BELGIUM

ORGANIC SECTOR FACTSHEET

PRODUCTION/MARKET TRENDS & POLICIES

KEY INDICATORS

With 103'437 hectares (2022), Belgium had an organic area share of 7.6%, thus below the European Union average of 10.6%. Organic farmland increased by 360% from 2001 to 2022, slightly faster than the European Union average of 282%. Regarding organic retail sales, organic food worth 995 million euros was sold in Belgium in 2022, constituting 3.7% of all retail sales.

ORGANIC FARMLAND	2001	2022
Area* (Share of Total Farmland)	22,452 ha (1.5%)	103,437 ha (7.6%)
Area Growth from 2001 to 2022	360.1%	

ORGANIC LAND USE & AQUACULTURE	2001	2022
Arable Land* (Share of Total)	3,137 ha (0.5%)	39,284 ha (4.5%)
Permanent Crops* (Share of Total)	330 ha (2.0%)	1,599 ha (7.4%)
Grassland* (Share of Total)	18,796 ha (3.6%)	62,554 ha (13.2%)
Aquaculture Production (Share of Total)	N/D	N/D

ORGANIC OPERATORS	2001	2022
Producers (Share of Total)	694 (1.1%)	2,638 (7.3%)
Aquaculture Producers	N/D	N/D
Processors	620	1,881
Importers	63	365

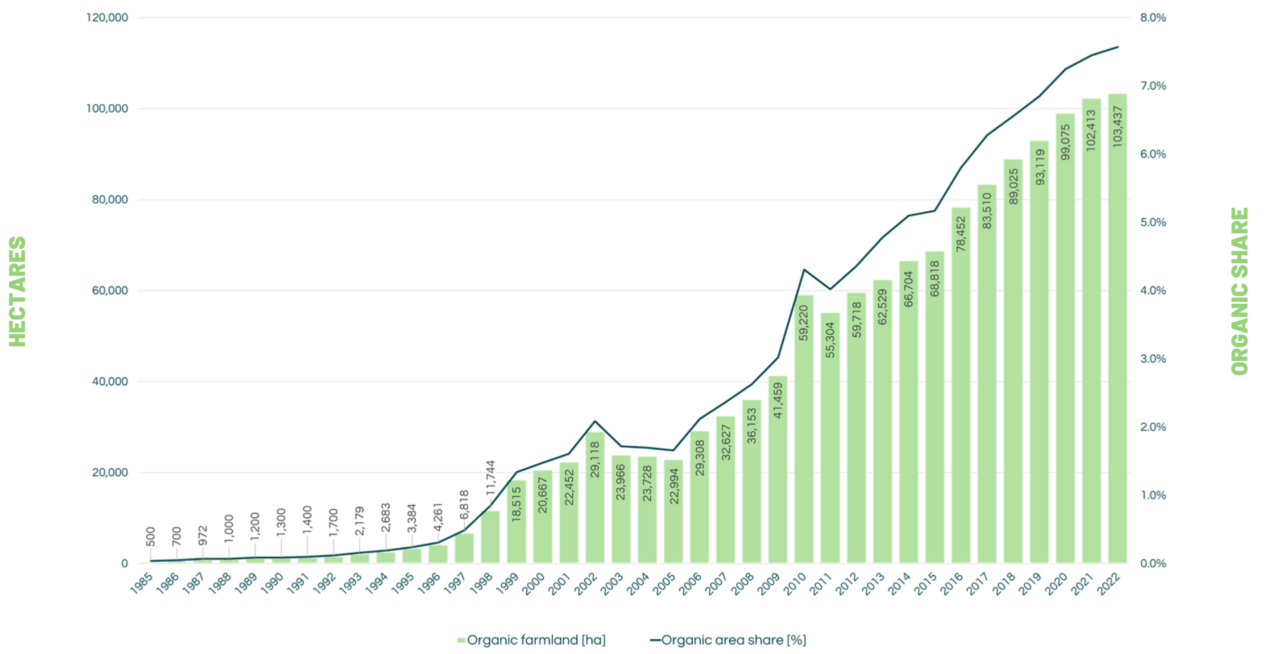
ORGANIC RETAIL SALES	2001	2022
Retail Sales (Share of Total)	125 M €	995 M€ (3.7%)
Per Capita Consumption	12.2 €	84.3 €
Retail Sales Growth from 2001 to 2022	664 %	
Imports	N/D	268,462 MT

Source: FiBL survey based on national data sources, Eurostat and TRACES/European Commission in the framework of the OrganicTargets4EU project

