



**TRANSFORMATION SCENARIOS FOR BOOSTING  
ORGANIC FARMING AND ORGANIC AQUACULTURE  
TOWARDS THE FARM-TO-FORK TARGETS**

## **Deliverable D7.1**

# **Policy recommendations for the delivery of the organic Farm to Fork Strategy targets by 2030 and beyond**

Document/report - Public

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## Executive summary

The OrganicTargets4EU project supports the EU Farm to Fork and Biodiversity Strategies' aim to reach 25% of agricultural land (UAA) under organic farming and a significant increase in organic aquaculture by 2030. Over 3.5 years, the project covered an analysis of drivers and barriers of organic sector development, including current policy support for organic farming and aquaculture (WP1), the developing of different future scenarios and national pathways for reaching the organic targets (WP2), and an assessment of the impacts the possible future scenarios for the organic markets and production (WP3 and WP4) and for knowledge and innovation (WP5 and WP6).

This report on policy challenges and options to deliver organic F2F targets by 2030 presents the results of Work Package 7, which aimed to review outcomes of previous work packages to identify and assess the relevance policy gaps and priorities for action, explore the likelihood of achieving organic F2F targets and under what conditions, and define relevant policies to be implemented in 2025-2030 and beyond.

### Chapter 1 Introduction

Under the approach of this policy work, all project outcomes were reviewed to identify policy gaps and challenges, explore options, and define policies that can support the sustainable growth of the organic sector and deliver the organic target of 25% land area by 2030.

The historic, current, and likely future policy environments for the sector were considered, such as support for organic conversion and maintenance since 1994 (Regulation (EEC) 2078/92), the EU organic regulation (EEC 2092/91), three European Organic Action Plans (2004, 2014 and 2021), and the EU Green Deal with its Farm to Fork and Biodiversity strategies. In the CAP period 2023-2027, Member States developed organic support in their National Strategic Plans as well as in National Organic Action Plans. Of relevance are also the 2025 proposals for the multi-annual financial framework (MFF) 2028-2034 and for a future CAP with the new National and Regional Partnership Plans (NRPP).

Project results were summarised for discussion at national workshops in nine key themes related to agriculture: organic production support payments, supply chain development, consumer demand, advice and mentoring, training and education, research and innovation, statistics and market data, capacity development, and organic action plans. National workshops were organised by the practice partners in seven countries (AT, DE, DK, FR, HU, IT, RO). Aquaculture was treated as a separate theme, and one transnational workshop was held online. They were attended in total by 117 participants (48% women), including policymakers, representatives of organic and other farming organisations, and actors from food businesses, knowledge, research, and environmental and other relevant interest groups. The workshops followed common guidelines, and participants were encouraged to discuss a set of questions on each of the key themes. Policy themes and preliminary recommendations were also discussed with staff of the EU Commission, at the Danish Organic summit in August 2025, and a world café session during the final conference of OrganicTargets4EU in November 2025, organised jointly with the Organic Innovation Days.

In nine thematic chapters, the report covers the specific policy context, project outcomes, other relevant literature for each key theme, and outcomes of the discussion and suggestions for policy recommendations from the national workshops, conference debates, and European perspectives. Each chapter also includes policy recommendations which were used as the basis for 9 policy briefs related to the themes, part of the total 12 policy briefs of the project (3 address project outcomes for policy context) (see: <https://organictargets.eu/policy-briefs/>).

## Chapter 2 Organic sector development and targets

Drawing on statistical data from FiBL and Eurostat, historic growth trends for organic land area and for the market were reviewed for the EU. Trends for some Member States show variability ranging from stagnation or even decline (e.g., France and Sweden), while other countries have experienced faster growth in the last few years, such as Bulgaria, Greece, Ireland, and Portugal. A longer-term perspective of individual countries shows periods of rapid growth followed by slower periods and then renewed rapid growth. This makes it difficult to predict likely future growth for any country or for the EU.

There is a need to **focus on integrated long-term strategies for reaching ambitious targets**. Ambitious targets have a strong sign-posting and motivational role, and the 25% target has clearly had very positive impact on the sector development in the 2023-2027 CAP. However, targets should also be realistic, achievable, and adequately resourced. Our work shows that good progress is being made towards the 25% target and that 15-18% is achievable by 2030; 25% may take 5-10 years longer to achieve.

## Chapter 3 Organic Area payments

Support for conversion to and maintenance of organic production practices was first introduced as part of the agri-environmental measures in the 1994-1999 CAP (Reg. 2078/92). The project results focus on the current CAP period (2023-2027) and show a high degree of variability between Member States. For maintenance, some Member States chose Pillar 1 eco-schemes which are 100% EU-financed, whilst others continued with established Pillar 2 schemes involving national co-financing. There is a need to review the basis for setting organic conversion and maintenance payment rates so that they reflect environmental outcomes, integrate well with other environmental schemes, and consider the financial situation of organic farmers including from entrepreneurial and marketing activities.

The main recommendation is to **make organic area support an environmental priority for all in the CAP**. The EU Commission can provide encouragement and guidance to national governments to continue with and enhance organic support in the 2023-2027 CAP Strategic Plans, adapting payments to strengthen the organic sector, especially in countries that experienced slowdown following the pandemic and the war in Ukraine. Further development should focus on rewarding environmental outcomes, whilst considering impacts on the organic market and supporting the next generation of farmers to go organic. Member States should prepare ambitious plans for the transformative development of the sector in the 2028-2034 programming period.

## Chapter 4 Organic Supply Chains

Organic supply chains cover all stages from input suppliers to consumers and include alternative marketing channels. They have been an important driver of sector development and involve many different types of businesses. More recently, catering has begun to play an important role.

The project considered recent trends, including the disruptions of market growth from the pandemic and inflation pressures. Core themes that support market development are identified as consumer awareness, affordability and availability of organic products, product innovation, improved logistics and coordination in processing, and strategies for organic products in public procurement and catering. A clear need to strengthen supply chain co-ordination and networking, both horizontally through producer organisations and vertically, was recognised. Broadening the marketing channels that producers can access is also important and varies for different sectors. However, the organic market was created to support organic producers who were developing less input-intensive and less environmentally harmful production systems to remain financially viable, particularly in the absence of direct policy support. Policies designed to support the development of the organic market should be compatible with environmental support initiatives and align with consumer demand.

The main highlight is the importance of **strategic development of organic supply chains and a diverse range of marketing channels reaching a wide range of consumers and citizens**. This includes investment support, strengthening the transparency and efficiency of organic supply chains for quality, exploiting public procurement to grow demand for organic food and citizen engagement, encouraging regional marketing, short supply chains, and bio-districts, more directly linking producers and consumers, and improving the availability and quality of organic market information and data.

### Chapter 5 Consumer demand and promotion

Consumers value many benefits of organic, including protecting biodiversity and the environment, but mainly for its health benefits, including reducing exposure to harmful chemicals. Reaching 25% of agricultural land under organic requires not only expanding organic production but also stimulating consumer demand for organic. The development of production and consumer demand do not always go hand in hand. In the EU, organic products are identified through the Euroleaf organic logo alongside national and private organic labels.

The project identified availability of organic products as one of the main factors that can influence consumer demand, alongside the need for better labelling and communication of organic attributes and benefits of production alongside the need to reduce other confusing and unfounded green claims.

**Organic should become the easy default choice for everyday shopping for consumers—visible, trusted, and affordable.** Supporting the development of organic processing and marketing infrastructure can strengthen transparency and efficiency. Public procurement can help grow the demand for organic food through citizen engagement.

### Chapter 6 AKIS: Advice, mentoring, education, and training

Achieving ambitious goals for organic farming requires an easily accessible organic knowledge and innovation system. Organic agriculture reduces physical inputs that are replaced with knowledge, making a functioning information and knowledge system particularly important.

The project results confirm that advisory services for organic are often fragmented, using short-term and project-based funding, leaving farmers without stable access to support during conversion and later farm development. The primary development requirement is to establish advice, training, and education in organic farming as a clearly defined, resourced, and specialised component of AKIS, rather than presuming that generic systems will adequately address organic requirements. Advisory content focuses mostly on production and compliance, but does not adequately cover conversion issues, accessing markets, finances, climate resilience, soil and water management, digital tools, and supply-chain development.

The main conclusion is the need for **strengthening organic in AKIS, for better advice, training, and knowledge exchange**. Organic farming should become a fully integrated, sustainably funded part of national AKIS, ensuring access to high-quality, specialised advice and knowledge exchange for all relevant stakeholders. Member States should strengthen AKIS for organic, to reduce risks and support innovation making use of CAP instruments, recognising the important role that organic organisations play. The aim should be easy access to advice on organic for farmers, training for advisors and value chain actors, and building peer-to-peer networks, cross border exchanges, and digital knowledge hubs.

### Chapter 7 Research and innovation

Research is highly important to enable the further development of organic systems and innovative practices, improving technical, environmental, financial, and social performance. By reducing dependence on external inputs, strengthening local value chains and regenerating natural capital, organic R&I helps keeping farms profitable and rural regions vibrant. Solutions created can and are being taken up by the whole of agriculture, for example in soil fertility management and weed, pest, and

disease control. The results highlighted the potential risk that funding is diverted away from organic sector specific needs to broader sustainability and agroecology themes.

There is a need for **investing in organic research and innovation specific to the organic sector**. EU and national research funders should ringfence budgets for research and innovation specific to organic sector needs and proportional to growth targets and develop specific capacity for knowledge sharing. This is a strategic investment supporting the transition of Europe's agri-food systems and delivering solutions to improve farm profitability, reduce input dependency, regenerate natural capital, and develop value chains.

### **Chapter 8 Statistics and market data**

Good quality data and statistics, taken for granted in agriculture in general, are lacking for organic food and farming in many contexts. Such data are needed for decision-making on production, investments and marketing, by businesses at all levels of the supply chain, from farmers to retailers. Statistics are also needed by policymakers for policy implementation and evaluation, and by researcher for monitoring, modelling, and impact assessment. The project identified available data sources and potential gaps and concluded that there is need for significant improvement in data availability, quality, and timeliness. Some issues related to SAIO implementation were also identified.

**Statistics and market data are critical for supporting growth.** With the organic sector approaching 20-25% of EU agriculture in the foreseeable future, there should be an organic equivalent for all agricultural and food statistics. The recommendation is adjusting the legal framework to improve organic data collection and reporting and to make use of opportunities through digitalisation with appropriate governance and data protection to improve data sharing between operators, public authorities, and organic control bodies.

### **Chapter 9 Aquaculture**

The European Commission has included a significant increase in organic aquaculture in the organic target for 2030 and encouraged Member States to include the development of organic aquaculture in the Multi-annual National Strategic Plans (NSPAs) for sustainable aquaculture 2021-2030. Research literature on aquaculture pays only limited attention to organic production systems.

Many parts of the project focus also on organic aquaculture, often requiring separate assessment to address its unique circumstances. This included a quantitative systematic literature review focusing on Atlantic salmon, rainbow trout, common carp, European sea bass, gilthead sea bream, and shellfish. The aim was identifying and analysing the factors that either constrain or support the development of European organic aquaculture, including technical, business, and policy issues. Constraining factors are described in relation to policy support, supply chain development, consumer demand, knowledge and innovation systems, and research. The results of this project provide a first detailed assessment of the state of European organic aquaculture (see Toomey et al., 2025),

The main recommendation is **the need for strengthening organic aquaculture in Europe**. Organic aquaculture is still at an early stage of development in many countries, and its situation is fragile. Support for organic aquaculture should be developed to a similar status and importance for EU sustainability outcomes as organic farming. For this, similar instruments are needed, including regulatory adaptation and support for aquaculture producers, supply chain development, consumer information, and investment in research, advice, and knowledge exchange.

### **Chapter 10 Organic action plans, capacity building, and bio-districts**

Organic farming pursues multiple goals with a systems approach, covering public and private goods. Policy various measures to support sector development with many different interventions, which can make policymaking difficult. The dual societal role of organic farming providing for a specific market



responding to consumer demand for organic products and delivering publicly goods that contribute to the protection of the environment, animal welfare, and rural development, highlighted in the EU Organic Regulation (EC/2018/884) and the first EU Organic Action Plan of 2004, requires co-ordination between units with sometimes dissimilar aims.

The project reviewed the European and national organic action plans and compared policy areas covered. The results show that good quality organic action plans have significant potential to improve policy integration and coherence, but there is considerable variation in quality and performance between Member States, and room for improvements in design, scope, and implementation. Stakeholder engagement emerges as an important factor, as does evaluation, current assessment of sector needs and sufficient resources to implement the actions.

A well-functioning organic sector requires coordinated action involving direct support, markets, and knowledge systems. Organic action plans (OAPs) have the potential to integrate public good and market-oriented, supply-push and demand-pull policies, and ensure coherence with broader policy frameworks. This needs to be supported by effective targets, stakeholder engagement, clearly defined development needs, as well as dedicated resources and co-ordination capacity. A broad range of production, market and information, as well as capacity building measures can be included.

**To continue supporting the development of the organic sector, policymakers at the EU and Member State level should focus on integrated, long-term strategies with clear milestones and resources, such as organic action plans.** These should integrate public and market goods policies, supply-push and demand-pull policies, and ensure coherence with broader policy frameworks.

### **Chapter 11 Conclusions**

The final chapter presents conclusions of the key themes for policymakers. It recaps how the Commission's Vision for Agriculture and Food and the Multi-annual financial framework (MFF) published in 2025, including the proposals for a post-2027 CAP and the new National and Regional Partnership Plans (NRPP), provide many opportunities to use the policy recommendations provided by the project for the dynamic development of the organic sector.

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## Declaration

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All AI-generated content was reviewed and edited by the authors, who accept full responsibility for the final text.

