 ha in 1987 to 13.7 million ha, or 7.6% of EU agricultural area (UAA), in 2018, and nearly 10% of UAA by 2021. The CAP from 2014-2020 saw organic farming given separate status in the Rural Development Programming framework, and its environmental credentials recognised by de facto qualification for Greening under the CAP Pillar 1 direct payments scheme. At the same time, organic aquaculture was included in the CFP through the European Maritime and Fisheries Fund and the Multi-annual National Strategic Plans for Aquaculture.

In 2019, the EU's Green Deal policy framework for climate change was published, leading to the Farm to Fork and Biodiversity Strategies which set the ambitious targets for reaching 25% of EU agricultural land managed organically and a significant increase in organic aquaculture by 2030. In 2021, the EU's organic action plan encouraged Member States (MS) to develop national strategies for organic farming in the context of the next phase of CAP Reform, and the Strategic Guidelines for Aquaculture did the same for organic aquaculture. As a result, the policy framework for supporting organic production in the EU has been strengthened in both the CAP from 2023-2027 and the CFP from 2021-2027. Further details are provided in the report.





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Building on previous work covering the 2014-2020 period, this report analyses what has been delivered in terms of organic farming support in the national CAP Strategic Plans (CSPs) for 2023-2027, agreed between the European Commission and MS in 2022, with the Commission pushing for substantive commitments to organic farming support. Planned expenditure, land area targets and payment rates are compared with values for 2018/19. Key findings are that:

- All Member States (MS) have implemented policies to support conversion to and maintenance of organic farming, including the Netherlands, which had not provided support in the previous two CAP programming periods, and France, which halted maintenance payments in 2018. Similar support policies have been implemented in neighbouring countries, including Switzerland, Norway and UK.
- All MS included detailed sections on organic farming in their CSPs, with details of planned payment rates, eligibility conditions, estimated uptake and expenditure. For countries such as Spain, Italy, Germany and France, which previously had regional rural development plans, substantial detail on regional variations in payment rates and expenditures were also included.
- All Member States have set targets for organic land area to be achieved by 2027 or 2030, in either their CAP Strategic Plans (CSPs) or national organic action plans (OAPs), or in a few cases separately. The neighbouring countries (CH, NO and UK) do not have similar targets.
- MS have planned to double the land area supported from 5% to 10% of EU UAA, and to nearly double the expenditure on organic area support by 2027/8 compared with 2018. They have budgeted for more than €3.4 billion in annual support payments for organic farming by 2027/8, which compares with €1.8 billion in 2018, an increase of 89%. In total, more than €15 billion have been budgeted for organic farming area support in the five-year period 2023-2027, equivalent to 5% of total CAP expenditure, and 20% of expenditure on environmental (Pillar 1 eco-schemes and Pillar 2 agri-environment) measures. These figures hide a wide degree of variation among MS.

In addition to the inclusion of organic support and targets in the CSPs, MS have also responded to the 2021 EU organic action plan's emphasis on MS developing national organic action plans. By 2023, almost all MS have national or regional organic action plans (OAPs) in place, which permit the integration of supply-push policies such as the area support payments with more demand-pull market- and information-focused policies, and can help to get a balance between public good environmental and private sector economic outcomes. Many of the policies, including investment aids for production and processing, producer organisations, advice, training and EIP operational groups, are funded as sector or rural development measures, but without ring-fenced funding for organic support or statistical data to quantify outputs. Others including public procurement, promotion and research are funded from other EU or national programmes. The report compares the scope of current and previous plans, providing a summary of key actions in thirteen different policy areas relating to production, markets and



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information, and finds that most MS have made some incremental improvements in scope, but that the transformational policies needed to deliver the EU's 25% target, including institutional change and capacity building, are still lacking.

Based on EU and national sources, the total organic aquaculture production in the EU27 is estimated by EUMOFA at 73,570 tonnes in 2020 accounting for 6.7% of the total EU aquaculture production, 60% more than in 2015, with Ireland the main producing country. Further details of national production for individual species are contained in the report.

Enhanced policy support for organic aquaculture has also been identified:

- Organic aquaculture policy is supported at European level by the 2021-2030 Strategic Guidelines for the sustainable development of EU aquaculture. These recommendations include i) the promotion of organic aquaculture and other aquaculture systems with lower environmental impact; ii) the promotion of organic aquaculture certification and labelling; iii) the promotion of organic production standards, and iv) the implementation of spatial planning measures that ensure specific areas for organic aquaculture.
- At national level, the organic aquaculture policies are included in the "Multi-annual Strategic Plans for Aquaculture". In general, the analysis of the state of organic aquaculture is poorly developed in these plans, at least in comparison with 'sustainable' conventional aquaculture. Actions for organic aquaculture, including research, were also identified in the national OAPs, even though they are mainly focused on land-based production.
- The identification of objectives and activities aimed at promoting the development of organic aquaculture in the national programmes of the European Maritime and Fisheries Fund (EMFF) 2014-2020 and the European Maritime, Fisheries and Aquaculture Fund (EMFAF) 2021-2027 is also not very detailed.
- It is not possible to make a full assessment regarding the actual use of funds for organic aquaculture due to the lack of relevant indicators and statistical data. The increase in total EMFAF funding in the current period (2021-2027) compared with the previous period (2014-2020) provides scope for increased support for organic aquaculture, but no ring-fenced funding was identified, and the uptake of funding will depend on project submissions by organic companies.

Despite the progress that is evident in policy terms, it is questionable whether enough is being done to meet the challenge of reaching the EU's ambitious strategic targets, or those of some MS. A business as usual, linear trend projection based on the five years growth from 2016 to 2020, suggests that 15% of EU UAA might be achievable by 2030, while 18% would be consistent with the doubling of organic land area and trebling of organic market value every 10 years seen over the last 20 years. Taking all the MS national targets for organic farming into account, 20% of EU UAA may be reachable.



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For aquaculture, the combination of uncertainty with respect to policy commitments, financial and market challenges and input availability constraints are currently hampering its growth. Reaching 25% of UAA or significant growth in aquaculture will require additional effort and fresh perspectives on policy measures for the next phase of CAP and CFP reform from 2028. These perspectives will be addressed in more detail in later stages of this project, with some initial considerations being included in this report.



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Introduction

In recognition of its environmental and economic potential, organic farming in the EU has been the subject of increasing policy support for more than 30 years. A few countries already introduced support for conversion to and continuation with (maintenance of) organic farming in the late 1980s, in part as a response to the challenges then with food surpluses. With the advent of a regulation defining organic farming (CoE, 1991) and the agri-environmental accompanying measures (CoE, 1992), conversion to and maintenance of organic farming were established as policy measures under Pillar 2 of the EU Common Agricultural Policy (CAP). This support was later extended to cover prioritisation for other rural development programme (RDP) interventions including capital investment and processing and marketing grants, training and advice and, separately from Pillar 2, consumer promotion, public procurement and research (Lampkin & Sanders, 2022).

In the last ten years, there has also been a corresponding development of policy support for organic aquaculture as part of the Common Fisheries Policy, especially in the 2014-2020 and 2021-2027 programming periods. The interest in organic aquaculture is reflected in the Strategic Guidelines for the sustainable development of EU aquaculture, adopted by the EU 2021 (EC, 2021b), and the guidance on the use of funding from the European Maritime and Fisheries Fund (EMFF), now renamed the European Maritime, Fisheries and Aquaculture Fund (EMFAF). Member States have been encouraged, also in the context of the EU Organic Action Plan 2021-2030, to include the increase of organic aquaculture among the objectives of their revised Multi-annual National Strategic Plans for Aquaculture.

The aim in Part A of this report is to analyse the changes in organic farming support policies resulting from the new CAP for 2023-2027¹, the Green Deal (EC, 2019)², the Farm to Fork (EC, 2020b)³ and Biodiversity (EC, 2020a)⁴ Strategies and the EU 2021 Organic Action Plan (OAP)⁵ (EC, 2021a). This involves an analysis of the CAP Strategic Plans for all EU Member States (MS), as well as current and previous national or regional OAPs. Results are compared with the situation in the 2014-2020 period based on previously conducted research (Lampkin & Sanders, 2022).

The documentation of the CAP Strategic Plans, including detailed specifications of organic support policies from 2023-2027, and the national organic plans, were readily available online, with extracts translated using DeepL, thus avoiding the need to send questionnaires to national Ministry and NGO contacts. In a few cases, clarifications were

¹ https://agriculture.ec.europa.eu/common-agricultural-policy/cap-overview/cap-2023-27_en, accessed 20.09.23

² https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en, accessed 20.09.23

³ https://food.ec.europa.eu/horizontal-topics/farm-fork-strategy_en, accessed 20.09.23

⁴ https://environment.ec.europa.eu/strategy/biodiversity-strategy-2030_en, accessed 20.09.23

⁵ https://agriculture.ec.europa.eu/farming/organic-farming/organic-action-plan_en, accessed 20.09.23



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sought, and access given to unpublished near final drafts of national organic action plans. This analysis has covered all EU Member States, as well as on a more limited basis for Switzerland and Norway.

The Chapters in Part A cover: 1. The historical development of organic farming policies; 2. The inclusion of organic farming support in the national CAP Strategic Plans for the 2023-2027 period compared with the previous 2014-2020 (extended to 2022) programming period; and 3. A review of the extent and scope of current national organic action plans compared with previous versions.

A similar approach has been taken in Part B of the report for organic aquaculture support policies provided under the European Common Fisheries Policy (CFP), but with the review of implementation restricted to nine countries (Austria, Croatia, Denmark, France, Germany, Greece, Ireland, Italy, Spain). The Chapters in Part B cover: 4. A review of the current extent of organic aquaculture; 5. An outline of the Common Fisheries Policy, the Strategic Guidelines and the financial support through EMFF in 2014-2020 and EMFAF in 2021-2027; and 6. A review of the Multi-annual National Strategic Plans implemented by MS in the context of the CFP and the Strategic Guidelines.

The results provide an inventory of current policies for organic sector development compared with 2014-2020 and an assessment of how MS have responded to the EU Commission's organic targets in the Farm to Fork and Biodiversity Strategies, with the results feeding into WP1.5 and subsequent parts of the Organic Targets for EU project. Although different agricultural policy frameworks apply in Switzerland and Norway, and more recently the UK, we have included references to these countries occasionally for historical or comparative context.



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Part A: Organic farming and agricultural policy

NICOLAS LAMPKIN AND PIA REHBURG



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1. Policy development for organic farming

Policy support schemes specifically targeted at organic farming have existed in individual European countries since the late 1980s and on an EU-wide basis since 1994. The first scheme was introduced in Denmark in 1987, shortly followed by Austria and Sweden using national support measures. Germany introduced conversion aid under the EU extensification programme (CoE, 1985) in 1989. As part of the McSharry reform of the Common Agricultural Policy (CAP) implemented in 1994, the introduction of the agri-environment programme in 1994 (CoE, 1992) provided a unified framework for supporting conversion to and maintenance of organic farming across the EU. This was made possible by the prior introduction of an EU Regulation defining organic farming (CoE, 1991). Since then (mainly area-based) conversion and maintenance support payments for organic production have become a key measure under the agri-environmental and rural development programmes (RDP) of the CAP 2nd Pillar.

The history of policy support for organic farming in Europe has been documented in a series of reports which have monitored and evaluated European organic farming policies since the 1990s, covering the following 7-year CAP programming periods:

- 1994-1999 (Lampkin *et al.*, 1999b, 1999a);
- 2000-2006 (Håring *et al.*, 2004; Hrabalova *et al.*, 2005; Tuson & Lampkin, 2007; Stolze & Lampkin, 2009);
- 2007-2013 (Schwarz *et al.*, 2010; Sanders *et al.*, 2011);
- 2014-2022 (Lampkin & Sanders, 2022).

As the land area under organic management in the European Union has grown, from a little over 100 thousand hectares (kha) in 1987 to 13.8 million hectares (Mha) in 2018, or 7.5% of the then EU28 agricultural area, so too has the expenditure on policy support. By 1997, almost 2.5 Mha were certified, and 260 million European Currency Units (ECU) spent annually on support (Lampkin *et al.*, 1999b). In 2007, nearly 7.5 Mha were certified, and expenditure increased to more than 800 million Euros (M€).

CAP 2014-2022

In the last CAP programming period (2014-2020, extended to 2022), organic farming was allocated its own Article in the Rural Development Regulation (EU, 2013). By 2018, almost 8.8 Mha organic land were supported at an annual cost of nearly 1.8 billion € (Table 1.1). All MS except the Netherlands provided conversion and/or maintenance support of this type, albeit with some more intermittent engagement in some countries where resources were limiting. Payment rates per hectare varied widely within and between Member States, reflecting regional conditions, political priorities and differentiation by crop or livestock species (Lampkin & Sanders, 2022). In Switzerland, although payments for organic arable land are higher than in the EU (Table 9.1d), grassland payments are much lower and with grassland dominating, the average payment is more similar to the EU, though still somewhat higher.



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Table 1.1: Uptake of and expenditure on organic farming support in EU Member States and CH, 2018

Country	Total support payments (M€)	Total land area supported (kha)	% of 2018 national UAA supported	Average support (€/ha)	Total land area certified (kha)	% certified area supported	% of national UAA certified
AT	121	515	19.4%	234	639	81%	24.1%
BE	19	80	5.9%	243	89	89%	6.6%
BG	24	68	1.4%	354	129	53%	2.6%
CY	4	5	3.5%	805	6	76%	4.5%
CZ	53	506	14.4%	105	520	97%	14.8%
DE	300	1,150	6.9%	261	1,498	77%	9.0%
DK	41	223	8.5%	184	257	87%	9.8%
EE	18	186	18.9%	99	207	90%	21.0%
ES	159	1,045	4.3%	152	2,246	47%	9.3%
FI	56	274	12.1%	205	297	92%	13.1%
FR	180	1,040	3.6%	173	2,035	51%	7.0%
GR	97	248	4.7%	390	493	50%	9.3%
HR	33	94	6.4%	350	103	91%	6.9%
HU	21	115	2.2%	186	209	55%	3.9%
IE	8	72	1.6%	111	74	97%	1.6%
IT	386	1,098	8.5%	352	1,958	56%	15.2%
LT	36	184	6.2%	197	240	77%	8.1%
LU	1	5	3.8%	258	6	85%	4.4%
LV	28	261	13.5%	107	280	93%	14.5%
MT	0.002	0.01	0.1%	374	0.05	13%	0.4%
NL	0	0	0.0%	0	64	0%	3.5%
PL	47	342	2.4%	138	485	71%	3.3%
PT	25	206	5.7%	124	213	96%	5.9%
RO	42	183	1.4%	232	326	56%	2.4%
SE	75	355	11.8%	211	609	58%	20.3%
SI	10	46	9.6%	210	48	96%	10.0%
SK	17	158	8.2%	108	189	84%	9.8%
UK	18	338	1.9%	53	457	74%	2.6%
EU28	1,821	8,798	4.9%	207	13,677	64%	7.6%
CH	50	156	14.9%	308	161	97%	15.4%

n/a: not available; 2019 average EUR exchange rates used for conversions

Sources: Lampkin and Sanders (2022), FIBL Statistics and CH-Federal Statistical Office

Green Deal, Farm to Fork and Biodiversity Strategies

As part of the EU's Green Deal addressing climate change and environmental-related challenges (EC, 2019), the European Commission published two key strategies in 2020 designed to contribute to its delivery. The Farm to Fork Strategy (EC, 2020b) set out a series of targets to enhance the sustainability of food production in the EU, including a 50% reduction in pesticide use, a 20% reduction in fertiliser use, and the 25% target for share of agricultural land to be managed organically. The organic target was also included in the Biodiversity Strategy (EC, 2020a) as was a target of 10% of farmland to be managed primarily for nature rather than food production.



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The setting of the 25% target for organic farming represented a major shift in the policy priority allocated to organic farming and was reinforced by the expectation in the most recent EU Organic Farming Action Plan (EC, 2021a) that all MS would include strategic initiatives for organic farming in their CAP Strategic Plans covering the period 2023-2027.

Most recent CAP Reform (2023-2027) and national Strategic plans

For the CAP 2023-2027 programming period, Member States (MS) were required to produce national CAP Strategic Plans and agree them with the EU Commission (EU, 2021). This was intended to be part of a process of simplifying the CAP, in part by reducing the number of regional rural development plans submitted. It was also intended to pass to MS the responsibility for defining measures to achieve specific objectives (Figure 1.1), with the EU Commission role to ensure specific policy objectives were being delivered, and that the measures implemented were appropriate to meet these in the context of defined national needs and priorities.



Figure 1.1: Overview of 10 key objectives for the CAP 2023-2027

Source: European Commission, Brussels

The initial CAP Strategic Plans were submitted in late 2021 or early 2022, with negotiations taking place during 2022 and all 28 CAP Strategic Plans (2 for Belgium) being finalised and agreed by the end of 2022⁶. A summary overview of the 28 approved CSPs has been produced by the EU Commission (DG Agri, 2023a)⁷, with a breakdown of activity levels, result indicators and expenditure for most measures (Table 1.2).

⁶ https://agriculture.ec.europa.eu/cap-my-country/cap-strategic-plans_en, accessed 20.9.23
⁷ <https://agriculture.ec.europa.eu/system/files/2023-06/approved-28-cap-strategic-plans-2023-27.pdf>, accessed 20.9.23



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Table 1.2: Distribution of the total public planned expenditure for EAGF (CAP Pillar 1) and EAFRD (CAP Pillar 2), underpinning the implementation of all 28 CSPs, according to instruments specified in the CSP Regulation (2023-2027)

Type of Intervention (Articles)	EU Contribution (€)	National co-funding	Total public expenditure (EU+national)	Share of total CAP exp. (%)
Support through the European Agricultural Guarantee Fund (EAGF)				
Basic income support (21-28)	96,697,483,142	Not applicable	96,697,483,142	31%
Coupled income support (32-35)	23,030,903,969		23,030,903,969	7%
Young farmers (30)	3,407,403,394		3,407,403,394	1%
Redistrib. Support (29)	20,094,247,101		20,094,247,101	7%
Eco-schemes (31)	44,712,639,715		44,712,639,715	15%
Cotton (36-41)	1,232,110,245		1,232,110,245	0.4%
Total EAGF** direct	189,109,706,310			189,109,706,310
Apiculture (54-56)	285,607,172	324,387,287	609,994,458	0.2%
Olives (63-65)	218,729,300	Not applicable	218,729,300	0.07%
Wine (57-60)	4,142,887,347		4,142,887,347	1%
Hops (61-62)	10,940,000		10,940,000	0.004%
Fruit/veg. (49-53)	4,142,887,347		4,142,887,347	1%
Others (66-68)	110,171,983		110,171,983	0.04%
Total EAGF** sectoral	8,915,271,423		324,387,287	9,239,658,760
Support through the European Agricultural Fund for Rural Development (EAFRD)				
Environment/ climate/ animal welfare (70)	20,289,987,423	12,922,384,337	33,212,371,761	11%
Areas with natural constraints (71)	10,598,347,767	8,117,856,724	18,716,204,491	6%
Areas with specific disadvantages (72)	501,286,959	329,170,180	830,457,139	0.3%
Investments (73,74)	18,433,062,578	12,945,827,188	31,378,889,766	10%
Start-ups (75)	3,411,775,402	1,763,146,568	5,174,921,970	2%
Risk management (76)	2,731,774,898	1,859,749,688	4,591,524,586	1%
Co-operation (77)	7,033,768,843	4,125,997,116	11,159,765,960	4%
Knowledge (78)	1,134,104,929	939,153,317	2,073,258,246	0.7%
Tech. assistance***	1,864,585,916	Not applicable	1,864,585,916	0.6%
Total EAFRD support for Rural Development	65,998,694,714	43,003,285,120	109,001,979,834	35%
Total CAP planned expenditure	264,023,672,497	43,327,672,407	307,351,344,904	100%

Source: DG Agri (2023a)

* National contribution or co-financing does not include additional national financing referred to in Article 146 of the CSP Regulation. Payments for support under Regulation (EU) 1308/2013 are not included in the CSPs. Transfers between funds are included.

** Direct payments – Adjusted Annex V of the CSP Regulation (the total includes the estimated product of reduction), where Member States have used that choice, the total includes the estimated amount resulting from the capping of amounts granted to farmers, thus the planned total of all interventions under direct payments is higher than the amount set in Annex V of the CSP Regulation – the difference corresponds to the capping; cotton payments are not planned as an intervention and their allocations are set in Annex VIII of the CSP Regulation.

*** Rural development – technical assistance financed with national funds is not included; early retirement payments which is a measure from 2007-2013 period with maximum payments for 15 years (approximately EUR 5 million in total, including EUR 2 million funded through EAFRD) is not included



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A Catalogue of CAP Interventions⁸ and a Results Indicators Dashboard⁹ have also been published by the Commission, providing an overview of measure implemented and the results achieved on a country-by-country basis.

A further assessment by the Commission of the CAP Strategic Plans was presented to the European Parliament and the Council in late 2023¹⁰ (EC, 2023b), including background research conducted by external organisations. This review highlighted that organic farming was one of the few targets in the Farm to Fork and Biodiversity strategies to be specifically addressed in the CSPs, but it is also true that this is the first time that organic support has been addressed in detail in all CSPs, more so than in previous rural development plans.

⁸https://agridata.ec.europa.eu/extensions/DashboardCapPlan/catalogue_interventions.html, accessed 20.01.24

⁹ https://agridata.ec.europa.eu/extensions/DashboardCapPlan/result_indicators.html, accessed 20.01.24

¹⁰ https://agriculture.ec.europa.eu/system/files/2023-11/com-2023-707-report_en.pdf, accessed 20.01.24



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2. Organic farming support in national CAP Strategic Plans

In this section, we analyse the organic farming content of the national CAP Strategic Plans specifically, including a comparison of support levels with the last CAP programming period. For the comparisons of expenditure, the 2027 supported areas and 2028 expenditure have been compared with 2018 values, and per hectare payment rates for 2023-2027 compared with 2019 values, as these were the most recent values obtained by Lampkin & Sanders (2022).

2.1. Organic land area targets and expenditure

Alongside the EU's 25% share of agricultural land area by 2030 target, all MS have set national targets for share of land area to be managed organically, most reflected in the R29 Result indicator for CAP Performance assessment. The organic areas planned to be supported financially by 2027/8 (2027 areas paid in 2028) are shown in Figure 2.1 (share of UAA from zero to top of blue columns) and Table 2.2. At the EU27 level, this is equivalent to 10% of UAA, almost double the area supported in 2018 (Table 2.1).

Table 2.1: Comparison of EU27 annual organic area support in 2018 (actual) with planned annual support in 2027/8

	2018	2027/8	Change (%)
Supported area (Mha)	8.5	16.6	97
Share of EU UAA (%)	5.1	10.0	96
Expenditure (G€)	1.8	3.4	89
Expenditure (€/ha)	213	205	-4

Source: own estimates derived from CAP strategic plans and Lampkin and Sanders, 2022

In addition, most MS have set higher national targets (grey sections of columns in Figure 2.1) for certified organic and in-conversion land, either in their CSPs, or within national OAPs, some produced after the CSPs had been agreed. The target year date also differs, with many focused on 2030 looking beyond the current CAP period. These national targets are equivalent to almost 20% of EU agricultural land by 2030.

In part, the difference between the higher national targets and the CSP-funded targets can be explained by areas of organic certified land that do not receive direct financial support as such. In 2018, only 64% of EU27 UAA was in receipt of organic farming support. The unsupported areas may be a result of specific land use exclusions, for example landscape elements or permanent grassland (which might qualify for other forms of agri-environmental support), farm size eligibility restrictions, the requirement in some countries, such as Germany, for farms to be fully organic with partly organic farms not eligible, or periods when funding for organic support has not been available. Some countries, for example the Netherlands, provided no support for organic farming in 2018, and France had discontinued maintenance payments at that time.

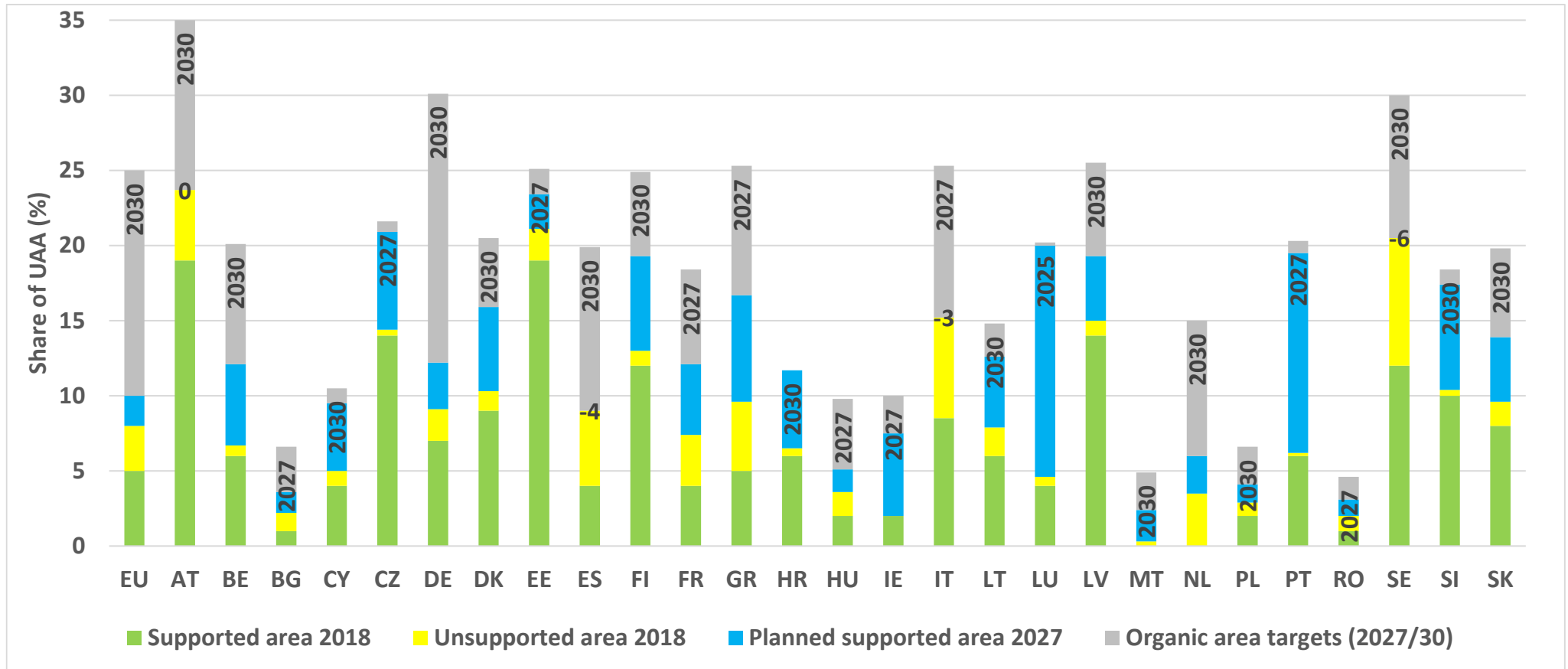


Figure 2.1: Organic farming shares of EU and MS agricultural land area, including policy-supported and certified land in 2018 (actuals), land planned to be supported by 2027 and targeted to be certified organic by 2027 or 2030

Source: Own compilation based on Lampkin and Sanders (2022), national CSPs (including R29 indicators) and national organic action plans (OAP)
Values at top of yellow sections for AT, ES, IT and SE indicate that the planned supported area in 2027 is less than the certified area in 2018 by the % UAA amount shown



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Table 2.2: Comparison of planned 2027/28 supported organic area and expenditure with 2018 actuals

Country	Supported area (kha)			Expenditure (M€)			Expenditure (€/ha)		
	2018	2027/8	Δ (%)	2018	2027/8	Δ (%)	2018	2027/8	Δ (%)
AT	515	610	18	121	154	27	234	252	7
BE	80	163	105	19	46	138	243	281	16
BG	68	202	195	24	118	388	354	585	65
CY	5	11	150	4	5	43	805	459	-43
CZ	506	750	48	53	105	98	105	140	34
DE	1,150	2,384	107	300	553	84	261	232	-11
DK	223	403	81	41	74	81	184	184	0
EE	186	230	24	18	26	41	99	113	14
ES	1,045	1,257	20	159	169	6	152	134	-12
FI	274	580	112	56	90	60	205	155	-24
FR	1,040	3,384	225	180	603 ^a	235	173	178	3
GR	248	846	140	97	259	167	390	306	-22
HR	94	182	93	33	51	56	350	283	-19
HU	115	279	142	21	63	194	186	226	21
IE	72	337	368	8	89	1,016	111	265	139
IT	1,098	1,489	36	386	298 ^b	-23	352	200	-43
LT	184	382	107	36	86	138	197	226	15
LU	5	24	394	1	8	556	258	342	33
LV	261	368	41	28	52 ^c	88	107	142	33
MT	0.01	0.26	4,075	0.002	103	43,539	374	3,913	945
NL	0	109	-	0	22 ^a	-	0	200	-
PL	342	659	93	47	250	430	138	380	175
PT	206	621	202	25	74	192	124	120	-3
RO	183	488	167	42	73	73	232	150	-35
SE	355	437	23	75	73	-3	211	167	-21
SI	46	82	78	10	22	132	210	274	30
SK	158	270	71	17	36	112	108	134	24
EU27	8,460	16,646	97	1,803	3,414	89	213	205	-4

2027 land areas and 2028 expenditures normally used, as payments made in year following.

Figures are for total public expenditure, including national co-financing; Δ = Change

- a. Planned expenditure values for FR and NL eco-schemes have been estimated from per hectare rates and R29 indicators.
- b. For IT, no expenditure data were included in the CSP, so expenditure estimated at 200€/ha.
- c. LV includes the Eco-scheme for agroecological practices on organic farms.

Source: own compilation based on Lampkin and Sanders (2022) and national CSPs

If the same proportion of unsupported land is maintained in 2027/8, then it may be that the projection of 10% of EU UAA to be in receipt of financial support for being organic would be associated with 15% of EU UAA being certified organic, with the 5% UAA difference unsupported.



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The total annual expenditure for the organic area support, including EU funding and national co-financing, is planned also to almost double by 2028, resulting in a small reduction in average expenditure per hectare (Table 2.1). As Table 2.2 indicates, there is however substantial variation in relative values for total expenditure and expenditure per ha between MS. Further aspects of this are analysed in the section on conversion and maintenance payments below.

The increase in planned expenditure means that organic farming is taking an increasing share of CAP expenditures, with total expenditure over the five-year period 2023-2027 (including lagged payments) forecast by us to reach €15.8 billion, or 20% of total Pillar 1 eco-scheme and Pillar 2 agri-environment expenditure, and just over 5% of the total CAP budget (Table 2.3, Table 2.4). Our estimate of total organic expenditure planned is higher than the €14.7 billion value published by the Commission (DG Agri, 2023a). This may be due to the Commission having more accurate financial planning data for NL, FR and IT than is available in the CSPs. We may also have included some schemes, e.g. for organic apiculture, which is sometimes funded as Pillar 1 sectoral scheme, or the LV agroecology eco-scheme for organic farmers that were not included in the Commission estimates. Lastly, some financial planning data for 2029 included in some CSPs may not have been included in the Commission value.

Table 2.3: Comparison of EU27 organic area support planned for 2023-2027 with total eco-scheme and agri-environment expenditure and total CAP expenditure

Expenditure category	Expenditure (G€)	Organic share (%)
Organic land/animals	15.8	100%
Eco-schemes (Art. 31)	44.7	20%
Agri-Environment (Art.70)	33.2	
Total CAP	307.4	5%

Source: own estimates derived from CAP strategic plans and DG Agri, 2023a.

Table 2.4 shows a breakdown of planned total expenditure on organic farming by country for the 2023-2027 CAP and compares the organic expenditure with total expenditure on environmental schemes (Pillar 1 and Pillar 2) and with overall CAP expenditure (excluding Technical assistance). Planned environmental expenditure accounts for nearly 26% of CAP expenditure overall, with values ranging typically from 20-30%, the highest being LU at 36.6% and the lowest MT at 10.9%. Organic farming support accounts for 20.3% of planned environmental expenditure on average, with 17 MS above this value. The highest is GR with 50.4% and the lowest BE-VLA with 5%. HU, IE, NL and RO also have planned organic support at less than 10% of total environmental expenditure. In terms of total CAP expenditure, organic support on average is 5.2%, with the highest share in GR at 11.2, closely followed by LV at 10.3%, and the lowest shares in BE-VLA at 1%, with MT and NL only a little higher.



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Table 2.4: Total CAP budgets by country and selected categories for the 2023-2027 programming period, with total planned expenditure on organic farming support and organic share of total Pillar 1 & 2 environmental expenditure, and total organic and environmental as share of total CAP expenditure.

Country	Basic & coupled income	Eco-schemes	Total Pillar 1	Env, Clim, Welfare	Total Pillar 2	Total CAP	Total Organic	Org/ Env	Org/ CAP	Env/ CAP
AT	2,478	500	3,484	2,362	5,166	8,650	753 ^e	26.3%	8.7%	33.1%
BE-VLA	648	261	1,383	134	593	1,975	20	5.0%	1.0%	20.0%
BE-WAL	685	345	1,329	234	527	1,856	140	24.1%	7.5%	31.2%
BG	2,607	1,027	4,276	774	3,450	7,726	407	22.6%	5.3%	23.3%
CY	176	45	255	55	196	450	22	21.9%	4.9%	22.2%
CZ	1,893	1,235	4,215	1,478	3,741	7,955	452	16.7%	5.7%	34.1%
DE	13,947	4,935	22,505	5,083	11,664	34,169	2,374	23.7%	6.9%	29.3%
DK	3,299	819	4,153	152	695	4,848	254	26.2%	5.2%	20.0%
EE	658	279	1,009	151	605	1,614	120	27.9%	7.4%	26.6%
ES	15,692	5,553	25,808	1,837	8,161	33,969	819	11.1%	2.4%	21.8%
FI	1,987	430	2,637	1,762	4,020	6,657	385	17.6%	5.8%	32.9%
FR	21,659	8,558	35,590	2,718	14,152	49,742	2,725 ^{a,d}	24.2%	5.5%	22.7%
GR	5,501	2,175	8,922	777	4,371	13,293	1,487	50.4%	11.2%	22.2%
HR	993	468	1,927	497	1,760	3,687	238	24.6%	6.4%	26.2%
HU	4,613	995	6,810	1,903	3,167	9,977	252	8.7%	2.5%	29.0%
IE	3,677	1,483	5,976	1,757	3,855	9,832	256	7.9%	2.6%	33.0%
IT	11,093	4,402	20,807	4,571	15,520	36,327	2,000 ^b	22.3%	5.5%	24.7%
LT	1,587	753	3,021	314	1,162	4,183	403	37.7%	9.6%	25.5%
LU	100	41	164	129	301	465	35	20.7%	7.6%	36.6%
LV	1,110	438	1,722	287	745	2,467	255 ^c	35.2%	10.3%	29.4%
MT	33	9	43	8	117	160	2	13.2%	1.4%	10.9%
NL	1,693	964	3,411	576	1,488	4,899	95 ^a	6.2%	1.9%	31.4%



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Country	Basic & coupled income	Eco-schemes	Total Pillar 1	Env, Clim, Welfare	Total Pillar 2	Total CAP	Total Organic	Org/ Env	Org/ CAP	Env/ CAP
PL	10,804	4,334	17,398	1,652	7,580	24,978	905	15.1%	3.6%	24.0%
PT	2,263	874	3,848	484	2,772	6,620	395	29.1%	6.0%	20.5%
RO	6,290	2,447	9,935	1,706	5,676	15,611	389	9.4%	2.5%	26.6%
SE	2,482	680	3,462	840	2,558	6,020	351	23.1%	5.8%	25.3%
SI	513	102	687	329	1,082	1,769	93 ^e	21.7%	5.3%	24.3%
SK	1,247	559	2,083	642	2,014	4,097	180	15.0%	4.4%	29.3%
EU	119,728	44,713	196,858	33,212	107,137	303,995	15,809	20.3%	5.2%	25.6%

2027 land areas and 2028 expenditures normally used, as payments made in year following. Figures are for total public expenditure, including national co-financing.