**In conversion and fully organic*

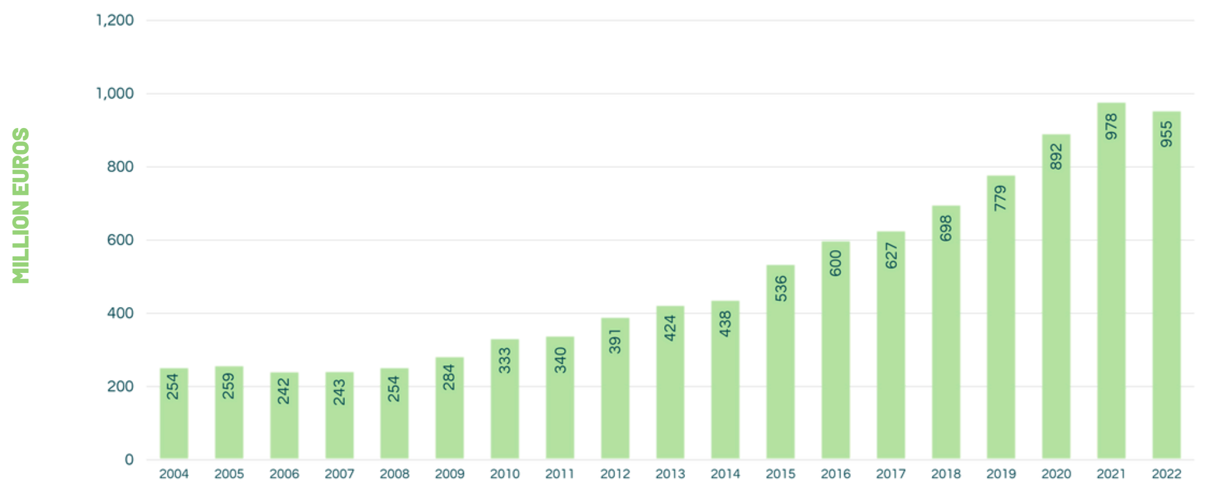
KEY INDICATORS

DEVELOPMENT OF ORGANIC FARMLAND IN BELGIUM



Source: FiBL-AMI Survey based on Eurostat, LV, Biowallonie, Nic Lampkin

DEVELOPMENT OF ORGANIC RETAIL SALES IN BELGIUM



Source: FiBL-AMI Survey based on national data sources, LV, Biowallonie

CAP ORGANIC POLICY SUPPORT

Belgium is the only EU Member State to have separate regional CAP Strategic Plans, for Flanders and Wallonia. Some combined results for the two regions are presented here, but the emphasis on organic farming is very different in the two regions, with Flanders aiming to support 5% of its agricultural area as organic by 2027, and Wallonia 18%, giving a combined average of 12%, double the 2018 supported area. Flanders has introduced a flat-rate, P1-funded maintenance scheme, involving substantial reductions in payments per ha, especially for horticulture and fruit production. At the same time, conversion payments have been increased substantially, resulting in values several multiples of the maintenance payment. Wallonia has increased some payments, but rates for horticulture have fallen. Wallonia pays a flat rate €150/ha extra during conversion, both in the current and previous periods. The overall effect is an increase in average expenditure per ha and a substantial increase in total expenditure.

CONVERSION & MAINTENANCE	2018	2027
Land Area Supported (Change from 2018)*	80 kha	163 kha (+105%)
Share of Total Agricultural Area Supported*	5.9%	12% (+104%)
Share of Certified Organic Area Supported (Change)*	89%	N/D
Expenditure per Year*	19 M€	46 M€ (+138%)
Expenditure per Hectare Supported*	243 €	281 € (+16%)

SHARE OF CAP RESOURCES	CAP EXP. 2023-2027	ORGANIC SHARE*
Organic Farming Support (P1/P2)*	160 M€	100%
Eco-Schemes (P1)	606 M€	16.4%
Agri-Environment, Climate, Welfare (P2)	368 M€	
Total CAP Expenditure	3,831 M€	4.2%

P1 for maintenance in Flanders from 2023

**including in-conversion and fully organic land*

CAP ORGANIC CONVERSION AND MAINTENANCE PAYMENTS FOR DIFFERENT LAND USES

INDICATOR	YEAR	FUND	GRASSLAND	ARABLE CROPS	HORTICULTURE	FRUIT CROPS
Conversion Support (€/ha)	2019	F:P2 | W:P2	F:300 | W:350	F:480 | W:550	F:850 | W:1050	F:860 | W:1050
	2023	F:P2 | W:P2	F:390 | W:365	F:900 | W:585	F:1700 | W:585	F:1700 | W:1110
Change from 2019 to 2023			F:+30% | W:+35%	F:+88% | W:+6%	F:+100% | W:-45%	F:+100% | W:+6%
Maintenance Support (€/ha)	2019	F:P2 | W:P2	F:120 | W:200	F:260 | W:400	F:400 | W:900	F:210 | W:900
	2023	F:P1 | W:P2	F:118 | W:215	F:118 | W:435	F:118 | W:435	F:118 | W:960
Change from 2019 to 2023			F:-1% | W:+7%	F:-55% | W:+9%	F:-70% | W:-52%	F:-44% | W:+7%
Conversion Support Higher than Maintenance	2019	F:P2 | W:P2	F:+231% | W:+150€	F:+85% | W:+150€	F:+113% | W: +150€	F:+310% | W: +150€
	2023	F:P2/1 | W:P2	F:+231% | W:+150€	F:+663% | W:+150€	F:+1341% | W: +150€	F:+1341% | W: +150€