## Abbreviations

AAC—Aquacultural Advisory Council  
AB—French organic logo  
AECM—Agri-environment-climate Measures  
AG—short for German “Arbeitsgemeinschaft” [Working group]  
AKIS—Agricultural Knowledge and Innovation System  
ASC—Aquaculture Stewardship Council  
AUTH—Aristotle University of Thessaloniki  
B2B—Business to business  
BAU—Business as usual scenario  
Biokultúra—Hungarian Association of Organic Farmers  
BOKU—University of Natural Resources and Life Sciences, Vienna [Austria]  
BÖL(N)—Federal Programme for organic farming [Germany]  
BÖLW—Bund Ökologische Lebensmittelwirtschaft [Germany]  
BRREA—Brevet professionnel responsable d'entreprise agricole [France]  
CAGR—Compound Annual Growth Rate  
CAP—Common Agricultural Policy  
CAP SP—Common Agricultural Policy Strategic Plan  
CAPRI- Common Agricultural Policy Regionalised Impact modelling system  
CASDAR—Public fund by the Ministry of Agriculture in France  
Certcost—Economics Analysis of Certification Systems in Organic Food and Farming [EU project]  
CFP—Common Fishery Policy  
CICHEAM—International Centre for Advanced Mediterranean Agronomic Studies  
CLLD Community-Led Local Development  
CMO—Central Market  
CoP—Communities of practice  
COOP—Cooperation [CAP intervention]  
CPD—Continuous Professional Development  
CSAB—Organic Agriculture Scientific National Committee  
DABIS—Degressive Area-Based Income Support [CAP]  
DBV—Deutscher Bauernverband  
DG AGRI—Directorate General for Agriculture and Rural Development [EU-Commission]  
DG MARE—Directorate General for Maritime Affairs and Fisheries [EU Commission]  
DPW—Divergent Path Ways scenario  
ECA—European Court of Auditors  
ECF—European Competitiveness Fund  
ECU—European Currency Unit  
EEA—European Environment Agency  
EEC—European Economic Community  
EGAlim—Agriculture and Food Law issued by the «Etats Généraux de l'Alimentation» [France]  
EIP-AGRI—European Innovation Partnership for Agricultural Productivity and Sustainability  
EISfOM—European Information System for Organic Markets [EU project]  
ELGO DIMITRA—Hellenic Agricultural Organisation  
EMFAF—European Maritime, Fisheries and Aquaculture Fund  
EMFF—European Maritime, Fisheries Fund  
EQIP-OI- Environmental Quality Incentives Program Organic Initiative  
ERA—European Research Area  
EU—European Union

EUCEE0FP EU—Further Development of Organic Farming Policy in Europe, With Particular Emphasis on EU Enlargement [EU project]  
FAS—Farm Advisory Services [CAP]  
F2F—Farm to Fork Strategy  
FADN—Farm Accountancy Data Network [now FSDN]  
FAO—Food and Agriculture Organisation  
FCR—Feed Conversion Ratio  
Federbio—Federazione Italiana Agricoltura Biologica e Biodinamica (Italian Federation for Organic and Biodynamic Agriculture)  
FEAP—Federation of European Aquaculture Producers  
FiBL—Forschungsinstitut für biologischen Landbau [Research Institute of Organic Agriculture]  
FNAB—Federation National d’Agriculture Biologique  
FSDN—Farm Sustainability Data Network [previously FADN]  
FSS—Farm Structure Survey  
GDP—Gross Domestic Product  
GIS—Groupement d’Intérêt Scientifique  
GMO—genetically modified organism  
GPP—Green Public Policy scenario  
GUDP—Green Development and Demonstration Programme [Denmark]  
HAPO—Hellenic Aquaculture Producers Association  
HBLFA— Higher Federal Teaching and Research Institutes for Agriculture [Austria]  
HMCR -Hellenic Centre for Marine Research  
HNT—Hegyközségek Nemzeti Tanácsa  
HORECA- Hotel, Restaurant, and Café/Catering  
HVE- High Environmental Value  
IACS—Integrated Administrative and Control System  
ICOEL—Danish Innovation Centre for Organic Farming  
ICROFS—Danish Coordinating Body of the National Research Programmes concerning organic farming and food systems  
IDDRI—Institut Du Développement Durable Et Des Relations Internationales  
IFOAM—International Federation of Organic Agriculture  
IFS—Integrated Farm Survey  
IMTA—Integrated Multi-Trophic Aquaculture System [Greece]  
INAO—Institut national de l’origine et de la qualité derogations?  
INRAE—National French Research Institute for Agriculture, Food, and Environment  
ITAB—French Organic Food and Farming Institute  
ISOFAR— International Society of Organic Agriculture Research  
KIS—Knowledge and Innovation System  
KNOW—Knowledge transfer [CAP intervention]  
LCA—La Cooperation Agricole  
LEADER—Liaison Entre Actions de Développement de l’Économie Rurale  
LF—Danish Agriculture and Food Council  
LFI—Austrian Rural Institute for Further Training  
LKNÖ—Chamber of Agriculture in Lower Austria  
LKNO- Landwirtschaftskammer Niederösterreich  
LLH –Landesamt für Landwirtschaft Hessen  
LOHAS—Lifestyle of Health and Sustainability [consumer group]  
LPIS—Land Parcel Identification System  
MA—Market Authorisation

MAB—Maintenance Payments Agriculture Biologic [France]  
MADR—Ministry of Agriculture and Rural Development [Romania]  
MASAF—Ministero dell'agricoltura, della sovranità alimentare e delle foreste [Italy]  
MDKK—Million Danish crowns (currency)  
METABIO—INRAE established organic metaprogramme  
MFF—Multiannual Financial Framework  
Mha—million hectares  
MIPAAF—Ministry of Agriculture and Forest Policies [Italy]  
MNAP—Multiannual National Action Plans  
MoA—Memorandum of Agreement  
MOOC—Massive Open Online Course  
MS—Member States (of the EU)  
MSC—Marine Stewardship Council  
N—Nitrogen  
NGO—Non-Governmental Organisation  
NSPA—National Strategic Plan for Aquaculture [Italy]  
NUTS2—Nomenclature of Territorial Units for Statistics—Level 2 basic regions  
OAP /NOAP—(National) Organic Action Plan  
OET—Organic on Every Table scenario  
OFCAP—Organic Farming and Common Agricultural Policy [EU project]  
OGs—Operational Groups of the European Innovation Partnership for Agricultural Productivity and Sustainability  
OMI—Organic Marketing Initiatives  
OMIARD—Organic Marketing Initiatives and Rural Development [EU project]  
ÖMKi—Ökológiai Mezőgazdasági Kutató Intézet [Research Institute for Organic Agriculture Hungary]  
ÖPUL—Austrian Rural Development Programme  
OrganicRevision—Revision of the European Regulation 2092/91 defining organic farming [EU project]  
ORGAP—Evaluation of the European Action Plan for Organic Food and Farming [EU project]  
OrgDataNet—Data network for better European organic market information [EU project]  
PDO—Protected designation of origin  
PGI—Protected geographical indications  
PIF—Integrated Supply Chain Projects [Italy]  
PPDAB—Plan Pluriannuel de Développement de l'Agriculture Biologique  
PSG—Participatory Guarantee Systems  
R&D—Research and Development  
R&I—Research and Innovation  
RAS—Recirculating Aquaculture Systems  
RMT—Réseau Mixte Technologique, Mixed Technology Network  
SAIO—Statistics on Agricultural Inputs and Outputs [EU SAIO Regulation]  
SCAR/EU SCAR—Standing Committee on Agricultural Research  
SDG—Sustainable Development Goal  
SEGES—Danish National Knowledge Centre for Agriculture  
SINAB—National Information System on Organic Agriculture, Italy  
SME—small and medium-sized enterprises  
SRIA—Strategic Research and Innovation Agenda  
SP—Strategic Plans [national implementation of the CAP in MS]  
TI—Thünen-Institut  
TV—Television  
UAA—Utilised agricultural area



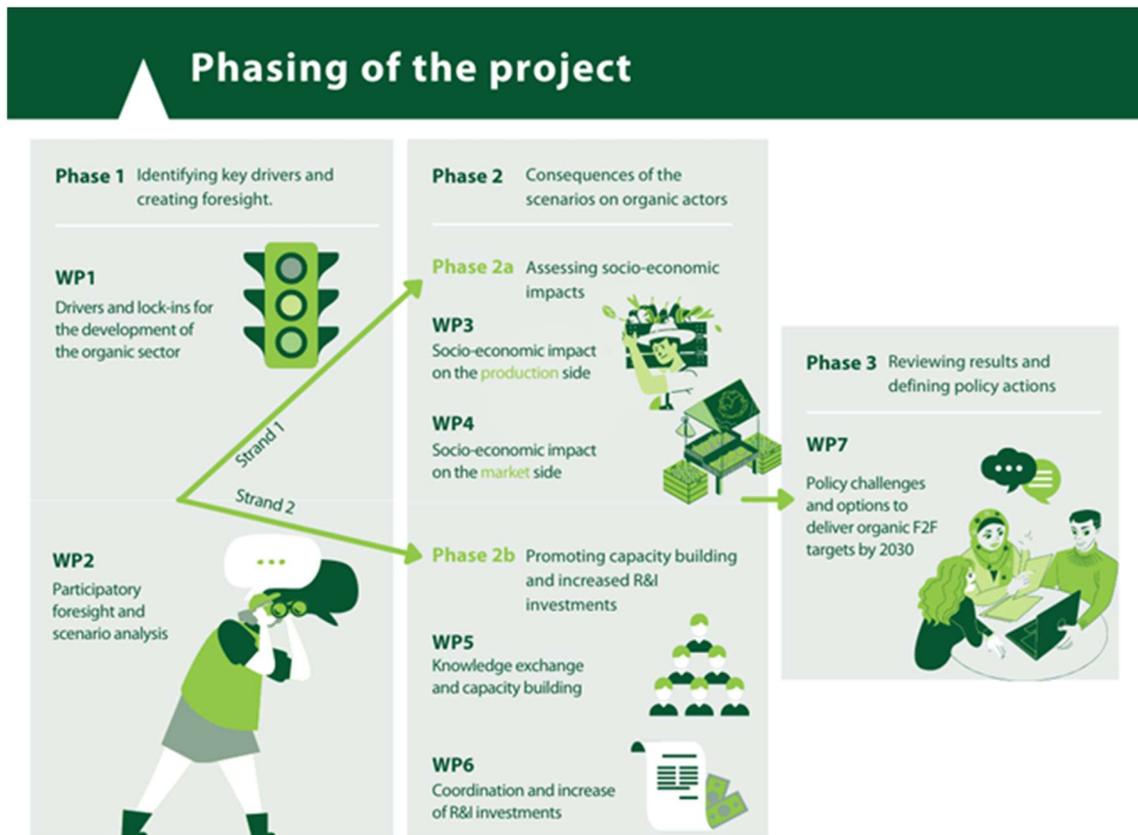
UMT—Unité Mixte Technologique  
US—United States of America  
USH—Spiru Haret University [Romania]  
VAT—Value Added Tax  
WOS—World of Science  
WP—Work Package  
ZÖL—The Future Strategy for Organic Agriculture [Germany]

**ISO Country codes**

AT—Austria  
BE—Belgium with F for Flanders and W for Wallonia  
BG—Bulgaria  
CY—Cyprus  
CZ—Czechia  
DE—Germany  
DK—Denmark  
EE—Estonia  
EL—Greece  
ES—Spain  
FI—Finland  
FR—France  
HR—Croatia  
HU—Hungary  
IE—Ireland  
IT—Italy  
LT—Lithuania  
LU—Luxembourg  
LV—Latvia  
MT—Malta  
NL—Netherlands  
PL—Poland  
PT—Portugal  
RO—Romania  
SE—Sweden  
SI—Slovenia  
SK—Slovakia

# 1 Introduction

The OrganicTargets4EU project supports the EU Farm to Fork and Biodiversity Strategies' aim to reach 25% of agricultural land (UAA) under organic farming and a significant increase in organic aquaculture by 2030. It is focused on the achievability and socio-economic and environmental impacts of reaching the targets, in terms of production and market development, as well as advisory, training and research support. The project was built around three phases and two key strands (Figure 1.1).



**Figure 1.1: Schematic outline of the Organic Targets for EU project**

This report represents the outcome of Phase 3 of the OrganicTargets4EU project: Reviewing results and defining policy actions. The achievement of the organic F2F targets depends on the decisions of many different individuals, businesses, and institutions and has the potential to develop in a range of different directions. It also depends on the policy frameworks in place, including the CAP Strategic Plans, Horizon Europe, the EU organic regulations, EU and national organic action plans, and specific individual measures, most of which are focused on the current multi-annual financial framework to 2027.

The results of the Production and Markets and Knowledge and Innovation strands have been integrated and their relative implications for policymaking assessed, with respect to short term issues to be addressed in 2025-2027, as well as thinking forward to the next 2028-2034 multi-annual financial framework. This has generated, in dialogue with farming, aquaculture, value chain, policy, business, research, and NGO actors, a series of policy recommendations set out in this report, to help ensure achievement of the organic F2F targets.

## 1.1 Objectives

This report was prepared as part of WP7: Policy challenges and options to deliver organic F2F targets by 2030. The objectives defined for this work package (WP) were to:

- Review the WP1-6 outcomes to identify policy gaps, priorities for action and assess likelihood of achieving organic F2F targets and under what conditions (Tasks 7.1 and 7.2)
- Assess the relevance of the policy gaps and priorities for action identified (Tasks 7.1 and 7.2)
- Define relevant policies to be implemented in the 2025-2030 period and beyond (Task 7.3)

WPs 1-6 covered the following topics: Analysis of current and past developments of the organic sector to determine drivers and barriers, including current policy support for organic farming and aquaculture (WP1); develop scenarios and pathways for reaching the organic F2F targets (WP2); and assessment of the impacts of these scenarios across two strands: markets and production (WP3 and WP4) and knowledge and innovation (WP5 and WP6).

## 1.2 Approach

### 1.2.1 Summary of key steps for identifying policy gaps and priorities for action

Tasks 7.1 and 7.2 used the same approach to identify policy gaps, challenges and development needs, and priorities for action. They were focused on the two different strands of the project: Production and Markets (Task 7.1) and Knowledge and Innovation (Task 7.2).

1. **Review of project results** (published and unpublished deliverables and other outputs) from WPs 1-4 for the Production and Markets strand, and WPs 1, 2, 5, and 6 for the Knowledge and Innovation strand. Key issues identified were compiled in a slide set prepared for seven national workshops under nine key themes (see Section 1.3). Aquaculture was identified as a separate EU-wide theme. Work package leaders and other project partners were asked to feed back on the interpretation of their work.
2. **Key documents for policy context** at EU and national level and some results from related projects were identified for each theme and reviewed to provide a relevant framework for the analysis and discussions.
3. **National workshops** were organised by the practice partners in AT, DE, DK, FR, HU, IT, and RO in May-June 2025, supported where possible by project researchers and following a common set of guidelines (see below). The workshops were attended by 117 participants in total, 48% of whom were women (see Table 1.1). The participants included policymakers, representatives of organic and other farming organisations, of food business actors, of research and environmental and other relevant interest groups. Some of the participants had participated in previous workshops and were therefore familiar with the project process. The discussions of the themes at the national workshops are included in each chapter of key themes.
4. A pan-European **sector workshop for Aquaculture** organised by the relevant partners involved took place online.
5. The outcomes from each of the preceding steps provided the basis to identify **draft key policy recommendations** for each of the different themes, for further discussions at project events, conferences and with experts from the EU Commission (see below).

**Table 1.1: Date (2025) and participants of seven national and one sector workshops to discuss policy options and recommendations**

Country	Date	Participants	Women	Topics discussed
AT	13 June	17	4	Six
DE*	21-22 May	9 (+2)	7	Nine
DK	30 June (online)	11	8	Six
FR	23 June	17	9	Six
HU*	21 May	14 (+1)	10	Nine
IT	16-17 June	15	5	Six
RO	22 May	21	7	Nine
<b>Aquaculture</b>	19 May (online)	11	5	Nine
<b>Total</b>		115	55	

\* Additional feedback was received from 2 persons in Germany and one in Hungary who could not attend

### More details and limitations of the national workshops

A common set of guidelines and presentation framework (slide set) in English was developed by the Task co-ordinators. This was translated into the national languages for the national workshops. Translations of national workshop and non-English documents was supported by [www.DeepL.com/Translator](http://www.DeepL.com/Translator). National workshop organisers were asked to integrate slides for each theme setting out specific national issues and providing relevant national policy and other documentation, including the national organic action plans identified in WP1.

According to the guidelines, for each topic the following elements should be presented:

- Current status (based on project results and other relevant evidence)
- Development needs (to address threats, weaknesses, and achieve significant expansion)
- Policy gaps and challenges
- National perspectives relevant to the above

The same questions were to be discussed for each topic:

- Does the current status description reflect the national or sector situation?
- Are the identified development needs and policy gaps/challenges appropriate?
- What is missing?
- What would be good policy options to address the above, taking account of relevant contexts?
- What are particular policy opportunities (e.g., new CAP, new action plans) in the national context?

Most workshops were held on a single day, two were held over two days and one workshop took place online. The participants included policymakers, representatives of organic and other farming organisations, of food business actors, of research and environmental and other relevant interest groups. Some of the participants had participated in previous workshops and were therefore familiar with the project process.

Some **limitations** of the workshop approach should be noted. The workshop organisers could adapt the agenda somewhat to reflect participant expertise and timing and other constraints, which resulted

in a reduced consistency of the outcomes: three national and the aquaculture workshop covered all nine themes, four national workshops discussed only six of the nine key themes (see Table 1.1).