- a. Planned organic expenditure values for FR and NL eco-schemes have been estimated from per hectare rates and R29 indicators.
- b. For IT, no organic expenditure data were included in the CSP, this value is taken from the published CSP summary document for Italy¹¹
- c. LV includes the Eco-scheme for agroecological practices on organic farms.
- d. FR planned organic expenditure estimate includes Corsica and overseas dominions, but excludes 871.6 M€ top-ups from regional governments and water agencies
- e. Including separate apiculture scheme

Source: own compilation based on Lampkin and Sanders (2022), national CSPs and EU planned expenditure dataset¹²

¹¹ https://agriculture.ec.europa.eu/system/files/2023-11/csp-at-a-glance-italy_en.pdf, accessed 20.01.04

¹² https://agriculture.ec.europa.eu/cap-my-country/cap-strategic-plans_en, accessed 20.01.24. Spreadsheet Overview of EU countries' CAP Strategic Plans included under Documents on this page.



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2.2. Maintenance and conversion support

The data on expenditure set out above are almost exclusively related to support for conversion to and maintenance of organic farming, as other support is generally not differentiated according to organic status (see Section 2.3). Conversion and maintenance support were first introduced as Pillar 2 agri-environmental accompanying measures in 1994 (CoE, 1992). Conversion support is aimed at land in transition from non-organic to organic production, and usually covers at least the first 2-3 years of organic management when the products cannot be sold as organic. In some cases, conversion support is extended to the full period of a five-year agreement. Maintenance support usually covers land which has reached full organic status, and although traditionally managed under five-year agreements, has usually been extended to ensure continuity in subsequent CAP programming periods.

Under the new CAP Regulation, MS could choose to support conversion to and maintenance of organic farming either as a Pillar 1 Ecoscheme (Art. 31), fully-funded by the EAGF, or as a Pillar 2 RDP agri-environment measure (Art. 70), part-funded by EAFRD and part by national co-financing. The Pillar 1 option has some potential advantages over previous Pillar 2-based arrangements, including:

- 100% EU-financing;
- predictability of the number of organic producers likely to apply for support;
- flexibility in terms of annual or longer agreements, which may be attractive to producers uncertain about market or tenancy prospects for longer periods;
- some additional flexibility in determining the payments per ha compared with the strictly income-forgone/additional costs model for Pillar 2.

While most MS continued to use Pillar 2 for both conversion and maintenance payments (Table 2.4), Denmark used only Pillar 1, and some MS used combinations, either specifically to support conversion with longer term agreements (e.g. FR-HX, GR), or to cover specific aspects of schemes, such as payments for livestock production (e.g. LT). In mainland France (FR-HX), the decision was taken after the CSP agreements were finalised, to use both approaches to support farmers converting, whereby they receive the Pillar 1 organic eco-scheme payment on the same basis as established organic farmers, as well as additional Pillar 2 support for conversion. Several countries (last row of Table 2.5), and some regions in ES and IT, make no differentiation between conversion and maintenance payments, an issue which is discussed in more detail below.



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Table 2.5: Funding sources for organic conversion, maintenance support, 2023-2027

	Pillar 1 EcoScheme	Both	Pillar 2 RDP AECM
Conversion	LT	FR-HX ^a	BE-VLA, GR
Maintenance	BE-VLA, GR, FR-HX ^a	LT ^d	
Both conversion and maintenance	DK	BG ^c , EE ^c , PT ^e	BE-WAL, CZ, DE, ES, FR-DO ^a , HU, IE, IT, LU, MT, PL, RO
No differentiation^f	NL, SE	LV ^b	AT, CY, FI, HR, SI, SK

- a. FR-HX: Mainland; FR-DO: Overseas dominions; Farms in conversion get both the Pillar 1 Eco-scheme payment as for fully organic farmers and the Pillar 2 conversion scheme payment. This change was introduced in 2023 after the CAP Strategic Plan was finalised
- b. LV Eco-scheme: Agro-ecological practices for organic farms
- c. Organic livestock supported separately as Eco-scheme in BG and as Pillar 2 scheme in EE
- d. LT Support for training (1 year only) and maintenance of cereals and permanent grassland in Pillar 2
- e. PT Pillar 2 schemes for conversion and maintenance in Madeira
- f. The EU framework does not apply to CH, but CH also does not differentiate between conversion and maintenance at Federal level, although some Cantons offer additional conversion support¹³

Source: own compilation based on published agreed CAP Strategic Plans

A detailed analysis of the maintenance and conversion payments (see Tables 9.1a-d and 9.2a-d in the Annex (Section 9)) indicates both continued and in some cases increased variability in payment rates within and between countries compared with the previous CAP programming period (Figure 2.2, see also Lampkin and Sanders, 2022), and also variations in approach to increasing payments for the 2023-2027 period (Table 2.6). A few countries have increased payments, while others have made significant increases, notably FR and NL with the (re)introduction of support payments and MT with very large increases intended to incentivise organic production in the context of small-scale, horticultural systems. The majority of countries have made more modest increases to their payment rates. To the extent that payments are intended to be based on income forgone calculations, the decision of some countries to keep payments constant or with very limited changes for periods of up to 13 years (2015-2022 and 2023-2027) is notable.

¹³ <https://www.bioaktuell.ch/grundlagen/umstellung/allgemein/kosten-und-beitraege>, accessed 24.01.24

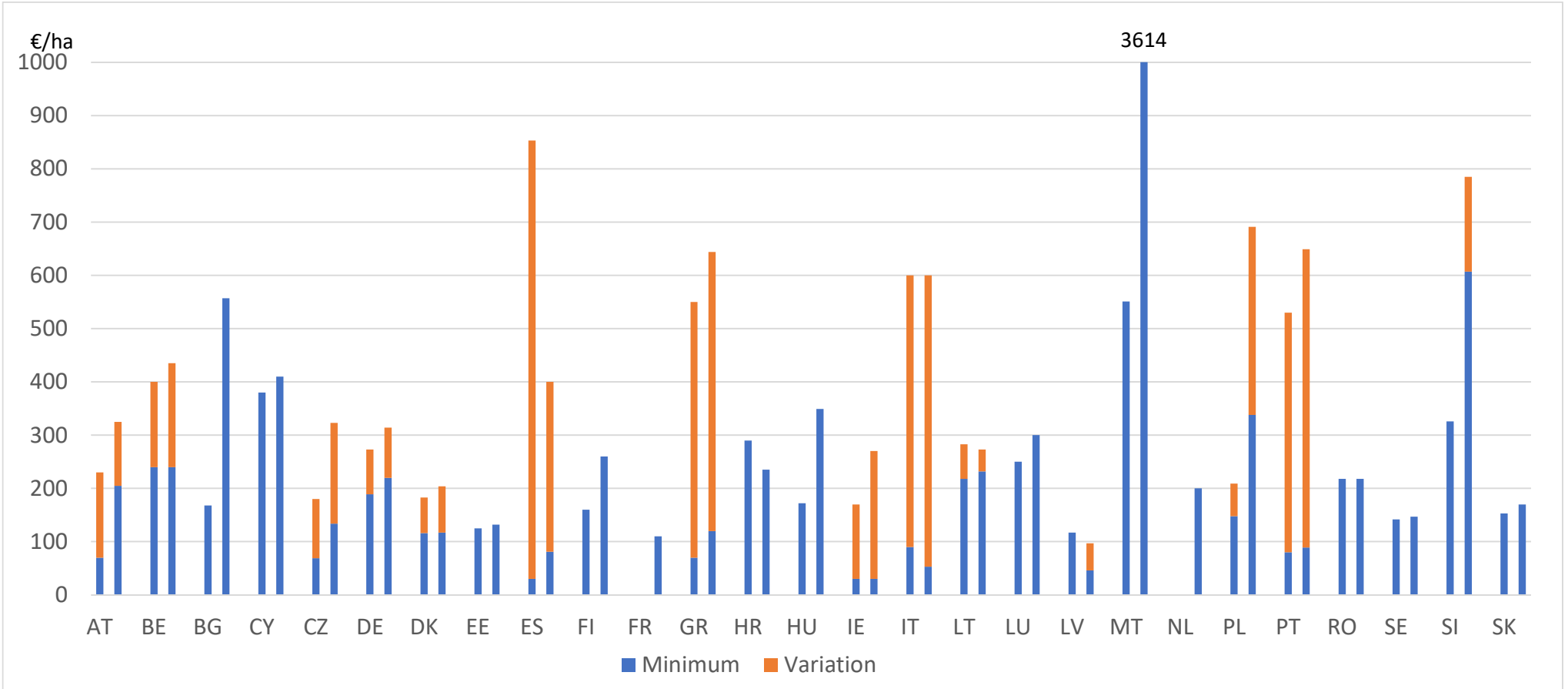


Figure 2.2: Comparison of organic maintenance payments for arable land in EU27 MS, 2019 (left column) and 2023 (right column)

LV values exclude Agroecology for Organic Farming Eco-Scheme; CH payments for arable maintenance = 1200 CHF or 1079 €/ha at 2019 exchange rates
Source: own compilation based on Lampkin and Sanders (2022) and national CAP Strategic Plans



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Table 2.6: Organic maintenance and conversion payment rate changes in EU27 MS, 2023 compared with 2019

Reduced payments	Few or no changes	Increased payments	Most payments more than doubled
AT, BE, ES	DK, HR ^a , IT, PT, RO, SE (CH)	BG, CY, CZ, DE, EE, FI, GR ^b , HU ^b , LT, LU ^b , LV, PL ^c , SI, SK	FR-HX, IE, MT, NL

- a. conversion payments reduced to maintenance level
 - b. conversion payments more than doubled in some cases, typically horticultural crops
 - c. conversion payments reduced
- Source: own compilation from national CAP Strategic Plans and Lampkin and Sanders (2022)

Figure 2.2 illustrates the variability in payment rates, both within and between MS, comparing 2023 with 2019 taking arable maintenance payments as an example. Further details on reasons for variability are provided in Tables 2.5 and 2.6, but the primary reasons are:

- regional differences, particularly within countries with devolved responsibilities for agricultural policy (BE, DE, ES, IT) where differing policy priorities may be relevant;
- land-use differentiation – some countries operate with broad land use categories such as arable or grassland, others more with specific payments for individual crops or livestock categories (which potentially have implications for market development);
- livestock production payments determined on a livestock unit (LU) basis and the number of animals covered by an agreement, sometime then converted to a per ha basis (again with potential impacts on production and markets);
- payment degression on larger land areas;
- differences in intervention rates as a proportion of calculated costs and income forgone.

The high degree of variability in payment rates has implications for the development of the organic market in the EU single-market context, and may also raise questions about the methods used to calculate payment rates in individual MS. Payment rates for these measures have traditionally been calculated on an income-forgone, additional-costs basis, although the methods used for the calculations can vary widely. Yields, stocking rate and variable input costs differences are normally included. While the higher prices for organic food (not available during the conversion period) are supposed also to be included, not all producers will get access to the higher prices and the costs of market development to obtain these prices are normally not considered.

In theory, conversion support based on an income-forgone calculation should normally be higher than maintenance support. This would be expected due to:

- lack of access to organic premium prices during the official 2-year (for annual crops) or 3-year (for perennial crops) conversion period (some livestock enterprises might take even longer);



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- higher yield reductions during the conversion period while rotations are being restructured and full benefits are yet to be realised, and due to mistakes made as part of the learning process;
- increased breeding livestock, building and machinery investment costs as farming systems are restructured;
- training, advisory and other information costs linked to the conversion period.

These higher costs of conversion have long been documented (Lampkin & Padel, 1994) but in many countries no additional payments are made during conversion (see Table 2.4), and in others such as Spain and Italy, flat rate 10% or 20% increases may be applied, which do not fully reflect the additional costs involved.

A reason given by some, e.g. in Austria, is that if the full costs of conversion were to be covered, this could result in very high payments that might attract farmers to only join schemes for the conversion period and to revert subsequently. There is anecdotal evidence that some MS have deliberately applied a lower intervention rate to reduce the perception of a too high incentive to convert. It is likely that conversion payments at best only cover part of the costs of conversion, and that their relevance to producers is as a form of risk-sharing rather than full compensation for the income losses and costs involved.

The other environmental components of Pillar 1 (eco-schemes) and Pillar 2 (agri-environment-climate-animal welfare measures) are potentially highly relevant to organic producers, permitting them to deliver further environmental benefits to those already being delivered under the organic conversion and maintenance schemes. We have not been able to conduct a full analysis of scheme combinability issues in each country on the basis of the published CSPs. We have identified that Austria included a broader range of biodiversity measures in its organic farming support, and Latvia has implemented a Pillar 1 eco-scheme 'agro-ecological practices for organic farming' which provides additional support to the basic LV organic scheme. However, concerns about double-funding often lead to combinations of organic and other environmental support being excluded (Lampkin and Sanders, 2022), or higher than necessary payment deductions being made. If the full income forgone and additional costs are in any case not being funded due to reduced intervention rates, then there is a case that the unfunded part should at least cover some if not all of any double funding.

In some cases, the relationships between alternative schemes may be competitive. For example, with non-use of pesticides or fertilisers, payments to the non-organic farmers may be higher than for organic farmers due to the inclusion of organic premium prices in the income-forgone calculations. Alternatively, non-organic farmers may be able to select a combination of no pesticide, no fertiliser and extensive grassland eco-schemes, where the combined payments are higher than the organic farming payments, even though the same outcomes and more are being delivered by the organic farmers.



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A further problem has emerged recently, following the first year of implementation of the new eco-schemes. In a few cases where support for organic and non-organic farmers is combined in the same eco-scheme, as in France and the Netherlands, higher than expected uptake of the schemes by non-organic producers may lead to payment rate reductions that will also impact on the organic producers, even though uptake by organic farmers is below target.

These situations can act as disincentives to farmers converting to organic production, as the alternatives may appear more attractive, even though the willingness to provide support exists and funding is available. Further consideration is needed as to how these situations can be resolved, for example by:

- ensuring that organic support payments match or exceed alternative support combinations;
- taking account of lower intervention rates in assessing double-funding deductions, or;
- excluding organic premium prices from the organic support calculations, as it can be argued that they are more a reflection of the marketing and entrepreneurial activities undertaken by the farmer.

2.3. Rural development and other organic support

While organic conversion and maintenance support is the easiest to identify and document in the CSPs, there are several other forms of support that organic farmers can obtain. The level of support in these contexts is not easy to quantify as organic participation is normally not specifically identified, for example on a project-by-project basis.

Under Pillar 1 (EAGF), organic farmers normally qualify for basic and coupled income support, as well as support for young farmers and individual commodities (cotton, olives, wine, hops etc.), on the same basis as other farmers, with no special advantages in terms of priority or payment levels. In the last programming period, organic farmers qualified de facto for the Greening component of the basic payment, an advantage that has not been carried forward to the new CAP. However, many organic horticultural producers may be too small to be eligible for basic payments, particularly in MS that have not implemented small farm schemes. Also included in Pillar 1 is Sectoral support, e.g. for Apiculture and for Fruit and Vegetables Producer Organisations. A couple of organic-specific apiculture schemes were identified in this context.

Under Pillar 2 (EAFRD), the following categories of support are relevant to organic farming and may qualify for differentiated treatment:

- Areas with natural constraints (Art. 71)
- Areas with specific disadvantages (Art. 72)
- Investments (Arts. 73, 74)



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- Start-ups (Art. 75)
- Risk management (Art. 76)
- Co-operation (Art. 77)
- Knowledge (Art. 78)

We have not been able to complete a detailed analysis of these measures in connection with organic farming based on the CSPs, as in most cases organic farming was not specifically identified. For areas with natural constraints and areas with specific disadvantages, we are not aware of any specific provisions for organic farming. Usually, such situations are covered by the payment levels for organic conversion and maintenance.

Investment and Start-up schemes are more likely to attract specific organic provisions, including for producers and processors. This is usually in the form of higher grant payments, for example 50% instead of 40% contributions, or the prioritisation of organic applicants where funds are limited. Some specific examples are given in Lampkin and Sanders (2022). Investment aids are mentioned frequently in MS national organic action plans (see Chapter 3) so we assume that such funding could be quite significant, also in future periods. However, as organic projects are not separately identified in RDP reporting statistics, or in the CSPs, we are not able to quantify this.

Risk management is not yet widely used by MS or planned by them for the 2023-2027 period. The schemes focus particularly on severe weather conditions or severe pest and disease outbreaks. We assume that organic farmers would qualify on the same basis as other producers and we are not aware of any specific examples targeting organic farmers.

Co-operation and Knowledge projects, including farm advisory services, European Innovation Partnership operational groups and training, as well as co-operative initiatives for supply chain co-ordination and capacity building, are also used by organic farmers. These are highly important for the development of organic food and farming, and feature extensively in MS OAPs, but again statistical data on past uptake and specific references in the CSPs are lacking.

There are two further areas of EU funding for organic farming that are not directly part of the CAP: funding for consumer promotion campaigns and for research, e.g. under Horizon 2020 and Horizon Europe. These were not a specific focus for this part of the study, but do also feature in MS OAPs, where research using national funding may also be significant. However, 42 M€ has been allocated at EU-level for organic promotion campaigns in 2024, subject to MS and industry match-funding¹⁴. The EU Commission reports that in the Horizon 2020 programme (from 2014-2020), more than 50 M€ were allocated to organic specific research projects (DG Agri, 2023b)¹⁵.

¹⁴ https://ec.europa.eu/commission/presscorner/detail/en/ip_23_5816, accessed 20.01.24

¹⁵ https://agriculture.ec.europa.eu/system/files/2023-04/agri-market-brief-20-organic-farming-eu_en.pdf, accessed 20.02.24



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3. National Organic Action Plans

3.1. Action plan principles

Organic action plans have been widely used at EU, national and regional levels since the mid-1990s (Meredith *et al.*, 2018; Lampkin & Sanders, 2022). Key features of organic action plans include:

- a. setting (relevant, ambitious and resourced) development targets, e.g. 25% of land area by 2030, but targets can also be market-focused and sometimes relate to information activities including research;
- b. recognising the dual role of organic farming as delivering both public goods (environmental and other benefits) and market products, and integrating policies to deliver both;
- c. identifying specific local needs/priorities as the basis for specific actions;
- d. building and strengthening public/private partnerships;
- e. integrating supply-push and demand-pull measures (Table 3.1), in order to resolve policy conflicts and maximise synergies, and to support stronger links between producers, food businesses and consumers.

Table 3.1: Typical measures in organic action plans, by type and focus

Focus	Supply push	Demand pull
Public good	<ul style="list-style-type: none"> • Area support • Information, advice • Training, education • Professional events • Research, data • Capacity building 	<ul style="list-style-type: none"> • Tax incentives (e.g., VAT) • Public events • School initiatives (farm visits, gardens, cooking) • Public information • Promotion
Market	<ul style="list-style-type: none"> • Capital investments • Producer groups • Meet the buyer events • Supply hubs • Market analyses 	<ul style="list-style-type: none"> • Organic regulations • Consumer promotion • Public procurement • Hospitality catering

Source: own compilation

3.2. EU Organic action plans

The European Commission has published three action plans for organic farming. The first, published in 2004 and covering the period to 2010 (EC, 2004), focused mainly on measures to improve organic regulations, but also highlighted opportunities for MS to use the RDP measures to broaden support for organic farming. The second, published in 2014 and covering the period to 2020 (EC, 2014), focused on three areas to increase the competitiveness of EU organic producers, by increasing awareness of and synergies with EU instruments targeting organic production; addressing technical gaps in organic



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production, with research, innovation, and their dissemination; and increasing information on the organic production sector, as well as on the market and trade.

The current EU action plan, published in 2021 for the period to 2030 (EC, 2021a)¹⁶, specifies three Axes:

1. Organic food and products for all: stimulate demand and ensure consumer trust;
2. On the way to 2030: stimulating conversion and reinforcing the entire value chain;
3. Organics leading by example: improving the contribution of organic farming to sustainability.

The main targets and actions are summarised and contrasted with the previous action plan in the following Tables and in Tables 9.3q and 9.4n in the Annex, alongside similar details for MS OAPs. In addition to the specific actions, the Commission urged MS to develop national strategies for organic farming and for aquaculture, the results of which can be seen in the following section and Part B of this report. The Commission has subsequently published a report on progress with delivery of the EU action plan (EC, 2023a)¹⁷.

While the EU action plans provide a relevant framework to actions at the European level, they are not necessarily a template for OAPs at national or more local level, which should reflect local development needs and priorities in the context of relevant targets. Indeed, the EU action plans are, for good reason, often focused on actions that can be taken by the European Commission, and therefore may not have the level of stakeholder engagement that would be desirable for regional or national action plans.

3.3. Implementation of action plans by MS

The encouragement by the Commission for MS to develop national strategies, also as part of the negotiations on the CSPs, does seem to have had some impact. All but two MS (GR and LT) have organic action plans currently being implemented or due to be launched in early 2024 (Figure 3.1, green bars). This is a significant change compared with the last programming period where several MS had no action plan in place or a significant time gap since the previous action plan (Figure 3.1, blue bars) (Lampkin & Sanders, 2022). Some countries like DK were early adopters and have continued to evolve their plans to be more focused, whereas others have been less consistent.

We have analysed all the published current and previous action plans (see list below) to assess their scope and the nature of changes made between the two periods. Some highlights are presented in Tables 3.3a-d and 3.4a-d, with further details of actions summarised in Tables 9.3a-q and 9.4a-n in the Annex. As part of the analysis, we have focused on three broad areas of activity: production, markets and information, and

¹⁶ https://agriculture.ec.europa.eu/farming/organic-farming/organic-action-plan_en, accessed 20.01.24

¹⁷ https://agriculture.ec.europa.eu/system/files/2023-09/organic-action-plan-report-sept23_en.pdf, accessed 20.01.24



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identified 13 key themes under these heading (Table 3.2). Several of the plans also included data on administrative arrangements, including monitoring and evaluation, steering groups, delivery partners and finances, but as most did not, we have not analysed these aspects in detail. (It was not our intention to evaluate the quality of the plans or delivery performance, more to assess changes in scope).

Table 3.2: Categories used for analysing national and EU organic action plans

Production	Markets	Information
Area support (eco-schemes, agri-environment) Investment aids	Investment aids Group initiatives Public procurement Tourism, gastronomy Exports, trade fairs National logos, branding Certification, regulation	Public/consumer information Advice, demonstration Training, education Research, innovation Statistics, market data

Source: own compilation

Tables 3.3a-d and 3.4a-d summarise the main targets and areas of activity in the current/planned and previous action plans in each country. The letters a-z in each case in Table 3.4a-d relate to summary notes of the main actions that can be found in Annexes 9.3 (for production and market actions) and 9.4 (for information actions).

In broad terms, most of the action plans had defined targets (Table 3.3a-d), although while almost all had land area targets, explicit or implicit from related policies, fewer had market or other targets, for example with respect to share of total retail sales or share of public procurement. Many had a wide range of action points under each of the 13 key themes, arguably too many to be well-focused on priorities in some cases. Denmark, by contrast, which has a long history of action plans for organic farming, has become more focused on fewer actions, in part because earlier actions have now become well-established and integrated in normal practice. A few, for example RO and CY, were modelled closely on the most recent EU OAP (EC, 2021a) with a parallel set of actions.

Most current action plans indicated, at least as far as could be ascertained by textual analysis, increases in the scope of policy support compared with previous action plans, although a number appeared to be continuing actions started in the previous period, and a few were undertaking less than they had done previously. However, none contained a substantial increase in scope that might be considered necessary to deliver transformational change and the EU’s 25% target, or the more ambitious national targets.

Only a few plans contained concrete financial commitments or specific project proposals. There is a risk that broad statements of intent, without defined tasks or projects, finances and ownership, may struggle to be implemented. However, it is also the case that the plans were strongly linked to the CSPs and/or RDPs in previous periods. Many of these would require private actors to submit project proposals, with no ring-fenced budget for organic activities. Areas that are more the focus of national funding, such as public procurement or research, tended to have more specific funding or target commitments.

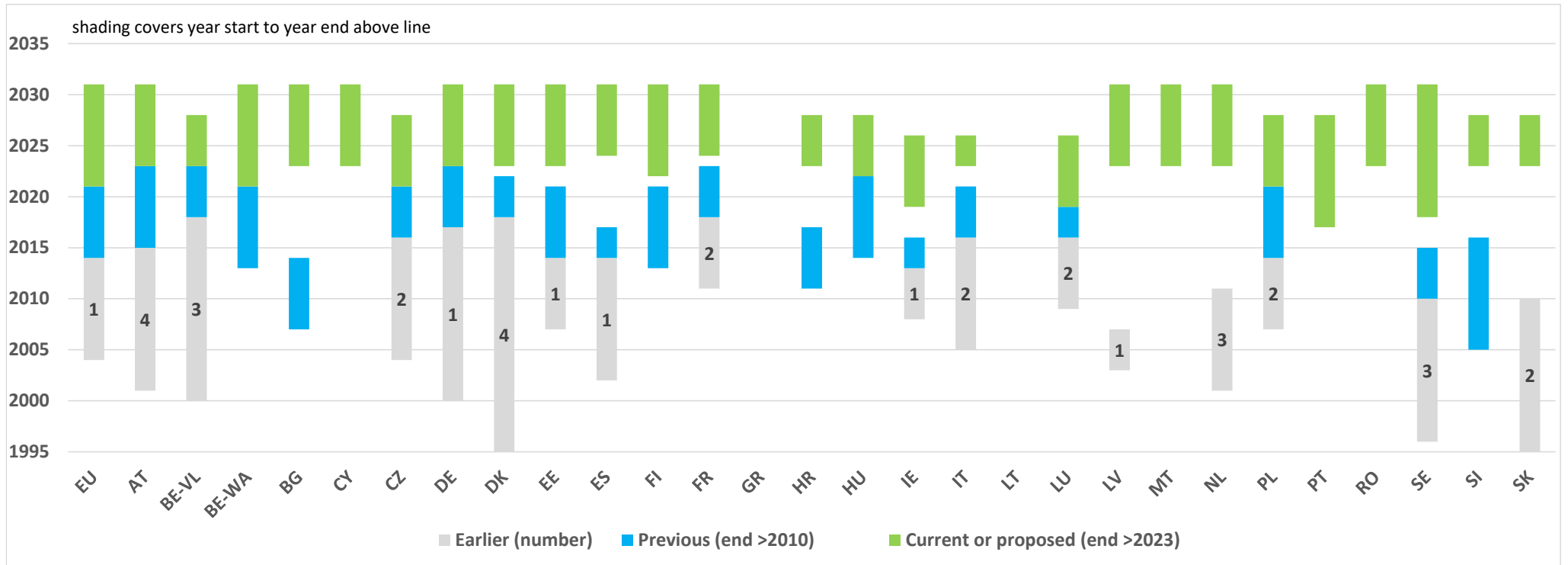


Figure 3.1: Periods (years) covered by current/planned (ending after 2023), previous (ending after 2010) and earlier organic action plans in EU Member States

Source: own compilation based on Lampkin and Sanders (2022) and published organic action plans (see list on next two pages)
The green and blue shaded action plans are analysed in more detail in subsequent Tables and the related Annexes

List of action plan documents used

- AT Current: Aktionsprogramm Biologische Landwirtschaft 23+. Bundesministerium Land- und Forstwirtschaft, Regionen und Wasserwirtschaft. Wien (2023)
Previous: 5. Aktionsprogramm Biologische Landwirtschaft 2015-2020. Bundesministerium Land- und Forstwirtschaft, Umwelt und Wasserwirtschaft. Wien (2015)
- BE No national plans
- BE-VLA Current: Strategisch Plan Bio 2023-2027. Bio van boer tot bord: 5 x 5% Vlaamse ambities op maat. Departement Landbouw & Visserij, Brussels (2023)
Previous: Strategisch plan biologische landbouw 2018-2022. Samen naar meer en betere biologische landbouw. Departement Landbouw & Visserij, Brussels (2018)
- BE-WAL Current: Plan de Développement de la Production Biologique en Wallonie a l'Horizon 2030. Département du Développement, de la Ruralité et des Cours d'eau et du Bien-être animal. Namur (2021)
Previous: Plan Strategique de Développement de l'Agriculture Biologique en Wallonie a l'Horizon 2020. Département du Développement, de la Ruralité et des Cours d'eau et du Bien-être animal. Namur (2013)
- BG Current: Not yet published, expected early 2024
Previous: National Plan for Development of Organic Farming in Bulgaria 2007–2013. Ministry of Agriculture and Forestry. Sofia (2006)
- CY Current: National Organic Production Action Plan for the Years 2023-2030 – list of action points. Ministry of Agriculture, Rural Development & Environment. Cyprus (2023)
Previous: No plan published
- CZ Current: Akčníplan ČR pro rozvoj ekologického zemědělství v letech 2021–2027. Ministerstvo Zemědělství. Prague (2021)
Previous: Akčníplan ČR pro rozvoj ekologického zemědělství v letech 2016–2020. Ministerstvo Zemědělství. Prague (2016)
- DE Current: Bio-Strategie 2030. Nationale Strategie für 30% ökologische Land- und Lebensmittelwirtschaft bis 2030. Bundesministerium für Ernährung und Landwirtschaft. Berlin (2023)
Previous: Zukunftsstrategie ökologischer Landbau (2017-2022). Bundesministerium für Ernährung und Landwirtschaft. Berlin (2nd edition, 2019)
- DK Current: Not yet published, expected early 2024
Previous: Vækstplan for dansk økologi. Miljø- og Fødevareministeriet. Copenhagen (2018)
- EE Current: Mahepõllumajanduse edendamise tegevuskava aastateks 2023–2030 Regionaal- ja Põllumajandusministeerium. Tallinn (2023)
Previous: Estonian Organic Farming Development Plan 2014-2020. Annex I to Ministerial Decree No 95. Ministry of Agriculture. Tallinn (2014)
- ES Current: Not yet published, expected early 2024
Previous: Plan not analysed as not located
Alternative: Andalucía Regional OAP: III Plan Andaluz de la Producción Ecológica Horizonte 2020. Consejería de Agricultura, Pesca y de Desarrollo Rural. Seville (2016)
- FI Current: Organic 2.0 – Finland's National Programme for Organic Production 2030. Ministry of Agriculture and Forestry. Helsinki (2021)
Previous: More organic! Government development programme for the organic product sector and objectives to 2020. Government Resolution 16.05.2013. Ministry of Agriculture and Forestry. Helsinki (2013)
- FR Current: Not yet published, expected early 2024
Previous: Programme Ambition Bio 2022. Plan d'actions des acteurs de l'agriculture et de l'alimentation en France. Ministère de l'Agriculture et de l'Alimentation. Paris (2018)
- GR No plans published
- HR Current: Prijedlog nacionalnog akcijskog plana razvoja ekološke poljoprivrede 2023-2030. Ministarstvo poljoprivrede. Zagreb (2023)
Previous: Akcijski plan razvoja ekološke poljoprivrede 2011-2016. Ministarstvo poljoprivrede. Zagreb (2011)
- HU Current: Nemzeti Cselekvési Terv az Ökológiai Gazdálkodás Fejlesztéséért (2022-2027). Ministry of Agriculture. Budapest (2022)
Previous: Nemzeti Akcióterv az Ökológiai Gazdálkodás Fejlesztéséért (2014-2020). Vidékfejlesztési Minisztérium. Budapest (2014)