F: Flanders; W: Wallonia; Fund: P1 (Pillar 1) European Agricultural Guarantee Fund (EAGF); P2 (Pillar 2) European Agricultural Fund for Rural Development (EAFRD) and national co-financing

Sources for pages 3, 4 and 5

Lampkin N, Lembo G, Rehburg P (2024) Assessment of agricultural and aquaculture policy responses to the organic F2F targets. OrganicTargets4EU project Deliverable 1.2. Braunschweig: Thünen-Institut.

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NATIONAL ORGANIC ACTION PLAN

As with the CAP Strategic Plans, there are separate action plans in Flanders and Wallonia with different targets, in part reflecting the dominant land uses in each region, with more arable land in Flanders. Flanders has had a total of five organic action plans since 2000, Wallonia's first was in 2013.

TARGETS - FLANDERS

	PERIOD	LAND AREA TARGET*	OTHER TARGETS
Previous Action Plan	2018-22	> 1.1% of UAA by 2022	-
Current Action Plan	2023-27	5% of UAA, farms and livestock by 2027	5% of market and procurement by 2027

KEY ACTIONS - FLANDERS

	PREVIOUS ACTION PLAN (2015 - 2022)	**CURRENT ACTION PLAN** (2023 - 2030)
PRODUCTION	CAP support	CAP support
MARKETS	More by-product value added; organic clusters to balance supply, demand; more information on public procurement, catering and tourism; quality standards for processors; implement EU organic regulation	Focus on local products to reduce imports; organic clusters to engage more businesses; increase transparency and co-operation in supply chains; increase public procurement to 5%; more information on catering, tourism; expand export opportunities; strong control system; support for certification costs
INFORMATION	School activities; demonstration farms; farmer knowledge exchange networks; mentoring of farmers in conversion; inclusion of organic topics in agricultural courses; practical research and dissemination; EIP operational groups; provide financial and sector-specific market data	Increase consumer information, awareness of and trust in benefits of organic; media coverage; school activities; specific conversion advice and training, introductory courses; information and advice for supply chain; information portal; training for all levels of supply chain; include in agriculture and horticulture courses; strengthen research and dissemination networks; integration of agroecology and living labs; expand network of beacon farms; extend international engagement; statistical data collection including prices; monitoring of action plan results; annual report

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TARGETS - WALLONIA

	PERIOD	LAND AREA TARGET*	OTHER TARGETS
Previous Action Plan	2013-20	14% of UAA by 2020	3% of market by 2020
Current Action Plan	2021-30	30% of UAA by 2030	15% of market by 2030

KEY ACTIONS - WALLONIA

	PREVIOUS ACTION PLAN (2013 - 2020)	**CURRENT ACTION PLAN** (2021 - 2030)
PRODUCTION	CAP support	CAP support; new support in water catchments
MARKETS	Funded strategy for marketing local products; strengthen supply chains, producer groups; restructure organic organisations and networks; develop public procurement including training; harmonisation of terms used by control bodies	Supply chain support initiatives; support for groups; co-operation with extra-regional partners; engagement with school milk, fruit programmes; support for organic restaurants including certification; support for trade fair participation and marketing tools; checklists for self-assessment; improved controls for processing including aspects not part of EU regulation
INFORMATION	Information, advice targeting farmers considering conversion and other professionals; emphasis on organic in agriculture courses; restructure and build research capacity; stocktake of completed research; international research co-operation; improvement of data available for business decision-making	Web portal targeting all user groups; consumer promotion activities, local product focus; increased media activity with evidence-based messaging; information resources for professionals, encourage more engagement from advisory organisations; include in agricultural training courses; training of advisers; support for farms offering training places; development of materials; jobs fair and videos for graduates; media training for businesses; development of research and integration with regional, national, international networks; development of data system for organic farming in Wallonia with reporting

AQUACULTURE

The organic share of total aquaculture production in Belgium is over 5%. Belgium was not included in our analysis of the EMFF (2014-2020) and EMFAF (2021-2027) operational programmes and the Multi-annual National Strategic Plan for Aquaculture. Aquaculture is not specifically mentioned in either the Flanders or Wallonia action plans. As the funding, if any, is project specific and there is no ring-fenced organic budget, statistics on organic aquaculture support expenditure are not available.

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