While it had been foreseen in the project planning that Nominal Group Technique methodology would be applied to help achieve consensus in the workshops, this did not prove possible in practice, due to the range of topics and the diversity of stakeholders involved. Instead, a prioritisation exercise was conducted to get a sense of the significance attributed by each group to the different themes discussed. Where possible, conclusions from the national workshops are presented in order of priority—this is indicated where applicable.

## 1.2.2 Discussion and finalisation of policy recommendations

Task 7.3 was focused on the development of specific policy recommendations to achieve the organic F2F targets. Building on the results of Tasks 7.1 and 7.2, specific policy recommendations were drawn up, covering all the key themes identified (see Section 1.3).

The policy recommendations cover:

- short-term options within existing policy frameworks, CAP strategic plans and EU or national organic action plans in 2025-2027,
- opportunities for policy developments in the next phase of CAP and Horizon Europe reform from 2028, organic regulation and horizontal legislation on inputs, public procurement etc., as well as subsequent EU and national organic action plans, particularly for the period up to the target date of 2030, and
- horizon scanning for the future development of the sector post 2030 in the context of the whole next multi-annual financial framework to 2034.

### Additional interviews for countries that were not focus countries

Several of the focus countries (AT, DE, DK, FR) experienced low interest in conversion, and in some cases reversion to conventional production. This was a consequence of limited market demand due to the return to more normal purchasing behaviours following the pandemic and the period of high food price inflation following the Russian invasion of Ukraine in 2022 (see Padel et al. 2025 for more details). At the same time, other countries that were not focus countries of the project, notably BG, IE, GR and PT, experienced very rapid growth in organic land area, with Portugal and Greece both reaching 22% of UAA in 2023. To understand better the different trends in these countries, and in addition to the planned work, additional interviews were conducted with key stakeholders, experts, and policymakers in these four countries in May-July 2025. The WP7 co-ordinator was also able to attend a workshop in Sweden in May 2025 on the reasons for Sweden experiencing the most significant reductions in organic land area of any EU Member State between 2018 and 2023, with a further 10% reduction in 2024, and possible solutions to address this.

### Further discussions of the draft recommendations

The draft policy recommendations were discussed at international conferences and with EU Commission experts to review and further refine them.

- The **Organic Summit**<sup>1</sup>, held in Copenhagen in August 2025 under the Danish Presidency of the EU, focused on the achievement of the EU's 25% organic by 2030 target and provided a first opportunity to debate and revise some of the policy recommendations. Several breakout sessions focused on barriers to conversion, the CAP from 2028, and capacity development and organic action plans. For each theme, elements of the Summit Charter for achieving the 25% target and of the proceedings of the conference plenaries and workshops are included below (see also Anon 2025).

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<sup>1</sup> <https://os25.org/>

- In September and October 2025, **interviews** with key European Commission policymakers were undertaken (mostly on-line) to reflect and refine the recommendations.
- A **statement of organic sector development needs and priorities to 2030** and the revised policy recommendations were debated in the final project conference in Brussels in November 2025. This included option testing in the context of the scenarios developed, the feasibility and conditions required to reach the organic F2F targets, and the challenges and solutions needed to address them (see also Zanolli et al. 2026).

Four-page **policy briefs** covering the key themes have been prepared, based on the more detailed considerations that are presented in this report (one policy brief for each chapter, see D8.7 12 Policy briefs (Lampkin et al., 2026).

### 1.3 Key themes identified for the national workshops

Based on our review of the project outcomes, nine key themes were identified in an agricultural context, with aquaculture treated as a separate theme given the different policy and regulatory context. These themes were discussed at the national workshops, the outcomes of which are presented in the respective chapters within this report. They include:

1. **Organic production support payments**, typically but not exclusively area-based payments for conversion to and maintenance of organic production, as well as interactions with eco-schemes, agri-environmental or climate schemes, and alternative options (see Chapter 3). The topic is mainly addressed in Lampkin et al. (2024).
2. **Supply chain development** covering issues relating to retailing, out-of-home catering (HORECA), public procurement, imports and exports, as well as supply chain co-ordination and co-operation (see Chapter 4). The topic was mainly addressed in Cisowski & Serre (2024) and Schiavo (2025b).
3. **Consumer demand** influences, including promotion campaigns and retailer and caterer communications (see Chapter 5). The topic is mainly addressed in Frank et al. (2025).
4. **Advice and mentoring**, including conversion information, technical, environmental, and business advice, advisor training, group actions, peer-to-peer networks, and individual mentoring. In this report and in the policy brief, the theme was merged with training and education under the common heading of AKIS (see Chapter 6). Advice and mentoring are mainly addressed in Nagy et al. (2023) and Padel et al. (2025).
5. **Training and education**, including professional development training for producers, advisors, trainers, inspectors, and others working with food and farming businesses, and education supporting next generation consumers, producers and other professions, in schools, colleges and universities. This is covered together with advice under the common heading of AKIS (see Chapter 6). Training and education were mainly addressed in Nagy et al. 2023) and Reinecke et al. (2023).
6. **Research and innovation**, including applied approaches involving producers and other stakeholders, priority topics and approaches for R&D in general, and co-ordination of organic-specific research funding (see Chapter 7). This topic is mainly addressed in Gernet et al (2025) and in Trkulja et al. (2025).
7. **Statistics and market data**, which emerged as a key issue in relation to both data for research conducted during the project (e.g., WP3), and the need for farms, food businesses and policymakers to have access to good quality data for investment decision-making and outcome evaluation (see Chapter 8).

8. **Capacity development**, including both within the organic sector and within institutions working with the organic sector, as a cross-cutting theme covering market development, information services and research. In this report and in the policy briefs the theme was integrated with organic action plans (see Chapter 10).
9. **Organic action plans**, involve integration of public and market good and supply-push and demand-pull policies, and coherences with broader policy frameworks. This is another cross-cutting theme with relevance to all the above themes, but with potential for improvement with respect to scope, implementation and evaluation and the integration (see Chapter 10). The topic is mainly addressed in Lampkin et al. (2024).
10. **Aquaculture** also covers many of the themes outlined above, but with specific technical, business, regulatory and policy aspects needing to be addressed in an integrated manner (see Chapter 9). The topic was covered in most work packages, but is mainly addressed in Lampkin et al., (2024).

## 1.4 Policy context

The results of this project need to be considered in the prevailing policy and regulatory contexts in the European Union and its Member States. This includes both current and former policies, reviewed in D1.2 (Lampkin et al., 2024), as well as policy changes currently being debated that are likely to impact the sector over the next 10 years. Of relevance in this context are the Common Agricultural Policy (CAP) programming periods 2014-2020, extended to 2022, 2023-2027, and 2028-2034.

Historically, the policies that have most affected the development of the organic sector, apart from the CAP direct payments and rural development support available to all producers, are the agri-environmental support for **organic conversion and maintenance** introduced in 1994 (Regulation (EEC) 2078/92) and the EU **organic regulation** (EEC 2092/91). These provided both a legislative basis for organic market development and policy support, and financial support for the sector. The support as part of mainstream CAP frameworks, including prioritisation of organic farming for some general rural development measures such as investment aids, has been supplemented by funding for research, for promotion campaigns and green public procurement initiatives, as well as three EU-level **organic action plans**, in 2004, 2014, and 2021 (EC 2004, 2014, 2021).

These policies have been subject to detailed research and revision over the last 30 years, including as part of the seven-year CAP reform cycles since 1994. EU-funded research projects have supported the policy development process, including: Organic farming and the CAP (OFCAP, 1997-2000), Organic Marketing Initiatives and Rural Development (OMIARD, 2001-2004), Extension of Organic Farming Policies to Central and Eastern European Accession Countries (EU-CEE-OFP, 2003-2005), European Information System for Organic Markets (EISfOM, 2003-06), Organic Revision (2004–2007), Organic Action Plan Evaluation (ORGAP, 2005-2008), Costs of Organic Certification (Certcost, 2008-2011) and Organic Data Network (2012–2014). Studies were also commissioned directly by DG AGRI (e.g., Sanders 2011) and DG ENVI (Häring et al., 2004).

In the last decade, the EU's **Green Deal** (EC 2019), and the **Farm to Fork** (EC 2020a) and **Biodiversity** (EC 2020b) Strategies, designed to support the Green Deal in a food and agricultural context, set key targets for environmental issues and organic sector development. In addition to the 25% organic share of EU UAA and a significant increase in organic aquaculture by 2030 target set in the two Strategies, targets were also set to

- Reduce the overall use and risk of chemical pesticide use, and the use of more hazardous pesticides, by 50%
- Reduce nutrient losses by 50% and fertiliser use by 20%

- Reduce overall EU sales of antimicrobials for farmed animals and in aquaculture by 50%
- Achieve a 10% share of farmland prioritised for biodiversity

The targets were to be supported by positive actions and regulations for better nutrient and pest management, including the Nature Restoration Law (EU 2024/1991), and several other issues relating to nutrition and the environment were included in the strategies. Achieving the 25% organic target would also make a significant contribution to these other targets. In the light of farmer protests in several countries against aspects of the CAP implementation, and changes in political direction in several MS governments since 2023, less emphasis is now placed on these targets and their underlying strategies.

As part of the latest CAP reform covering 2023 to 2027, the EU introduced the concept that Member States should be responsible for developing their own policy programmes for agriculture and the environment in the form of **CAP National Strategic Plans**. Instead of determining the policy frameworks centrally, the EU would set key objectives for CAP delivery, and MS would have to demonstrate how the policies implemented would contribute to meeting the objectives. Against the background of the 25% organic target and the EU Organic Action plan, Member States were strongly encouraged to include organic conversion and maintenance payments in their CAP Strategic Plans, setting targets for land areas to be supported as organic by 2027, and to develop national organic action plans with longer-term targets.

The following sub-sections set in more detail relevant policies and position papers that provide the context for the recommendations.

#### 1.4.1 EU Organic Action Plan (2021) and Organic Sector Roadmap (2025)

The latest EU Organic Action Plan (EU, 2021) was drawn up during the process of the CAP transition from EU-directed measures to national measures in the CAP National Strategic Plans. It has a key guidance role for Member States, both with respect to the 25% target and to the inclusion of organic farming in CAP NSPs. It features 23 actions, split between three axes that reflect the structure of the food supply chain and the Green Deal's sustainability objectives:

- **Axis 1:** stimulate demand and ensure consumer trust, by promoting organic farming and the EU logo, promoting organic canteens and increase the use of green public procurement, reinforcing organic school schemes, preventing food fraud and strengthen consumer trust, improving traceability, and facilitating the contribution of the private sector.
- **Axis 2:** stimulate conversion and reinforce the entire value chain, by encouraging conversion, investments and exchanges of best practices, developing sector analysis to increase market transparency, supporting the organisation of the food chain, reinforcing local and small-value processing and fostering short supply chains, improving animal nutrition in accordance with organic rules, and reinforcing organic aquaculture.
- **Axis 3:** organics leading by example: improve the contribution of organic farming to environmental sustainability by reducing climate and environmental footprint, enhancing genetic biodiversity and increasing yields, developing alternatives to contentious inputs and other plant protection products, enhancing animal welfare, and making more efficient use of resources.

The Action Plan promised stronger support for organic farming in the current CAP (2023-2027) and encouraged Member States to make use of this support and to develop their own national action plans, motivated by the 25% target. This was developed in the process of national CAP Strategic Plan negotiations.

While the project did not undertake an evaluation of the current EU Organic Action Plan (the Commission is undertaking its own review), the Plan has clearly had impact with respect to the implementation of support payments in the CAP Strategic Plans, national targets and action plans (Lampkin et al., 2024). Initiatives such as the EU Organic Day have significantly increased the visibility

of the sector, while the EU Organic Awards highlight best practices and innovation, inspiring other actors and generating benefits for national organic communities. Ring-fenced budgets within promotion policies have supported many initiatives to raise awareness and uptake of organic products in Member States. The organic ambassador network has been valuable in exchanging best practices of Member States at EU level. The development of bio-districts has also been noteworthy. However, some actions relating to public procurement guidelines and the real price of food have not yet been completed, and it is unclear how the commitment to dedicate at least 30% of EU research and innovation funding in agriculture, forestry, and rural areas to organic-relevant topics has been applied in practice.

The EU Roadmap for the Organic Sector announced in December 2025<sup>2</sup> set out three key priorities for developments in 2026. First, a targeted amendment of the organic regulation to address some specific legal and simplification issues. Second, a roadmap for revisions to the secondary organic regulations to address some technical issues. Third, the Commission will launch a consultation process with Member States and stakeholders to update the current EU Organic Action Plan, which expires at the end of 2026, taking into consideration the economic context of the EU organic sector. The potential contribution of organic farming to the Commission's Generational Renewal Strategy is also highlighted in this context.

Apart from aquaculture, this report does not address regulatory questions specifically, but the proposed review of the EU Organic Action Plan is potentially highly significant for future organic policy.

There has been some concern that the overall change in policy emphasis in the EU and many Member States, to focus more on competitiveness and less on environmental outcomes, and in particular the reduced emphasis on the Green Deal and related Strategies, could lead to the downgrading of organic support in future. However, the future CAP and other proposals reviewed below, indicate that the emphasis on organic farming remains strong. This is amplified by statements from Commissioner Hansen on publication of the Roadmap that '*organic farming is central to the future CAP, and we are strengthening our support so farmers can convert, invest and grow with confidence*', as well as reference to organic as the '*gold standard for sustainability*' in the EU in the Vision for Agriculture and Food (see below), as well as continued commitments to the 25% target by the head of DG AGRI in public fora such as Biofach in 2026.

#### 1.4.2 European Court of Auditor's report on organic farming policy

A further influence on the development of future organic policy in the EU is the report from the European Court of Auditors on organic farming policy (ECA, 2024). They concluded that there were gaps in both EU and national policies, with insufficient attention being made to environmental and market objectives. EU and national organic action plans also had gaps, in particular relating to quantifiable targets and the data needed to assess policy impacts, as well as a lack of perspectives beyond 2030. Big differences in the state of organic sector development and policy support among Member States were noted. Member States would need to do much more for the 25% target to be reached. Organic action plans could play a role, but the low quality of these plans weakens their impact. While the Commission monitors EU spending for organic farming area payments and the size of the supported area, it also lacks data on how other EU Rural Development spending supports the development of the organic sector beyond organic farming, especially considering changes to organic data collection (see Chapter 8).

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<sup>2</sup> EU Organic Sector Roadmap 2025: [https://agriculture.ec.europa.eu/media/news/organic-rulebook-fit-future-2025-12-17\\_en](https://agriculture.ec.europa.eu/media/news/organic-rulebook-fit-future-2025-12-17_en) (accessed 23.02.26)

### 1.4.3 The Strategic Dialogue and the Commission Vision for Agriculture and Food

Following the farmer protests in 2022-2023, and more recently changes in the composition of the EU Commission, Parliament, and many Member State governments, there have been increasing tensions between different perspectives on the future of agriculture. One, more strongly associated with the Green Deal and the previous EU Commission, is focused on an environmental agenda encompassing climate, biodiversity, pollution, resource conservation and animal welfare. This environmental focus has engendered a backlash, with a stronger focus on a social agenda including simplification, flexibility, farmer-friendly policies, competitiveness, and food security. Since 2023, the EU Commission has been trying to find a way forward to bridge the different perspectives.

One key initiative was the **Strategic Dialogue on the Future of EU Agriculture**, which in 2023 brought together 29 major stakeholders from the European agri-food sectors, civil society, rural communities and academia, that reached a common understanding on the further development (EU Commission 2024). In particular, the Strategic Dialogue report explicitly recognised organic farming as a prime example of a food production system that reconciles nature protection and farmers' income and as the only legally defined and regulated sustainable production system in the EU and should be upscaled. It also supported the concept of sustainability benchmarking as a tool to assess different farming systems environmental impact and to enable the development of policies to reward environmental outcomes on farms.