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- IE Current: Review of Organic Food Sector and Strategy for its Development 2019 – 2025. Department of Agriculture, Food and the Marine. Dublin (2019)
Previous: Organic Farming Action Plan 2013 – 2015. Department of Agriculture, Food and the Marine. Dublin (2013)
- IT Current: Piano d'azione nazionale per la produzione biologica e I prodotti biologici 2023-2025. Ministero dell'agricoltura, della sovranità alimentare e delle Foreste. Rome (2023)
Previous: Piano strategico nazionale per lo sviluppo del sistema biologico (2016-2020). Ministero delle politiche agricole, alimentari e forestali. Rome (2016)
- LT No plans published
- LU Current: Pan-Bio 2025 – Nationaler Aktionsplan zur Förderung der biologischen Landwirtschaft. Ministerium für Landwirtschaft, Weinbau und ländliche Entwicklung. Luxemburg (2019)
Previous: Plan d'action national de la promotion de l'agriculture biologique (2016-2018). Ministère de l'Agriculture, de la Viticulture et de la Protection des Consommateurs. Luxembourg (2016)
- LV Current: Bioloģiskās lauksaimniecības attīstības rīcības plans 2023–2030. Ministry of Agriculture. Riga (2023)
Previous: No plan published
- MT Current: National Action Plan for Organic Food 2023-2030. Ministry for Agriculture, Fisheries and Animal Rights. Malta (2023)
Previous: No plan published
- NL Current: Groei van biologische productie en consumptie. Actieplan 2023-2030. Ministerie van Landbouw, Natuur en Voedselkwaliteit. Den Haag (2022)
Previous: Not consulted as pre-2010
- PL Current: Ramowy Plan Działań dla Żywności i Rolnictwa Ekologicznego w Polsce na lata 2021 – 2027. Ministertwo Rolnictwa i Rozwoju Wsi. Warsaw (2021)
Previous: Ramowy Plan Działań dla Żywności i Rolnictwa Ekologicznego w Polsce na lata 2014 – 2020 (zaktualizowany 5 czerwca 2018 r.). Ministertwo Rolnictwa i Rozwoju Wsi. Warsaw (2018)
- PT Current: Estratégia Nacional para a Agricultura Biológica (2017-2027). Ministério da Agricultura, Florestas e Desenvolvimento Rural. Lisbon (2017)
Previous: No plan published
- RO Current: Planul Național de Acțiune Pentru Dezvoltarea Producției Ecologice din România (2023-2030). Ministerul Agriculturii și Dezvoltării Rurale. Bucharest (2023)
Previous: No plan published
- SE Current: Åtgärdsplan för att öka produktion, konsumtion och export av ekologiska livsmedel. Jordbruksverket. Jönköping (2018)
Previous: Utveckling av ekologisk konsumtion och produktion 2011-2013 – förslag till strategi. Ekologiskt Forum. Royal Swedish Academy of Agriculture and Forestry. Stockholm (2010) (proposal for strategy, final document not obtained, previous plan pre-2010, therefore not analysed)-
- SI Current: Action Plan for the Development of Organic Farming until 2027. Republic of Slovenia Ministry of Agriculture, Forestry and Food. Ljubljana (2022)
Previous: Action Plan for Development of Organic Farming in Slovenia by 2015. Government of the Republic of Slovenia. Ljubljana (2005)
- SK Current: Národný akčný plan pre rozvoj ekologickej poľnohospodárskej výroby v Slovenskej republike pre roky 2023-2027. Ministry of Agriculture and Rural Development of the Slovak Republic. Bratislava (2023)
Previous: Not analysed as pre-2010
- EU Current: Action Plan for the Development of Organic Production. Communication COM(2021) 141. European Commission. Brussels (2021)
Previous: Action Plan for the future of Organic Production in the European Union. Communication COM(2014) 179. European Commission. Brussels (2014)
- CH No national plans; Aargau Canton OAP analysed
- CH-AG Previous: Organic Action Plan for Aargau (2019-2021). Produced by FIBL as part of SME Organics project. Frick (2018)
- NO Current: Nasjonal strategi for økologisk jordbruk 2018-2030. Landbruks- og matdepartementet. Oslo (2018)
Previous: Not analysed

Table 3.3a: Summary of key data and quantitative goals comparing current/planned and previous organic action plans in AT, BE, BG, CY, CZ and DE

Country	Current action plan period	Previous action plan period	Earlier action plans (n)	Start of first action plan	Current production target (by year)	Previous production target (by year)	% UAA actual (2021)	Current market target (by year)	Previous market target (by year)	% market share (2021)	Other major targets
AT	2023-2030	2015-2022	4	2001	30% UAA by 2027 35% UAA by 2030	20% UAA by 2016 more by 2020	26.5	-		11.6	2022: 100% of organic products sold as organic
BE	No plan	No plan	0	-	-	-	7.5	-	-	3.8	-
BE-VLA	2023-2027	2018-2022	3	2000	5% of UAA, farms by 2027	More than 1.1%	1.6	5% of market by 2027	-	3.4	2027: 5% livestock production, 5% procurement
BE-WAL	2021-2030	2013-2020	1	2013	30% of UAA by 2030	14% of UAA by 2020	12.5	15% of market by 2030	3% of market by 2020	5.0	2030: 18% of market for selected products
BG	2023-2030p	2007-2013	0	2007	-	8% UAA by 2013	1.7	'organic for all'	3% of market by 2013	1.0	2030: Improved legislation, certification, research
CY	2023-2030	No plan	0	2023	7.5% of UAA by 2025	-	5.7	-	-	-	-
CZ	2021-2027	2016-2020	2	2004	22% of UAA by 2027	15% of UAA by 2020	15.8	4% of market by 2027	3% of market by 2020	1.8	2027: 30% arable share of organic, 5% of procurement; see Annex
DE	2023-2030	2017-2022	1	2001	30% of UAA by 2030	20% of UAA by 2030	10.8	-	-	7.0	2027: 30% of food in federal govt institutions

Source: own compilation based on published action plan documents (see list above) and FIBL Statistics for % UAA and % market shares

Table 3.3b: Summary of key data and quantitative goals comparing current/planned and previous organic action plans in DK, EE, ES, FI, FR, GR, HR and HU

Country	Current action plan period	Previous action plan period	Earlier action plans (n)	Start of first action plan	Current production target (by year)	Previous production target (by year)	% UAA actual (2021)	Current market target (by year)	Previous market target (by year)	% market share (2021)	Other major targets
DK	2023/4-2030p	2018-2021	4	1995	Not yet published, due 12/23	> than 9.2% in 2017	11.4	Not yet published, due 12/23	> than 10.5% in 2017	13.0	
EE	2023-2030	2014-2020	1	2007	14% agric. Output value by 2030	180kha (18% UAA) by 2020	23	-	-	5.0	2030: 20% regular consumers; 2x processing value; exports > 80M€
ES	2024-2030p	2014-2016	1	2002	Not yet published, due 2024	?	10.8	Not yet published, due 2024	?	2.5	2014-2016 plan not located
ES-AND	-	2016-2020	1	2002	-	-	>30	-	-	-	2020 actual: 1.1Mha (45% ES org. land)
FI	2022-2030	2013-2020	0	2013	25% of UAA by 2030	20% of UAA by 2020	14.4	5% market share by 2030	3x 2012 market share	2.5	2030: 25% (2020 20%, actual 15%) of public catering
FR	2024-2030p	2018-2022	2	2011	Not yet published, due 2024	15% of UAA by 2022	9.6	Not yet published, due 2024	-	6.6	2027: 18% of UAA in CSP; 2022: 20% of procurement
GR	No plan	No plan	0	-	-	-	10.2	-	-	0.3	-
HR	2023-2027	2011-2016	0	2011	12% 2027 (CSP)	8% of UAA by 2016-	8.1	-	-	2.2	2016: 30% annual processing growth
HU	2022-2027	2014-2021	0	2014	10% of UAA by 2027	-	5.9	5% market share by 2027	-	0.3	2027: 2x no. of certified processors, 20% procurement

Source: own compilation based on published action plan documents (see list above) and FIBL Statistics for % UAA and % market shares

Table 3.3c: Summary of key data and quantitative goals comparing current/planned and previous organic action plans in IE, IT, LT, LU, LV, MT, NL and PL

Country	Current action plan period	Previous action plan period	Earlier action plans (n)	Start of first action plan	Current production target (by year)	Previous production target (by year)	% UAA actual (2021)	Current market target (by year)	Previous market target (by year)	% market share (2021)	Other major targets
IE	2019-2025	2013-2015	1	2008	Sector targets	Increase	1.9	Sector targets	-	2.7	2025: e.g. increase cereals to 5 kha, milk 10% annually; 2030 (new): 10% UAA
IT	2023-2025	2016-2020	2	2005	25% of UAA by 2027	50% more (16% of) UAA by 2020	16.7	-	30% more (5M€, 4.5%) retail sales	3.4	
LT	No plan	No plan	0	-	-	-	8.9	-	-	1.0	-
LU	2019-2025	2016-2018	2	2009	20% of UAA by 2025	-	5.2	-	-	11.0	2050: 100% UAA 2025: 20% public procurement
LV	2023-2030	No recent plan	1	2003	25% of UAA by 2030	-	14.8	-	-	1.5	2030: org. output 8% of LV total; 7% annual awareness increase
MT	2023-2030	No plan	0	2023	5% of UAA by 2030	-	0.6	-	-	-	2030: 500 ha land
NL	2023-2030	No recent plan	3	2001	15% of UAA by 2030	-	4.2	Increase	-	3.3	2030: 25% public procurement, incr. knowledge, innovation
PL	2021-2027	2014-2020	2	2007	19% UAA (CSP)	-	3.5	-	-	0.6	

Source: own compilation based on published action plan documents (see list above) and FIBL Statistics for % UAA and % market shares

Table 3.3d: Summary of key data and quantitative goals comparing current/planned and previous organic action plans in PT, RO, SE, SI, SK, EU, CH and NO

Country	Current action plan period	Previous action plan period	Earlier action plans (n)	Start of first action plan	Current production target (by year)	Previous production target (by year)	% UAA actual (2021)	Current market target (by year)	Previous market target (by year)	% market share (2021)	Other major targets
PT	2017-2027	No plan	0	2017	12% UAA by 2027	-	7.8	-	-	-	2027: 50% more consumption
RO	2023-2030	No plan	0	2023	6% of UAA by 2030	-	4.3	-	-	0.2	
SE	2018-2030	2011-2013 (Eko. Forum)	3	1996	30% of UAA by 2030	20% of UAA by 2013	20.2	-	6% of market by 2013	8.9	2030: 60% of public procurement 2013: 25% of public procurement
SI	2023-2027	2005-2015	0	2005	18% of UAA by 2027	20% of UAA, by 2015	10.8	Increase	10% of market by 2015	1.8	2015: 20% of farms 2027: 10% of farms
SK	2023-2027	No recent plan	2	1995	14% of UAA by 2027	-	11.7	-	-	-	
EU	2021-2030	2014-2020	1	2004	25% of UAA by 2030	-	9.6	-	-	-	2030: 30% of EU research funding on relevant topics
CH	No plan	No plan	-	-	-	-	17.4	-	-	10.9	Cantonal plans only
CH-AG	No plan	2019-2021	-	-	-	-	-	-	-	-	
NO	2018-2030	Not analysed	-	-	-	-	4.6	-	-	1.7	

Source: own compilation based on published action plan documents (see list above) and FIBL Statistics for % UAA and % market shares

Table 3.4a: Comparison of organic action plan measures between current/planned (C/Cp) and previous (P) plans in AT, BE, BG, CY, CZ and DE

Country	Action plan	Period (20xx-yy)	Targets		Production		Markets						Information				
			% land area	% market share	1. Area support	2. Invest-ment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations	9. Consu-mer infor-mation	10. Advice, demonstration	11. Training, education	12. Research, innovation	13. Statistics, market data
AT	C	23-30	35	-	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	15-22	20	-	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	+	0	0	+	+	+	+	+	+	+	0	+	0	0	+
BE	C	No plan															
	P	No plan															
BE-VLA	C	23-27	5	5	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	18-22	>1	-	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	+	+	+	0	+	+	0	+		0	+	+	0	+	+
BE-WAL	C	21-30	30	15	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	13-20	14	3	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	+	+	+	+	0	0	+	+		+	+	+	+	0	+
BG	C	23-30	-	-	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	07-13	8	3	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	+ new*	-	-	+	0	+	-	-	-	-	0	0	-	0	0	0
CY	C	23-30	7.5	-	a	b	c	d	e	F	g	h	i	j	k	l	m
	P	No plan	-	-													
	Δ	++ first	++		+	+	+	+	+	+		+	+	+	+	+	+
CZ	C	21-27	22	4	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	16-20	15	3	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	+	+	0	0	0	+	0		0	-	0	0	0	0	0
DE	C	23-30	30	-	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	17-22	20	-	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	++		0	+	+	+	+	+		0	0	0	0	+	+

C current; Cp planned; P previous; Δ change C/P; - large decrease; - small decrease; 0 no change/continuity; + small increase; ++ large increase; not applicable; a-z: notes in Annexes 10.3, 10.4; * after gap

Table 3.4b: Comparison of organic action plan measures between current/planned (C/Cp) and previous (P) plans in DK, EE, ES, FI, FR, GR, HR, and HU

Country	Action plan	Period (20xx-yy)	Targets		Production		Markets					Information					
			% land area	% market share	1. Area support	2. Investment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, innovation	13. Statistics, market data
DK	Cp	23/4-30	Not yet published, expected December 2023														
	P	18-21	>9	>11	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0															
EE	C	23-30	>25	-	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	14-20	18	-	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	+		-	-	-	+	0	+	+						
ES	Cp	24-30	Not yet published, expected 2024														
	P	14-16	Plan not located														
-AND	P	16-20	-	-	n	o	p	q	r	s	t	u	v	w	x	y	z
FI	C	22-30	25	5	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	13-20	20	>3	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	+	+	0	-	+	0	+	++	+	+	+	+	+	+	0
FR	Cp	24-30	Not yet published, expected 2024														
	P	18-22	15	-	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0															
GR	C	No plan															
	P	No plan															
HR	C	23-27	12		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	11-16	8		n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	+ new*	+		+	+	++	++	0	-	+	-	+	+	++	+	
HU	C	22-27	10	5	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	14-21	-	-	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	+	++	+	+	0	++	+	-	0	0	0	0	-	+	+

C current; Cp planned; P previous; Δ change C/P; - large decrease; - small decrease; 0 no change/continuity; + small increase; ++ large increase; not applicable; a-z: notes in Annexes 10.3, 10.4; * after gap

Table 3.4c: Comparison of organic action plan measures between current/planned (C/Cp) and previous (P) plans in IE, IT, LT, LU, LV, MT, NL and PL

Country	Action plan	Period (20xx-yy)	Targets		Production		Markets					Information					
			% land area	% market share	1. Area support	2. Investment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, innovation	13. Statistics, market data
IE	C	19-25	10		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	13-15	+		n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	+ new*	++		+	0	0	0	+	-	0	0	+	+	0	+	+
IT	C	23-25	25		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	16-20	16	4.5	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	+ new*	++	-	+	0	0	0	0	-	+	0	0	0	0	+	+
LT	C	No plan															
	P	No plan															
LU	C	19-25	20		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	16-18			n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	++		+	+	+	+	+	+	+	+	+	+	+	+	+
LV	Cp	23-30	25		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	Pre 2010															
	Δ	+ new*	++		+	+	+	+		+		+	+	+	+	+	+
MT	C	23-30	5		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	No plan															
	Δ	++ first	++		+	+	+		+			+	+	+	+	+	+
NL	C	23-30	15	+	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	Pre 2010															
	Δ	+ new*	++	+	++	+	+	+	+	+		+	+	+	+	+	+
PL	C	21-27	19		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	14-20			n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	++		0	0	+	0				0	0	0	0	0	+

C current; Cp planned; P previous; Δ change C/P; - large decrease; - small decrease; 0 no change/continuity; + small increase; ++ large increase; not applicable; a-z: notes in Annexes 10.3, 10.4; * after gap

Table 3.4d: Comparison of organic action plan measures between current/planned (C/Cp) and previous (P) plans in PT, RO, SE, SI, SK, EU, CH and NO

Country	Action plan	Period (20xx-yy)	Targets		Production		Markets					Information					
			% land area	% market share	1. Area support	2. Investment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, innovation	13. Statistics, market data
PT	C	17-27	12		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	No plan															
	Δ	++ first	++		+	+	+	+	+			+	+		+	+	+
RO	C	23-30	6		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	No plan															
	Δ	++ first	+		0	+	+	+	+	+	+	+	+	+	+	+	+
SE	C	18-30	30		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	11-13	20	6	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	+ new*	+	-	+	+	0	0	+	+		+	+	+	0	+	+
SI	C	23-27	18		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	05-15	20	10	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	+ new*	-	-	++	+	+	+	+	-	+	+	0	0	+	+	+
SK	C	23-27	14		a	b	c	d	e	f	g	h	i	j	k	l	m
	P	Pre 2010															
	Δ	+ new*	++		+	+	+	+	+		+	++	+	+	+	+	+
EU	C	21-30	25	-	a	b	c	d	e	f	g	h	i	j	k	l	m
	P	14-20	-	-	n	o	p	q	r	s	t	u	v	w	x	y	z
	Δ	0	++		+	+	+	+	+	-	0	+	+	+	+	+	+
CH	C	No plan															
	P	No plan															
-AG	P	19-21			n	o	p	q	r	s	t	u	v	w	x	y	z
NO	C	18-30			a	b	c	d	e	f	g	h	i	j	k	l	m

C current; Cp planned; P previous; Δ change C/P; - large decrease; - small decrease; 0 no change/continuity; + small increase; ++ large increase; not applicable; a-z: notes in Annexes 10.3, 10.4; * after gap

Source: own compilation based on published action plan documents (see list above)



Deliverable D1.2
Assessment of agricultural and aquaculture policy responses to the organic F2F targets

3.4. Conclusions

The development of organic action plans by almost every MS as we have documents, and by many regional authorities that we have not been able to analyse is a remarkable achievement and testament to the work of the EU Commission with Member States.

OAPs are an important means to complement the area-based conversion and maintenance support payments, with their production and public good focus. The key principles for good practice in relation to such plans are well established, in part thanks to an EU-funded project on organic action plans in the mid 2000s¹⁸. Key elements include:

- a status-quo and SWOT-analysis to identify action needs, priorities and targets
- well-defined actions including scope, schedule, resources and ownership
- effective monitoring and evaluation, both during and after the plan
- stakeholder engagement in planning, implementation and evaluation
- a financial framework including resources for the co-ordination of plan delivery

While most of the national OAPs included some, and sometimes all, of these elements, there is scope for further improvement, in particular to ensure better definition of actions to be undertaken and to allocate responsibilities for delivery to relevant organisations. These organisations can also be private sector companies and NGOs – action plans can provide good opportunities for public-private partnerships.

The scale of the challenge to reach the ambitious organic targets set by the EU and MS is such that more is needed than just saying ‘more training courses’ or ‘more advice’ or ‘more market development’. Serious consideration needs to be given to institutional capacity building, whether in terms of supporting the development of organic organisations, establishing specialist centres of excellence (competence centres), or promoting institutional change within mainstream institutions to make organic provision more central and less peripheral, with a strong focus on meeting the needs of the sector.

Last, but not least, to make sure that the action plans are not just a paper exercise, there needs to be an explicit commitment of resources – people and funding – to make sure that the co-ordination is effective and the implementation can be pushed forward. While it is tempting to think that mainstream organisations can take this on, it is necessary to ensure that a suitable unit, or a dedicated organisation, exists that can be fully focused on the process.

¹⁸ <https://www.orgap.org/>, accessed 24.01.24; see also Schmid *et al.* (2008); Meredith *et al.* (2018)



Deliverable D1.2
Assessment of agricultural and aquaculture policy responses to the organic F2F targets

Part B: Organic aquaculture and EU Fishery Policies

GIUSEPPE LEMBO



Deliverable D1.2

Assessment of agricultural and aquaculture policy responses to the organic F2F targets

4. State of current organic aquaculture production

The aquaculture sector in Europe is still far from reaching its full potential in terms of growth and meeting the increasing demand for more sustainable seafood. The EU imports over 80% of the seafood that it consumes. Aquaculture products overall (including imports) represent 30% of EU consumption of seafood, while EU aquaculture products represent only 10% of EU consumption (EUMOFA, 2022a).

Aquaculture in the EU, when compared to aquaculture in other non-EU countries, is subject to some of the strictest regulatory requirements for quality, health and the environment¹⁹. But even so, EU aquaculture can still further improve its environmental performance, and thereby contribute to the objectives of the European Green Deal (EC, 2019) and related strategies.

Aquaculture is one of the fastest growing food producing sectors in the world and is an increasingly important contributor to global food supply and economic growth. The share of global supply of fish products for human consumption from aquaculture increased from 16% in 1990 to 57% in 2020, including aquatic plants. The total estimated global production from captured fisheries and aquaculture increased from 199 million tonnes (Mt) in 2016 to 214 Mt in 2020 (FAO, 2022). The production from world capture fisheries has been fluctuating around 90 Mt per year during the last two decades. In contrast, the global aquaculture production has been steadily increasing about 2-3% per year, as shown in Figure 4.1. However, this growth has primarily been driven by Asian countries producing 92% of the world aquaculture products. China is the most important producer of aquaculture products in the world, producing 57% of the global aquaculture products. European Union aquaculture production represents only 1.0% of world aquaculture production (FAO, 2022).

¹⁹ Strategic guidelines for a more sustainable and competitive EU aquaculture for the period 2021 to 2030. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:236:FIN>, accessed 24.01.24

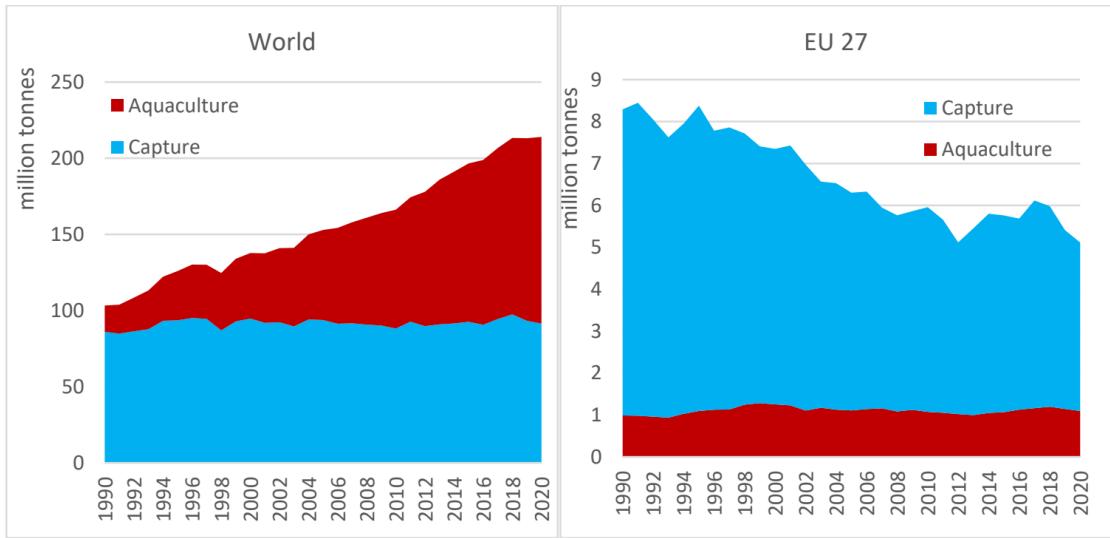


Figure 4.1: World and EU27 capture and aquaculture production trend (including algae)

Source: FAO, 2022

Fed aquaculture production in Europe is progressively outpacing that of non-fed species. The share of non-fed aquaculture in total farmed aquatic animal production declined from over 40% before 2000 to less than 20% in 2020, although absolute production stayed relatively stable (Figure 4.2).

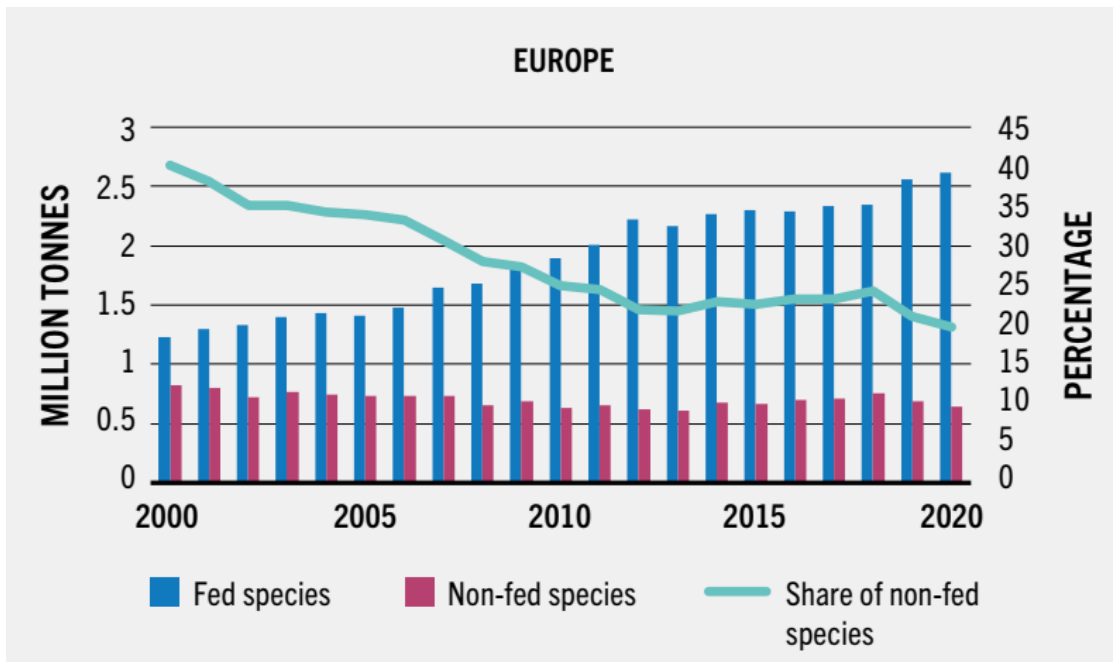


Figure 4.2: Feed and non-feed aquaculture production in Europe

Source: FAO, 2022



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Assessment of agricultural and aquaculture policy responses to the organic F2F targets

Based on EU and national sources, the total organic aquaculture production in the EU27 is estimated by EUMOFA at 73,570 tonnes in 2020 accounting for 6.7% of the total EU aquaculture production (Table 4.1). As a comparison, the EU organic aquaculture production in 2015 was estimated at 46,341 tonnes at EU27 level (49,723 t at EU28 level), accounting for 4% of the EU aquaculture sector (EUMOFA, 2022b).

The main producing country is Ireland with 18,050 t organic aquaculture production, accounting for almost half of the total national aquaculture production. Organic aquaculture production in Italy, France, Netherlands, Spain, Germany and Denmark ranges from 5,000 to 10,000 t and Bulgaria, Hungary and Greece from 1,000 to 3,000 t. The other countries account for a production of less than 1,000 t. The ranking of production in the EU27 by species is (see also Table 4.2):

1. Mussels, with 41,936 t certified organic in 2020 (10% of the EU mussel production), mainly produced in the Netherlands, Italy, Germany, Denmark, France and Spain;
2. Salmon, with 12,870 t certified organic, mainly produced in Ireland;
3. Trout, with 4,590 t certified organic. France accounts for half of the production (with 2,346 t), followed by Spain (917 t) and Denmark (642 t). The share of organic trout production in the EU is 2%.
4. Carp, with 3,562 t (4% of the EU production), mainly produced in Hungary, Romania and Lithuania.
5. Oysters accounts for 3% of the EU production (3,228 t of organic oyster), almost exclusively located in France.
6. Other species are European seabass/gilthead seabream, with 2,750 t (1.5% of EU production). The main producing country is Greece with 57% of the EU production.

In 2020, the total production of organic aquaculture in the EU was 73,570 t, a 60% increase compared to 2015 (Table 4.2). In 2020, the main species by far was mussels, accounting for 57% of the total volume followed by salmon (17%). Compared to 2015, bivalves and especially mussels became dominant in the organic production and most finfish species have either stayed stable (salmon, trout) or decreased (carp) except for European seabass/gilthead seabream.

Among close neighbours outside the EU, organic aquaculture production in the United Kingdom is primarily directed towards salmon, where Scottish farmed salmon represents most of the volume produced. In 2020 the total production of organic salmon was 13,128 t, with a significant increase compared to 2,982 t in 2015. In Norway too, organic aquaculture production is mainly directed towards salmon. In 2020 the total production of organic salmon was 25,546 t, with an increase compared to the 2015 production that was 16,000 t (EUMOFA, 2022b).



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Table 4.1: EU27 organic aquaculture production (t) and share of total

Member State	Organic aquaculture production 2020 ^a (t)	Total aquaculture production 2020 (t)	Organic share of total production (%)
IE	18,050	37,709	47.9
IT	9,608	122,778	7.8
FR	8,955	191,000	4.7
NL	7,978	39,940	20.0
ES	7,476	276,562	2.7
DE	6,746	32,258	20.9
DK	5,487	42,607	12.9
BG	3,004	15,047	20.0
HU	1,743	18,373	9.5
GR	1,574	131,645	1.2
RO	808	12,200	6.6
SI	713	1,673	42.6
LT	614	4,477	13.7
PL	282	47,700	0.6
HR	280	21,718	1.3
AT	233	4,527	5.2
BE	11	209	5.3
LV	8	717	1.1
CZ	0	20,401	0.0
PT	0	14,552	0.0
FI	0	15,053	0.0
MT	0	19,829	0.0
SE	0	12,090	0.0
CY	0	7,343	0.0
SK	0	2,296	0.0
EE	0	1,090	0.0
LU	0	0	0.0
EU27	73,570	1,093,794	6.7

a or last year available

Sources: EUMOFA, 2022b



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Table 4.2: EU27 organic aquaculture production by species (t) and share of the total aquaculture production

Species	Total production (2020)	Organic production (2020)	Organic share of total (%)	Organic change from 2015	Main countries
Mussels	409,622	41,936	10%	110%	NL, IT, DE; DK, FR, ES
Salmon	17,095	12,870	75%	-1%	IE
Trout	187,936	4,590	2%	-8%	FR, ES, DK
Carp	85,198	3,562	4%	-49%	HU, RO, LT
Oyster	97,544	3,228	3%	na	FR
European seabass, gilthead seabream	174,501	2,750	2%	38%	GR
Other species	121,900	4,634	4%	na	
Total	1,093,796	73,570	7%	60%	

Source: EUMOFA, 2022b



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5. Common Fisheries Policy (CFP)

The goal of the Common Fisheries Policy (CFP)²⁰ is to ensure long-term sustainability for fisheries and aquaculture, the availability of food supplies and a fair standard of living for fisheries and aquaculture communities. This includes everyone involved in the entire value chain, in order to preserve the socio-economic fabric of coastal communities.

By combining environmental, social and economic sustainability objectives, the CFP was a precursor of the European Green Deal and its related strategies. In turn, the European Green Deal strengthened the CFP approach, emphasising the triple contribution of fisheries and aquaculture to the economy and employment of coastal regions, food security in the EU and the protection of the marine environment.

This requires an integrated approach that is coherent with other policy domains, such as environmental, agricultural and energy policies. Indeed, the Farm to Fork strategy (EC, 2020b) recognises the strong link between healthy people, healthy societies and a healthy planet and the need to ensure the livelihood of primary producers to successfully transition to a sustainable EU food system.

The CFP provides tools that can help to improve the attractiveness of the fishing and aquaculture as a profession. In addition, the EU budget, particularly the European Maritime Fisheries and Aquaculture Fund (EMFAF)²¹ and its community-led local development (CLLD)²², provides significant financial support for the improvement of safety and working conditions, development of skills, sharing of knowledge and making the sector more resilient overall.

For aquaculture, the 2013 CFP reform introduced new tools for promoting sustainable aquaculture. Coupled with EU funding, this has allowed for progress in terms of sustainability and competitiveness of this important sector. In 2021, the Commission adopted the new Strategic Guidelines for a more sustainable and competitive EU aquaculture for the period 2020-2030 (EC, 2021b)²³, and Member States updated their national strategic aquaculture plans accordingly.

²⁰ Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy, amending Council Regulations (EC) No 1954/2003 and (EC) No 1224/2009 and repealing Council Regulations (EC) No 2371/2002 and (EC) No 639/2004 and Council Decision 2004/585/EC. <http://data.europa.eu/eli/reg/2013/1380/oj>, accessed 24.01.24

²¹ Regulation (EU) 2021/1139 of the European Parliament and of the Council of 7 July 2021 establishing the European Maritime, Fisheries and Aquaculture Fund and amending Regulation (EU) 2017/1004

²² <https://ec.europa.eu/european-social-fund-plus/en/publications/esf-and-community-led-local-development-lessons-future>, accessed 20.09.23

²³ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Strategic Guidelines for a more sustainable and competitive EU aquaculture for the period 2020-2030 (COM/2021/0236 final)





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In the framework of the CFP, the Commission will issue by 2024 four guidance documents as part of the implementation of the Commission communication on the Strategic Guidelines for a more sustainable and competitive EU aquaculture. They will support the sector advancing in the following areas: i) good administrative and regulatory practices, ii) access to space, iv) environmental performance, and iv) climate mitigation, which all have the potential to influence organic aquaculture.

EU legislation (Reg (EU) 2018/848²⁴) and policies for organic production also apply to aquaculture. These rules promote, through certification and labelling, aquaculture that complies with stricter production requirements on environmental impact and animal welfare, as well as limited and regulated use of inputs. The main responsibility of the application of this legislation and the management of aquaculture activities lies with public authorities in the different EU countries, the aim being to allow EU countries to support their producers while respecting EU competition rules and other policies, specific state aid rules apply to the aquaculture sectors.

5.1. EU Strategic Guidelines for the sustainable development of EU aquaculture (2021-2030)

5.1.1. Background

The European Green Deal and the Farm to Fork Strategy underline the potential of farmed seafood as a source of protein for food and feed with a low-carbon footprint, which has an important role to play in helping to build a sustainable food system. The Farm to Fork Strategy also sets targets for aquaculture, in particular the reduction of sales of antimicrobials and a significant increase in organic aquaculture. Indeed, according to the Farm to Fork Strategy, the Commission will “*take action to reduce overall EU sales of antimicrobials for farmed animals and in aquaculture by 50% by 2030*” and has set the objective of having “*at least 25% of the EU’s agricultural land under organic farming by 2030 and a significant increase in organic aquaculture*”.

The European Green Deal objective is to stimulate the economy and create jobs, while accelerating the green transition in particular with respect to climate change. In this context, it is important that aquaculture in the EU grows in a way that also contributes to important objectives, such as reducing carbon emissions, transitioning to more sustainable food systems, reversing the loss of biodiversity, reducing pollution and creating jobs in coastal and rural communities.

²⁴ REGULATION (EU) 2018/848 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32018R0848>, accessed 24.01.24



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Concerning aquaculture, the EU Action Plan for the development of organic production (EC, 2021a) refers to the new Strategic Guidelines for the sustainable development of EU aquaculture (EC, 2021b), adopted by the Commission in spring 2021, which promote organic aquaculture. In addition, the Commission encourages EU Member States to include the increase of organic aquaculture among the objectives of their reviewed Multi-annual National Strategic Plans for aquaculture. Furthermore, the Commission stipulates that the EMFAF (European Maritime, Fisheries and Aquaculture Fund) should be used to promote sustainable aquaculture practices such as organic production.

Action 17 of the EU Organic Action Plan states that the Commission intends to support:

- research and innovation on alternative sources of nutrients, breeding and animal welfare in aquaculture;
- the promotion of investments in adapted polyculture and multi-trophic aquaculture systems;
- the promotion of hatcheries and nurseries activities for organic juveniles; and to
- identify and address as appropriate any specific obstacles to the growth of EU organic aquaculture.

As a result, some Member States have also included aquaculture in their national Organic Action Plans.

The Strategic Guidelines cover all issues that are relevant for the sustainable development of aquaculture in the EU and provide concrete recommendations to the Commission, Member States, aquaculture producers and other relevant actors, such as NGOs. The recommendations include the development of guidance and good practices on different aspects of aquaculture activities.

