



## Achieving organic targets:

### Delivering for the economy and the environment

#### Introduction

Organic farming delivers on two main areas of EU policy: **environmental public goods** by adapting production practices and restricting certain inputs, and **economic and employment benefits** for rural areas through specialist organic markets.

In recognition, organic farming is supported in the EU by legal definition since 1992 and by area support for organic conversion and maintenance introduced as a CAP agri-environmental measure in 1994.

The 2020 Farm to Fork and Biodiversity Strategies set a range of ambitious environmental targets, including achieving 25% of the EU agricultural area managed organically, and a significant increase in organic aquaculture, by 2030.

Supported by the 2021 EU Organic action plan, the targets and policy goals were integrated into Member State CAP Strategic Plans for 2023-2027 and national organic action plans covering periods up to 2030.

In the current CAP, 5% of total financial resources (20% of environmental funds) are budgeted to provide support for organic conversion and maintenance to reach 10% of EU agricultural area (UAA) under organic by 2027. As not all organic land is supported, this is likely to be equivalent to about 15% of UAA certified as organic or in-conversion.

The CAP and national organic action plans implemented in almost all EU member states represent a material enhancement of organic policy ambition in the EU from 2023. If successful, EU organic farming could grow by 10 Mha, up from 15 Mha or 9% of UAA in 2020. This is still some way from achieving the EU's 25% target, or Member States' organic action plan targets averaging 18%, by 2030, indicating that further policy actions are required to deliver the ambition.

#### Summary

The EU has set ambitious targets for organic farming to reach 25% of its agricultural area by 2030 and for a significant increase in organic aquaculture.

Progress towards the target is steady, with the organic land area share increasing from 9% in 2020 towards 12% in 2025, but the target of 25% is not likely to be achieved—15%-18% by 2030 is more likely, 25% by 2035 is conceivable.

Achieving the targets would have significant impacts on organic production, rural economy, and the environment, benefiting European citizens, not just organic consumers.

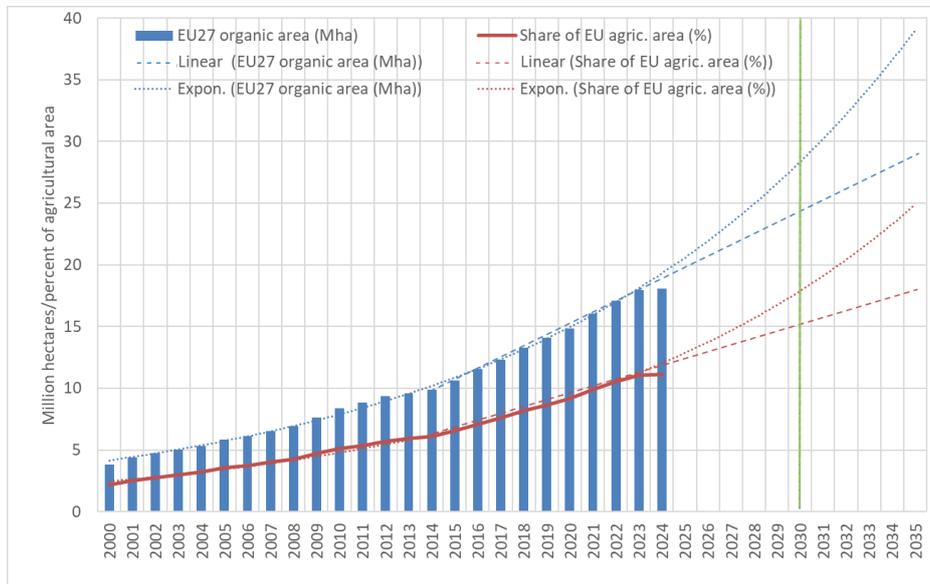
Growth in market and land area share has, however, stalled in many countries following the pandemic and the war in Ukraine. Putting the organic sector back on a recovery path is a key policy priority.

The 2028-2034 CAP provides an opportunity to implement coherent policies to support transformative organic sector growth.

Continued commitment to appropriate land area and market shares and environmental targets is critical for this process.

## Key findings

The OrganicTargets4EU project tracked the development of organic farming in the EU and its member states since the 1980s<sup>1</sup>. Since 2000, the organic land area has doubled every ten years, while the market trebled.



**Growth of certified organic and in-conversion land area (Mha) and share (%) of utilisable agricultural area (UAA) in the European Union, 2000-2024** (Source: data from FIBL Statistics)

A continuation of these growth trends would imply 18% UAA organic by 2030, and 25% by 2035. A more modest linear projection based on the last CAP 2014-2022 would reach 15% by 2030. Trend impact analysis underpinning the scenarios analysed in the project and a logistic growth curve model used for CAPRI modelling yielded similar results. These do not, however, account for the impacts of increased emphasis on organic farming policy in the CAP Strategic Plans and national organic action plans from 2023, which could drive faster growth. The projections are complicated by a slowdown in organic market growth in 2022-23, due to a combination of the Covid pandemic and the food price inflation following the war in Ukraine. Although 2023 and 2024 data show clear signs of the organic market growing again, a slowdown in new conversions and reversions to conventional production in some countries have impacted on the land area growth rates in 2024. Data for 2025 are not yet available.