In February 2025, the Commission presented its **Vision for Agriculture and Food**<sup>3</sup>, (EU Commission 2025a) as a basis for future policy development. Building on the Strategic Dialogue and stakeholder engagement through the European Board for Agriculture and Food, including organic sector representation, the Vision sets out objectives to a) recognise agriculture and food as strategic sectors, b) strengthen competitiveness and attractiveness of the sector, and c) ensure long-term growth, innovation, and societal benefits, including rewarding ecosystem services.

In the Vision, the Commissioner considers organic farming to be the Gold Standard for sustainable agriculture in the EU. Maintaining this position could be a significant challenge due to the arrival of other approaches such as regenerative agriculture. It is therefore important to maintain a clear identity for organic farming, also in the context of the marketplace, when consumers are faced with similar claims at lower prices. The Vision emphasises the need to create conditions in which consumers are enabled to make sustainability choices (see details in Chapter 5), highlights the need to address skills shortages and mismatches in the farming sector and invest in training and advice (see Chapter 6 for details), pressing that innovation and knowledge must reach farmers (see Chapter 7 for details).

### 1.4.4 The Multi-annual Financial Framework and related policy frameworks, including the CAP and CFP, after 2027

The proposals for the next Multi-annual Financial Framework (MFF) published in July 2025 envisage further significant changes to the way EU policy for agriculture and fisheries is organised and financed (Figure 1.2). One of the largest changes is that many policy programmes, including the CAP and the Common Fisheries Policy (CFP) will be integrated into overarching National and Regional Partnership Plans, to be prepared by the Member States. While the CAP retains ca. €300 billion ring-fenced funding for the Degressive Area-Based Income Support (DABIS), other agricultural, fisheries incl. aquaculture, and rural development policies are subject to Member State co-financing and priorities.

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<sup>3</sup> Vision for Agriculture and Food: [https://agriculture.ec.europa.eu/overview-vision-agriculture-food/vision-agriculture-and-food\\_en](https://agriculture.ec.europa.eu/overview-vision-agriculture-food/vision-agriculture-and-food_en) (accessed 25.02.26)

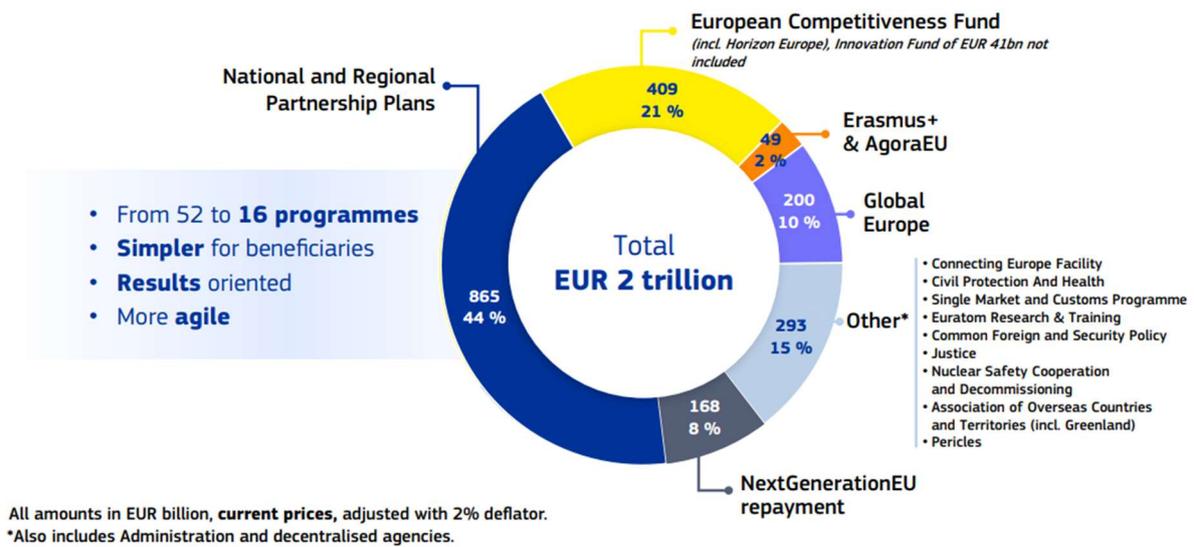


Figure 1.2: Overview of the proposed Multi-annual Financial Framework for the EU, 2028-2034

Source: European Commission<sup>4</sup>

The proposed regulation governing the NRPP process (2025/0240)<sup>5</sup> contains a significant reference to organic farming with relevance both to the administration of the organic control system and to the availability of statistical and market data (see Chapter 8):

*The Fund shall also support all other technical and administrative assistance required to implement and manage the Common Agricultural Policy and Common Fisheries Policy, including fisheries control and enforcement measures, market controls, collection or purchase of data, including satellite data, geo-spatial data and meteorological data, monitoring of resources, **development and maintenance of electronic certification of organic products and related corporate information technology systems**, development, registration and protection of the indications, abbreviations and symbols referring to the Union quality schemes and contributions under international agreements.*

Article 63 (Data collection and recording) specifies:

*1. For the purposes of audit and controls, transparency and performance monitoring and evaluation, Member States shall collect, record and store electronically the information referred to in points (a) to (g), while ensuring the security, integrity and confidentiality of data and the authentication of users and allowing automated data exchange with the electronic system identified by the Commission: the type of farming, **whether the holding is farmed organically**, the total number of hectares of arable land, of permanent grassland area, with permanent crops, on which no agricultural activity is performed but which are eligible, the total number of hectares, subject to stewardship, out of which protected practices;*

<sup>4</sup> European Commission (2025) Directorate-General for Budget, *Europe's budget – An ambitious budget for a stronger Europe 2028-2034*, 2025, <https://data.europa.eu/doi/10.2761/3758793> (accessed 25.02.26)

<sup>5</sup> COM(2025) 565 final Regulation 2025/0240 (COD): Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the European Fund for economic, social and territorial cohesion, agriculture and rural, fisheries and maritime, prosperity and security for the period 2028-2034 and amending Regulation (EU) 2023/955 and Regulation (EU, Euratom) 2024/2509.

A separate proposed regulation (2025/2041)<sup>6</sup> sets out the basis for the future CAP (2028-2034) and includes several specific references to organic farming.

Article 3 (**Farm stewardship**) and Annex 1 Part A set out the basis for statutory management requirements and the protective practices to be included by Member States in their NRP plans. With respect to the protection of soils and water against erosion, loss of organic matter, pollution and runoff, organic farming is considered 'green by definition':

*Farmers whose entire holding is certified in accordance with Regulation (EU) 2018/848 of the European Parliament and of the Council<sup>12</sup> shall be **deemed to comply with protective practices** set out in the NRP Plans in respect to objectives set out in paragraph 4, points (b) and (c).*

Article 4 (**Environment and climate priority areas**) identifies organic farming as one of six environmental and climate priority areas that Member States must make provision for. The other areas identified—climate change, soil health, biodiversity, and animal welfare—are also relevant to organic farming.

Article 5 sets out the CAP interventions covered by the proposed regulation, which are similar in type to those available in previous CAP programming periods. Of particular relevance to organic farming are the following:

- Article 10 (**Agri-environmental and climate actions**) which specifies that Member States shall provide incentives for voluntary commitments to maintain organic farming, as well as for transition/conversion to organic farming. The commitments may be annual or multi-annual. Support for the transition actions shall be granted on the basis of a transition action plan drawn up by a farmer and approved by the Member State, with up to €200,000 in lump sum payments foreseen (see Chapter 3 for further details).
- Article 14 (**Setting-up of young farmers**, rural business start-up and development of small farms), including the setting up of new farmers, is relevant in the context of the recognition given to organic farming's potential in the Generational Renewal Strategy<sup>7</sup>, which highlights provision of loans and guarantee funds dedicated to young farmers, including instruments with reduced interest rates, lower collateral, grace periods, and longer repayment periods, under Member States' national envelopes and via the tools under the Starter Pack, including for organic farming over and above the lumpsum transition funding (see also Chapter 3). Article 15 (**Generational Renewal strategy**) requires MS to include a Strategy in their NRP Plans, while Article 16 sets out the basis for financial and information **Starter packs** to be made available to young farmers and new entrants.
- Articles 19 (Support for **knowledge sharing and innovation** in agriculture, forestry and rural areas), and 20 (**Agricultural knowledge and innovation systems and farm advisory services**) provide the basis for information and knowledge exchange, AKIS and EIP-Agri operational groups, which are highly relevant for organic farming (see Chapter 6).

The CAP Regulation contains no provisions for **Fisheries and Aquaculture**. These are less well defined in the overarching NRP Regulation (see Chapter 9), which may make it difficult to ensure that organic aquaculture can be supported on a similar basis to organic farming.

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<sup>6</sup> COM (2025) 560 final 2025/0241 (COD) Propos.al for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the conditions for the implementation of the Union support to the Common Agriculture Policy for the period from 2028 to 2034

<sup>7</sup> Generational Renewal Strategy: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52025DC0872> (accessed 25.02.26)



### 1.4.5 European Competitiveness Fund, Horizon Europe, and Erasmus+

In July the European Commission also published its proposals the European Competitiveness Fund (ECF) in the Multiannual Financial Framework (MFF). The proposal provides some understanding of the future of research and innovation (R&I) in Europe (EC 2025), including the next stage of **Horizon Europe** (FP10 from 2028 to 2034) (see Chapter 7 for further details).

The ECF potentially has wider impacts for supporting organic development, including supply chains and processing as well as international trade (see Chapter 4).

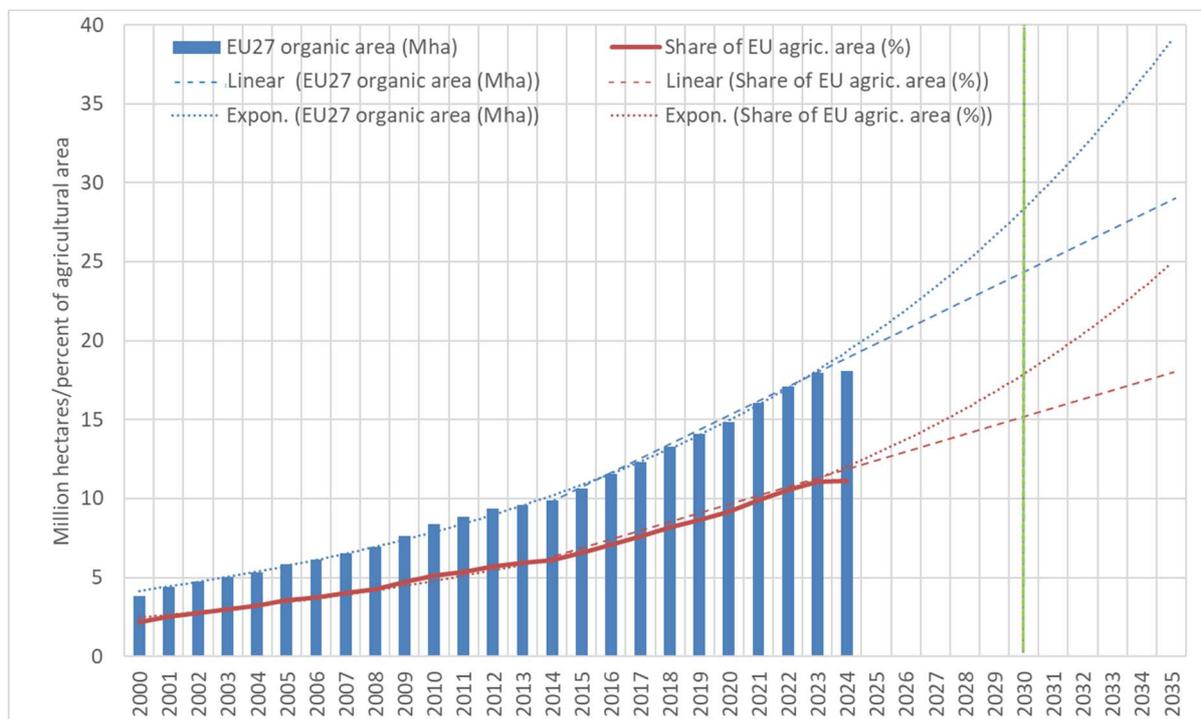
Alongside the ECF, **Erasmus+** will continue to operate as a standalone programme with distinct focus on education and training, but synergies with other programmes and initiatives are to be explored, such as collaboration with Agora EU focusing on culture. Erasmus+ is set to receive a significant funding boost in the 2028–2034 MFF, with a proposed budget of €40.8 billion marking a 50% increase from the previous period. This expansion underscores the EU's commitment to fostering educational mobility, inclusion, and solidarity across Europe. This is relevant to enhance training and education for organic farming (see Chapter 6 AKIS).

## 2 Organic sector development and targets

As a result of the various policy initiatives discussed in the previous chapter, including the introduction of an EU-wide legal definition in 1992 and of support for organic conversion and maintenance in 1994, organic farming has become an established part of European agriculture (Lampkin et al. 2024). Organic farmers have been front runners, providing inspiration and driving standards and innovation for sustainability, leading to the ambitious targets set for organic sector growth in the EU and many member states. For the 2023-2027 CAP programming period, €16 billion, equivalent to 5% of CAP resources and 20% of resources for environmental schemes, have been allocated to organic conversion and maintenance support (Lampkin et al. 2024) on 10% of EU agricultural land. This is in addition to the direct income payments for all farmers, including organic, and other agri-environmental and rural development investment schemes also open to organic farmers, as well as research and promotional funding.

### 2.1 Historical growth in organic land area and markets

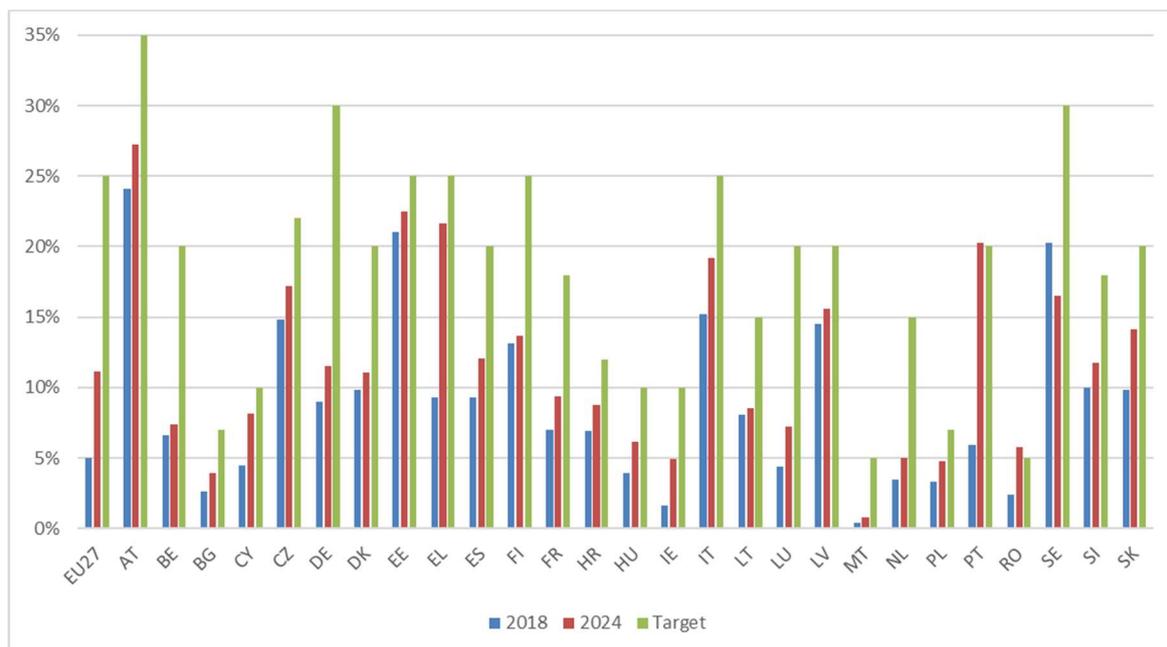
In 2024, 18.1 million ha (Mha) or 11.15% of EU agricultural land (UAA) was certified organic or in-conversion (Figure 2.1) and up to 12% may have been achieved at the time of this report. Until 2023, this represents a continuation of an exponential growth trend, with a doubling of the organic area every decade since 2000. In 1990, when the policies were being initiated, less than 0.5Mha was certified. However, the rate of growth slowed in 2024, potentially a consequence of the market disruption in 2022 and 2023 (Figure 2.2), with time lags due to the 2–3-year length of the conversion period. Slowdowns in growth of the organic sector have also been observed, at least in some countries, at the start of new CAP programming periods, due to uncertainties with policy changes and administrative delays in opening new schemes. Data uncertainties with respect to Greece and Portugal also exist (see below).