5.1.2. The Strategic Guidelines

The strategic guidelines for the sustainable development of EU aquaculture (EC, 2021b) aim to offer a common vision, for EU Member States and all relevant stakeholders for the further development of aquaculture in the EU in a way that contributes to that growth strategy. In particular, these guidelines aim to help build an EU aquaculture sector that:

1. is competitive and resilient;
2. ensures the supply of nutritious and healthy food;
3. reduces the EU's dependency on seafood imports;
4. creates economic opportunities and jobs;
5. becomes a global reference for sustainability.

Achieving this vision will require several common challenges and opportunities across both the EU's conventional and organic aquaculture sectors to be addressed, in order to reach the following inter-related objectives.



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1. Building resilience and competitiveness

The Strategic Guidelines suggest that Member States should pay special attention to the development of aquaculture with a lower environmental impact (e.g., reduced emissions of nutrients and organic matter into the environment) and the integration of suitable aquaculture activities into protected areas such as Natura2000 areas. In addition, spatial planning should ensure the availability of special areas for organic aquaculture.

The complexity of national licensing systems represents another important obstacle to overcome by a) streamlining and harmonising legislation and administrative guidance on aquaculture; b) setting up a “one-stop-shop” system for aquaculture licences; c) designating areas suitable for aquaculture; d) providing for longer-term licensing, with regular monitoring and sanctions for non-compliance (EC, 2021b).

Finally, research gaps should be addressed to minimize the impact of husbandry practices on fish health and welfare, as well as to prevent disease and parasite, reducing veterinary medicines, antimicrobials and anti-parasitic substances. To this purpose, further research to make new specific vaccines available for use in aquatic animals must be promoted.

2. Participating in the green transition

The EU aquaculture sector can contribute to the transition to sustainable food systems by developing the circular economy, reversing biodiversity loss, reducing pollution, and moving further towards the "competitive sustainability", as expressed in the Farm to Fork Strategy.

According to the Strategic Guidelines (EC, 2021b), the environmental performance of the EU aquaculture sector can be further improved by:

- Using life-cycle approaches in the assessment of the environmental impact of the EU aquaculture sector.
- Ensuring sustainable feed systems (e.g., limiting feed producers' reliance on fish meal and fish oil taken from wild stocks and using alternative protein ingredients such as algae, or insects, or the waste from other industries).
- Developing solutions to reduce the use of veterinary products and other substances (e.g., anti-fouling agents).
- Ensuring environmental monitoring of aquaculture sites, including water quality, discharges and emissions (e.g., organic matter, nutrients, plastics, veterinary medicines, other pollutants, or any form of waste and litter).
- Setting up management practices, including a risk strategy for mitigating impacts (e.g., discharges and emissions), the management of predators, and the prevention of escapees.
- Promoting the use of renewable energy sources and greater energy efficiency.
- Applying a circular-economy approach, including the use of waste.



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- Promoting the development of organic aquaculture and other aquaculture systems with lower environmental impact, such as integrated multi-trophic aquaculture systems.
- Promoting and providing value to forms of aquaculture that offer ecosystem services, including in ponds, wetlands and brackish waters.
- Supporting both maintenance and improvement of aquatic genetic resources and the use of selective breeding for aquaculture stocks.

More attention should be paid to the welfare of fish, and not only because of the increasing public interest in – and demand for – high-welfare fish products. Keeping fish under good welfare conditions also has economic benefits for the industry, through reduced costs and better-quality products. Further action to improve fish welfare is necessary (EC, 2021b), focusing on:

- Developing good practices on fish welfare during farming, transport and killing.
- Setting common, validated, species-specific, and auditable fish-welfare indicators throughout the production chain (including transport and slaughtering).
- Further research and innovation, in particular on species-specific welfare parameters, including nutritional needs in different rearing systems.
- Providing knowledge and skills on fish welfare to aquaculture producers and other operators that handle live farmed fish.

3. Ensuring social acceptance and information to the consumer

Social acceptance and recognition of the benefits and value of aquaculture products is considered at the same time a challenge and an opportunity for the growth of EU aquaculture and its competitiveness. It is critically important to ensure more accurate information and transparency about how aquaculture activities are carried out. Making consumers more aware of the efforts made by aquaculture farmers is important to allow the sector to reap the benefits of high sustainability and quality standards. This will help to make EU aquaculture products more competitive and also ensure a level playing field with other non-EU aquaculture products that may not offer equivalent sustainability and quality (EC, 2021b).

In addition, the collection of accurate data is necessary to ensure the appropriate planning of aquaculture activities, and to assess and monitor the social, economic and environmental performance of the EU's aquaculture sector. Transparency, better reporting obligations and streamline reporting procedures are key factors for maintaining the trust of the consumer and other stakeholders in the sector.

4. Increasing knowledge and innovation

Knowledge and innovation (including the use of digital technology) are key factors to achieve the objectives set for the EU aquaculture sector. They are especially important for building the resilience and competitiveness of aquaculture and ensuring its green



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transition. Horizon Europe, the EU framework programme for research and innovation, offers an important opportunity to make a step forward in this area.

5.1.3. Conclusions

The Strategic Guidelines set the path for EU aquaculture to become a reference as a sector that is resilient, competitive and a global standard in sustainability and quality. To achieve this objective, it is necessary to have the support of all relevant actors (including EU Member States, the EU aquaculture industry, and other stakeholders such as NGOs). The Commission invites EU Member States to ensure the appropriate means to implement these guidelines and actions. In particular, the Commission invites EU Member States to take into consideration the priorities set out in these guidelines for allocating support to the sector under EU and national funds.

Most of the priorities put forward by the guidelines make reference to typical keywords of the organic principles (and in turn the EU organic regulation) but, in addition to this, the guidelines explicitly support:

- The Farm to Fork Strategy targets for aquaculture, in particular the reduction of sales of antimicrobials and a significant increase in organic aquaculture.
- The regulatory framework for EU aquaculture and the specific legislation for organic production, which promotes, through certification and labelling, aquaculture that complies with stricter production requirements on environmental impact and animal welfare, as well as limited and regulated use of external inputs.
- The implementation of spatial planning that should always ensure to make available special areas for organic aquaculture and the production of molluscs.
- The promotion of organic aquaculture and other aquaculture systems with lower environmental impact, such as: energy-efficient recirculating aquaculture systems, integrated multi-trophic aquaculture systems (IMTA), as well as the diversification to lower-trophic species (molluscs and other invertebrates and algae and herbivore fish).
- The EU legislation on animal welfare and the EU Regulation on Organic Production which sets out more specific requirements, such as maximum stocking-density levels, restrictions on the use of artificial light and oxygen, etc.

The Commission will undertake, not later than four years after the publication of this guidelines, an assessment of: (i) the progress made in developing the recommended actions in the annex; and (ii) the efficiency of these actions in helping achieve the objectives laid down in these new strategic guidelines, with the possibility of adapting actions accordingly (EC, 2021b). By 2029, an evaluation of the new Strategic Guidelines will be carried out, which will assess their efficiency, effectiveness, coherence, relevance and EU added value, to provide the evidence base and support the decision on the next steps after 2030.



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5.2. European Funds for Fisheries and Aquaculture

5.2.1. European Maritime and Fisheries Fund (2014-2020)

The European Maritime Fisheries Fund (EMFF)²⁵ was the financial instrument to deliver the objectives of the reformed Common Fisheries Policy (CFP) in 2014-2020. The EMFF focused on the long-term objectives of the Europe 2020 strategy for a smart, sustainable and inclusive growth over the 2014-2020 period. It aimed to contribute to sustainable and competitive fisheries and aquaculture and to a balanced and inclusive territorial development of fisheries and aquaculture areas. The fund mandate was to: i) help fishers adapt to sustainable fishing; ii) support coastal communities in diversifying their economies; iii) finance projects that create new jobs and improve quality of life along European coasts; iv) support sustainable aquaculture developments; v) make it easier for applicants to access financing; vi) support the implementation of the maritime policy. The planned budget was €7.791 billion for the period 2014-2020.

11% of the fund was managed by the European Commission to support EU-wide objectives in maritime and coastal affairs, while 89% was managed by the Member States by means of operational programmes. Each country was allocated a share of the total fund budget, based on the size of its fishing industry (Figure 5.1). Each country prepared an operational programme, setting out how the funds will be used during the funding period 2014-20. Once the Commission approved the programme, it was up to the national authorities to decide which projects would be funded. The national authorities and the Commission were jointly responsible for the implementation of the programme.

Figure 5.2 shows the investment progress (share of original budget) according to three variables:

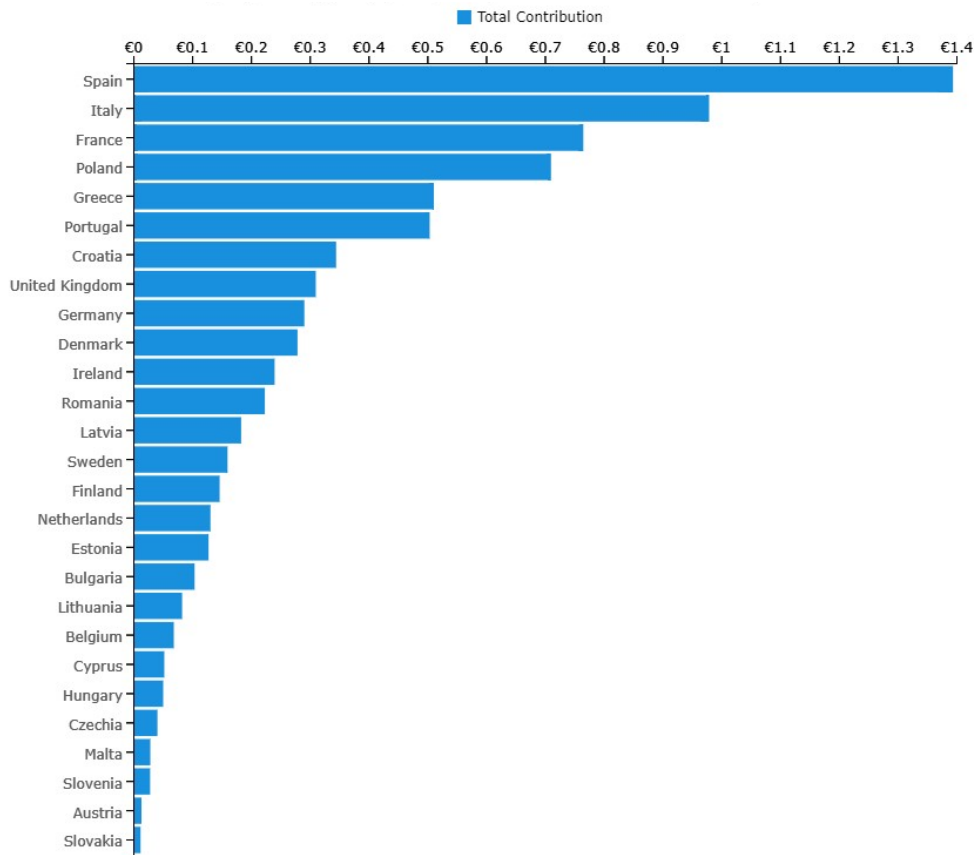
- **Planned:** Total budget of the fund. It represents the total planned investment volume including EU and national financing. The total can change over time within the rules on 'reprogramming'.
- **Decided:** The total financial resources allocated to decided (selected) projects (the value of the project pipeline decided at a specific date).
- **Spent:** The total investment expenditure reported to the programme managers by the selected/decided projects.

Figure 5.3 shows, by country, the total budget planned, decided and spent up to the end of 2022.

²⁵ https://oceans-and-fisheries.ec.europa.eu/funding/european-maritime-and-fisheries-fund-emff_en, accessed 22.01.24



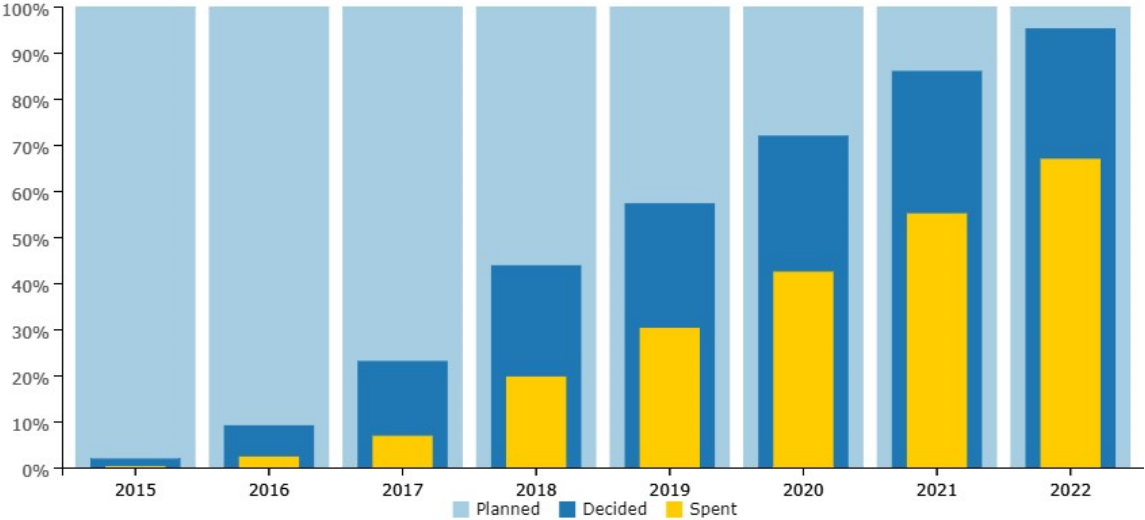
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Refresh Date: 08/06/2023

Figure 5.1: European Maritime and Fisheries Fund 2014-2020, total budget (EU contribution) by country, billion €

Source: Cohesion Open Data Platform of the European Commission

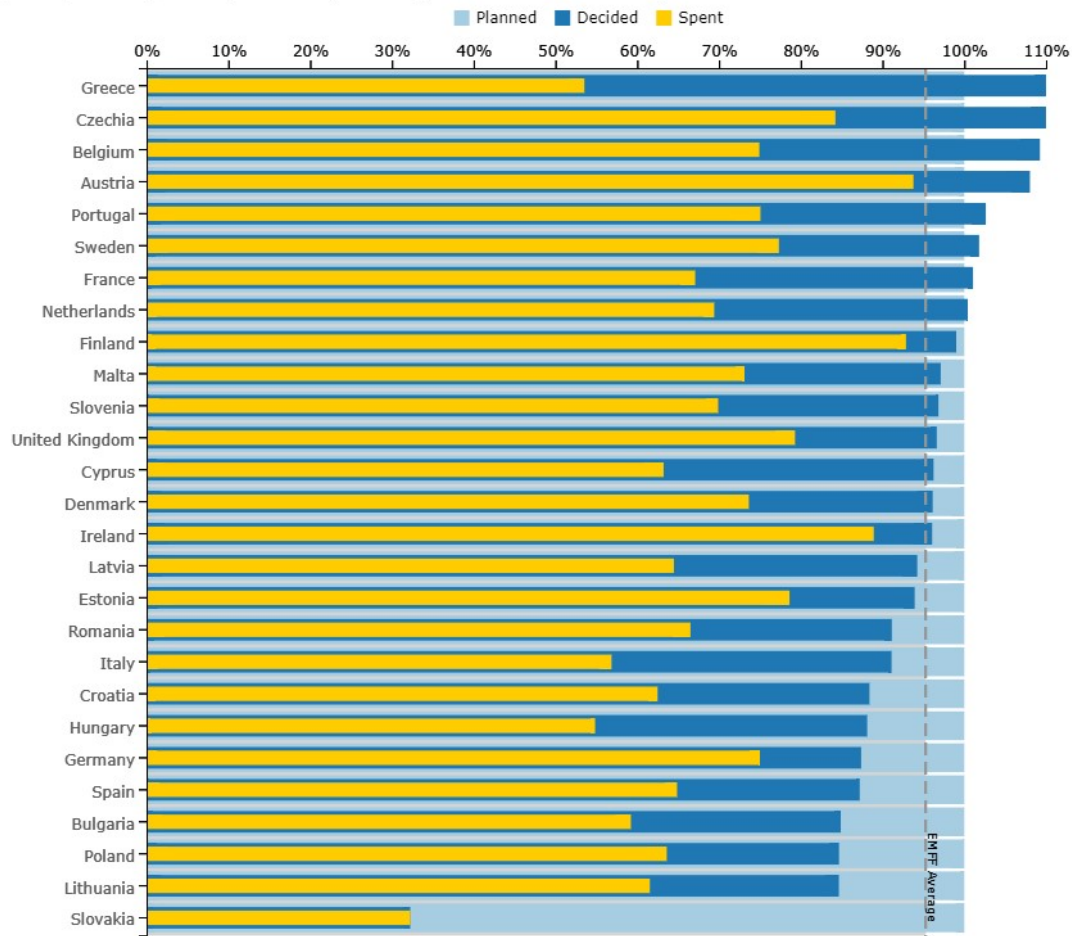


Period Covered: up to 31/12/2022

Refresh Date: 08/06/2023

Figure 5.2: Implementation Progress for European Maritime and Fisheries Fund

Source: Cohesion Open Data Platform of the European Commission



Period Covered: up to 31/12/2022

Refresh Date: 08/06/2023

Figure 5.3: Implementation by country for European Maritime and Fisheries Fund - total cost of selection and spending as % of planned

Source: Cohesion Open Data Platform of the European Commission

The budgets and potential for inclusion of organic aquaculture in selected countries are outlined below:

Austria: The operational programme supports the development of organic aquaculture. Furthermore, measures to inform consumers about local/regional, organic/ecological aquaculture or sustainability in local/regional aquaculture and inland fisheries are planned as accompanying measures to increase production. Resources available to “Promote environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based aquaculture” are €4,103,898 (EMFF contribution) and €4,926,598 (national contribution).

Croatia: The operational programme supports the development of organic aquaculture. Resources available for “Achieving a sustainable, resource-efficient, innovative, competitive and knowledge-based aquaculture” are €55,507,476 (EMFF contribution) and €18,502,494 (national contribution).



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Denmark: The operational programme supports the development of organic aquaculture with the specific objective b) “Improving the competitiveness and viability of the aquaculture sector, including better safety and labour conditions, in particular for SMEs”. There is a potential for developing organic aquaculture, which is supported by subsidies for investments in production facilities. Organic aquaculture can also be promoted through other actions of the programme, such as support for innovation and market support activities through special prioritisation. Resources available for “*Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge-based aquaculture*” are €25,750,497 (EMFF contribution) and €8,583,500 (national contribution).

France: The operational programme supports the development of organic aquaculture with the specific objective 2.3 “Protection and restoration of aquatic biodiversity, the strengthening of ecosystems linked to aquaculture and the promotion of efficient aquaculture in the use of resources”. Resources available for “*Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge-based aquaculture*” are €88,789,702 (EMFF contribution) and €29,596,569 (national contribution).

Germany: The operational programme supports the development of organic aquaculture with the specific objective 3 “Protecting and restoring aquatic biodiversity, strengthening aquaculture-related ecosystems and Promotion resource-conserving”, and 4 “Promote aquaculture with a high level of environmental protection, animal health and welfare and public health and safety”. Resources available to “*Promote environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based aquaculture*” are €67,922,143 (EMFF contribution) and €22,640,715 (national contribution).

Greece: The operational programme supports the development of organic aquaculture through:

- Priority 2 - Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge-based aquaculture: Objective 3 – Protection and restoration of aquatic biodiversity and enhancement of ecosystems related to aquaculture and promotion of resource efficient aquaculture; Objective 4 - Promotion of aquaculture having a high level of environmental protection, and the promotion of animal health and welfare and of public health and safety. Actions serving the transition to ecological management and control systems and organic aquaculture methods.
- Priority 5 - Fostering marketing and processing: Objective 2 - Encouragement of investment in the processing and marketing sectors. Measures for the processing organic aquaculture products

Resources available for “Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge-based aquaculture” are €62,394,086 (EMFF contribution) and €20,798,029 (national contribution).



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Ireland: The operational programme supports the development of organic aquaculture through Priority 2 – Sustainable Aquaculture. Ireland is committed to sustainably growing its aquaculture sector and has set out in its National Strategic Plan for Sustainable Aquaculture Development the actions and initiatives that will be undertaken to further this objective. Sustainable growth of output, value and employment will be promoted through supports for sustainably increasing the productive output of aquaculture enterprises, supporting new aquaculture enterprises entering the sector, scaling up of aquaculture enterprises to improve their competitiveness and efficiency, diversification into new species, more farming of under-utilised species and promotion of organic aquaculture. Resources available for “*Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge-based aquaculture*” are €14,900,000 (EMFF contribution) and €14,900,000 (national contribution).

Italy: The operational programme supports the development of organic aquaculture through Objective 2 “Ensure the development and sustainable growth of aquaculture through coordinated spatial planning and increasing the potential of sites” and Objective 3 “Promote the competitiveness of aquaculture”. In order to encourage adaptation and mitigation to climate change, highly environmentally compatible forms of aquaculture will be promoted, improvements in the energy efficiency of plants, conversion to organic aquaculture and eco-management, the provision of environmental services and the responsible use of alien species. It is also necessary to facilitate access to certifications, to encourage the recognition and transformation of organic aquaculture products. Resources available for “*Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge-based aquaculture*” are €75,373,142 (EMFF contribution) and €75,373,142 (national contribution).

Spain: The operational programme supports the development of organic aquaculture through Priority 2 - Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge-based aquaculture. Spain is committed to sustainably growing its aquaculture sector as it is set out in its National Strategic Plan for Sustainable Aquaculture, where there is the provision to strengthen environmental aspects, supporting environmental audit systems (EMAS) and organic aquaculture, as well as processing of organic aquaculture products. Resources available for “*Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge-based aquaculture*” are €190,903,348 (EMFF contribution) and €63,634,456 (national contribution).

Table 5.1 shows the results of the common indicators used in the programme, under the relevant EMFF categories. The progress of the achieved results, by country, is reported as “Planned” and “fully Implemented projects”. Data are refreshed at March 2023. It is worth highlighting that each Member State can still spend the budget assigned until the end of the year, so the values in the table are not final.



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Table 5.1: Common indicators used in the EMFF by country, as planned and implemented

	Country	Austria	Croatia	Denmark	France	Germany	Greece	Ireland	Italy	Spain	Total	EU28
Aquaculture production (t)	Planned	5,000	14,365	15,500	21,150	5,035	30,150	135,000	148,427	35,000	409,627	579,332
	Implemented	894	22,456	16,464	59,747	2,159	10,418	21,854	76,859	84,025	294,876	444,764
Organic aquaculture (t)	Planned		800		300	215		6,500	459	379	8,653	10,709
	Implemented		418		981			200	227		1,826	6,515
Employment maintained in aquaculture (FTE)	Planned	574			800	636	50	750	8,178	382	11,370	15,179
	Implemented	555			73	1,174		302	2,035		4,139	5,627
Employment created in aquaculture (FTE)	Planned					107		1,350	394		1,851	2,673
	Implemented					34		125	578		737	1,069
Aquaculture production certified under voluntary sustainability schemes (t)	Planned				500	65			3,073		3,638	3,738
	Implemented				346				971		1,317	1,317
Aquaculture farms providing environmental services	Planned					201			40	9	250	1,197
	Implemented					106			23		129	1,327
Totals	Planned	5,574	15,165	15,500	22,750	6,259	30,200	143,600	160,571	35,770	435,389	612,828
	Implemented	1,449	22,874	16,464	61,147	3,473	10,418	22,481	80,693	84,025	303,024	460,619

FTE: Full-time Equivalent

Source: Cohesion Open Data Platform of the European Commission



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5.2.2. European Maritime, Fisheries and Aquaculture Fund (2021-2027)

The European Maritime, Fisheries and Aquaculture Fund (EMFAF)²⁶ runs from 2021 to 2027 and supports the EU Common Fisheries Policy (CFP), the EU maritime policy and the EU agenda for international ocean governance. It provides support for developing innovative projects ensuring that aquatic and maritime resources are used sustainably. As a global ocean actor and a major producer of seafood, the EU has a responsibility to protect and sustainably use the oceans and their resources. It is also in the EU's socio-economic interest to guarantee the availability of food supplies, the competitiveness of the maritime economy and the livelihood of coastal communities.

The fund helps achieve sustainable fisheries and conserve marine biological resources. This leads to i) food security through the supply of seafood products; ii) growth of a sustainable blue economy; iii) healthy, safe and sustainably managed seas and oceans. It also helps achieve the UN's Sustainable Development Goal 14²⁷ to which the EU is committed. Furthermore, the EMFAF helps fulfil the objectives of the European Green Deal²⁸, the roadmap for the EU climate and environmental policies.

The EMFAF supports innovative projects that contribute to the sustainable exploitation and management of aquatic and maritime resources. In particular, it facilitates:

- the transition to sustainable and low-carbon fishing;
- the protection of marine biodiversity and ecosystems;
- the supply of quality and healthy seafood to European consumers;
- the socio-economic attractiveness and the generational renewal of the fishing sector, in particular as regards small-scale coastal fisheries;
- the development of a sustainable and competitive aquaculture contributing to food security;
- the improvement of skills and working conditions in the fishing and aquaculture sectors;
- the economic and social vitality of coastal communities;
- innovation in the sustainable blue economy;
- maritime security towards a safe maritime space;
- international cooperation towards healthy, safe and sustainably managed oceans.

The EMFAF 2021-2027 total budget currently adopted is €7,800,367,132, where the EU contribution is €5,222,972,407 and the national contribution is €2,577,394,725.

²⁶ https://oceans-and-fisheries.ec.europa.eu/funding/emfaf_en, accessed 22.01.24

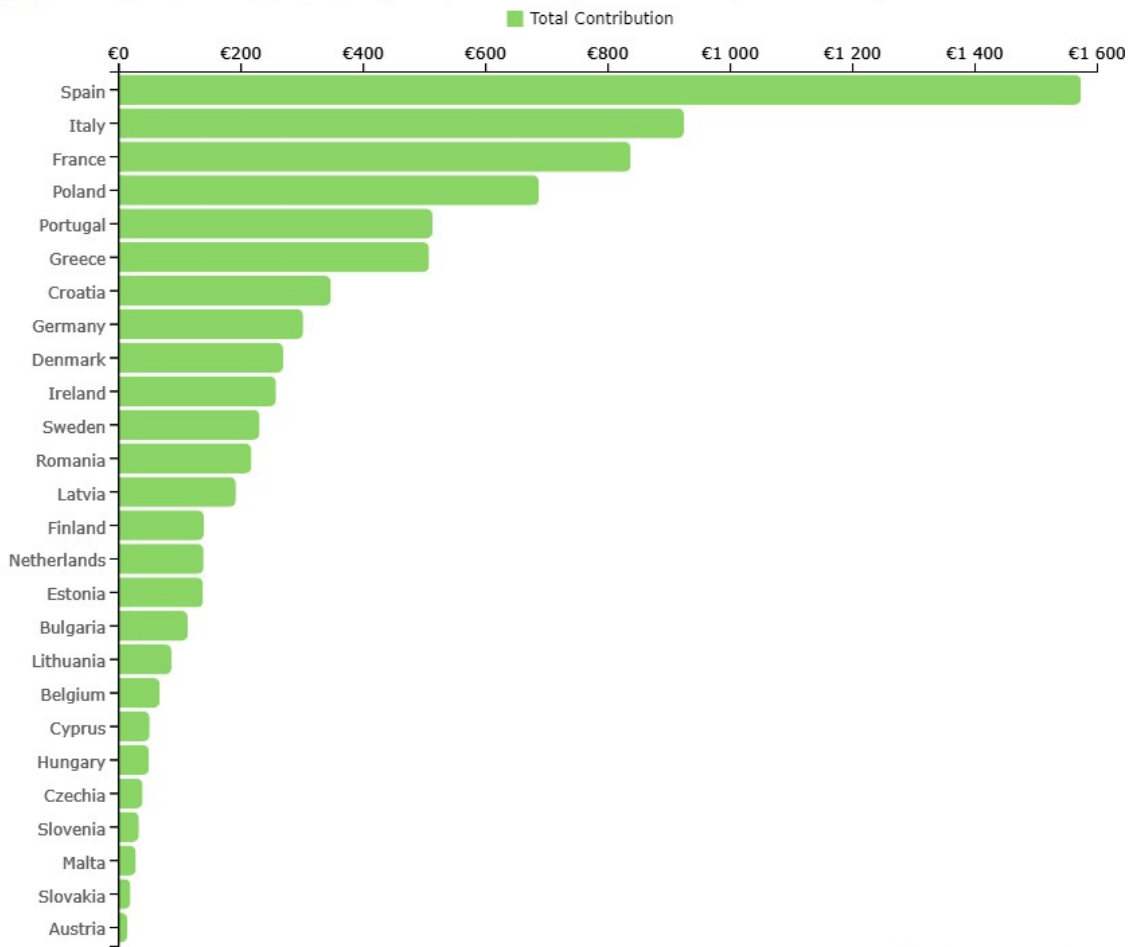
²⁷ Goal 14: Conserve and sustainably use the oceans, seas and marine resources.

<https://www.un.org/sustainabledevelopment/oceans/>, accessed 24.01.24

²⁸ https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en, accessed 24.01.24



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Refresh Date: 22/06/2023

Figure 5.4: European Maritime, Fisheries and Aquaculture Fund, total budget (EU contribution) by country, billion €

Source: Cohesion Open Data Platform of the European Commission

The budgets and potential for inclusion of organic aquaculture in selected countries are outlined below. In each case, the actual allocation to organic aquaculture will depend on uptake for organic projects.

Austria: The operational programme supports the development of organic aquaculture through Priority 2 *“Promoting sustainable aquaculture activities and the processing and marketing of fishery and aquaculture products”*. Specific objective 2a) *“Promote sustainable aquaculture activities, in particular strengthening the competitiveness of aquaculture production while ensuring the long-term environmental sustainability of the activities”*. Investments to reduce the negative impacts or increase the positive impacts of aquaculture facilities on the environment, including increasing the organic share in aquaculture, improving husbandry conditions and animal health, increasing resource efficiency, improving water quality and the quality of effluent water (reducing chemicals, reducing the use of pharmaceuticals, etc.). Sustainable and extensive production is



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supported by measures to reduce environmental impacts (increasing the organic share, reducing the use of inputs such as medicines and chemicals, improving animal health, etc.). This contributes to the goals of the European "Biodiversity Strategy", the "Strategic Guidelines for Sustainable Aquaculture Development" and the "Farm to Fork" strategy. Specific objective 2b) *"To promote the marketing, quality and added value of fishery and aquaculture products and the processing thereof"*. Investments in resource efficiency or to reduce environmental impact, including reduction of input use and waste treatment, for processing of by-products resulting from the main processing, as well as for the processing of organic aquaculture products. Organise regional, national or transnational communication and promotion campaigns to raise public awareness of sustainable, regional or organic/ecological fisheries and aquaculture products. Informing consumers about organic, sustainable or regional production contributes significantly to raising awareness among the population and subsequently to promoting sales.

Table 5.2: EMFAF 2021-2027 budget for Austria, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	15,000,000
EU contribution	6,718,094
National contribution	8,281,906
2a - Promoting sustainable aquaculture	10,820,256
2b - Developing competitive, transparent and stable markets for fishery and aquaculture products, including their processing	3,294,525

Source: Cohesion Open Data Platform of the European Commission

Croatia: The operational programme supports the development of organic aquaculture through Priority: 2 "Enhancing the marketability of aquaculture activities and the transfer and marketing of fishery and aquaculture products, thereby contributing to the food security of the Union". Specific objective 2.1 "Promote marketable aquaculture activities, in particular increasing the competitiveness of aquaculture production, for contemporary recovery long-term environmental sustainability of activities". The activities of support to the environmentally sustainable aquaculture through the promotion of the use and implementation of organic production and the provision of services for the protection of the environment on the part of the aquaculture industry are also recommended, as are aquaculture methods which are in line with the specific needs of the environment.

Denmark: The operational programme supports the development of organic aquaculture through Priority 2 "*Promote sustainable aquaculture activities and the processing and marketing of fisheries and aquaculture products, thereby contributing to food security in the Union*". Specific objective 2.1 "*Promote sustainable aquaculture activities, in particular strengthening the competitiveness of aquaculture production, while ensuring that activities are environmentally sustainable in the long term*".



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Table 5.3: EMFAF 2021-2027 budget for Croatia, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	348,124,355
EU contribution	243,687,047
National contribution	104,437,308
2.1 - Promotion of sustainable aquaculture activities, in particular increasing the competitiveness of aquaculture production, and at the same time ensuring the long-term sustainability of the activity	67,292,529
2.2 - Promoting the marketing, quality and added value of fishery and aquaculture products and the processing of these products	70,516,716

Source: Cohesion Open Data Platform of the European Commission

In the National Multi-Annual Aquaculture Strategy 2021-2027, six benchmarks have been identified with funding options (see Section 6.2).

Table 5.4: EMFAF 2021-2027 budget for Denmark, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	287,099,013
EU contribution	200,969,309
National contribution	86,129,704
2.1 - Promote sustainable aquaculture activities, in particular strengthening the competitiveness of aquaculture production, while ensuring that activities are environmentally sustainable in the long term	16,816,338
2.2 - Promote the marketing and processing of high-quality fishery and aquaculture products	6,764,113

Source: Cohesion Open Data Platform of the European Commission

France: The operational programme supports the development of organic aquaculture through Priority 2 *“Promote sustainable aquaculture activities and the processing and marketing of fisheries and aquaculture products, thereby contributing to food security in the Union”*. Specific objective 2.1 *“Promote sustainable aquaculture activities, in particular strengthening the competitiveness of aquaculture production, while ensuring that activities are environmentally sustainable in the long term”*. Modernization of production, increase of production capacities including seaweed farming and organic aquaculture. Support for the conversion to organic aquaculture. Research projects on the management of sanitary and zoo-sanitary risks, on animal welfare and organic aquaculture. Specific objective 2.2 *“Promote the marketing, quality and added value of fishery and aquaculture products, as well as the processing of these products”*.



