



Getting to 25% organic: alternative routes and options

Introduction

The European Union is committed to a food system that is healthier, more resilient and less dependent on synthetic inputs. Organic farming is one of the few tools that can deliver multiple objectives at once: lower pesticide and nutrient losses, better soil and biodiversity outcomes, and stronger rural value chains. These are important contributions for policymakers concerned with strengthening rural economies, reducing environmental impacts, and keeping EU food systems competitive in a world of input shocks.

Achieving the Farm to Fork target of 25% of EU farmland managed organically by 2030 is about making the transition manageable: balanced supply and demand, enough advisory capacity, and value chains ready to absorb growth. There are different routes that can be taken to get there, whether more environment or market focused.

Achieving the target by whichever route requires a coordinated package that aligns CAP incentives, market development, knowledge systems (AKIS), and demand-side instruments such as public procurement.

Key issues

- Without stable demand signals and investment in advice and value chains, conversion slows, and the sector risks boom-bust cycles.
- Organic supports public goods delivery (climate, biodiversity, pesticide reduction, water security), while contributing to rural employment, value addition, and resilience to input shocks.

Summary

- The Farm to Fork objective of 25% organic land by 2030 can be pursued through different growth pathways shaped by policy support, market pull, and citizen action.
- OrganicTargets4EU combines EU-level scenarios with participatory national backcasting to translate the ambition into sequenced actions and identify levers that work across futures.
- Organic is a policy instrument delivering multiple public goods—climate mitigation and adaptation, biodiversity, soil and water protection, reduced pesticide exposure, nutrition and health, animal welfare and resilient rural economies—but only if supply, demand, and value chains scale together.
- A managed transition reduces the risk of unstable conversion patterns due to the lack of stable demand, uneven national performance and fragmented investment.

Headline policy recommendations:

- **Move from “targets” to “delivery”:** deploy an EU–national **Organic Delivery Package** combining (1) **smart incentives** (CAP + state aid fit-for-purpose), (2) **market pull** (public procurement + value-chain development), and (3) **system enablers** (AKIS, advisory services, R&I, market intelligence/price transparency).
- **Coordinate and monitor:** create or strengthen **organic market observatories** and national **stakeholder platforms** to anticipate bottlenecks and align measures.
- **Use public procurement strategically:** set practical, measurable procurement pathways to stabilise demand and de-risk conversion.

- Organic growth must be managed as a transition—balanced supply and demand, affordable access, and credible monitoring—otherwise public support erodes.

Key findings

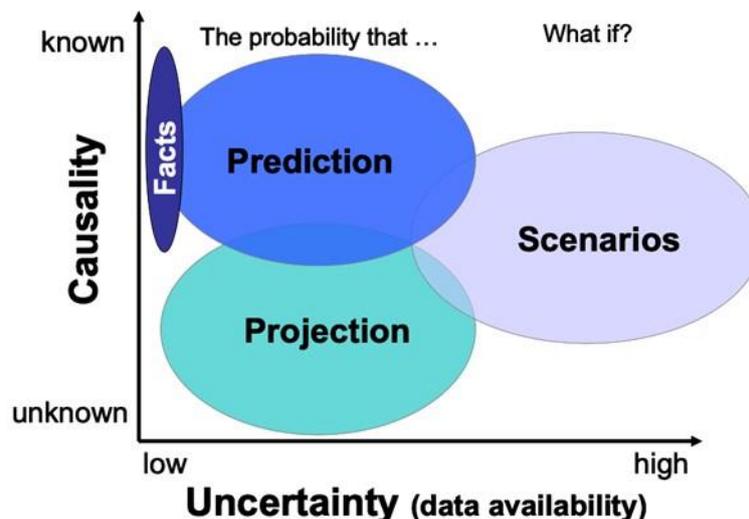
OrganicTargets4EU combined EU-level foresight scenarios with participatory national backcasting to test the feasibility of the 25% ambition under different futures. As illustrated in Figure 1, when uncertainty is high and causal relationships are less well established, scenario work (“what if?”) becomes more appropriate than prediction or simple projection based on available data.

The four scenarios developed and evaluated reflect different perspectives on the role of policy support and markets as drivers for organic growth. The Green Public Policy scenario reflects a strong environmental public policy-driven growth, with more growth on arable land. By contrast, the Organic on Every Table scenario assumes strong market engagement from retailers and public and private caterers, building on positive policy support, delivering market-led outcomes that would also favour more production of fruit and vegetables. In light of changing policy priorities in the last few years, the Divergent Pathways scenario reflects different priorities in different countries, with a mix of policy-driven, market-driven or non-interventionist approaches. An alternative Organic Power to the People scenario considers the possibility that organic growth might be driven by citizen action and less by commercial or state interests (see Zanoli et al. 2026 for more information).

Across scenarios—from strong public-policy push and citizen mobilisation to more market-driven or fragmented pathways—progress depends on whether policy aligns three systems at once: (1) CAP-linked incentives for conversion and maintenance, (2) demand and market organisation (including public procurement), and (3) knowledge and innovation systems (AKIS and R&I) that solve conversion bottlenecks. Backcasting shows that sequencing matters: early capacity building and market readiness reduce later instability.