**Figure 2.1: Growth of certified organic and in-conversion land area (Mha) and share (%) of utilisable agricultural area (UAA) in the European Union, 2000-2024**

Source: Own presentation of data from FiBL Statistics (<https://statistics.fibl.org/index.html>)

The growth of organic land area in individual member states is however much more variable (Figure 2.2), as are the national targets that have been set by almost all MS in their CAP strategic plans or national organic action plans, typically for 2027 or 2030. The national targets averaged 18% of EU UAA. One country, Sweden, experienced a significant decline in organic land area between 2018 and 2024, while others including Greece, Portugal and Ireland showed rapid growth—Portugal and Romania have already exceeded the targets set. Detailed data on the growth of organic farming in each country since 1985 (if available) are provided in the Organic Sector Development factsheets on the project website<sup>8</sup>. As mentioned above chang-over effects between programming periods could also be relevant. Recent updates of the Organic Sector Development Factsheets also show that at least one-third of EU Member States have increased their organic support payment rates per ha in 2025/6 compared with the values presented in the national CAP Strategic Plans for 2023.



**Figure 2.2: Organic land area shares (% UAA<sup>9</sup>) in the EU and Member States in 2018 and 2024, and targets set for 2027 or 2030.**

Source: own representation of data derived from Lampkin et al (2024), Eurostat and FiBL Statistics<sup>10</sup>

The market for organic products, as measured by retail sales value, has also grown exponentially, trebling each decade since 2000. However, some countries, typically with well-established domestic organic markets (e.g., AT, DE, DK and FR) experienced a slowdown in growth as a result of difficult market conditions since 2022 (Figure 2.3). As Germany and France, together with Italy and Spain, account for most of the EU market, the market reversal can be seen also in the EU-level data.

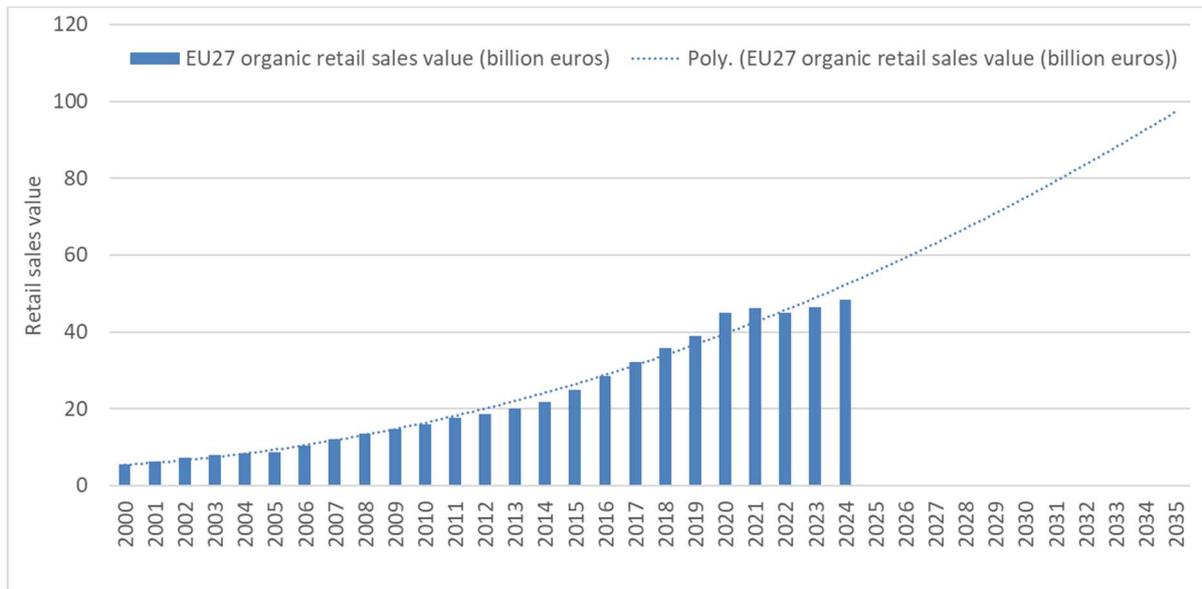
A combination of factors has contributed to this situation. In 2019/2020 the market grew more rapidly than previously as the Covid pandemic lockdowns forced people to consume more at home. Once the pandemic was over in 2022, consumers reverted back to pre-pandemic behaviours including more out-of-home catering, reducing the demand for organic products. This trend was exacerbated by the impacts of the Russian invasion of Ukraine on agricultural input prices and on food price inflation, which

<sup>8</sup> <https://organictargets.eu/organic-sector-factsheets/> (accessed 28.01.26)

<sup>9</sup> We have used Eurostat Mainfarm 2020 total UAA values to calculate organic shares. Some national data may vary due to difference in practice or more recent UAA data available.

<sup>10</sup> <https://statistics.fibl.org/index.html> (accessed 28.01.26)

also constrained consumer willingness to pay more for organic food. Despite the slowdown of market growth, organic retail sales did not fall below pre-pandemic levels, and more recent data indicates a return to growth both in value and volume. The slowdown in the market was, however, enough to dent producer confidence in conversion, and in some cases, for example in France and Austria, to farmers reverting back to conventional production.



**Figure 2.3: Growth of organic retail sales value in Europe and the EU, 2000-2024 and projection to 2035**

Source: FiBL-AMI Surveys 2001-2025 in World of Organic Agriculture (yearly)

Other factors have also reduced willingness to convert in some countries, including the growth of interest in organic alternatives such as agroecology and regenerative agriculture. This particular debate is often confusing due to the lack of definition of these alternative systems compared with the legal definition of organic food and farming systems, but it is also clear that they appeal to producers who may be concerned about the bureaucracy associated with organic certification. There needs to be clearer communication of underlying organic principles, as well as the requirements of organic regulations, as in many cases there is substantial common ground between organic and the alternative approaches. The legal definition and certification procedures provide clear advantages for organic in terms of market development and the implementation of support policies.

At the European level, the Commission has maintained its interest in supporting organic farming in the context of the changing policy environment described previously. The increased focus on competitiveness and food security, and reduced emphasis on environmental issues, may at first sight be seen as negative for organic farming. In some cases, for example France and Sweden, the policy shifts have led to organic targets being abandoned. The relevance of organic farming in this changing context is however complex to assess, as discussed in the following chapters.

### 2.1.1 Variability in growth rates in EU Member States

Despite the challenges identified above, not all EU Member States have experienced problems with organic sector growth during the life of this project, although this was the case with most of our focus countries (Austria, Denmark, France, Germany and Hungary) as well as Sweden (Figure 2.4). So far, only France and Sweden have experienced significant reconversion of farms back to conventional. In the other countries, the declines are within the range that might be expected for losses due to death,

divorce, retirement, holding consolidation etc., with insufficient new converters to replace them. The situation in France has prompted a study of scenarios for the development of the sector up to 2040<sup>11</sup>.

Sweden is highlighted as it is the only EU MS to have less organic land in 2024 than in 2018, with a 10% decline in 2024 alone. Market factors have been important in this case, with retail sales value shares for organic falling from 7.2% in 2016 to 4.3% in 2024. Policy disengagement appears also to be a relevant factor, with the abandonment in 2023 of the national organic action plan and targets set in 2017 and the ending of investment in organic-specific research (Ullven 2025).



**Figure 2.4: Organic land area (ha) and share (%) of 2020 UAA in low or declining growth countries: Austria, Denmark, France, Germany, Hungary, Sweden**

Source: own representation of data from Eurostat (Mainfarm) and FiBL Statistics

The Swedish Food Strategy 2025 highlights the machinery and cultivation methods associated with organic farming as potentially beneficial for conventional farms, but no other benefits for the environment or citizens are listed. As a consequence of the sharp decline in Sweden, for decades a leader in European organic farming, a research project was commissioned to address the constraints on the expansion of organic farming in Sweden (Smith et al 2025). However, this focused more on

<sup>11</sup> France Bio 2040: <https://agriculture.gouv.fr/une-prospective-2040-pour-lagriculture-biologique-francaise-analyse-ndeg221> (accessed 26.02.26)

technical issues such as nutrient availability, weed control and yields, and less on socio-economic and policy factors. Various initiatives have been launched in 2025 to try to address the problem, including a focus on organic farming as an option for food security and domestic resilience in Sweden<sup>12</sup>.

Yet other countries have experienced substantial growth over the same period. Of the OrganicTargets4EU project focus countries, Italy and Romania were not affected in the same way and experienced continued growth, although from quite different starting points (Figure 2.5). These two countries are featured in the national perspectives sections for each policy theme below and are therefore not addressed in detail here. Bulgaria, Ireland, Portugal and Greece have also shown strong growth in recent years, but were not focus countries in this study. Excluding Greece and Portugal, for reasons explained in more detail below, the remaining four countries shown in Figure 2.5 together with Poland accounted for nearly 350,000 ha annual growth in 2023 and 300,000 ha in 2024. Spain, also not shown here, alone grew by more than 300,000 ha in 2023 but lost 50,000 ha in 2024.

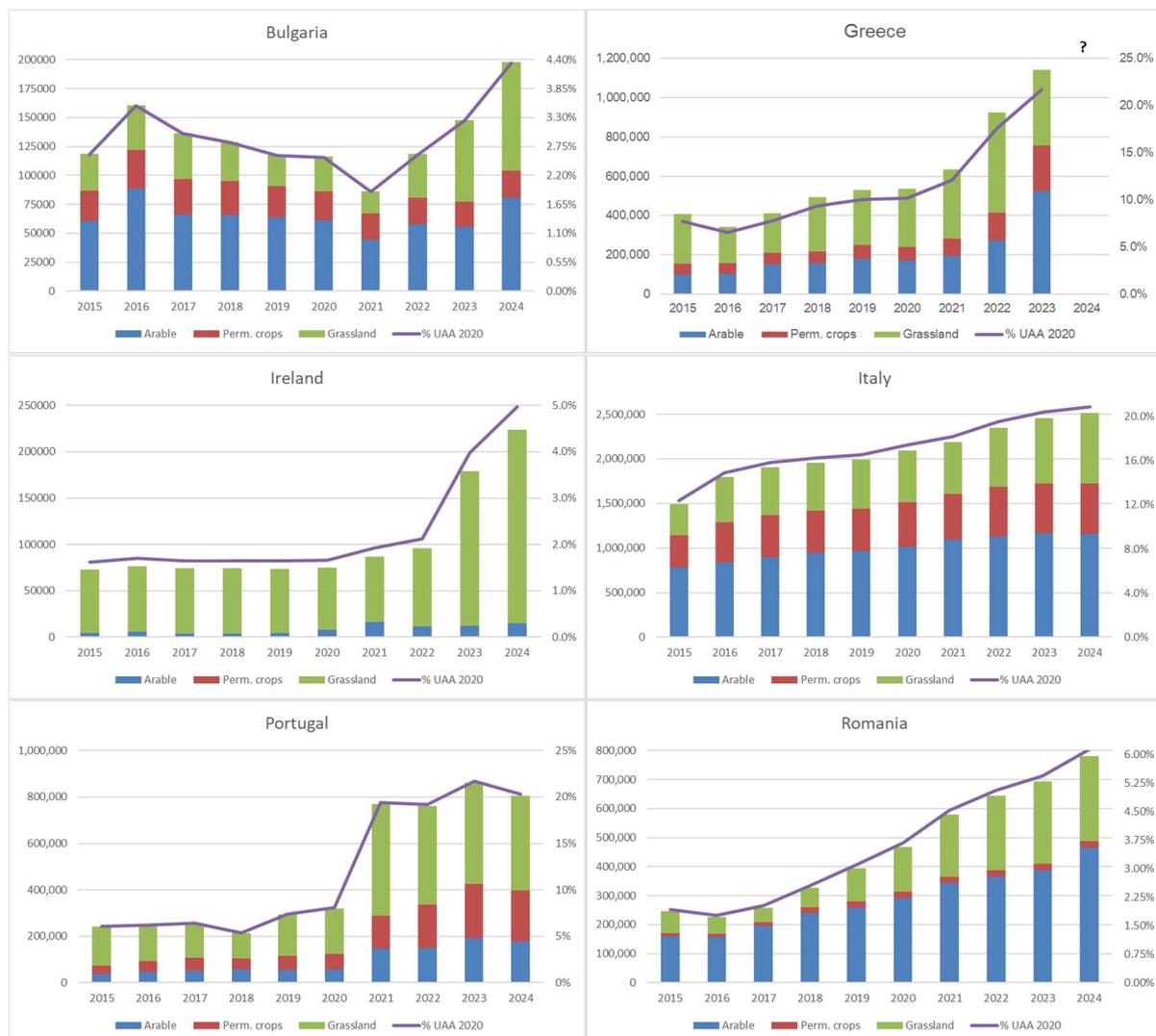


Figure 2.5: Organic land area (ha) and share (%) of 2020 UAA in faster growth countries: Bulgaria, Greece, Ireland, Italy, Portugal, Romania

Source: own representation of data from Eurostat and FiBL Statistics

<sup>12</sup> <https://www.slu.se/om-slu/organisation/framtidsplattformar/slu-future-food/temasidor/livsmedelsberedskap/beredskap-inom-ekologisk-produktion/> (accessed 29.01.26)

As it seemed important to understand why organic farming was continuing to grow strongly in some countries while others were stagnating, interviews with national experts in these countries were undertaken. These are summarised here on a country-by-country basis.

## Bulgaria

Bulgaria experienced relatively rapid growth between 2011 and 2016, under the last but one CAP programming period (2007-2013), but saw a decline during the 2014-2022 period, with growth returning at the end. By 2024, almost 200,000 ha (4.3% of UAA) were in conversion or fully organic. As the 8<sup>th</sup> largest country in the EU in terms of total agricultural area, Bulgaria has the potential to make a significant contribution to meeting the EU's 25% target. From 2021, environmentalist gains in national elections contributed to a change in approach to organic farming. Payments for organic arable and grassland were substantially increased from 2023. The introduction of a Pillar 1 eco-scheme payment for organic animals with annual agreements enabled farmers renting land to participate, as they had not been able to commit to 5-year agreements. Farmers may have been influenced to consider organic farming as an alternative by drought years, with irrigation from the Danube sometimes limited, and by higher fertiliser prices following the Ukraine invasion. Conversely, farmers had been deterred from conversion by the requirement that payment recipients had to provide evidence of sales to organic markets (product lots listed on organic certificates). If this could not be evidenced, then the payments received had to be repaid. These rules have since been modified to address the most severe circumstances. Legislation has also been introduced requiring an increasing annual share of public procurement, starting at 1% and increasing by 1 percentage point annually. 18% of the school food scheme is now also organic. In the short term much of this demand is being met by imports, but there is a belief that Bulgarian producers will be able to substitute the imports in due course. In terms of information, opportunities for technical, environmental and business advice and training are still limited, but a key issue has been to raise producer awareness of and confidence in organic farming as such, and significant progress has been made in this context.