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Table 5.5: EMFAF 2021-2027 budget for France, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	793,306,005
EU contribution	567,136,526
National contribution	226,169,479
2.1 - Promote sustainable aquaculture activities, in particular strengthening the competitiveness of aquaculture production, while ensuring that activities are environmentally sustainable in the long term	160,380,761
2.2 - Promote the marketing, quality and added value of fishery and aquaculture products, as well as the processing of these products	120,147,561

Source: Cohesion Open Data Platform of the European Commission

Germany: The operational programme supports the development of organic aquaculture through Priority 2 “Promote sustainable aquaculture activities and the processing and marketing of fisheries and aquaculture products, thereby contributing to food security in the Union”. Specific objective 2.1 “Promote sustainable aquaculture activities, in particular strengthening the competitiveness of aquaculture production while ensuring the long-term environmental sustainability of these activities”. Conversion to organic aquaculture and certifications according to organic or other sustainability standards. Specific objective 2.2 “Promote the marketing, quality and added value of fishery and aquaculture products, as well as the processing of these products”. Operations related to the identification or application of new ideas that are useful in finding solutions to marketing issues. Examples include the identification and development of new markets for species that currently have little or no market value and responses to the need to respond to new market demands such as the sale of organic products or the registration of trademarks.

Table 5.6: EMFAF 2021-2027 budget for Germany, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	302,588,121
EU contribution	211,811,682
National contribution	90,776,439
2.1 - Promote sustainable aquaculture activities, in particular strengthening the competitiveness of aquaculture production, while ensuring that activities are environmentally sustainable in the long term	88,226,275
2.2 - Promote the marketing, quality and added value of fishery and aquaculture products, as well as the processing of these products	16,479,258

Source: Cohesion Open Data Platform of the European Commission



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Greece: The operational programme supports the development of organic aquaculture through Priority 2 “Fostering sustainable aquaculture activities, and processing and marketing of fisheries and aquaculture products, thus contributing to food security in the Union”. Specific objective 2.1 “Promoting sustainable aquaculture activities, especially strengthening the competitiveness of aquaculture production, while ensuring that the activities are environmentally sustainable in the long term”. Investments to promote low-impact aquaculture (including organic aquaculture) and aquaculture providing environmental services. Investments to reduce energy consumption and carbon emissions in the production and transport of products.

Table 5.7: EMFAF 2021-2027 budget for Greece, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	519,637,180
EU contribution	363,746,026
National contribution	155,891,154
2.1 - Promoting sustainable aquaculture activities, especially strengthening the competitiveness of aquaculture production, while ensuring that the activities are environmentally sustainable in the long term	88,800,000
2.2 - Promoting marketing, quality and added value of fisheries and aquaculture products, as well as processing of those products	41,600,000

Source: Cohesion Open Data Platform of the European Commission

Ireland: According to Mission 2 “An Innovative, Competitive and Resilient Seafood Sector, driven by Technology and Talent” i) EMFAF will support innovation and production efficiency, and will also aim at increasing organic aquaculture and increasing its competitiveness in relation to imported organic aquaculture products; ii) EMFAF-funded research and innovation should in particular invest in areas such as organic aquaculture. The operational programme supports the development of organic aquaculture through Priority 2 – “Fostering sustainable aquaculture activities, and processing and marketing of fisheries and aquaculture products, thus contributing to food security in the Union”. Enhance Ireland’s organic aquaculture positioning and competitiveness through supporting organic seafood production, meeting the highest standards available for EU producers, and through improved labelling and traceability of organic products.



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Table 5.8: EMFAF 2021-2027 budget for Ireland, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	258,369,552
EU contribution	142,369,552
National contribution	116,000,000
2.1 - Promoting sustainable aquaculture activities, especially strengthening the competitiveness of aquaculture production, while ensuring that the activities are environmentally sustainable in the long term	29,460,000
2.2 - Promoting marketing, quality and added value of fisheries and aquaculture products, as well as processing of those products	68,636,000

Source: Cohesion Open Data Platform of the European Commission

Italy: The operational programme supports the development of organic aquaculture through Priority 2 “*Fostering sustainable aquaculture activities, and processing and marketing of fisheries and aquaculture products, thus contributing to food security in the Union*”. Specific objective 2.1 “*Promoting sustainable aquaculture activities, especially strengthening the competitiveness of aquaculture production, while ensuring that the activities are environmentally sustainable in the long term*”. Studies and research on the organic management of fish farms (e.g., genetic improvement, juvenile stages, feed). Conversion of conventional aquaculture production methods towards organic aquaculture. Increase in the number of operators engaged in organic aquaculture by a further 5% compared to the 2014-2020 period. Specific objective 2.2. “*Promote the marketing, quality and added value of fishery and aquaculture products, as well as the processing of these products*”. Facilitating access to new markets and/or better marketing conditions for products obtained with methods with limited impact on the environment and/or organic aquaculture.

Table 5.9: EMFAF 2021-2027 budget for Italy, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	987,290,803
EU contribution	518,216,830
National contribution	469,073,973
2.1 - Promoting sustainable aquaculture activities, especially strengthening the competitiveness of aquaculture production, while ensuring that the activities are environmentally sustainable in the long term	146,000,000
2.2 - Promoting marketing, quality and added value of fisheries and aquaculture products, as well as processing of those products	194,432,948

Source: Cohesion Open Data Platform of the European Commission



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Spain: The operational programme supports the development of organic aquaculture through Priority 2 “Fostering sustainable aquaculture activities, and processing and marketing of fisheries and aquaculture products, thus contributing to food security in the Union”. Specific objective 2.1 “Promoting sustainable aquaculture activities, especially strengthening the competitiveness of aquaculture production, while ensuring that the activities are environmentally sustainable in the long term”. Support to conversion and certification of organic aquaculture and environmental management systems. Specific objective 2.2 “Promote the marketing, quality and added value of fishery and aquaculture products, as well as the processing of these products”. Promotion of the quality and added value of products of organic aquaculture, packaging and presentations. Promote the processing of organic aquaculture products.

Table 5.10: EMFAF 2021-2027 budget for Spain, including allocation to organic-relevant objectives

Budget category	€ Budgeted
Total allocation	1,574,231,320
EU contribution	1,120,441,924
National contribution	453,789,396
2.1 - Promoting sustainable aquaculture activities, especially strengthening the competitiveness of aquaculture production, while ensuring that the activities are environmentally sustainable in the long term	219,270,720
2.2 - Promoting marketing, quality and added value of fisheries and aquaculture products, as well as processing of those products	382,279,497

Source: Cohesion Open Data Platform of the European Commission

5.2.3. Conclusions

Similar to the Multi-annual National Plans for Aquaculture of the countries considered (see Chapter 6), the identification of objectives and activities aimed at promoting the development of organic aquaculture in the national programmes of the EMFF 2014/20 and then of the EMFAF 2021/27 is not very detailed compared to the identification of key actions for the development of a "sustainable" conventional aquaculture.

On the other hand, both the EMFF and EMFAF national programmes, rather than developing a detailed analysis of the actions to be carried out for the development of organic aquaculture, refer to what is specified in other documents and, especially, in the Multi-annual National Aquaculture Plans (2014-2020) and (2021-2027).

Unfortunately, also the updating by the Member States of the common indicators of achievement related to the EMFF 2014/2020 is rather late or imprecise (see Table 5.1). Therefore, it is not possible to make a full assessment regarding the actual degree of the use of funds made available to organic aquaculture.



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The identification of objectives and activities aimed at promoting the development of organic aquaculture is relatively more developed in the national programmes of Denmark and Ireland. But, as there is no consolidated data on the actual use of European funds for the development of organic aquaculture specifically, we can only observe that the planned funds for the aquaculture in general have increased almost everywhere in the EMFAF 2021-2027 compared to the EMFF 2014-2020 (see Figure 5.5). Furthermore, it should be noted that this increase in funds available for the development of aquaculture does not necessarily turn into effective expenditure, because the multiple local administrations responsible for the expenditure are not always able to support the development programmes and /or may be induced to change spending priorities.

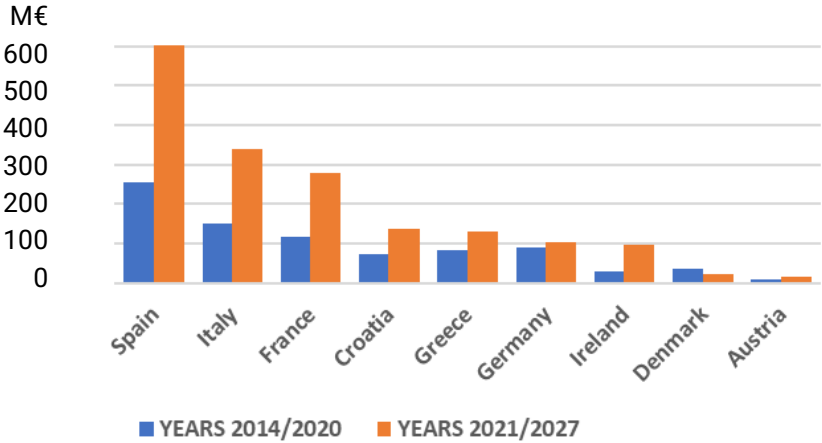


Figure 5.5: Budgets planned by Member States for the development of aquaculture in the EMFF (2014-2020) and EMFAF (2021-2027) national programmes

Source: Cohesion Open Data Platform of the European Commission



6. Multi-annual National Strategic Plans for Aquaculture and Organic Aquaculture

6.1. Overview of the 27 Multi-annual National Aquaculture Plans (2014-2020)

The Common Fisheries Policy (CFP) places an increased emphasis on the sustainable development of aquaculture. It requires EU Member States to establish a Multi-annual National Strategic Plan for the development of aquaculture activities. The multi-annual national strategic plans 2014-2020 included the Member States' objectives and the funding, administrative and other measures to be pursued to achieve the expected results. Here, after a brief general assessment, we are going to report if and how organic aquaculture is supported in the following multi-annual plans of: Austria, Croatia, Denmark, France, Germany, Greece, Ireland, Italy and Spain, whose organic aquaculture production represents about 80% of the whole Europe. It is worth highlighting a possible limitation of the analysis carried out, due to the availability of consulted documents only in the official language of each country. The translation process may in some cases not have adequately grasped the meaning of the texts.

1. Simplification of administrative procedures

Most Member States acknowledge that administrative procedures are long and cumbersome. Administrative complexity stems from the number of ministries involved, the different national and regional regulatory requirements (e.g., national transposition of the Water Framework Directive (WFD), the Marine Strategy Framework Directive (MSFD)²⁹, Bird and Habitat Directives (Sundseth, 2014)) impacting aquaculture activities. Bulgaria, Croatia, France, Germany, Greece, Italy, Malta, Romania, Slovakia, Spain and the United Kingdom proposed to set up inter-Ministry coordination groups to review the applicable legislation, simplify it, and streamline application procedures. The involvement of stakeholders in the decision-making process, by means of specific fora was promoted, by some Member States (e.g. Bulgaria, Denmark, Ireland, Italy, Finland, France and the United Kingdom). Italy planned to create a one-stop-shop for license applications in particular to support regional administrations. France planned to consolidate its existing one-stop-shop, while the Czech Republic, Ireland and Portugal planned to develop single web portals for submission and follow-up of applications.

²⁹ Directive 2008/56/EC of the European Parliament and of the Council of 17 June 2008 establishing a framework for community action in the field of marine environmental policy (Marine Strategy Framework Directive). <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32008L0056>, accessed 24.01.24



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2. Coordinated spatial planning

In marine areas, some Member States concerned planned to take up the opportunity offered by the Marine Spatial Planning Directive³⁰ to map existing aquaculture facilities, and identify suitable potential aquaculture areas and their environmental relationships with other marine activities. In all Member States, spatial planning is expected to constitute an important tool used by relevant administrations to inform the decision-making process for license applications for both maritime and continental aquaculture.

3. Enhancing the competitiveness of EU aquaculture

All Member States have planned to enhance competitiveness focusing on: i) importance of research and development, ii) cooperation of stakeholders, iii) promotion of environmentally sustainable practices, iv) diversification, and v) marketing.

4. Promoting a level playing field for EU operators

Cyprus, Greece, Italy, Romania, Sweden and the United Kingdom foresaw the support of Producer Organisations to assist their members in areas such as the development of traceability schemes or codes of conduct and obtaining certifications. Promotion of certification was considered an important tool by Bulgaria, Estonia, Finland, Greece, Ireland, Italy, Romania, Spain and Sweden. The position of aquaculture products on the market needs to be improved, compared to potential substitutes. For this reason, marketing and promotion campaigns were announced by Austria, Belgium, Cyprus, Denmark, Lithuania and Malta.

5. Inclusion of organic aquaculture

Specific references to organic aquaculture were made in several National Strategic Plans, summarised here:

Austria. Over the past few years Austria has developed the successful path of quality production, this includes also organic fish, and this strategy is confirmed toward 2020.

Croatia. Although the MS SWOT analysis in the plan identified the development of organic fish farming among the “Opportunities”, for both Marine and freshwater aquaculture, no reference on organic aquaculture was reported among the objectives and priority of the multi-annual plan 2014-2020.

³⁰ Directive 2014/89/EU of the European Parliament and of the Council of 23 July 2014 establishing a framework for maritime spatial planning. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32014L0089>, accessed 24.01.24



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Denmark: The goal was for a significant share, up to 10%, of seafood production to be organic by 2020. Investments in environmentally efficient and competitive technologies would be supported, with a view to reduced environmental impact and economic optimisation of production, including prioritising investments in organic production and new, more environmentally efficient, forms of production.

France: National orientations and objectives toward 2020 were:

- Support investments facilitating conversion to organic aquaculture, including when they concern safety and health at work.
- Consolidate support measures for aquaculture by providing environmental services in the fields of organic aquaculture, fish farming in ponds, but also shellfish farming.
- Support all initiatives aimed at improving the image of aquaculture products whose origin and quality are guaranteed: e.g., support for organic aquaculture.
- Promote the organization of technical itineraries allowing the obtaining of quality labels or organic aquaculture label.

Germany: Although the MS SWOT analysis in the plan identified the development of organic fish farming among the “Opportunities”, for both Marine and freshwater aquaculture, no reference on organic aquaculture was reported among the objectives and priority of the multi-annual plan 2014-2020.

Greece: The following objectives were identified by the multi-annual plan:

- The promotion of new forms of aquaculture, which minimize the impact on the environment, as well as the introduction of ecological management and control systems and organic aquaculture methods.
- The conversion of conventional aquaculture production to organic aquaculture, participation in ecological management and ecological control systems, promotion of methods that can contribute to the conservation and improvement of the environment, biodiversity, landscape and management of traditional aquaculture areas.

Ireland: The MS SWOT analysis in the plan identified the production of organic species among the “Strengths” of the aquaculture industry. The vision for 2020 is summarized as follow: “*A sustainable and competitive aquaculture sector, where production will grow according to market and consumer demands and in balance with nature and society*”. In order to progress towards this vision, it was proposed the Action 3 “Promote organic aquaculture practices and certification”. Significant support to the development of organic aquaculture was also foreseen with Action 5 “*Foster knowledge, innovation and technology transfer*” and Action 8 “*Support best husbandry and disease management practice*”.



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Italy: The MS SWOT analysis in the plan identified organic aquaculture among the “Strengths” of the aquaculture industry. The following actions were identified by the multi-annual plan:

- Promote actions for the development of highly environmentally compatible aquaculture (e.g., forms of multitrophic aquaculture, organic aquaculture).
- Promote actions to the qualification of the Italian product and the conversion of conventional aquaculture production methods towards organic aquaculture.

Spain: The MS SWOT analysis in the plan identified the organic aquaculture among the “Opportunities” of the aquaculture industry. The following strategic action was identified by the multi-annual plan: Promotion of the organic aquaculture through the granting of aid for the conversion of conventional aquaculture production methods to organic aquaculture.

6.2. Overview of the Multi-annual National Aquaculture Plans (2021-2027)

Here, as for the Multi-annual National Aquaculture Plans 2014-2020, we report if and how organic aquaculture is supported in the multi-annual plans of Austria, Croatia, Denmark, France, Germany, Greece, Ireland, Italy and Spain, whose organic aquaculture production represents about 80% of the whole Europe. It is worth highlighting a possible limitation of the analysis carried out, due to the availability of consulted documents only in the official language of each country. The translation process, therefore, may in some cases not have adequately grasped the meaning of the texts.

Austria: The overall national objective is “Securing a sustainable Austrian aquaculture and fisheries sector”. To achieve this overall objective, the following targets are set:

- Adaptation of the aquaculture and fisheries sector to climate change (“Fit for Climate Change”) and further orientation towards sustainability and biodiversity. In order to make the sector as “fit for climate change” as possible and to prepare it for the relevant developments or, if necessary, to counteract them, an adaptation of the production and processing procedures is being pursued for further greening in order to reduce negative impacts on the environment and climate to a minimum and to focus even more on sustainability. The development of new technologies in the area of production, processing and marketing are necessary and need to be promoted. These include, for example, new stocking fish species adapted to climate change or increased development towards organic production. The value of Austria’s ponds and their multifaceted contribution to environmental and climate protection as well as to biodiversity in the sense of the European Commission’s Biodiversity Strategy should be particularly emphasised.



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- Increasing the quality of local products and regional added value from aquaculture and fisheries. In carp pond management, a clear incentive for particularly sustainable management practices is to be created by increasing the area premiums from national financial resources for the ecologically valuable, extensive management of ponds as a whole, as well as through additional financial support for the organic management of ponds. The future direction of the national aquaculture and fisheries sector requires a focus on regionality and origin labelling, traceability, organic footprint and animal welfare. The existing national quality labels and certified production methods, especially organic production, should be further expanded.

It should be noted at the outset that the implementation of the measures listed above will be supported as far as possible by funding from the Austrian EMFAF Programme 2021-2027. However, due to the limited financial resources available under the EMFAF, individual measures, such as the sustainable, extensive management of ponds, will be implemented through national financial support.

Croatia: The National Plan for the Development of Aquaculture for the period up to 2027 (NPRA) focuses on four specific objectives:

1. Increasing the productivity and resilience of aquaculture production to climatic variability;
2. Increasing the competitiveness of the aquaculture sector;
3. Contributing to the economic recovery and to the improvement of the quality of life in rural and coastal areas through the development of the aquaculture sector;
4. Fostering innovation in the aquaculture sector.

Further steps to increase the environmental success of EU aquaculture include the growth of organic aquaculture, as foreseen in the Farm to Fork strategy and the EU Action Plan for the development of the organic sector. Increasing the use of better practices and management systems in accordance with public and private quality standards and certification programmes, in particular those governing organic food, environmental protection and environmental sensitivity, food safety and food for life, health and welfare, food labelling and information on food (food business), the sustainability of food production and processing aquaculture.

- *Encouraging the development of new higher value-added products in aquaculture.* The introduction of new species into aquaculture will be encouraged, in particular those that show good market potential and offer additional value. Within this measure, activities that contribute to the development of organic aquaculture will also be supported, in particular from conventional to organic production and eco-schemes.
- *Promotion of aquaculture and gastro-destination tourism products.* Gastronomic tourism will require increased investment in local value-added products that meet public and/or private quality standards, including designations of origin and



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organic products, as well as investments in local "Farm to Fork" initiatives with creative/ productive partnerships between producers, tourist organisations and restaurants.

Denmark: The Strategy for a Sustainable Aquaculture Sector 2021-2027 has been put forward in preparation for the European Maritime, Fisheries and Aquaculture Fund (EMFAF) - Danish Programme 2021-2027. The strategy is based on six benchmarks, four of which include specific measures for organic aquaculture:

- *Benchmark 3: Organic aquaculture.* Conversion to organic aquaculture can mean improved animal welfare and reduced use of medicines and processing aids in fish farming. However, one of the main challenges in promoting organic production is the EU rules on organic production, which severely restrict the use of environmental technologies. EU organic rules include limits on water recirculation and permitted levels of system closure. Other challenges are higher production costs and costs associated with conversion to organic aquaculture. There is also the need to improve consumer awareness of organic aquaculture, mainly because of the relatively small scale of production. With the agreement on the Sea, Fisheries and Aquaculture Programme 2021-2023, the theme Green Transformation Aquaculture has been allocated DKK 21.0 million for grants for investments in climate solutions and purification technology to reduce the aquaculture sector's climate footprint and emissions of nitrogen, phosphorus and organic matter to the surrounding environment, including in organic aquaculture, and DKK 27.6 million for development projects, including organic aquaculture. The Ministry of Food, Agriculture and Fisheries will work to change EU rules for organic aquaculture to allow more use of technological solutions in production.
- *Benchmark 4: Research, development and innovation.* There is a continuing need to support research, development and innovation in the aquaculture sector, particularly in the following themes: i) green technology, ii) fish welfare, iii) fish feed, iv) climate footprint. In addition to the above, there is a continuing need for research, development and innovation in areas such as prevention and treatment of fish diseases, effective vaccines, organic production, circular economies (e.g. fish manure), and economic analysis (employment, profitability, management models, etc.).
- *Benchmark 5: Product development, marketing and consumer information.* Producer organisations aim to create the best conditions for the marketing of their members' products. There is also the need to promote the working environment in the sector. Producer organisations can, in addition, carry out marketing campaigns for new products or specific product groups, such as seaweed or organic aquaculture products.
- *Benchmark 6: Training and skilled labour.* In the future, fish farming will become a more complex and specialised task, requiring skills ranging from fish welfare to technological understanding. The lack of training provision specifically to train personnel capable of working in the aquaculture sector, is a concern for several



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stakeholders. The structural evolution of the sector is increasing and requires specific knowledge and experience, where current vocational training options do not adequately cover the needs according to several stakeholders. In addition, there is a need for better knowledge on organic production and animal welfare in fish farming.

France: The production with quality label is currently encouraged in France since the meals served in collective catering, in all establishments entrusted with a public service mission, must include 50% quality and sustainable products, of which at least 20% organic products, starting from January 1, 2022. The new 2021-2027 strategy aims to further develop French aquaculture maintaining a high level of economic and environmental performance in the sectors. In this context, the national aquaculture strategy identifies, among other, these actions:

- continue to promote French aquaculture products that meet consumer demand, through the development of official quality labels, environmental certification and organic production;
- implement compensation for conversion from conventional to organic production in fish farming;
- support investments in organic aquaculture production;
- support collective projects to improve the quality of coastal waters by developing organic shellfish farming.

Germany: The National Strategic Plan for Aquaculture in Germany 2021/2030 deals only marginally with organic aquaculture. According to the Strategic Plan, certified organic aquaculture, which currently only accounts for a very small market share of aquaculture products in Germany, is only seen by a smaller group of consumers as an alternative to buying conventional products. Example farms with "transparent production" and increased general consumer education (advertising campaigns) could increase consumer acceptance of organic aquaculture. Consumer information will play an even more important role in the future and may need to be reoriented, e.g. by consistent labelling of local products with regard to their origin and form of production (organic).

Greece: As in the case of Germany, the Greek Multi-annual National Strategic Plan for the Development of Aquaculture 2021/2030 deals only marginally with organic aquaculture. It is reported that organic (biological) aquaculture and other systems with an even lower environmental footprint such as recycled water systems and integrated multi-trophic systems will be supported by the multi-annual plan.

Ireland: The National Strategic Plan for Sustainable Aquaculture Development 2030 envisages as a key activity to enhance transparency and traceability of organic products with the use of digital tools. Irish aquaculture should further move to organic seafood production, where possible, meeting the highest standards available for EU producers and in line with the Ireland's goals for increasing organic production under the Organic



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Strategy. In-combination with the National Strategic Plan for Sustainable Aquaculture development 2030 other actions have been put in place under the current Irish Organic Action Plan 2019-2025 (see Chapter 3):

- Promote organic aquaculture products in new and existing markets.
- Explore potential for Irish organic mussels in export markets.
- Arrange technical seminars to improve producer knowledge of organic systems and legislation.
- Highlight requirement for organic feed and feed ingredients and explore potential for Irish source of organic feed.
- Identify and secure sources of organic juveniles and ova.

Recent researches into the application of principles of organic agriculture to aquaculture identified that many of the principles relate to soil-based agriculture may need further consideration to apply to aquatic systems.

Italy: The strategic lines of the multi-annual plan find financial programming in the EMFAF 2021-2027 and in the other European funds. As far as organic aquaculture is concerned, the following priorities are established:

- Promote and support the creation and development of sustainable aquaculture systems (aquaponics, multi-trophic aquaculture, lagoon fish farming, etc.) and/or which provide the provision of environmental services, including through support for organic certification.
- Higher priority will be given to actions for the mitigation of environmental impacts, through the creation and/or modernization of aquaculture systems with reduced greenhouse gas production and with CO₂ sequestration functions (for example shellfish and fish farming). In order to prioritise such actions, companies that have obtained or are pursuing sustainability certifications (e.g. organic certification) will be rewarded.
- Promote and encourage the adoption by aquaculture farms of sustainable, highly eco-compatible production models that offer environmental services based on the efficient use of resources, in order to improve the environmental performance of production activities (e.g. organic certification).
- In order to qualify the Italian product and facilitate competition with imported products, the conversion of conventional aquaculture production methods towards organic aquaculture are supported.

Spain: In the framework of the strategic guidelines for a more sustainable and competitive aquaculture 2021/2030, it is planned to promote a more sustainable and efficient aquaculture and contribute to the good environmental state. The use of best practices will be encouraged in areas such as energy or water consumption, or the search for new forms of feeding that are less intensive in the use of fish meal/oil, as well as the promotion of practices that are more respectful of the environment, including organic production, multitrophic systems or the cultivation of species with lower trophic levels and algae. The development of shellfish farms with organic certification will be encouraged too. Also, studies on organic aquaculture will be promoted.



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6.2.1. Conclusions

In general, the analysis of the state of organic aquaculture is poorly developed in the Multi-annual National Aquaculture Plans of the countries considered. Consequently, even the identification of objectives and activities aimed at promoting the development of organic aquaculture is rather marginal in comparison to the effort spent to analyse and promote key actions for developing “sustainable” conventional aquaculture.

While referring to the recommendations expressed in the new strategic guidelines for the sustainable development of European aquaculture adopted by the European Commission in 2021, which give a higher priority to organic aquaculture, countries seem to pay more attention to other forms of “sustainability”, anyway hinged on a conventional aquaculture context.

Over five years after the approval of the EU Reg 2018/848, organic aquaculture has not exhibited the same sharp growth trend shown by organic agriculture. Indeed, after an initial phase of development, in some countries, it has shown signs of stagnation if not regression. With two exceptions, such as organic salmon farming and, more recently, organic mussel farming. Indeed, it is worth mentioning that organic salmon represents about 75% of salmon farming and organic mussels represent 10% of mussel farming, all other organically farmed species range between 2 and 4% of the total production.

A recent review of the organic aquaculture literature (see OrganicTargets4EU Deliverable D1.3) highlights several factors still hindering the development of the organic aquaculture in the EU. It was mostly reported that the price relation between organic and conventional products is still not sufficient to support the organic aquaculture extra-costs. Thus, accessibility to communication, as well as marketing strategies, might help to support the “Consumer demand/willingness to buy”. But there are also other relevant issues, hindering the development of organic aquaculture in the EU. Such issues are mainly related to the “Unavailability of organically produced inputs”. According to the conclusions reached by the analysis of the literature cited, it would appear that the full application of the regulation on organic aquaculture before a greater diffusion and consolidation of production and, above all, before the main technical problems have been solved, has not fostered the hoped-for growth of organic aquaculture.

Interestingly, two of the multi-annual national plans here analysed (i.e. Denmark and Ireland) expressly demand a revision of some aspects of the current regulation on organic aquaculture.

The key conclusion may be that to achieve the Farm to Fork Strategy objective of having “at least 25% of the EU’s agricultural land under organic farming by 2030 and a significant increase in organic aquaculture” it is necessary to have the support of all relevant actors, including EU Member States, the EU aquaculture industry, the scientific institutions, other stakeholders such as NGOs, and ... the Commission itself.



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7. Discussion and conclusions

In this report we have documented the changes in policy support for organic agriculture and organic aquaculture in the European Union and some close neighbours, between the previous EU programming period (2014-2020) and the current one (2023-2027 for agriculture, 2021-2027 for aquaculture). How far do the changes identified address the challenges of reaching the Farm to Fork and Biodiversity Strategy targets of 25% organic land area and a significant increase in organic aquaculture by 2030? Overall, despite the significant policy support, there still seems to be a need for institutional change and capacity building. It is questionable whether enough is being done to meet the EU's strategic targets and considering the environmental benefits that the achievement of the 25% organic share of land area and the increase in aquaculture target could deliver.

The results, summarised in Table 7.1, show that there have been a number of steps taken to maintain and enhance organic support, with the EU Commission playing a leading role:

- All Member States (MS) have implemented policies to support conversion to and maintenance of organic farming, including the Netherlands, which had not provided support in the previous two CAP programming periods, and France, which halted maintenance payments in 2018. Similar support policies have been implemented in neighbouring countries, including CH, NO and UK.
- All MS included detailed sections on organic farming in their CSPs, with details of planned payment rates, eligibility conditions, estimated uptake and expenditure. For countries such as Spain, Italy, Germany and France, which had previously had regional rural development plans, substantial detail on regional variations in payment rates and expenditures were also included.
- All Member States have set targets for organic land area to be achieved by 2027 or 2030, in either the CAP Strategic Plans (CSPs) or national organic action plans (OAPs), or in a few cases separately. The neighbouring countries CH, NO and UK do not have similar targets.
- MS have planned to double the land area supported from 5% to 10% of EU UAA, and to nearly double the expenditure on organic land area support by 2027/8 compared with 2018. They have budgeted for more than €3.4 billion in annual support payments for organic farming by 2027/8, which compares with €1.8 billion in 2018, an increase of 89%. In total, more than €15 billion have been budgeted for organic farming area support in the five-year period 2023-2027, equivalent to 5% of total CAP expenditure, and 20% of expenditure on environmental (Pillar 1 eco-schemes and Pillar 2 agri-environment) measures. These figures hide a wide degree of variation among individual MS.



Table 7.1: Summary overview of organic farming support implemented in the European Union, 2023-2027

Policy measure	European Union	Member States (range)	Number of Member States	Further information
Included in CAP Strategic Plans	Encouraged	Possible	All	Figure 2.1 Table 2.4
Targets for organic land area (% of UAA by 2030)	25%	5% (RO) to 35% (AT)	All	Figure 2.1
Planned organic area support (M€, 2023-2027)	15,809	2 (MT) to 2,725 (FR)	All	Tables 2.3, 2.4
Share of total land area supported (% UAA, 2027)	10%	2.5% (MT) to 21% (CZ)	All	Figure 2.1
Change compared with 2018 (%)	+100%	+20% (ES) to +400% (LU) ^a	All	Table 2.2
Average annual expenditure (€/ha supported, 2027)	205	113 (EE) to 585 (BG) ^c	All	Table 2.2
Change compared with 2018 (%)	-4%	-43% (CY,IT) to +175% (PL) ^c		Table 2.2
Share of environmental support (% of P1 & P2)	20.3%	6.2% (NL) to 50.4% (GR)	All	Table 2.4
Share of CAP Budget (%. 2023-2037)	5.2%	1.4% (MT) to 11.2% (GR)	All	Table 2.4
Use of P1 Eco-schemes	Possible	Possible	11	Table 2.5
Use of P2 Environmental	Possible	Possible	24	Table 2.5
Maintenance support (e.g., arable €/ha)	Not estimated	97 (LV) to 785 (SI) ^b	All	Figure 2.2; Table 9.1
Conversion support higher than maintenance	Possible	+5% (CZ) to >100% (FR)	18	Table 2.5 Table 9.2 Factsheets ^d
Other RDP support	Possible	Possible	Most	Section 2.3
Organic Action Plans	2021-2030	2019-25 (IE) 2024-30 (FR)	25	Figure 3.1 Tables 3.3, 3.4, Tables 9.3, 9.4
Market targets	None	5-15% RSV ^e 20-60% proc. ^f	14	Table 3.3

a. MT over 4,000%; b. MT 3614 €/ha; c. MT 3913 €/ha average, +945% cf. 2018 (374€/ha)

d. country factsheets published at <https://organictargets.eu>; e. retail sales value; f. procurement

Source: own compilation derived from national CAP Strategic Plans and Organic Action Plans and other sources identified in Figures, Tables and Annexes as specified under further information



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- Almost all MS have national or regional organic action plans in place, which permit the integration of supply-push policies such as the area support payments with more demand-pull market- and information-focused policies, and can help to get a balance between public good environmental and private sector economic outcomes. Many of the policies, including investment aids for production and processing, producer organisations, advice, training and EIP operational groups, are funded as sector or rural development measures, but without ring-fenced funding for organic support or statistical data to quantify outputs. Others including public procurement, promotion and research are funded from other EU or national programmes, with resources and targets easier to identify.

For aquaculture, enhanced policy support for organic aquaculture has also been identified:

- Organic aquaculture policy is supported at European level by the 2021-2030 strategic guidelines for the sustainable development of EU aquaculture. These guidelines cover all issues that are relevant for the sustainable development of aquaculture in the EU and provide concrete recommendations to the Commission, Member States, aquaculture producers and other relevant actors, such as NGOs.
- These recommendations include i) the promotion of organic aquaculture and other aquaculture systems with lower environmental impact; ii) the promotion of organic aquaculture certification and labelling; iii) the promotion of organic production which sets out more specific requirements on animal welfare, such as maximum stocking-density levels, restrictions on the use of artificial light and oxygen, etc.; and iv) the implementation of spatial planning measures that ensure to make available special areas for organic aquaculture.
- At national level, the organic aquaculture policies are included in the “Multi-annual Strategic Plans for Aquaculture”. In general, the analysis of the state of organic aquaculture is poorly developed in these plans. Consequently, even the identification of objectives and activities aimed at promoting the development of organic aquaculture is rather marginal in comparison to the effort spent to analyse and promote key actions for developing “sustainable” conventional aquaculture. Actions for organic aquaculture, including research, were also identified in the national organic action plans that are mainly focused on land-based production.
- In the same way as in the Multi-annual National Strategic Plans for Aquaculture, the identification of objectives and activities aimed at promoting the development of organic aquaculture in the national programmes of the European Maritime and Fisheries Fund (EMFF) 2014-2020 and the European Maritime, Fisheries and Aquaculture Fund (EMFAF) 2021-2027 is not very detailed compared to the identification of key actions for the development of a “sustainable” conventional aquaculture.

