Deliverable D4.2

Report on Delphi expert interviews on value chain changes and business strategies

REPORT/PUBLIC

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Summary

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Finally, we would like to thank sincerely all the experts who have granted from their time: their thoughts and their forward - looking ideas to support agricultural development biological are the subject of this report. If they remain anonymous in this report, they will recognize themselves.

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List of abbreviations

AKIS Agricultural Knowledge and Innovation Systems (network of agricultural research stakeholders)
ANIA Association Nationale des Industries Alimentaires (French National Association of Food Industries
AOL Assoziation ökologischer Lebensmittelhersteller (German Association of Organic Food Producers)
ASC Aquaculture Stewardship Council
ASSOBIO Italian union of organic agri-food companies
AU Austria
CAP Common Agricultural Policy
CFP Common Fishery Policy
DE Germany
DK Denmark
EMFAF European Maritime Fisheries and Aquaculture Fund
EU European Union
FAO Food and Agriculture Organization of the United Nations
FNAB French National Federation of organic agriculture
F2F Farm to Fork Strategy
FR France
GHG Greenhouse gases
GMO Genetically Modified Organisms
GR Greece
IMTA Integrated MultiTrophic Aquaculture
IT Italy
OF Organic Farming
OHC Out-of-home Catering
SYNABIO French union of organic agri-food companies
UAA Useful Agricultural Area
VAT Value Added Tax
WP Work Package

Executive Summary

With the Farm-to-Fork Strategy, the EU has set targets of reaching at least 25% of the EU's agricultural land under organic farming and significantly increasing organic aquaculture by 2030. The Horizon Europe project "OrganicTargets4EU" develops in a multi-actor approach options and policy recommendations to support the achievement of these targets.

Based on an assessment of key drivers and lock-ins affecting the development of the organic sector, the project develops possible scenarios for achieving the targets set by the EU. The socio-economic impacts of the expansion of organic farming on agriculture, value chains and the organic market are analysed. Furthermore, the project provides evidence on the mechanisms that can drive demand for organic food and the impact of changing diets and food waste reduction on mitigating the reduced yields from organic production.

This deliverable results from Task 4.3 "Understanding market actor behaviour" analysis of the Delphi interviews with European experts downstream the value chain. Task 4.3 aims to provide information on the effectiveness of organic market development by the players in the value chain, and to analyse the socio-economic impact of achieving the Farm-to-Fork (F2F) objectives on processing, retailing and consumption. Task 4.3 is part of WP4 "Socio-economic impact on the market side", which aims to assess the socio-economic impacts of the scenarios at the level of markets and value chains and identify market mechanisms for stimulating the increase of organic demand. In WP4, also the socio-economics effects linked to consumer demand (Deliverable D4.1 Report on assortment change and active marketing effects on demand pattern) are assessed.

The questionnaire used for the interviews was based on the foresight scenarios developed in WP2 "Participatory foresight and scenario analysis". Two rounds of interviews were carried out so that during the second round experts could react to each other's answers and opinions. These interviews allowed to explore the points of view of actors downstream the food chain on the development of the organic sector, their expectations in terms of demand and market development, supply chain structure and the obstacles and levers to the development of organic. Participation in this study gave experts the opportunity to discuss the impacts of increasing organic agricultural production within the food value chain, facilitating the exchange of ideas while avoiding the challenges of direct interactions between experts.

Between March and the end of June 2024, 29 European experts on the downstream end of the food chain, food processing, distribution, catering and market research were interviewed across 8 target countries: Italy, Germany, Denmark, France, Austria, Hungary, Romania and Greece (Linked Milestone MS10 Delphi-interviews held). Five experts who participated in the first round were not available for the second round of interview but provided their inputs in written form. Following these interviews, ITAB, Task 4.3 leader, analysed the experts' contributions to identify the changes expected in the food sectors and in organic farming development strategy.
The analysis of expert opinions and recommendations revealed that while voluntary actions dominate and align with a demand-driven (Pull) scenario, the importance of European and national public policies remains significant. The experts consistently emphasized that a balanced approach combining financial measures, regulatory constraints, and incentives is essential for the effective development of the organic sector. Prominent recommendations include regulations on green labelling and ecological claims, increased transparency in market margins, differentiated VAT, and policies favouring organic products in public catering. These measures,

coupled with targeted CAP aid, could create a robust framework for organic farming development. The findings underline that coordinated efforts between governments, retailers, and other stakeholders can build on existing practices, such as promotional campaigns already conducted for other products, to further strengthen the organic sector's growth and consumer trust.

For organic aquaculture, the role of European and national public policy remains pivotal in overcoming both regulatory and technical barriers. Stakeholders highlighted the need for innovative governance mechanisms that prioritize sustainability and equity across the value chain. Financial support through the European Maritime, Fisheries and Aquaculture Fund (EMFAF) should be reinforced to account for the unique investments required for organic certification. Addressing technical challenges, such as the lack of organic juveniles, feed ingredients, and mechanisms for supporting organic products throughout the value chain, is equally crucial. Enhanced communication campaigns to raise consumer awareness and increased budgets for public procurement of organic seafood could demonstrate genuine political commitment to developing a fully organic food system.

1. Introduction

With the Farm-to-Fork Strategy, the EU has set targets of reaching at least 25% of the EU's agricultural land under organic farming and significantly increasing organic aquaculture by 2030. To achieve the ambitious targets, the organic market, along with organic agriculture and organic aquaculture production, needs to undergo substantial growth. This study aims to draw a complete panorama of the socio-economical context by understanding the market behaviour and the actions which could be taken by downstream chain stakeholders in contribution to the Farm-to-Fork targets for organic by answering the following research question:

"How can changes be implemented downstream the food supply chain to promote the development of organic agriculture by 2030 in Europe?"

The qualitative expert Delphi interviews was used to analyse the socio-economic impact on value chain actors and structure and to understand the constraints on market expansion. The questionnaire used for the qualitative Delphi interviews considered the work carried out in WP2 "Participatory foresight and scenario analysis" and the four scenarios developed. All scenarios lead to a 25% share of organic land in the EU by 2030 and were defined based on contrasting and alternative storylines and assumptions, that serve to represent a variety of future possibilities (Figure 1). The highlights and differences of the four scenarios are summarised below:

Push scenarios: Public Policy Drives Organic Growth

Green Public Policy scenario

- Public concern for the environment shapes EU policies, making organic farming the most attractive option for farmers, especially for crops.
- Public support through the CAP incentivizes organic practices and reduces livestock intensity. It also helps maintain grazing herds for biodiversity.
- A strong, public-backed organic label ensures consumer confidence despite competition from alternative standards. However, fluctuating private demand due to alternative standards can impact the farmers' share of the final price.
- Public institutions buying organic create a stable market, even if consumer demand fluctuates and price premia may reduce.

Divergent Pathways for the Organic Sector scenario

- Environmental policies lose priority amid concerns over food security, inflation, and farmers' reduced profitability, sidelining the Green Deal and fostering social fragmentation.
- While some regions maintain strong organic policies supported by public engagement, other countries withdraw support, leading to a polarised agricultural sector.
- NGOs and private sector sources drive innovative solutions within organic supply chains, aligning practices with market demand in regional hubs and urban centres.
- Organic districts highlight a multifaceted approach, with stable price premiums and strategic exports to high-demand areas, despite ongoing challenges in the sector.

Pull scenarios: Consumer Demand Fuels Organic Boom

Organic on Every Table scenario

- Consumer desire for healthy, sustainable food is driving a market boom for organic products, led by big business.
- The trusted organic label pushes supermarkets, restaurants, and schools to offer more organic options.
- Major retailers and processors are expanding organic offerings and directly entering the supply chain. Increased competition shrinks the price gap between organic and conventional products, further fuelling consumer demand, but can also put pressure on farmers' share of the final price.
- Investment in the organic sector helps farmers convert and expand production, but the impact on their share of the final price depends on negotiation power within the market. Farmers' cooperatives/networks and stronger bargaining power can help ensure a fairer share of the final price for producers.

Organic Power to the People scenario

- European citizens face challenges from climate change and biodiversity loss, while mainstream lobbies push New Genetic Technologies (NGTs) for conventional foods.
- The private financial sector supports organic farmers with credit lines, driving organic conversion and increasing farm-gate prices.
- NGOs and civil society groups advocate for fair supply chains, while national and regional governments fund organic farming through public procurement policies.
- Despite European inaction, grassroots movements and local governments are advancing organic agriculture to tackle climate, health, and resource issues.

Both the convergent and divergent opinions of the experts are considered in the analysis of the dynamics necessary to the supply chain transformations in support of the organic farming development. The choice of the term "how" in the research question makes it possible to highlight not only the obstacles and levers, but also the specific modalities by which these changes could take place. This includes the analysis of potential scenarios of structural changes, market trends, and strategies of supply chain actors, thus offering an overview of the dynamics that, according to the experts, could facilitate or hinder the development of organic farming in Europe by 2030.

		PUSH - POLICY DRIVEN			PULL - DEMAND DRIVEN		
	DRIVER	STATE 1	STATE 2	STATE 3	STATE 1	STATE 2	STATE 3
MEGA TRENDS	Political climate towards OF	Green Deal cancelled	Green Deal stalled	Green Deal +	Green Deal cancelled	Green Deal stalled	Green Deal +
	Water availability for farming	Water conflicts	Mixed corporate-public governance of water	Circularity and regulated water	Water conflicts	Mixed corporate-public governance of water	Circularity and regulated water
CONSUMERS PERSPECTIVE	Competition from alternative standards	Mainstream agriculture revival	Entropy of standards	Organic primacy	Mainstream agriculture revival	Entropy of standards	Organic primacy
	Food scares	Organic scandals	No pain, no gain	Conventional food scandals	Organic scandals	No pain, no gain	Conventional food scandals
	Sustainable and healthy diets	Going junky	Healthy but Grey	Healthy & Green	Going junky	Healthy but Grey	Healthy & Green
SUPPLY CHAIN	Large retail chains involvement	Fragmented supply	Networking	Big is better	Fragmented supply	Networking	Big is better
	Organic public procurement	Organic demand stays private	Fragmented public procurement	Public procurement boost	Organic demand stays private	Fragmented public procurement	Public procurement boost
POLICY	Eco-schemes, national/ regional policies OF	Unfavourable CAP	Neutral CAP	Favourable CAP	Unfavourable CAP	Neutral CAP	Favourable CAP
	NGT in OF	NGT liberalisation	NGT only in conventional	NGT-free EU	NGT liberalisation	NGT only in conventional	NGT-free EU
	Subsidised credit for OF/processor	Credit crunch for organic farmers	Credit lines for organic farmers	Organic finance	Credit crunch for organic farmers	Credit lines for organic farmers	Organic finance
FARMERS PERSPECTIVE	Conversion of arable farming systems	Concentrated growth	Lagger countries catching up	Widespread uniform conversion	Concentrated growth	Lagger countries catching up	Widespread uniform conversion
	Conversion of livestock systems	Concentrated growth	Lagger countries catching up	Widespread uniform conversion	Concentrated growth	Lagger countries catching up	Widespread uniform conversion
	Farm-gate relative prices of OP vs CP	No more premium	Uneven premiums	Premium prices are there to stay	No more premium	Uneven premiums	Premium prices are there to stay
AKIS	Capacity building in organic NGOs	Fragmented NGOs	Few EU/National strong lobbying	Development of Organic NGOs	Fragmented NGOs	Few EU/National strong lobbying	Development of Organic NGOs
	Training and education for OF	Organic AKIS stay marginal	Common AKIS for farming	Knowledge boost in OF	Organic AKIS stay marginal	Common AKIS for farming	Knowledge boost in OF

Figure 1 - Summary table of key factors and storylines of the four scenarios: Green Public scenario (green), Divergent Pathways for the Organic Sector (red), Organic on Every Table (yellow), Organic Power to the People (blue). Source: OrganicTargets4EU, UNIVPM

European Organic context

In 2019, the Utilisable Agricultural Area (UAA) cultivated organically represented 8.5% of the EU's UAA. In this period for organic farming, European UAA increased by 5.4% in just one year. The organic UAA continued to grow further in 2020 as did the consumption of organic products which amounted to 50 billion euros (Agence Bio 2021). The last data of Eurostat for 2022 (Eurostat 2022) indicate that organic UAA reached 16.9 million hectares, equivalent to 10.5% to the total UAA.

The European countries with the largest shares of organic farming in their agricultural area are Austria (27%), Estonia (23%) and Sweden (20%).

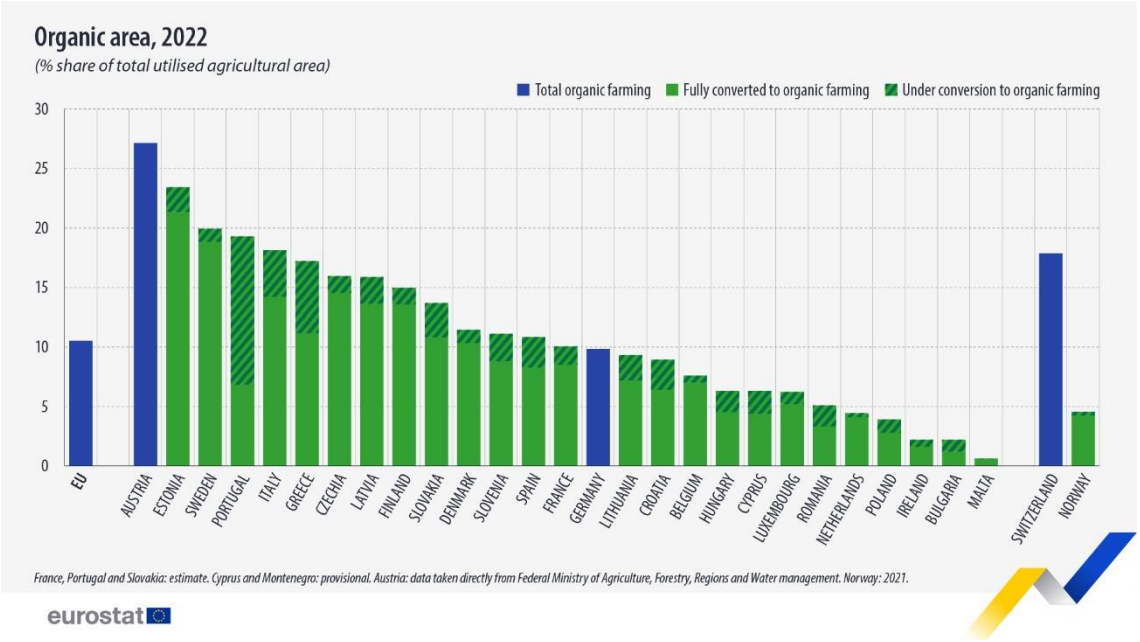

Figure 2 – Organic area in Europe in 2022 (Eurostat, 2022)

In 2022, organic areas in Spain represented 15.8% of European organic UAA, whereas France was placed in 1st position and represented 17% of European organic UAA. Although it is high in the ranking in terms of UAA, the share of its territory cultivated organically placed it 14th in the ranking in 2022 with 10% of its UAA organic. Austria, for its part, had 27% of its UAA in organic in 2022, it is the best student in the EU.

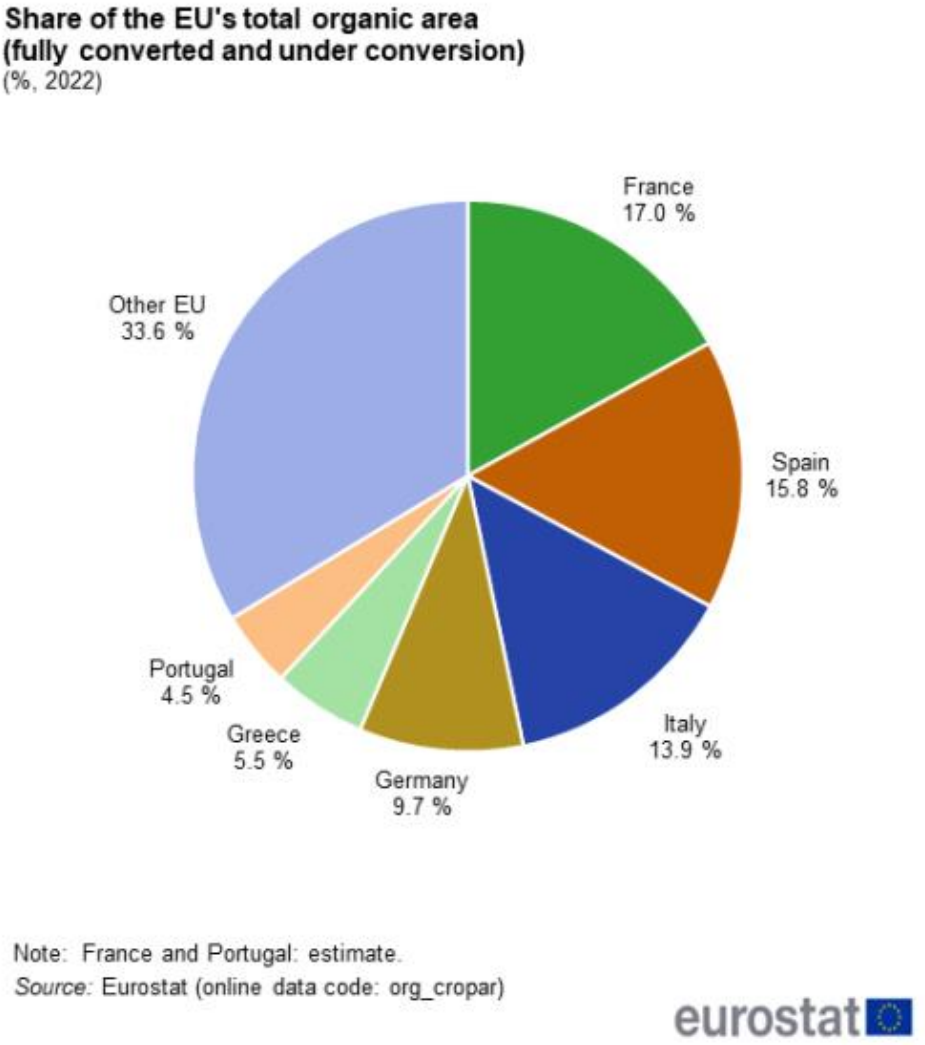

Figure 3 – Share of the EU's total organic area in 2022 (Source: Eurostat)

Total organic area (fully converted and under conversion), by country, 2012 and 2022

	Organic area (ha)		2012–22
	2012	2022	(% change)
EU	9 457 886	16 898 463	78.7
Belgium	59 718	103 437	73.2
Bulgaria	39 138	110 441	182.2
Czechia	468 670	563 527	20.2
Denmark	194 706	300 057	54.1
Germany	959 832	1 630 984	69.9
Estonia	142 065	231 011	62.6
Ireland	52 793	95 701	81.3
Greece	462 618	924 853	99.9
Spain	1 756 548	2 675 331	52.3
France	1 030 881	*2 875 500*	*178.9*
Croatia	31 904	129 374	305.5
Italy	1 167 362	2 349 475	101.3
Cyprus	3 923	7 749	97.5
Latvia	195 658	312 820	59.9
Lithuania	156 539	271 329	73.3
Luxembourg	4 130	8 255	99.9
Hungary (1)	130 607	320 517	145.4
Malta	37	66	78.4
Netherlands	48 038	80 086	66.7
Austria (2)	533 230	705 800	32.4
Poland	655 499	554 632	-15.4
Portugal	200 833	*759 977*	*278.4*
Romania	288 261	644 520	123.6
Slovenia	35 101	53 202	51.6
Slovakia	164 360	*253 156*	*54.0*
Finland	197 751	339 459	71.7
Sweden	477 684	597 204	25.0
Iceland (3)	:	4 982	:
Norway	55 260	46 006	-16.7
Switzerland	121 213	185 224	52.8
Montenegro	:	3 966	:
North Macedonia	:	8 724	:
Albania	:	:	:
Serbia	:	:	:
Türkiye	:	310 584	:

Note: (:) data not available. Italics: estimated and provisional data.
(1) Break in time series, 2022.
(2) Austria: 2022 data taken directly taken from Federal Ministry of Agriculture, Forestry, Regions and Water management.
(3) Iceland: 2020 data instead of 2022.
Source: Eurostat (online data code: org_cropar)

eurostat

Figure 4 Total organic area (fully converted and under conversion), by country, 2012 and 2022 (Eurostat, 2022)

Over the last 10 years, the EU has made significant progress toward its goal of having 25% of UAA grown organically by 2030. The latest figures from IFOAM (Willer, Trávníček et Schlatter 2024) show a European organic UAA of 10.4%. In 2021, organic farmland in the EU expanded by approximately 0.8 million hectares, reaching a total of 15.6 million hectares. This growth reflects a 5.2% increase from the previous year (Helga Willer 2023). However, further efforts are needed to bridge the remaining gap.

After a very strong year in 2020 for organic products during which the market grew of about 15%, 2021 saw slower growth, with retail sales of organic products in supermarkets increasing by just 3.8%. While the slowdown brings a major risk of overproduction of organic products in the face of a drop in demand in some countries like France other countries like Germany show a different picture. In 2021, Germany has shown significant progress with organic food sales reaching approximately €15.9 billion, a growth of approximately 5.8% (Helga Willer 2023). Moreover, while the market contracted in some countries, other countries such as Estonia (+13.0%), the Netherlands (+12.5%), and Austria (+6.5%), show an increase in retail sales in 2023 (Helga Willer 2023).

Since 2021, in some member states the organic food sector across the EU has faced challenges in both production and consumer demand, further exacerbated by inflation. This situation has affected organic agriculture expansion and led to decreased sales in many member states, with the severity of impact varying by country and sector. In France, for instance, the organic market experienced a significant decline, losing about 4.6% of its value in 2022, equivalent to around €600 million. Additionally, some organic products were “downgraded” to conventional sales due to lack of demand. This decline led to reduced shelf space for organic products in supermarkets, further limiting consumer access and choice, and weakening the sector's resilience. The organic market lacks in efficient organic processors, which also prevents the development of the sector. Finally, players in the distribution of organic products exert a negative influence on organic prices and producers' remuneration, thus not promoting market growth, which is necessary to achieve the F2F 2030 objective (Cours des Comptes 2022). However, recent data indicates that France's organic food market experienced stabilization in 2024, with sales fluctuating between a 0.4% decrease and a 0.4% increase compared to 2023. This marks a significant improvement from the 13% decline observed in the first half of 2023. Organic food sales in specialized organic shops and direct farmer sales saw growth during this period, while supermarkets and artisan retailers experienced a decrease in organic sales (Laurence Foret-Hohn).

(Le Provost et Uthayakumar 2024). On the other hand, at global scale, European countries led in organic food sales as a percentage of their total food markets. In 2021, Denmark had the highest share worldwide at 13.0%, followed by Austria at 11.6%.

The developments of the organic sector should also be put into perspective with the general economic context the EU is facing: the years after 2021 were characterized by a strong inflation, hitting particularly strongly food items in 2023 (Eurostat 2023), and a consequent impact on the purchasing power of European citizens. Compared with 2020, the share of total household expenditures on food decreased in the EU (except for Poland and Slovakia) while prices were rising (Eurostat 2023). In that context of economic crisis hitting the whole agri-food sector, organic products had to face a particularly unfavourable context for high-quality products that were seen for consumers – but also retailers and the conventional distribution- as less relevant than during the Covid years. According to a survey realized by Aarhus University (Aarhus University 2023), most consumers are feeling the impact of rising food prices as a result of the ongoing Russian invasion of Ukraine hence influencing strongly their food behaviours.

1.1.The value chain of the organic food system

A value chain is a sector where actors are interconnected and work together to create value (Boly 2019). The activities of a value chain are divided into two: upstream and downstream (see Figure 5).

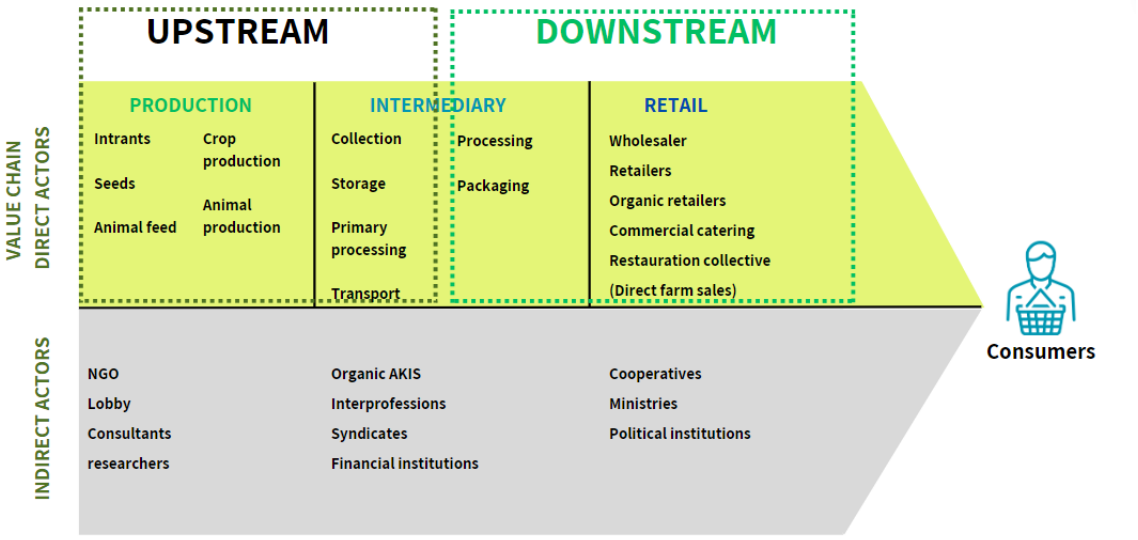

Figure 5 - Food system matrix (source: ITAB)

Upstream includes the manufacturing of agricultural inputs, agricultural production by farmers and breeders, as well as primary processing such as slaughtering. Downstream concerns processing activities into finished products, export, distribution and consumption. These upstream and downstream players are direct actors in the value chain, in other words links. There are also indirect actors, who are not links in the chain but interact with the links, such as NGOs, financial institutions, research and innovation organizations (AKIS), the government, consultants, etc. (Stein et Barron 2017). As shown in Figure 5, when these indirect actors are included, it is referred to as a food system rather than a sector or value chain (Pour un réveil écologique 2024). Both direct and indirect actors from the downstream value chain were interviewed in the Delphi survey.

Food systems are responsible for a large proportion of the world's greenhouse gas (GHG) emissions: agricultural production, processing and distribution account for more than a third of total GHG emissions. Although around two-thirds of these emissions come from agriculture, land use and land-use change at global level (FAO 2021), players downstream in the value chain (processors, retailers, wholesalers, commercial catering, transport) have a role to play.
At the French level, a Carbone 4 report (Ory 2021) recommends a reduction of 80% in emissions for the food industries between 2020 and 2050, and of 46% for agriculture. According to IDDRI (Brocard 2023), the political economy of food systems is dominated by private actors such as processors and supermarkets. They lead the market and therefore have a major influence both on the production and consumption of organic products.

Distribution channels are more or less diversified and structured in EU countries. In Denmark and Austria, supermarkets have been the main driving force behind the growth of the organic market, while in France and Germany, the organic market has begun to develop through organic specialised shops (Agence Bio 2021). However, supermarkets and discounters like Bioland, Lidl Naturland, Reve and Aldi are currently driving growth in Germany. For instance, Aldi Süd announced that it aimed to certify 25% of its organic standard assortment according to Naturland guidelines by the end of 2024. This goal was achieved ahead of schedule already in September 2024. Sales in organic specialised shops are particularly developed (>30% of organic market) in Belgium, Spain, Slovakia and Luxembourg. The out-of-home catering organic market also varies greatly from one country to another, particularly developed in the Netherlands, Denmark, Sweden and Italy, but non-existent in some other countries (Bulgaria, Finland, Ireland, Luxembourg, Malta, Portugal, Romania, Slovakia, Slovenia).

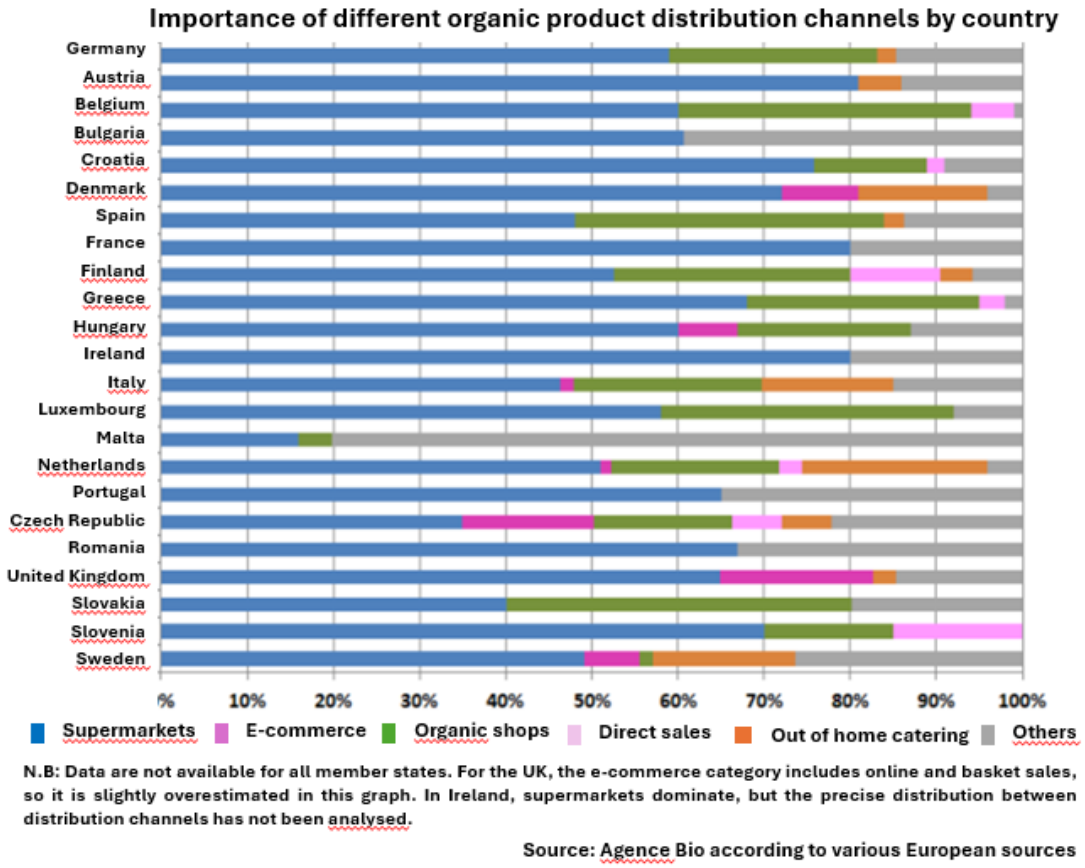

Figure 6 - Importance of different distribution channels for organic products by country (Agence Bio, 2021)

To consider the diversity of players in the value chain, in Task 4.3 the focus was on the following downstream players:

Actors	
Processors	The organic market is made up of 65% processed products, processors therefore play an essential role in the development of the organic sector (Cours des Comptes 2022). In Europe, there were 65,600 processors of organic products in 2019, of which 28% are French and 25% German (Agence Bio 2021).
Wholesalers	Wholesalers are another important link in the supply chain for organic products in Europe, although the market share of organic products in this channel is relatively limited.
Retailers	As for retailers, conventional retail was the main driver of the development of the organic sector in Austria and Denmark, while in France and Germany, it was specialized organic stores which played this role (Agence Bio 2021). As retailers are ideally placed between production and consumption, they have a key role in the development of organic sectors (Brocard 2023).
Out-of-home catering (OHC)	Out-of-home catering brings together public collective catering (school canteens, Ephad -care home for elderly people-, hospitals, etc.), private collective catering (company canteens), collective kitchens, commercial catering (fast foods, restaurants, hotels, etc.). Organic consumption in OHC was less than 4% in France in 2020, 3% for Austria in 2018 and 11.6% in Denmark in 2019 (Agence Bio 2021). However, according to a study by ADEME (Barbier, et al. 2019), 15% of French food consumption takes place outside the home. In Spain, 34% of household food expenditure is spent outside the home (WHO 2021). There is therefore an opportunity for development of the organic market for OHC players.

Table 1- Choice of downstream players

2. Methodology

ITAB conducted qualitative Delphi expert interviews to explore the views and reactions of the different value chain actors to the developed foresight scenarios in WP2 and get insight on the expectations in demand and market trends, supply chain structure, and value chain development. The Delphi interviews were carried out over two rounds to allow experts to react to each other's assessment. COISPA contributed to expand the work with interviews on organic aquaculture supply chain actors.

2.1. The Delphi method

The Delphi method has the following vision: "**Path towards the most reliable consensus for decision-making and modelling**", according to (Geurts et Haelewyck 2014). **Its objective is to find the elements of the subject of study with consensus in a given sample in order to inform decision-making.**
The Delphi method is based on the principle of carrying out several rounds of interviews with the same experts on a given subject (Sekayi et Kennedy 2017). There is no rigid methodology for the Delphi method, this is why studies using the Delphi method are often very different, so the researcher has the flexibility to choose the number of rounds of interviews they perform and the format he chooses.

According to (Ismail et Taliep 2023), there are several types of Delphi methods, each adapted to a specific study objective:

- "Classical Delphi": This method aims to obtain the opinion of a group of experts on forecast statements. It is characterized by complete anonymization of participants.
- "Decision Delphi": Used when a group of decision-makers work together to find a solution to a problem, this method is not anonymous.
- "Policy Delphi": Used to analyse political issues, this method does not seek to reach consensus. Rather, its objective is to better understand the diversity of points of view and to propose alternative policies.
- "Modified Delphi": This variation involves conducting interviews in the first round instead of using an online questionnaire.

As part of Task 4.3 of the project, an intermediate methodology was selected that combines elements of the "modified Delphi" approach—through individual interviews—with aspects of the "policy Delphi" method, which focuses on highlighting various perspectives to identify areas of consensus or dissensus. Additionally, it incorporates features of the "classical Delphi" method, as the study is oriented toward a prospective vision for 2030.

The first round of the Delphi method usually takes the form of an online questionnaire or interview with open-ended questions. Following this first round, the researcher uses the experts' verbatim statements to create statements, which will be used for the second questionnaire (Ismail et Taliep 2023). This second round allows experts to refute or confirm the assertions of the first round. The following rounds are dedicated to ranking these statements in terms of importance to the

expert. Between the two rounds, the results of the previous round are shared anonymously to all participants. Typically, rounds continue until consensus is reached.

Another characteristic of the method is that it generally allows quantitative rather than qualitative data to be obtained when conducted by online questionnaire. Only the first round facilitates obtaining more qualitative data via open-ended questions (Sekayi et Kennedy 2017).

