



## Growing organic farming: drivers and barriers

### Introduction

Organic farming is an established part of European agriculture, providing a comprehensive approach that offers practical solutions to numerous EU-wide environmental and socio-economic challenges. It addresses key issues such as soil degradation, biodiversity loss, and climate pressures. By delivering on numerous EU environmental, health, and rural development policy objectives, it contributes to meeting public expectations on sustainable and trustworthy European food.

In 2024, 11.1% of EU agricultural land was managed organically. Although reflecting steady growth, the European Union remains still far from its target to reach 25% of agricultural land managed organically by 2030. Member States vary in their degrees of progress due to context-specific challenges in policy, market, or community. Key challenges such as market fragmentation, limited advisory capacities, or insufficient policy commitment, among others, limit the sector's ability to expand in line with EU ambitions.

This policy brief highlights the key factors driving or constraining organic sector development. By identifying priority areas for actions, it provides the EU and its Member States with evidence on the favourable conditions and levers for advancing towards the 25% target in a meaningful, balanced, and sustainable way.

### Key findings

Organic sector development is affected by various drivers and barriers (system lock-ins) rather than singular factors driving the development of organic production and consumption. Sector

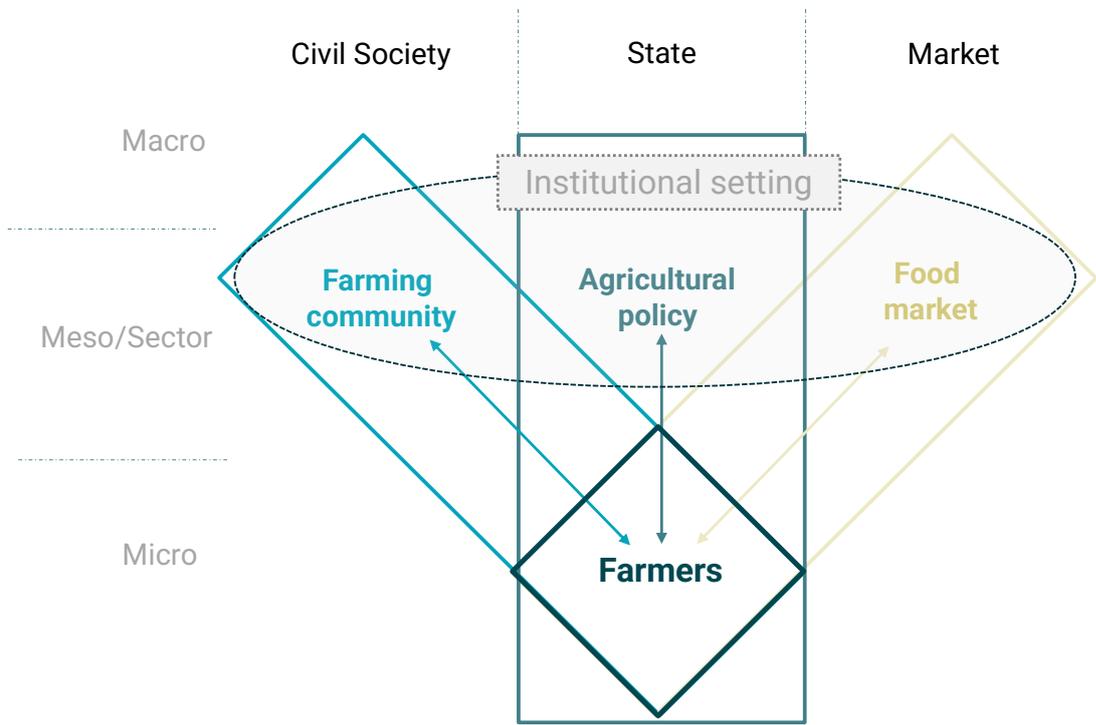
### Summary

- This policy brief outlines key factors shaping organic sector development in EU Member States.
- Long-term political commitment, targeted market development, and strong knowledge and innovation systems are essential for sustained growth.
- Priority actions to support the sustainable development of the organic sector mix supply-driven strategies with demand-side measures such as market support, diversified retail channels, or public procurement.
- A coherent long-term system approach links policy commitment, strong knowledge systems, and targeted market development to increase both supply and demand for organic products.
- Drawing on the system perspective in this brief, subsequent OrganicTarget4EU policy briefs provide further insight on specific levers for organic sector development.

development depends on how well policy, markets, *and* the farming community work together. Although national contexts differ, progress is strongest where all domains form a coherent, mutually reinforcing system. Organic expansion requires active market and value-chain development, supportive policy frameworks, and well-established institutions in the farming community and AKIS.

**System thinking for addressing interdependencies in organic development**

From a systems perspective, decisions are shaped not only by economic incentives, regulatory, or support frameworks but also by peer networks, advisory structures, social norms, and perceptions. Figure 1 illustrates this systemic interdependence: Farmers operate at the nexus of the agricultural community, agricultural policy, and the food market.



*Figure 1 Key components of a systemic approach to the organic sector*

The desire of individual farmers to change their farming practice may be fuelled by a range of disruptive factors, including technical or financial difficulties on the farm, health concerns, or external, e.g., economic, pressures (input prices, market conditions) or environmental factors such as pest and disease pressures or climate change (drought, changed production conditions).