Table 7.2: Summary overview of organic aquaculture support implemented in the European Union, 2021-2027

Policy measure	European Union	Member State examples	Number of Member States	Further information
Included in CFP Strategic Guidelines for Aquaculture	Yes (incl. promotion, certification, labelling, inputs, practices, zoning, research)	Possible (see below)	No data	Chapter 5
Funded by European Maritime, Fisheries and Aquaculture Fund (2021-27)	2.1 Promoting sustainable aquaculture; 2.2 Promoting marketing, quality, value and processing	Possible, funded on individual project basis	All 9 analysed (representing 80% of EU organic aquaculture production)	Section 5.2.2
Actions included in Multi-annual National Strategic Plans for Aquaculture (2021-2027)	Inclusion of organic aquaculture	Possible, funded on individual project basis. Climate change adaptation (AT, HR); financial/ conversion support (AT, FR, GR, HR, IT,); investments (DK, FR); group projects (FR); promotion (DE, FR; HR, IE); exports (IE); certification/ labelling (DK, IE, IT); technical issues, knowledge/ innovation (IE, ES)	All 9 analysed (representing 80% of EU organic aquaculture production)	Section 6.2
Included in Organic Action Plans	Yes (Action 17 – see p. 45)	Financial support (CY, MT, PL); exports (FI); investment (LV, SI); certification (MT), advice/ information (CY, EE, IT, PL); training (BG); research (BG, CY, FI, LV); consumer promotion (HR, MT); market data (IE, PT)	12	Tables 9.3, 9.4

The analysis for aquaculture is defacto qualitative due to the absence of statistical data specifically on support for organic.

Source: own compilation derived from national CStrategic Plans and Organic Action Plans and other sources identified under further information



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- It is not possible to make a full assessment regarding the actual use of funds for organic aquaculture due to the lack of relevant indicators and statistical data. The increase in funding in the current period (2021-2027) compared with the previous period (2014-2020) provides scope for increased support for organic aquaculture, but no ring-fenced funding was identified, and the uptake of funding will depend on project submissions by organic companies.
- As part of the OrganicTargets4EU project, a review of the organic aquaculture literature highlights several factors still hindering the development of organic aquaculture in the EU. It was mostly reported that the price relationship between organic and conventional products is still not sufficient to cover the extra costs of organic aquaculture. There are other relevant issues, such as the lack of availability of organically produced inputs.

Despite the progress that is evident in policy terms, it is questionable whether enough is being done to meet the challenge of reaching the EU's ambitious strategic targets, or those of some member states. Even without the unanticipated challenges of Covid, the Ukraine war and inflation, which have brought challenges for the policy environment as well as for organic markets in some countries, the targets would have been difficult to achieve. A linear trend projection based on the five years growth from 2016 to 2020, suggests that 15% of EU UAA might be achievable by 2030 (Lampkin & Padel, 2023), while 18% would be consistent with the doubling of organic land area and trebling of organic market value every 10 years seen over the last 20 years (Willer et al., 2023). Taking all the MS national targets for organic farming into account, if they can be achieved, 20% of EU UAA may be reachable.

Getting to 25% will require greater drive and ambition, and more resources, not only for area-based policy support and market development, but also for knowledge exchange, research and innovation. There is a major challenge also due to the tripling of the number of producers needing access to information (advice, training and research), certification, financial and other services. More than one million new professionals in various sectors will need access to organic knowledge and information systems. This is a transformational change that requires more than an incremental development of previous policies. In many cases, radical changes to institutional structures and priorities, and a focus on capacity-building for the organic sector, will be required.

There will also be a need for greater clarity concerning the implementation of existing policy measures and the underlying principles. For example:

- *What is the role of governments and markets in supporting the organic sector?*
The multiple public and private outcomes attributable to organic farming create challenges reconciling environmental and economic development policy objectives, often the responsibility of different government departments (Stolze & Lampkin, 2009). Some governments have argued that if the organic sector has grown to the extent it has, the market alone should be capable of delivering



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continued growth. But if a key deliverable of organic farming is environmental benefits, should these not be supported as public goods by society as a whole, not just organic consumers?

- *Is a systems-based approach, with multiple objectives, an efficient approach to generating environmental benefits?* This has been much debated among agricultural economists, with the Tinbergen Rule sometimes being interpreted to mean that there should be one targeted policy measure for each objective and that multi-objective policy measures such as organic are inefficient. An analysis of organic farming support in Switzerland (Schader *et al.*, 2014), however, found that using a multi-objective, systems-based approach such as organic farming could provide a cost-efficient baseline for agri-environment policy, with targeted measures being used to fill the gaps.
- *How can potential conflicts between area-based payments and markets be reconciled?* At various times there have been concerns that support for conversion to organic farming may result in growth in supply faster than organic markets can absorb, causing problems for established organic producers reliant on organic price premiums to maintain their financial viability. There are also concerns that the wide variations in support rates between and within MS, in particular in those countries with highly differentiated payment rates for individual crop and livestock categories, could distort market competition. This does require careful attention to be paid to policy design, both in terms of the level and differentiation of payments by product, and of the administrative context (eligibility conditions, combinability with and competition from other support measures, interruptions in availability of support due to budget constraints or implementation issues). In principle, if policy support is consistent in its availability, it can provide a stable backdrop and not disrupt market development.
- *How effective are land area and other targets in guiding the development of the organic sector?* It is not clear that targets directly influence farms to convert or businesses to engage with organic food, as decisions will also be taken in response to market signals and other exogenous factors. They can, however, act as a clear signal of political commitment and, more importantly, help to ensure that resources are allocated at meaningful levels, as appears to be the case with respect to the Member States' responses to the EU organic targets.
- *Should organic price premiums be included in the calculation of maintenance payments?* Since the mid-1990s, organic support payments, like other agri-environmental payments, have been calculated on the basis of income forgone and additional costs incurred. For ongoing maintenance payments, the basis for these has normally been in comparison to conventional farming, as the choice to be organic is voluntary and farms can revert to non-organic status at any time. As part of this calculation, the EU Commission has required that premium prices for organic food are included in the calculation, potentially creating large differences between maintenance and conversion payments, with the latter not including premium prices as products cannot be sold as organic, and maintenance



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payments. As argued in this report, there is little evidence that the costs of developing and utilizing organic market channels are considered in these calculations, and not all producers succeed in gaining access to organic premium prices. It can be argued that premium prices and the market benefits of certification reflect the entrepreneurial activities of farmers in response to consumer demand and should therefore not be attributed to conversion to or maintenance of organic land management.

- *Does the application of the income forgone principle for calculating payments reflect actual costs?* Payments generally do not reflect the full costs of conversion, in particular the lack of access to organic premium prices during the two conversion years, possibly longer in the case of permanent crops, or for livestock on farms adopting a staged conversion. Even if the income forgone calculations are accurate, intervention rates below 100% leave producers carrying at least some of the costs. As this is potentially a significant barrier to uptake, might a better solution be to reduce the length of the period before full organic prices can be realized, while recognizing that the actual process of conversion is longer by maintaining longer-term support agreements?
- Can a more results-based, differentiated approach be developed to reward the environmental benefits generated by organic farming? In most countries, organic maintenance payments are paid at a flat rate, irrespective of the environmental benefits delivered by individual farmers. Sanders and Heß (2019) have shown that, although on average organic farmers deliver more environmental outputs, there is a wide range of performance among organic farmers. A more targeted and differentiated approach to payments could enable the best performers to be rewarded accordingly, consistent with the public money for public goods maxim. A research project assessing how this might work has recently been completed at the Thünen Institute (Sanders & Lampkin, 2023) ³¹.

This report has reviewed some of the key aspects of organic farming and aquaculture support in the European Union and identified a series of open questions that might benefit from further research and debate. There remains substantial scope for improvement in the design and implementation of organic support, which will be needed if the ambitions of the EU Commission and Member States are to be realized while at the same time ensuring the delivery of environmental, food security and public health goals. For aquaculture, the combination of uncertainty with respect to policy commitments, financial and market challenges and input availability constraints are currently hampering the growth of that organic sector in Europe. The further work planned in the OrganicTargets4EU project will assess many of the questions in more detail, leading to clear recommendations for the further development of organic farming policy, in particular for the next phase of CAP Reform from 2028.

³¹ <https://www.thuenen.de/en/institutes/farm-economics/projects/remuneration-for-the-environmental-benefits-of-organic-farming>, accessed 24.01.24



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9. Annexes

The data and information in the tables in these Annexes are our own compilation, sourced from Lampkin and Sanders (2022), national CAP Strategic Plans, and national/regional organic action plans as listed in the main report (pages 26 and 27).

Unless otherwise indicated, for 2019 payment rate data in Tables 9.1a-d and 9.2a-d, average EUR exchange rates for 2019 were used to convert from national currencies where required. For 2023, EUR values as stated in CSPs used. For countries outside the Eurozone, some differences may be due to exchange rate differences.

9.1. Comparison of planned (from 2023) and previous (2019) maintenance payments

Table 9.1a: Comparison of planned (from 2023) and previous (2019) maintenance payments in AT, BE, BG, CY, CZ, DE and DK

Country	P	Grassland	Arable	Vegetables, herbs	Protected cropping	Orchards, fruits, hops	Vineyards	Olives	
Austria (AT)	2023 (range, €/ha)	2	70 ^a , 215 ^c	205 ^c -325 ^d	405, 355 ^e	405	500 ^g , 700	700	na
	2019 (range, €/ha)	2	70 ^a , 225	70 ^b -230	450, 570 ^e	700, 1000 ^f	700	700	na
	Change (%)	-	0, -4	-11	-10, -38 ^e	-42	0	0	na
Belgium (BE)	2023 (range, €/ha)	1 ^h /2	118 ^h , 215 ⁱ	118 ^h , 240 ^{ij} , 435 ⁱ	118 ^h , 435 ⁱ , 4000 ^{il}	118 ^h , 435 ⁱ , 4000 ^{il}	118 ^h , 960 ⁱ	na	na
	2019 (range, €/ha)	2	120 ^h , 200 ⁱ	240 ^{h,ij} , 400 ^{i,k}	400 ^h , 900 ⁱ	400 ^h , 900 ⁱ	210 ^h , 900 ⁱ	na	na
	Change (%)	-	-1 ^h , 7 ⁱ	-55 ^h , 0 ⁱ	-70 ^h , -52 ⁱ , 344 ^{il}	-70 ^h , -52 ⁱ , 344 ^{il}	-44 ^h , 7 ⁱ	na	na
Bulgaria (BG)	2023 (range, €/ha)	1 ^m /2	358 ^m	557 ⁿ	557 ⁿ	557 ⁿ	557 ⁿ	557 ⁿ	557 ⁿ
	2019 (range, €/ha)	2	128-218 ^o	166, 168	399, 405	399	557	557	557
	Change (%)	-	74	232	40	40	0	0	0
Cyprus (CY)	2023 (range, €/ha)	2	410 ^p	410 ^p	1200	1200	750 ^q , 1200	1200	1200
	2019 (range, €/ha)	2	450	380	600	600	750 ^q , 900	900	750
	Change (%)	-	-9	8	100	100	0-33	33	60
Czechia (CZ)	2023 (range, €/ha)	2	100	120 ^r , 239	638	638	510 ^t , 850	847 ^u	na
	2019 (range, €/ha)	2	83	69 ^r , 133	466, 583 ^s	466	417 ^t , 779	845 ^u	na
	Change (%)	-	20	74 ^r , 79	37, 13 ^s	37	22 ^t , 9	0	na
Germany (DE)	2023 (range, €/ha)	2	190-284 ^v	220-314 ^v	375-680 ^v	375-4210 ^w	850-1060 ^v	850+	na
	2019 (range, €/ha)	2	189-273 ^v	189-273 ^v	300-550 ^v	300-3800 ^w	665-975 ^v	675-2855 ^x	na
	Change (%)	-	~0	~15	~25	~25, 11 ^w	~10-25	~25	na
Denmark (DK)	2023 (range, €/ha)	1	117 ^y , 204 ^z	117 ^y , 204 ^z	117 ^y , 204 ^z	117 ^y , 204 ^z	654 ^y , 741 ^z	na	na
	2019 (range, €/ha)	2	116 ^y , 183 ^z	116 ^y , 183 ^z	116 ^y , 183 ^z	116 ^y , 183 ^z	652 ^y , 719 ^z	na	na
	Change (%)	-	1, 12	1, 12	1, 12	1, 12	0, 3	na	na

P: Pillar (funding); na: not applicable; see next page for further footnotes



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Footnotes for Table 9.1a

- a. (AT) Stocking rates <0.5 LU/ha
- b. (AT) Lower rate for fodder crops and fallow if >25 % of arable area
- c. (AT) Biodiversity supplements available including: 300 €/ha for biodiversity land if over 7 % of arable area (100 €/ha for grassland); 70 €/ha for biodiversity on high quality arable land (50 €/ha for high quality grassland); 300 €/ha for new biodiversity areas sown with regional seed mixtures; 50 €/ha for at least one biodiversity parcel for each 3 ha arable or grassland ; 400 €/ha for mowing of steep slopes (>50% gradient)
- d. (AT) Supplements to basic rate for specified crops including 60 €/ha for grass/legume mixtures; 120 €/ha for grain legumes; 80 €/ha for crucifers; 50€/ha for sunflowers; 120-250 €/ha for rare, regionally valuable crops
- e. (AT) herbs and flowers
- f. (AT) integrating beneficial insects
- g. (AT) nuts
- h. (BE) Vlaanderen (BE-VLA)
- i. (BE) Wallonie (BE-WAL)
- j. (BE-WAL) fodder crops
- k. (BE-WAL) smaller areas: arable < 60ha, horticulture <3ha
- l. (BE-WAL) diversified market gardens <3 ha
- m. (BG) P1 Ecoscheme for organic livestock
- n. (BG) P2 schemes for organic crops and bees (bee payments not reported here)
- o. (BG) rate varies depending on category and density of livestock
- p. (CY) annual dryland and perennial fodder crops - additional payment for organic livestock average 129€/ha
- q. (CY) non-irrigated tree crops
- r. (CZ) rotational grass/forage crops
- s. (CZ) strawberries
- t. (CZ) extensive orchards
- u. (CZ) includes hops
- v. (DE) primarily regional variations
- w. (DE) untypically high rate for protected cropping in Nordrhein-Westfalen
- x. (DE) untypically high rate for vines on steep slopes in Rheinland-Pfalz
- y. (DK) higher intensity - max 100kg N/ha inputs permitted,
- z. (DK) lower intensity - max 60kg N/ha inputs permitted

Sources: 2019 Lampkin and Sanders, 2022; 2023 own compilation from CAP Strategic Plans

Table 9.1b: Comparison of planned (from 2023) and previous (2019) maintenance payments in EE, ES, FI, FR, GR, HR and HU

Country	P	Grassland	Arable	Vegetables, herbs	Protected cropping	Orchards, fruits, hops	Vineyards	Olives	
Estonia (EE)	2023 (range, €/ha)	1/2	25-160 ^a	132	300 ^b , 800 ^c	800 ^c	300	na	na
	2019 (range, €/ha)	2	25-160 ^a	125	210 ^b , 600 ^c	600 ^c	300	na	na
	Change (%)	-	0	6	43, 33 ^c	33 ^c	0	na	na
Spain (ES)	2023 (range, €/ha)	2	55-277 ^d	81-400 ^d	124-905 ^d	406-1530 ^d	110-900 ^d	129-916 ^d	153-364 ^d
	2019 (range, €/ha)	2	41-450 ^d	30-853 ^d	41-923 ^d	480-1561 ^d	60-900 ^d	60-900 ^d	60-534 ^d
	Change (%)	-	<0	<0	<0	<0	~0	~0	<0
Finland (FI)	2023 (range, €/ha)	2	45, 356 ^e	260	650	650	650	na	na
	2019 (range, €/ha)	2	294 ^e	160	600	600	600	na	na
	Change (%)	-	21 ^e	63	8	8	8	na	na
France (FR)	2023 (range, €/ha)	1	110	110	110	110	110	110	na
	2019 (range, €/ha)	-	0 ^f	0 ^f	0 ^f	0 ^f	0 ^f	0 ^f	na
	Change (%)	-	-	-	-	-	-	-	na
Greece (GR)	2023 (range, €/ha)	1	247 ^g -347 ^h	120 ⁱ -644 ^j	635-1295 ^k	635-1140 ^l	334 ^m -1266 ⁿ	657-1440 ^p	505
	2019 (range, €/ha)	2	260 ^g -383 ^h	70 ⁱ -550 ^j	550	550	225 ^m -766 ^o	586-850 ^p	455
	Change (%)	-	-10 ^h - -5 ^g	17 ⁱ -71 ⁱ	15	15	23 ^o -48 ^m	12-69 ^p	11
Croatia (HR)	2023 (range, €/ha)	2	157 ^r	235 ^r	480 ^r	480 ^r	516 ^p , 1074 ^r	754 ^r	754 ^r
	2019 (range, €/ha)	2	258	290	481	481	723	723	723
	Change (%)	-	-39	-19	0	0	49	4	4
Hungary (HU)	2023 (range, €/ha)	2	204	349	664	664	967, 1136 ^s	1097	na
	2019 (range, €/ha)	2	147	172	516	516	568, 802 ^s	674	na
	Change (%)	-	38	103	29	29	70, 42 ^s	63	na

P: Pillar (funding); na: not applicable; see next page for further footnotes



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Footnotes for Table 9.1b

- a. (EE) Organic livestock payments are Pillar 2 funded and made per hectare based on the number of livestock kept, converted to LU using specific (non-standard) conversion factors at a rate of 85 €/LU and divided by the total number of organic hectares in the agreement. For example, a typical dairy farm might expect 160 €/ha, a pig farm 450 €/ha, but the amounts will differ on each farm.
- b. (EE) potatoes and herbs
- c. (EE) vegetables for human consumption
- d. (ES) primarily regional variations
- e. (FI) with livestock
- f. (FR) maintenance payments were initially available at the start of the 2014-2020 period, but were discontinued midway; only values for mainland France analysed; regional top-ups may also be available
- g. (GR) sheep and goats
- h. (GR) dairy cattle
- i. (GR) winter cereals
- j. (GR) fodder maize
- k. (GR) aromatic herbs
- l. (GR) tomatoes, aubergines etc.
- m. (GR) citrus
- n. (GR) prickly pears
- o. (GR) stone fruit
- p. (GR) table grapes
- q. (HR) walnuts and hazelnuts
- r. (HR) all land uses also get 60 €/ha for first 5 ha and can be combined with the ecological cultivation measure for an additional 65 €/ha
- s. (HU) apples

Sources: 2019 Lampkin and Sanders, 2022; 2023 own compilation from CAP Strategic Plans

Table 9.1c: Comparison of planned (from 2023) and previous (2019) maintenance payments in IE, IT, LT, LU, LV, MT and NL

Country	P	Grassland	Arable	Vegetables, herbs	Protected cropping	Orchards, fruits, hops	Vineyards	Olives	
Ireland (IE)	2023 (range, €/ha)	2	30 ^a , 250 ^c , 300 ^d	30 ^a , 270	30 ^a , 600	600	30 ^a , 600	na	na
	2019 (range, €/ha)	2	30 ^b , 170	30 ^b , 170	30 ^b , 200	200	30 ^b , 200	na	na
	Change (%)	-	76 ^d	59	200	200	200	na	na
Italy (IT)	2023 (range, €/ha)	2	15-450 ^{e,f}	53-600 ^e	173 ^g -1000 ^e	950	220 ^h -1068 ^e	540-1190 ^e	310-810 ^e
	2019 (range, €/ha)	2	12-450 ^{e,f}	90-600 ^e	270 ^g -1000 ^e	480-1200	102 ^h -900 ^e	450-900 ^e	330-810 ^e
	Change (%)	-	~0	~0	~0	~-20	~20	~25	~0
Lithuania (LT)	2023 (range, €/ha)	1/2	59 ⁱ ,176	232 ^j , 273	487 ^k , 525	525	518	na	na
	2019 (range, €/ha)	2	176	218 ^j , 283	487 ^k , 525	525	518	na	na
	Change (%)	-	0	5 ^j , -5	0	0	0	na	na
Luxembourg (LU)	2023 (range, €/ha)	2	300	300	550 ^l , 1150 ^m	1500	1150 ^m , 1500	1150 ^m , 1500	na
	2019 (range, €/ha)	2	220	250	350 ^l , 600	800	800	950	na
	Change (%)	-	36	20	57 ^l , 92	88	44 ^m , 88	21 ^m , 58	na
Latvia (LV)	2023 (range, €/ha)	1 ^p /2	43-138 ⁿ	46 ^o , 97	518	518	518	na	na
	2019 (range, €/ha)	2	97	117	397-399	399	485	na	na
	Change (%)	-	-56-+42	-55, -17	30	30	7	na	na
Malta (MT)	2023 (range, €/ha)		3614 ^q	3614 ^q	3614 ^q	3614 ^q	3614 ^q	3614 ^p	3614 ^p
	2019 (range, €/ha)	2	555	555	555	555	555	555	555
	Change (%)	-	550	550	550	550	550	550	550
Netherlands (NL)	2023 (range, €/ha)	1	200	200	200	200	200	200	na
	2019 (range, €/ha)	-	0	0	0	0	0	0	na
	Change (%)	-	-	-	-	-	-	-	na

P: Pillar (funding); na: not applicable; see next page for further footnotes



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Footnotes for Table 9.1c

- a. (IE) areas over 70 ha
- b. (IE) areas over 60 ha
- c. (IE) other livestock
- d. (IE) dairy
- e. (IT) range reflects regional variations
- f. (IT) range also reflects livestock types and management intensity
- g. (IT) lower values typically for medicinal and aromatic herbs
- h. (IT) lower values typically for nuts
- i. (LT) reseeded
- j. (LT) fodder crops
- k. (LT) herbs
- l. (LU) potatoes
- m. (LU) open field market gardening, non-productive fruit growing and viticulture
- n. (LV) grassland with at least 0.4 LU/ha, increased to 138€ if at least 1.0 LU/ha dairy or 93€ if 1 LU/ha other livestock
- o. (LV) grass/legume mixtures without livestock
- p. (LV) An Eco-scheme 'Agroecological practices for Organic Farming' pays an additional 56€/ha if the whole farm is included in an organic control system and additional practices are undertaken.
- q. (MT) justified in terms of very small, horticulture focused units and need to incentivise farmers to consider organic option (2027 target is 500ha)

Sources: 2019 Lampkin and Sanders, 2022; 2023 own compilation from CAP Strategic Plans

Table 9.1d: Comparison of planned (from 2023) and previous (2019) maintenance payments in PL, PT, RO, SE, SI, SK and CH

Country	P	Grassland	Arable	Vegetables, herbs	Protected cropping	Orchards, fruits, hops	Vineyards	Olives	
Poland (PL) ^a	2023 (range, €/ha) ^g	2	234 ^b	338 ^c , 353	417 ^d , 537	na	298 ^e , 440, 497 ^f	na	Na
	2019 (range, €/ha)	2	120	148 ^c , 209	294, 297 ^d	na	149 ^e , 337	na	Na
	Change (%)	-	196	229 ^c , 168	140 ^d , 182	na	200 ^e , 131, 148 ^f	na	Na
Portugal (PT)	2023 (range, €/ha) ^h	1	97+49€/LU ⁱ	89, 430 ^j , 649 ^k	610	610	290 ^l , 600 ^l , 825, 927 ^{l,m}	570 ^m	290, 600 ^{j,m}
	2019 (range, €/ha)	2	170	80, 380 ^j , 530 ^k	600	600	250 ^l , 536 ^l , 760, 900 ^{l,m}	515 ^m	250, 536 ^{j,m}
	Change (%)	-	86	111, 113 ^j , 112 ^k	102	102	103-116	111	116. 112
Romania (RO)	2023 (range, €/ha)	2	73 ⁿ , 129	218	350 ^o , 431	431	442	479	na
	2019 (range, €/ha)	2	73 ⁿ , 129	218	350 ^o , 431	431	442	479	na
	Change (%)	-	0	0	0	0	0	0	na
Sweden (SE)	2023 (range, €/ha)	1	177 ^p	147 ^q	492	492	737	na	na
	2019 (range, €/ha)	2	76 ^r , 151 ^p	142 ^q	472	472	708	na	na
	Change (%)	-	0 ^r , 17 ^p	4	4	4	4	na	na
Slovenia (SI)	2023 (range, €/ha)	2	159	607, 785 ^w	785 ^s , 1021	1131, 1200 ^x	258 ^t , 796 ^u , 885 ^v	888	885 ^v
	2019 (range, €/ha)	2	156	326	600	600	189 ^t , 900	693	677
	Change (%)	-	2	86	31 ^s , 70	89	37 ^t , -2 ^v	28	33
Slovakia (SK)	2023 (range, €/ha)	2	96	170	417 ^y , 735 ^z , 795, 1111 ^{aa}	795	497-904 ^{bb}	468 ^{cc} , 762	na
	2019 (range, €/ha)	2	96	153	290 ^z , 529 ^{dd}	529	330-671 ^{ee}	420 ^{cc} , 671	na
	Change (%)	-	0	11	153 ^z , 50, 110 ^{aa}	50	35-51	11 ^{cc} , 14	na
Switzerland (CH)	2023 (CHF/ha) ^{ff}	CH	200	1200	1600	1600	1600	1600	na
	2019 (CHF/ha) ^{ff}	CH	200	1200	1600	1600	1600	1600	na
	Change (%)	-	0	0	0	0	0	0	na

P: Pillar (funding); na: not applicable; see next page for further footnotes



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Footnotes for Table 9.1d

- a. (PL) PLZ values for 2019 and 2023 converted at 4.4553 PLZ/EUR rate on 14.06.23
- b. (PL) permanent grass
- c. (PL) rotational grass
- d. (PL) herbs
- e. (PL) extensive orchards
- f. (PL) berries
- g. (PL) smallholdings 368, sustainability premium 129
- h. (PT) rates shown are subject to degression for larger land areas (different areas for each land use, areas shown here are for most extensive land uses): Band 1: 100% <20 ha, Band 2: 80% 20-40 ha, Band 3: 50% 40-100 ha, Band 4: 20% < 100 ha, the land area limits for most intensive land use are 25% of the values shown
- i. (PT) additional payment for livestock units kept, area degression rates apply^h
- j. (PT) irrigated crops
- k. (PT) rice
- l. (PT) dry fruits
- m. (PT) minimum planting densities apply for perennial crops
- n. (RO) grassland with agrienvironmental commitment
- o. (RO) medicinal and aromatic herbs
- p. (SE) not for permanent grassland – payment is for livestock on arable land, assuming 1 ha per LU
- q. (SE) excluding rotational grassland
- r. (SE) only if livestock present, with 1 LU permitting payment on up to 2 ha permanent grass, effectively 151€/LU
- s. (SI) nurseries, seed production (all types)
- t. (SI) grassland orchards
- u. (SI) hops
- v. (SI) intensive orchards: olives > 150 trees/ha, walnuts, chestnuts > 100 trees/ha, other fruit species (also mixed) > 200 trees/ha
- w. (SI) seed crops
- x. (SI) nurseries
- y. (SK) medicinal and aromatic herbs
- z. (SK) potatoes
- aa. (SK) strawberries
- bb. (SK) orchards high density production 904, high density establishment 554, other fruits 814, mixed orchards 497
- cc. (SK) establishment
- dd. (SK) including berries
- ee. (SK) orchards high density production 671, high density establishment 420, other orchards 330
- ff. (CH) CHF/EUR exchange rate ca. 1:1 in 2023

Sources: 2019 Lampkin and Sanders, 2022; 2023 own compilation from CAP Strategic Plans

9.2. Comparison of planned (from 2023) and previous (2019) conversion payments

Table 9.2a: Comparison of planned (from 2023) and previous (2019) conversion payments in AT, BE, BG, CY, CZ, DE and DK

Country		P	Grassland	Arable	Vegetables, herbs	Protected cropping	Orchards, fruits, hops	Vineyards	Olives
Austria (AT)	2023 (range, €/ha)	2	70 ^a , 215 ^c	205 ^c -325 ^d	405, 355 ^e	405	500 ^g , 700	700	na
	2019 (range, €/ha)	2	70 ^a , 225	70 ^b -230	450, 570 ^e	700, 1000 ^f	700	700	na
	Change (%)	-	0, -4	-11	-10, -38 ^e	-42	0	0	na
Belgium (BE)	2023 (range, €/ha)	2	365 ⁱ , 390 ^h	390 ^{ij} , 900 ^h	1700 ^h , 4000 ^l	1700 ^h , 4000 ^l	1050 ^m , 1700 ^h	na	na
	2019 (range, €/ha)	2	270 ⁱ , 350 ⁱ	390 ^{ij} , 550 ^{ik}	550 ^l , 1050 ^l	550 ^l , 1050 ^l	390 ^m , 1050 ^m	na	na
	Change (%)	-	35 ⁱ , 30 ^h	0 ⁱ , 88 ^h	100 ^h , 281 ^l	29 ^h , 281 ^l	0 ^m , 29 ^h	na	na
Bulgaria (BG)	2023 (range, €/ha)	1 ⁿ /2	358 ⁿ	693 ^o	693 ^o	693 ^o	693 ^o	693 ^o	693 ^o
	2019 (range, €/ha)	2	128-358 ^p	284	515 ^q , 575	575	736 ^r	736	736
	Change (%)	-	0	144	21	21	-6	-6	-6
Cyprus (CY)	2023 (range, €/ha)	2	410 ^s	410 ^s	1200	1200	750 ^t , 1200	1200	1200
	2019 (range, €/ha)	2	450	380	600	600	750 ^t , 900	900	750
	Change (%)	-	-9	8	100	100	0-33	33	60
Czechia (CZ)	2023 (range, €/ha)	2	106	137 ^v , 323	660	660	536 ^x , 896	900 ^y	na
	2019 (range, €/ha)	2	84 ^u	79 ^v , 265	536, 669 ^w	536	419 ^x , 825	900	na
	Change (%)	-	26	73 ^v , 22	23, -1 ^w	23	28 ^x , 9	0	na
Germany (DE)	2023 (range, €/ha)	2	210-609 ^z	240-550 ^z	375-1500 ^z	375-6130 ^{aa}	850-2240 ^z	850+	na
	2019 (range, €/ha)	2	190-364 ^z	209-520 ^z	415-1440 ^z	415-3800 ^{aa}	665-1625 ^z	750-2855 ^{bb}	na
	Change (%)	-	~30	~10	~0	~0 ^z , 60 ^{aa}	~30	~33	na
Denmark (DK)	2023 (range, €/ha)	1	332 ^{cc} , 419 ^{dd}	332 ^{cc} , 419 ^{dd}	332 ^{cc} , 419 ^{dd}	332 ^{cc} , 419 ^{dd}	869 ^{cc} , 965 ^{dd}	na	na
	2019 (range, €/ha)	2	277 ^{cc} , 344 ^{dd}	277 ^{cc} , 344 ^{dd}	277 ^{cc} , 344 ^{dd}	277 ^{cc} , 344 ^{dd}	813 ^{cc} , 880 ^{dd}	na	na
	Change (%)	-	20 ^{cc} , 22 ^{dd}	20 ^{cc} , 22 ^{dd}	20 ^{cc} , 22 ^{dd}	20 ^{cc} , 22 ^{dd}	7 ^{cc} , 10 ^{dd}	na	na

P: Pillar (funding); na: not applicable; see next page for further footnotes



Deliverable D1.2

Assessment of agricultural and aquaculture policy responses to the organic F2F targets

Footnotes for Table 9.2a

- a. (AT) Stocking rates <0.5 LU/ha
- b. (AT) Lower rate for fodder crops and fallow if >25 % of arable area
- c. (AT) Biodiversity supplements available including: 300 €/ha for biodiversity land if over 7 % of arable area (100 €/ha for grassland); 70 €/ha for biodiversity on high quality arable land (50 €/ha for high quality grassland); 300 €/ha for new biodiversity areas sown with regional seed mixtures; 50 €/ha for at least one biodiversity parcel for each 3 ha arable or grassland ; 400 €/ha for mowing of steep slopes (>50% gradient)
- d. (AT) Supplements to basic rate for specified crops including 60 €/ha for grass/legume mixtures; 120 €/ha for grain legumes; 80 €/ha for crucifers; 50€/ha for sunflowers; 120-250 €/ha for rare, regionally valuable crops
- e. (AT) herbs and flowers
- f. (AT) integrating beneficial insects
- g. (AT) nuts
- h. (BE) Vlaanderen (BE-VLA)
- i. (BE-WAL) min 0.6 LU/ha; higher rate <60ha
- j. (BE-WAL) fodder crops
- k. (BE-WAL) higher rate arable < 60ha
- l. (BE-WAL) horticulture/diversified market gardens <3 ha
- m. (BE-WAL) higher rate >250 trees/ha, lower rate 50-250 trees/ha
- n. (BG) P1 Eco-scheme for organic livestock, as maintenance
- o. (BG) P2 schemes for organic crops average rate, may be differentiated by crop
- p. (BG) rate varies depending on category and density of livestock
- q. (BG) herbs, medicinal crops
- r. (BG) includes essential oil roses
- s. (CY) annual dryland and perennial fodder crops - additional payment for organic livestock average 129€/ha
- t. (CY) non-irrigated tree crops
- u. (CZ) as maintenance
- v. (CZ) rotational grass/forage crops
- w. (CZ) strawberries
- x. (CZ) extensive orchards
- y. (CZ) includes hops
- z. (DE) primarily regional variations
- aa. (DE) Untypically high rate for protected cropping in Nordrhein-Westfalen
- bb. (DE) Untypically high rate for vines on steep slopes in Rheinland-Pfalz
- cc. (DK) higher intensity - max 100kg N/ha inputs permitted, conversion suppl. €215
- dd. (DK) lower intensity - max 60kg N/ha inputs permitted, conversion suppl. €215

Sources: 2019 Lampkin and Sanders, 2022; 2023 own compilation from CAP Strategic Plans

Table 9.2b: Comparison of planned (from 2023) and previous (2019) conversion payments in EE, ES, FI, FR, GR, HR and HU