2.2.Workflow

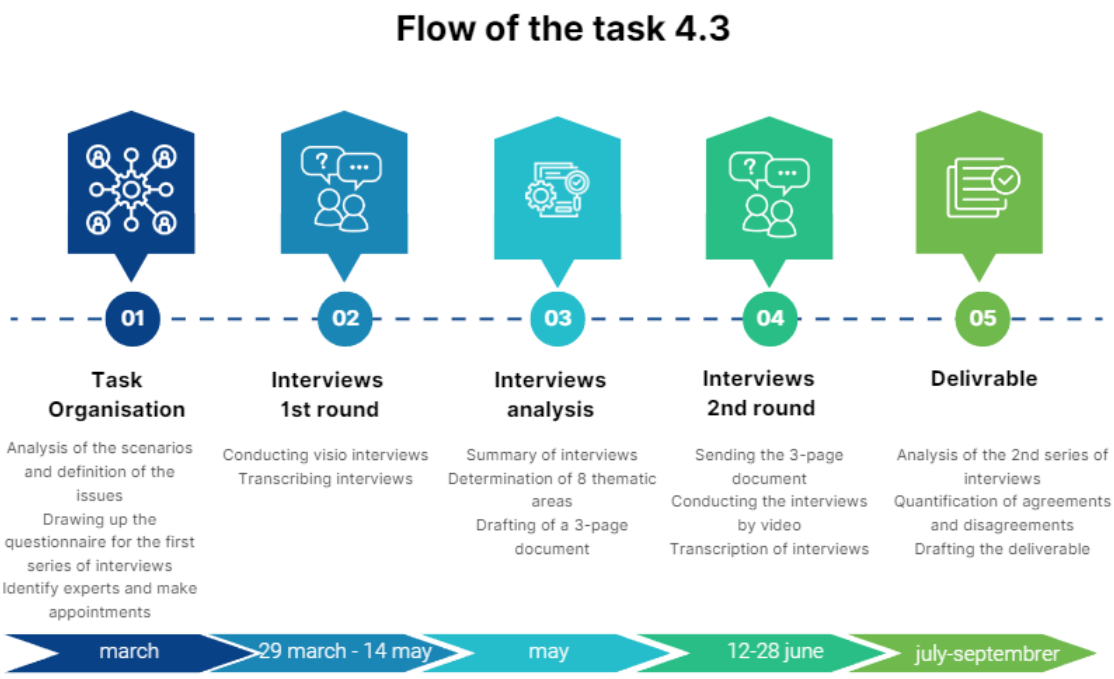

Figure 7 - Organization timeline of task 4.3

Task 4.3 was structured around 5 phases, as shown in Figure 7 above.

Phase 1: Task Organization
The organization phase was carried out over approximately six weeks. It consisted first of all in analysing and understanding the four scenarios developed in WP 2: these scenarios served as a basis for formulating the problem of the study and subsequently constructing the questionnaire (see paragraph 2.4.1 for more details). It was during this phase that we identified the European experts and contacted them by email. An appointment was made with the volunteer experts.

Phase 2: Interviews 1st round
The first series of interviews was carried out between March 29th and May 14th 2024. The first round of interviews served to identify the important changes, brakes and levers in the eyes of experts for developing organic agriculture and more broadly organic market.

Phase 3: Interviews analysis
At the end of this first series of interviews, a time of analysis was necessary, over the duration of the month of May. A 3-page report was shared with the experts (see detailed methodology in chapter 2.4.3)
This document includes both statements that seem consensual and other recommendations that were debated during the first round (see Appendix 2 and 3). This document was created by categorizing the verbatim statements of the interviews into recurring themes to bring out observations.

Phase 4: Interviews 2nd round
Finally, during a second round of interviews, the experts deepened into these statements and expressed whether they agreed or disagreed with them, and why.
This methodological choice allowed experts to hear the opinions of other experts in the field while remaining anonymous, and to question their opinions and proposals (see details in section 2.5). Including all the stakeholders in drawing up the action plan means that actions can be developed taking account of everyone's needs and doubts. This encouraged the proposal of cross-functional, collaborative and sustainable actions.
A written transcription and a recording of each interview were kept by the project partners who conducted these interviews. For the majority of interviews carried out by ITAB, 2 researchers were mobilized: one to conduct the interview, the second to transcribe the interview live.

Phase 5: Deliverable
The experts' responses to the two interviews were analysed for each theme, sub-theme and proposition and were categorized according to 3 levels of agreement: agree, partially agree, disagree. This quantitative analysis was used to identify consensus, minority opinions and dissent Recommendations were then made for each of the themes, based on the analysis of consensus, minority opinions and dissent.

2.3.Expert panel

Constitution of the panel of experts

Around a hundred European experts were contacted. ITAB identified experts in France while Practice Partners provided contacts for their respective countries: Naturland for Germany, ICOEL for Denmark, LKNO for Austria, CIHEAM Bari for Italy, AUTH for Greece and OMKI for Hungary. We contacted experts from France, Germany, Denmark, Italy, Greece, Hungary. The interviews in Romania were not carried out due to lack of availability of the experts provided by USH and language barriers.

The sample of interviewees accurately represented both the downstream of the value chain and indirect actors within the food system. For greater representativeness, the panel includes both 100% organic players and mixed players (with a share of organic products), that is to say who deal with organic and non-organic products. Among the experts who volunteered to participate in the study, some were excluded either due to their unavailability or to avoid over-representation of certain countries or certain categories of downstream stakeholders. Naturland, LKNO and AUTH contributed to establishing a panel of 29 experts (see Table 2).

Contact was made by personal emails sent to the identified experts. Following this first email, two follow-ups were made when we received no response. When an expert responded positively to our request, we sent them a second email to schedule a one-hour slot for a video interview (see Figure 8.)

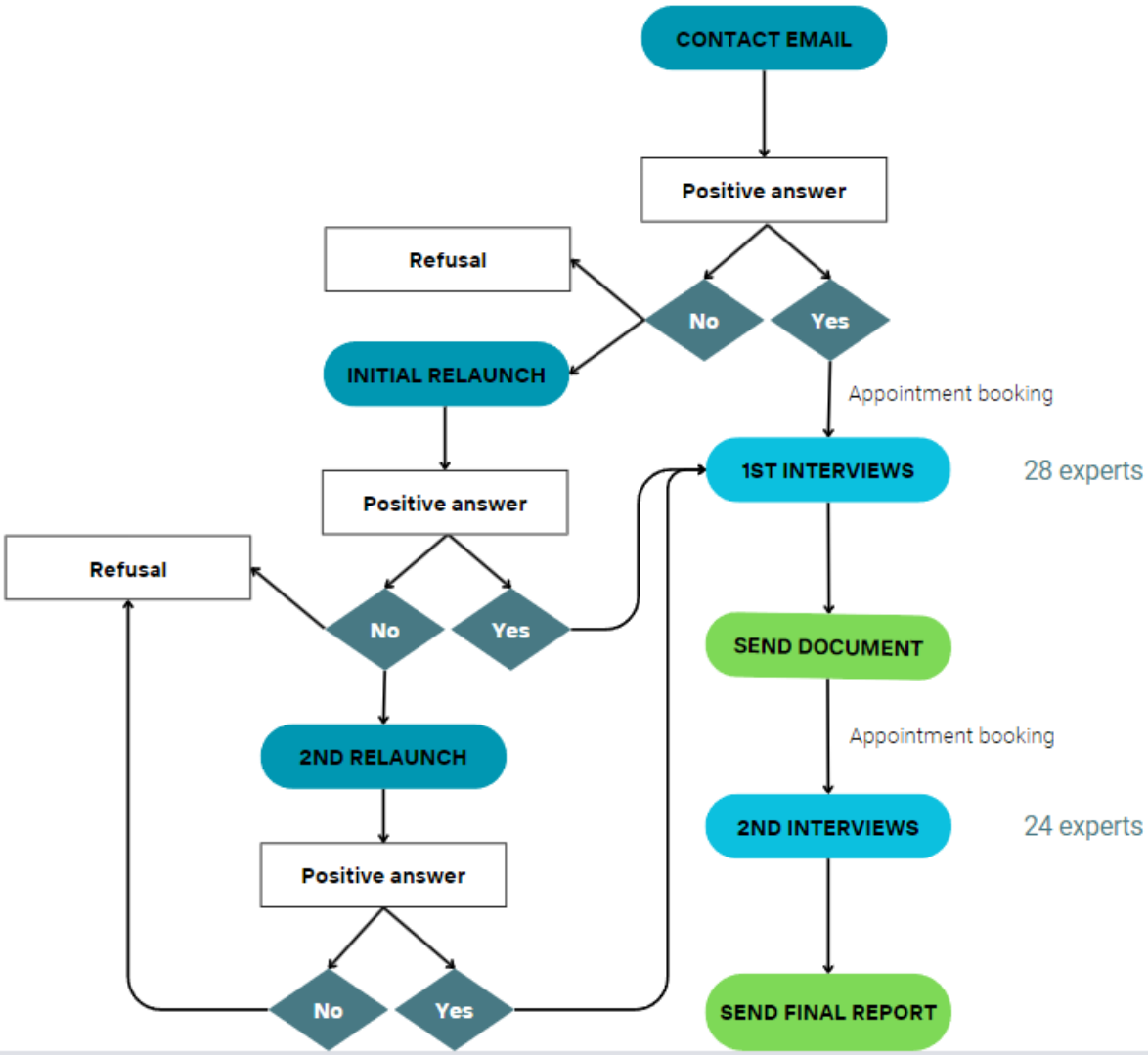

Figure 8 - Flowchart for task 4.3

For confidentiality reasons, the names of the actors interviewed, their responses and their organizations were anonymised and are not public.

Composition of the panel

The panel is made up of 11 French experts, 8 German experts, 4 Danish experts, 2 Austrian experts, 2 Greek experts and 2 Italian experts. Of the 29 experts, 9 are working for companies specializing in the organic market exclusively, 12 work for mixed companies or organizations with between 1% and 75% organic, and the other 7 experts are consultants or advisors.

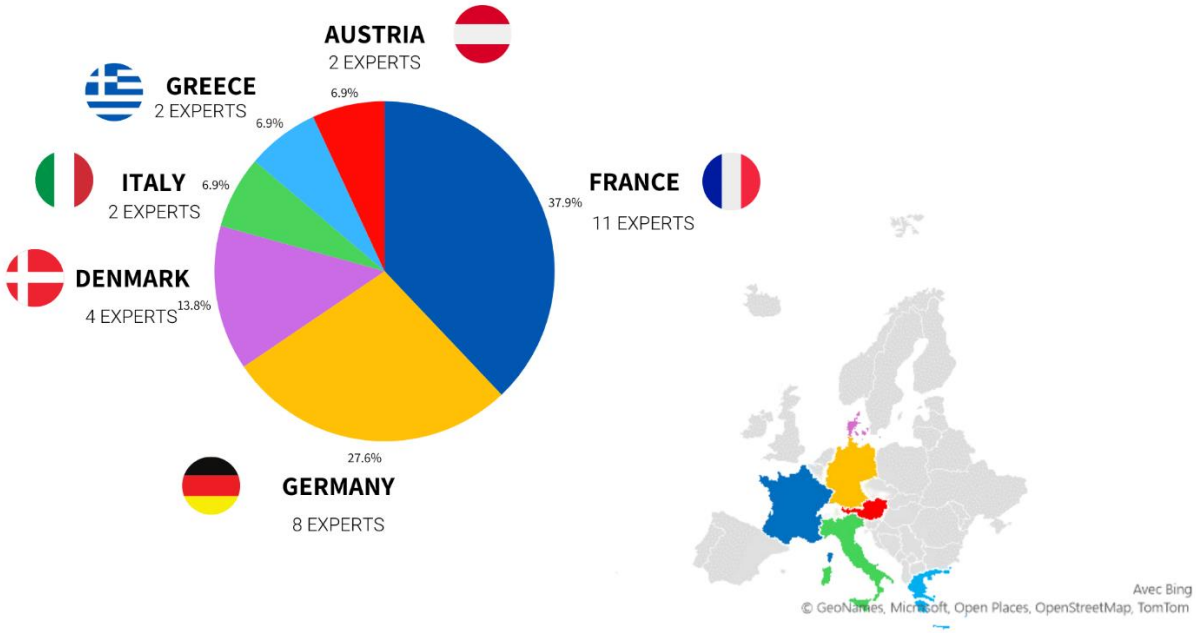

Figure 9 - Origin countries of experts interviewed

Regarding the type of actors, 10 processors, 6 retailers, 6 consulting agencies, 2 wholesalers, 2 organic inter-professional associations, 1 departmental council and 1 collective kitchen were interviewed (see Figure 10).

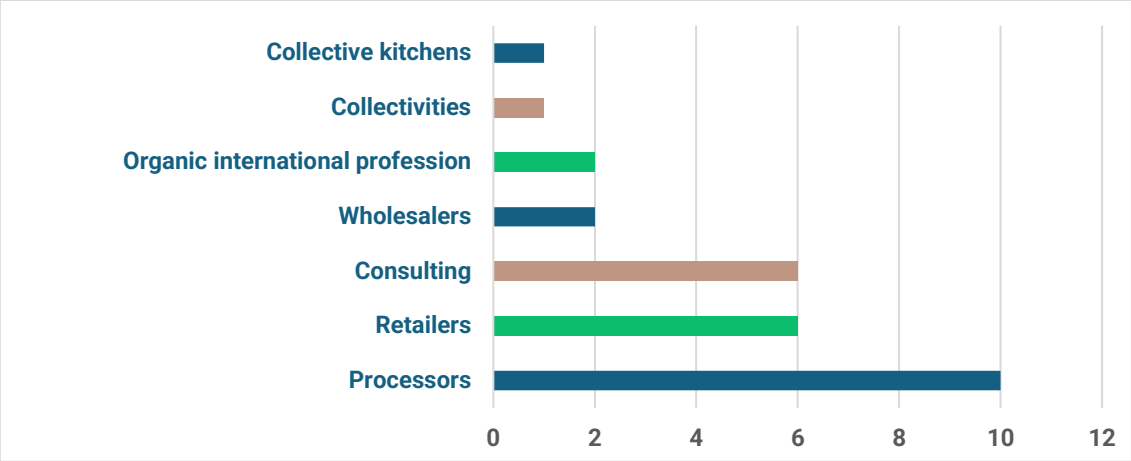

Figure 10 - Distribution of experts according to the type of actors represented

The turnover of the processors and retailers in this study is very varied ranging from 1.3 million euros to 26 billion euros. Some experts were not able to provide this the turnover figures for each company represented. Some operators operate on a regional scale, others nationally, others Europeanly or even internationally.
9 of the experts interviewed are the presidents or general managers of their company or organization. 12 are managers, managers or directors in CSR, insights, short circuits and public collective catering, sector, organic products, supply chain, sustainable agriculture or animal products. The consultants are specialized in organic prospective, distribution, upstream and agricultural policy, sustainable aquaculture, organic aquaculture supply or food marketing.

Regarding **organic aquaculture**, OrganicTargets4EU focusses on Germany and Greece. 5 experts (3 from Germany and 2 from Greece) out of the 29 were interviewed using an adaptation of the questionnaire to the organic aquaculture needs.

	Code	Country	Actor type	Expert type	Turnover / Size	Organic portion	Driven by	Interview language
1	FR01	France	Organic processor	Insights manager	€500 million turnover	100%	ITAB	FR
2	FR02	France	Consulting	Organic consultant	N / A	N / A	ITAB	FR
3	FR03	France	Collective kitchen	Chef	1 million 550 meals in 2023	34% of supplies	ITAB	FR
4	FR04	France	Departmental Council	Short circuit and public catering manager	Around 400,000 inhabitants	24% of public collective catering supplies in the department	ITAB	FR
5	FR05	France	Mixed retailer	Offer and sector director	1.3 M€ turnover	75% of sales	ITAB	FR
6	FR06	France	Organic inter-professional association	Director	300 members	100%	ITAB	FR
7	FR07	France	Mixed processor	Director	€500 million turnover	10.6% of sales	ITAB	FR
8	FR08	France	Consulting firm	Distribution consultant	N / A	N / A	ITAB	FR
9	FR09	France	Engineering office	Upstream consultant and agricultural policy	N / A	N / A	ITAB	FR

10	FR10	France	Organic retailer	Sector manager	€1.5 billion in turnover	100%	ITAB	FR
11	FR11	France	Mixed retailer	Category manager organic	€25.89 billion in turnover	6% of sales	ITAB	FR
12	DE01	Germany	Aquaculture consultancy	Sustainable aquaculture consultant	N / A	N / A	Naturland	DE
13	DE02	Germany	Importer and wholesaler	Organic and fair-trade supervisor	€87.5 million turnover	40% of sales	ITAB	EN
14	DE03	Germany	Organic Farmers Association	Project manager	N / A	100%	Naturland	DE
15	DE04	Germany	Organic processor	Sustainability supply chain manager	€240 million turnover	100%	ITAB	EN
16	DE05	Germany	Organic processor	General manager	€70 million turnover	100%	Naturland	DE
17	DE06	Germany	Organic processor	General manager	N / A	100%	Naturland	DE
18	DE07**	Germany	Mixed aquaculture processor	General manager	N / A	51% of sales	Naturland	DE
19	DE08	Germany	Aquaculture Consulting	Organic sourcing consultant	N / A	N / A	Naturland	DE
20	AU01**	Austria	Organic farmer and processor	General manager	N / A	100%	LKNO	DE
21	AU02**	Austria	Mixed retailer	Organic products manager	€6.4 billion in turnover	10% of sales	LKNO	DE
22	DK01	Denmark	Mixed wholesaler	Sustainability manager	N / A	25% of sales	ITAB	EN
23	DK02**	Denmark	Mixed retailer	CSR Manager	€46.9 million turnover	16% of sales	ITAB	EN
24	DK03	Denmark	Mixed processor	Agriculture sustainability manager	€13.7 million turnover	N / A	ITAB	EN
25	DK04*	Denmark	Organic processor	Marketing Director	€200 million turnover	100 %	ITAB	EN
26	GR01	Greece	Mixed retailer	Category manager meat and fish (organic aquaculture)	N / A	Less than 1% of sales	AUTH	GRE
27	GR02	Greece	Research	Market trends consultant (organic aquaculture)	N / A	N / A	AUTH	GRE
28	IT01	Italy	Mixed farmer and processor	Vice President	N / A	20% of sales and 10% of volume sold	ITAB	EN
29	IT02	Italy	Organic processor	President	N / A	100%	ITAB	EN

**this expert has only participated to the 2nd round ; **these experts have only participated to the 1st round*
Highlighted in blue: aquaculture experts

Table 2 - Panel of experts who participated in the study

2.4.First round of interviews

Development of the questionnaire and guidelines for interviews

The questionnaire was drawn up on the basis of the four scenarios developed in WP2 and the various drivers developed in these scenarios. We decided to conduct the interviews in 2 phases: the first was a non-directive phase of free expression, allowing the interviewee to freely express his or her ideas on the issue, and the second was a semi-directive phase during which we used the questionnaire drawn up to supplement the free expression phase and to get the experts to clarify their points of view on the issue of our study.
The questions were built reflecting the differences between the 4 scenarios. Through an iterative process, the questions could be linked to the scenarios and ultimately allowed to investigate whether the experts' opinions were taking the direction of one scenario or another. These questions were available to complete the free part of the interview, and only asked when they could provide additional answers or clarifications on the comments from the free phase. The questions asked were kept as open-ended as possible in order to avoid influencing the experts' answers.
Thus, for example, for the "political climate towards OF" driver, we formulated the following questions:

- What political decisions could help or hinder the development of your organic business? On what scale (European, national, local)?
- How would your business be impacted if there were demanding policies to push organic?

Or for the "competition from alternative standards" driver, the questions asked formulated were:

- In your purchasing policy, what is the current strategy regarding labels/products (purchasing criteria)?
- How do you manage to stand out when labels are multiplying and giving way to competition from local, GMO-free, additive-free, etc. (for organic processing)?

Some of the scenario drivers were discarded because they were not related to stakeholders downstream of the value chain (such as the "water availability for agriculture" driver).

We grouped the questions by theme and worked on their wording, making sure that they could complement the non-directed part of the interview to help clarify the experts' opinions.
At this stage, the questionnaire was tested with the first interviewee and already last for an hour which was the maximum threshold acceptable.
We felt that it was preferable not to include questions that were too specific on small details mentioned in the scenarios. The reason for this is that we want to keep the first round broader so that experts can give us their ideas for actions they could implement to develop the organic sector. Questions such as: "Some think that it is the political decisions at the European level that could be most beneficial for the development of organic farming. Others think that it is the decisions at the national or even local/regional level that could have the greatest impact. What do you think?", would have limited the answers to what the scenarios suggest. What we wanted to get from the first round is what comes to the minds of the interviewees first, without leading them to two or more answer options.
The questionnaires were adapted to the type of interviewee, and COISPA adapted it to the aquaculture sector, taking into account scenarios developed specifically for aquaculture.
Guidelines were developed to guide partners in carrying out the interviews and ensure aligning the process among the different countries.

Conduct of interviews

28 interviews were conducted in total. ITAB carried out 18 interviews: 11 experts were interviewed in French, 7 were interviewed in English. Naturland, LKNO carried out 8 interviews in German and AUTH carried out two interviews in Greek.

To begin the interview, the objective of the study and the research questions (*How can changes be implemented downstream in the food supply chain to promote the development of organic agriculture by 2030 in Europe?*) were explained. The objectives and the research questions were also shared with the experts by email beforehand.

The interview started with a brief presentation of the OrganicTargets4EU project and ITAB, when the interviews were carried out by ITAB. Afterwards the experts presented their company or organization, the percentage of organic in terms of volume of sales or turnover and their expertise in the business. This data collected allowed to analyse the experts' responses according to their position in the market.
The rest of the interview took place into two phases:

- **Phase 1: Undirected interview**

During the undirected interview, lasting between 10 and 20 minutes, the researcher did not intervene except for giving the interview instructions to the expert. The aim was to identify themes and priorities for each type of actor without bias.
The instructions for this interview go as follows: “By focusing on the downstream of food chains, the study in which you are participating aims to understand how changes can take place in European food supply chains to promote the development of organic farming in Europe by 2030. In your opinion, what actions could your organization, as well as all the links in the sector, undertake to develop the organic sector? The idea here is to identify the levers to prioritize to develop the organic sector but also to identify the obstacles to the implementation of these changes.”

- **Phase 2: Directed interview**

During the directed interview the researcher asks structured questions on more specific themes to further explore what was mentioned during the undirected phase of the interview, as well as to address new subjects not previously discussed. The guided interview lasted approximately 40 minutes.
The specific questions in this phase are drawn from the finding of the scenarios on the following themes:

- Strategies for developing organic
- Future trends in organic markets
- Changes to be made in the value chain
- Levers and brakes to disseminate these changes
- Actors to be involved and their role in the transition
- Collaboration in value chains
- Public policies and regulations to be implemented
- Influence consumer demand
- Purchasing policy strategies
- Distribution of value between actors
- Collective catering
- Organic import-export strategies

Analysis of interviews

The verbatim of all the interviews were classified into groups of recurring subjects, and eight key themes were identified, each detailing potential actions aimed at contributing to the development of the organic sector in Europe.

All the interviews were transcribed and analysed to identify the main themes, ideas or concepts in the experts' interviews. From the main themes the sub-themes or variations of opinion under each main them were identified.
Once each individual interview was analysed, the experts' proposals were classified into main themes and sub-themes allowing to note how many experts mentioned each theme or sub-theme. The frequency of mentions enabled the selection of the proposals to be presented to the experts before the 2nd rounds of interviews. The 3-page interim report with the selected proposals was shared with the experts via email.

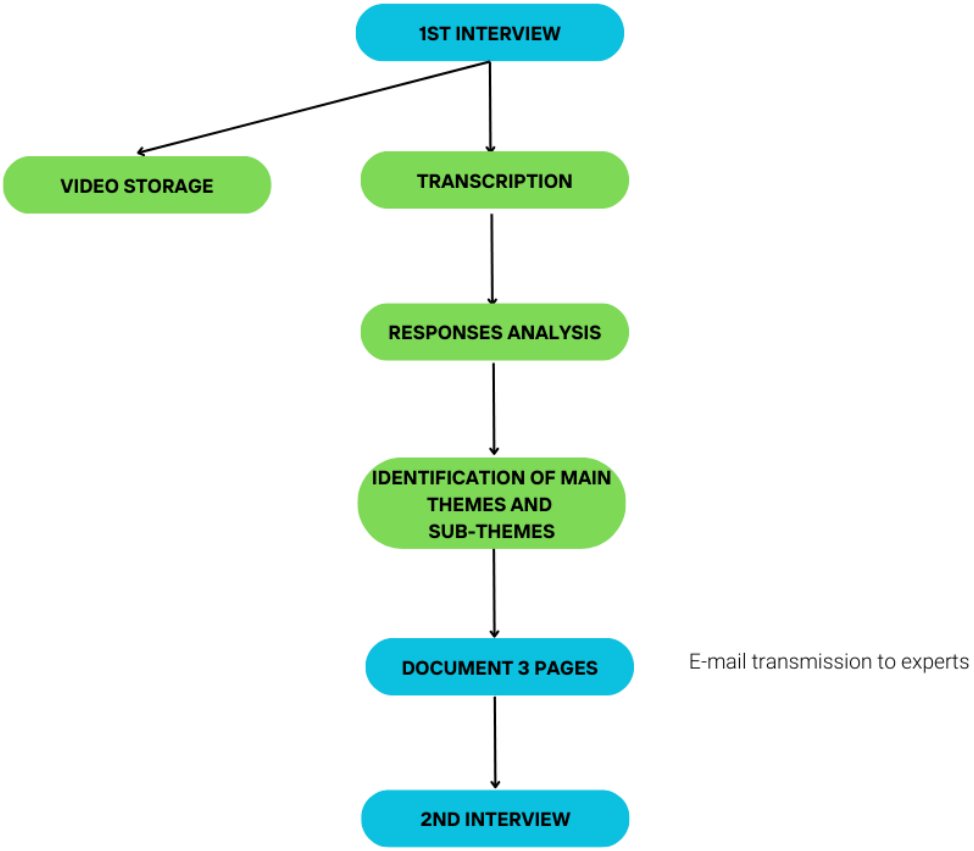

Figure 11- Processing of data from the first interviews

Drafting of the summary presented at the second round of interviews

This work of classification and thematic analysis of the different verbatims served as a basis for writing the interim report which was sent by email to the experts (see Annex 3), before carrying out the second series of interviews. Special attention was given in summarizing the content of 28 interviews while remaining true to the experts' insights, ensuring their key perspectives were accurately reflected. The document was then adapted by COISPA team for its version intended for organic aquaculture experts.
This interim report was sent individually by email to the experts, at least one week before the second interview.

2.5.Second round of interviews

The second round of interviews took place in June 2024.
This new round aimed to focus on gathering experts' feedback on the 3-page interim report summarising what the panel of interviewed experts had to say in response to our main question: How can changes be made downstream in the food chain to encourage the development of organic farming between now and 2030?
Experts were asked to read this document carefully before the second interview and to prepare their feedback. Experts were asked whether they agree or disagree with what it said, whether they would like to give more information on a subject, and whether reading the document gives them any new ideas for action to help develop the organic sector in Europe.
The interim report was sent at least 1 week before the second interview to allow the experts to prepare their second interview and elaborate their agreement or disagreement with the proposals.

As in the first round, experts expressed themselves freely on the basis of the document. Most of the experts interviewed chose to follow the flow of the 3-page document to give their opinion on the proposals. Overall, not every expert had an opinion on every proposal depending on their expertise.
The interview lasted between 20 and 40 minutes, depending on the level of detail given by each expert in their answers. 5 experts who participated in the first round were not available for the second round of interview but shared written views on the proposals in the interim report.

A frequency analysis for each proposal was carried out, noting how many experts mentioned each theme or sub-theme. Although this is not quantitative analysis in the strict sense, the frequency of mentions indicates a certain degree of consensus. The responses showing agreement, partial agreement or disagreement for each proposal, and for each expert were counted enabling to assess consensus and dissensus.

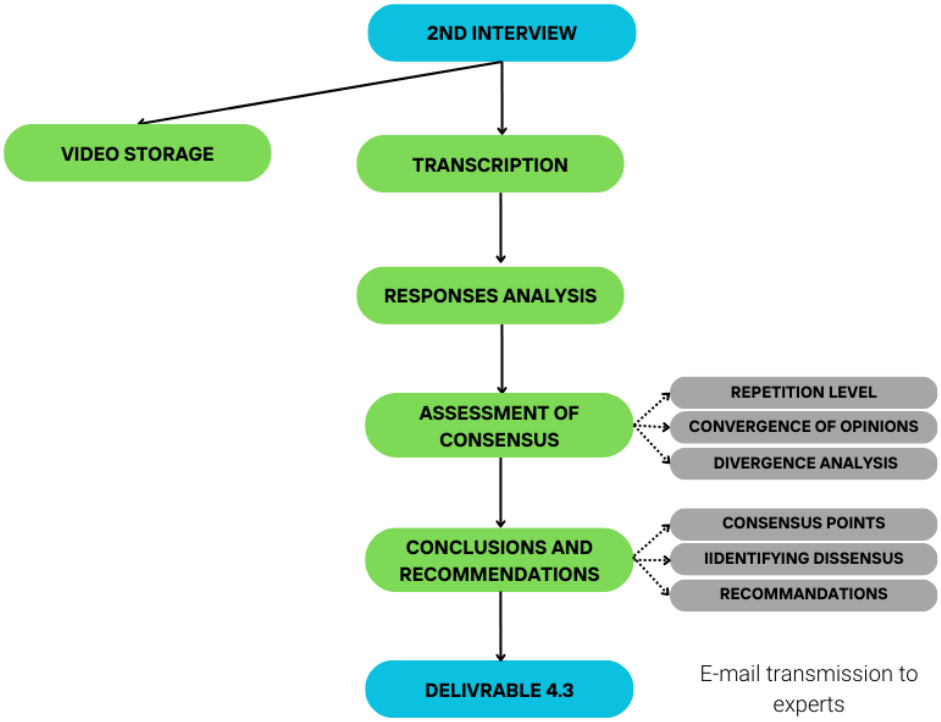

Figure 12 - Processing data from the second round of interviews

This has enabled to identify, on the one hand, frequent themes mentioned by a majority of experts, suggesting consensus, and on the other hand, themes mentioned by few experts, which may show divergent opinions or dissensus (Figure 13).

2.6.Limitations of the study

There are a number of limitations to this study to be considered when interpreting the results can on a wider scale. One of the main limitations concerns the sample of experts interviewed: France and Germany are over-represented, accounting for 2/3 of the experts interviewed. However, it has to be considered that France and Germany (along with Spain and Italy) account for a significant proportion of organic production and consumption in the EU. Most of the Practices Partners did not have dedicated project budget for Task 4.3 and did not have the resources to con to this survey. This was an obstacle to reaching all the targeted countries equally and led to us not having experts for Romania and Hungary.
18 of the interviews were conducted by ITAB and the other 10 by our partners, which means that the interviews were not all conducted in exactly the same way. The analysis of these 10 interviews had to be based solely on our partners' interview notes. As a result, the quality of the interviews varies, which sometimes gives more room to the opinion of certain experts for whom the interview notes were more precise. In addition, the experts who conducted the interview in English, which was not their native language, sometimes found it difficult to fully express and develop their opinion and gave very little detail on elements specific to their country, unlike the experts interviewed in their mother tongue.

We were unable to verify that the panel of interviewees is gender-balanced, as the transcripts of the interviews conducted by our partners are anonymous and did not include this question in the conduct of the interviews. However, only 4 of the 18 experts interviewed by ITAB were women.
In addition, 1 of the 29 experts was unable to take part in the first round of interviews, but did contribute to the second round; 5 experts who took part in the first round did not take part in the second round despite being asked to contribute in writing. This 'loss' of experts between the 2 rounds of interviews was a critical point identified when the project was being drafted, but we feel that it remains very reasonable.
Finally, one of the objectives of the problem was to determine how to bring about these changes in the value chain, but the results of the interviews did not always make it possible to identify ways in which the actions proposed by the experts could be put into practice. Nor do we have any idea of the socio-economic consequences of each of the proposals on all the stakeholders and on the market.

Some experts find it difficult to project themselves into a 2030 timeframe and are very influenced by the current economic situation and difficulties in organic farming in some EU countries. Furthermore, the experts did not address some of the themes addressed by the scenarios which were taken into account in the interview questionnaire: we can notably cite the example of the driver on the NGTs which did not elicit any reactions.
We had some difficulty identifying the proposals on which there was consensus, and the differences and dissents, based on interviews in which each expert did not give an opinion on each of the proposals made: adding a round with an online questionnaire (in addition to, or instead of, round 2) would have made it possible to obtain more reliable quantitative data to measure consensus and dissensus on the various proposals.

Part A: Organic farming supply chain

3. Results

The qualitative Delphi experts interview method is based on an in-depth analysis of the themes, the frequency of responses and the convergence of opinions. The process consists of systematically identifying and synthesizing recurring ideas, while taking into account the nuances and divergences in the experts' responses and giving the possibility to quantify the number of experts who expressed an opinion on each theme and sub-theme. The second round of interviews provided an opportunity for controlled feedback on the 3-page interim report (see Annex 4). Quantification was carried out on both interviews.
The proposals arising from the 3-page interim report of the first round were refined through an iterative process (see Annex 3).
The analysis aimed to determine whether the interviewees' country of origin or the type of actor influenced their opinions. However, no significant impact of these factors was detected in the responses provided. The 8 themes identified after the first-round interview, and their sub-themes go as follows:

Theme 1: Raising consumer awareness of organic produce

- A common front
- The benefits of organic food
- The budget
- Communication
- Transparency
- Labels
- Organic education
- Testing organic

All the interviewed experts mentioned communication about organic food as a major lever for boosting market growth. The following terms stand out, having been mentioned several times by the experts: ‘Raise awareness’, ‘Education’, ‘Communication’, ‘Explain’ and ‘Understand’.

Theme 2: Working on affordability

- Margins
- Promotions
- VAT
- Productivity
- Packaging

The expert panel emphasized that the price of organic products plays a crucial role in influencing consumers' purchase decisions. The experts agreed that organic products need to be more affordable and that the price gap with conventional products must be minimized. Some even suggested that organic products should be priced similarly to conventional ones to truly democratize organic consumption, as this could significantly increase consumer preference for organic options.

Theme 3: Innovating organic products

- Consumer desires
- Processed products
- Mirror products

Innovation was brought up by 15 experts during their interviews, who pointed out that organic is a market for innovation. Offering a range of products tailored made to consumer expectations would offer market development opportunities for processors and retailers. For retailers, innovation can be achieved through organic private labels.

Theme 4: Raising the profile of organic products in sales strategies

- Online sales
- Physical points of sale
- Organic ranges
- Setting up organic products in shops
- Staff training

There are several marketing techniques that can stimulate the expansion of the organic sector. A key factor in encouraging the purchase of organic products is their availability. It is crucial that organic products are easily accessible in the places where consumers typically shop. Equally important is ensuring that the organic options are clearly visible and well-promoted to attract buyers' attention.

Theme 5: Promoting organic food in out-of-home catering

- Commercial catering
- Private mass catering
- Public catering
- Training
- Reducing costs
- Supply

Experts believe the catering sector plays a crucial role in advancing organic food because it represents a unique market that complements, rather than competes with, other organic food outlets like mass distribution and specialised organic stores. In this context, the catering industry, such as restaurants, cafes, and institutional food services, serves as an "additional market" for organic food, offering growth opportunities without taking sales away from traditional retail channels.
The current rise in out-of-home dining offers a promising opportunity for the growth of organic food. Public catering, especially with the backing of supportive public policies, should be a key focus for expanding organic products, as it has substantial potential to boost demand and make organic options more commonplace in everyday life.

Theme 6: Supporting organic producers

- Contractualization
- Integrated supply chains
- Financing
- Short distribution channels

Although this study focussed on the downstream end of the value chain, all the experts spoke at least once about the upstream agricultural sector. They stressed the need for a strong link with the upstream sector, and for synergy between the upstream and downstream sectors. Secure outlets and healthy, fair-trade relations can encourage upstream farmers to develop organic production.
There is a consensus on the need for strong support for organic producers. This support can be provided through long-term contracts, the construction of integrated value chains or producers' cooperatives, public or private funding and, finally, short-distance sourcing.

Theme 7: Choosing your market: national, European, international

- Import/export
- Local

For many experts, it is important to prioritize the development of local organic products. However, imports can provide a more diversified, high-quality supply at attractive prices, as long as these products comply with EU standards. It is important to notice that the general result does not reflect other underrepresented countries (e.g. RO, HU, ES) which have a strong export focus.