## Greece

Greece has experienced steady growth since 2002, but with particularly rapid growth since 2022, reaching 22% of UAA in 2023. More than 110,000 farmers were certified organic, up from less than 40,000 in 2021. The reasons for this rapid growth are unclear, particularly as they may also be related to serious problems with fraudulent support payments currently being investigated by the European Commission (see below).

While arable conversion payments were increased by 200% in 2023, 10-25% increases were more typical for other organic payments (Lampkin et al. 2024). Domestic market demand is not a significant driver. Reliable data on market size is not available—retail sales value estimates of around €65 million have persisted since 2008 and owe more to lack of data than to evidence of a stagnant market. Anecdotally, there is some increasing demand from larger retail outlets, but at the expense of smaller specialist stores, and there is increasing demand from hospitality catering. The Ministry has initiated 'some projects for developing markets and enhancing public awareness in the cities. Some export markets exist for products such as olive oil, feta cheese, wine, fruit and vegetables. The marketing options are most developed by horticultural producers. It seems unlikely that many of the producers currently converting will engage with the market when they complete conversion. The policy support with its environmental focus appears to be the key driver.

Part of the explanation also lies in a shift to Pillar 1 support for organic maintenance as an eco-scheme, which contrasts with the five-year commitment for the Pillar 2 organic conversion scheme. In 2023 and 2024, very extensive farmers could qualify for the organic farming eco-scheme maintenance payments immediately, providing easy access, even though technically still in conversion, and there were no implications for livestock. Most of the land classified as grassland is common land (mainly rough

grazing or scrubland) with low stocking rates and very few inputs. The easy access may have been politically expedient, allowing farmers to make up loss of direct payments via the organic eco-scheme. However, the sudden influx of producers with no previous engagement with organic farming has left some in the traditional organic sector questioning whether the certification process has become too light touch.

A further factor in the Greek context is common (grazing) land, which has been the subject of a process to allocate shares to individual producers to enable them to claim support payments and to qualify for organic certification. Data from Eurostat analysed by us suggest that if only land with identified ownership is considered, the organic arable and permanent crops areas may be only half those currently certified, and only 15% of the permanent grassland currently certified would qualify. This land allocation process is currently the subject of legal action by the European Commission<sup>13</sup> and it is uncertain what impact this will have on agricultural support in general and organic certification and support in particular. In late 2025, the Ministry moved to suspend 2024 organic conversion support payments due to concerns that 'an overwhelming percentage' did not comply with the criteria for funding<sup>14</sup>.

Industry sources report that in 2024, the conversion scheme was modified to a three-year scheme, with stricter eligibility criteria applied and many applicants rejected. Pillar 2 support for organic livestock was also stopped from 2024. From 2025, access to organic eco-scheme payments was restricted to fully converted farms only, leading to some of the farms still in conversion based on eco-scheme payment either continuing without support, or stopping to be organic.

Even without these problems, a key concern with such expansion rates is the availability of advice, training, research and other information resources to support farmers during the conversion process and subsequently. While it appears that advisory support is generally available, particularly since 2023, it is likely that it is focused more on completing support applications, including organic certification as a means to this end. It is unclear whether market development, and the necessary specialist organic information support services, can keep pace with the changes, and whether large numbers of producers abandoning organic certification might be a consequence. There is anecdotal evidence for this taking place already in 2025, but no data is yet available. Although an action plan was launched in 2021 to address some of these issues, its existence and content is not widely known among stakeholders, and we were not able to obtain a copy from the Ministry despite repeated requests.

## Ireland

Ireland, like Bulgaria and Romania, has started from a low but stable base, with just 1.5% of UAA organic in 2020. Between 2022 and 2024, more than 4000 farms converted. 90% of the farms converting were grassland-based cattle and sheep producers, with larger farms converting following reductions in minimum stocking rate requirements. Younger and women farmers have above average representation. The expansion to 5% of UAA in 2023, and the likely further expansion to 10% by 2030, as targeted in the Climate Strategy, can be attributed primarily to policy changes introduced by the last government with cross party support<sup>15</sup> see Box 1 below).

Apart from the increased support payments, a key factor influencing farmers was the 2-3-fold increase in fertiliser prices following the Ukraine invasion. Until recently, conventional beef prices had remained

<sup>13</sup> <https://www.politico.eu/article/eu-greece-400m-fine-farm-aid-debacle-scandal-agriculture-farmers-courts-fraud/> (accessed 29.01.26)

<sup>14</sup> <https://www.ekathimerini.com/economy/1282806/bio-farming-subsidies-are-canceled/>  
<https://www.ekathimerini.com/economy/1283484/brussels-unaware-of-move-to-stop-organic-farm-funds/> (accessed 29.01.26)

<sup>15</sup> <https://www.gov.ie/en/department-of-agriculture-food-and-the-marine/publications/organic-farming/> (accessed 29.01.26)

low, making conventional beef production unprofitable, but significant increases in 2024 may slow conversion rates. They may also help farmers who have converted without access to organic markets, although the requirement to use organic feedstuffs at premium prices could lead to some reconversion. Conversion rates have for dairy farmers have been low due to lack of processor interest and the availability of higher conventional prices to offset higher costs.

### Box 1: New and improved organic policy initiatives in Ireland since 2022

- 60-200% higher conversion and maintenance payments from 2023, with funding maintained under Pillar 2 and priority for organic entrants. The organic schemes are now open every year, not sporadically as before, avoiding stop-start problems
- Some restrictions on combinations with ACRES agri-environmental measures have been removed, but combinations are still difficult due to double-funding deductions—eco-scheme combinations are good options.
- Financial support to farmers for administrative, advice and training costs (€1,400 per year, €2,000 in first year of conversion)
- Organic farm capital investment scheme, with 60% instead of 40% grant aid up to €90,000, and organic processing grants also increased to 60%
- Support for the formation of organic producer organisations
- Establishment of dedicated organic farming unit in Department of Agriculture, led by an established organic farmer
- New organic strategy forum established in 2023 and a new national organic strategy for 2024-2030 (Target: €750 million output wholesale value by 2030)—a 10% of UAA goal is included in the Climate Strategy, and there is also a 10% of public procurement goal
- Increased staff resources in the research and advisory organisation Teagasc (four core advisers covering dairy, beef, sheep and horticulture, supported by regional advisers)
- Support of private Agricultural Consultants Network, including dedicated organic person and upskilling of organic advisers, although funding ended in 2025
- New organic research projects targeting beef, sheep and horticulture (supply continuity, nutrient supply), but limited focus on dairy and arable (except milling cereals, pulses)
- National organic training programme offering wide variety of mainly introductory courses, with all farmers converting required to attend organic principles course offered by the National Organic Training Skillsnet (NOTS)<sup>16</sup> and Teagasc
- In 2025, additional funding was allocated to NOTS for an Organic Academy to provide specialised, business-focused training, technical expertise, and market development support to farmers, processors, and advisors
- The certification organisations are also involved with various information initiatives including field talks, podcasts, farming media engagement and videos for advisors
- The marketing organisation Bord Bia had a person dedicated to organic market development leading consumer information campaigns and export initiatives, with €22 million funding from 2024;
- Promotion activities aimed at consumers, including social and broadcast media actions, with a new call for 2025-2027 (€3 million over three years).

As many converting producers are now reaching full organic status, the issue of how the market will adapt is seen as critical. Market development is a key focus for the new organic strategy, given that much of the organic products sold in Irish supermarkets are imported, and given the potential for exports, especially for red meat and aquaculture products. There is growing interest in horticulture

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<sup>16</sup> NOTS also provides training on conservation and regenerative agriculture, which has pros and cons, as these approaches are a potential stepping stone to organic

because demand is there, but with many small growers there are continuity of supply issues. Leakage of organic cattle and sheep into conventional markets is also a significant concern, although product availability may be critical for new market entrants if the sector is to grow.

There are some concerns in other parts of the industry about the high profile that organic farming has been receiving. Farming media have raised issues about reductions in livestock numbers, with consequent loss of quality breeding suckler cows, and the lack of a market for organic products. This is also reflected in current radio advertising campaigns advocating 'buy organic to support organic farmers' rather than for environmental benefits that might be seen as critical of conventional farmers. Scepticism exists about organic farming's capacity to deliver on farming incomes, GHG emissions and other environmental factors—more work is needed on some of these issues. But in general, organic farming is more accepted than it was in the past.

Following the change of government at the end of 2024, there is some uncertainty about whether the policies for organic farming and the environment will be maintained. However, the organic farming brief has been assigned to senior minister Martin Hayden, rather than a junior minister as previously, and he has engaged with the organic forum, so some continuity is anticipated. Expenditure on organic support is running ahead of budget, so possibly exceeding the €256 million allocated in the CAP strategic plan. Funding for conversion in 2025 may be more restricted, with a focus on arable and dairy farmers, due to the large number of beef cattle and sheep farms that have converted so far.

### Portugal

Portugal experienced a first peak in land area under organic management in 2006, followed by a period of slow but steady growth, until a sudden more than doubling of area in 2021 from 8% to 19% of UAA (Figure 2.5). Since then, the organic area share increased to 22% of UAA in 2023. What has happened since is unclear. Data available from Eurostat and FiBL Statistics indicated a decline in 2024, as shown in Figure 2.5), whereas the Portuguese National Organic Observatory<sup>17</sup> data indicate further increases in 2025.

The land area share is well in excess of the 12% of UAA targeted in 2017 for 2027. Although recent growth rates and shares of agricultural areas have been similar, the circumstances in Portugal are not the same as those in Greece. Organic conversion and maintenance payments in Portugal hardly changed in 2023 compared with 2019 (Lampkin et al., 2024). A key change has been annual availability of new agreements, previously new agreements were only available every three years—in 2015, 2018 and 2021—leading to log-jam issues as farmers delayed conversion waiting for the new schemes to open. The change to Pillar 1 funding from 2023 made annual calls easier to implement. However, following the rapid increases in 2023, 2024 and 2025, the scheme is being closed again until 2027. The sudden growth in 2021 was stimulated also by the Next Generation Covid Recovery fund (Recovery and Resilience Plan<sup>18</sup>), targeting new entrants to agriculture with priority given to organic farming during the transition between the previous and current CAP programming periods. This has resulted in an increase in the proportion of permanent crops to 20% of organic area, and the proportion of grassland and fodder crops falling from 70% to 50%, more like the proportion in agriculture in general. The success of this initiative is linked to the government at the time, with more recent governments seeking to restrict public expenditure.

High fertiliser prices, low market prices, and the increased autonomy under organic management were factors influencing producers converting. Information on conversion is provided by organic sector organisations funded by the government. Training courses are also provided by the organic sector, but funds available for training are not utilised due to the complexity of the application process. Further

<sup>17</sup> <https://producaobiologica.pt/> (accessed 29.01.26)

<sup>18</sup> See page 152 in: <https://recuperarportugal.gov.pt/wp-content/uploads/2021/10/PRR.pdf> (accessed 29.01.26)

actions are envisaged in the action plan, which is overseen by the National Observatory for Organic Production's steering group. However, this group was meeting four times annually, and has only met once in 2025, and interest in delivering the action plan appears to have diminished.

Increased consumer demand was also relevant in the Portuguese context. Covid had increased awareness of food and farming issues, with purchases driven by health and environmental concerns, led by women, young people and people with health problems. Currently, 90% of organic sales are in supermarkets, much of which is imported and non-seasonal. There are three main centres of demand, Faro, Lisbon and Porto, but these are distant from the main organic production areas in the northeast. For meat, there is also a problem of the distance from producers to slaughterhouses. Organising market functioning is one of the big challenges, as there is a need to find better marketing solutions for small and medium farmers with more seasonal products. 85% of farmers are small or medium sized, while the organic average is 24 ha, for conventional farms the average is only 5 ha. Bio-districts are emerging as an important idea—now in nine regions with local authorities involved, linking food for schools, tourism, gastronomy, hotels and local markets. Group certification could also be a solution, but it needs an alternative approach for administration.

## Conclusion

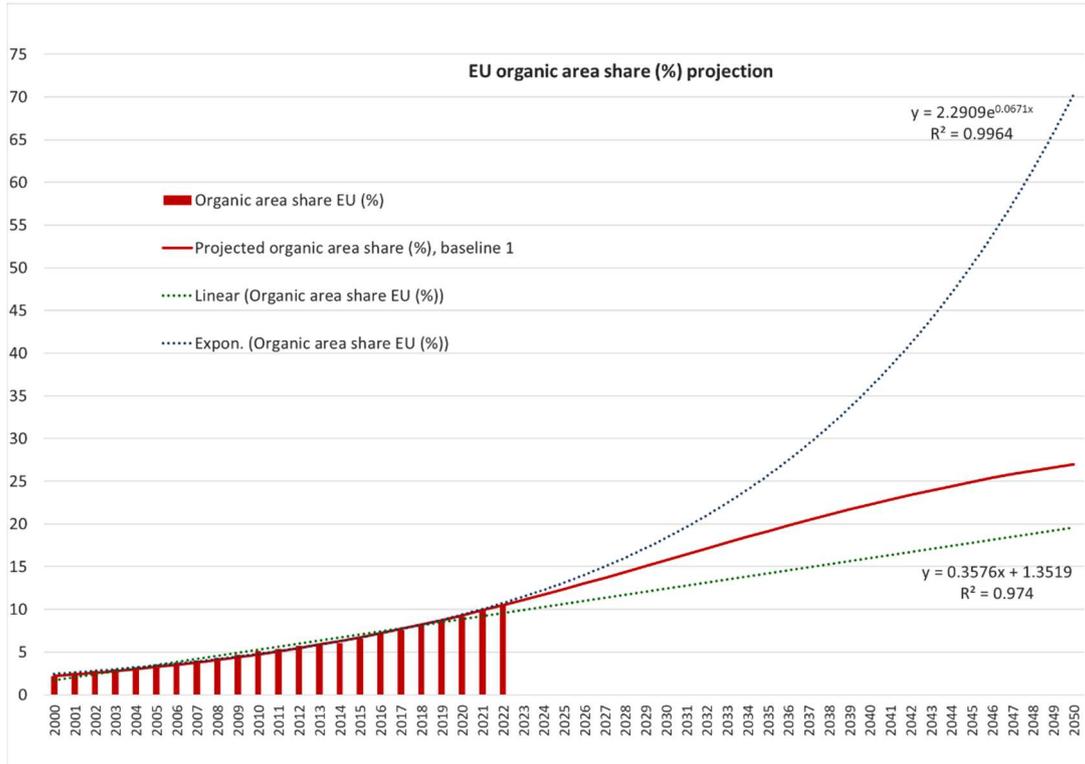
Further information on these issues is provided in the D1.2 and D5.2 reports, with the latter considering recent changes in the focus countries. The country factsheets on the project website show longer time series trends going back in some cases to 1985 and illustrate how in individual countries periods of rapid growth may be followed by slower growth or decline and then renewed rapid growth. As a result, it is very difficult to predict when growth rates in individual countries or at an EU level might slow down permanently as the sector reaches saturation point. But it is clear from the experience in faster growth countries that growth can be driven by effective policy engagement, particularly if supported by a variety of information and market development services as in Ireland, and that reliance on market drivers primarily may not yield results if conditions are difficult, as for example in France. At the same time, too rapid growth, as seen for example in Greece and Portugal, could be followed by a decline or crash, if not appropriately supported by other measures. In this context well-designed and actively support action plans can play an important role. These themes are developed further in later chapters of this report.