Country	P	Grassland	Arable	Vegetables, herbs	Protected cropping	Orchards, fruits, hops	Vineyards	Olives	
Estonia (EE)	2023 (range, €/ha)	1/2 ^a	27-160 ^a	146	330 ^b , 880 ^c	880 ^c	330	na	na
	2019 (range, €/ha)	2	27.5-93.5 ^a	137.5	231 ^b , 660 ^c	660 ^c	330	na	na
	Change (%)	-	0	6	43 ^b , 33 ^c	33	0	na	na
Spain (ES)	2023 (range, €/ha)	2	50-433 ^d	93-477 ^d	127-920 ^d	1150-1530 ^d	122-900 ^d	199-996 ^d	167-403 ^d
	2019 (range, €/ha)	2	45-450 ^d	81-894 ^d	128-648 ^d	600-1200 ^d	75-934 ^d	75-900 ^d	75-534 ^d
	Change (%)	-	~0	<0	~0-40	~30	~0-50	~0-100	~-20+100
Finland (FI)	2023 (range, €/ha)	2	45, 356 ^e	260	650	650	650	na	na
	2019 (range, €/ha)	2	294 ^e	160	600	600	600	na	na
	Change (%)	-	21 ^e	63	8	8	8	na	na
France (FR)	2023 (range, €/ha)	1 ^f /2	44 ^g , 130	350	350 ^h , 450	450	900	350	na
	2019 (range, €/ha)	-	44 ^g , 130	300	350 ^h , 450	450	130 ⁱ , 900	350	na
	Change (%)	-	0	17	0	0	0	0	na
Greece (GR)	2023 (range, €/ha)	2	232 ^j -350 ^k	216 ^l -882 ^q	848-1294 ⁿ	1957 ^o	447 ^p -951 ^r	856-873 ^s	692-712
	2019 (range, €/ha)	2	211 ⁱ -333 ^k	72 ^l -550 ^m	550	550	295 ^p -850 ^r	669-850 ^s	629
	Change (%)	-	5 ^k -10 ^j	20 ^m -200 ^l	54-135 ⁿ	256	52 ^p -12 ^r	3 ^s -28	11
Croatia (HR)	2023 (range, €/ha)	2	157 ^u	235 ^u	480 ^u	480 ^u	516 ^t , 1074 ^u	754 ^u	754 ^u
	2019 (range, €/ha)	2	310	348	577	577	868	868	868
	Change (%)	-	-49	-32	-17	-17	24	-13	-13
Hungary (HU)	2023 (range, €/ha)	2	204	458	1097	1097	1762, 1840 ^v	1132	na
	2019 (range, €/ha)	2	147	242	516	516	734, 1040 ^v	873	na
	Change (%)	-	39	89	113	113	140, 77 ^v	30	na

P: Pillar (funding); na: not applicable; see next page for further footnotes



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Assessment of agricultural and aquaculture policy responses to the organic F2F targets

Footnotes for Table 9.2b

- a. (EE) Organic livestock payments are Pillar 2 funded and made per hectare based on the number of livestock kept, converted to LU using specific (non-standard) conversion factors at a rate of 85 €/LU and divided by the total number of organic hectares in the agreement. For example, a typical dairy farm might expect 160 €/ha, a pig farm 450 €/ha, but the amounts will differ on each farm.
- b. (EE) potatoes and herbs
- c. (EE) vegetables for human consumption
- d. (ES) primarily regional variations, also crop type and irrigation/rainfed status
- e. (FI) with livestock
- f. (FR) values for P2 conversion scheme in mainland FR (HX); in addition, land qualifies for organic eco-scheme (€110/ha); regional top-ups may also be available
- g. (FR) rough grazing
- h. (FR) specified herbs
- i. (FR) chestnuts
- j. (GR) goats
- k. (GR) dairy cattle
- l. (GR) winter cereals
- m. (GR) fodder maize
- n. (GR) aromatic herbs
- o. (GR) tomatoes, aubergines etc.
- p. (GR) citrus
- q. (GR) lucerne, clover
- r. (GR) stone fruit
- s. (GR) table grapes
- t. (HR) walnuts and hazelnuts
- u. (HR) conversion as maintenance in 2023 only; all land uses also get 60 €/ha for first 5 ha and can be combined with the ecological cultivation measure for an additional 65 €/ha
- v. (HU) apples

Sources: 2019 Lampkin and Sanders, 2022; 2023 own compilation from CAP Strategic Plans

Table 9.2c: Comparison of planned (from 2023) and previous (2019) conversion payments in IE, IT, LT, LU, LV, MT and NL

Country	P	Grassland	Arable	Vegetables, herbs	Protected cropping	Orchards, fruits, hops	Vineyards	Olives	
Ireland (IE)	2023 (range, €/ha)	2	60 ^a , 300 ^c , 350 ^d	60 ^a , 320	60 ^a , 800	800	60 ^a , 800	na	na
	2019 (range, €/ha)	2	60 ^b , 220	60 ^b , 260	60 ^b , 300	300	60 ^b , 300	na	na
	Change (%)	-	0 ^a , 59 ^d	0 ^a , 23	0 ^a , 167	167	0 ^a , 167	na	na
Italy (IT)	2023 (range, €/ha)	2	13-864 ^{e,f,i}	53-750 ^e	192 ^g -1000 ^e	500-1000	113 ^h -1200 ^e	470-1190 ^e	310-900 ^e
	2019 (range, €/ha)	2	20-600 ^{e,f}	100-706 ^e	180 ^g -1200 ^e	480-1200	113 ^h -1200 ^e	506-1200 ^e	390-900 ^e
	Change (%)	-	~40	~10	~-15	~-15	~0	~0	~0
Lithuania (LT)	2023 (range, €/ha)	1	206	280	652	652	652	na	na
	2019 (range, €/ha)	2	182	238 ^j , 298	516 ^k , 525	534	534	na	na
	Change (%)	-	13	-6, 18 ^j	26 ^k , 24	22	22	na	na
Luxembourg (LU)	2023 (range, €/ha)	2	400	450	700 ^l , 2000 ^m	2500	2000 ^m , 2500	2000 ^m , 2500	na
	2019 (range, €/ha)	2	270	300	400 ^l , 850	1200	1200	1350	na
	Change (%)	-	48	50	75 ^l , 135	108	67 ^m , 108	48 ^m , 85	na
Latvia (LV)	2023 (range, €/ha)	1 ^p /2	43-138 ⁿ	46 ^o , 97	518	518	518	na	na
	2019 (range, €/ha)	2	97	117	397-399	399	485	na	na
	Change (%)	-	-56-+42	-55, -17	30	30	7	na	na
Malta (MT)	2023 (range, €/ha)	2	4378 ^q	4378 ^q	4378 ^q	4378 ^q	4378 ^q	4378 ^q	4378 ^q
	2019 (range, €/ha)	2	1209	1209	1209	1209	1209	1209	1209
	Change (%)	-	262	262	262	262	262	262	262
Netherlands (NL)	2023 (range, €/ha)	1 ^r	200	200	200	200	200	200	na
	2019 (range, €/ha)	-	0	0	0	0	0	0	na
	Change (%)	-	-	-	-	-	-	-	na

P: Pillar (funding); na: not applicable; see next page for further footnotes



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Footnotes for Table 9.2c

- a. (IE) areas over 70 ha
- b. (IE) areas over 60 ha
- c. (IE) other livestock
- d. (IE) dairy
- e. (IT) range reflects regional variations
- f. (IT) range also reflects livestock types and management intensity
- g. (IT) lower values typically for medicinal and aromatic herbs
- h. (IT) lower values typically for nuts
- i. (IT) Sardinia includes a payment for organic aquaculture
- j. (LT) fodder crops
- k. (LT) herbs
- l. (LU) potatoes
- m. (LU) open field market gardening, non-productive fruit growing and viticulture
- n. (LV) grassland with at least 0.4 LU/ha, increased to 138€ if at least 1.0 LU/ha dairy or 93€ if 1 LU/ha other livestock
- o. (LV) grass/legume mixtures without livestock
- p. (LV) An Eco-scheme 'Agroecological practices for Organic Farming' pays an additional 56€/ha if the whole farm is included in an organic control system and additional practices are undertaken.
- q. (MT) justified in terms of very small, horticulture focused units and need to incentivise farmers to consider organic option (2027 target is 500ha)
- r. (NL) Some provincial conversion support schemes are available in addition

Sources: 2019 Lampkin and Sanders, 2022; 2023 own compilation from CAP Strategic Plans

Table 9.2d: Comparison of planned (from 2023) and previous (2019) conversion payments in PL, PT, RO, SE, SI, SK and CH

Country	P	Grassland	Arable	Vegetables, herbs	Protected cropping	Orchards, fruits, hops	Vineyards	Olives	
Poland (PL) ^a	2023 (range, €/ha) ^g	2	229 ^b	359 ^c , 372	407 ^d , 663	na	291 ^e , 548 ^f , 681	na	na
	2019 (range, €/ha)	2	125 ^b	215 ^c , 265	308 ^d , 362	na	184 ^e , 438	na	na
	Change (%)	-	83	67 ^c , 40	32 ^d , 83	na	58 ^e , 25, 55 ^f	na	na
Portugal (PT)	2023 (range, €/ha) ^h	1	102+50€/LU ⁱ	98, 475 ^j , 684 ^k	640	640	910 ^l , 975 ^{l,m}	630 ^m	320, 656 ^{l,m}
	2019 (range, €/ha) ^h	2	204	96, 456 ^j , 600 ^k	600	600	900 ^{l,j,m}	618 ^m	300, 643 ^{l,m}
	Change (%)	-	0	2, 4 ^j , 14 ^k	7	7	103-116	2	2 ^{j,m} , 7
Romania (RO)	2023 (range, €/ha)	2	39 ⁿ , 143	293	365 ^o , 500	500	620	530	na
	2019 (range, €/ha)	2	39 ⁿ , 143	293	365 ^o , 500	500	620	530	na
	Change (%)	-	0	0	0	0	0	0	na
Sweden (SE)	2023 (range, €/ha)	1	177 ^p	147 ^q	492	492	737	na	na
	2019 (range, €/ha)	2	76 ^r , 151 ^p	142 ^q	472	472	708	na	na
	Change (%)	-	0 ^r , 17 ^p	4	4	4	4	na	na
Slovenia (SI)	2023 (range, €/ha)	2	159	607, 785 ^w	785 ^s , 1021	1131, 1200 ^x	258 ^t , 796 ^u , 885 ^v	888	885 ^v
	2019 (range, €/ha)	2	273	312	600, 800 ^w	600, 800 ^w	291 ^t , 900	900	900
	Change (%)	-	-42	95	31 ^s , 89	89, 50 ^x	37 ^t , -2 ^v	-2	-2
Slovakia (SK)	2023 (range, €/ha)	2	96	170	417 ^y , 735 ^z , 795, 1111 ^{aa}	795	497-904 ^{bb}	468 ^{cc} , 762	na
	2019 (range, €/ha)	2	96	153	290 ^z , 529 ^{dd}	529	330-671 ^{ee}	420 ^{cc} , 671	na
	Change (%)	-	0	11	153 ^z , 50, 110 ^{aa}	50	35-51	11 ^{cc} , 14	na
Switzerland (CH)	2023 (CHF/ha) ^{gg}	CH	200 ^{ff}	1200 ^{ff}	1600 ^{ff}	1600 ^{ff}	1600 ^{ff}	1600 ^{ff}	na
	2019 (CHF/ha) ^{gg}	CH	200 ^{ff}	1200 ^{ff}	1600 ^{ff}	1600 ^{ff}	1600 ^{ff}	1600 ^{ff}	na
	Change (%)	-	0	0	0	0	0	0	na

P: Pillar (funding); na: not applicable; see next page for further footnotes



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Assessment of agricultural and aquaculture policy responses to the organic F2F targets

Footnotes for Table 9.2d

- a. (PL) PLZ values for 2019 and 2023 converted at 4.4553 PLZ/EUR rate on 14.06.23
- b. (PL) permanent grass, as maintenance
- c. (PL) rotational grass
- d. (PL) herbs
- e. (PL) extensive orchards
- f. (PL) berries
- g. (PL) smallholdings 388, sustainability premium 129
- h. (PT) rates shown are subject to degression for larger land areas (different areas for each land use, areas shown here are for most extensive land uses): Band 1: 100% <20 ha, Band 2: 80% 20-40 ha, Band 3: 50% 40-10 ha, Band 4: 20% < 100 ha, the land area limits for most intensive land use are 25% of the values shown
- i. (PT) additional payment for livestock kept, area degression rates apply^h
- j. (PT) irrigated crops
- k. (PT) rice
- l. (PT) dry fruits
- m. (PT) minimum planting densities apply for perennial crops
- n. (RO) grassland with agrienvironmental commitment
- o. (RO) medicinal and aromatic herbs
- p. (SE) not for permanent grassland – payment is for livestock on arable land, assuming 1 ha per LU
- q. (SE) excluding rotational grassland
- r. (SE) only if livestock present, with 1 LU permitting payment on up to 2 ha permanent grass, effectively 151€/LU
- s. (SI) nurseries, seed production (all types)
- t. (SI) grassland orchards
- u. (SI) hops
- v. (SI) intensive orchards: olives > 150 trees/ha, walnuts, chestnuts > 100 trees/ha, other fruit species (also mixed) > 200 trees/ha
- w. (SI) seed crops
- x. (SI) nurseries
- y. (SK) medicinal and aromatic herbs
- z. (SK) potatoes
- aa. (SK) strawberries
- bb. (SK) orchards high density production 904, high density establishment 554, other fruits 814, mixed orchards 497
- cc. (SK) establishment
- dd. (SK) including berries
- ee. (SK) orchards high density production 671, high density establishment 420, other orchards 330
- ff. (CH) Some Cantonal conversion support schemes are available in addition
- gg. (CH) CHF/EUR exchange rate ca. 1:1 in 2023

Sources: 2019 Lampkin and Sanders, 2022; 2023 own compilation from CAP Strategic Plans



Deliverable D1.2
Assessment of agricultural and aquaculture policy responses to the organic F2F targets

9.3. Comparison of current/planned and previous production and market-related action plan measures

Table 9.3a: Comparison of current/planned and previous production and market-related national organic action plan measures in AT and BE-VLA

Country	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
AT	C	a: 150 M€pa by 2027	b: 5% higher grants, higher priority (bio calls), direct marketing startup support, more focus on environment and animal welfare aspects	c: supply chain co-operation support: development of short supply chains and local markets	d: 22% of canteen food by 2023, 55% by 2030, higher share of school milk, fruit, recognition in public good framework	e: extend role of organic products in tourism via bio-regions, holidays on organic farms gastronomy, certification of restaurants; advisory support; promotion.	f: increased focus on exports, participation in trade fairs, marketing campaigns	g: strengthen profile of AT and EU organic logos; support use of producer brands in retail sector	h: participation in quality programmes with 5-year grants for organic certification, especially for conversion
	P	n: 150 M€pa, 37% of AECM, +25% of ANC	o: 5% higher grants, higher priority	p: group actions linked to other measures in AP	q	r	s	t: AMA organic logo	u
BE-VLA	C	a: more support (CAP)	b: focus on local products to reduce imports	c: Bio-clusters; engage more business in sector; increase transparency and co-operation in supply chains	d: increase public procurement to 5%	e: more information available, including potential in tourism	f: expand export opportunities	g	h: strong control system and implementation of regulations; grants for certification costs
	P	n: yes (CAP)	o: more by-product value added	p: Bio-clusters to help balance supply and demand	q: more information available	r: more information available, including potential in tourism	s	t	u: quality standards for processors; EU organic regulation

Table 9.3b: Comparison of current/planned and previous production and market-related national organic action plan measures in BE-WAL and BG

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
BE-WAL	C	a: further financial support, develop new support in water catchments	b: supply chain support initiatives using various support mechanisms	c: financial, advisory and facilitation support for groups; co-operation with extra-regional partners	d: engagement with school milk and fruit programmes	e: financial support for organic restaurants, consumers, in particular certification	f: support presence of organic in trade fairs; development of marketing tools	g	h: checklists for self-assessment; improvements in quality systems and certification for processing, also aspects not covered by EU regulations
	P	n: continue CAP support	o: funded strategy for marketing local products	p: strengthen supply chains, prod. groups; restructure organic bodies and networks	q: develop public procurement, including training	r	s	t	u: harmonization of certification terms used by control bodies
BG	Cp	a: increase number and area of organic farms; more organic products from them, incl. bees	b: processing of raw materials, adding value to BG products; investment in new plantations and livestock	c: strengthen local, small-scale processing, short supply chains; box-scheme pilot projects	d: seek cross-ministry agreements for schools, hospitals, etc.; increase in school milk, fruit programmes	e	f: promotion of products in export markets through participation in trade fairs	g	h: animal welfare; electronic standards documentation; quality standards for processed products; financial aid for aqua-culture certification; blockchain trials
	P	n: increase farms, products, seeds, transpl.; priority for young farmers; easier access to bank credits; priority access to state land	o: aid for livestock housing, processing, marketing; priority for traditional and geographical origin products	p: development of producer groups	q: 30% of products in schools, kindergartens, health institutions to be organic; 10% of public procurement to be organic	r: link organic market and tourism prioritizing organic producer groups	s: develop export markets; promote BG brands; trade fair participation; diplomatic engagement; foreign invest. in BG projects	t: national logo; related legal protections, information to tackle fraud	u: legislation; expert group for auditing certification system; efficient inspection and certification system; rules for foreign control bodies operating in BG; GMO-free zones;

Table 9.3c: Comparison of current/planned and previous production and market-related national organic action plan measures in CY and CZ (C)

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
CY	C	a: CAP and RDP support; encourage organic aquaculture	b: strengthening local, small-scale processing; promoting short supply chains; to provide environmental and social benefits; renewable energy projects	c: support for supply chain organization; strengthening the position of producers through cooperation; conference for stakeholders twice a year; establishment of bioregions	d: increasing use of green public procurement and support for canteens selling organic products; inclusion of organic products in criteria for public procurement; awareness-raising linked to climate; inclusion of more organic products in school milk and fruit programmes; establish stakeholder committee	e	f: promotion of organic products in third country markets; participation in trade fairs; org. products on gov't website; update commercial attachés in CY embassies	g	h: support for quality systems; strengthen cooperation between competent authority and control bodies; tighter controls on imports and non-compliances, including testing; investigate blockchain technology for improving traceability
CZ	C	a: maintain support; improve financial viability of organic, especially arable; increase permanent crops by 10%; increase organic in environmentally sensitive areas; regular review of support payments and budgets	b: improve processing capacity for domestic products	c: increase organic market share and proportion of domestic products; increase co-operation in supply chains; improve vertical linkages; producer organization support	d: include organic (5%) in public catering; increase organic in school milk and fruit programmes; information to support uptake; engagement with other government departments; support training and information	e: support training and information	f	g: introduction of national organic logo for domestic products	h



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Table 9.3d: Comparison of current/planned and previous production and market-related national organic action plan measures in CZ (P) and DE (C)

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
CZ	P	n: increase domestic production; improve financial viability, yields, quality, price transparency; reduce production costs; effective use of support, incl. in environmentally sensitive areas; arable 20% of total organic area	o: improve marketing; effective use of support; priority access to RDP support	p: increase organic market share and presence in retail outlets; reduce consumer prices; improve conditions for supply chain providers; support for alternative marketing channels; support for vertical links between farmers, processors, traders; direct/regional marketing;	q: increased sales through catering and gastronomy	r: increased sales through catering and gastronomy	s	t: introduction of national organic logo for domestic products	u: monitor use of GMOs in EU and maintenance of prohibition in organic;
DE	C	a: improved remuneration of public goods delivered by organic farming, specifically environmental sustainability and climate	b: support for processing	c: improved input markets including breeding, data and farm management tools; improve supply chain management and networks; further develop fair partnerships; target support at small, medium enterprises and regional initiatives	d: increase availability in public canteens, with 30% by 2027 target for federal government institutions	e: increased share of out-of-home catering; easier access to organic for businesses involved; support for advice	f: methods of organic farming as option for food security in global South	g	h: reduction of bureaucratic barriers; further development of EU organic regulations

Table 9.3e: Comparison of current/planned and previous production and market-related national organic action plan measures in DE (P) and DK (P)

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
DE	P	n: ensure sufficient resources for organic support payments; introduce conversion support for part-converting farms; develop concept for remunerating environmental outputs from organic farming	o	p: support cooperative management of organic supply chains; extend RDP support for organic supply chain development	q: increase share of organic products purchased by Fed. Ministry for Nutrition and Agriculture (BMEL); implement information measures to increase share of organic in public procurement	r: support advice on use of organic products in out-of-home catering	s	t	u: problem-focused development of EU Regulation (residue thresholds, seed derogations, protein sources, plant protection, young poultry); regulatory support for seed and transplant production; reduce emissions regulatory barriers in animal production; reduce hygiene requirements for small processors
DK	P	n: aid for farmers maintained in new organic scheme; extra biodiversity actions on fields >5ha; commitment to build soil carbon; faster payment options incl. IT; simplification of future support systems	o: 130 MDKK total in Fund for Organic Farming, priorities to be determined by Fund with sector; explore potential of biogas, bio-refineries and household sewage use	p	q: less emphasis than in earlier action plans	r: further develop local hotel, restaurant and catering markets, building on public procurement experience; consider regulatory options; significant potential for tourism as well; facilitate access to gold standard for catering	s: further develop export markets, central to DK efforts; ministerial engagement; agreements with China	t: logo and related information available in multiple languages to support tourism	u: replace current catch crops requirement with soil carbon commitment; legal aspects of urban waste and sewage use on organic farms; further develop EU standards to support public goods delivery; recognition by China of DK regulatory system

Table 9.3f: Comparison of current/planned and previous production and market-related national organic action plan measures in EE

Country	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Public procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
EE	C	a	b: support for investments by producers, processors, distributors	c: cooperative actions between producers to purchase inputs and market products; supported by information days; strengthening short supply chains and direct marketing	d: 50% of schools serving organic food; product requirement information for producers; supply chain logistics; training caterers, food service providers; information days for caterers	e: information days for caterers; GreenKey information for tourist establishments	f: increase exports to EU, third countries; increase organic share of total exports to 7.5%; provide info on int. trade fairs, other events; joint trade stands; identify export partners; develop business capacity to manage sales, marketing; promote export cooperation, information exchange;	g: increase recognition of EE (to 80%) and EU (75%) logos;	h: support for certification costs enabling reduction or abolition of fees
	P	n: support organic crop and livestock production	o: support processing of organic feedstuffs, incl. unusual protein crops; improved animal housing; horticultural buildings, machinery, irrigation; orchard establishment; aquaculture facilities; processing, grading, packing, storage, distribution facilities	p: producer groups for input purchasing, product marketing; increased range of organic products; short supply chains, regional consumer networks; increase cooperation between farmers, processors, traders; international projects; support for umbrella organization for development of cooperative initiatives	q: information, guidelines on organic for procurers; inclusion of organic in childcare institutions; school milk and fruit options;	r: regional tourism map with locations of organic businesses; information for caterers; labels indicating use of organic in catering; cooperative initiatives to source organic products, from EE and abroad	s: collection of information on exports from other EU countries; participation in trade fairs, other events	t	u: establish good regulatory basis; improve control system efficiency, quality, IT; database for organic seed; improve admin., simplification, databases; online services for clients; GIS-data; international cooperation incl. training

Table 9.3g: Comparison of current/planned and previous production and market-related national organic action plan measures in ES-AND and FI (C)

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
ES-AND	P	n: consolidate growth; strengthen financial, ecological performance; conversion, maintenance of organic crops, livestock; agri-environment support for organic; support for aquaculture; support for the participation of women, for women's property rights in farms, increase recognition of women's contribution in organic farming	o: support for farm improvement, young farmers; support for processing modernisation	p: analyse behaviour of organic products in marketing channels; improve marketing at local, national, international levels; development of short supply chains; development of information and marketing support in producer groups; activities to increase added value, competitiveness in sector	q: support consumption in schools, social institutions	r: support consumption in hotels, restaurants, catering sectors	s	t	u: increase trust in and transparency of control system; harmonization of regulations and sector organisation; improve administrative coordination, communication; enhance representation; strengthen Council for Organic Production; establish provincial committees; control campaigns in retail outlets; consolidation of SIPEA information system
FI	C	a: increase production to meet demand; balance crop, livestock production; increase protected cropping, organic seeds; increase payments for beekeeping	b	c: increase value of organic products; develop short supply chains; support for the establishment of producer groups; develop regional strategies; strengthen sector involvement in export initiatives	d: increased use of organic in public catering; incl. schools; regional/community targets; develop appropriate menus	e: increased use of organic in tourism, hospitality catering sector; increase product range; develop certification system	f: make FI significant exporter, esp. wild berries; explore aquaculture opportunities; establish export clusters; participate in trade fairs	g: assess experience in other countries with organic logos and branding	h: implementation of new EU regulation; international comparisons for cost-efficient certification; group certification; development of electronic control methods; develop consumer trust; fraud prevention; wood production standards

Table 9.3h: Comparison of current/planned and previous production and market-related national organic action plan measures in FI (P) and FR

Country	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
FI	P	n: 10% annual growth to reach target, especially livestock, horticulture; ensure sufficient financing	o: support for manure, slurry management facilities	p: increased range of organic products, supported by stronger supply chain networks, producer organisations, regulatory simplification for small businesses	q: inclusion of organic food in canteens, public catering; supported by information, advice	r: tourism initiatives; improve organic access to catering establishments	s: export strategy from Team Finland	t	u: revision, implementation of EU regulations; adaptation of control system to meet challenges; review allocation of staff to control activities;
FR	P	n: increase production; increase awareness of alternative funding sources; increased support for group conversion; establish a fund to provide extra financial support to producers affected by external contamination; access to land	o	p: mobilise actors to identify priorities for balanced sector development; consistency with sector ambitions animal welfare and biodiversity; exploit synergies with actions of development networks; organize meetings between relevant parties to discuss key issues for markets, regulations, research and financial support	q: implement goal of 20% organic share of procurement; develop tools to facilitate contracts, supplies and best-practice guidelines	r: increase use of organic products in commercial gastronomy; education of trainees planning a career in catering and retailing	s: introduce promotional activities to increase exports of organic products; use the IFOAM World Organic Congress to focus on FR products; support organic farming development in overseas territories, including consideration of biodiversity impacts;	t: clarify the conditions for using the AB logo and relationship to organic and environmental certification	u: complete process of geolocating organically certified land parcels to facilitate data exchange; adaptation of regulations to encourage organic; implementation of new EU regs; assist farmers accessing plant-based medication for animals; organization of meetings on needs of organic farmers concerning health, plant protection regulations

Table 9.3i: Comparison of current/planned and previous production and market-related national organic action plan measures in HR and HU (C)

Country	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
HR	C	a: support for new organic producers, maintenance; support for seed, plant production, incl. variety maintenance; support for biodiversity actions	b: aid for producers and processors (meat, dairy products); support for small producers; aid for renewable energy	c: support for producer organisations; support for domestic marketing of organic products; support for distribution and processing centres; support for short supply chains	d: support for producer organisations with public procurement; development of regional models for inclusion of organic products; minimum organic share in schools; training for procurement professionals	e: legal framework and standard for organic hospitality label; co-funding of certification costs	f	g: introduction of requirement to use HR eco-label on HR organic products	h: co-funding of certification costs
	P	n: financial support part of EU accession	o: use of renewable energy in organic farming	p: support for the activities of organic organisations	q: support for inclusion of organic in public kitchens	r: development of HR standards for shops, restaurants, agritourism, hotels	s: organisation of trade fairs; support for participation in other trade fairs	t	u: regional, national structures, budgets for action plan implementation; oversight of organic control bodies; introduce certified wild plant collection; harmonization of HR, EU regs
HU	C	a: increased support for horticulture and livestock production; specific support regulation	b: 10% higher grants for organic processors; increase no. supported business by 20%	c: support for producer groups; improved input availability for supply chain, incl. seeds, feeds, pesticides; improve producer, processor networking; supply chain development programme	d: green public procurement strategy by end 2023; 20% of all contracts should be for HU organic products; training of responsible officials to ensure inclusion	e: encourage use of organic products in out-of-home catering, incl. certification	f	g: explore option of HU organic logo; bio-region branding and support	h: support for alternative certification systems; implementation of organic regulation; info campaign on group certification; consultations between government and sector organisations; analyse/publish data on non-compliances and presence of prohibited substances

Table 9.3j: Comparison of current/planned and previous production and market-related national organic action plan measures in HU (P) and IE

Country	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
HU	P	n: support for organic production and key products; integration of organic farming in agri-environment measures	o: integration of organic farming in national RDP measures	p: co-operation between actors and development of supply chains; co-operation between producers and market actors with information networks to improve marketing and processing of products; producer-consumer networking and information exchange	q: increase use of organic products in educational, social and health institutions	r	s: increased presence in national and international trade fairs; engagement with international networks, programmes and initiatives; strengthen emphasis on domestic inputs, production and consumption	t: promotion of EU organic logo; development of marketing strategy for HU products	u: support for effective oversight of organic markets; increased professionalism of certification system; review regulations to improve transparency, simplification and penalties for non-compliance; regulation of control bodies;
IE	C	a: support conversion; make scheme more effective, market-focused; ensure continuity; consider additional support for suckler cows, protein crops	b	c: support producer organisations in horticulture	d: promote awareness of opportunities; develop pilot project	e: encourage use in hospitality sector	f	g	h: continued regulatory development; share information on regulatory changes
	P	n: increase scheme effectiveness and market focus; review payment levels by sector	o	p: support producer organisations and market development; encourage processor engagement	q: develop opportunities incl. baseline commitment	r	s: identify potential export markets	t	u: address regulatory constraints on aquaculture development

Table 9.3k: Comparison of current/planned and previous production and market-related national organic action plan measures in IT

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
IT	C	a: support for conversion to increase production, incl. new entrants in mountain areas; use of complementary eco-schemes; development of strategy for organic seed production	b: increased support (from 50% to 60%) in fruit sector	c: RDP support for producer groups; further development of bio-districts, also as core focus for agri-environment measures, incl. formal recognition by Ministerial decree, information on best practice; strengthening of supply chains; local marketing; inter-business network contracts	d: inclusion of organic in public procurement; regional financial support for school canteens	e: inclusion of organic in hospitality catering	f	g: introduction of IT organic logo (Biologico Italiano); preparatory studies; establishment of technical implementation capacity; definition of procedures and eligibility conditions; other steps required for implementation	h: implementation of and support for group certification, especially in Bio-districts; strengthen consumer trust in control systems, traceability and fraud prevention; establishment of database to monitor product flows, potentially with blockchain; revision, harmonization and rationalization of regulations; improved controls of imports
IT	P	n: RDP support, regional consistency in implementation; explore potential for system approaches; investigate options for improving audit and sanctions	o: priority for organic projects	p: RDP support for organisations and supply chain development; strengthening supply chain relationships; improving input availability; support for Bio-districts;	q: support for organic and environmental procurement – hospitals, schools, green spaces; review of regulatory provisions and experiences with organic products, establishment of working group to find solutions	r: similar to procurement	s: promotion of organic products 'Made in Italy'	t: evaluate commercial options for introduction of IT organic logo	u: improve co-ordination between national, regional authorities; standardize risk control approaches, other procedures and charges of control bodies; strengthen import controls, incl. digital systems; simplification of organic regulations without undermining consumer trust or quality of IT organic products; agree single national standard text; assess implications of introduction of group certification

Table 9.3I: Comparison of current/planned and previous production and market-related national organic action plan measures in LU, LV and MT

Country	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
LU	C	a: enhance payments, simpler eligibility; study of options for conversion support	b: easier access to support for small and new farms	c: market development initiatives for different sectors; better utilization of by-products to reduce waste; co-operation scenarios; networks for new entrants	d: public catering to have 50% of products from LU by 2025 (20% organic, 30% local); guide procurement policies of public institutions to organic products	e	f: promote LU organic products regional, nationally and at European levels	g	h: support for certification costs
	P	n	o	p: beef production, marketing project	q	r	s	t	u
LV	C	a: balanced development of sub-sectors; encourage new entrants, conversion	b: local, small-scale processing; strengthen organic aquaculture	c: improve sector communication; promote co-operation between producers and with other sectors; promote short marketing chains	d: incl. in LV Green Public Procurement; school milk, fruit schemes	e	f: promote exports	g	h: implementation of regulations, sustainability standards; increase consumer confidence through increased testing, controls; digital technologies for traceability
MT	C	a: increased financial support for conversion/maintenance; for landowners to rent out land; encourage protected cropping; support for organic aquaculture	b: support on-farm productive investments and start-ups, and off-farm processing	c: develop channels for direct selling of organic food including farmers' market; promote establishment of organic producer organisations	d	e: facilitate access to organic products for hotels, restaurants and catering	f	g	h: facilitate access to plant protection products not currently registered in MT; facilitate the certification process for aquaculture; assess organizational capacity and development needs of responsible authorities; establish organic food forum and website

Table 9.3m: Comparison of current/planned and previous production and market-related national organic action plan measures in NL and PL

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
NL	C	a: financial support for organic farms under eco-scheme (gold level) and for conversion through regional rural area transition fund	b: support conversion investments through sustainable agriculture investment fund	c: sector-led accelerator for market channel development; supply chain development agreements; explore options for price reductions	d: 25% target for central government procurement; other authorities to follow; include in school milk, fruit schemes	e: explore opportunities to increase use of organic in hospitality catering	f: support development of exports; participation in trade fairs; maximise opportunities for NL exports in EU trade agreements	g	h: encourage retailers to be certified to sell unpackaged products; review certification costs to reduce prices; reform land leasing regs to encourage longer leases with sustainability focus, also for public agencies
PL	C	a: financial support for organic producers incl. aquaculture; support for certification costs;	b: priority support for organic producers, processors, seed producers	c: support for producer organisations, strengthening position in supply chain; co-operation between supply chain actors, local authorities	d: support for inclusion of organic in public procurement, esp. schools;	e	f	g	h: maintenance of trust in sector; strengthen effectiveness of control system; encourage training, information sharing; standardize approaches; information on available inputs (animals, seeds, plants etc.)
	P	n: increase competitiveness and supply with financial support	o: support for processing of organic products	p: support local networks of producers to develop market opportunities; strengthening, diversification of marketing channels, incl. farmers markets; improve organic sector integration, representation	q: engage local, national authorities in supporting sector development, e.g. via LEADER; develop green procurement initiatives	r	s	t	u: maintain high standard of control; review, improve certification system; build consumer trust; encourage best practice through training, international co-operation; support producers with conversion costs; utilization of derogations;

Table 9.3n: Comparison of current/planned and previous production and market-related national organic action plan measures in PT and RO

Country	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
PT	C	a: support for organic conversion, maintenance, in particular in Natura 2000 and other environmentally sensitive areas	b: easier eligibility for pigs, poultry, bees, mobile slaughtering capacity, processing, food preparation	c: support engagement of organic producers with local and wholesale markets	d: use procurement to increase demand; increase organic share in school milk, fruit; inclusion in catering linked to promotion of Mediterranean diet	e: encourage inclusion of organic in tourism and recreational activities, in framework of local development plans	f	g	h: make certification costs tax-free; increase availability of organic seed, reproductive plant material of traditional varieties; facilitate registration of plant protection products permitted in other EU countries
RO	C	a: increase income for smaller farms; payments per ha similar to previous period; support for environmentally-certified social/care farms	b: financial support for investment in marketing and processing	c: expansion and diversification of under-represented sectors; producer organisations; innovative supply chains	d: procurement of organic for environmental benefits; more organic fruit and veg. in public canteens; staff training; simplified certification procedures; pilot projects	e: support for pilot projects with hotels, restaurants, catering; creation of organic routes and centres in mountain areas	f: work with embassies to increase exports; export councils to promote organic; participation in trade fairs; work with export enterprise clusters to improve international visibility	g: protection of organic labels and terms	h: build consumer trust through effective controls; enhance industry/regulator co-operation; improve fraud detection; effective regulatory framework; laboratory testing for imports

Table 9.3o: Comparison of current/planned and previous production and market-related national organic action plan measures in SE and SI (C)

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
SE	C	a: review conversion support to better address conversion of new land where animals already converted	b: identify risk capital to support start-ups, technological innovation; long-term perspectives	c: encourage supply chain co-operation;	d: increase share; training for all on affordable menus, organic production; regional platforms for public sector/producer dialogue	e: clarify what can be said about organic in restaurants and how it can be controlled; increase knowledge in private catering sector; digital app to assist location of outlets	f: increase exports, EU trade; encourage Business Sweden to implement export strategy	g	h: clarify digital traceability options and implications for distribution
	P	n	o	p: more products in retailers; more co-operation in supply chains; producer/processor meetings	q: more in public catering; training for staff; identify best practice; knowledge exchange seminars	r: more organic food in commercial kitchens; training for staff; identify best practice	S	t	U
SI	C	a: increase share of CAP support; 3% beekeepers; horticulture 30% of organic UAA; 25% UAA in water protection zones; 30% UAA in nature conservation zones; young farmers, new entrants	b: increase funding to modernize technology, production, processing, adapt to climate change, protect environment; incl. organic aquaculture	c: >10 producer groups; regional processing, distribution centres; short supply chains; organic regions; market integration; funding for SI organic farmers, association	d: increase share in public institutions, consistent with Green Public Procurement decree; free entry in catalogues; training for catering managers	e: 25 mass-catering institutions; 30% of agri-tourism holdings; promotion initiatives; co-financing of certification costs	f	g: establish common brand for SI organic food; supported by promotional activities	h: increase certified seed with co-financing of certification/registration costs; establish central database of authorized inputs; also relevant research information and training materials; increase availability of EU authorized plant protection products in SI; prohibition of GMOs

Table 9.3p: Comparison of current/planned and previous production and market-related national organic action plan measures in SI (P), SK and NO

Country	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
SI	P	n: ensure further development of sector; enable all interested to convert; organic seed production; protected areas	o: support investments on organic farms, incl. processing, green tourism	p: integration of different sector interests; development of short supply chains; networking of producers; joint storage/ distribution facilities	q: increase use of local, quality food in public institutions	r: include organic in tourism, gastronomy	s: ensure equal position of SI products in EU markets	t: promote official national and EU logos	u: ensure consistent, EU-compliant control system; strengthen co-operation between agencies; improve supervision of control bodies; improve import controls; ensure protection from GMO contamination; establish organic seed database
SK	C	a: support for organic farmers, increase domestic production	b: support farmers investing in processing	c: support producer organisations; develop regional sales hubs, storage depots; concentration of supplies for sale into larger outlets; direct sales to consumers; identification of processing capacity; increase product range, support affordability for local sales	d: inclusion of SK organic products in schools, hospitals, other public catering	e: support for organic agri-tourism	f	g: publicise EU logo, linked to consumer promotion campaign	h: intensify co-operation between SK state and administrative authorities; ensure effective control system; implement TRACES certificate system; fight fraud; laboratory testing facilities; implement new regulations; link control bodies to SK database; identification of organic land parcels
NO	C	a: support for conversion and organic production	b	c: supply chain co-ordination to grow market	d: engage with public procurement; information and advisory support	e: engage with hospitality catering; information, advisory support	f	g	h: maintain regulatory committee for organic farming; assess future regulatory requirements in context of instruments, R&D and advice.