Theme 8: Working together within food systems

- Getting involved in organic associations/inter-professions
- Lobbying
- Local organization of production
- Collaboration downstream
- Research

Collaboration between all the players in a food system is a major point raised by 26 out of the 29 experts. They believe it is necessary to work together more effectively, by encouraging meetings and promoting cooperation between players.
Collaboration is seen as a powerful lever for creating more structured and sustainable organic sectors, particularly by joining organic associations or inter-branch organizations, creating a common organization to organize production and coordinate actions in the sector, and finally by funding research.

Consensus can be assessed based on the number of times an opinion is repeated by different experts. Divergences were analysed by noting the justifications given by the experts. They may indicate a more tempered opinion, or a clear disagreement. Minority opinions, for which few experts expressed themselves, were also noted. Based on the identified consensuses and dissensus, recommendations were proposed.
The results for each of the 8 themes and their sub-themes, the experts' feedback, the points of consensus and divergence identified, and finally the recommendations arising from this analysis are presented in the following paragraph.

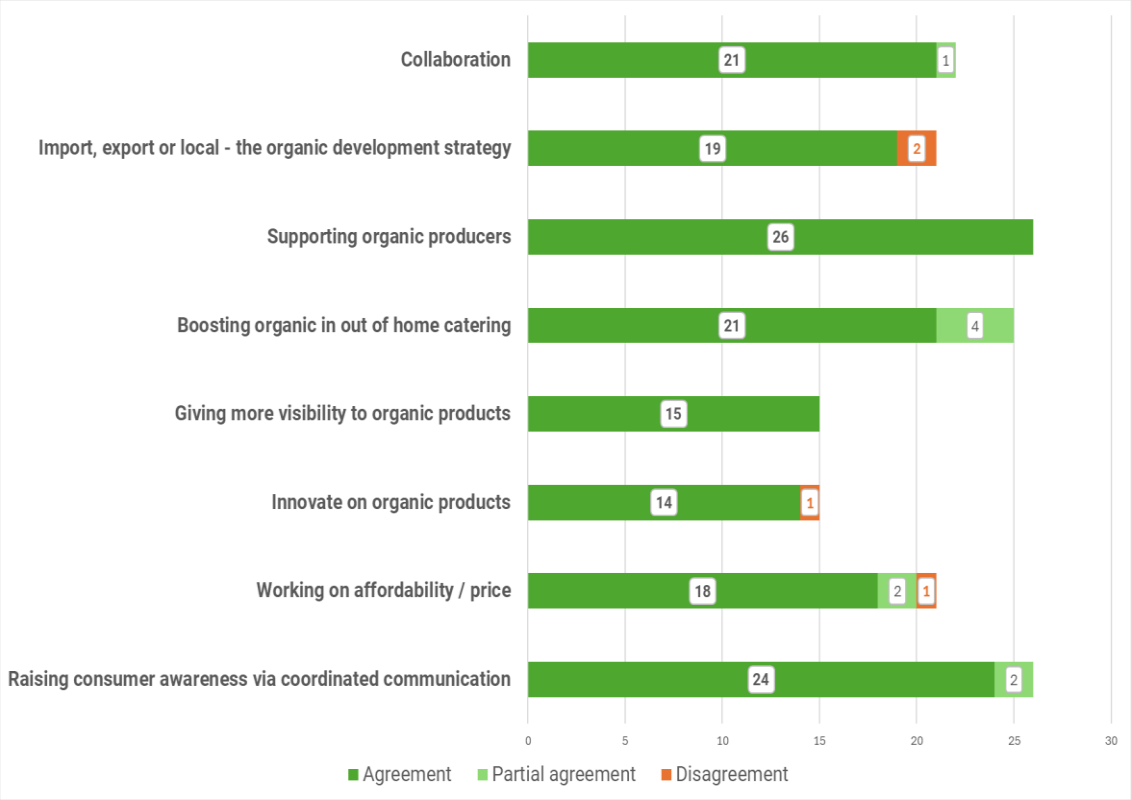

Figure 13 – Level of agreement of opinions expressed by experts for each theme

3.1. Raising consumers awareness via coordinated communication

What do the experts say

Raising consumers awareness via coordinated communication was the most discussed theme with 24 out of the 29 (82.8%) experts agreeing on the **importance of communication to raise awareness of organic produce** and increase demand. Communication plays both an educational role in explaining what organic is and a role in making organic produce more attractive to consumers. However, two of them felt that it would be difficult to achieve coordinated communication from all the players involved.

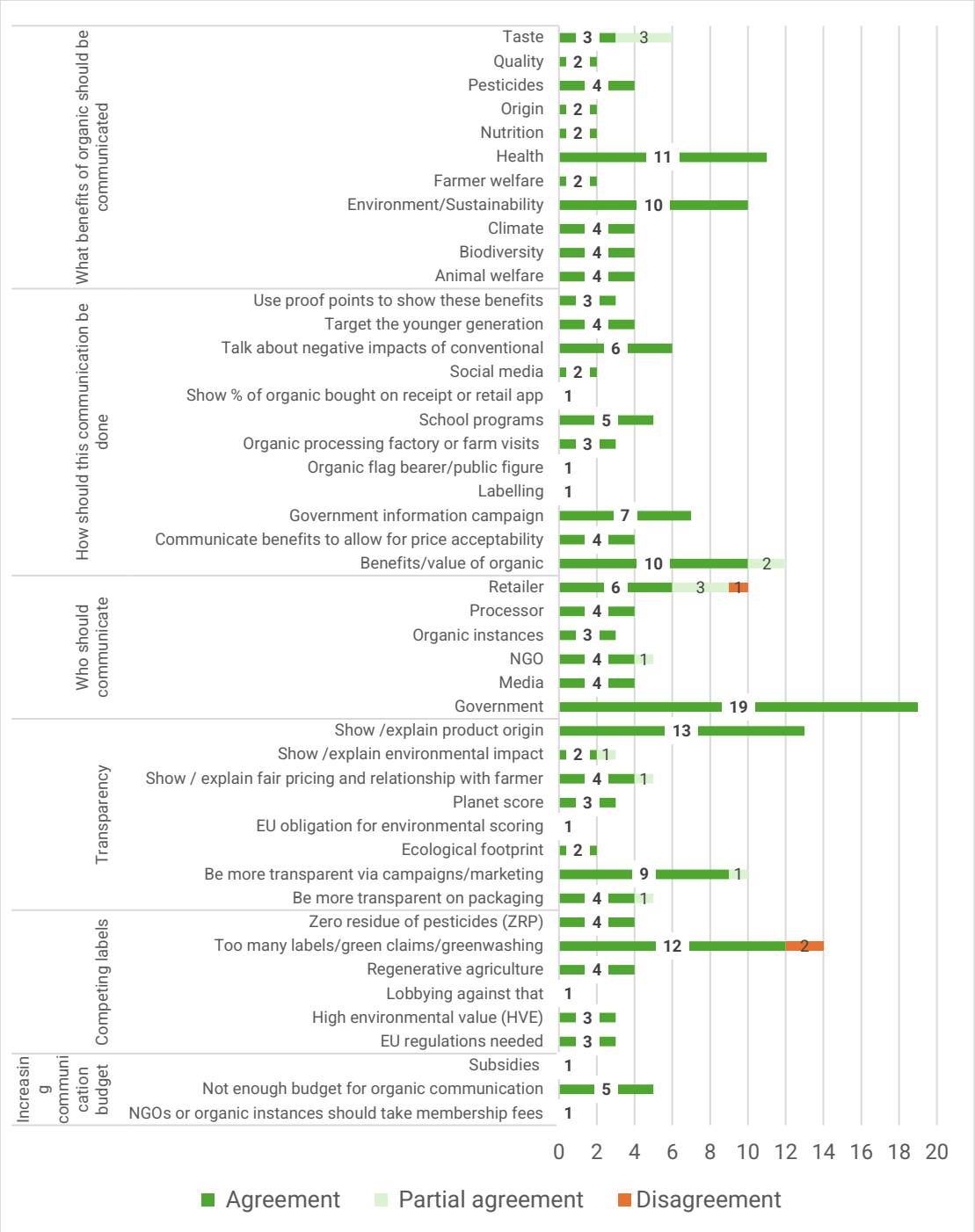

Figure 14 – Level of agreement of experts' opinions about "Raising consumer awareness via coordinated communication"

Who should communicate?

According to 19 experts, **governments should play a major role in communicating about organic food**. Other players were also mentioned several times, such as retailers (6/29 – 20,7%), processors (4/29 – 13,8%), NGOs (4/29 – 13,8%), organic bodies (3/29 – 10,3%), medias (4/29 – 13,8%), as well as farmers' associations, researchers and health insurance funds. All these actors should work together to create strong communication campaigns in favour of organic, but **coordinated communication may be difficult**, especially with mixed actors such as retailers.

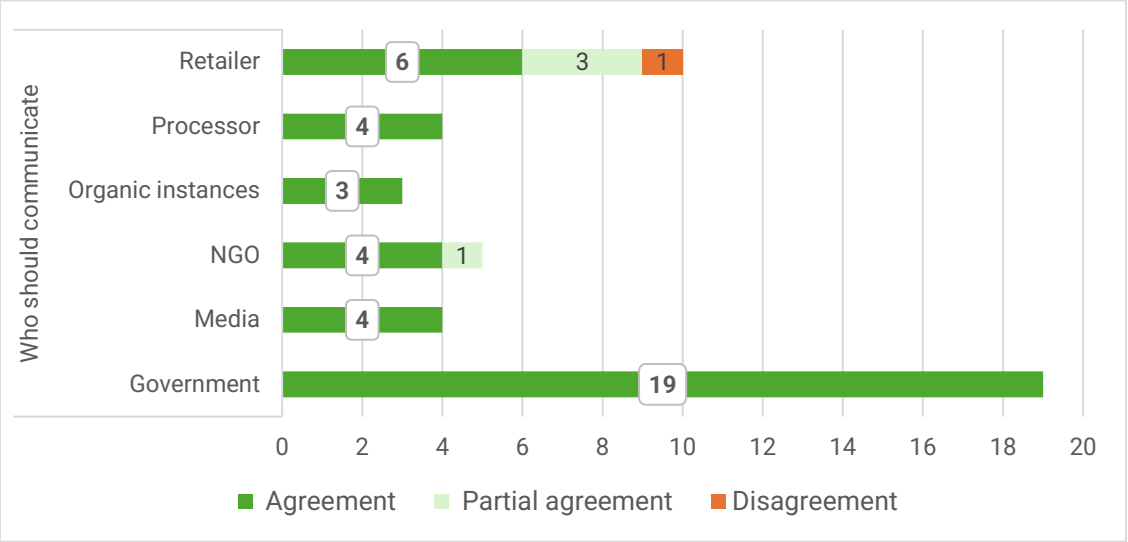

Figure 15 - Level of agreement of experts' opinions about "who should communicate"

How this communication should be done?

19 (65,5%) experts mentioned the role of the government in this communication, 7 think this could be done via **information campaigns either at national or EU level**, in tv ads or other advertising means, which could also be shared by retailers.
7/29 (24,1%) experts suggested that organic awareness could also be done through **governmental information campaigns.** 5 (17,2%) recommended to foster organic awareness that through **education** at school and university level, including education to organic agriculture in school programs by discussing nutrition, food production, environmental impact. 3 (10,3%) experts recommended the involvement of processors and farmers in **organizing farm and factory visits**.
4/29 (13,8%) experts believed communication should target mainly the younger generation as they are more concerned by the environment.
6/29 (20,7%) experts said communication should also be done by **comparing benefits of organic to conventional or explaining the negative impact of conventional agriculture.**
3/29 (10,3%) experts pointed out the needs to scientifically prove the benefits of organic to gain consumers' trust. 10/29 (34,5%) experts advised on the importance to **communicate all the benefits of organic**. One expert said that "*the organic label is an important lever to raise awareness on organic, it should be clear and simple*".
2/29 (6,9%) experts acknowledged that social media platforms are a good tool to share information about organic. One expert suggested "*there should be an organic flag bearer representing the organic movement, a public figure that raises awareness on organic*". One retailer

expert mentioned that "*using an app or the receipt to show the percentage of organic food bought buy the consumer was a good way to raise awareness about organic and to buy more* ».

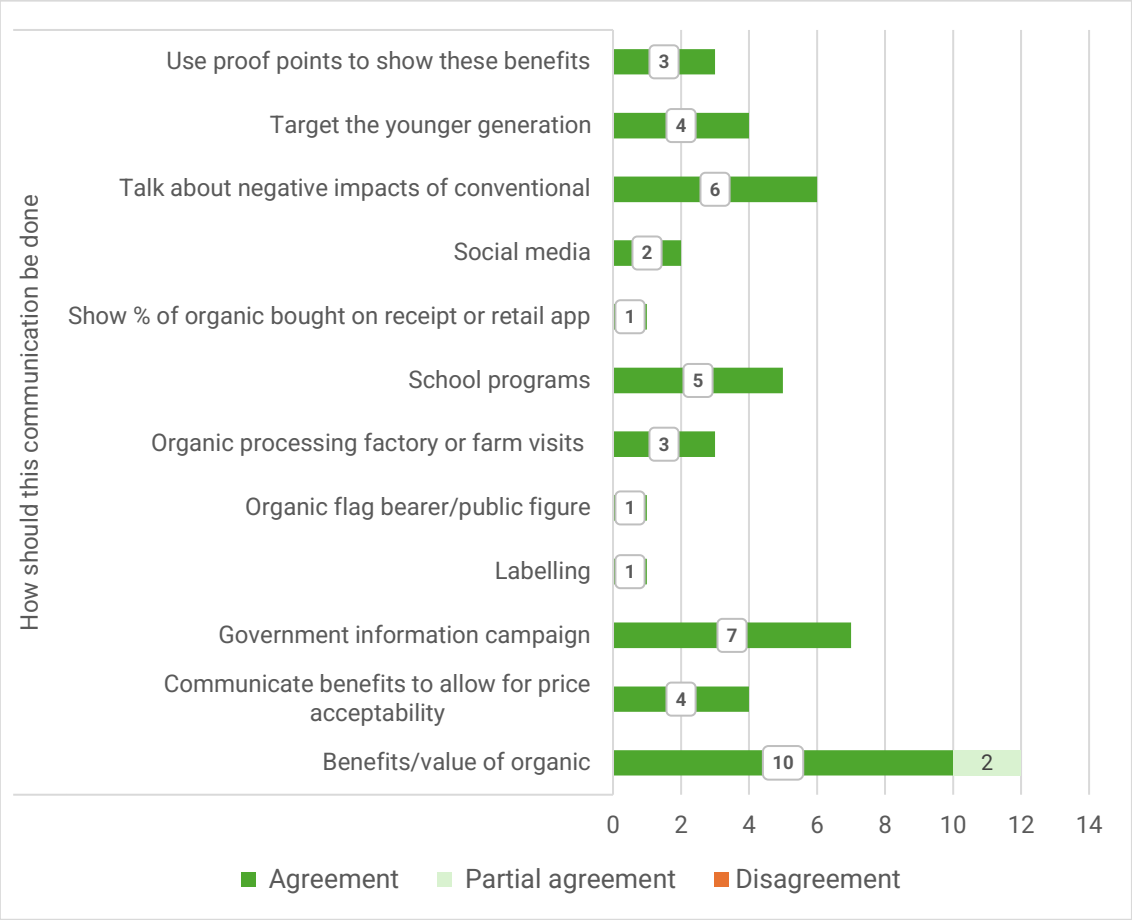

Figure 16 - Level of agreement of experts' opinions about "how should this communication be done"

What benefits of organic should be communicated?

According to 11/29 (37,9%) experts, the main benefits of organic to be communicated is **health** and 10/29 (34,5%) **environmental benefits.** The other benefits mentioned by experts were biodiversity (4/29 – 13,8%), no pesticides (4/29 – 13,8%), animal welfare (4/29 – 13,8%), lower climate impact (4/29 -13,8%), farmer welfare (2/29 – 6,9%), quality of organic products (2/29 – 6,9%), origin (2/29 – 6,9%) and nutrition (2/29 – 6,9%). Taste was also mentioned as a benefit by 3 (10,3%) experts while 3 (10,3%) other experts thought there isn't much difference with conventional taste. Other benefits only mentioned once were economic, no GMOs, solidarity, less additives, water, lower price difference.

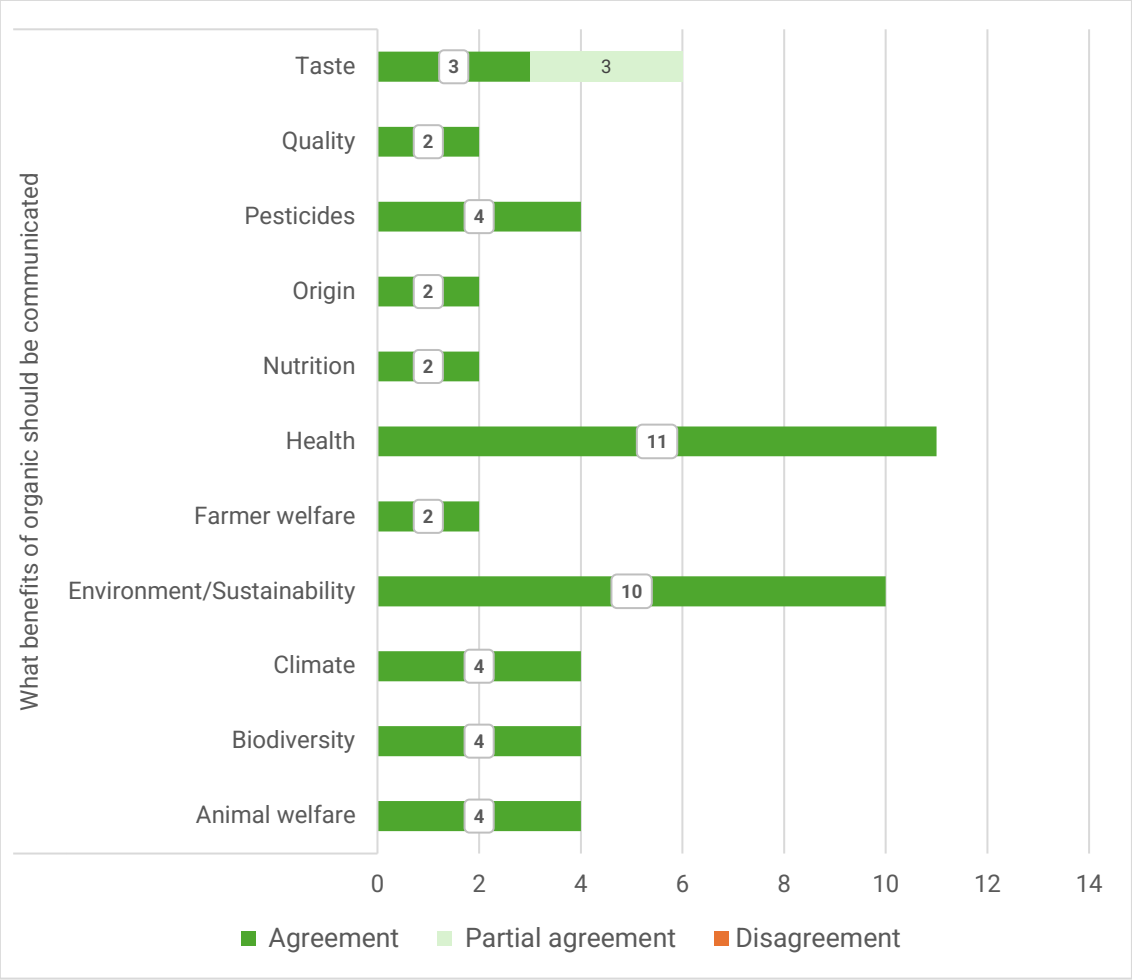

Figure 17 - Level of agreement of experts' opinions about "what benefits of organic should be communicated"

Competing labels

12/29 (41,4%) experts mentioned that **other environmental labels and green claims were confusing the consumer and was an obstacle to organic purchases**, mainly zero residue of pesticides (4/29 – 13,8%), regenerative agriculture (4/29 – 13,8%), and high environmental value (3/29 – 10,3%) (*NB: French label HVE*). These labels often promote specific aspects of sustainability, which can make them appear more straightforward or appealing than the broader organic label. The recommendation is that the organic label could improve by adopting some of the clarity and consumer appeal seen in these other environmental claims, potentially making organic standards easier for consumers to understand and trust. Other green claims mentioned

once were sustainable labels, green labels, climate friendly, welfare friendly, ASC[1]. Another idea was to combine several labels into one like an organic regenerative label. 2 (6,9%) experts disagree with this idea and suggested that green claims could help driving demand. One expert suggested to "*have organic instances lobby against these green claims*".
3/29 (10,3%) experts pointed out the need of regulation on greenwashing/green claims at EU level and that processors and retailers should be allowed to clearly state the organic benefits on the packaging.

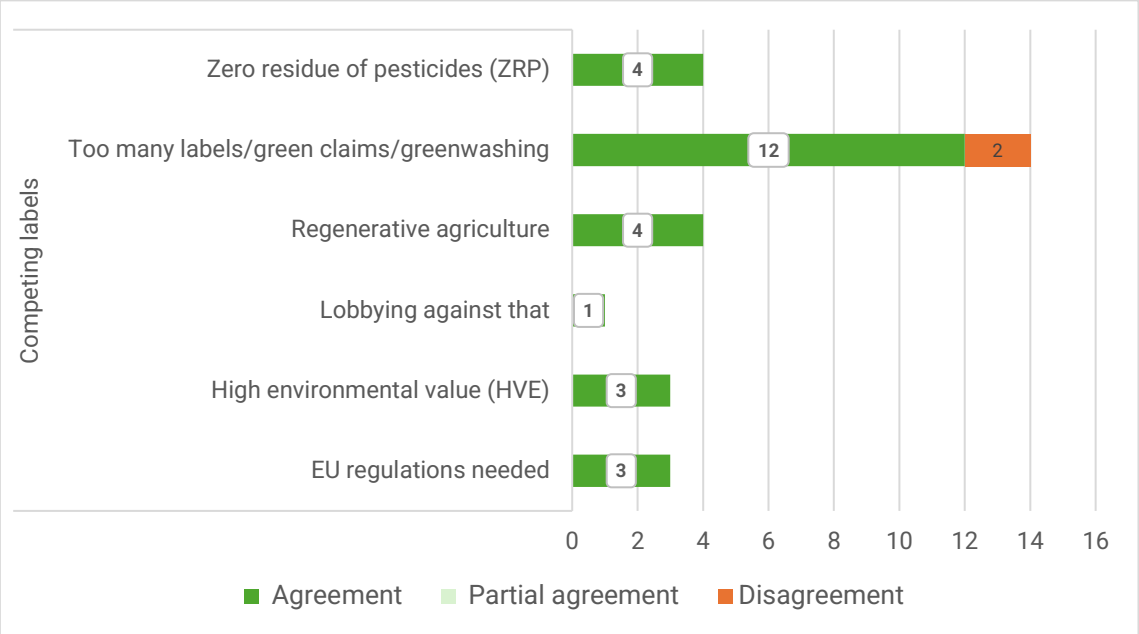

Figure 18 - Level of agreement of experts' opinions about "competing labels"

Transparency

9/29 (31%) experts agreed on the importance to **be transparent on elements of organic products via campaigns** and 4/29 (13,8%) pointed out the importance of transparency on products packaging while one expert suggested not being overly transparent. According to 13/29 (44,8%) experts**, transparency should be done for products origin**, explaining the importance of local and imported products. 4/29 (13,8%) mentioned that organic products should be transparent on farmer's fair pricing or on relationship with farmers and 2/29 (6,9%) on the environmental impact of the product. One expert recommended an EU obligation for environmental scoring on packaging. More specifically, for 3/29 (10,3%) experts the planet score should be present on every

[1] *ASC (Aquaculture Stewardship Council) is an independent organization that establishes a protocol for farmed seafood while ensuring sustainable aquaculture. The ASC provides sustainable and responsible aquaculture producers with a certification and labelling system that assures consumers that the seafood they purchase is environmentally sustainable and socially responsible.*

product to show environmental impact while for 2/29 the ecological footprint should be visible on products.

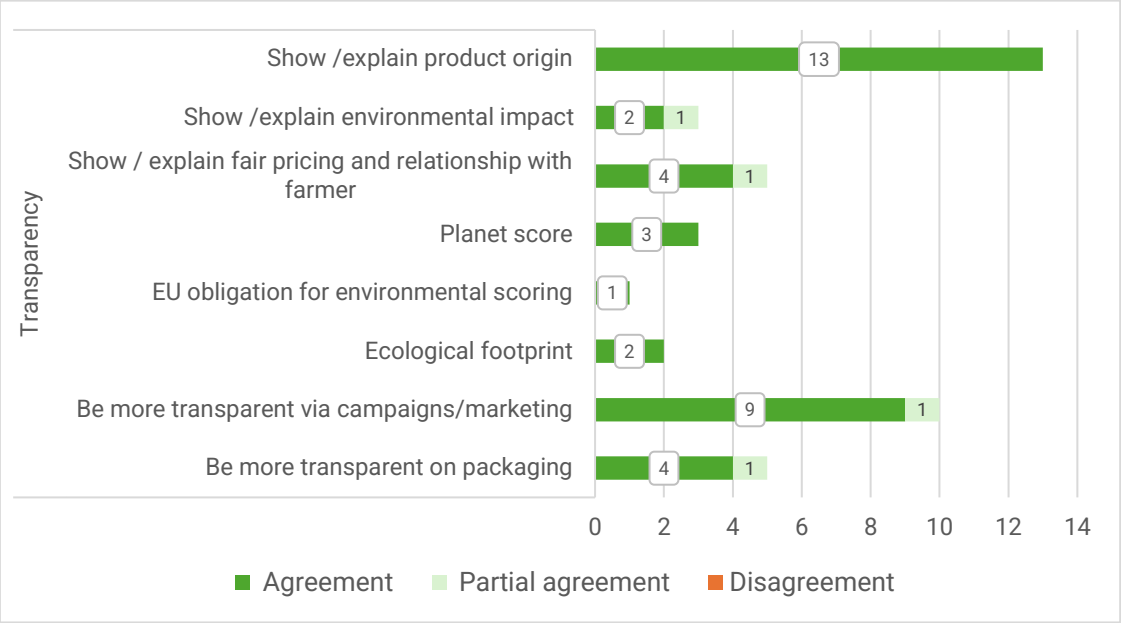

Figure 19 - Level of agreement of experts' opinions about "competing labels"

Increasing communication budget

5/29 (17,2%) experts believed there is not enough communication budget given to organic instances and that retailers should dedicate more of their communication budget to organic. One expert said "*the government should give subsidies to sustainable private labels in order to communicate more on organic*".

Figure 20 - Level of agreement of experts' opinions about "increasing communication budget"

Points of consensus

The recommendations set out below aim to strengthen the points of consensus while taking into account the differences identified, in order to maximize the effectiveness of communication efforts in favour of organic farming:

- **Importance of Communication:** a strong majority (24/29 experts, 82%) stressed out the importance of communication to raise consumer awareness of organic products and increase demand. This is a major point of consensus.
- **Role of Government**: 19 experts (65%) concluded that governments should play a central role in this communication showing a significant agreement on the involvement of public authorities.
- **Problems with competing labels**: 12 experts (41%) shared the concern that other environmental labels (such as "zero pesticide residue" and "regenerative agriculture") create confusion among consumers, hindering organic purchases.
- **Transparency:** A consensus was shown around the importance of transparency, with 9 experts (31%) insisting on transparency in campaigns and 4 experts (13%) in product packaging.
- **Use of the Media and information campaigns**: 7 experts (24%) stressed out the importance of information campaigns at national or European level, broadcast via television or other advertising media reflecting moderate agreement on the channels of distribution.
- **School education**: 7 experts (24%) suggested support for the integration of organic farming into educational programs to raise awareness on organic.
- **Comparison of Benefits of Organic vs. Conventional:** 6 experts (20%) suggested that communication should include a comparison between the benefits of organic and the negative impacts of conventional farming, showing a trend towards comparative education.

Points of divergence and minority opinions

Several differences also emerged from our experts' opinions:

- **Coordinated communication:** Although communication was considered essential, two experts (2,9%) expressed doubts about the possibility of coordinated communication between all the players, notably because of the diversity of stakeholders.
- **Targeting younger generations:** Only 4 experts (13,8%) expressed that communication should primarily target younger generations, indicating a divergence on priority target groups.
- **Need for scientific proofs:** Only three experts (10,3%) mentioned the needs to scientifically prove the benefits of organic to gain consumer trust, highlighting a lack of consensus on the importance of an evidence-based approach.
- **Confusion with competing label:** While 12 experts (41,4%) found competing environmental labels confusing, two experts (6,9%) did not see it as a problem, and one expert suggested combating misleading ecological claims through lobbying.
- **Increased Communication Budget:** Only 5 experts (17,2%) mentioned that the budget allocated to organic communication is insufficient, with different ideas on where the funding should come from (government, retailers).

Recommendations

Based on the points of consensus and divergence identified by our panel of experts, several recommendations concerning communication can be made:

- **Reinforcing government communication**: given the consensus on the role of government, it is crucial to strengthen government communication on organic, integrating **coherent information campaigns on both a national and European level** and while addressing the lack of involvement of mixed players in promoting organic produce.
- **Educational campaigns:** introducing educational programs on organic farming into schools and universities could solidify the long-term impact of awareness-raising. Visits of farms and factories should be encouraged to reinforce consumer commitment and awareness.
- **Use of social media and leading figures:** these platforms should be further exploited to reach a wider audience, notably by engaging public figures or organic "standard-bearers".
- **Clarification and simplification of labels**: to reduce consumer confusion, focus should be given to **harmonizing or simplifying organic labels**, taking inspiration from labels that are clearer for consumers. Efforts to clearly distinguish organic from other environmental labels would also be beneficial.
- **Improved transparency:** in response to consumer demand for transparency, communication on the geographical origin of products, their environmental impact and fair-trade practices through clear, comprehensible labelling on packaging should be improved.
- **Increase communication budget:** ways of increasing the budget devoted to the organic communication should be explored, including through government subsidies or increased retailer engagement, to ensure broader and more effective communication campaigns.

3.2. Affordability and price

What do the experts say

18/29 experts agreed that **price is a blocker in the development of the organic market and that it is important to make organic products more affordable.** However, three experts focused on communicating the advantages of organic to promote the willingness to pay for organic products as many organic products do not have high prices.

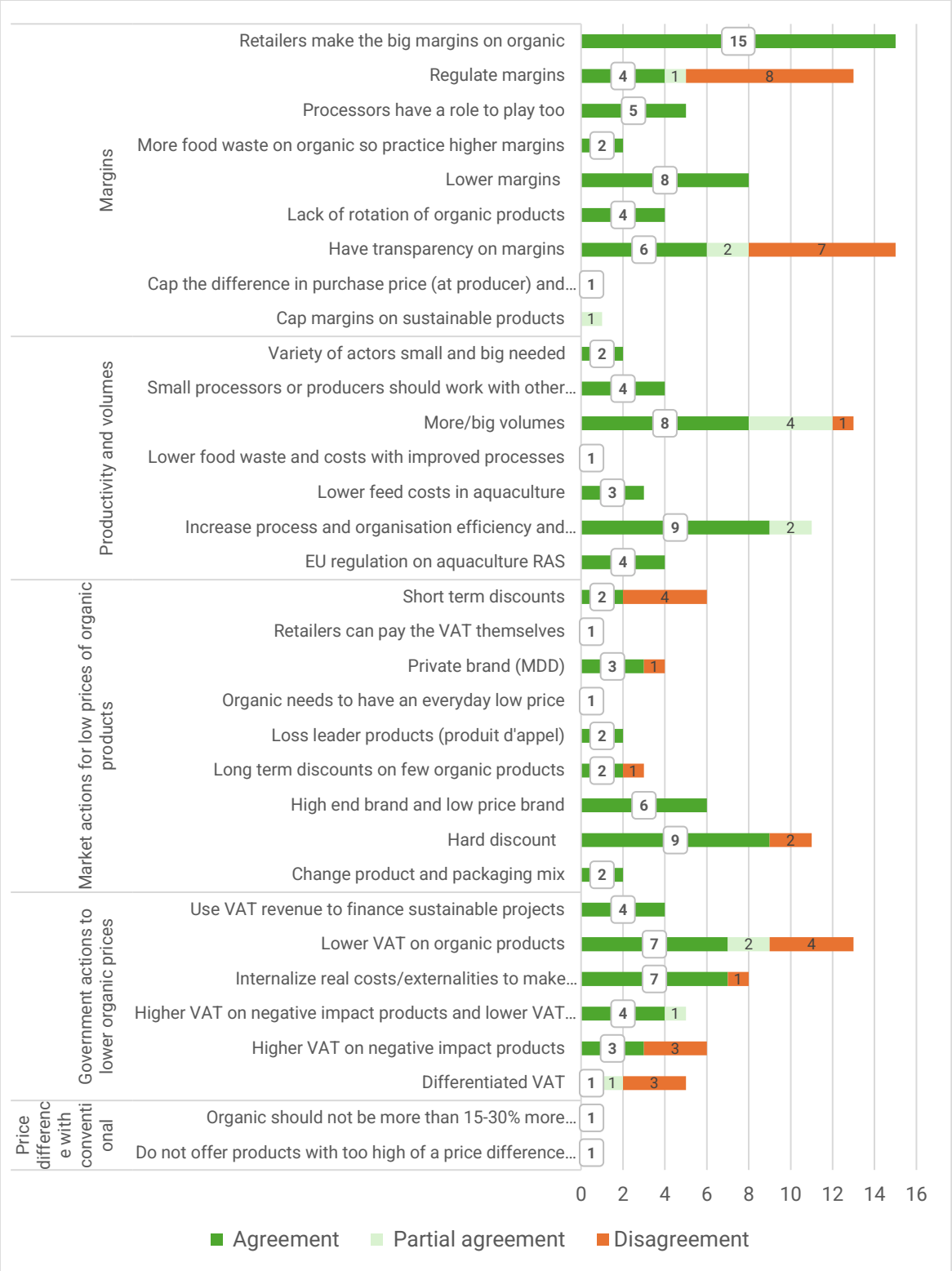

Figure 21 - Level of agreement of experts' opinions about "affordability and price"

Price difference with conventional

Only one expert has commented on this subject, suggesting to "*only offer new organic products where the price difference is not too high compared to conventional products*" and to "*fix organic prices with a price difference maximum 15-30% more than conventional*".