The response varied by country. Several with long-established organic markets such as France, Germany, Austria, Sweden, and Denmark have experienced slow growth or small declines in sales and certified organic land area. Others such as Bulgaria, Ireland, Greece, Portugal, and Romania have seen much more rapid growth. Typically, these countries build from a lower starting point with more generous support programmes introduced or are focused on exports with less domestic sales.

### Impacts of achieving the 25% UAA organic target

Modelling work in the project looked at EU-wide impacts using the CAPRI tool and specific sector impacts in individual countries using an impact-output simulation tool developed by IDDRI. These considered different scenarios for EU organic policy and market development to 2030.

<sup>1</sup> For more details, see the World of Organic Agriculture reports <https://statistics.fibl.org/index.html> and the OrganicTargets4EU national organic sector factsheets <https://organictargets.eu/organic-sector-factsheets/>.

The CAPRI modelling found that while overall output and incomes would decline, income reductions could be covered by organic support payments and premium prices—it was not possible to model the organic market specifically using this tool. The CAPRI modelling also identified good potential for environmental impacts, thanks to reduced nitrogen fertiliser and pesticide use, reduced greenhouse gas emissions, and more biodiversity-friendly farming practices

The IDDRI modelling identified potential for rural employment and incomes to be increased, but it was unlikely that the organic sector would be immune to general trends towards larger farm sizes.

## Targets and policy challenges

Given the uncertainty over whether EU's targets can be achieved, it is tempting to conclude that they have failed and are therefore valueless. This would be a mistake, for several reasons:

- The latest data available EU wide relate to 2024. There are still six years to go until 2030 with higher support payments planned in some countries and a new CAP programming period with refreshed EU and national organic action plans to come.
- Aspirational targets, even if not achievable, have an important signposting role, as can be seen from the current CAP Strategic Plans and MS national targets. The EU targets and organic action plan were important motivators for some governments to introduce or significantly increase policy support for organic farming and to set their own ambitious targets.
- Realistic targets are important to ensure resources are available to meet demand and to evaluate progress. For the first time, the national CAP Strategic Plans for all EU member states have included budgeted plans for organic expansion. Clear targets and policy support commitments also provide a strong signal to market actors to invest in the organic sector.
- Land area targets alone may not be sufficient. Environmental and market targets could help keep the focus on core policy impacts, as recommended by the European Court of Auditors. Crop diversity, stocking rate and input use indicators could be used as proxies for measuring environmental outcomes directly. Market targets could include shares of retail sales, exports, and public procurement or out-of-home catering.
- In the absence of targets, there is no basis for the evaluation of achievements and policy modifications to address shortfalls or unintended consequences. The recent dropping of targets in Sweden and France, the two countries with declining organic sectors, may further increase the lack of confidence among farmers and market actors to engage with organic.

Previous research on organic action plans has highlighted the importance of targets in setting a context for the actions to be developed and their contribution to organic sector development (growth, competitiveness, and sustainability) (see Policy Brief #13 Organic action plans).

## Policy recommendations

Despite the recent challenges, there is still scope for policy to influence recovery and future development, delivering economic and environmental benefits. We recommend the EU Commission should:

**Provide strong encouragement and guidance to national governments to a) continue with and enhance organic support in the 2023-2027 CAP Strategic Plans, b) address the recent slowdown in market growth and conversion rates and c) prepare ambitious plans for the transformative development of the sector in the 2028-2034 programming period, by:**

- Requesting member states to report soon on plans to upgrade their organic policy measures for 2026-27 to address the slowdown in growth that has been experienced in many countries.
- Maintaining the commitment to 25% of EU agricultural area organic, but by 2035 not 2030.
- Preparing an updated EU-level organic action plan as a basis for providing guidance to national governments as well as supporting mechanisms for sharing best practice in organic policymaking, utilising the EU CAP Network where appropriate.
- Using the recommendations in the OrganicTargets4EU policy briefs as a basis for specific guidance and recommendations to Member States on different policy options and their integration in revised national organic action plans for 2028-2034.

**Encourage national governments to continue to set meaningful land area, environmental, and market targets for the development of organic food and farming by 2035, which:**

- Define clear policy ambition and direction, informed by stakeholders,
- Recognise the contribution that organic food and farming can make to broader policy goals,
- Are integrated in future CAP plans, organic action plans and other strategies,
- Relate appropriately to production, markets, and environment,
- Are resourced adequately to achieve delivery in relevant timescales,
- Are owned by appropriate agencies to ensure delivery,
- Are monitored and evaluated to ensure the effectiveness of policy implementation, supported by improvements in statistical data collection and reporting (see policy brief #10).

### Further information

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