Table 9.3q: Comparison of current/planned and previous production and market-related national organic action plan measures in EU and CH

Coun-try	Action plan	1. Area support	2. Investment aid	3. Group actions	4. Procurement	5. Tourism, gastronomy	6. Export, trade fairs	7. Logos, branding	8. Certification, regulations
EU	C	a: encourage conversion support via CAP, CFP, incl. exchange of best policy practice with MS; promote gender equality, young farmers	b: encourage investment support via CAP, CFP, incl. exchange of best policy practice with MS	c: closer integration of organic sector, incl. via producer organisations; reinforce local, small-scale processing, short supply chains; use of bio-districts	d: promote organic canteens, green procurement; boost awareness of criteria; MS to set ambitious targets; reinforce school milk, fruit schemes	e: enhance role of private sector in promoting, utilising organic food	f: promote organic in export markets, supported by free trade, equivalency agreements	g: promote EU logo, measure consumer awareness	h: prevent food fraud, strengthen consumer trust, robust supervision of control systems in MS; improve information, data exchange; improve traceability with database of certificates of all EU operators, regular checks; evaluate use of blockchain, digital alternatives; raise awareness of group certification
	P	n: increase MS awareness of synergies with other CAP measures	o: increase MS awareness of synergies with other CAP measures	p: increase MS awareness of synergies with other CAP measures	q: revise green public procurement criteria, provide information on organic opportunities	r	s: co-operation with trade partners in developing countries; assess opportunities for plurilateral agreements with leading organic partners; assess data collection options; support development of international aquaculture standards; protection for EU logo in third countries	t: periodic surveys on consumer awareness of EU logo	u: publication on production, processing rules and support measures; survey on consumer awareness, confidence in scheme; electronic certification for imports, internal market; rationalization of administrative and certification systems
CH-AG	P	n	o	p: establishment of co-ordination office to support networking	q: develop business plan to improve logistics and supply co-ordination	r	s	t	u

9.4. Comparison of current/planned and previous information-related action plan measures

Table 9.4a: Comparison of current/planned and previous information-related organic action plan measures in AT and BE-VLA (C)

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, innovation	13. Statistics, market data
AT	C	i: wide ranging promotion campaign focused on environmental and animal welfare benefits and research evidence; tastings in schools and on farms; booklet to support direct marketing; social media activities; awards to promote good examples; regional products; brochures	j: field days, conferences; animal welfare hotline; demonstration farms; new media for advisory information and tools; increased cross-regional advisory capacity, promotion of knowledge platforms, linking research, training, advice	k: knowledge transfer workshops; increase emphasis on organic in higher education; training of advisers on specific topics and on new market opportunities, and on nutrient budgeting for better rotation design; international networking of advisers	l: specific research programme; priorities include climate, soil health, digitalization and automation, technical aspects; establishment of research platform; expert meetings and workshops for information exchange; integration of practitioners; linking with EIP opportunities; dissemination activities,	m: improved availability of financial data; further development of market data and analyses through AMA, extend range of statistics
	P	v: increase demand through better information: publications, awards, promotion of AMA logo for regional identity, focus on environmental benefits	w: field days, conferences, funding for organic advisers	x: continuation of existing RDP-funded training (workshops, courses, study tours, adv. qualifications), with specific focus on organic, updating, extension of online gross margin app.; also for advisers and trainers, course material portal www.biola.at	y: specific research programme, expert meetings and workshops for information exchange; priority focus on alternative protein sources, copper alternatives and maintaining soil fertility, related dissemination activities, linking with EIP opportunities	z: financial data
BE-VLA	C	i: more information; increase consumer awareness of and trust in the benefits of organic; more media coverage; school activities	j: specific conversion advice and training; introductory courses; information for farmers and advisers; information and advice for supply chain	k: information portal 'Bio seeks farmer'; training for all levels of supply chain; agriculture and horticulture courses to cover organic	l: strengthening networks for research and dissemination; integration of agroecology and organic in living labs; expand network of beacon farms; annual research calls; extend international engagement	m: statistical data collection including prices; monitoring of action plan results; annual organic report

Table 9.4b: Comparison of current/planned and previous information-related organic action plan measures in BE-VLA (P) and BE-WAL

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, innovation	13. Statistics, market data
BE-VLA	P	v: school activities	w: farm visits on demo farms; experience reports from farmers; conversion information and knowledge exchange; organic knowledge networks; mentoring of farms in conversion	x: emphasis on organic in agricultural courses	y: practical research and dissemination; inclusion of organic in existing activities, e.g. participation in EIP operational groups; extension of organic knowledge network	z: financial data; sector-specific market data
BE-WAL	C	i: web-portal to integrate information resources from several organizations and address all user groups, incl. German-speakers; common promotion of action plan; consumer promotion actions, emphasise local products; more focus on organic in general advertising; increased media engagement, evidence-based, avoiding polemics	j: development of specific information resources for professionals, covering technical, business and regulatory aspects; raise awareness of available advisory and other services; encourage advisory organizations to engage more with organic; information events; video clips; increase awareness of responsible individuals and organizations providing support	k: inclusion of organic in agricultural courses and institutions; training of advisers, trainers and work-experience leaders; support for farms offering training placements; communication and inventory of training opportunities; development of training materials; organization of jobs fair and jobs videos for graduates; communication, media training for businesses	l: development of organic farming research and integration with existing programmes at regional, national and international levels; facilitating dissemination of research results	m: development of information and data system on organic farming in Wallonie; prioritization of key data sets, e.g. prices; data collection, analysis, reporting and dissemination
	P	v	w: information, advice and other communications targeting professionals and farmers considering conversion	x: emphasis on organic in agricultural courses	y: restructure, strengthen research capacity; prioritise topics, funding; identify researchers, capacities; stocktake of completed research; inter-national co-operation; conversion-focused innovation initiatives	z: improvement of data availability to support business decision-making

Table 9.4c: Comparison of current/planned and previous information-related organic action plan measures in BG and CY

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, innovation	13. Statistics, market data
BG	Cp	i: stimulate demand and increase consumer confidence; promotion of organic products at events and with targeted information; advertising campaigns; clarification of organic labels; organic week: organic awards; farm open days	j	k: develop resource for teachers on where food comes from, how produced, and benefits of organic; develop specific courses for organic farming and aquaculture; farmer study tours	l: biodegradable plastics; water conservation; renewable energy; emissions reduction; nutrient cycling; improve animal welfare and nutrition, alternative proteins incl. algae; better genetic biodiversity and yields; aquaculture incl. nutrition and welfare	m: develop system for public access to production and market data across whole supply chain
	P	v: develop and implement promotion strategy to grow national market; national organic festival; preparation and dissemination of information materials; media engagement	w: efficient and active extension service at national level (production, marketing, processing, farm management); increase number of consultants, incl. training and register; financial support for advice	x: practical workshops and networking; technical magazine, publications, website; training and education available in secondary and high schools; pilot project for inclusion of organic in school curriculum	y: applied scientific research for business and public benefit; specific technical issues; models for mixed systems; economic analysis incl. prices; dissemination of results	z: preparation of situation and market analyses on production, consumption at global, EU, BG levels; publication on Ministry website; financial data for banks
CY	C	i: promoting organic farming and the EU logo; establishment of Organic Farming Week with lectures, educational material at points of sale of agricultural products and other events; private sector promotion actions	j: strengthening advisory services and AKIS also for aquaculture; promoting knowledge exchange between stakeholders; demonstration farm network; establishment of a national expert group and network of advisers; updating register of advisers; monitoring level of advice provided; articles in farming media	k: exchange best practices (education/ training programmes, courses, materials) at EU and national level; training providers to present innovative solutions aimed at the organic sector (production, processing, retail and consumption); animal welfare modules	l: research primarily through linking with Horizon Europe projects, topics including animal nutrition and alternative protein sources; aquaculture (alternative sources of nutrients, breeding and welfare of fish; sharing relevant information via EIP	m: publication of the annual report on organic agriculture; market sectoral analyses for transparency; provision of annual statistical data to Eurostat; inclusion of organic in National Market Observatory

Table 9.4d: Comparison of current/planned and previous information-related organic action plan measures in CZ and DE (C)

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, innovation	13. Statistics, market data
CZ	C	i: increase consumption through awareness raising and promotion campaign; increase trust; address price and accessibility concerns; information on environmental and other benefits	j: support for advice, if possible free, on production efficiency, conversion, marketing, financial aspects and on-farm processing; demonstration farms, projects; transfer of research results; specific advice on inputs; sustainability planning	k: communication of knowledge and use of research results in schools and higher education; increase organic content of training courses for farmers and advisers; ensure availability of training courses; support for preparation of course materials; online portal for exchange of materials	l: increase research funding (aim equivalent share to land area share); independent evaluation of inputs and publication of results; evaluation and dissemination of animal welfare and environmental impacts, specifically water and climate; research co-ordination; establish environmental impacts database	m: improve data collection on organic production, marketing and consumer attitudes; with specific focus on key products
	P	v: increase consumption of organic products, incl. domestic (aim 60% of total organic sales; 600 CZK/per head annually); increase consumer awareness, trust and access to organic through promotion campaign; increase awareness of animal welfare and environmental benefits; increase organic awareness in schools	w: ensure organic farmers have access to information comparable to that available for non-organic; advisory support to improve animal welfare and environmental practice; advice to help with knowledge transfer from research; demonstration farms; identify producer information needs; supply chain advice; advisory co-ordination	x: training co-ordination; training in production and marketing; use of RDP resources; cover in organic principles in school/college courses	y: increase research funding (aim equivalent share to land area); evidence on animal welfare and environmental impacts; identification of relevant research priorities incl. production efficiency; co-ordination of research strategy, project funding and dissemination of results; regular evaluation and adaptation of policy support	z: sufficient market information; monitoring of consumer attitudes to organic;
DE	C	i: organic information campaign	j: focus on increased crop yield potential, legume use, improved grassland systems, animal production and welfare; regional conversion concepts; agricultural biodiversity; improve knowledge transfer structures, methods	k: training for organic production and processing in whole supply chain; encourage college/ university education and professional development	l: more research and knowledge transfer for the whole food system; increase emphasis on organic in government institutes; strengthen regional capacities for research, knowledge and innovation; applied research for system transformation	m: increased data availability

Table 9.4e: Comparison of current/planned and previous information-related organic action plan measures in DE (P), DK and EE (C)

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
DE	P	v: continued as part of Federal Organic Farming Scheme (BÖL)	w: establish demonstration network for herbage legumes; extend support for conversion advice; development of and access to advisory tools	x: amend agricultural training regulations to better integrate organic farming; networking and exchange between trainers; evaluate and develop training modules and materials; extend training and professional development of advisers	y: set and implement federal research priorities; evaluate potential protein sources, research into alternatives, technical methods of processing; improve framework for plant protection; continued funding of research (30 M€pa) as part of Federal Organic Farming Scheme (BÖL)	z
DK	P	v	w: information on biodiversity and climate options; encouragement of circular thinking for nutrients	x	y: 25 MDKK funding in 2018; new long-term research strategy to improve yields, sustainability and competitiveness; develop solutions for closing regional nutrient cycles; identify alternative nutrient, protein sources consistent with organic principles; investigate potential for urban waste as nutrient source	z
EE	C	i: increase consumer knowledge; websites sharing information, promoting organic; 20% regularly buying organic; develop, implement long-term communication plan; review organic claims with experts; tell story of organic; initiatives in school curriculum, farm visits	j: information days (80 pa by 2030), publications on organic farming and aquaculture; feasibility study on organic aquaculture in EE; double number of organic advisers and mentors (to 20); development of advisory system, including consultants and their training, for production, processing, catering, marketing, innovation and entrepreneurship; establish mentoring system	k: youth information, education to encourage engagement; access to vocational and higher training courses, modules and specialisations; provide training for trainers; analysis of vocational and higher education curricula, development of courses and teaching materials; opportunities for non-formal education	l: encourage business links with universities, research institutions to foster RTD, knowledge exchange; identification of research needs; livestock sector surveys, studies for different species; crop production incl. soil fertility, plant health, diversity; long-term trials with producers; participation in international networks, programmes; associated knowledge transfer programmes	m: map key info sources and contacts; conduct market research; collation, dissemination of data needed for sector development; data on organic production, retail markets and exports; survey of processors by sector

Table 9.4f: Comparison of current/planned and previous information-related organic action plan measures in EE (P) and ES-AND

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
EE	P	v: awareness raising, information campaigns, media actions; publish materials for different target groups incl. school and health professionals; communicate research results in appropriate form; awards for best organic producers, products, caterers, media articles; annual events, conferences, farm visits	w: increase use of advisory service for organic; information portal for traders on organic standards, products; preparation of advisory materials; dissemination of research results	x: training and information days for businesses; development of long-term training programmes; training of advisers incl. course development, provision; joint study days for producers, advisers and inspectors; co-operative initiatives, also international; increase access in universities, colleges; HE course development for producers, processors, caterers	y: develop production techniques, extend range of products; seed breeding, production; development of knowledge transfer centre; mapping of organic research and scientific capacities; identification of development priorities (production methods, food quality, socio-economic aspects); list of topics for MSc and PhD students; encourage producer, processor participation (EIP operational group); increase state contribution to co-operative initiatives; international co-operation	z: survey of market, consumption, prices, exports
ES-AND	P	v: improve knowledge of production methods; support for consumption of organic products; actions to support marketing of organic products nationally, internationally; support for non-commercial horticulture;	w: advice, planning, development of organic crops, livestock; support for advisory services; demonstration and information strategies; technical publications, preparation of materials for Servifapa platform	x: development of training programme for advisers; support for specific training in context of professional development	y: specific studies, strategies to improve knowledge; livestock; sectoral, regional strategies, pilot projects; financial performance; improvement of composting; improvement of biodiversity, sustainability on organic farms; use of organic seed	z: technical support for monitoring, evaluation of action plan; support for price, market data in CAPDER observation centre

Table 9.4g: Comparison of current/planned and previous information-related organic action plan measures in FI and FR

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, Education	12. Research, Innovation	13. Statistics, market data
FI	C	l: stimulate demand; inform consumers; increase recognition of organic labels, awareness of new EU regulation; increase consumer confidence in benefits of organic farming	j: secure high-quality advice; improve organic competence, knowledge, as part of AgriHub; targeting farmers, advisers, food sector, exports; encourage use of organic seeds	k: develop training, education provision; strengthen co-operation between institutions and organic sector; focus also on professionals working in processing, public and hospitality catering, exports	l: implement organic research strategy, incl. digitalisation opportunities; development of inputs (seeds, varieties, organic fertilisers, crop protection); field vegetables, protected cropping; forestry systems; aquaculture; clarify sustainability benefits; rapid dissemination of results, including pilot projects, trials; use of EU Horizon and EIP funding	m: assess data requirements and opportunities to improve data processing, from farm table; development of organic production statistics
	P	v	w: rapid dissemination of research results in FI	x: systematic provision of training, CPD	y: research funding allocated primarily via ERANet; alternative protein sources; also use of EIP operational groups and Horizon 2020 EU research programme	z: increased availability of data from certification system and additional market data
FR	P	v: encourage consumption; advertising campaigns led by Agence Bio with support of sector organisations with aim of recruiting new and disadvantaged consumer groups; communicate the characteristics and benefits of organic products to consumers	w: consolidate technical, economic, ecological, social aspects to better support producers; establish thematic action with relevant agencies; facilitate access to information, knowledge exchange between farmers, focus on inputs (animals, seeds, feeds), databases, internet portals; awareness raising among non-organic producers	x: raise organic profile in education; integrate organic in sustainable production courses; oversee training in Formabio-network; preparation of materials for trainers, schools; expansion of training provision for farmers, including for conventional producers; encourage college farms to include organic; develop partnerships between colleges and professional networks; better integration of organic research results in higher education; inclusion of organic as topic in nutrition, health education	y: strengthen research and development; determine priorities with stakeholders; support development of seeds and transplants; strengthen capacities in technical research institutes, in the INRA Metaprogramme and through project calls; technical research also for processing; continuation of work on the environmental impacts of organic farming and link to remuneration of environmental benefits; experimental trials and dissemination at regional level; strengthen co-ordinating role of ITAB; define new mandate for organic research council (CSAB)	z: development of information system by Agence Bio; obligatory provision of statistical data by control bodies; improve understanding of national EU and global organic markets; strengthen the role and resources for regional observation centres in co-operation with Agence Bio; preparation of price and production cost data and distribution in value chain

Table 9.4h: Comparison of current/planned and previous information-related organic action plan measures in HR and HU

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
HR	C	i: promotion campaign for farm and aquaculture products; HR organic day; clarification of organic food benefits for food organisations	j: information for young farmers, new entrants; support for agric. advisory system; establish specialist unit in farm advisory service; train advisors; establishment of pilot farms, demonstration centres	k: establishment of training centres; compulsory training for producers; inclusion of organic farming in schools (all levels) and higher education curricula	l: development of resource banks for seeds, plants; reduced costs for registering varieties; support for co-operation between research institutes and organic producers	m
	P	v: information, promotional campaign	w: secure sufficient organic advisers in HR chamber of agriculture	x	y: creation of plant, animal genetic resource bank; organic research programme	z
HU	C	i: award for best organic product from 2023; promotion campaign	j: strengthen advisory services; train advisors; establish national advisory system; establish demonstration farm network; preparation of information resources for farmers on technical and environmental issues	k: strengthen training provision; review formal and informal availability	l: strengthen research, innovation; establish task force to set strategic priorities, fund projects, encourage co-operation between researchers and sector; build capacities; support EIP operational groups; integrate with Horizon Europe incl. agroecology initiatives; double no. of delegates in national and international working groups; designate 10% of PhDs, funding to organic topics	m: ensure digitalization strategy for agriculture also meets organic sector needs; including for certification; collection of market data on organic sector; establish online database
	P	v: consumer awareness raising and trust building with objective information system, demonstration farms, model regions, involvement of health and educational organisations; promotion of organic products and certification; inclusion in schools	w: detailed analysis of organic advisory system including obligatory training and certification of advisers; definition of required expertise, information and skills; integration with national and regional institutions; establishment of demonstration farms	x: obligatory training for farmers, advisers, inspectors and officials working with organic farmers; development of training, educational systems and access to information; inclusion in courses for students and apprentices	y: applied organic-specific, multidisciplinary research programme; long term research strategy; continual preparation of HU and international information available online and in print for producers concerning production and marketing aspects and available support	z: review data collection systems for organic farming statistics to improve data availability, including production, certification and environmental data; projects on consumer characteristics

Table 9.4i: Comparison of current/planned and previous information-related organic action plan measures in IE and IT (C)

Coun-try	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
IE	C	i: increase promotion, also by Bord Bia with EU funds; sector-led multi-annual strategy; focus on consumer understanding, awareness of availability, seasonality; National Organic Week	J: knowledge transfer initiative for sub-sectors, supported by producer groups, incl. demonstration farms, discussion groups	k: dissemination of research results; include in educational programmes, apprenticeship schemes, internship programmes	l: improve production efficiency; promote local seed production and database; produce technical guidelines for specific enterprises	m: value chain analysis incl. supply statistics by sector incl. aquaculture; financial data; market supply/ demand reviews; purchasing of commercial market data
	P	v: increase consumer awareness of local and seasonal organic products	w: maintain existing advisory service and identify specialist needs; support demonstration farms, discussion groups	x: increase emphasis on markets, processor links; organic modules in schools, higher education; identify sector training needs; apprenticeships	y: specific technical issues in aquaculture	z: sector-focused (incl. aquaculture) market research, supply statistics, financial assessments; related software development
IT	C	i: reverse recent decreases and promote increased consumption (organic for all) as part of nutrition and food education and through information campaigns; evaluation of outcomes; national organic event; participation in competitions; national information system	j: focus on development of organic livestock production and aquaculture; increase number of recipients of RDP AKIS measures; develop internet platform for advice and education in SINAB; support for advisory services	k: see advice and demonstration; establish roundtable for professional development training; multi-annual training plans to develop competence levels among advisers, trainers, inspectors and officials	l: preparation of information and research on production, processing and marketing of organic products to better meet market needs, consumer expectations; improve sustainability of organic systems through research, innovation and knowledge exchange; develop national research and innovation plan; specific research on agronomic and agroecological topics; nutrition, plant protection, plant and animal breeding; animal nutrition; financial viability of livestock systems; markets for organic products and consumer expectations	m: improvement of statistical data for market transparency; research projects incl. national information system SINAB; enhanced data requirements under EU-SAIO-Regulation; production of regular reports on sector development; annual reports summarizing key trends; improved identification and document of certified and supported land areas

Table 9.4j: Comparison of current/planned and previous information-related organic action plan measures in IT (P), LU and LV

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
IT	P	v: increase awareness of benefits of organic farming as part of communication campaigns, integrating with other initiatives; use of SINAB website as information portal also for consumers	w: RDP support for advisory services; digital approaches to improving information availability and access to databases; establish working group to co-ordinate publication of technical information	x: RDP support for training modules; courses in universities; support for PhD studentships; research staff training	y: roundtable on research topics at universities; develop national plan for participatory research and innovation, with government research institutes and reflecting socio-economic realities facing sector; establish permanent co-ordination committee for research and innovation (EIP operational groups)	z: digitalisation of organic sector data and processes (SIB); improved interaction with international systems and databases; full integration with regional systems
LU	C	i: increased visibility and better communication in relevant institutions, covering all audiences; development and implementation of communications strategy	j: development of new approach to management of demonstration farms; improve system of conversion advice; explore options for supporting specialist advice; improve organic awareness in general farming	k: introduce compulsory organic modules in agriculture courses; improve continuing professional development options for producers, processors, traders and advisers	l: concept for collation and application of research findings, as basis for future priorities; decision support for local seed and transplant production; increased organic research; study on true cost accounting; role of organic in food systems policy	m: stocktake of current status of organic farming in LU (data and studies)
	P	v: where to buy organic guide; organic fair; organic farm awards;	w: conversion to organic farming guide; publication on grain legumes; guide to advice; organic field days; demonstration farms	x: conversion to organic farming courses; course materials for agricultural training institutes; study tours (weed control, cattle, viticulture)	y: research trials on potatoes, soya; malting barley; technical guides; sustainability assessment using SMART farm tool	z
LV	C	i: public education, information, promotion initiatives incl. bioregion	j: individual, group advice; information seminars, conferences	k: access to education and training for producers, processors, other professionals; incl. organic in vocational/ higher education courses;	l: enhance genetic biodiversity and productivity; research/ innovation projects; international networking; assess climate, environmental impacts; develop organic aquaculture; control invasive species	m: digital data exchange; data available for sector strategies, individual business planning, reporting to EU Commission

Table 9.4k: Comparison of current/planned and previous information-related organic action plan measures in MT, NL and PL

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
MT	C	i: promotional activities to increase awareness and demand for organic food, including low-trophic and aquaculture; strengthen role of Ambassador for organic, sustainable food; biodistrict and biotrail pilot projects	j: provide advisory and mentoring services for organic farming; invest in advisory, knowledge and information systems (AKIS) for organic sector	k: provide training in organic farming, including as part of agriculture courses	l: establish R&D activities as part of AKIS initiative	m: collect, analyse and disseminate data on the organic food sector
NL	C	i: increase awareness of organic products and EU organic logo; review presentation with retailers; communicate sustainability benefits	j: establish national helpdesk to inform producers on conversion issues; encourage knowledge exchange with other (non-organic) sectors, e.g. nature-friendly, regenerative; use of farm advisory service (SABE) for conversion advice and business planning	k: identify opportunities to better disseminate existing knowledge and enhance education; green knowledge network; enhance training of advisors and availability of organic courses	l: explore options for increasing focus of organic sector on nature, biodiversity; inventory of knowledge, innovation needs for production, consumption; agenda setting; research projects; review alignment with innovation policy; EU research links, e.g. living labs, CORE Organic Pleiades network; use field labs, EIP operational groups to support innovation	m: market research on how food services can contribute to increased sales
PL	C	i: information, promotion campaigns, supported by organic organisations; development of central portal for consumers to find information, engage with organic producers	j: advice, demonstration of best practice, also for aquaculture; network of demonstration farms; development of regional advisory units for organic, environment	k: inclusion of organic courses in agricultural colleges; specialist training courses; information resources for new converters	l: multi-annual research programme and dissemination actions, e.g. conferences, input to training courses, literature; focus on organic production, processing practices, inputs; research agenda to be agreed with sector	m: information on alternative marketing channels
	P	i: increase consumer awareness, also children, young people; information on characteristics, benefits of organic; media campaigns; co-operation with organic sector organisations	j: support knowledge transfer through effective advisory services for producers, processors, network of demonstration farms; strengthen co-operation between advisory and research institutions	k: development of information resources on good practice; organization of courses, workshops	l: research projects to improve organic practices in production and processing, anticipating future changes in organic regulations; prioritise young animals, animal nutrition; avoiding contamination with prohibited inputs, organic seed; plant protection;	m

Table 9.4I: Comparison of current/planned and previous information-related organic action plan measures in PT, RO and SE (C)

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
PT	C	i: increase consumer trust through public information campaigns relating to certification process, EU logo; promotion campaigns in media, social networks; national organic day; mobile apps to identify outlets	j	k: appropriate training, educational courses; improve existing competence standards; improved technical information availability	l: support for research, development incl. trials, demonstration field network; involvement of national research institutions; links to TP Organic platform; involvement of organic sector in national research agenda setting; establishment of centre for organic production; database on relevant research	m: Improve statistical information; increase market knowledge to improve product supply, esp. meat, olive oil; conduct market studies; establish market observatory; reduce regulatory constraints for organic aquaculture;
RO	C	i: advertising, communication and information on EU regulations and logo; support for public debates and festivals; thematic events; research on environmental sustainability and health benefits relevant to consumers; support for organic districts; national organic day 15/10; education on nutrition in schools; information for young consumers; farm visits	j: expansion of advisory centres; easier access to advice and practical demonstrations; network of demonstration farms; information exchange between farmers on best practices; RDP AKIS measures; initiatives to support transfer of research results into practice	k: modules and programmes in agric. schools and universities, in partnership with stakeholders; support for workplaces on organic farms; training courses for farmers, processors etc.; regional training centres	l: resource efficiency, packaging and waste reduction; dissemination of national and international results; prioritise producer-relevant research, incl. env. friendly approaches, plant breeding, animal breeds; EIP operational groups; joint funding of projects with producers and organisations; Horizon Europe engagement	m: market studies; data on RO organic production and processing; including suitable databases, websites and search engines; annual survey of consumer understanding
SE	C	i: clarify best communication options; create web-portal for factual, impartial information on organic production methods, rules and impacts; encourage projects to improve dialogue between farmers and consumers	j: business development support; strengthen advisory services nationally and for specific sectors; knowledge-raising information campaign aimed at food chain actors	k: school and higher education to stimulate interest to address labour shortages; training for farmers and advisers	l: invest in research, development and innovation; focus on solutions to technical problems; double research funding	m: quality-assured, statistical follow-up; ensure long-term funding for collection, reporting of statistics, market information incl. public sector; business planning data

Table 9.4m: Comparison of current/planned and previous information-related organic action plan measures in SE (P), SI and SK

Country	Action plan	9. Consumer Information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
SE	P	v: more active consumers; improve in-store communication; factual consumer information; promote recreational/urban growing	w: information campaign to stimulate conversion; webinars and seminars for processing companies	x: higher education in organic production, markets, consumption targeting all professional actors	y: dissemination of knowledge on animal health care; research, innovation for sustainability; focus on applied research; continuous monitoring of environmental impacts of production systems, methods and related payments	z: compilation of statistics; formulate forecasts; assess current markets; benchmarking international developments
SI	C	i: support establishment of organic gardens in educational institutions; SI organic food day	j: upgrade advisory system, integrating other stakeholders; establish demonstration farm networks; mentoring programme	k: strengthen knowledge, skills, innovation; mandatory training for organic farmers; voucher scheme for farmers to obtain training from different providers; priority to address labour shortages, increase volunteering; support adviser training; explore options for increasing organic content in school curricula; specific higher education initiatives	l: increase R&D funding; dissemination of research results in professional, non-academic format; participation in research programmes and EIP operational groups; funding for participation in CORE-Organic network	M: accurate data collection on product availability for processing, catering; analyses of the SI organic market
	P	v: raise public confidence in organic food; raise awareness of environmental, health benefits; promotion campaigns	w: include organic in restructured advisory system; promote specialist farms, demonstration centres; training of advisers; extend Chamber of Agriculture activities	x: include organic in training, education system; further training for organic farmers and processors; school teacher training on health, nutrition	y: promote research in organic farming; identify needs; include in applied research and interdisciplinary projects	z: ensure access to market data
SK	C	i: increase consumer awareness, promotional activities; focus on sustainability; media and social networking actions; sustainable consumption for all	j: secure advice; establish demonstration farms, focus on technology, innovation; communication of standards and certification procedures	k: secure training; information for producers considering conversion; organization of training courses, knowledge exchange between farmers, international experiences	l: develop research; strengthen, integrate research capacities; living labs; field trials in crop, animal production; multi-disciplinary research in natural, social sciences; dissemination of results to farmer, others	m: extend organic database; analyse, publish data;



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Table 9.4n: Comparison of current/planned and previous information-related organic action plan measures in EU, CH and NO

Country	Action plan	9. Consumer information	10. Advice, demonstration	11. Training, education	12. Research, Innovation	13. Statistics, market data
EU	C	i: promote organic farming via CAP information measures, data on environmental, economic, social benefits; events, awards incl. annual EU organic day	j: strengthen use of CAP farm advisory services to support advice; EU demonstration farm networks, e.g. climate-positive holdings; equivalent initiatives for aquaculture	k: promote exchange of best practice for curricula, courses, material etc.; innovative solutions targeting production, processing, retailing, consumption; equivalent initiatives for aquaculture	l: promote best practices, synergies with EIP operational groups; equivalent initiatives for aquaculture; research to improve animal nutrition (vitamins, proteins), incl. aquaculture; research to reduce climate, environmental footprint, enhance genetic biodiversity, increase yields, find alternatives for contentious inputs e.g. copper; further improve animal welfare; more efficient use of resources, incl. plastic alternatives, water, energy, nutrients	m: develop sector analysis for market transparency; regular reports using Eurostat data; annual reports on imports; intensify collection of market data with MS; extend role of EU Market Observatories to include organic
	P	v: include organic as theme in CAP information measures; consumer information and promotion	w: increase MS awareness of synergies with other CAP measures	x: increase MS awareness of synergies with other CAP measures	y: conference to identify research, innovation priorities; strengthen opportunities for organic work in Horizon 2020 and Era-nets;	z: regular reports on organic production; analysis of value added in supply chain; analysis of obstacles to organic uptake
CH-AG	P	v	w	x: include organic food in professional training programmes, incl. for apprentices and teachers	Y	z
NO	C	i: consumer information; Food Nation Norway	j: support advice and skills development through Norwegian advisory service; focus on products in demand	k: educational opportunities in schools, vocational and higher education to contribute to skilled workforce	l: support research, development and innovation; address specific technical issues; involve all parts of supply chain	m



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