Margins

15/29 experts (51%) believed **a hurdle to lower organic prices is that retailers make big margins on organic products**. However, 4/29 (13,8%) experts explained these higher margins by the lack of product rotation [2] of organic products.
2/29 (6,9%) explained the higher margins accounting for more food waste on organic due to lack of product rotation.
5/29 (17,2%) experts suggested that processors also have a role in lowering organic product prices by either lowering their margins or by advising retailers on which price to fix.
8/29 (27,6%) experts agreed that **it is necessary to have lower organic margins than what is currently practiced**.
6/29 (20,7%) experts pointed out that downstream actors should be transparent on their margins, while 2 experts expressed doubts about its feasibility. Interestingly, 7/29 experts strongly **disagree with forcing downstream actors to be transparent** about their margins. They argued that this could a counter effect leading retailers or processors choose not to sell organic products because the added pressure. Additionally, they believe that transparency would not be enough to lower margins and organic prices.
4/29 (13,8%) experts suggested that the government should regulate margins on organic. While agreeing, one expert expressed concerns about how to ensure that producers would still receive premium prices. However, 8/29 experts completely disagreed with that measure saying that the market can regulate itself without government intervention.
One expert suggested that in order to regulate margins "*the government should cap margins on sustainable products*", but he then mentioned that it might be a bit too radical. The same expert also suggested that to regulate margins, "*the government should cap the difference between the purchase price (i.e. at the producer level) and the sale price (at the store level).*"

[2] *Product rotation on shelves refers to the practice of regularly moving products to ensure that older stock is sold before newer stock. This helps to maintain product freshness and reduce waste. It involves placing newer items behind older ones on the shelves, so customers are more likely to pick the older products first.*

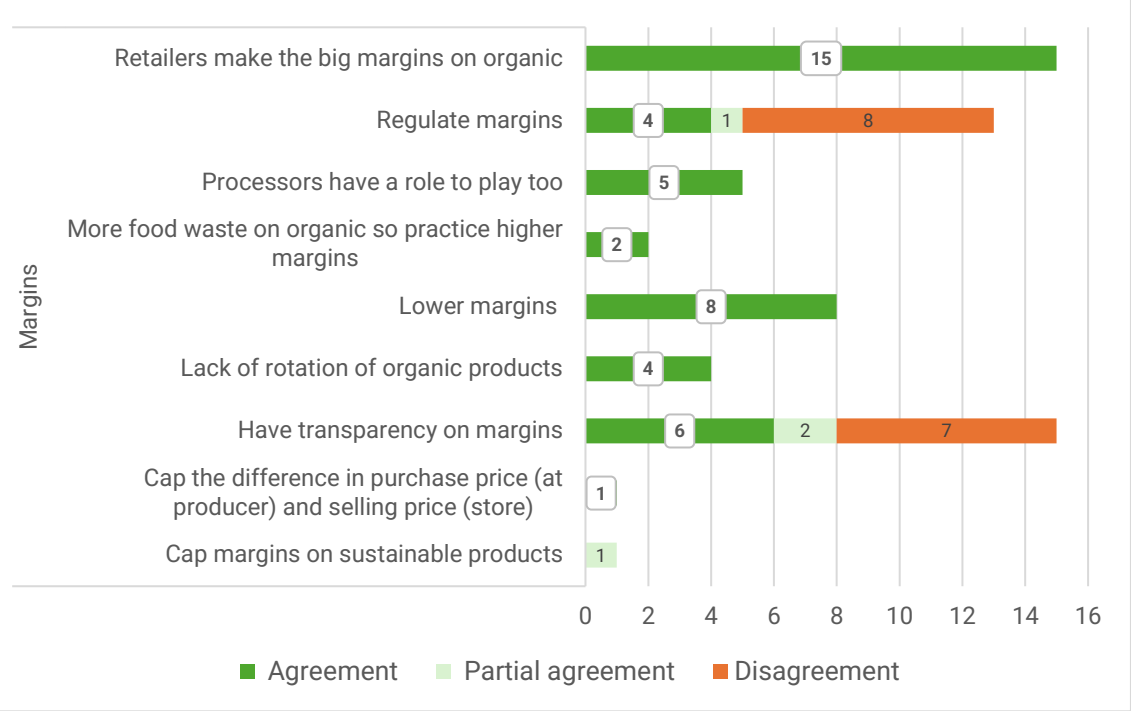

Figure 22 - Level of agreement of experts' opinions about "margins"

Market actions for low prices of organic products

2/29 experts suggested short term discounts as a good tool to make organic products more affordable, but 4/29 (13,8%) experts disagreed saying it is not a lever and it does not contribute to changing the price image of organic on the contrary it shows organic is only affordable on discount.
2/29 believed long term discounts should be practiced on a few organic products, but for 1 expert discounts in general are not a lever.
2/29 experts suggested that more organic products should be sold at cost price and that these should be displayed in discount magazines.
6/29 recommended that one of the strategies to make organic products more affordable is to offer both a high-end organic brand and a low-end organic brand. The low-end organic brand would be of lower quality and less local/regional offer but would be also a cheaper price. These brands can be created together between retailers and processors.
1 expert mentioned that organic should have an everyday low price.
3/29 (10,3%) experts suggested that the retailers' private brand is a good lever to offer organic products at a low price, but 1 expert disagrees as it would prevent the development of processor brands.
9/29 (31%) experts believed that **selling organic products via hard discount is a good lever for making organic products more affordable**. However, 2 (6,9%) experts disagree arguing that this approach would result in someone losing money within the value chain.
2/29 (6,9%) experts suggested changing organic products packaging size or quantity inside the packaging in order to have organic products appear cheaper than conventional products.
One expert suggested "*instead of having the government lower the VAT on organic products that the retailers pay themselves the costs of the organic VAT instead of having the consumer pay*".

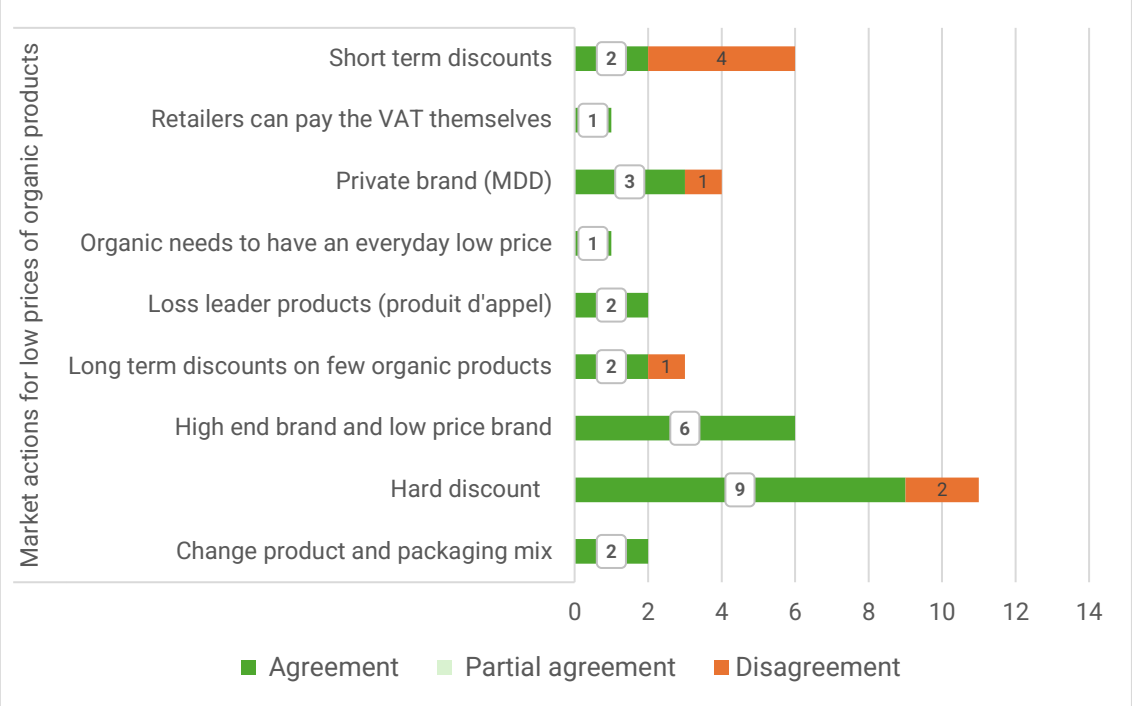

Figure 23 - Level of agreement of experts' opinions about "market actions for low prices of organic products"

Government actions to lower organic prices

7/29 (24,1%) experts agreed that to lower organic prices **the government should lower the VAT organic**, while 2/29 (6,9%) agreed but doubted the feasibility due to lack of government commitment. 4/29 (13,8%) disagreed because this approach could lead to fraud and it would not have a big impact on lowering the price. 3/29 (10,3%) experts disagree with having a differentiated VAT as this needs huge government commitment and it won't happen.
4/29 (13,8%) experts agreed that increasing VAT on negative impact products and lowering VAT on positive impact products would be a good lever to lower organic price and increase value of organic products. One expert stated "*it will be hard to do it as it's hard to increase VAT on food*". Moreover, 3/29 (10,3%) experts agreed that the VAT on negative impact products should be increased, for example on conventional products or products with pesticides while 3/29 (10,3%) experts disagree arguing that as this will not be accepted by consumers and conventional processors or producers.
4/29 (13,8%) experts suggested to use the extra government revenue coming from a higher VAT on conventional products to finance sustainable projects like agricultural transition, research for organic and health sector.
7/29 (24,1%) experts mentioned that **it is necessary to internalize the real costs/externalities of agricultural practices in order to make conventional agriculture and products more expensive compared to organic**, for example via taxation. 1 expert disagreed saying polluters should not pay for the pollution they cause.

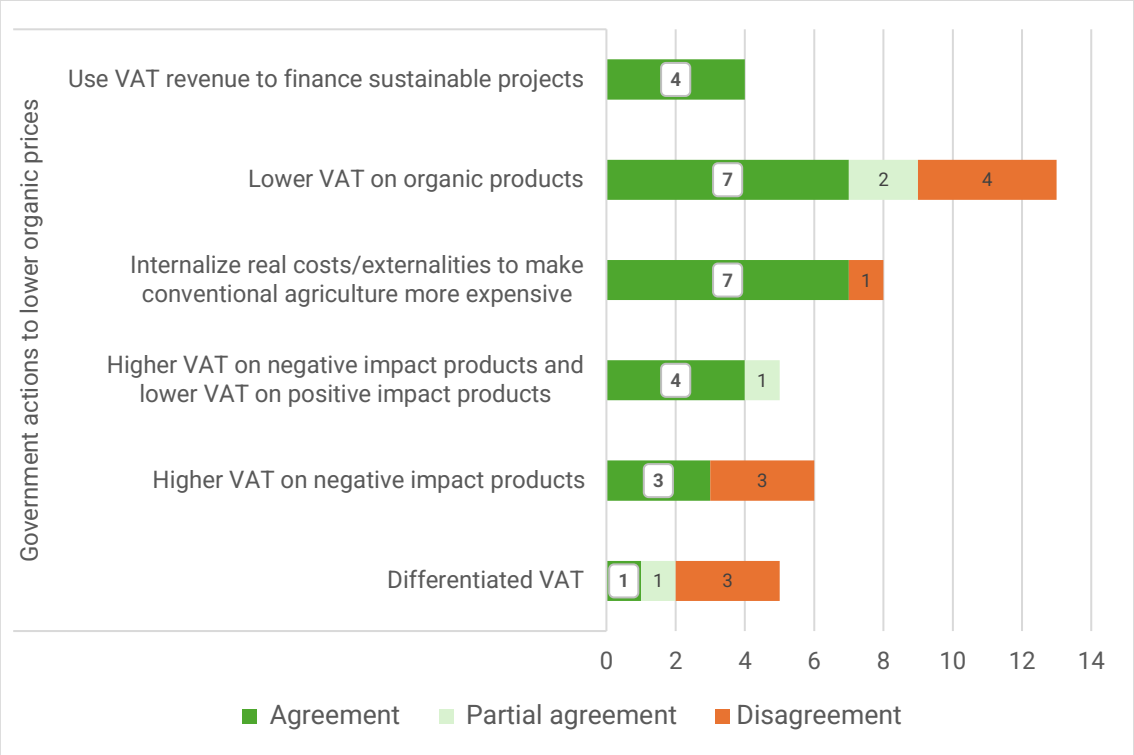

Figure 24 - Level of agreement of experts' opinions about "government actions to lower organic prices"

Productivity and volumes

9/29 (31%) experts mentioned **increasing process and organization efficiency and productivity with more productive technologies as a lever to make organic products cheaper**, but 2/29 disagreed arguing that it could only apply if demand increases.
One expert believed that lowering food waste could help reduce price of organic products, suggesting improving conservation, packaging, processes and supply chain.
8/29 (27,6%) experts believed that to lower organic product prices it is important to **decrease costs and have economies of scales by treating bigger volumes**. However, one expert disagreed, and 4/29 (13,8%) experts expressed doubts saying that in aquaculture or in poultry production it won't be possible to have more volumes due to organic regulation on space for animal welfare.
4/29 (13,8%) experts said that for small processors or producers it is important to share tools in order to lower the costs and the prices of organic products.
2/29 (6,9%) said it is important to have a variety of small and big players in order to have low costs.

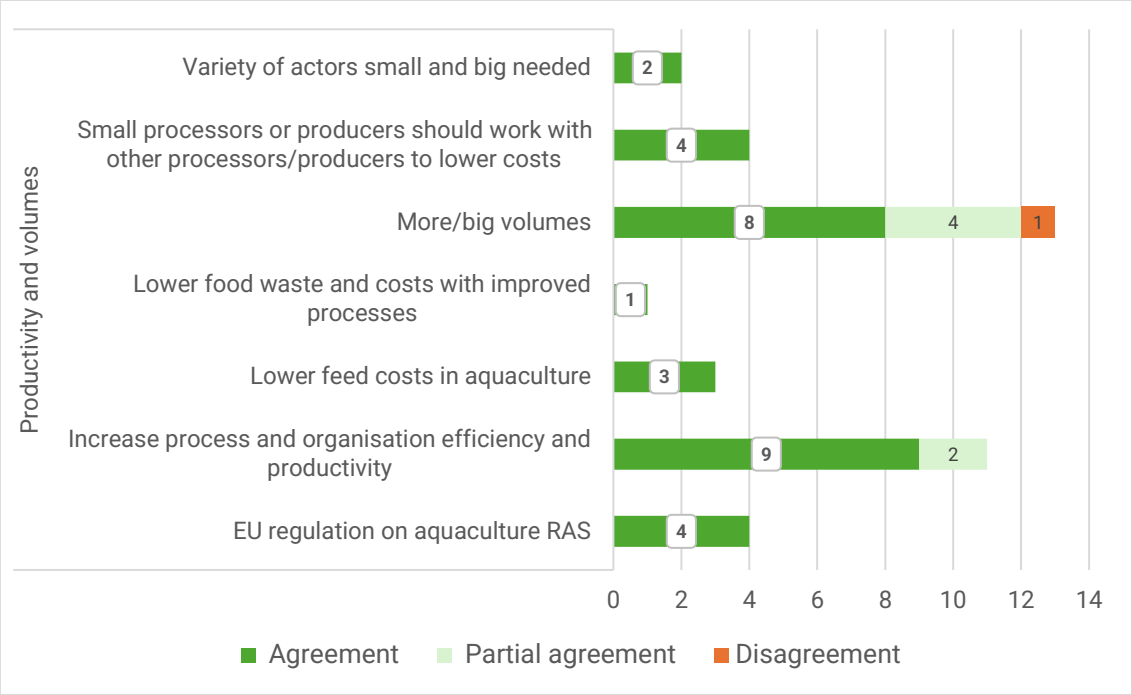

Figure 25 – Level of agreement of experts' opinions about "government actions to lower organic prices"

Points of consensus

Most experts (18/29 – 62,1%)) agreed that **price is a major obstacle to the development of the organic products market**. The need to make organic products more affordable is therefore widely recognized. However, a minority of experts (3/29 – 10,3%) put this point into perspective, suggesting that price should not be the main priority for growing the sector, especially as some organic products are not significantly more expensive than their conventional equivalents. These experts suggested **more targeted communication efforts on the benefits of organic products could contribute to better price acceptance by consumers**.

Points of divergence and minority opinions

A few differences also emerged from our experts' opinions:

- **Price differentials with conventional products**: One suggestion involved restricting new organic products to those with a minimal price difference compared to conventional products, while the other suggested establishing a maximum allowable price difference between organic and conventional products. There was disagreement about the feasibility and desirability of regulating margins to reduce organic prices, with some experts arguing for government intervention, while others believing the market can regulate itself.

- **Margins and value distribution**: Some experts attributed retailers' high margins to a lower turnover of organic products, resulting in increased food waste, and others simply speak of an additional profit opportunity for distributors. Opinions also differed on the issue of

margin transparency, with some seeing it as a solution for reducing prices, while others feared that it would encourage retailers to stop selling organic products.

- **Market actions to reduce prices**: Opinions were divided on the effectiveness of promotions (both short and long-term) in making organic products more affordable. Some experts saw promotions as a useful tool, while others believed they do little to change the price image of organic. Experts' opinions also differed on the impact of private labels and organic products sold in hard discount outlets with some seeing them as levers for making organic more accessible, while others fearing that they could lead to losses in the value chain.

- **Government actions:** The use of differentiated VAT to reduce the price of organic products was the subject of much debate. While some experts believed it as an effective and emblematic measure, others doubted its implementation and real impact. On the other hand, the proposal to increase VAT on negative-impact products to finance sustainable projects was also controversial, with some experts believing that it would not be accepted by consumers.

- **Productivity and volumes**: Some experts doubted the effectiveness of a strategy aimed at increasing the efficiency and productivity of manufacturing processes, particularly in certain sectors such as aquaculture or organic poultry production, where animal welfare regulations limit the scope for increasing volumes.

Recommendations

While there was a broad consensus that price is an obstacle to the development of the organic market, different opinions on the appropriate actions suggest that the following recommendations should be viewed as potential avenues for exploration rather than definitive solutions:

- Implement public policies to regulate margins including limiting margins on organic products to ensure more affordable prices.
- Encourage margin transparency: although controversial, margin transparency could be tested, ensuring that it does not discourage organic sales. Voluntary initiatives by retailers already exist (for example, Omie[3]).
- Differentiated private label strategies: Developing both high-end and low-end organic brands could help meet the needs of different consumer segments.
- Tax review: adjusting VAT to favour positive-impact products could be explored, while ensuring the political and social acceptability of this measure.
- Strengthen economies of scale: Promote the pooling of tools between small producers and processors to reduce costs.

[3] *Omie is a French brand of organic food products, sold online and in organic stores, having chosen to display the origin of the ingredients, the place of processing as well as the remuneration of producers and processors.*

These measures must be approached with caution, taking into account market dynamics and potential side-effects for the entire organic value chain.

3.3. Innovation on organic products

What do the experts say

14/29 (43,8%) experts believed that **innovation on organic products is key to raising demand** for organic products especially because **organic consumers are curious about new products and it can bring in new consumers**, while one expert disagreed arguing that it would not be effective since retailers are decreasing assortments.

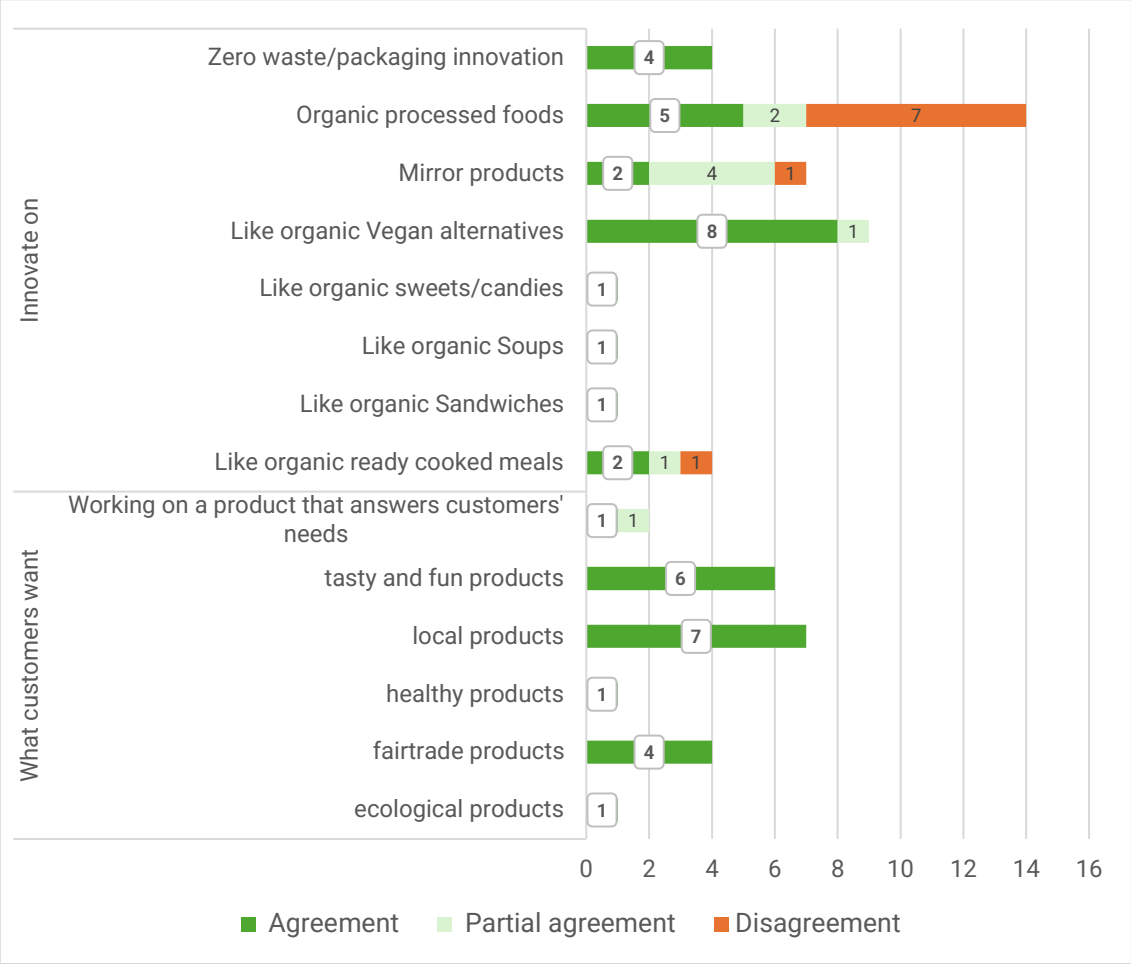

Figure 26 - Level of agreement of experts' opinions about "innovation on organic products"

What do consumers want?

7/29 (24,1%) experts believed that consumers preference is on buying local products, sometimes more than organic products, so **organic products should be as local as possible**.
6/29 experts agreed that **consumers want products that are tasty** and fun. Organic has to answer consumers' needs and the consumers' idea of organic not being tasty.
4/29 (13,8%) experts mentioned the importance for consumers to buy fairtrade products or products that offer farmers good wages and working conditions.
One expert said "*consumers are really attached to buying healthy products*". One expert said "*consumers want to buy ecological products*".
One expert specifically said "*organic products should be able to answer most of consumers' needs*" but another said on the contrary that organic products should not try to answer all of these needs as it will make them even more expensive and too niche.

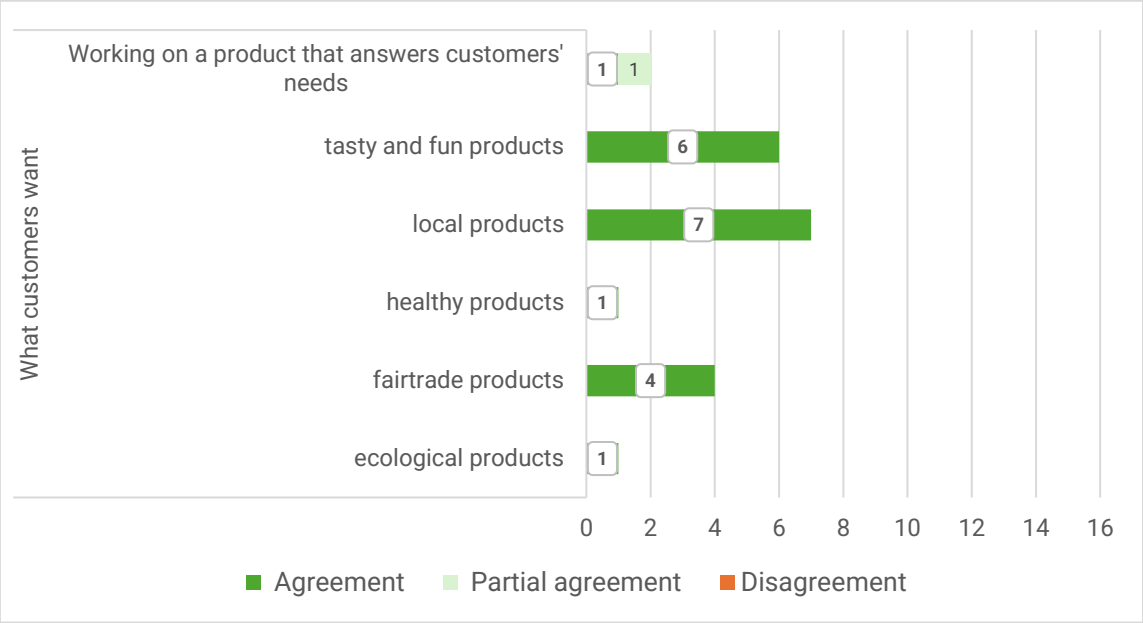

Figure 27 - Level of agreement of experts' opinions about "what do consumers want"

How to innovate

8/29 (27,6%) experts believe **the vegetarian and vegan trend is a good lever for organic products**, as vegetarian and vegan consumers care about the environment and align with the organic values. Plant based diet is recommended by environmental scientists. However, one expert disagreed on the vegetarian and vegan as trend.
4/29 (13,8%) experts suggested that innovation on organic products should not only concern processed food but also packaging towards zero waste and alternative packaging.
2/29 (9%) experts mentioned that organic should take inspiration from conventional products that sell well and replicate them in an organic version, the "mirror products". However, one expert disagreed, and 4/29 (13,8%) experts believed that although the "mirror products" is not the most

innovative solution it should still be done for less processed foods. Also, products should be adapted when sold to an organic supermarket versus a conventional one.
2/29 (6,9%) experts said, "*we need more organic ready cooked meals*", one expert disagreed saying people need to be taught how to cook themselves, one expert said "*that organic ready cooked meals were a good idea, but they should not be overly processed and made with fresh local products and made in an artisanal way, not industrially processed*".
On specific items, one expert suggested to have more organic sandwiches, one expert suggested to have more organic soups, and one expert suggested to have more organic sweets/candies.

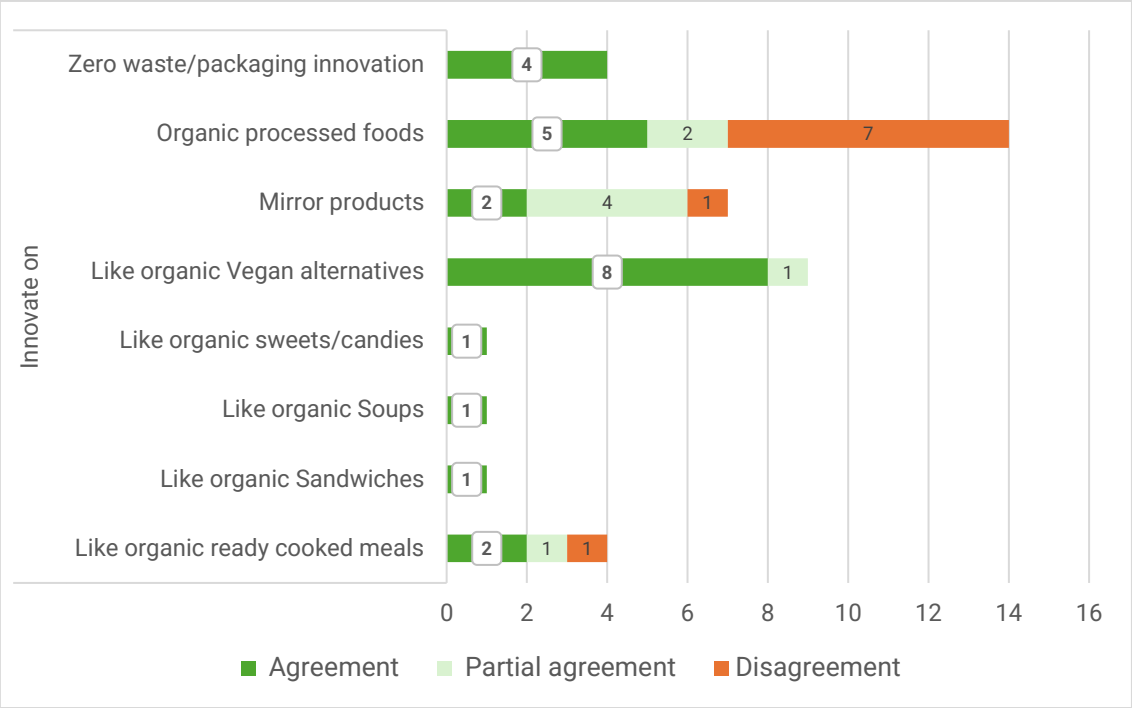

Figure 28 - Level of agreement of experts' opinions about "how to innovate"

Points of consensus

Innovation in organic products was seen as a lever for stimulating demand, with 14 out of 29 experts agreeing on its importance. These experts pointed out that organic consumers are often curious and open to trying new products, which could attract new consumer segments. In addition, the current trend towards local and vegetarian/vegan products was seen as a growth opportunity for the organic sector.

Points of divergence and minority opinions

Experts had different opinions on how to carry out innovation. Some experts were in favour of developing organic convenience foods, while others gave more importance to educate consumers to cook by themselves. Some experts expressed reluctance to develop processed products and warned of the ultra-processed food issues. Similarly, there was disagreement about the value of reproducing conventional products in organic versions ("mirror products"), with divided opinions on the appropriateness of this approach.

Another point of divergence concerned the objective of meeting consumer needs: some experts believed that organic products should strive to meet all consumer expectations, while others warned that this could make organic products too expensive and limit them to a niche market.

Recommendations

Based on the consensus and divergences of our experts, the following recommendations were drawn:

- Developing innovative organic products: Given consumers' interest in new products, it would be beneficial to launch organic products that meet both current trends (such as vegetarianism and the development of plant-based protein alternatives) and preferences for local products. However, these innovations must not lead to ultra-processed or ultra-formulated products, but rather to products with less additives. This strategy could also reach non-organic consumers, aware on less processed foods. Moreover, it is essential to maintain a balance between innovation and costs, to avoid products becoming too expensive.
- Strengthen education and awareness: Rather than focusing solely on processed products, it could be useful to promote culinary education initiatives around organic products, thereby reinforcing the perceived value of these products.

3.4. Giving more visibility to organic products

What do the experts say

15/29 experts believed that **giving more visibility to organic products is a real necessity** to develop organic market and demand.

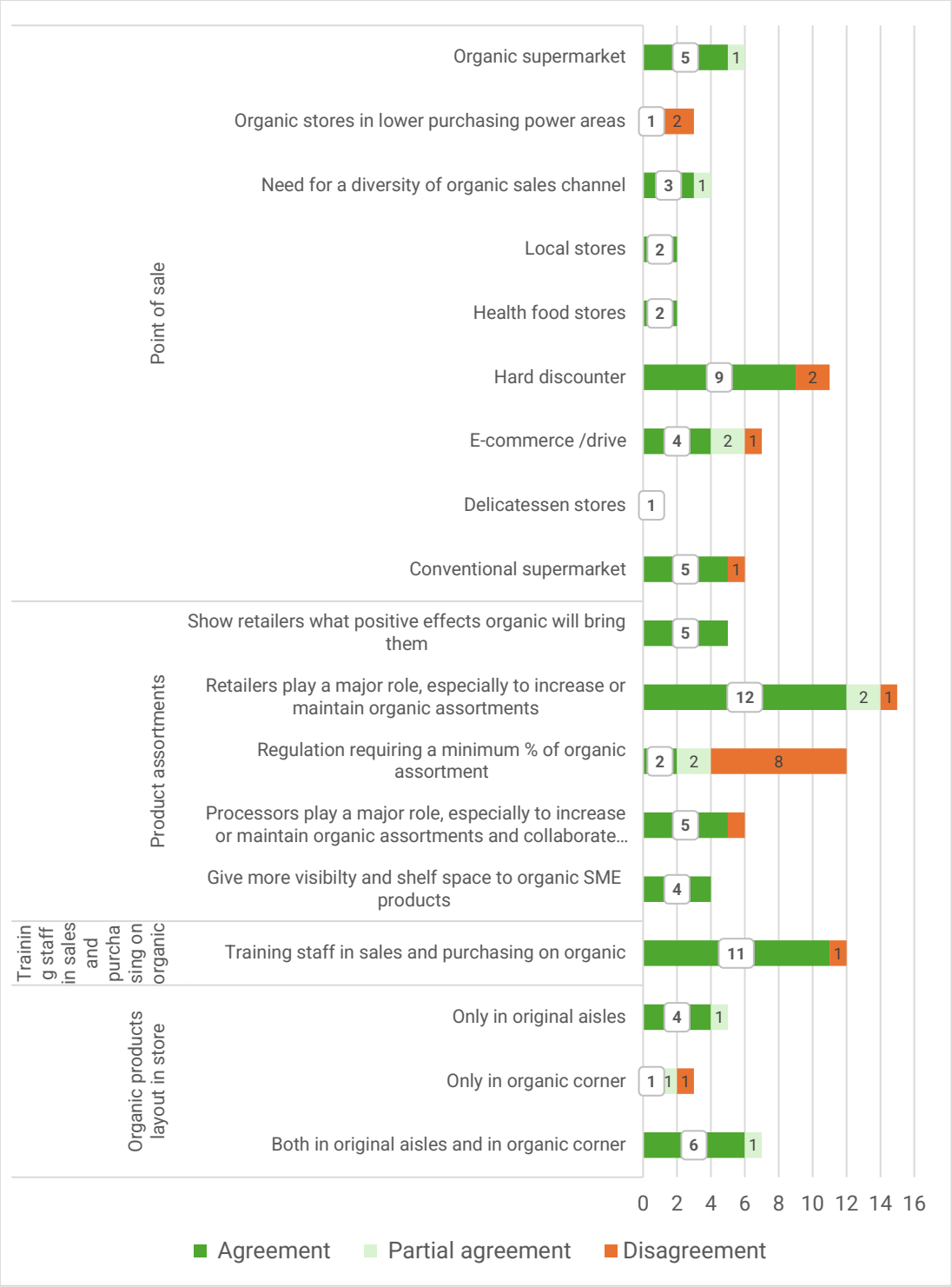

Figure 29 - Level of agreement of experts' opinions about "giving more visibility to organic products"

Product assortments

12/29 (41,4%) experts agreed that retailers are playing a major role, especially to increase or maintain organic assortments. Organic products must be available to consumers where they usually buy, and shops need to be located in a suitable area. 4/29 (13,8%) experts mentioned that retailers should give more visibility and shelf space to organic product. 2/29 experts agreed but argued that because shelf space is limited, retailers would have to decrease conventional assortment.
5/29 (17,2%) experts mentioned that processors also play a major role, especially to increase or maintain organic assortments and to collaborate with retail. One expert does not agree with the role of retailers or processors and argued that "*it's consumers who shape the demand*".
5/29 (17,2%) experts mentioned that it is important to make retailers aware on the added value of organic products. Processors or government can be involved in demonstrating to retailers the competitive advantage and economically sustainability to reach organic consumers with higher willingness to pay and purchase.