### 2.1.2 Modelled organic growth projections

As part of the OrganicTargets4EU project, the modelling tool CAPRI was used to assess the production, economic and environmental implications of 25% organic land area in the EU (Curtiss et al. 2025). CAPRI in its current form does not directly model organic systems, but constraints like fertiliser and pesticide use, stocking rates and cropping can be set to mimic organic farming. In order to have a more differentiated approach to reflect the different scenarios, based on major land use categories and NUTS2 regions, projections of organic farming growth were developed separately as an input into the CAPRI model. For this purpose, rather than the exponential or linear growth models illustrated in Figure 2.1 above, a logistic growth model was applied on the basis that at some point it would be realistic to expect growth to slow and eventually for a saturation point to be reached. The evidence concerning potential turning points or saturation levels is very limited at national level, not least because many countries have experienced a number of growth, consolidation and decline phases (see for example Country Factsheets<sup>19</sup> for Austria and Denmark).

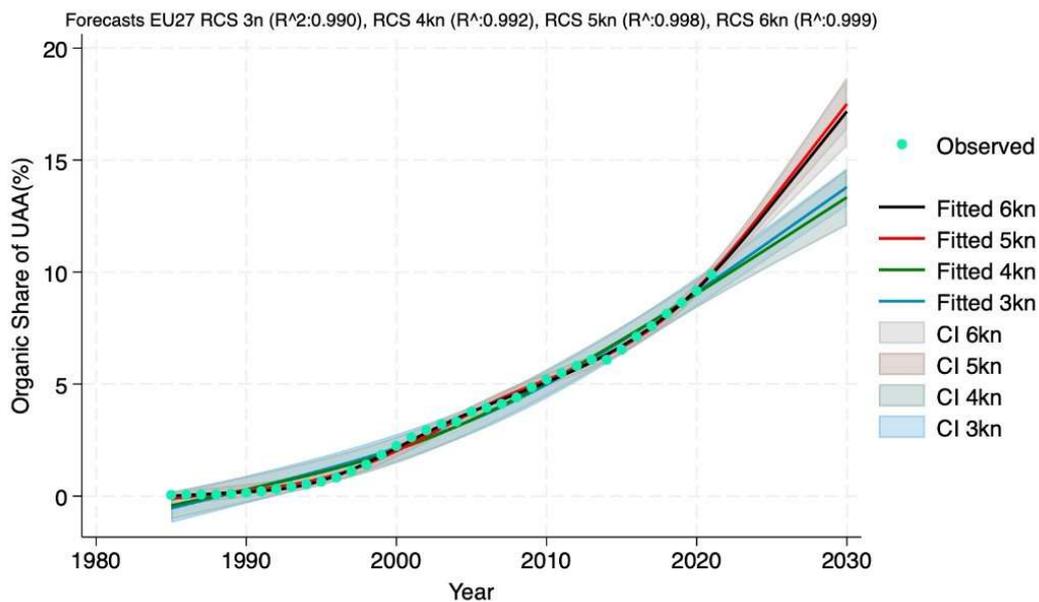
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<sup>19</sup> <https://organictargets.eu/organic-sector-factsheets/> (accessed 29.01.26)



**Figure 2.6: EU organic area share (% UAA) in 2000-2022 with EU-level Business as Usual trend projection (red line)**

Source: Curtiss et al., 2025



**Figure 2.7: EU organic area share (% UAA) in 1985-2022 with restricted cubic spline trends at different levels**

Source: Zanoli et al., (2026)

The derivation of a logistic model at EU level is described in detail by Curtiss et al. (2025). Based on historic trends, they conclude that a saturation level of 31% and a turning point (where growth rates start to slow) around 12% is possible (Figure 2.6). On this basis, 16% of UAA organic by 2030 could be achieved. To achieve 25%, a higher saturation level of 40% would be required, which was used as the basis for the organic scenario projections in the CAPRI modelling.

These results are consistent with the trend impact analysis models prepared as part of the Foresight and Scenario Analysis work package (Zanoli et al, 2026)). In this case, trends based on historic data back to 1985 were used with four different restricted cubic spline functions to reflect increasing trend complexity and non-linearity, resulting in a range of outcomes between 12 and 18% organic share of UAA by 2030 (Figure 2.7).

### 2.1.3 Target achievability

The simple fitting of linear or exponential trends to historical organic land area data (Figure 2.1) and the more complex modelling approaches used in different parts of the project (Figures 2.6 and 2.7) tell a similar story—it is unlikely on the basis of current policy, market and economic circumstances that the 25% share of UAA target can be achieved by 2030 and it might take a further 5-10 years to come close to it. The straight-line extrapolation based on the last CAP programming period 2014-2022 (business as usual) (Figure 2.1) suggests that 15% of EU UAA may be organic by 2030, with the 25% target only being reached in 2050. On the basis of the linear growth trends, there would need to be a near doubling in growth rates for the target to be achieved, which seems unlikely, particularly given the slowdown in growth rates in leading countries since 2022.

We conclude from the available data and models that 15-18% might be achievable by 2030, but that there is scope to achieve more if there are substantial policy and market developments to drive faster change. These projections are supported by:

- 11% UAA reached in 2024, six years after the target was set and with six years still to go.
- Up to 1 million ha (0.6% UAA) being converted annually (though much less in 2024).
- Member States in their CAP strategic plans allocating resources for 10% of UAA to be supported as organic by 2027—allowing for about 1/3rd of EU organic land not receiving policy support, this is equivalent to about 15% of UAA certified as organic or in-conversion.
- MS organic action plans and targets by 2027/2030 equivalent to 18% of UAA, which is compatible with the exponential growth projection and the upper bounds in Figure 2.7.

Achieving 25% UAA by 2030 is only possible with a near doubling of the linear growth trend or a faster than exponential growth increase. This would require growth rates more like those currently being experienced in Portugal and other faster growth countries, and significant additional investment in policy support, but is not impossible.

### 2.1.4 Impacts of achieving the 25% target

In Work Package 2 (Foresight Scenarios), four scenarios for the future development of organic farming were developed, covering the period to 2040 under the assumption that 25% would be reached in 2030:

- **Green public policy:** Continuing to build on and strengthen the Green Deal approach in all EU countries with environmental outcomes a core focus, as in the current CAP 2023-2027.
- **Divergent pathways:** Due to political instability, EU unity is weakened, and individual member states pursue different economic and environmental outcomes—this might be a consequence of the recently published proposals for the next CAP period (2028-2034, see Chapter 1).
- **Organic on every table:** Organic expansion is driven more by market demand building on the Green Deal policy baseline, with retailers and other market actors playing a key role.

- **Power to the people:** Policy support and commercial drivers are lacking, but popular interest in food, health and environmental issues drive citizen led campaigns for more organic food.

The implications of these scenarios were assessed using:

- **Backcasting** (WP2)(Zanoli et al. 2026) to identify what actions are required to achieve a given endpoint, discussed further below in the context of individual policy themes (primarily Action Plans in Chapter 10); and
- **Modelling** (WP3) at EU level (CAPRI)(Curtiss et al. 2025) and in focus countries (IDDRI)(Schiavo 2025a) to assess production, economic, social and environmental impacts of reaching 25%. In both cases, business as usual (BAU) scenarios were also used as comparators. In the CAPRI case, BAU growth based on the previous CAP programming period (2014-2020, extended to 2022) would not achieve the 25% target, but was projected to achieve 15% UAA by 2030.

### EU-wide CAPRI modelling

The CAPRI modelling (Curtiss et al. 2026) concluded that the organic area shares in individual countries would still vary widely, from ca. 10% to 40%, under the difference scenarios. In the Green Public Policy (GPP) scenario, strengthened policy support generates broadly distributed growth and reduces disparities. Countries with currently low organic shares, including several in Eastern and Southern Europe, show the strongest acceleration. The structure of organic land use shifts from 51% to 63% arable, from 39% to 29% grassland and from 10% to 9% permanent crops. In the Organic on Every Table (OET) scenario, rising consumer demand, expanded organic value chains, and stronger emphasis on arable land conversion, drive rapid expansion in market-responsive Member States and arable-land dominant regions. This favours countries in Central Europe (including Czechia, Slovakia and Slovenia) and the Baltic States resulting in more pronounced cross-country differences and higher organic area concentration in regions where market development is feasible and represents significant potential for organic expansion. The structure of organic land use shifts from 51% to 65% arable and from 39% to 24% grassland, with permanent crops unchanged at 10%. In the DPW scenario, uneven policy ambition, heterogenous market development, and diverging institutional capacities produce the most contrasting outcomes. Some countries reach levels above 35–40%, while others, particularly those with weaker administrative capacity or low domestic demand (mainly Eastern European Member States), see only marginal increases. The structure of organic land use shifts less than in the other scenarios from 51% to 61% arable, from 39% to 29% grassland and from 10% to 11% permanent crops. Well-established organic hubs in Austria, Scandinavia, and parts of Southern Europe remain strong across all scenarios. However, the extent and location of catch-up growth vary considerably. Regions with favourable agronomic conditions, stronger policy incentives, or expanding domestic markets show significant increases, whereas regions constrained by structural factors, such as limited processing infrastructure or low public procurement performance, exhibit slower or stagnant growth.

The CAPRI simulations suggest that achieving 25% organic area induces meaningful but manageable structural adjustments in EU agriculture. Reductions in mineral fertiliser use of around 40–50% (100% of synthetic nitrogen fertiliser) in converted areas, substantial declines in synthetic pesticide use, and imposed rotation and stocking constraints collectively lead to moderate yield reductions—particularly in cereals, oilseeds, and row crops. Aggregate agricultural production falls relative to the CAPRI Baseline, though the magnitude of the decline differs across scenarios and regions from 2.7% to 3.1%. Impacts are most pronounced in arable-dominated regions, where lower input intensity directly affects yields, cropping patterns, and profitability. Adjustments are smaller in regions dominated by extensive grassland systems, where current practices already align more closely with organic requirements and stocking density restrictions bind less strongly. In several Central and Northern European regions, increased reliance on fodder legumes alters feed availability and livestock composition, contributing to modest reductions in cattle and dairy intensity. Farm income declines moderately at EU level, though with substantial regional variation. We were not able to account for organic support payments and

premium prices in the modelling, but the farm income reductions estimated at 2-5% overall, or €250-600/ha could potentially be offset if organic support payments and prices could be maintained.

Across all scenarios, expanding organic farming delivers consistent and policy-relevant environmental gains. These improvements stem from substantial reductions in synthetic inputs (nitrogen fertilisers and pesticides) and shifts toward more diverse and extensive production systems. Nitrogen surpluses fell by more than 10-20% and pesticide total active substances by 30-40% in regions characterised by intensive arable production. Agricultural greenhouse gas emissions were estimated to fall by around 2–5% relative to the baseline, corresponding to an absolute reduction of 15–30 Mt CO<sub>2</sub>e, or 150–300 kg CO<sub>2</sub>e per ha land converted. The biodiversity-friendly farming practice index would increase by 3–4.7%, or 33–36% on the land that converts to organic, with the highest gains in arable-dominated regions. These results underline the importance of spatially differentiated policy design, as environmental effectiveness depends not only on the scale of organic expansion but also on its geographical allocation and underlying land-use structure.

### IDDRI national sector modelling

The IDDRI modelling (Schiavo 2025b) focused on specific organic sectors in individual countries, analysing the structural characteristics of both current and future organic and conventional farms, under two of the scenarios Organic on Every Table (OET) and Green Public Policy (GPP) for agriculture and Weak EU and Green and Fair scenarios for aquaculture. The report considers eight case studies: the dairy sector in France, the broiler sector in France and Denmark, the arable sector in Austria and Romania, the outdoor vegetable sector in Hungary, the wine sector in Italy, and the aquaculture sector in the EU. The methodology combines qualitative and quantitative approaches to develop both current and future farm typologies. Initial farm types were identified through expert workshops and interviews with farmers, industry representatives, NGOs, and policymakers conducted by the practice partners in the project. These insights were then linked to statistical data from the Farm Accountancy Data Network (FADN) and the Farm Structure Survey (FSS). Future farm typologies were developed by exploring possible sectoral evolutions up to 2035. Experts assessed which farm types are likely to transition, the structural changes required, and the probability of conversion to organic farming. A modelling simulator, functioning as an input-output calculator, was used to quantify socioeconomic impacts. Indicators such as the number of agricultural jobs, farm size, livestock concentration, income levels and other structural changes at the farm level were estimated.

The study reveals that organic farms are generally more labour-intensive than conventional farms due to their smaller size, additional farming operations, and alternative marketing channels. This highlights the need for policies that support labour management and workforce expansion, particularly for family-run farms that may resist hiring external labour. Several trends determining future organic farm types were identified, including the development of larger organic farms with economies of scale, highly specialised organic farms focusing on direct sales, and organic livestock farms with enhanced animal welfare standards. Additionally, the integration of crop and livestock activities and the use of Integrated Multi-Trophic Aquaculture (IMTA) in organic aquaculture were noted as potential strategies for sectoral growth. The organic expansion varies by region and sector, with the livestock sector presenting greater challenges due to higher price differentials and shifting dietary trends. Moreover, the location of organic expansion plays a crucial role, as some regions may require more tailored policy measures based on existing farm structures and economic conditions.

The results suggest that, in most case studies, expanding organic farming increases agricultural employment and the number of farms compared to the business-as-usual scenario. This effect is most pronounced in the livestock sector, whereas arable case studies show more moderate increases due to smaller differences in farm size and labour intensity between conventional and organic farms. However, despite these increases, overall farm numbers are still projected to decline with respect to

the current situation due to structural trends such as farm concentration, specialisation, and productivity improvements. Policymakers should anticipate this decline and support alternative rural employment opportunities such as agritourism, direct sales, and value-added processing. Financially, organic farming appears viable in many cases, with income per family farm worker often comparable to or, in some instances, exceeding that of conventional farms. However, this outcome varies depending on farm type, regional conditions, and market dynamics. Even when considering depreciation schedules where path dependence on previous investments is stricter, organic conversion can be financially attractive, though the degree of profitability depends on external factors such as price premiums, subsidies, and production efficiency. Some emerging organic farm types show the potential for higher profitability than current organic farms, indicating that targeted public policies could play a key role in facilitating economically sustainable transitions. Future policies should carefully consider the diversity of organic farm structures, supporting investment in organic farming innovations, enhancing value chain integration, and providing tailored incentives to improve the financial viability of organic farms across different sectors.

Overall, the modelling work indicates that the output and financial impacts of achieving the 25% targets could be modest and may be compensated by policy support and premium markets, although it was not possible to model the market impacts directly. The environmental impacts with respect to input use, biodiversity friendly farming practices and greenhouse gas emissions are potentially substantial.

### 2.1.5 How valuable are targets?

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, with six years and a new CAP programming period to go, potentially with refreshed EU and national organic action plans.
- Aspirational targets, even if not achievable, have an important motivational and signposting role, as can be seen from the current CAP Strategic plans and MS national targets. The existence of the EU target and organic action plan acted as an important motivator for some governments to introduce or significantly increase policy support for organic farming, and to set their own ambitious targets, in the context of the CAP SP negotiations.
- 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 to keep the focus on core policy impacts, as suggested in the European Court of Auditors review of EU organic farming policy (ECA 2024). 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 the organic sector.

Earlier work on organic action plans (Meredith et al. 2018) highlighted the importance of top-level objectives or targets to provide direction for policy implementation. These should be placed in the context of wider (non-organic) policy objectives, thus reflecting how organic sector development can contribute to general economic policy goals related to food and agriculture as well as wider social, environmental and health policy goals.