- Robust policy levers across scenarios include stronger AKIS, targeted R&I and innovation uptake, market intelligence/price transparency, stakeholder coordination, and public procurement.
- National pathways differ depending on current national trends and most likely scenarios, but the bottlenecks repeat: advice capacity, value-chain readiness, and weak progress monitoring.
- Best policy hook: manage the transition with milestones to keep markets balanced and avoid boom-bust conversion cycles.

Figure 1. Scenarios as a foresight technique



Development needs and challenges, policy options

Backcasting highlights a practical challenge for policy implementation: current instruments often operate in silos. CAP support can increase organic area, but conversion slows when advisory services are overstretched, when processing and logistics are missing, or when retailers and public buyers do not provide stable demand. Likewise, demand-promotion can backfire if supply cannot respond, leading to imports, price spikes, and political backlash.

Three development needs stand out. First, stronger steering through milestones: progress tracking should combine hectares with market indicators (processing capacity, procurement volumes, price signals, AKIS capacity). Second, stronger knowledge capacity: AKIS must deliver practical support on conversion, resilience and value-chain adaptation. Third, stronger governance: organic growth depends on coordinated action across ministries, regions and private actors; ad-hoc coordination leaves gaps and slows delivery. These needs are not additional bureaucracy. They are the prerequisites for a managed transition that protects farmer confidence, stabilises markets, encourages investment, and maintains public trust.

Policy options (robust across scenarios)

The foresight analysis of OrganicTargets4EU identifies options that remain relevant across different futures. They work because they link supply, demand and knowledge, and they can be implemented within existing frameworks while building a pathway to 2030:

- Scale demand certainty via public procurement (schools, hospitals, public canteens) with clear criteria and multi-year purchasing commitments.
- Strengthen AKIS: Research & Innovation, advisory services, training and demonstration focused on conversion bottlenecks and resilience.

Why does this differ from 'more conversion payments'?

Because it treats organic growth as a managed transition: it makes demand visible, scales knowledge capacity early, and uses market indicators to change course before crises appear. Scenario and backcasting evidence suggest translating ambition and quantitative targets into sequencing and accountability—rather than hoping dispersed measures add up by 2030:

- Target R&I and innovation uptake (including processing and value-chain innovation) aligned with national needs.
- Improve market intelligence and price/volume transparency; use early-warning indicators to avoid boom-bust cycles of organic conversion without a stable demand growth.
- Build coordination platforms and a progress dashboard that links CAP implementation, organic action plans and market development.

Policy recommendations

Adopt a coordinated 'Organic Transition Package' delivering on multiple public goods with milestones to 2030

Create one joined-up package per Member State (e.g., in Organic Action Plans) that aligns CAP supports, market development, and knowledge actions, tracked with milestones (see also policy briefs #1 Drivers and #13 Action plans)

- **EU policymakers:** provide a common milestone framework (hectares + market indicators), develop incentives for public good delivery and enable peer learning between Member States.



- **National policymakers:** integrate milestones into CAP Strategic Plan implementation and organic action plans; assign clear governance and a single progress dashboard.
- **NGOs:** convene multi-actor coalitions, monitor delivery, and communicate progress in accessible narratives that sustain political commitment.

Make demand predictable: scale public procurement and mainstream channels

Use purchasing power and clear market signals to stabilise the transition and improve affordability (see also policy brief # 7 Consumer demand).

- **EU policymakers:** strengthen guidance and funding support for sustainable food procurement with organic sourcing criteria.
- **National policymakers:** set measurable procurement targets (schools, hospitals, public canteens) and use multi-year contracts to give suppliers confidence.
- **NGOs:** support implementation (training for procurers, model tenders) and connect organic to health and local value creation in public communication.

Strengthen AKIS and targeted R&I to remove conversion bottlenecks

Invest in advice, training, demonstration and innovation uptake so farms and value chains can convert and stay resilient (see also policy brief #8 AKIS).

- **EU policymakers:** prioritise organic-relevant advisory and innovation actions in Horizon Europe, EIP-AGRI, and knowledge networks.
- **National policymakers:** ring-fence funding for organic advisory services, training and demonstration farms, linked to identified national bottlenecks.
- **NGOs:** co-deliver peer learning and feed practitioner needs into research agendas and policy dialogues.

Build market transparency and risk management into organic growth

Use data and early-warning indicators to anticipate over- or undersupply, protect farm viability, and maintain public trust (see also policy briefs #6 Supply chains & #7 Consumer demand).

- **EU policymakers:** support EU-level market observatories and harmonised reporting on prices, volumes, and trade for organic products.
- **National policymakers:** publish market data, promote fair contracting practices including pluriannual tripartite contracts (farmers, processors, retailers), and use monitoring to adjust CAP implementation in real time.
- **NGOs:** share market intelligence with members, promote transparency across supply chains, and flag emerging risks early to policymakers.

Further information

Zanoli R. *et al.* (2026) *Scenarios for the development of the organic sector*. Deliverable D2.1 OrganicTargets4EU. IFOAM Organics Europe. <https://orgprints.org/id/eprint/56760>.

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