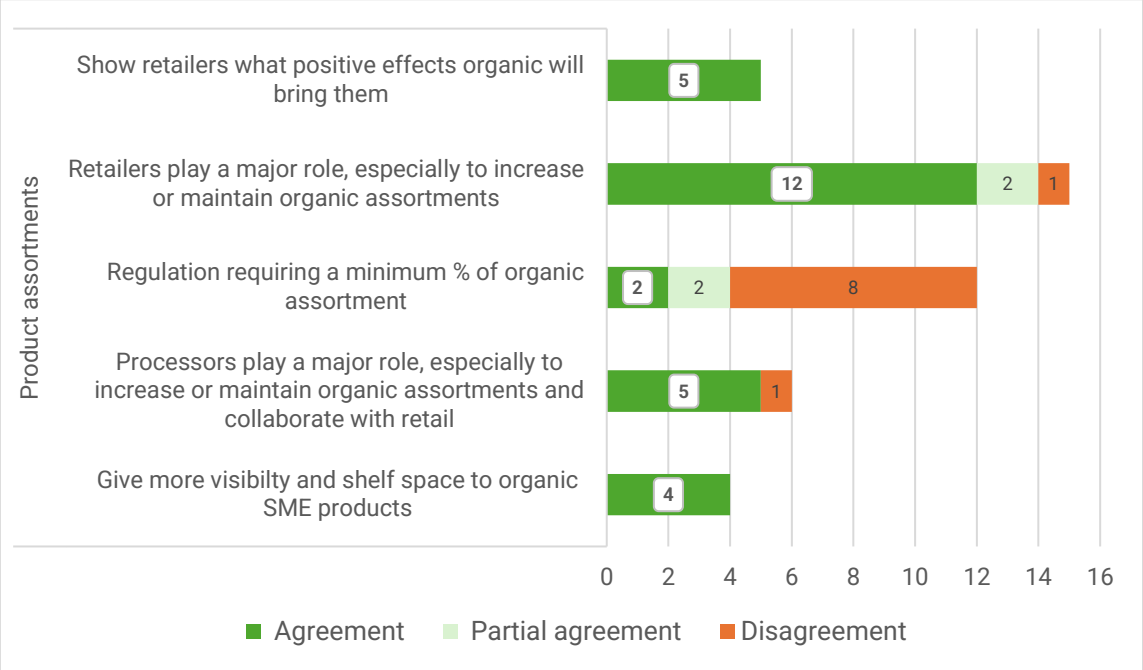

Figure 30 - Level of agreement of experts' opinions about "product assortments"

Points of sale

7/29 (24,1%) experts cited e-commerce and drive as distribution channels to be developed to improve the visibility of organic products among consumers. 4/29 (13,8%) agreed that e-commerce and drive are important for the organic development. 2/9 experts partially agreed, precising that e-commerce is a nice way to broadcast the organic products, and that processors and retailers should go further in digitalization (applications, IA, QR code…).
5/29 (17,2%) believed it is important to continue to develop organic supermarkets because it offers more stable consumers than conventional stores. One expert partially agreed and argued

that "*organic supermarkets do not offer as much potential to grow organic market as conventional stores*".
5/29 (17,2%) believed that conventional retailers have also a major role to boost the organic market development and to contribute to democratizing organic products.
9/29 (31%) mentioned the role of hard discounters, but 2/29 (6,9%) experts disagreed arguing that prices there are far too low. 2 (6,9%) experts also mentioned health food stores (like Wholefoods: a type of grocery shop that sells mainly natural and organic foods, local products and food supplements) as interesting points of sale for organic products.
4 (13,8%) experts insisted on the fact that there is a need for a diversity of organic sales channel.

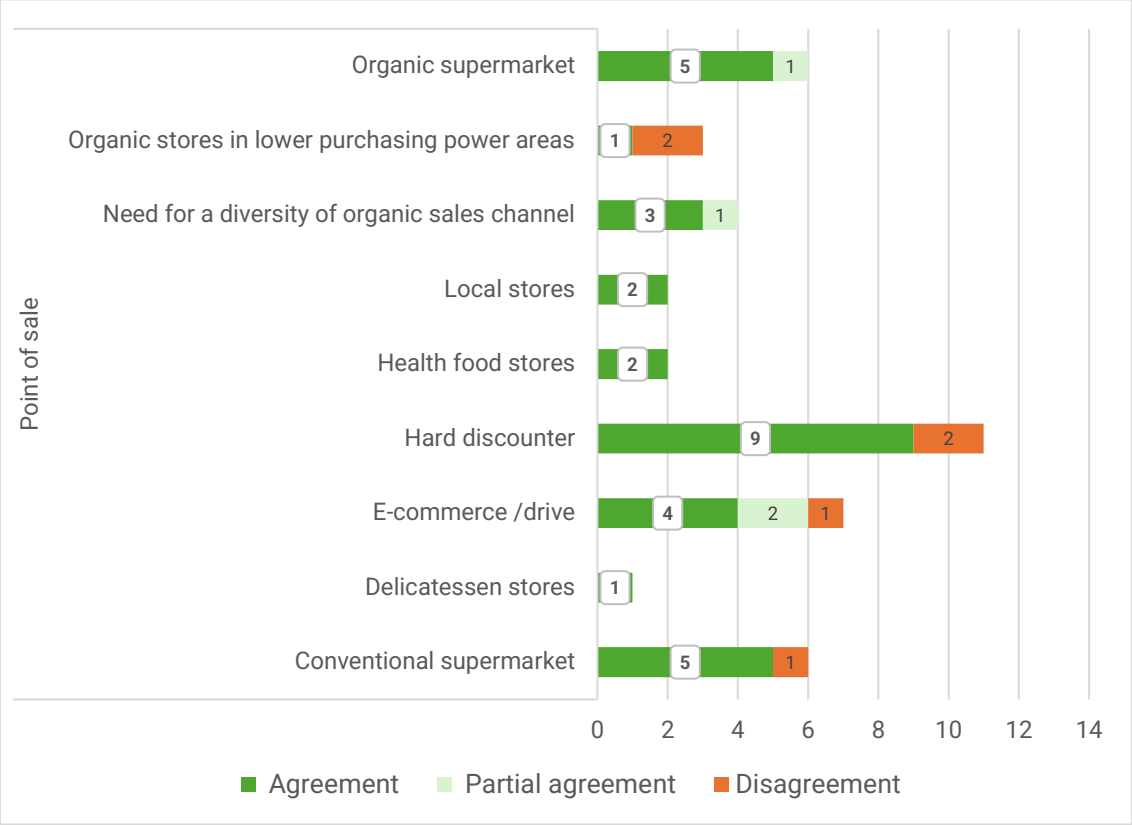

Figure 31 - Level of agreement of experts' opinions about "points of sale"

Organic products layout in store

11/29 (37,9%) experts believed that organic products should have a double presence on the shelves, i.e. be placed both on the original shelves along with their conventional counterparts and in the organic corner, in order to increase demand. This double presence strategy works well when demand is neither too high nor too low, but the original shelf should only be split up for products with a small price difference with conventional products. Shelf space is limited and expensive, so if sales do not keep up, the range will have to be reduced.
4/29 (13,8%) experts believed that organic products should only be found on the original shelves, which would make it possible to compare prices with those of conventional products. But one expert warned that "*this was not a good strategy when the prices of organic products were too high*".

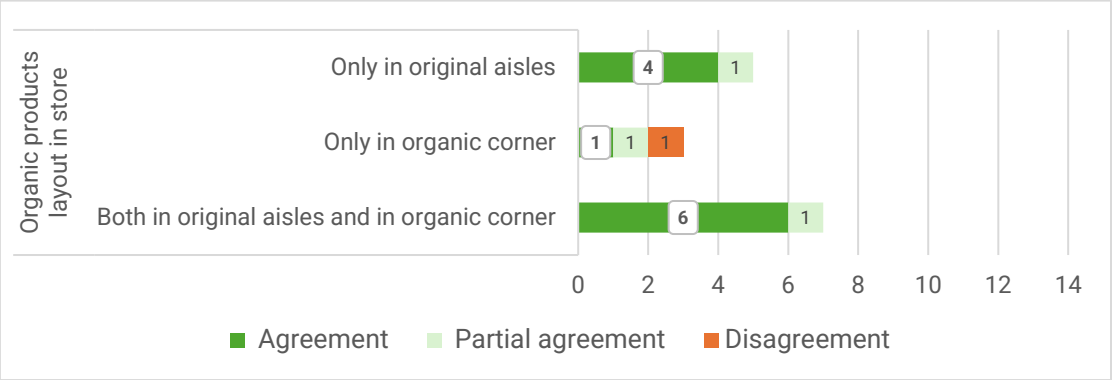

Figure 32 - Level of agreement of experts' opinions about "points of sale"

Training staff

11/29 (37,9%) mentioned the importance of training retailers' staff in sales and purchasing on organic. Buyers need to know the differences and benefits of the label. They need to be trained on the values of organic beyond the price of products. It was also mentioned training on purchasing local products, and training shop assistants on promoting and selling organic products. However, one expert believed that *"training can sometimes be not efficient, and that AI could work better"*.

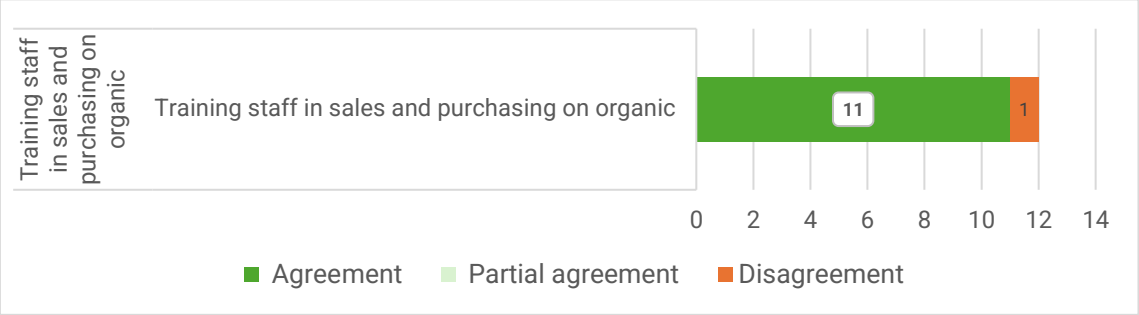

Figure 33 – Level of agreement of experts' opinions about "training staff in sales and purchasing on organic"

Points of consensus

Most experts agreed on the need to **improve the visibility** of organic products **through better in-store display**, the crucial role of retailers by the **work on assortments** and the **place of organic products on store shelves**, and the development of online and physical points of sale. Staff training was also considered crucial.
Experts mostly agreed on the need to **diversify sales outlets, including online**.

Points of divergence and minority opinions

The best strategy for placing organic products in shops was debated with diverging opinions. The market situation and price differences between organic and conventional products seemed to be decisive in the choice of where to place organic products.
There was also divergence on the respective roles of retailers and processors in developing the organic market and improving the visibility of organic products.

Recommendations

The recommendations arising from the convergence of the experts' points of view are:

- Develop a double-shelf visibility strategy while monitoring sales performance.
- Encourage collaboration between retailers and processors to optimize the assortment of organic products.
- Invest in digitizing points of sale and online shopping (including click and collect) to enhance visibility.
- Strengthen staff training programs, while exploring technological solutions such as AI to improve efficiency.

3.5. Boosting organic in out-of-home catering

What do the experts say

21/29 experts agreed on the importance for the share of organic produce in out-of-home catering to increase. Contrary, 2/29 experts believed that processors should sell to wholesalers instead, as the catering industry prefers to centralize purchases and have a single point of contact.

Figure 34 - Level of agreement of experts' opinions about "boosting organic in out-of-home catering"

Government intervention for more organic in out-of-home catering

15/29 (51,7%) experts suggested that it is necessary to impose a minimum organic content in mass catering, as has already been done in some EU countries. The Egalim law[4] was often cited by French experts. However, the targets set were considered ineffective because they are often perceived as incentives rather than real constraints. The lack of controls and penalties was a key factor in non-compliance. 5/29 (17,2%) experts believed that transparency about the percentage of organic produce should be compulsory, which would allow virtuous examples to be highlighted. Financial incentives require funds, but public services have a limited budget and are therefore difficult to implement; instead, making transparency compulsory by filling in declarations with the % of organic produce could already be a less costly solution.
8 (27,6%) experts mentioned labels as a good way of increasing the percentage of organic food in mass catering offering a competitive advantage and helping to highlight the efforts made. In France, Ecocert has developed the 'en cuisine' label[5], and in Denmark, the Organic Cuisine label[6] allows to show the percentage of organic purchases in collective catering. However, two experts pointed out that there are currently too many labels leading to confusion and red tape.

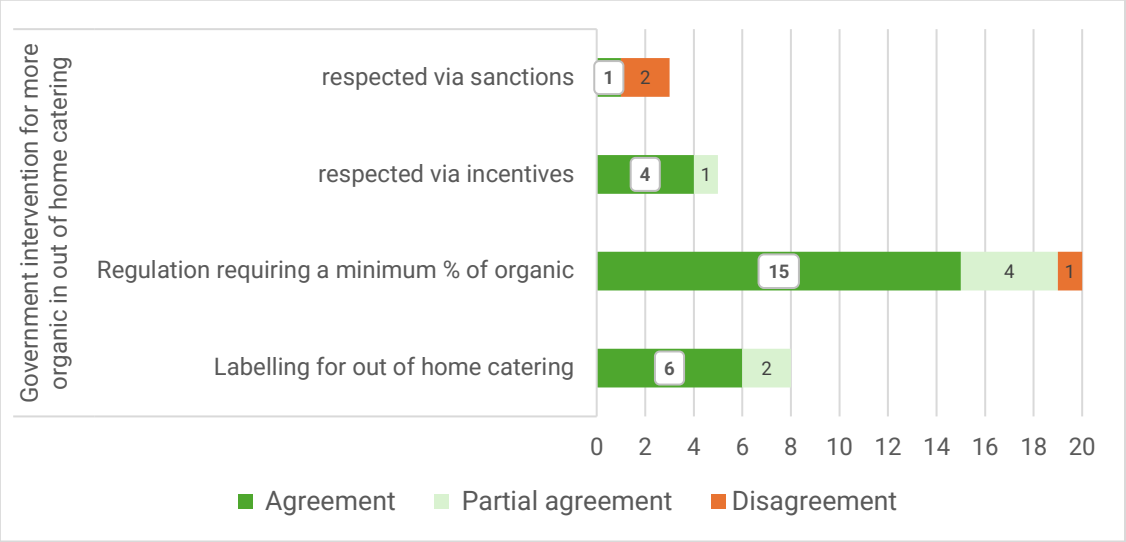

Figure 35 - Level of agreement of experts' opinions about "government intervention for more organic in out-of-home catering"

[4] The french EGalim law is actually called the "law for the balance of commercial relations in the agricultural and food sector and healthy, sustainable and accessible food for all". SinceJanuary 2022, it requires public catering to offer at least 50% sustainable and quality products, including at least 20% organic products. Qualitative and sustainable products are products benefiting from: (i) official quality signs such as protected designations of origin (PDO), the Label Rouge, the protected geographical indication (PGI) or organic farming, (ii) promoting mentions (guaranteed traditional specialty, HVE, farm products, etc.), (iii) products from sea fishing benefiting from the Sustainable Fishing ecolabel.

[5] The Ecocert En Cuisine label promotes collective catering establishments that introduce organic, local and healthy products. This label is designed as a promotion tool, with 3 levels based on the percentage of organic products, the level of supply of local products, the implementation of healthy and sustainable menus.

[6] The Organic Cuisine label is a free, state-controlled labeling system for restaurants. The Organic Cuisine label indicates the total share (in %) of organic raw materials and beverages used in the preparation of the entire menu. Both public and private restaurants can be certified under the Organic Cuisine label scheme. The Organic Cuisine Label comes in three versions; Gold (90-100%), Silver (60-90%) and Bronze (30-60%).

Training, advising and supporting players in their transition

5 (17,2%) experts believed that regional institutions should use training and support to help cooks, canteens and central purchasing bodies to use more organic products. Cooks could also help to train/advise their counterparts. Two experts stated that a gradual introduction of organic products is necessary to gradually learn how to work with them.
Two experts also pointed out that there is a need for support and help in filling in organic percentage declarations.
4 experts mentioned the necessity of knowledgeable local organic producers in their region, but it would require a change in the EU rule prioritising European purchases over local purchases. Finally, 3 (10,3%) experts suggested that it is important to learn how to cut costs in public catering, because the budget per meal is limited and organic can be more expensive.

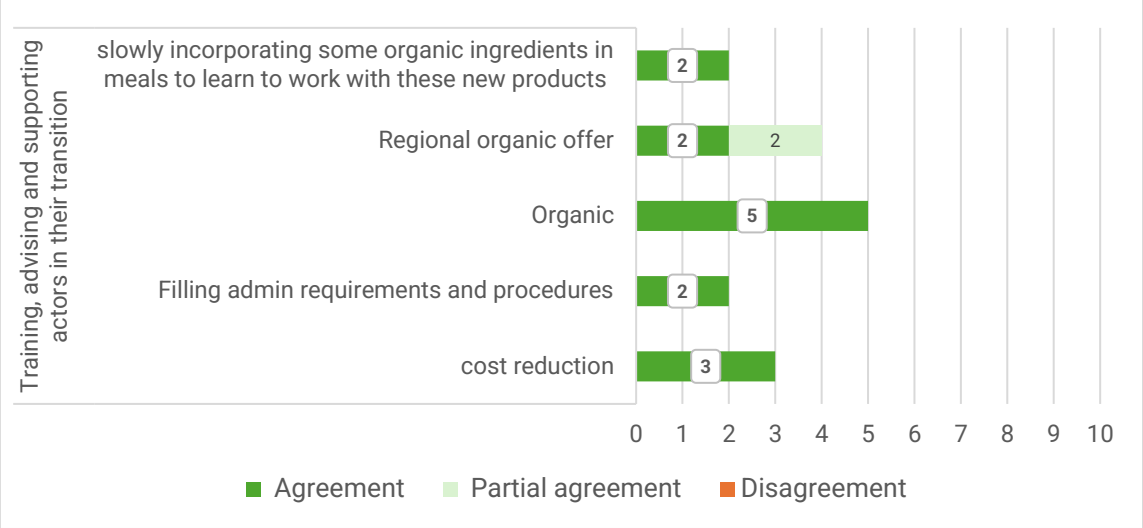

Figure 36 - Level of agreement of experts' opinions about "training, advising and supporting actors in their transition"

How to lower costs to buy more organic

Few of our experts were very familiar with the catering sector, but a few ideas were put forward to help contain costs while increasing the proportion of organic food. Three (10,3%) experts suggested to give priority to the use of organic, local and seasonal products, rather than ready-to-heat dishes. Two experts mentioned that one way is also to reduce meat purchases in order to introduce more organic plant-based proteins.
While one expert felt that canteens with on-site kitchens meant fewer intermediaries and less food waste, another expert felt that there was less waste in larger and centralised structures, of a size suited to the area, which made it possible to group purchases from local producers. Two (6,9%) experts suggested that the kitchens should be located directly on the canteen sites. Two (6,9%) experts said that in order to reduce meat costs, it was important to think about the use of the whole carcass of the animal instead of specific parts.

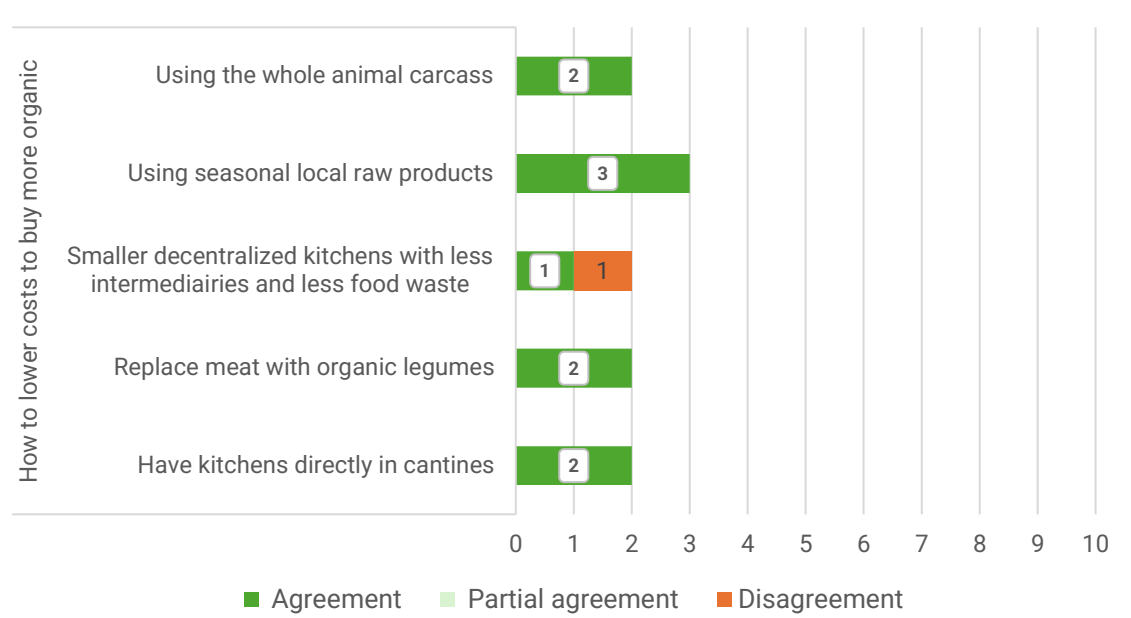

Figure 37 - Level of agreement of experts' opinions about "how to lower costs to buy more organic"

Points of consensus

The experts interviewed reached a consensus on the following points:

- The **need to increase the proportion of organic food in collective (public and private) catering**. It is essential to increase the proportion of organic food in collective catering to stimulate demand for organic products. Schools and public establishments have great educational potential.
- The **potential role of labels in highlighting the efforts of players in the sector.** Labels serves to highlight establishments that are exemplary in their use of organic products.
- Imposing **a minimum organic content would be a positive measure**, although monitoring mechanisms and transparency obligations are needed to make these measures effective.

Points of divergence and minority opinions

The panel of experts disagreed on certain points:

- Centralization of purchasing via wholesalers or direct management by establishments.
- The proliferation of labels: an opportunity for some, a source of complexity for others.
- Legislation versus financial incentives. Some experts supported legislative measures to force an increase in the proportion of organic food, while others suggest that financial incentives might be more effective. However, limited public funds make the latter option difficult to implement.

Recommendations

Several recommendations emerge from the opinions of the experts interviewed:

- **Generalise the introduction of organic quotas by public procurement in collective catering in the EU**, with more rigorous monitoring mechanisms to ensure that these quotas are respected.
- **Introduce transparency systems for the percentage of organic produce.** To get round budgetary constraints, it is suggested that transparency be imposed on the percentage of organic produce on menus, by means of a public declaration, to encourage virtuous establishments without burdening budgets.
- **Enhance and simplify the system of labels to avoid confusion and reduce the administrative burden,** while enabling establishments to stand out in the eyes of consumers.
- Support and training: **training kitchen staff and purchasers in the use and promotion of organic products** is another recommended solution. Training and advice programs for chefs and central purchasing bodies would help to integrate organic produce more effectively. Reducing meat consumption in favour of organic vegetable proteins, or favouring fresh, local and seasonal produce are ways of containing costs while increasing the proportion of organic produce in the catering sector.

3.6. Supporting organic producers

What do the experts say

26/29 experts mentioned support for producers as a lever for the development of organic farming.

Figure 38 - Level of agreement of experts' opinions about "supporting organic producers"

Contracting

20/29 (69%) experts commented on long-term **contracts**. 15/29 (51%) were **clearly in favour, and envisaged contracts for a minimum of one year and up to 5 years between producers and retailers or processors**. However, two experts showed partial agreement and felt that prices must remain fair and cannot remain fixed if production costs increase. Two other experts disagreed with these long-term contracts, believing that producers may prefer to go to the highest bidder.
4/29 (13,8%) experts commented on three-party contracts between producers, distributors (wholesalers or retailers) and processors. 3 (10,3%) were clearly in favour, but one expert pointed out that this could only work if there was sufficient volume.
Two experts felt that legislation was needed to regulate contractualization.
12/29 experts thought that contracts should make it possible to guarantee volumes, which would make it possible to stabilize purchase prices and offer greater stability and security. Contracts signed one year in advance would enable producers to plan their production. 13/29 experts thought that contracts should also guarantee a fair price for producers. One expert disagreed, arguing that guaranteeing a purchase price over the medium or long term is not possible, and saying that "*the price guarantee is wishful thinking that cannot be fulfilled*".

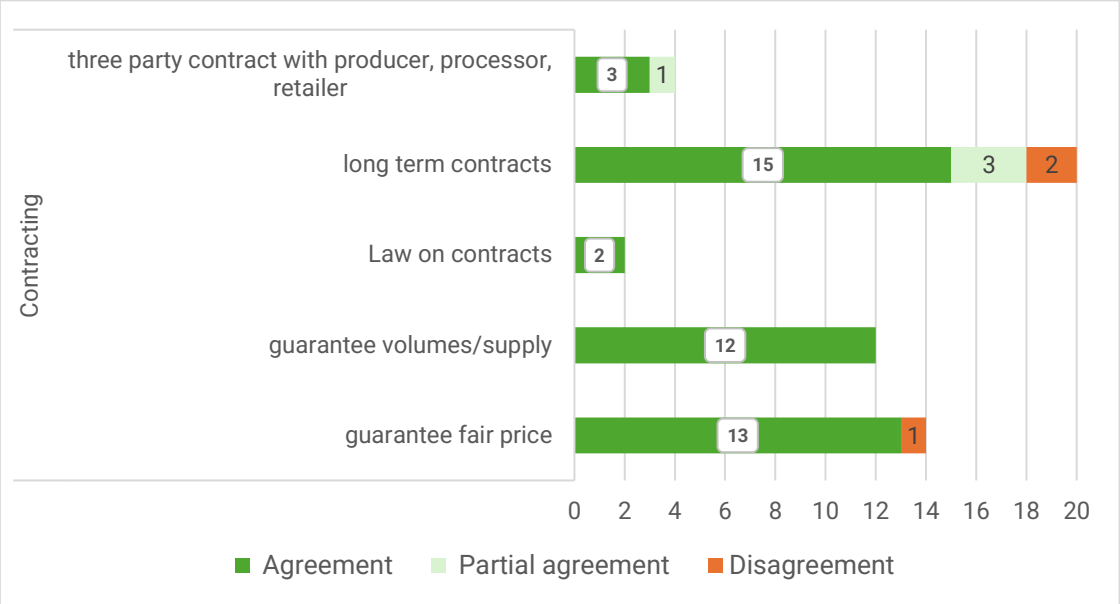

Figure 39 - Level of agreement of experts' opinions about "contractualization"

Financing by downstream players and private institutions

Pre-financing of harvests was discussed by 7/29 (24,1%) experts. They felt that pre-financing could be organized with banks and cooperatives. However, three (10,3%) experts felt that this would be too risky for most processors, even though some are already doing so. 4/29 (13,8%) experts felt that a financial contribution from processors and retailers towards the conversion of producers would be a lever to encourage conversion. Three (10,3%) experts also felt that more organic projects could be financed by private funds, and that banks could use their funds to

finance more sustainable businesses. 2/29 (6,9%) experts believe that, through their purchases, consumers also have a role to play in supporting farmers.

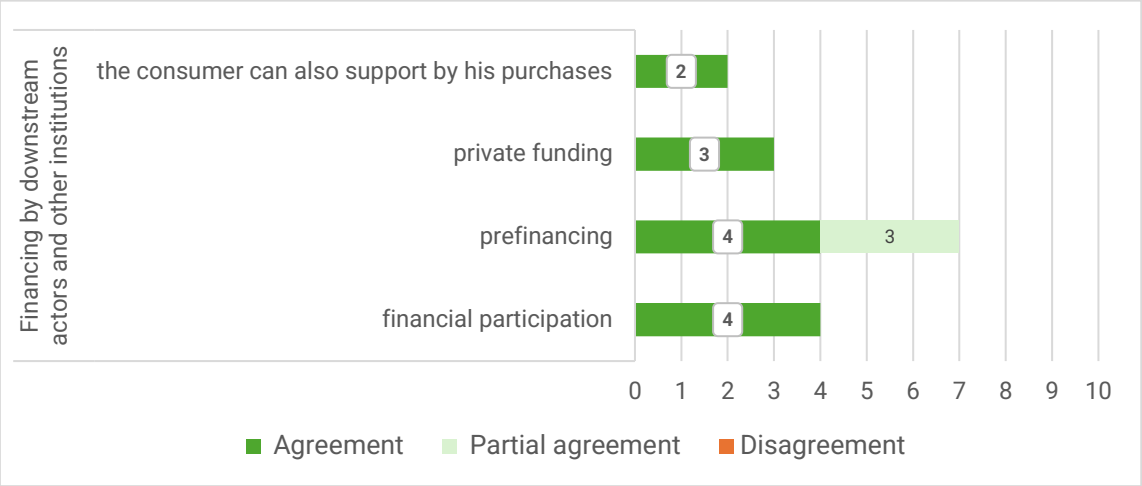

Figure 40 - Level of agreement of experts' opinions about "financing by downstream actors and other institutions"

Public fundings

7/29 (24,1%) experts thought that the CAP should provide better funding for organic farming, and that the payment times needed to be reduced. However, one expert felt that subsidies should not be relied on too heavily to develop organic farming. 3/29 (10,3%) experts also mentioned that specific support for small farms should be developed. 4/29 (13,8%) experts thought that specific aid should be introduced to prevent deconversion, in particular via the CAP. 4/29 (13,8%) experts also felt that administrative procedures needed to be simplified, both at the time of conversion and throughout the certification process. 8/29 (27,6%) experts believed that subsidies stimulate organic conversion covering the costs of organic certification and conversion. Financing of ecosystem services provided by organic farmers was also discussed.

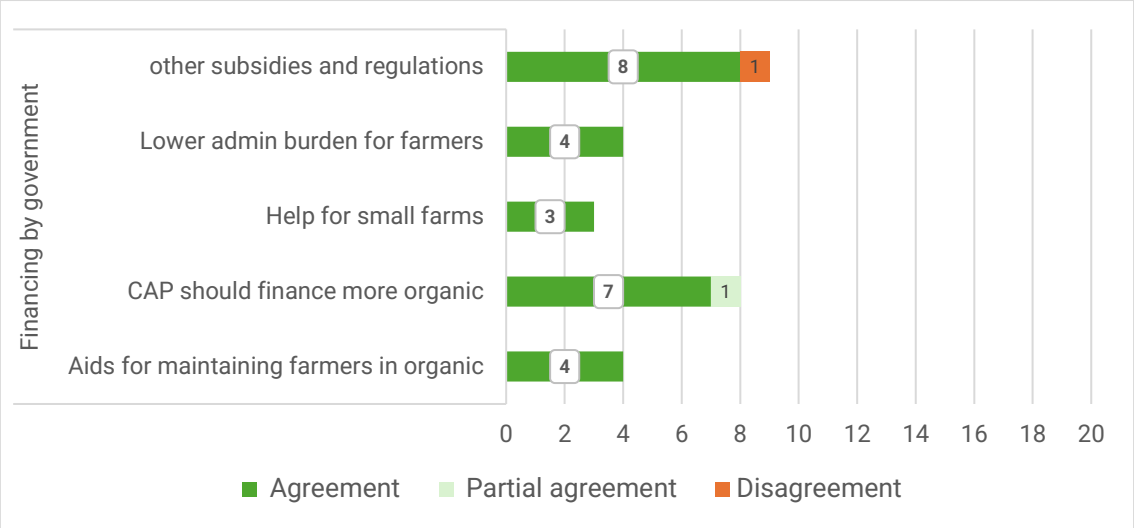

Figure 41 - Level of agreement of experts' opinions about "public fundings"

Short supply channels

6/29 (20,7%) experts thought that direct farm sales are a way of improving producers' incomes. 7/29 experts believed that it is necessary to limit the number of intermediaries and to favour short value chains. 4 (13,8%) experts also mentioned the development of local logistics platforms (micro logistics hubs) and the linking of producers and buyers would be beneficial. However, one expert believes that this would be difficult to implement.

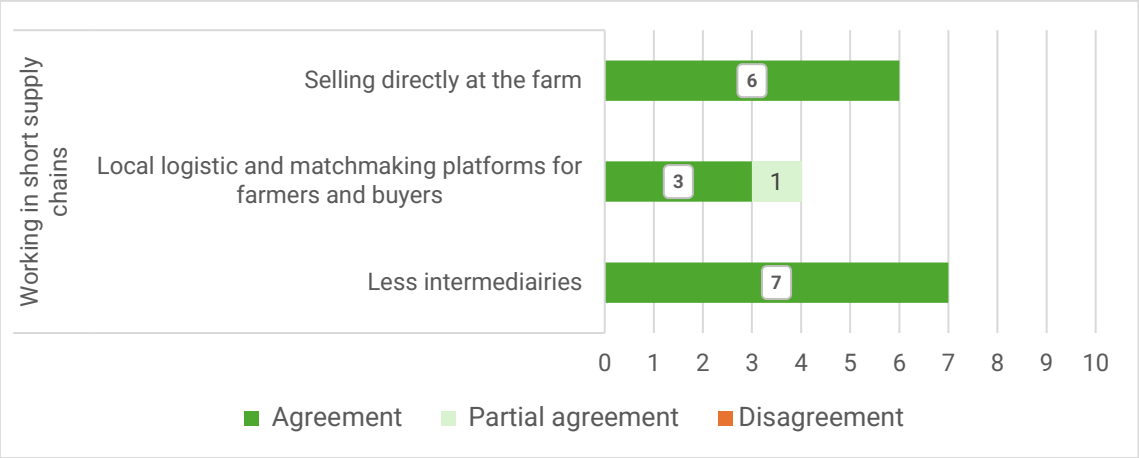

Figure 42 - Level of agreement of experts' opinions about "working in short supply chains"

Better inclusion of producers in the value chain

4/29 (13,8%) experts considered that farmer-owned cooperatives can better include producers in the value chain. 7/29 (24,1%) experts thought that farmers should be better integrated into the value chain, in particular via an integrated supply chain. However, one expert pointed out the risk that producers might lose autonomy.

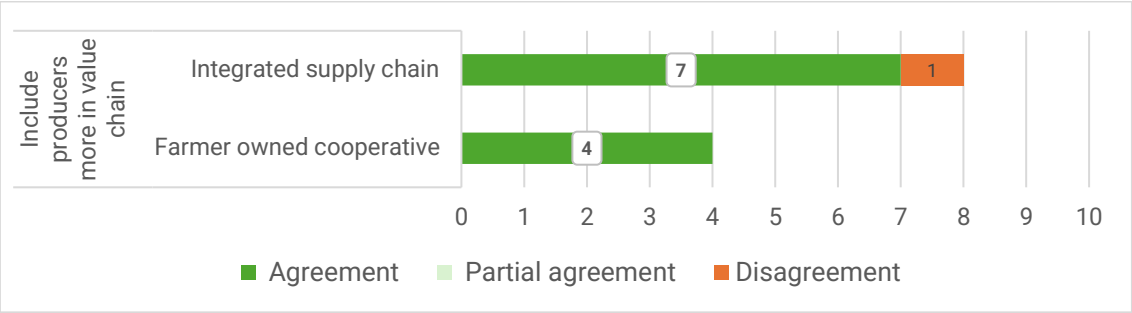

Figure 43 - Level of agreement of experts' opinions about "better inclusion of producers in the value chain"

Points of consensus

The consensus emerging from the experts' opinions concerns:

- **Long-term contracts**: long-term contracts of between 1 and 5 years between producers, retailers or processors were seen as a way of supporting producers. They could help to stabilize and guarantee prices and volumes, giving producers greater financial security.
- **The importance of public funding and subsidies**: the CAP (Common Agricultural Policy) should offer better financial support for organic farming, with shorter payment periods. Public subsidies could stimulate organic conversion, help to cover the costs of certification and pay for ecosystem services.
- **Developing short supply chains:** The importance of reducing intermediaries and favouring short value chains is seen as an effective way of boosting producers' incomes.

Points of divergence and minority opinions

Some divergent opinions expressed by the experts are:

- Prices and contractualization. Doubts were expressed about the setting of prices in the contracts, believing that they should remain fair and be able to evolve in line with production costs. Producers should remain free to sell to the highest bidder.
- Subsidies and dependence and the risks on depending on public subsidies.
- Pre-financing of harvests: it was pointed out that pre-financing by processors to support producers' harvests could involve processors taking on a dangerous financial risk.