Progress is not achieved through isolated actions, however. Coordinated improvements across all domains are needed. Such a food-system approach also builds alliances with civil society and public actors in related policy areas such as health or education. This strengthens acceptance and creates synergies for sustained development. Looking at sub-system dynamics, the key take aways are:

**Policy commitment and continuity are decisive**

Commitment to and continuity of support by policymakers are key for organic sector development. Policy commitment is expressed in clear long-term objectives supported by well-funded and stable policy instruments. Support focused mainly on area payments may not create stable market demand. Countries with well-established organic sectors use a mix of supply-push and demand-pull instruments across the value chain, including support for promotion, marketing and processing.



### Diverse market channels drive demand

Markets develop best when multiple sales channels operate in parallel. In several EU countries, organic growth has expanded beyond specialised shops to supermarkets, discounters, short food supply chains, and out-of-home catering, improving consumer access and market resilience.

### Civil society amplifies legitimacy, awareness, and demand

In countries with advanced organic sectors, civil society, NGOs, and public authorities play a key role in boosting demand. Through public procurement, awareness-raising, and clear communication, they link organic farming to health and sustainability. Ongoing communication, cooperation, and trust-building strengthen acceptance across the value chain boosting consumption

### A strong AKIS for organic reduces risk and enables innovation

Reliable information is essential, especially for farmers. AKIS forms a central component in supporting the farming community, linking organic actors—advisory services, training, and research—to both public institutions and market actors. A well-established and visible organic AKIS relies on cooperation between advisory services, training and education providers with organic bodies to effectively link science and practice. Where sustained funding, targeted training, or opportunities for organic research and exchange are lacking, farmers face higher risks, and development slows.

### Social norms and peer influence matter

Farmers' conversion decisions are shaped by social factors such as perceived feasibility, perceived risk, and peer influence. Whether organic farming is seen as an appropriate way forward requires confidence in that it is a technically and financially feasible approach, which is strongly influenced by policy or market drivers (support payments, premium prices). However, beyond financial incentives, ideas of "good farming", consumer expectations, access to information and advice (including from peers), social attitudes, and peer pressure all influence risk perception.

### Conventional-sector pressures influence decisions

Developments in conventional agriculture strongly affect the organic sector. Organic farming provides opportunities to deliver environmental sustainability, animal welfare, and other public goods. For individual farms, economic pressures and shocks in conventional supply chains—such as the cost-price squeeze—often lead farmers to view organic farming as a more resilient or meaningful alternative.

## Policy recommendations

From a food-system perspective, a well-functioning organic sector requires coordinated action across policy, markets, and knowledge systems. With a coherent, long-term systems approach, policymakers can ensure stable conditions for growth that reinforce policy frameworks, strengthen organic AKIS, and support market development:

### Build integrated, long-term organic strategies with clear milestones and resources (see also Policy Briefs #3 Targets, #5 Support Payments, and #13 Organic Action Plans)

- Position organic as key response to socio-political challenges reflected consistently across **EU** strategies and regulations, including EU-level guidance and **organic action plans**.
- Coordinate integrated strategies across ministries with clear targets, milestones, and multi-year budgets to anchor organic as a priority for **national** environmental, health, and rural development policies.
- National action plans are stronger where built on strong **civil society** support for organic as well as evidence and stakeholder perspectives.



## Strengthen AKIS for organic to reduce risks and support innovation

(see also Policy Brief #8 AKIS)

- Coherent **EU-level** AKIS support provides dedicated funding and stable institutional structures for participatory research, advisory services, training, and farmer-led innovation.
- **Member States** need to integrate organic permanently into vocational training and advisory systems, expanding peer learning, on-farm trials, and demonstration activities.
- Prioritise support for farmer knowledge exchange and **community-based advisory** structures to ensure that knowledge reaches farmers, processors, and other actors effectively.

## Develop markets strategically to stabilise demand and diversify access

(see also Policy Briefs #6 Supply chain development, #7 Consumer demand).

- Provide **EU level** policy support for organic processing, distribution, and retail structures, while strengthening guidance on green public procurement for predictable demand.
- Expand processing capacity, regional distribution, and diversified retail channels in **Member States** with national public procurement targets for consistent demand and **consumer** access.
- Support **societal** diversification initiatives that strengthen short supply chains, community-based food initiatives, or transparent communication on organic products. Raise awareness and reinforce consumer trust for stabilised demand.

## Strengthen communication, legitimacy, and transparency to build trust in organic

(see Policy brief #7 Consumer demand)

- Simplified and clear **EU** certification rules and EU-wide communication and coordination structures help present organic as a credible and effective policy instrument.
- Strengthen **national-level** communication to promote a positive, solution-oriented narrative on organic highlighting the practical opportunities for farmers, processors, and retailers.
- Develop **community-level** communication and cross-sector alliances that embed organic in society and reinforce its legitimacy by providing independent, accessible information and guidance to value-chain actors.

## Further information

All OrganicTargets4EU deliverables: <https://orgprints.org/view/projects/OT4EU.html>.

All OrganicTargets4EU policy briefs: <https://organictargets.eu/policy-briefs/>.

Ingrid Jahrl and Sabine Reinecke, Research Institute of Organic Agriculture FiBL

January 2026

OrganicTargets4EU is funded by the European Union (Grant no. 101060368) and by the Swiss State Secretariat for Education, Research and Innovation (SERI) (Grant no. 22.00155). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union, European Research Executive Agency (REA) or Swiss State Secretariat for Education, Research and Innovation (SERI). Neither the European Union nor any other granting authority can be held responsible for them.



Funded by the  
European Union



Schweizerische Eidgenossenschaft  
Confédération suisse  
Confederazione Svizzera  
Confederaziun svizra

Swiss Confederation