Recommendations

Several recommendations can be made regarding support for producers:

- Frame and facilitate contractualization, ensuring fair prices for producers and guaranteed volumes.
- Improve CAP funding for organic farming: the CAP should provide better funding for organic farming and agroecological services, while reducing the time taken to pay out aid.
- Financing risk-taking: conversion and heavy investment in equipment entail risk-taking that should not be borne by farmers alone. Encouraging pre-financing of harvests by processors or retailers could ease the pressure on farmers' cash flow. Consideration needs to be given to the European policy measures to be put in place.
- Better integration into the value chain: encouraging short circuits and favouring the development of farmer-owned cooperatives to rebalance relations with buyers and return value to producers.

3.7. Import/export, local: the organic development strategy

What do the experts say

26/29 experts (89,6%) spoke about the import-export strategy and the trend towards local consumption.

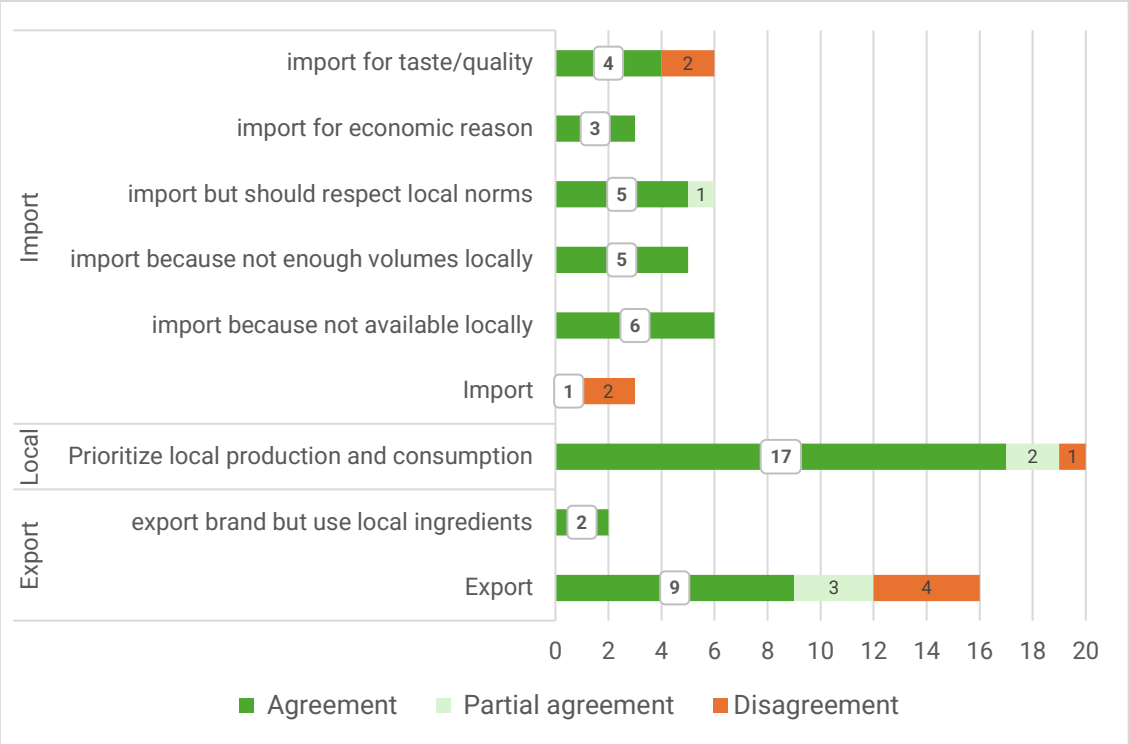

Figure 44 - Level of agreement of experts' opinions about "import-export, local: the organic development strategy"

Import

21/29 (72,4%) experts expressed their views on imports. 19/29 (62,1%) of them were in favour, especially in the case of intra-Community trade or imports of exotic products that cannot be produced in Europe. However, some of them tempered this by pointing out that local suppliers should be systematically favoured whenever possible. On the other hand, two experts felt that imports should not be part of an organic development strategy.
4/29 (13,8%) experts believed that it is sometimes preferable to import products when they are of better quality than domestic products while two experts disagreed on this statement.
6/29 (20%) experts mentioned the added value of imports when products are not available locally.
3/29 (10,3%) experts believed that imports are necessary for economic reasons.
5/29 (17,2%) experts believed that imports are also justified when local volumes are insufficient.
5/29 (17,2%) experts stressed out, however, that imported organic products should be subject to the same standards as in European countries while one expert believed that this cannot always be the case.

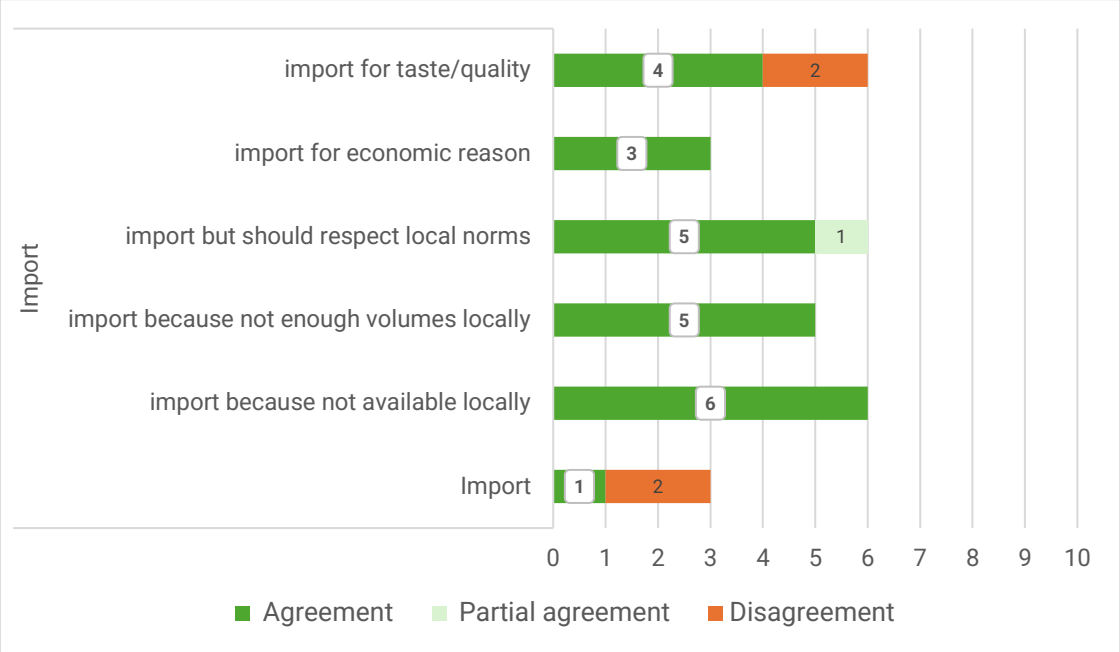

Figure 45 - Level of agreement of experts' opinions about "import" strategy

Export

16/29 (55,2%) experts commented on exports. 9/29 (31%) thought that exports can be integrated into the organic sector's development strategy. 3/29 (10,3%) partially agreed and pointed out that export can sometimes be complicated because organic consumers have a clear preference for local products. 4/29 (13,8%) experts felt that the organic development strategy could not be based on increasing exports.
2/29 (6,9%) experts mentioned the development of brands transforming local products and partially exported to countries where they do not compete with local productions.

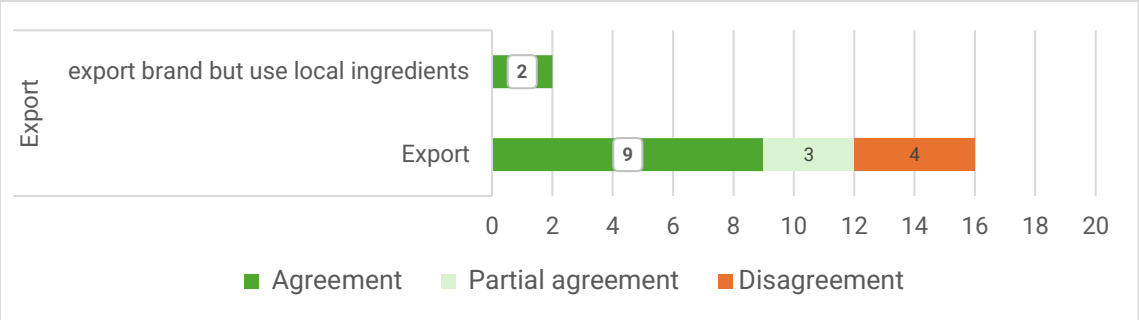

Figure 46 - Level of agreement of experts' opinions about "export" strategy

Local

20 experts commented on local production. 15 thought it was necessary to prioritise the development of local production and consumption of organic products. The impact on nutritional and organoleptic quality as well as on transport was mentioned. Two experts partially agreed and insisted on the fact that priority should be given to local rather than regional/national production. One expert disagreed arguing that prioritising local production and consumption cannot be part of an organic development strategy.

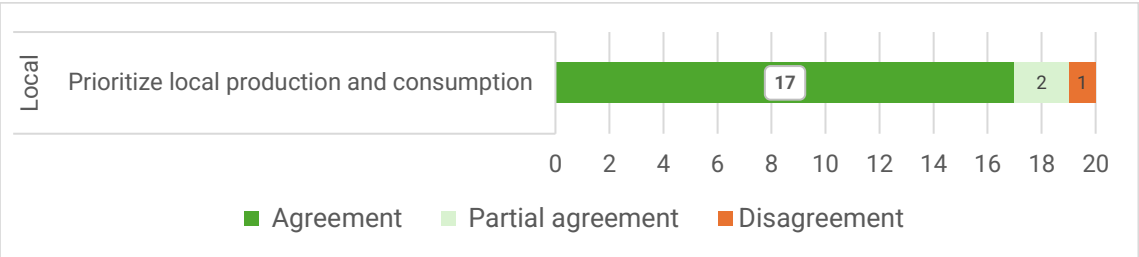

Figure 47 – Level of agreement of experts' opinions about "local" strategy

Points of consensus

The experts identified points of consensus on the import/export/local strategy:

- Prioritise local production and consumption: There was a strong consensus on the importance of **favouring short distribution channels and local production** for the development of organic farming. Most experts believed that local consumption offers advantages in terms of reducing the environmental impact of transport.
- **Use of imports under certain conditions**: Most experts considered that importing organic products can be justified in certain cases, particularly for products that cannot be grown locally or because of insufficient local volumes: organic farming is not intended to generate flows of goods across the globe and compete with local production. However, they stressed out the need to give priority to local production wherever possible, and that imported products must comply with the same production standards as European products.

Points of divergence and minority opinions

The experts expressed different opinions on the role of imports in the organic strategy: although many experts were in favour of imports under certain conditions, some still had reservations about imports being part of an organic development strategy, pointing out that this could weaken local sectors. Other experts are opposed to importing products of inferior quality or lower standards.
There are more divergent views on exports. Some experts maintain that exporting can be a lever for growth, while others think it is less suited to the organic strategy. Organic consumers often prefer local products, which limits demand for foreign organic products. Still others feel that there is a principle of responsibility to be applied, so as not to export foodstuffs that are available on the target markets.

Recommendations

Several recommendations can be made:

- **Strengthen local supply chains:** To develop organic farming, it is essential to support short distribution channels and strengthen local supply chains. This means organising local production more effectively, by supporting infrastructure and logistics platforms that facilitate links between producers and consumers. Financial incentives, partnerships with supermarkets and raising consumer awareness of the benefits of local products could help to achieve this.
- **Thinking collectively about imports:** Imports of organic products should remain a supplement, only when local volumes are insufficient or when it is impossible to produce the products locally. Imports could be strictly regulated to comply with European organic production standards. Traceability mechanisms and enhanced certification could be introduced to ensure the quality of imported products, and boost consumer confidence in these products.
- **Coordination between European countries:** The EU could encourage better coordination between Member States to promote intra-Community trade in organic products, thereby guaranteeing harmonisation of standards and facilitating the establishment of cross-border organic sectors.

3.8. Collaboration

What do the experts say

22/29 experts talked about collaboration between the players in the value chain. One of them noted that it is essential but can be difficult to put in place.

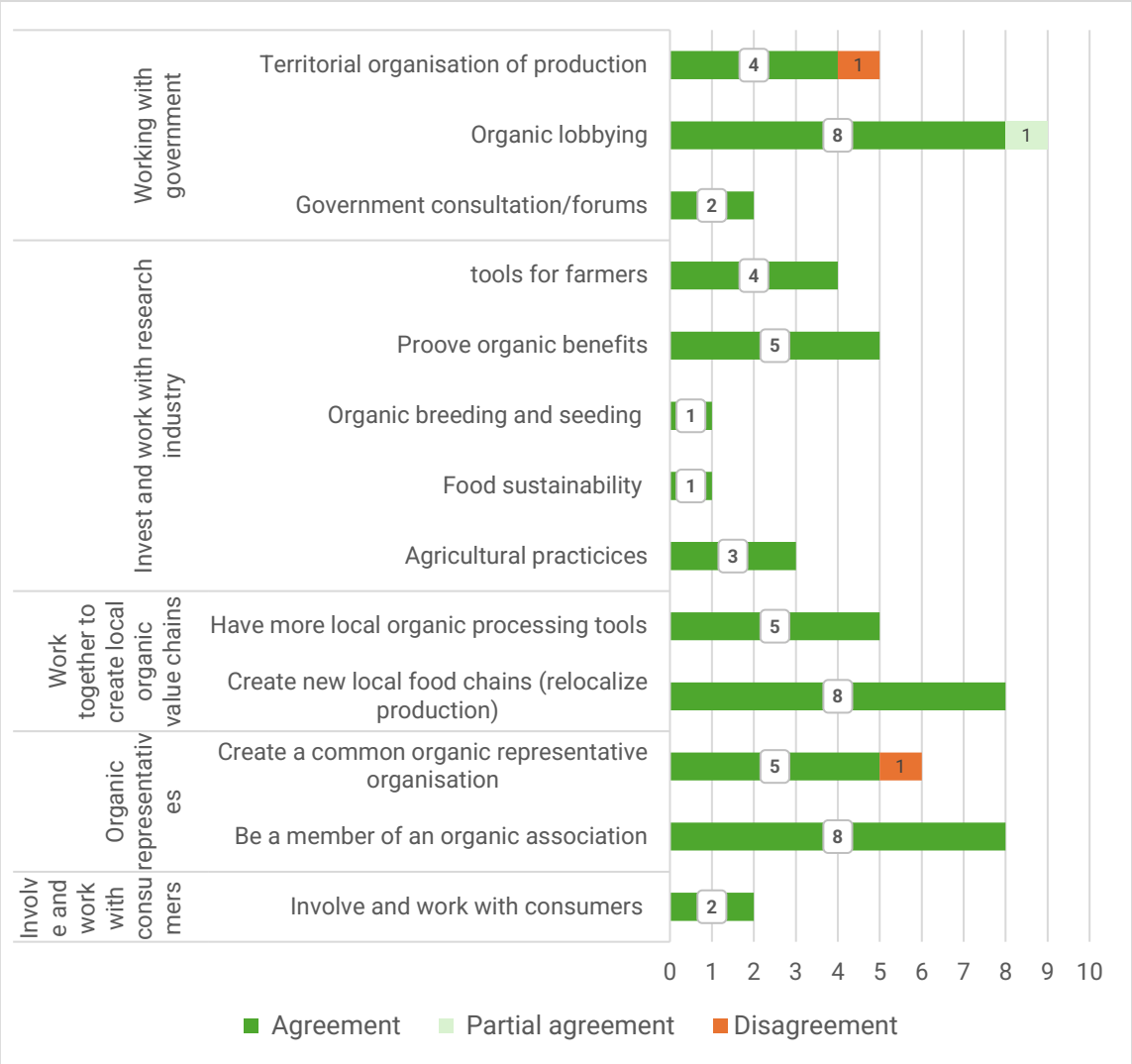

Figure 48 - Level of agreement of experts' opinions about "collaboration"

Working together to create local organic value chains

5/29 (17,2%) experts mentioned that it is necessary to develop local processing facilities, especially primary processing.
8/29 (27,6%) experts mentioned the need to develop new value chains at local level, to relocate production and processing: retailers, regional authorities, processors, interprofessional can contribute to the creation of these new local food chains in collaboration with farmers.
8 experts mentioned membership of an organic association as being important in facilitating collaboration between players. Processors and retailers should become more involved in organic bodies such as AOL, Naturland and Bioland in Germany, Synabio, Agence bio, FNAB in France, Assobio in Italy, and IFOAM Orgnanics Europe at EU level.

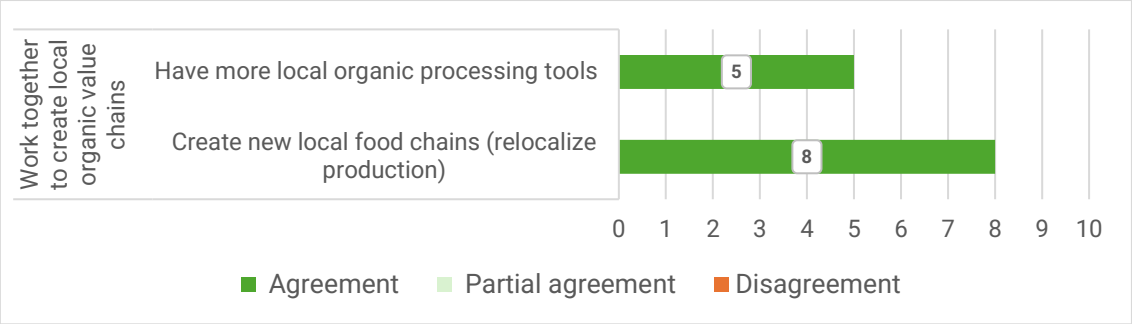

Figure 49 - Level of agreement of experts' opinions about "collaboration"

Organic representatives

5/29 (17,2%) experts believed that it is necessary to create a common representative organisation to bring all the players in the organic sector around the same table, at national or European level. They believe that this coordinating body should include market representatives (retailers, wholesalers, producers, etc.), producers, NGOs, researchers and experts. This would facilitate communication, make it possible to draw up a common strategic plan for the organic sector and to act together. On the other hand, one expert felt that there was no need for new organisations.

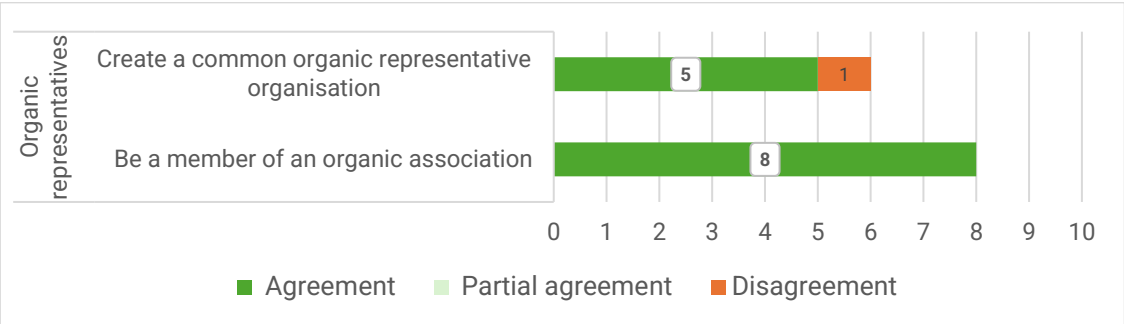

Figure 50 - Level of agreement of experts' opinions about "organic representatives"

Working with governments

9/29 (31%) experts believed that real lobbying for organic is needed. More organisations should follow inspiration from IFOAM Organics Europe in lobbying on organic issues and work together. Organic bodies need to become more professional in public affairs and lobbying, and processors and retailers have the power to influence political decisions, and working together gives organic more weight in political decisions.
2/29 (6,9%) experts also mentioned the need for governments to consult more with organic trade organisations.
4/29 (13,8%) experts believed that a better territorial organisation of production is necessary. At national level, the government and the chambers of agriculture (representatives of agriculture) should decide together what is produced, how much is produced and who is responsible for production and processing to avoid over or under production and wide variations in the price of organic products, while taking into account the needs of the market and production.

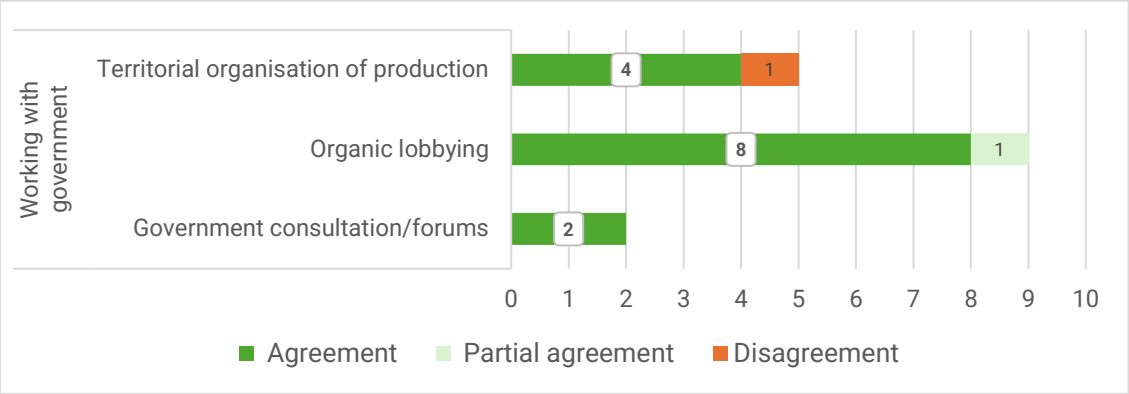

Figure 51 - Level of agreement of experts' opinions about "working with governments"

Invests and work with research industry

4/29 (13,8%) experts mentioned the importance of developing tools for farmers. It is necessary to develop technological innovations for organic farmers and to facilitate digitisation at farm level.
5/29 (17,2%) experts stressed the importance of scientifically proving the benefits of organic farming. Three experts mention the importance of developing new agricultural practices and regenerative organic farming, or increasing investment in research by processors, or creating inter-faculty modules on organic farming to carry out research in a wide variety of fields.
2/29 (6,9%) experts also stressed the need to work with consumers.

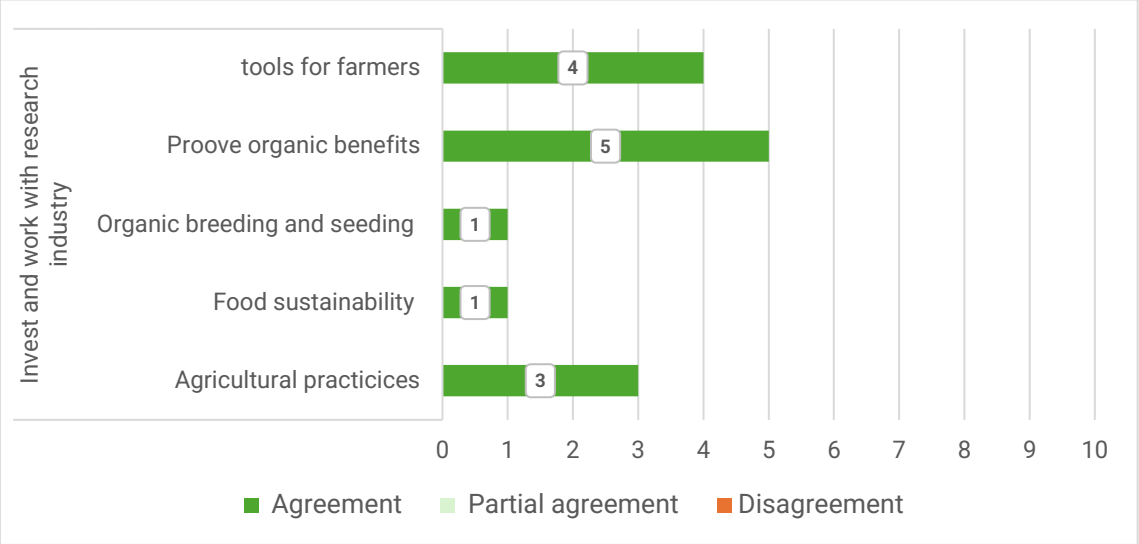

Figure 52 - Level of agreement of experts' opinions about "invests and work with research industry"

Points of consensus

Some points of consensus that emerged from the interviews with the experts on the collaboration between the players in the value chain:

- **Collaboration is essential to develop and support organic farming**: there is a strong consensus on the importance of this issue.
- The **development of local value chains is necessary to reterritorialize production and processing.** There is considerable agreement on this point.
- Greater involvement of processors and retailers in the various bodies representing the organic sector (such as AOL, Naturland, Bioland, IFOAM Organics Europe, Synabio, etc.) would strengthen this collaboration between all the players.
- Investment and collaboration with research: there is agreement on the need to develop tools and innovations for organic farmers. Some experts point out that the benefits of organic farming need to be scientifically proven, and that investment in research and new farming practices are crucial.
- Stronger lobbying and more professional lobbying bodies are needed to promote organic farming to political bodies.

Points of divergence and minority opinions

Experts' opinions differed on the creation of a common representative organisation to coordinate efforts at national and European level. The lack of agreement on this subject could be linked to variable levels of organisations at national level in different European countries.

Recommendations

Several recommendations regarding collaboration between actors in the value chain can be suggested:

- **Encourage local initiatives to develop organic value chains by involving all local actors.** The creation of regional platforms could facilitate cooperation between producers, processors, distributors and regional authorities.
- **Promote membership and engagement in organic interprofessional organizations**: the more actors in the value chain are involved in these organizations, the closer the collaboration between them will be and will lead to better representation within these bodies.
- **Coordinate efforts between all actors in organic farming,** including market representatives, producers, NGOs, and researchers.
- **Intensify lobbying and relations with political bodies**: professionalization of lobbying is necessary to strengthen interactions with political decision-makers; better coordination of lobbying campaigns would be beneficial.
- **Increase investment in research** on the benefits of organic farming, organic agricultural innovations and the digitalization of farms.

3.9. What type of scenario do the experts' proposals point towards?

The experts' opinions and recommendations were classified according to their type (incentive, voluntary or binding), and analysed towards the developed scenarios. In a first step, it was identified which of the 15 key drivers aligned with the experts' recommendation as well as the type scenario: Push (supply-driven) or Pull (demand-driven). Clearly, voluntary actions were the majority and reflected a Pull scenario for the development of organic food, i.e. driven by consumer demand. In a second step, the opinions and recommendations were further analysed against the storylines of the four scenarios to identify matching an emerging scenario (see Figure 53). **The 'Organic on Every Table' scenario was the scenario that best reflected the experts' view**.

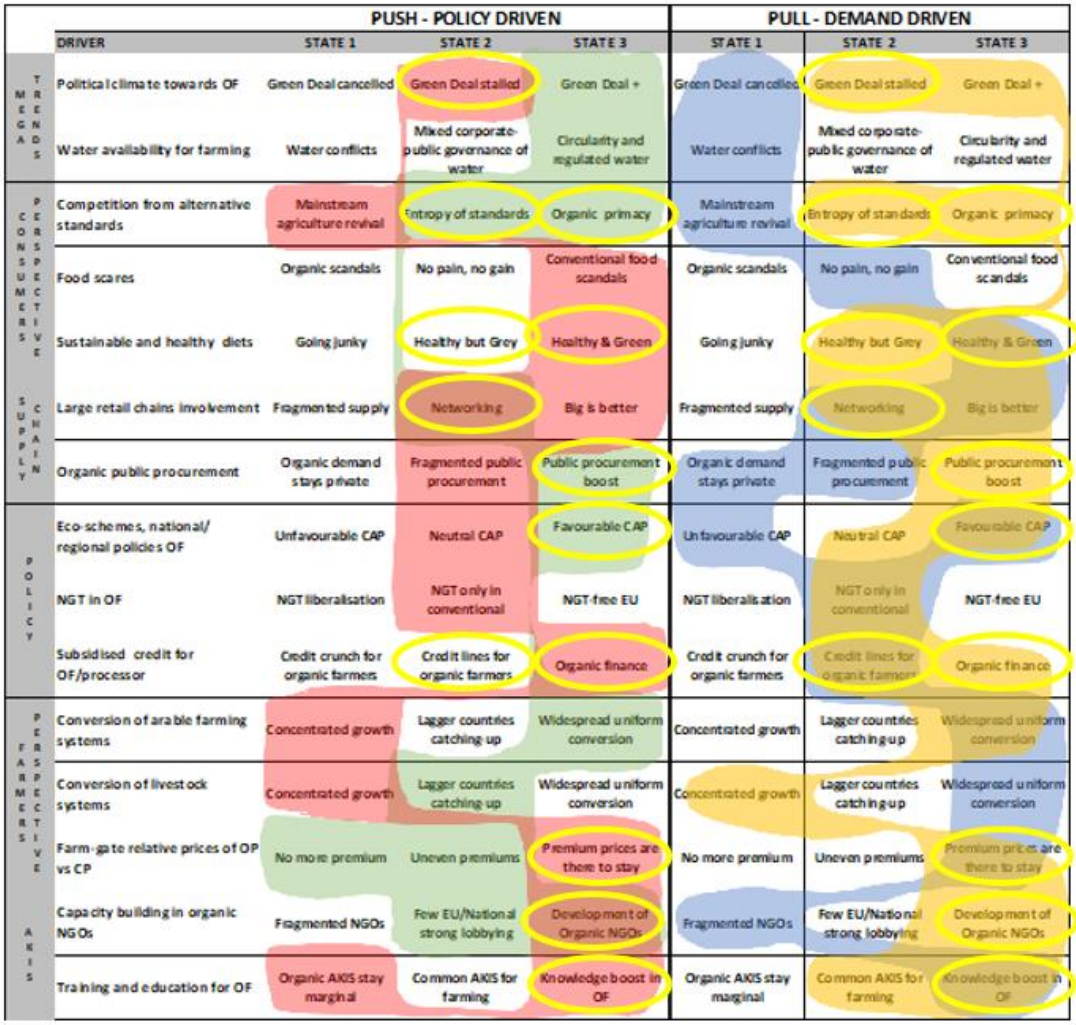

Figure 53 - Analysis of recommendations according to the 4 foresight scenarios developed by the OrganicTargets4EU project. Yellow circles shows the key drivers of each mega trend reflecting the experts' views. The yellow curve refers to the key drivers defining the 'Organic on Every Table' scenario.

Although the trend is towards Pull (demand-driven) scenario, the experts' opinions show that **the role of European or national public policy remains central in stimulating incentive or constraining measures in supporting organic agriculture**.

Although there are some divergent opinions the political measures (national or European), the consensus concerns:

- Regulations on green “labels” and ecological claims
- Transparency on the margins of the various players (a measure that could also be voluntary, as some players already do), or regulation of margins
- Differentiated VAT and internalization of the real costs of products from conventional agriculture,
- Regulations imposing a minimum percentage of organic products on collective catering, as is already the case in some EU countries, but often in an incentive-based and non-binding manner. In France, the EGALIM law imposes a minimum of 20% of organic products but does not provide for controls or sanctions. Italy has also adopted laws aimed at promoting organic products in public canteens, without setting a percentage to be achieved. Denmark has long promoted organic food but has not legislated, favouring local initiatives. Specifically, in Copenhagen, the programme launched in 2007 under the aegis of Københavns Madhus (Copenhagen Food House), public kitchens use 90% organic food. In Austria, some regions encourage the consumption of organic food in public canteens through local policies, but no fixed percentage is imposed by law.
- Relaxed European regulations for calls for tender for collective catering to facilitate and favour local supplies,
- The orientation of CAP aid in line with European objectives for the development of organic farming, to support its development via direct and targeted aid.

In view of the experts' proposals, **the key to an effective European policy would be a judicious combination of financial measures (subsidies and taxes), regulatory constraints and incentives. The right combination of policy measures is crucial, rather than a multiplication of measures.**

Part B: Organic aquaculture supply chain

4. Results

In the following paragraph are reported the converging views from European aquaculture experts on how can changes be implemented in the food supply chain to promote the development of organic aquaculture by 2030.
After interviewing some European experts on the above topic, we have compiled this document summarizing the main strategies to implement in the future years to help grow the organic aquaculture market in Europe. The experts interviewed are consultants, researchers, processors and retailers.

4.1. Raising consumer awareness of organic through better communication

It is difficult to explain to European consumers what aquaculture is in general, what are the challenges in the sector (e.g. most important cost driver in organic aquaculture is feed) and what is the aim of organic aquaculture (difficult to highlight strengths). But, since retailers are the main motor of organic aquaculture, they would have to act on better communication. Retailers and distributors are the one deciding what is on the market/about volumes and can thus support the development of the sector the most. In particular, specialised organic retailers need to more actively communicate the benefits of organic aquaculture products.
Action to contrast lack of information on consumer side is crucial. What will help even more, is for the consumer to finally understand what fish from aquaculture really is, in fact most of the consumers think that it is not good to eat! Highlight quality and sustainability of organic seafood would generate greater consumer trust.
NGOs like Naturland and others are very important for informing and educating consumers about organic products. It would be beneficial if such NGOs would support the marketing of organic products even more, thus helping organic fish farmers to have better market access.

4.2. Supporting organic producers

The EU's organic production system must undergo a better economic impact assessment. Indeed, for organic seafood producers there are few certainties in terms of planning and opportunity to achieve an economic livelihood that is closer to the EU's average. Market will not regulate itself, most important levers should come from politics and governments, but strong associations lobby are important too.
Financial support through governmental programs should be enforced, because organic certification is so far only supported along/next to other sustainable action (no differentiation between organic and other schemes not requiring as much investment).
Currently there is no or little incentive for producers to convert to organic aquaculture. Indeed, farmers must pre-finance for relatively long time (long production cycle in aquaculture until the product can be marketed). Therefore, they are only willing to do the investment if convinced that someone will buy the organic product and pay a premium price.

4.3. Selling prices and production costs

Nowadays, people are having second thoughts when buying conventional chicken, so imagine when they face the price of e.g. organic seabream or seabass.
The problem arises from the production side, because production is so small, then it is logical that the prices are high. Indeed, the costs for certification and organic feed are very high. Only if the production and the economies of scale will be improved, the prices will drop so as to see this price difference transferred to the shelf for the consumer and, in turn, an increase of the consumer demand.

4.4. Technical innovations and diversification

At the moment there are few organic seafood producers and there is lack of organic sea products. However, as technology is improving in fish production and processing, there are opportunity for new species/products/packaging (e.g. fillet, smocked, with a sauce, etc.).
Allowing organic aquaculture/fisheries in offshore wind parks could help to quickly increase the share of (organic) aquaculture in the EU. Recirculating Aquaculture Systems (RAS), which are currently excluded from the scope of EU organic regulation, would help production grow. Although, allowing RAS could prove to be a double-edged sword due to increasing consumer concerns (especially younger generations) regarding sustainability.
Also, there is a big potential of Integrated Multi-Trophic Aquaculture (IMTA) as a sustainable system to produce organic aquaculture. However, currently, there are practically no seafood products commercially available originating IMTA. More research and proof of concept, that IMTA can be economically successful, is needed.

4.5.Technical/regulatory barriers

The industry needs to watch its environmental footprint, develop models that reduce and replace animal proteins with alternative sources, or it will be wiped out. We need protein from substitute sources, such as insects or plant-based proteins that are very compatible with the natural diet of several fish species. But we need much more clear and smarter regulations and frameworks. EU organic regulation is too complex and bureaucratic. Optimal solution would be to change regulation framework (smart regulatory framework) and support organic aquaculture making organic aquaculture less expensive (e.g. smart taxes).

4.6. Boosting organic food in out-of-home catering

Out-of-home catering accounts for a significant proportion of household food consumption, therefore, including more organic products in these sectors would be a major lever for organic development. Communication/campaigns about out of home catering based on organic seafood would be a great lever too.
Enhance the budget for public procurement in a way that allows for better access to organic seafood by citizens would shows true political interest in leading the development towards an organic food system.

4.7. Conclusions

In the current competitive and global economic context, the role of European and national public policy remains central in stimulating and supporting organic aquaculture.

The key to an effective European and national support policy would be a combination of measures to overcome both regulatory and technical barriers to the development of organic aquaculture.

All the stakeholders (farmers, citizen associations, environment associations) realize that it is impossible to develop organic aquaculture without overcoming these barriers. A clear political willing to support innovative governance mechanisms aiming at a greater sustainability and equity in the value chain is needed. This also mean to overcome regulatory barriers to achieve a smart regulatory framework for the organic aquaculture

Financial support provided by the European Maritime, Fisheries and Aquaculture Fund (EMFAF), through national programmes should be enforced, because organic certification is so far supported along/next to other sustainable action (no differentiation between organic and other schemes not requiring as many investments).

Actions to contrast lack of information and raising consumer awareness of organic through better communication is crucial. As well as, to enhance the budget for public procurement in a way that allows for better access to organic seafood by citizens. This would show true political interest in leading the development towards an organic food system.

However, not only economic but technical barriers should be overcome, such as: a) the lack of organic juveniles, b) the lack of feed ingredients (e.g. vitamins, additives, alternative proteins, etc.), c) the restrictive interpretation of the EU legislation on the organic shellfish water quality, d) the mechanisms to support organic products through the whole value chain.

5. Discussion and Conclusion

The achievement of the 25% of organic land in Europe has the potential to bring some significant changes in the agri-food value chain. Indeed, organic is not only an alternative model of farming but also a market with its specificities and its requirements, a whole alternative agri-food value chain exits in parallel, sometimes working closely with conventional agri-food value chains. To have a detailed and comprehensive analysis of the impact of reaching 25% of organic land in the EU on the agri-food value chain, there should be first an analysis of the structure of the organic lands per country, type of crops, actors and etc. Within the OrganicTargets4EU project, the socio-economic impacts of achieving the 25% organic target will be analysed at the EU level by adapting the existing CAPRI model [7]and at the country level through an in-depth modelling exercise for selected case studies. However, for the purpose of this discussion, it is assumed that the distribution of organically managed land aligns with the current typology in the EU.

Achieving the 25% will have significant impact on the specialised organic actors in the middle and end of the chain, such as processors and distributors, by increasing the number of suppliers. This will ensure a more stable and diversified supply of organic products.

Combined with adequate market measures to raise awareness of consumers, this development of the upstream of the organic agri-food chain can lead to a better professionalization of specialized organic actors, potential economies of scale and a wider offer of organic products in specialized shops.

On the other hand, with 25% of European land managed organically, big actors of the agri-food market will also likely engage more and strengthen their organic strategies. Indeed, if organic products become more widespread and desirable because effective market measures, conventional actors will be likely to expand their range and participate to the development of the European organic market.

Finally, reaching 25% of organic lands in Europe will lead to a shift in the structure of agricultural production. This will create new dynamics in the different organisations to structure the production of agricultural products, such as producers' organisations and interbranch organisations. While the role of organic actors in these structures is currently often marginal, a development of the EU organic land would change the power dynamics and give organic actors a more prominent position. Depending on the national context, this can be achieved through a bigger role of organic actors within existing structures or through the establishment of structures specialized for organic producers. A stronger role for organic in these structures goes beyond the symbolic recognition of organic farming but it has very concrete implications. Producers' organisations and interbranch organisations can be responsible of the marketing of agricultural products and they can receive national and/or European funds to help producers with investments or help them cope with crisis situations. Therefore, if organic actors get a stronger role, they will likely access new resources to support their needs.

[7] CAPRI Modelling System: Common Agricultural Policy Regionalised Impact Modelling System

The findings of the OrganicTargets4EU project highlight critical actions for fostering the growth of organic agriculture in the EU, which align with the objectives of the Farm-to-Fork strategy. Based on the consensus and divergences among experts, several core areas of focus emerged to support the development of organic farming, emphasizing the roles of communication, affordability, innovation, visibility, support for producers, local and international supply strategies, and collaboration within the sector. **The conclusions below reflect as closely as possible to the experts' views and opinions expressed during the Delphi study**.

Consumer Awareness through Effective Communication

Experts consistently emphasized that clear, educational, and transparent communication is essential to increase consumer awareness and demand for organic products. Such communication should underscore the environmental and health benefits, taste, and quality associated with organic food to address the recent decline in consumer interest. Coordinated campaigns led by governments, retailers, NGOs, processors, and media could establish a unified message, ensuring that organic products' advantages are well understood. In addition, communication should also come back on the basics of organic farming and organic practices as this might not be widely known. The importance of transparency and information, particularly regarding product origin, farming practices, and environmental impact was also highlighted, with calls for clearer labelling to counter consumer confusion stemming from competing green claims and alternative environmental labels.

Processing and distribution companies also need to adapt their marketing strategies to meet new consumer expectations. Knowing consumers' consumption and purchasing patterns, as well as their communication channels is crucial to convincing new consumers and retaining existing customers. A lack of funding for communication around organic products was also highlighted by the experts. It was suggested that governments and retailers should invest more to ensure that campaigns are more widespread and have a greater impact. Given that similar promotional campaigns are already carried out for certain products by governments and retailers, it would be reasonable to request the same level of support for organic products to help them gain broader recognition and consumer trust.

However, while consumer information and labelling are important to allow for informed consumer choices and to incentivise producers to improve their products, evidence shows that such measures are insufficient on their own. Indeed, retailers also influence and can shape consumers' food choices through various factors, such as price signals, the shopping environment, and marketing strategies, with examples from different countries illustrating these effects (EUROGROUP FOR ANIMALS 2023).

Affordability and Accessibility of Organic Products

The affordability of organic food is a significant concern. Indeed, in the recent Eurobarometer "Europeans, Agriculture and the CAP" 9 in 10 respondents agreed that organic products are more expensive than other food products (Eurobarometer, 2025). While some experts advocate for more effective communication to help consumers understand and accept organic price differentials, others suggest policy interventions such as VAT reductions or incentives for organic producers to narrow the cost gap with conventional products. Retail margins and promotional strategies also play a role in affordability, though opinions are mixed on the need for regulation.

A balanced approach to affordability, addressing retailer and processor margins alongside supportive public policies, could improve accessibility without undermining the value chain. However, any intervention should be carefully calibrated to avoid undesirable side-effects, such as the disaffection of players in the value chain for the organic market.

Innovation Aligned with Consumer Expectations

Innovation in the organic sector must be carried out with a keen ear and understanding of consumer expectations, while remaining true to the fundamental values of organic farming. A well-balanced strategy combining product innovation, consumer education and sustainability[8] can help to boost demand while avoiding making organic products inaccessible to the general public. Experts saw innovation as essential for expanding organic consumption, with a focus on creating organic versions of popular products and plant-based protein alternatives that meet modern dietary needs. A targeted approach to product innovation grounded in consumer preferences for taste, quality, and convenience could attract new customers while reinforcing organic values of sustainability. However, experts caution that innovation should not lead to increased prices to ensure organic products accessibility to the average consumer. According to the experts, consumer's attraction to local products is also an opportunity to re-territorialize processing facilities, by developing facilities capable of handling small volumes or shared facilities.

Enhanced Visibility in Retail and Catering

Increasing the visibility of organic products in stores and the catering sector was seen as a strategic priority. Retailers play a crucial role, with suggestions for dedicated shelf space, developing e-commerce, click and collect, and clear in-store promotion to make organic products more visible and accessible. Most experts see increasing the proportion of organic products in collective catering as a strategic lever for developing the organic market and raising public awareness. Expanding organic options in public catering, particularly in schools and hospitals, offers an effective way to integrate organic food into daily life, normalizing organic consumption across various demographics. A strengthened regulatory framework for public procurement and support for organic in catering could drive demand while raising awareness. One of the main challenges remains cost control, a key element in ensuring that mass catering can increase its use of organic products without jeopardising public or private budgets.

Staff training is also considered important, particularly in central purchasing departments and at points of sale, although as This could contribute to a better shopping experience and improve the quality of in-store service.

Support and Stability for Organic Producers

Sustained support for organic producers emerged as a critical component for the long-term growth of organic farming. Suggestions included long-term contracts, cooperative structures, and fair price mechanisms to ensure a stable market and fair compensation for producers. Strengthening the Common Agricultural Policy (CAP) and Common Fisheries Policy (CFP) to

[8] According to the Food and Agriculture Organization (FAO), sustainability must meet the needs of present and future generations, while ensuring profitability, environmental health, and social and economic equity.

prioritize organic practices, along with fostering local supply networks, could increase producers' integration into the value chain, supporting both production and market resilience.

Balanced Approach to Import and Local Production
Experts recommended a balanced strategy in the organic sector, promoting local supply chains while selectively importing products that align with EU standards. Experts pointed out that exports could be an economic lever, but they need to respect the principles of sustainability. Strict regulation strengthened logistical infrastructures adapted to local conditions, and better integration of local producers in the value chain are key to the successful development of organic farming.

Collaboration and Advocacy for Sector Growth
Strengthening collaboration between all the players in the value chain and developing local value chains is essential for strategic growth. Experts noted that forming associations of organic processors, retailers, and producers can improve coordination and sector strategy. Effective lobbying is crucial, and coordinated efforts can better influence policies that support organic agriculture. Investment in research and innovation is also needed to drive sustainable practices that align with organic values.

In conclusion, this study underscores the need for a cohesive, multi-stakeholder approach to drive the growth of organic agriculture. These recommendations, based on expert consensus, can help to develop coherent strategies to promote organic farming and achieve the Farm to Fork objectives.

Summary of the consensus most perceived amongst interviewees
Raising consumer awareness via coordinated communication: 90% talked about this topic and 92% agreed on this topic to be developed. • 65% considered that the practical action to be taken should be based on governmental action (policy driven action): 100% consensus among those who talked of this action • 34% considered that the communication should rely on benefits of OF: 82% consensus • A third considered that health benefits and environmental sustainability of OF should be emphasized (biodiversity, pesticide level and animal welfare were also cited): 100% consensus • 41% considered that clarification and simplification of labelling should be done: 86% consensus • 45% considered that transparency on geographical origin of product could help to develop OF: 100% consensus
Working on affordability i.e. price: 72% talked about this topic and 86% agreed on this topic to be developed. • 52 % considered that retailer should lower their margin: 100 % consensus • Almost half (45%) talk about regulating margins, but they mostly disagree with this idea: 61 % disagreement • Hard discount availability for organic product is discussed for 38 % of interviewee, most of them consider it helpful for OF development: 82% consensus • Almost half (45%) think that the government could make VAT free or low for organic, but they cannot find a consensus: 54 % agreement

• 38 % think spontaneously to increase process and organisation efficiency and productivity: 82% agreement • 45 % talk about the needs of more or bigger volume in OF: 61 % agreement
Innovation on organic products: 52% talked about this topic and 93% agreed on this topic to be developed. • About the action to put in place, around a half (48%) think of innovation for organic processed food but they believe for half of them it wont help: 54 % disagreement
Giving more visibility to organic products: 52% talked about this topic and 100% agreed on this topic • 52% suggest that retailers play a major role, especially to increase or maintain organic assortments: 80% agreement • 41% think otherwise that regulation could decide a threshold for the minimum % of organic product assortment (regulation constraint), but two thirds disagree with this idea: 66% disagreement • for out of home catering, this regulation way is approached by 69% of interviewee: 75% agreement
Supporting organic producers: 90% talked about this topic and 100% agreed that organic producers need support • long term contracts have spontaneously been identified as a lever for 69% and three quarter of them agree that it could help: 75% agree • Volume and price guarantee is another measure cited by 41% that can be put in place: 100% agreed that it can help • Fair price is also cited by 48% and they mostly agree that it could be a positive measure: 93% agreement • as a weak signal, CAP Policy for financing more organic is also approach by few people (27%) but they almost all agree that CAP should better finance organic practices: 87% agreement
Import, export or local - the organic development strategy • 72% talk about importation and they believe it could help: 90% agreement • paradoxaly, 69% talk about prioritizing local production and consumption => 75% agreement
Collaboration is a topic approach by 76% of interviewees and 95% of them consider that collaboration among organic stakeholders should be improved but actions to be taken are not so clear, • 31% suggest that organic lobbying is worthable: 89 % agreed • 27% talk about creating new local food chains (relocalise production) • 27% think to be part of an organic association

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6. Annex

6.1. Annex 1: Questionnaire for the first round of interviews (example of the questionnaire intended for mixed retailers)

Interview questionnaire round 1 (Mixed retailer)

1. **Introduction** **(2 mins)**

As a reminder, the interview will be recorded so that it can be analysed later.
First of all, thank you for taking the time to do this interview with us today.
With 17 European partners, we were mandated by Europe to carry out a study as part of the OrganicTargets4EU project aiming at contributing to the achievement of the Farm-to-Fork target of 25% of agricultural land under organic farming and a significant increase in organic aquaculture by 2030.

Our interview will focus on the following issue: "How can changes be made at the downstream level of food chains to promote the development of Organic Agriculture by 2030? Census of brakes and levers in Europe."

Is this problem clear to you?

2. **Introductory questions** **(5 mins):**

1) Expertise/Position of the interviewee
2) Company presentation
3) % of organic in turnover or sales volume

3. **Undirected interview**

We will begin with a first phase of an undirected interview, we will give you instructions, displayed on the screen, and will let you express yourself freely on the subject for around ten minutes.

3.1 **Project instructions** (1 min)

By focusing on downstream food chains, the study in which you are participating today aims to understand how changes can take place in European food supply chains to promote the development of organic agriculture. by 2030. In your opinion, what actions could your organization, as well as all the links in the sector, undertake to develop the organic sector? The idea here is to identify the levers to prioritize to develop the organic sector but also to identify the obstacles to the implementation of these changes.

3.2 **Free expression** (10-20 min)

4.**Directed interview** (40min) :

We will now move on to the guided phase of the interview.

General

1.**For you, where should/can the impetus for the development of organic come from? Politicians, consumers, producers, retailers, processors... What types of actors does this concern (small, large, local, European, international...)? How is this modelled?**

2.What are the levers (national/regional/interregional) to mobilize to support the development of organic in distribution circuits? For which markets? (Local, European, international)

3.What would be the socio-economic impacts of an increase in the organic market (demand + supply) for your company and your sector?

4.What changes should be made to your supply chain to increase the organic offering? What costs would these changes generate, particularly compared to conventional?

Policy

5.**What political or regulatory decisions could help or hinder the development of your organic business? At what scale (European, national, local)?**
6.How would your business be impacted if there were demanding policies to push organic?

Sales-Markets

7.**How would your strategies to stand out from your competitors change if the organic sector grew? Specifically for organic products (either organic or conventional)?**

Consumer demand

8.**What measures could influence the sales prices of organic products compared to conventional products? (Internal, political or other)**
9.By what means, other than price, can you influence consumer demand for organic products?

Purchasing-supply

10.How could your purchasing policy (specifications, contractualization) change to further favour producers and organic products? What costs would this generate, particularly compared to conventional?

11.If organic developed further, would you have the capacity to process larger volumes (infrastructure, workforce, etc.)? Otherwise, what should be changed? If yes, how? What costs would this generate, particularly compared to conventional?
12.What type of collaboration with stakeholders in the value chain is necessary to enable the development of organic in your sector (information sharing, synchronization of decisions, i.e. making decisions together, or distribution of value with partners or others)? What changes are necessary to implement it? Brakes and levers.

13.How can we promote a better distribution of value between the links in the chain in a perspective where the organic market is growing?

Collective catering

14.How would public supply (collective catering) oriented more towards organic affect your strategy and your structure? (e.g. consumers eat more organic at work or at school so they want to eat organic at home)

Import/Export

15.What impact could the development of local organic production have on your sales strategy? What costs would this generate, particularly compared to non-local organic?

16.What is the strategy for organic imports in the years to come?

5.Ending Questions:

To conclude, do you have any comments or clarifications to make on other changes that your organization could implement to develop the organic sector?

6.Conclusion (1 min)

For the second round of this study, we will send you a 2-page summary in May with the results of the first round, and ask you to react to these results and this analysis, would you prefer that we send you an online questionnaire to complete or are we planning a second interview?

Thank you for taking the time to do this interview with us.

6.2. Annex 2: Questionnaire for the first round of interviews for aquaculture

Questionnaire round 1 (Distributor - mixed)

1. **Intro (1 min)**

Just to remind you, the interview will be recorded so we can analyse it later on. Do you still consent?
Thank you for taking the time to do this interview with us today.
Along with 17 European partners, we have been commissioned by Europe to carry out a study as part of the Organic Targets for EU project, aimed at promoting the development of organic farming in Europe.
Our interview will treat the following topic: "How can changes be implemented downstream in the seafood supply chain to promote the development of organic aquaculture by 2030? Identification of the obstacles and levers at European level."
Is everything clear so far?

2. **Introduction questions (3mins):**

1- Company description
2- % organic in sales
3- Expertise/position of interviewee

3. **Non-directive interview**

We'll start with an initial, unguided interview phase. We'll give you a set of instructions, displayed on the screen, and let you express yourself freely on the subject.

3.1 Non-directive interview instructions (1 mins)

By focusing on the downstream end of the supply chain, the study you are taking part in today aims to understand how changes can be made in European seafood supply chains to promote the development of organic aquaculture by 2030. In your opinion, what actions do you think your organization, and all the links in the chain, could take to develop the organic sector? The idea here is to identify the levers to prioritize in the development of the organic sector, but also to identify the obstacles to implementing these changes.

3.2 Free expression (10-20mins)

4. **Directive interview (40mins):**

We'll now move on to the directive phase of the interview.

General

1- **Where do you think the impulse for organic development should/could come from (Politicians, consumers, producers, distributors, processors...)? What type of actors would that concern (small, big, local, European, international...)? How does that look like?**

2- What levers can be mobilized to support the development of organic seafood in distribution channels? For which markets (local, European, international)?

Political

3- What political or regulatory decisions could help or hinder the development of your organic branch? On what scale (European, national, local)?

Sales-Market

4- How would your strategies for differentiating yourself from your competitors change if the organic sector developed? Specifically, with your organic products against organic competitors or with conventional products?

Consumer demand

5- What measures could influence the buying and selling prices of organic seafood products compared with conventional seafood products? (Internal, political or other)
6- By what means, other than price, can you influence consumer demand for organic seafood?

Purchases-supply

7- How could your purchasing policy (purchasing criteria, contractualization) change to favour organic producers and products? What costs would this entail?
8- If organic aquaculture were to develop further, would you have the capacity to handle larger volumes (infrastructure, manpower...)? If not, what would need to change? If so, how? What costs would this entail?
9- What type of collaboration with other players in the value chain is needed to enable the development of organic seafood production in your sector (information sharing, synchronization of decisions, or sharing value with partners or others)? What changes are needed to implement it? Barriers and levers.
10- How can we promote a better distribution of value between the actors in the chain, in a context where the organic market is growing?

Collective catering

11- How would a public procurement policy (collective catering) oriented more towards organic affect your market? How? (ex: consumers eat more organic at work or school so they want more organic at home)

Import/Export (local = national and regional, outside = EU + other third countries)

12- What impact could the development of local organic seafood production have on your strategy? What costs would this entail, especially compared with non-local organic production?
13- What is your organic import strategy for the coming years?

5. <u>Final questions (2mins):</u>

- In conclusion, do you have any comments or clarifications on other changes your organization could implement to develop the organic sector?
- In your opinion, what % will organic seafood represent in consumers' plates by 2030?
- How will this be reflected in your organization (sales, workforce, % organic, etc.)?

6. Conclusion (1 mins)

For the second round of this study, we'll be sending you a 2-page summary in May with the results of the first round, and asking you to react to these results and analysis.

Would you prefer us to send you an online questionnaire to fill in, or schedule a second interview?

Thank you for taking the time to do this interview with us.

6.3.Annex 3: Experts' verbatims after the first interview

Topic 1: Raise consumer awareness of organic

Communication around organic was cited as a major lever by all the experts interviewed to revive market growth. Indeed, the following terms were mentioned several times by the experts: "Raise awareness", "Pedagogy", "Communication", "Explain", "Understand".

- **A common front**

It would seem that all players in the food system must get involved in this area. Indeed, "retailers *must speak out about organic*" (French mixed distributor, 2024). 7 experts agreed that "*greater public awareness was necessary, which requires the involvement of politician*" (German mixed processor, 2024) and that they "need *state help to communicate about organic*" (French mixed processor, 2024). 2 French experts also spoke about two **specialized organic agencies**: "*the Bio Agency has an important role in the promotion of organic agriculture*" (French organic processor, 2024) and "*the Synabio already carries out educational work with the consumer* » (French mixed processor, 2024). According to a French mixed distributor, processors are also important*: "**Manufacturers** must communicate on the subject [organic]"*. However, a French organic processor explained that "*we can make people understand the value of organic through advertising but when it comes from the processor it is less credible, the message gets across better through NGOs"***.** The role of NGOs was also confirmed by another German organic processor: *"We need more actions from NGOs in sharing information about organic.*" In addition, 3 French experts explained that "Medias *have their role to play. They have a very strong influence, both negative and positive*" (consultant, 2024), and that it was necessary "to *be positive about organic in the media*" (mixed processor, 2024). A French mixed processor also spoke about the role that mutual societies can play in promoting organic food: "Perhaps *communicate more on the theme of health? I am thinking of the approach of the **mutual societies** which recently made a platform to push the consumption of organic products, it was really strong*".

- **The benefits of organic**

The previously mentioned actors must "*communicate on the **benefits of organic"*** (Italian organic processor, 2024) and make "*an educational effort to show the societal and individual benefits of organic"* (French mixed distributor, 2024). The environment was cited by 7 experts as a benefit to communicate about: "*We must make the link between organic farming and the climate, biodiversity and sustainability*" (German organic association, 2024), *"we need greater consumer **environmental awareness** to increase demand for organic products*" (Austrian organic processor, 2024). The subject of health and nutrition was mentioned by 12 experts: "*it is a strong argument to talk about the **nutritional benefits** of organic because it is very trendy"* (French mixed distributor, 2024) and "***health** aspect is more attractive than organic, so we have to promote that to praise the benefits of organic*" (French consultant, 2024). In addition, *"we must communicate these advantages because there is necessarily a comparison. No **pesticides**, no **GMOs, animal welfare"*** (French organic interprofessional, 2024). 4 experts also want "*awareness must be raised about the harmful effects of other practices*" (Italian organic processor, 2024).

- **The budget**

In order to promote the benefits of organic products, 7 experts talk about the need for "increase *the **communication budget***" (French consultant, 2024). For this same consultant, *"mid-sized organic processors have been less impacted by the organic crisis thanks in particular to the fact that they are active in marketing and promotion of organic*." A Danish distributor mentioned that they had "*a big marketing budget and yet only 10% is invested in organic products while they represent 16% of our sales, we should not underinvest in organic"*. A French organic inter-profession explained its situation: "*The other SIQO [Official sign of quality and origin] (IGP, AOP) **make compulsory contributions** to their inter-profession, but not organic: we therefore do not have the same means to communicate than other SIQO inter-professional organizations. For example, Bordeaux wines have 28 million€/year for communication. We, with the help of the region, reach 450,000-500,000€/year*".

- **Communication**

This budget would make it possible to create "information ***campaigns"*** (Greek mixed distributor, 2024) to highlight the benefits of organic mentioned above. Specifically, "giant ***European*** *communication campaigns"* (German wholesaler, 2024) and "national *campaigns for organic"* (Danish mixed distributor, 2024) would be effective. Two French experts spoke about "*government campaigns such as that of 5 fruits and vegetables per day or that on dairy products"* (mixed processor, 2024) in "TV ***spots*** *with messages from the state on organic"* (distributor organic, 2024). In addition, a French mixed distributor is "part *of one of the only retailers to relay the national organic reflex campaign of Agence Bio*". Indeed, according to a French organic inter-professional association there should be "*organic communication campaigns **in stores"***. A French organic distributor "*uses **social networks** to communicate and make organic more fun*". To carry out these communication campaigns on organic, "there is *a lack of a **standard bearer** of organic for communication, someone who is unanimous, credible and who carries a positive discourse on organic, someone who gives an accessibility image.* » (French consultant, 2024).

- **Transparency**

Organic is facing "a *loss of consumer **confidence"*** (French organic distributor, 2024). Thus, 10 of the experts judge that "the *mobilization of consumers will work through **transparency"*** (German mixed processor, 2024) because "it *is from him [the consumer] that the transition starts, we must give him the information so that he can get involved, this takes away the mental burden of choosing their products"* (French mixed distributor, 2024). The experts mentioned having to be transparent about the origin and remuneration of producers: *"To make organic more attractive, we must display **traceability** and the income price of farmers, because consumers do not measure the consequences of their purchases on agricultural sectors"* (French organic processor, 2024). "***Farmers' remuneration** is an important lever in transparency "* (French mixed distributor, 2024). Furthermore, according to a French organic processor, there should be *"a European law on **environmental labelling** so that consumers understand the impact of their choices"*. 2 experts have also proposed that "the ***Planet score*** *[environmental score] be disseminated everywhere"* (Italian organic processor, 2024).

- **The labels**

"Consumers *are drowning in all these **labels"*** (French organic processor, 2024), in fact, 2/3 of the experts explained that there was "*labels competition*" (French consultant, 2024). We must "clarify *the organic label, taking the example of other labels such as Zero Pesticide Residue [ZRP], which are more meaningful for the consumer"* (French organic processor, 2024) because "the *organic label does not say anything in its notebook charges unlike the ZRP"* (French mixed distributor, 2024). However, according to the experience of this same distributor, *"we wanted to display the organic*

specifications on our house brand products but French law prohibits us from doing so". Added to this is "greenwashing *such as that of so-called regenerative agriculture promulgated by large companies; some retailers are also sensitive to these empty words"* (German organic processor, 2024).

- **Organic education**

Another awareness lever is "consumer ***education"*** (Austrian mixed distributor, 2024), it was addressed by 9 experts. Indeed, "the *impetus for developing organic should come through education, starting with primary school or even kindergarten. THE Citizens should learn where their food comes from, what the impacts of different agricultural practices are, and what is needed for a healthy diet. » (Austrian organic processor, 2024). "Schools and teachers are important actors in providing knowledge, so* ***school curricula*** *should include information about food, nutrition and organic" (German organic processor, 2024).* In addition, an Italian organic processor explained that *"marketing campaigns are not enough, we raise consumer awareness by making interventions and* ***presentations*** *in* ***schools"*** and a German organic processor proposed *"doing* ***seminars*** *on organic"*. The same Italian organic processor also organizes *"cultural activities such as* ***visits to our*** *partner farms or our* ***processing plants"*** because *"experiencing agriculture directly makes organic tangible and creates authenticity, in particular through family farms and direct sales" (German organic processor, 2024).*

- **Test organic**

In addition, taste was discussed by 7 actors. According to them, it is necessary to "highlight the **taste** of organic" (French mixed distributor, 2024) because *"the customer wants local, taste and health" (French consultant, 2024)*. To convince consumers that organic is good, an Italian mixed processor suggests: *"The taste is generally better with organic chicken: we should have consumers* ***test the difference."*** Thus *"offering organic meals in the canteen makes it possible to prove that organic is good in terms of taste" (French mixed distributor, 2024)* and *"awareness would fundamentally change if there were* ***organic in collective catering*** *because consumers would reward the good taste of organic" (German organic processor, 2024).*
It therefore seems important to raise consumer awareness about organic products to encourage them to consume more organic products and thus promote the development of organic agriculture. To achieve this, all players in the food system must get involved by communicating the benefits of organic through information campaigns, more transparency on the origin, the remuneration of producers, the environmental impact and through education.

Topic 2: Working on price accessibility

Although communication on the benefits of organic may make you want to take the plunge, "*demand will only increase if organic prices are more attractive for consumers"* (Greek mixed distributor, 2024), "the *sustainability of organic must come from the price accessibility of products"* (French organic inter-profession, 2024). Indeed, "For *the consumer what matters is the price of the shopping cart and inflation"* (French department council, 2024). All the experts interviewed spoke at least once of price as a lever for developing demand. "Organic must *be between 15-30% max more expensive than conventional, this makes it possible to democratize organic.* » (French consultant, 2024). A French mixed distributor "prohibits *itself from offering certain organic products whose price difference would be too great compared to conventional products"*. For two experts, we must go further: "The *price allows comparison, so it is important that organic has the same price advantages as conventional"* (German organic processor, 2024) because "85% *of our*

customers prefer organic compared to conventional when it is at the same price" (Danish mixed distributor, 2024).

- **The margins**

12 of the experts interviewed mentioned the duty of downstream actors to "make *an effort on the margins"* (French organic inter-profession, 2024) because they "exaggerate *on the margins"* (French departmental council, 2024). According to a German organic association, we need: *"lower margins in organic so that the consumer pays less"*. Indeed, "a *consumer pays a lot for organic because mass distribution sometimes has a 120% margin"* (French organic inter-profession, 2024). The reason for these high margin rates in organic is due to "a *lack of turnover on organic products, so retailers compensate by increasing their margins"* (French organic processor, 2024). To act on margin rates, according to 3 experts it would be necessary *to "regularly monitor the margin rates practiced on organic products by retailers and processors, this would perhaps encourage certain players to be more reasonable and to give back a greater share value upstream"* (French consultant, 2024). We should therefore do like this French collective kitchen: "we *are transparent on everyone's margins"*.

4 other experts speak of using political means to "force *intermediaries to reduce their margins*" (French departmental council, 2024), in particular by having "a *capped margin rate on virtuous products in supermarkets or even a capped gap between the price to the farmer and sale price"* (French consultant, 2024). Only two of the retailers interviewed spoke about the subject, explaining "we *should earn more or less the same margin rate with organic as with conventional, because otherwise you run the risk of losing consumer confidence if you increase the price of organic."* » (Danish mixed distributor, 2024). None of the retailers or wholesalers have commented on a potential drop in their margin rate. As for the processors, those who spoke only spoke of an abuse by retailers of margins, but no reduction envisaged on their scale.

- **Promotions**

Promotions on organic products is a subject that is debated regarding its impact on organic consumption. 2 experts consider that "price *accessibility through promotions is a major lever for boosting organic consumption"* (French organic processor, 2024). For 2 other experts, promotions "is *good for organic sales but not good because it disturbs the consumer with prices that constantly change"* (Greek mixed distributor, 2024) and "it *creates an idea among the consumer that organic is only affordable when it is on sale"* (Danish mixed retailer, 2024). "Organic *needs price stability"* (Greek mixed distributor, 2024). An intermediate solution would be to offer " *continuously low prices for organic* " (Greek mixed distributor, 2024), "*thanks to* ***long-term promotions*** *on certain organic products, which allows the stability of organic sales* " (French mixed distributor, 2024) or by the development of a " *two brand strategy in the organic sector, one of high quality with Austrian organic products and one recently introduced with the aim of making organic products more accessible for all [* ***low-end*** *]* " (Austrian mixed distributor, 2024), this last strategy was mentioned by 3 experts. In this same approach, "we should take the example of Germany where 50% of organic sales go through hard discount brands" (French consultant, 2024), particularly because "if organic production increases, as a processor we will have to sell to hard discounters due to overproduction" (German mixed processor, 2024).

- **VAT**

Another proposal mentioned by 12 experts to reduce the selling price of organic products concerns VAT. This subject is also debated. 8 of them talk about *"lower VAT on organic products"* (Italian mixed processor, 2024). Alternatively, a German consultant suggests *"making conventional agriculture more expensive with smart taxes"*. 3 other experts talk about "prioritizing

the most virtuous products downstream, with nutriscore, planetscore... and modulating by VAT. Products with a negative impact on health and the environment have a higher tax and virtuous products have a lower tax" (French consultant, 2024). Precisely, "the *additional benefits of taxation would go to the agricultural transition. For example, Denmark is the country that has reduced its pesticide consumption the most because they have increased the tax and this helps finance the transition to better agricultural practices"* (French mixed distributor, 2024). 3 experts think that "simply *reducing VAT on organic products has very little impact"* (French consultant, 2024). A German mixed distributor explains "retailers *like us are not in favor of a reduction in VAT because it is complicated and it makes organic products more prone to fraud, some conventional processors will use greenwashing to make a product non-organic, organic and obtain a lower VAT"*. 7 experts did not specifically speak about differentiated taxation but about the need "to *internalize external environmental costs, which would make conventional products more expensive"* (Austrian organic processor, 2024). The reason stated by a Danish wholesaler is that "we *pay taxes for the treatment of water that has been contaminated by conventional agriculture, while we pay more to consume organic products, it is not fair"*. Thus, there is a need for government support because "the *price comparison between conventional and organic must reflect the effects on the environment and society, which lies in the hands of politicians"* (German Organic Association, 2024).

- **Productivity**

10 experts addressed the subject of productivity and efficiency, in fact "*to reduce prices, **processors** must make their processes more **efficient,** it is not up to organic producers to lower their prices "* (German organic processor, 2024). Indeed, " *Organic farmers in animal production are often in conventional cooperatives, to benefit from processing tools and the **productivity** of these tools "* (French consultant, 2024). In addition, *"productivity gains must take place at the level of **stores** and **purchasing centers,** in processes and organization.* » (French consultant, 2024). These 10 experts also suggest " ***massifying volumes** in order to lower the price of organic at the consumer level "* (French mixed distributor, 2024). According to a Danish mixed distributor " *if you make **economies of scale** you can obtain a low price difference between organic and conventional processed products, because only 25% of the price of processed products comes from the price of the raw material, the rest of the cost comes of transformatio "*. According to a German organic processor, " *fixed costs are higher when you are a small processor "*, it is therefore necessary to " *create **organic processing tools together** "* (Danish mixed distributor, 2024) and " *have **large manufacturers** who democratize organic because large volumes allow prices to be driven down "* (French organic processor, 2024).

- **Packaging**

Finally, two processors spoke of their strategy of " *making smaller organic **packaging** and products so as not to exceed psychological prices "* (French mixed processor, 2024), in fact " *to lower the price of organic, we work on **product mix** to make it more attractive, by lowering the quantity in the package "* (French organic processor, 2024).

This axis involves using several techniques to reduce the selling price of organic products in order to change the price image that the consumer has of organic products. Downstream players could carry out promotions, offer different levels of ranges, increase their productivity and their volumes. The government could also intervene on margins or VAT.

Topic 3: Innovate on organic products

Innovation was addressed by 15 experts during their interview, in fact "organic is a market of innovation, we must develop new products" (French mixed distributor, 2024) because "it is the consumer who gives the "impulse, but the actors must make them want to consume organic" (French collective kitchen, 2024). Specifically, "if retailers and processors work on an offer adapted to the expectations of organic customers, there is a path" (French consultant, 2024). For retailers, innovation can notably be done "in organic private label [house brand], they must continue to innovate" (French mixed distributor, 2024).

- **Consumer desires**

Experts suggest that innovation must be based on the following elements: "The customer wants local, the circular economy, taste, health. » (French consultant, 2024). "Taste and pleasure must be put back at the centre of organic, in organic stores this has often been forgotten" (French mixed distributor, 2024), in fact "we must make organic products that are good because taste is important for the consumer" (French mixed processor, 2024). The subject of taste was addressed by 8 experts. Innovation can also be done on packaging, two experts suggested this because "people want as little packaging as possible, zero waste stores work very well economically" (German organic processor, 2024). According to a French consultant, "the higher the price, the more consumers will want organic harvesting and manufacturing sectors and zero waste". The origin of the product is also of interest to the consumer "the *consumer expects organic and* ***local*** *at the same time"* (French mixed distributor, 2024). Indeed, "a *big consumer of organic consumes 18% organic and the rest pays close attention to French origin or* ***fair trade"*** (French organic processor, 2024). 15 experts spoke about premises and 5 spoke about fairness. We must "differentiate *ourselves by doing fair trade on organic products"* (French mixed processor, 2024).

- **Processed products**

« O*rganic products have fewer additives"*, "*processors should focus more on creativity, by developing more organic* ***processed products***" (Danish mixed distributor, 2024). For example, " *in the* ***ready meal offers*** *in supermarkets there are almost no organic offers "* (French consultant, 2024), " *they must explore the development of organic* ***sandwiches*** *or organic ready meals "* (Danish mixed distributor, 2024), although this strategy "will *not necessarily work for all customers, especially customers who are big fans of organic, not a fan of microwaves, not a fan of processing "* (French consultant, 2024). In mass distribution, it is also necessary to "offer ***a differentiating offer*** *that cannot be found anywhere else, such as with* ***plants"*** (French consultant, 2024). Indeed, "new *products can be developed according to global trends such as veganism"* (Austrian mixed distributor, 2024), "*vegans are more concerned about the climate and it is therefore a market to develop in organic"* (Danish mixed retailer, 2024). This trend was mentioned by 5 experts.

- **Mirror products**

An expert explained that "*in bakeries, organic is reserved for special breads, not traditional baguettes"* (mixed processor, 2024). We must therefore "work *on the creation of* ***mirror products,*** *these are conventional products which work well, which we can also make organically"* (Danish mixed distributor, 2024). The technique here is to "look *at what sells well in supermarkets and identify where organic is not developed enough"* (French consultant, 2024).
Thus, it seems necessary for processors and retailers to innovate on their organic product offerings, to make them more desirable, in particular by creating products that meet consumer desires and processed products that do not yet exist organically.

Topic 4: Give visibility to organic products in the sales strategy

There are several sales strategies that will contribute to the growth of the organic market. We previously talked about price accessibility but "*a major lever for boosting organic consumption is physical accessibility, by being present in the places where we buy this type of product*" (French organic processor, 2024). Indeed, "*we must give visibility to the organic offer among consumers*" (French mixed distributor, 2024).

- **Online sale**

5 experts mentioned that it was necessary to "take advantage of new opportunities such as e-commerce" (French consultant, 2024) particularly because "*35% of those under 35 buy on the internet, so we need to talk to young people*" (French organic distributor, 2024). A French distributor explained that they used "*the drive as a lever to boost organic sales because it sells better on the drive than in stores*". And finally, a German organic processor "*reaches the end consumer directly through our online sales site*".

- **Physical points of sale**

According to an Austrian organic processor, "distributing *organic sales between several points of sale is a good way for* ***processors*** *to have a stable income and be more resilient"*. The following sales points were addressed by the experts. In France, "50% *of sales of organic products go through supermarkets, this is an important lever"* (French consultant, 2024). An organic distributor himself confirmed this statement: "The *supermarket is a good lever for the organic market, as a specialized store we do not want to be the only sellers of organic because we want to democratize organic.*" For a German organic processor, "it's *better to target* both ***organic stores*** *and conventional stores.*" Moreover, organic stores should "take *inspiration from stores in the United States where* ***on-site catering*** *and catering services are offered"* (French consultant, 2024). Another French consultant suggested that " *specialized stores must dare to go to areas that are not saturated, areas* ***with less potential*** *(less purchasing power) and adapt their offering to these areas with stores priced at less than a million turnover to develop price accessibility.* ". As mentioned in the section on price accessibility, a German mixed processor recalls that in Germany "conventional *distribution, in particular* ***hard-discounters,*** *is the biggest player in the sale of organic products"*. For a German organic processor, another type of store could be a sales lever for organic "health*"* ***products. food stores*** *[* stores which mainly sell natural, organic foods, local products and food supplements] *work very well in Germany, better than organic sales in organic stores or in conventional stores.*" Otherwise, an Italian mixed processor says he considers "the *sale of our organic chickens to* ***butchers*** *or* ***gourmet grocery stores (delicatessen),*** *there is potential for organic because the quality is better"*.

- **Organic ranges**

According to a French consultant, "Organic *sales will only be able to restart when there is a stop to the rationalization of organic products in supermarkets and an increase in demand.* ". This point was confirmed by 10 experts. A French organic distributor states "organic *must return to supermarkets"* because "guaranteeing *volumes allows us to have loyal consumers and producers"* (mixed processor, 2024). According to a French mixed distributor, "In *2023, there was a big difference in strategy between the supermarket brands, those who during the crisis cut their organic range and those who kept* ***a good level of assortment,*** *those who maintained the offer like us, regain market share in 2024". Indeed, "if one distributor starts to* ***increase its organic range,*** *other retailers will probably do the same and this will have a significant impact" (German consultant, 2024). In Denmark for example, "retailers must have at least 400 organic products to be considered by*

consumers" (Danish mixed distributor, 2024). An Austrian mixed distributor was however reluctant to the idea of increasing the organic ranges because "The space on the shelves is limited so it is hard to expand the range of organic products" "if the organic range increases that means that the conventional range must decrease." The role of maintaining and developing organic ranges does not, however, rest solely on retailers, in fact according to a French mixed distributor "among retailers there has been a reduction in the organic offer, but it is also because of mixed processors who lower their assortment because they were doing organic out of opportunism" (French mixed distributor, 2024). To guarantee a significant offer of organic products for the consumer, 2 experts suggested state intervention to "force supermarkets to have a minimum percentage of organic in their assortment" (French organic interprofessional association, 2024) and to "expand Egalim [French law imposing a percentage of organic in collective catering] to wholesalers" (French consultant, 2024).

- **Implementation of organic products in stores**

Another avenue of action noted by 4 experts is *"the implementation of organic in stores" (French mixed distributor, 2024).* 3 strategies are proposed. A Danish mixed distributor explains *"we no longer have an organic corner, organic products are* ***distributed in the original shelves*** *alongside conventional products, since we made this change our organic sales have increased by 30%"* because *"consumers can realize that the price difference is ultimately not that significant with the conventional."* For a French mixed distributor, there is a nuance to be made to these remarks: *"We have chosen to* ***maintain the organic corner.*** *I am convinced that if the market resumes the explosion of the organic section it is a good thing especially if organic products do not have too much price difference with conventional but in times of crisis it is dangerous because there still has a risk of a reduction in supply.* A French organic processor offers a solution to decide: *"employ a* ***dual strategy*** *of maintaining the organic corner and disseminating organic products on their original shelves".*

- **Staff training**

To conclude, 5 experts spoke of a need to "put *resources and time back into the* ***training of personnel*** *who work in organic farming"* (French consultant, 2024) because "there *are many incompetent workers in the organic sector"* (German wholesaler, 2024). According to an organic distributor, there is " *too much uniformity in the profiles who work in organic, too many commercial profiles which are* ***too far from agricultural reality,*** *we must hire or train decision-makers who understand the sector and uphold the* ***values of organic*** ". In addition, the training can also be aimed at buyers because according to a French mixed processor "Buyers *in supermarkets do not understand fair trade and do not focus on the* ***differences between labels"***
This section implies that processors and retailers diversify their sales strategies. In fact, processors can rely on numerous points of sale and develop their organic range. For their part, retailers could develop online sales, their organic range as well and think about their strategy for implementing organic in stores. Training sellers and buyers can support the development of organic sales.

Topic 5: Spread organic in out-of-home catering

The experts interviewed consider that "out-*of-home catering is super important for the development of organic"* (German organic processor, 2024) because it "represents *25% of household purchases"* and that "it *is an additional market that does not cannibalize other organic sales"* (organic processor, 2024). The French chef in collective catering proposed: "as *economically it is difficult to do 100% organic, to begin the transition you* must **gradually introduce**

organic into your product composition, this allows you to save money. learning to use these new products.

- **Commercial catering**

In OHC, "*Commercial catering is a lever for developing organic because out-of-home consumption has increased"* (French consultant, 2024). However, 2 experts mentionned that it is more complicated to sell organic to commercial catering *"because the players work mainly with wholesalers and because organic costs more"* (French consultant, 2024). Indeed, "restaurants *prefer to work only with one supplier, they buy from wholesalers"* therefore "as *a processor it is better to sell directly to wholesalers"* (German organic processor, 2024).

- **Private collective catering**

According to 4 experts, private collective catering is also an interesting market for organic. The reasons are that "Company *canteens want more and more organic because it gives them a competitive advantage and it can be used in their marketing"* (Danish wholesaler, 2024), moreover "Company *canteens have more means than public canteens, it is therefore the best lever"* (French organic processor, 2024). To encourage players in collective catering (private and public) an expert explains that "in *Denmark we have organic certification for canteens and restaurants, there is a bronze, silver or gold medal depending on the percentage of organic purchases, this provides a competitive advantage"* (Danish wholesaler, 2024).

- **Public collective catering**

Specifically with regard to public collective catering, 20 of the 28 experts interviewed consider that "canteens *should be organic"* (German organic processor, 2024). And more than half think that "in *the collective catering sector, the development of organic must come from policies, for example through regulations on the organic portion in public canteens"* (Austrian organic processor, 2024). In particular, the French experts all cited the need to "strictly *apply the Egalim law* » (French mixed processor, 2024) because "school *catering affects all children and therefore indirectly parents, therefore raising awareness of organic consumption*" (French organic distributor, 2024). The Egalim law requires French canteens to source at least 20% of their products from organic products; however, it is not binding. For a French inter-profession "we *need sanctions if we are not at 20 %*" (French organic inter-profession, 2024).
3 experts wanted to qualify the importance of this lever because "Public ***collective catering*** *only represents 10% of outlets for organic producers, so it cannot be the only lever"* (French departmental council, 2024), it "won't *save the organic sector, but it is a help"* (French consultant, 2024).

- **Training**

Among the experts who spoke on public collective catering, the subject of training of actors came up several times: "We *need to do training, we need the* ***cooks*** *to understand the product they are working with, we need to* ***meet the producers,*** *to take them to the farms"* (French departmental council, 2024). There is also a need *for "advice and* ***support*** *in addition to* ***the application of the Egalim law*** » (French organic inter-profession, 2024). According to 2 experts, training must address the following problem: "in *canteens or restaurants there is sometimes a lack of knowledge about cooking and eating, some only reheat prepared meals"* (German organic processor, 2024). This is in particular the role of "departmental ***advisors*** *[who] must support cooks,* ***purchasing managers*** *and* ***purchasing centers*** *in their transition to more organic"* and "train *collective catering agents in* ***cost control"*** (French departmental council, 2024).

- **Lower your costs**

As mentioned above, in collective catering it is important to control costs, especially because "the *public budget is low for organic collective catering"* (French consultant, 2024). Indeed, "the *kitchens all work with a price limit, there have already been tests but organic is always too expensive"* (German organic association, 2024). In order to overcome the brake on the price of organic products, a French departmental council offers several techniques to control costs: " *Train cooks in collective catering on the use of* ***local and seasonal raw products*** *because it costs less than processed products as there is better amortization of the cost of raw materials "* or even *"making* ***smaller kitchens*** *in collective catering in order to have the* ***fewest intermediaries,*** *and therefore to limit food waste and the resulting costs".* Other techniques were also mentioned by several experts, such as the idea of *"working with organic vegetable proteins which compensate for organic animal protein which is too expensive for collective catering" (Danish wholesaler, 2024)* or even *"working on the menu to promote the entire carcass" (French collective kitchen, 2024),* that is to say *"value the whole animal rather than just the noble pieces, the actors of collective catering can organize themselves to distribute the balance of the carcass or training on techniques for cooking less noble pieces"* (French departmental council, 2024 *).*

- **Supply**

In addition to a supply of organic products, the two experts specializing in collective catering interviewed attach a lot of importance to local, for them "we must relocate the supply, working with local producers and shorten the number of intermediaries » (French departmental council, 2024). But for this, "European public purchasing rules should take into account the territorial anchoring of food and make it possible to encourage the purchase of local products" (French collective kitchen, 2024) because currently "the French Egalim law favors local but European law prohibits favoring local over European by requiring public procurement" (French departmental council, 2024).
It would therefore be necessary for processors to sell more to commercial, private collective and public collective catering, and for players in these sectors to source more organic products, with the support of public agents to better train and advise them.

Topic 6: Support organic producers

Although this study focuses on the downstream of the value chain, all the experts spoke at least once about the agricultural upstream, explaining that "*the problem does not come from the upstream*" (French mixed processor, 2024) and that the downstream had to have "a *strong link with the agricultural upstream, that's the key "* (French mixed distributor, 2024). This lever is important because "d*ownstream can make upstream want to commit to organic"* (French mixed distributor, 2024).

- **Contracts**

The first lever for action in this sense, mentioned by 18 of the 28 experts, is the creation of "long-*term contracts", which "are necessary for producers"* (German mixed processor, 2024). "*Long-term contracts are a means of promoting organic products"* (German organic association, 2024). These contracts make it possible to "secure *the volumes of retailers and producers"* (French mixed distributor, 2024) as well as to "guarantee *fair prices, that's super important"* (Danish mixed distributor, 2024). Fair prices for farmers mean *"working on purchase prices so that they cover production costs"* (French mixed distributor, 2024). It is an approach that can be accompanied by "fair-*trade certification, which is super important because organic certification does not guarantee social impact"* (Italian organic processor, 2024). An Italian organic processor told us about the

fact that he needed "regularity *and continuity in our supplies, so we ask our producers to sell us at least 50% of their production and in exchange we guarantee to buy from them at least 50%. % of their production.*
Contracts can be made between more than two actors, we then speak of "making *innovative tripartite contracts between organic producers, processors and retailers"* (French consultant, 2024). This type of contract was put forward by three experts, including two retailers.
The duration of the contracts can vary depending on the experts but all agree on a contract "of *more than one year, to allow them to plan their harvest and their investments"* (Italian mixed processor, 2024). In addition, according to the Egalim law, "intermediary *buyers must enter into a contract with the producer for at least 1 year with a price agreement and a review clause every 3 months" (French departmental council, 2024).* A Danish mixed distributor explains: *"we have longer contracts than those of our competitors, 2 years"* and a French mixed processor suggests *"offering multi-year contracts with producers over 5 years to ensure stability and fair prices."*
However, for two French experts, *"cooperatives and processors already do a lot of contracting, this is not what will change the situation in the long term because it is a good tool only when we have an increasing demand" (French organic inter-profession, 2024).*

- **Integrated supply chains**

Otherwise, to promote collaboration with producers, 7 experts explain that it is necessary to operate in the form of *" a producers' cooperative" (Danish mixed processor, 2024)* and therefore *"have an integrated supply chain, where we produce and transforms"* because *"for us it is not complicated to talk to the different links in the chain because we have knowledge and visibility throughout the chain"* (Austrian organic processor, 2024 *)*. In particular, a German organic processor gave the example of *"Biocoop [organic store] in France, which was founded as a producers' cooperative so they can offer good prices to farmers".*

- **Financing**

15 experts spoke of the need for *"financial support at the necessary upstream level"* (French consultant, 2024) because *"organic is very expensive to produce" (French departmental council, 2024).* This role can be played at the downstream level, in fact *"the role of processors is to provide pre-financing, it is vertical integration" "we have, for example, pre-financed the harvests of apple producers"* (organic processor French, 2024). This measure constitutes significant aid for organic producers because *"producers must pre-finance their production themselves over a long period until their product is sold" (German mixed processor, 2024)*. Insurance also has its role to play because it can finance *"the risks taken by farmers to improve their practices"* (French mixed distributor, 2024). Additionally, *"banks can support the transition of organic farmers, especially during their conversion"* (Danish mixed processor, 2024). It is also private companies that can, using their *"private funds", "finance and invest in organic projects" (Italian organic processor, 2024).*
Finally, of these 15 experts, 12 explicitly spoke of a need for *"more subsidies for the organic sector"* (German mixed processor, 2024) notably through "a *greater allocation of the CAP for organic, because we do not use this structure completely"* (Danish mixed distributor, 2024). Specifically, the experts ask that these subsidies go to *"aid for maintaining and organic eco-diets at least up to what the CAP can provide"* (French organic inter-profession, 2024). Furthermore, *"the increased costs of organic certification and the costs of organic animal feed, particularly aquaculture, should be subsidized by political means"* (Greek mixed distributor, 2024). Two experts also spoke about the government's financial support for small organic producers because *"to remain competitive and maintain their activity, compensation for the smallest farmers is necessary as they cannot produce at the same price as large producers"* (Austrian mixed distributor, 2024). Otherwise, *"the CAP should see the farm not as a single unit but as part of a farm group in the form of a cooperative",*

"the money should be given to the cooperatives then redistributed to the farms" (Italian organic processor, 2024). According to a French organic inter-profession, it is not only up to the Ministry of Agriculture to finance this transition but also *"the Ministry of Ecological Transition and the Ministry of Health"* (French organic inter-profession, 2024).
However, 5 experts specified that it was necessary to pay attention to the fact that *"the CAP is an administrative monster", "adequate funding should be easily accessible"* (German organic processor, 2024), *there is therefore a need to "reduce the administrative burden on farmers"* (Danish mixed processor, 2024).

- **Short circuits**

Finally, in order to ensure organic producers a decent income, 9 experts explained that it was necessary *to "source supplies from a short circuit as much as possible"* (French mixed processor, 2024). This makes it possible to *"avoid speculation and allow all stakeholders to make a living from their work"* (French collective kitchen, 2024). In addition, *"go directly through producers for purchases rather than through intermediate buyers or traders to strengthen the farmer"* (French organic processor, 2024). For their part, organic producers can *"have a small store on the farm for* ***direct sales"*** (Austrian organic processor, 2024) because *"organic producers in short circuits have an easier time making their costs understood to consumers, there therefore has fewer deconversions than organic producers in long circuits"* (French departmental council, 2024).

There is a consensus here on the need to massively support organic producers. This support can be provided through long-term contracts, the construction of integrated value chains or producer cooperatives, through public or private financing and finally by sourcing supplies through a short circuit.

Topic 7: Choose your market: national, European, international

- **Import-Export**

One of the subjects that is highly debated is the organic import-export strategy. 11 experts think that "export *is the key"* (German organic processor, 2024), in fact "export *is needed to develop organic"* (French departmental council, 2024). However, "those *who like organic want local so it's hard to export organic products"* (Danish mixed distributor, 2024). We must also "focus *on European organic imports"* (Austrian mixed distributor, 2024). There are several reasons why the import of organic products is important for the experts interviewed : There are several reasons why importing organic food is important for the experts interviewed: 'products that can't be supplied in France have to be sourced in their country of origin to preserve quality' (French collective kitchen, 2024), but also " *for taste it is necessary to import from where the products are the best, to favor local quality "*, "*for example, lemons from Menton in France are not suitable for pressing unlike Italian lemons "* (French organic processor, 2024). Furthermore, "*legumes, for example, are not sufficiently produced in Europe so we import from Canada, Argentina, the USA, China… and production costs in Europe are too high"* (German organic processor, 2024). According to a French mixed distributor "there *will always be an economic interest in importing organic products but they do not have the same social, health and environmental standards as us, which slows down the development of French organic products"*.

- **Local**

For 5 experts, import-export is not the strategy to prioritize for developing the organic market but rather the local one. Experts explain that they want to "focus *on the German market for logistical*

reasons, particularly for fresh products" (German organic processor, 2024) or even "we *are more focused on the development of the local market in Italy rather than the export"* (Italian organic processor, 2024). 2 experts proposed as an intermediate solution: "For *a French company that decides to export, it is necessary to see if it is possible to remake the products with local ingredients"* (French mixed distributor, 2024) and to "create *synergies with local businesses"* (French organic processor, 2024). One of the reasons for this prioritization of local is that "import-*export is not an opportunity because it has lost the consumer on organic specifications"* (French mixed distributor, 2024).
For 13 experts, it is necessary to "*favor local supply"* (French mixed processor, 2024) "when *the volumes are sufficient locally"* (French organic processor, 2024) and that this "respects *regional conditions and seasonality"* (organic processor Austrian, 2024). For a French consultant, "organic *must be locavore above all"*. To achieve local sourcing as much as possible, it is necessary to "*relocalize processing tools"* (French mixed processor, 2024) and "*help develop local sectors if they do not exist "* (French collective kitchen, 2024). A French organic distributor explained to us that we had to respect "the *main rule: proximity"*, *"the premises are too limited"* for example "when *we are in Strasbourg it is a good thing to import from Germany, it's better than importing from the south of France, more proximity" so "it must be done according to the carbon footprint of transport"*.
So, while it's important to prioritise local or nearby organic products wherever possible, imports can provide a more diversified, high-quality supply at attractive prices. However, it is important that these products comply with the standards of each country.

Topic 8: Collaborating within food systems

We talked about collaboration with producers, but it is also important to talk about collaboration between all the players in a food system. We need to "discuss together more" (French mixed processor, 2024), "organize meetings" (French consultant, 2024) because "cooperation within the value chain is essential" (Austrian mixed distributor, 2024). This is what 26 of the 28 experts interviewed think, the others not having expressed themselves on the subject.

- **Get involved in organic associations/inter-professions**

For more collaboration, according to 9 experts, downstream actors must "*be part of an organic association and not only be a member but also act*", "*there should be more processors in organic organizations*" (processor German organic, 2024). These associations make it possible to "promote exchanges between member actors to agree on common actions to be carried out in order to avoid acting in a too dispersed manner" (French organic processor, 2024) and to "negotiate *with the different actors"* (French consultant, 2024). Several associations were cited by the experts such as " *we must work with the FNAB and the Organic Agency "* (French organic distributor, 2024), " *the GMS must form partnerships with organic inter-professions and organic associations as in Germany with Naturland and Bioland* » (French consultant, 2024) or even " *be part of Synabio,, ANIA and FNAB "* (French mixed processor, 2024) and "*we are members of AOL and IFOAM "* (German organic processor, 2024).
To go further, 4 experts suggest " *having a non-political but rather commercial structure "* (French consultant, 2024), *"a special agency which helps producers, processors and retailers, and which is responsible for informing consumers about the benefits of organic "*, " *this agency would include all organic associations and researchers like ITAB to exchange ideas and develop changes to support organic agriculture and aquaculture "* (Greek joint distributor, 2024). Which means that rather than having several organic agencies, experts suggest that there be one which brings together all the players.

- **Lobbying**

9 experts also spoke of the importance of "not *minimizing its role of influence on public policies"* (French mixed distributor, 2024) because "when *everyone is committed to organic, it allows us to challenge the government"* (French organic distributor, 2024). For example, "IFOAM *is the only organization doing organic lobbying, there should be more initiatives like that"* (German organic processor, 2024). In particular, two aquaculture experts explained that "in *organic aquaculture there is a lack of a big lobby"* (German consultant, 2024). To overcome this, a French mixed distributor suggests "we *could professionalize the organic authorities in public affairs"* because "*to influence the demand for organic we need laws to constrain, a lot of lobbying and power play"* (French advice departmental, 2024).

- **Territorial organization of production**

According to 3 experts, "there *is a lack of an organization that coordinates everyone's interests and asks the following questions: what does the market need? Who is available to produce organically? who can transform?* » (German mixed processor, 2024). Indeed, "*we must build sectors according to operator demand, it is a matter of providing the right volumes according to market needs"* (French organic inter-professional association, 2024). We therefore need *"a territorial organization of production, where we decide collectively what is produced and in what quantity, in order to avoid over-production of certain products which will cause prices to fall, and under-production of other products which will raise prices"* (French collective kitchen, 2024).
In addition, in order to better organize organic production and supply in the territory, 2 experts mentioned the idea of creating networking and logistics platforms, this is a tool already set up in France and managed by public authorities, it *"geolocates local suppliers in relation to buyers and puts them in touch to allow them to carry out mini public markets, there are 38 member departments"* (French departmental council, 2024).

- **Collaboration within the downstream**

Downstream actors can also collaborate with each other. Indeed, according to 3 experts, *"retailers must talk with manufacturers about the strategies adopted by reassuring them that they are staying the course in organic"* (French mixed distributor, 2024) because *"so that the rest of the chain value can be prepared, it is better for retailers to have a clear organic strategy and to communicate it with the rest of the players "* (German consultant, 2024). To go even further in collaboration, a French organic distributor *"collaborates with other retailers, therefore our competitors through Synabio"*. A Danish wholesaler explained that they have *"developed a tool to inform our customers [collective and commercial catering] about the origin of our products and their ecological footprint, we are transparent with them"*. As for processors, a French organic processor suggests *"collaborating with retailers to show them what organic can bring them financially and marketing, based on studies carried out internally"*. Finally, a German organic processor *"meets competitors, therefore other processors, to see how we could collectively help our producers, it is a pre-competitive strategy"*.

- **The research**

Downstream actors can also *"work on research and development around tools that can be used by organic and conventional farmers" (Danish mixed processor, 2024).* To contribute to this, *"we need to invest in research, particularly research on organic seeds"* and for *"research organizations [AKIS] to do more research on agricultural practices" (Italian organic processor, 2024).* Indeed, *"we must promote research in organic agriculture at European and national level because in recent decades new technologies have made it possible to simplify organic farming, so more research would help*

*promote innovation and facilitate the establishment of organic farming» (*Austrian organic processor, 2024). Research is a lever for collaboration which was mentioned by 4 experts.

Collaboration appears to be a strong lever for creating more structured and sustainable organic sectors, in particular by engaging in organic associations or inter-professions, by creating a common organization to organize production and coordinate the sector's actions and finally by financing research.

6.4.Annex 4: Interim report presented for the 2nd round

How can changes be made at the downstream level of food chains to promote the development of organic agriculture by 2030?

Convergence of views of European experts

After interviewing 28 European experts from France, Germany, Denmark, Italy, Austria and Greece on the above topic, we have written this document summarizing the main strategies mentioned by stakeholders that can be implemented implemented in the years to come to contribute to the growth of the organic market in Europe. The experts interviewed are processors, retailers, wholesalers, consultants, organic associations and players in collective catering.

You will find the main intervention levers mentioned during our first series of interviews. Some of the statements in this report were addressed by several experts while others only by one expert; we have chosen to include both in order to gather your opinion on a diversity of strategies.

For the second round, we ask you to think:

- What elements do you agree or disagree with? For what ?
- *What strategies would you like to provide more detail on, particularly regarding its implementation?*
- *Would you like to mention any other strategies that are not mentioned in this document?*

Raise consumer awareness of organic products through coordinated communication

Coordinated communication between retailers, politicians, processors, NGOs, specialized organic agencies and the media is crucial to raise consumer awareness of the benefits of organic. This communication must highlight the environmental, health, nutritional and animal welfare benefits, so that the organic label can differentiate itself from all competing labels which sow confusion among consumers. To work on the desirability of organic products, taste and pleasure are also important elements to include in communication. Organic products must demonstrate transparency to consumers through clear information on the origin and remuneration of producers, as well as through environmental/climate display.
Allocating a substantial budget for organic communication is a key lever for its development, in order to enable the launch of attractive organic campaigns among all stakeholders. Government awareness campaigns should include messages encouraging organic consumption. Furthermore, teaching about organic farming and the health benefits of organic could be developed in school programs and through field visits to farms or organic processing units.

Working on price accessibility

Price remains a major obstacle to purchasing organic products. To increase demand, it is necessary to reduce the price gap between organic and conventional products. Processors, wholesalers and retailers play a crucial role, particularly by reducing their margins. The government should impose transparency on the margins and regulate them to avoid abuses.
To democratize organic, we should offer long-term promotions on certain organic products or high-end and low-cost segmentation of organic products. Developing hard discount organic products would also contribute, provided we continue to pay a premium price to farmers.
Reducing VAT on organic products or increasing that on less virtuous products is another proposal. Although controversial, this measure could serve to internalize the negative externalities of conventional practices (cost of public health and water depollution), lower the price of organic and finance the agricultural transition.
Improving productivity at the processing level, purchasing centers and stores, and increasing volumes can also allow a reduction in prices through economies of scale. Therefore, organic processing tools must become more efficient and possibly be shared between several organic players to reduce fixed costs.

Innovate on organic products

Creativity and innovation among processors and retailers are interesting levers for making organic products more attractive. Consumers are looking for products that combine pleasure, taste, fair trade and local. By offering organic products that meet these criteria, demand can be revitalized.
There is an increased need to develop organic processed products. Organic ready meals and sandwiches, as well as plant-based/vegan product lines, offer growth opportunities. The strategy of creating mirror products, by adapting the best-selling conventional products to organic, could be an effective strategy.

Give visibility to organic products in your sales strategy

Processors and retailers can play a central role in the development of organic products by making these products more physically accessible, via e-commerce and drive-through, as well as by opening organic stores in areas with lower purchasing power. Organic could also develop in hard discount, health food stores (*type of grocery store which mainly sells natural, organic foods, local products and food supplements*), delicatessens and other local businesses (bakery, butcher, etc.).
It is crucial to increase demand that processors, wholesalers and retailers maintain and develop their organic ranges. Government regulation imposing a certain percentage of organic in stores could be considered. In addition, to give more visibility to organic products, a double presence in stores with the maintenance of the organic corner and the distribution of organic products in the original departments can be beneficial when the price difference is small. Sellers should also be trained on the benefits of organic products to guide consumers in their choices.

Boosting organic in out-of-home catering

Out-of-home catering represents a significant portion of household food consumption. Integrating more organic products into these sectors would be a major lever for the development of organic. Obtaining a label certifying the percentage of organic sourcing could be an interesting competitive advantage, especially in commercial and private catering. With greater financial resources than other players, private collective catering would offer a good prospect of development for organic. In terms of collective catering, it would also be necessary to put in place legislation imposing a certain percentage of organic in canteens, while ensuring that administrative census procedures are simplified.
Training cooks, purchasing managers and purchasing centers is crucial for a successful transition to organic sourcing. Training should cover the use of new products, sourcing regional products and cost management, essential in organic because prices are higher. To control costs, collective catering can develop menus with raw seasonal products, organic vegetable proteins, and allowing the entire animal carcass to be used. Developing smaller collective kitchens, limiting the number of intermediaries, could reduce food waste and associated costs.

Support organic producers

Multi-year tripartite contracts guaranteeing volumes and purchase prices, ideally with an upward price revision clause, would bring stability and security to organic producers. They allow producers to plan their harvests and investments. Pre-financing of harvests by downstream stakeholders and insurance for the risks taken by farmers in conversion are important support measures.
Organic supplies through short circuits and locally must be favored to preserve the margins and income of local producers. Platforms for connecting local buyers and producers can be a lever. Buyers must also be trained to understand the benefits linked to these types of purchases.

Import-export strategy

The majority of experts believe that the import and export of organic products are key factors for the development of the market. For reasons of taste and quality of organic products, it is sometimes preferable to import from the country of origin rather than produce locally. However, imported products should meet the social and environmental standards of the country where they are sold.

Collaborating within food systems

Downstream actors must become more involved in the co-construction of local sectors by engaging in the territorial fabric, via associations bringing together different actors in the value chain such as inter-professions, cooperatives and organic federations. Organizations representing the interests of organic stakeholders are powerful levers for making your voice heard. We must therefore professionalize organic bodies in public affairs to enable effective lobbying.
The territorial organization of production can help avoid surpluses or shortages of organic products. The development of integrated supply chains, in the form of production cooperatives, can contribute to this and promote better collaboration between stakeholders.
There is also a major need for all these actors to invest in collaborative research projects on organic agriculture to develop new knowledge and new agricultural practices and technologies.

6.5.Annex 5: Aquaculture Interim report presented for the 2nd round

How can changes be implemented in the food supply chain to promote the development of organic aquaculture by 2030? Converging views from European aquaculture experts

After interviewing some European experts on the above topic, we have compiled this document summarizing the main strategies to implement in the future years to help grow the organic market in Europe. The experts interviewed are consultants, researchers, processors and retailers.

You will find the main areas of intervention mentioned during our first interview round. For the second round we ask you to think about:

- On what elements do you agree or disagree with? Why?
- On which aspects would you like to give us more insights?
- Do you have any other strategies you would like to mention that are not cited in this document?

Raising consumer awareness of organic through better communication

It is difficult to explain to European consumers what aquaculture is in general, what are the challenges in the sector (e.g., most important cost driver in organic aquaculture is feed) and what is the aim of organic aquaculture (difficult to highlight strengths). But, since retailers are the main motor of organic aquaculture, they would have to act on better communication. Retailers and distributors are the ones deciding what is on the market/about volumes and can thus support the development of the sector the most. In particular, specialized organic retailers need to more actively communicate the benefits of organic aquaculture products.

Action to contrast lack of information on consumer side is crucial. What will help even more, is for the consumer to finally understand what fish from aquaculture really is, in fact most of the consumers think that it is not good eat! Highlight quality and sustainability of organic seafood would generate greater consumer trust.

NGOs like Naturland are very important for informing and educating consumers about organic products. It would be beneficial if such NGOs would support the marketing of organic products even more, thus helping organic fish farmers to have better market access.

Supporting organic producers

The EU's organic production system must undergo a better economic impact assessment. Indeed, for organic seafood producers there are few certainties in terms of planning and opportunity to achieve an economic livelihood that is closer to the EU's average. Market will not regulate itself, most important levers should come from politics and governments, but strong associations lobby are important too.

Financial support through governmental programs should be enforced, because organic certification is so far only supported along/next to other sustainable action (no differentiation between organic and other schemes not requiring as much investment).

Currently there is no or little incentive for producers to convert to organic aquaculture. Indeed, farmers must pre-finance for a relatively long time (long production cycle in aquaculture until the

product can be marketed). Therefore, they are only willing to do the investment if convinced that someone will buy the organic product and pay a premium price.

Selling prices and production costs

Nowadays, people are having second thoughts when buying conventional chicken, so imagine when they face the price of e.g. organic seabream or seabass.

The problem arises from the production side, because production is so small, then it is logical that the prices are high. Indeed, the costs for certification and organic feed are very high. Only if the production and the economies of scale will be improved, the prices will drop so as to see this price difference transferred to the shelf for the consumer and, in turn, an increase of the consumer demand.

Technical innovations and diversification

At the moment there are few organic seafood producers and there is lack of organic products. However, as technology is improving in fish production and processing, there are opportunities for new species/products/packaging (e.g., fillet, smocked, with a sauce, etc.).

Allowing organic aquaculture/fisheries in offshore wind parks could help to quickly increase the share of (organic) aquaculture in the EU. Recirculating Aquaculture Systems (RAS), which are currently excluded from the scope of EU organic regulation, would help production grow. Although, allowing RAS could prove to be a double-edged sword due to increasing consumer concerns (especially younger generations) regarding sustainability.

Also, there is a big potential of IMTA as a sustainable system to produce aquaculture. However, there are practically no seafood products commercially available originating IMTA. More research and proof of concept, that IMTA can be economically successful, is needed.

Technical/regulatory barriers

The industry needs to watch its environmental footprint, develop models that reduce and replace animal proteins with alternative sources, or it will be wiped out. We need protein from substitute sources, such as insects or plant-based proteins that are very compatible with the natural diet of several fish species. But we need much more clear and smarter regulations and frameworks. EU organic regulation is too complex and bureaucratic. Optimal solution would be to change regulation framework (smart regulatory framework) and support organic aquaculture making organic aquaculture less expensive (e.g., smart taxes).

Boosting organic food in out-of-home catering

Out-of-home catering accounts for a significant proportion of household food consumption, therefore, including more organic products in these sectors would be a major lever for organic development. Communication/campaigns about out of home catering based on organic seafood would be a great lever too.

Enhance the budget for public procurement in a way that allows for better access to organic seafood by citizens would shows true political interest in leading the development towards a organic food system.

ORGANIC TARGETS 4EU

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