From the experience of previous organic action plans, at least three types of top-level objectives or aims should be considered:

- Organic sector development (growth, competitiveness and sustainability);
- Economic and rural development (broader agriculture, food and economic policy goals, including meeting consumer demand for organic food, where the expectation is that growth and improvement of the organic sector will make a positive contribution, e.g., creation of employment, economic growth and regenerating rural communities);
- Environmental, public health and other societal benefits (delivery of public goods as a result of organic land management and organic food consumption).

From a policymaker's perspective, the development of the organic sector is more a means to an end in pursuit of economic and societal level aims, not an end, whereas organic sector stakeholders are more likely (but not exclusively) to see the development of the organic sector as an end in itself. Reconciling the interests of different stakeholder groups is central to the development of organic action plans.

These conclusions are reinforced by the outcomes (Proceedings and Charter) from the Danish Organic Summit held in August 2025 (Anon 2025). Achieving the 2030 organic targets will be challenging, but they remain important as guiding benchmarks. Future policies should combine land area goals with environmental and market targets, with a stronger focus on rewarding measurable environmental outcomes. Successful organic transitions require aligned policies, sector capacity, and market initiatives. Denmark's example shows how embedding organic into broader agendas (climate, jobs, welfare) and creating active action plans can deliver systemic change, supported by public procurement goals, national cuisine labels, and retail partnerships.

## 2.2 Policy recommendations

Good progress is being made towards the 25% target, with up to 12% of EU UAA possible in 2025. Based on our projections, 15-18% is achievable by 2030. 25% may take 5-10 years longer to achieve. The growth is consistent with member state targets set out in national CAP strategic plans and organic action plans, with these targets averaging 18% in 2030. Difficult market conditions have slowed rates of conversion in countries with mature organic sectors (e.g., AT, BE, DE, DK, ES, FI, FR and SE) while growth has been more rapid in countries with small organic sectors or limited domestic markets/high export dependency (e.g., BG, GR, HR, IE, PT, RO). Ambitious targets have a strong sign-posting and motivational role, which had a positive impact on the status of organic farming in CAP strategic plans for 2023-2027. But realistic plans are also required to ensure targets are achievable and adequately resourced.

Even if at EU level the future focus is more on emphasising the sustainable growth of the organic sector rather than vigorously pursuing the 25% target, we recommend that the EU Commission should:

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

- Requesting member states to report in the near future on plans to upgrade their organic policy measures for 2026 and 2027 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 instead of 2030



- Preparing an updated EU level organic action plan as a basis for providing guidance to national governments and supporting mechanisms for sharing best practice in organic policy making, utilising the EU CAP Network where appropriate
- Using the recommendations in this report as a basis for providing specific guidance and recommendations to individual member states with respect to different policy options and their integration in revised organic action plans for the 2028-2034 period

**Encourage national governments to continue to set meaningful land area, environmental and market targets for the development of organic food and farming by 2035 and beyond, as part of national CAP, NRP and organic action plans, which:**

- Define clear policy ambition and direction
- 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 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
- Are supported by improvements in statistical data collection and reporting

## 3 Organic area payments

Organic area payments, providing support for conversion to and maintenance of organic production practices, were first introduced into EU law and widely adopted by Member States as part of the agri-environmental accompanying measures implemented in the 1994-1999 CAP programming period (Reg. 2078/92; Lampkin et al. 1999). The introduction of the policy was made possible by the EU-wide legal definition of organic farming implemented in 1992 (Reg. 2092/91).

The basic principles of a five-year conversion support scheme, which accounted for the changes in land use and stocking, reduced input use and yields, and lack of access to premium prices during the legal conversion period, have remained in place until the current programming period (Lampkin and Sanders 2022; Lampkin et al. 2024). In some cases, capital investment requirements were also included. In the case of maintenance payments, farmers are already organic, but have the option of reverting to conventional production, potentially resulting in the loss of environmental gains during conversion and subsequently delivered on an ongoing basis. Maintenance payments are therefore paid to ensure continued delivery of the environmental benefits. This was also normally as a five-year scheme but following the introduction of the organic eco-scheme option under Pillar 1 from 2023, annual agreements are also possible. The calculation of conversion and maintenance payments is based on the income forgone and additional costs incurred approach, with certification costs sometimes seen as a transaction cost given the role of certification in agreement validation. Combinations with other Pillar 1 eco-schemes and Pillar 2 environment schemes can be made, subject to double-funding deductions where relevant.

### 3.1 Specific policy context and project results

#### 3.1.1 Project results

Our research in WP1 with the respect to the current CAP programming period (2023-2027) (Lampkin et al. 2024) and the comparisons with previous work on the last programming period (2014-2000, extended to 2022) (Lampkin & Sanders, 2022), found that, despite a common legislative framework, there was a high degree of variability between member states in scheme structures, eligibility conditions, payment levels and combinability with other environmental measures. This applied to both conversion and maintenance payments.

While some differences are understandable in a structural and geographical context, for example in countries with small farm sizes such as Romania and Austria compared with countries with larger farms, and in hill/mountain compared with lowland farms, other differences may be more questionable. For example, some countries like Germany normally require whole farm conversions while others permit part-farm conversions. Some countries focus payments on major land use categories such as arable, horticulture and grassland, while others differentiate payments by individual crops and livestock types, with the risk of introducing market distortions. Some countries implement lower payments for larger farms (degression) or cap total payments or land area supported, even though arguably the costs of organic management are likely to be similar on all land converted.

The calculation of payment rates is also inconsistent, with limited transparency concerning the methods adopted, apart from the guidance (measure fiches) given in earlier programming periods on issues such as the inclusion of organic premium prices. In one extreme historical case, only certification costs were considered to be costs of organic maintenance, whereas in most countries, the opportunity costs of not reverting to conventional were considered relevant, as the decision to be organic or not is voluntary. Where organic premium prices are considered, it is not clear how these prices are derived and whether all producers are expected to be able to access them, particularly if

some are not able to access organic markets and receive no premium at all. The costs associated with developing and accessing organic markets are often not considered. The inclusion of premium price assumptions reduces the level of support compared with non-organic farmers undertaking similar commitments, potentially making the organic options appear less attractive. Even if the costs of organic management can be fully and fairly reflected, the full cost may not be covered by support payments, as policymakers can implement intervention rates lower than 100%.

In some countries, not all organic land is eligible for support. In 2018 only 65% of the EU certified area received organic support payments. In the CAP strategic plans for 2023-2027, 10% of EU agricultural area was budgeted to be supported as organic by 2027, which would be equivalent to about 15% of agricultural area certified on this basis. The restriction of support only to whole farm applications may be one factor. In some cases, restrictions may relate to extensive grass or scrubland, in others that specific combinations with other environmental schemes were not permitted, and priority was given to the alternative schemes. In some cases, established organic farms converting additional land could not receive support for the extra land, in others, gaps in scheme openings for new entrants, or early closure of schemes due to lack of funding, resulted in farmers converting without support or in logjams of producers waiting to convert until schemes reopened.

While the maintenance payments are meant to be made in recognition of ongoing delivery of environmental benefits from organic management, the issues to do with their calculation mean that the payments do not directly reflect value of the environmental outputs delivered, or any additional benefits that may be generated on individual farms. The achievement of organic certification is a pass/fail determination that certain conditions in the organic regulations have been met. While this embodies environmental benefits relating to zero or very restricted use of nitrogen fertilisers, chemically-synthesised pesticides, GMOs, antimicrobials and sewage sludge as well as more diverse rotations and reduced livestock stocking rates (Sanders and Hess 2019; Sanders et al. 2025), it does not recognise the contribution of producers who do more than the minimum required to achieve certification.

The reasons for individual Member States choosing Pillar 1 or Pillar 2 by as a funding basis for organic support in the current CAP programming period are unclear, in particular with respect to environmental and market outcomes. The issue of national co-financing of Pillar 2 support when Pillar 1 is 100% EU-financed may be relevant, but many countries chose to continue using Pillar 2 agri-environment climate funds. One factor in this may have been concerns that farmers should make longer-term commitments to organic management, and that annual agreements were less desirable in this context. From the farmer's perspective, shorter term agreements (Sanders and Hess 2019) can make responding to difficult market situations easier, with lower risk of penalties for early withdrawal from agreements. At the same time, the payment rates for Pillar 1 eco-schemes can vary from year to year, with payment rates being reduced if interest in participation is higher than planned. In some cases, where organic support was integrated in the same eco-schemes with other measures, as in France and the Netherlands, higher than expected interest in the non-organic components could still lead to reductions in the organic payments. However, payment reductions have in some cases been restored in subsequent years.

Organic conversion payments are normally intended to be higher than maintenance payments, reflecting the additional costs and income forgone during the conversion period. However, the payments available often do not fully reflect the additional costs during the conversion period, which may include:

- lack of access to organic premium prices during the official 2-year (annual crops) or 3-year (perennial crops) conversion period (some livestock enterprises might take even longer);
- higher yield reductions during the conversion period;
- sunk costs, e.g., for livestock buildings or other investments no longer usable in organic systems;

- increased costs for breeding livestock, building and machinery investments as farming systems are restructured;
- training, advisory and other information costs linked to the conversion period;
- market development costs to access organic prices when the conversion is completed.

Learning, information and related costs are often not considered as additional costs, with exceptions in some case such as Ireland (see Chapter 2). As organic production methods, and the establishment of organic systems, may require new knowledge and experience—with conversion a learning process (Padel, 2001), even a trial-and-error approach can be associated with costs if mistakes are made. The risks of these costs can be reduced with conversion planning, advice and training support, but these services have their own costs, some of which may be met from other funding sources.

Many MS provide no additional support during conversion, or a limited 10% or 20% (or a fixed €150) uplift on maintenance payments, while some apply reduced intervention rates to reduce conversion payments and make them less attractive to farmers seeking subsidies who might decide at the end of the initial five-year commitment to revert to conventional production (Lampkin et al. 2024).

Organic certification is normally accepted for validation of scheme eligibility. This is attractive to scheme administrators, as it is usually undertaken by third parties in compliance with EU organic regulations, and is relatively simple to administer compared with the requirements of some other agri-environment-climate measures. As such, the costs of certification can be seen as transaction costs relating to scheme participation, even though they are also necessary to be able to market products as organic and qualify for premium prices. This leads to some variability in their treatment between Member States.

A related issue is the expectation in some administrations that products should be marketed as organic in order for the areas supported to be eligible. While in previous programming periods, the requirement for organic agreement holders to be active farmers has been specified, the requirement to market products as organic has not. If products are sold on conventional markets, the environmental benefits from the production process are still being generated, which is the primary purpose of the organic support payments. In addition, by not marketing the products as organic, the producer may be forgoing the premium prices that have been used to calculate the support payment. The lack of appropriate market outlets, or the costs of developing new ones, may outweigh the organic price advantage. This illustrates the challenge that policymakers face ensuring coherence between production, market and environmental goals.

There is significant potential for synergies between organic farming and more targeted environmental measures, but combining organic support with other environmental schemes is complicated due to concerns of paying farmers twice for doing the same things. Some MSs exclude any such while others permit combinations, but with double funding deductions. In at least one case, farmers are required to choose the alternative no-pesticide option, with a reduction in organic support on that land. This may result in missed opportunities for combinations where synergies could deliver added benefits, excessive support deductions, or a disincentive for farmers to take up organic support as alternatives are more attractive. For example, double funding deductions could be reduced or eliminated by:

- Tailoring additional measures to fit baseline organic support requirements
- Careful consideration of which requirements of organic regulations have been included in the income-forgone calculations
- Recognising that during conversion, farmers are going through a change process and have not achieved a final organic state, even if compliant with the organic regulations, so that double funding implications may be reduced compared with fully established organic systems
- Recognising unfunded costs where intervention rates are below 100%, especially in the context of conversion

### 3.1.2 Other related research

The organic farming support payments have been subject of a number of previous studies since they were introduced on a widespread basis in the EU in 1994. The EU-funded OFCAP project (1996-1999) evaluated the first programming period following their introduction (Lampkin et al. 1999; Dabbert et al. 2003). Already in this first phase, the need to balance supply-push organic area support payments with other demand-pull measures, to ensure that the increase in supply did not damage the emerging organic markets, was identified. The project also conceptualised the 'duality' of organic farming, delivering both public goods and market outcomes. The results of this project fed into the first EU Organic Action Plan (EC 2004).

In a follow-up EU-funded project (EU-CEEOPF, 2003-2006), linked to EU expansion with many central and eastern European countries joining the EU with nascent organic sectors, the challenges of supporting conversion in the absence of a good information base, and of balancing export-led and domestic marketing initiatives, became more pronounced. In an overview of organic farming policy, including legal, financial, communicative and integrative instruments, Stolze and Lampkin (2009) highlighted the emerging tensions from both the growth of organic production and markets, and the institutionalisation of regulation and policies, contrasting with the roots of the organic movement in earlier decades. Questions concerning how underlying organic values, including environmental, health and sustainability goals, could be emphasised in the face of commercial and other pressures were raised. A key solution was the need for strong stakeholder engagement in policymaking, including regulations, support payments and action plans. At the same time, it was recognised that EU policy goals with respect to the environment were increasingly converging with those of the organic movement, providing opportunities of coherent and synergistic policy development.

More recently, the European Court of Auditor's report on organic farming policy (ECA, 2024) raised some key questions about the focus on land area targets and support payments without taking sufficient account of environmental and market considerations. There was a lack of adequate data to evaluate policy outcomes, and inconsistencies in policy and regulatory implementation in different member states could undermine the expected delivery of environmental and market outcomes. The ECA recommended that the Commission should:

- strengthen the EU strategic framework for the development of organic sector, establishing a way to measure progress and setting a vision beyond 2030;
- better integrate environmental and market objectives into CAP support and better target post-2027 funds to develop the organic sector;
- ensure the availability of relevant data to assess the development of organic farming and its impact on environment and climate by using existing tools and information more effectively.

The appropriateness of organic farming as a measure for agri-environmental policy has also been the subject of much research and debate. In general, organic farming has demonstrated a range of environmental benefits, from soil conservation, water quality, greenhouse gas emission reductions to biodiversity enhancements, with a range of specific studies and meta-analyses (e.g., Sanders et al. 2025) reviewing these issues. These typically conclude that organic farming overall performs better on a per unit land area basis, but that there is wide variability in the results from individual farms and studies, which reflect issues relating to location and farm type, as well as to the experience, skills and engagement of individual producers. While payments to meet the requirements of the organic regulations can deliver specific benefits, for example relating to the reduction of nitrogen fertiliser and pesticide use, there is significant scope for more to be achieved building on the organic certification baseline. Lampkin and Sanders (2025) discuss how an indicator-based approach to assessing environmental outcomes on individual farms might provide an alternative approach to rewarding the benefits of organic farming, an approach that might also be applicable to all farmers, reducing the

potential for friction between different parts of the farming community. Their approach is not the only model under discussion—a range of alternative options is considered in the same January 2026 issue of Eurochoices<sup>20</sup>.

### 3.1.3 Development needs, challenges, and policy options

There is clearly a need to review the basis for setting organic conversion and maintenance payment rates in order to:

- Better reflect environmental outcomes on individual farms
- Enable combinations with other environmental schemes to exploit synergies, avoiding heavy double funding penalties or automatic exclusion of combinations
- Reduce competition from other environmental schemes
- Better reflect actual costs of organic conversion and continuing production, including the need for transitional investments in advice, training, buildings, production technologies and marketing options including farm shops, on-farm processing and agritourism.
- Recognise higher organic prices as a return to entrepreneurial/marketing activities and related investments more than land management

In the context of the income-forgone calculations normally used for organic support payments, a marginal cost approach linked to the desired uptake of organic farming could be used to support higher payments. Where intervention rates are less than 100% of the calculated costs, or certain cost elements have not been included in the calculations, these should be considered as options for reducing the double-funding reductions.

Opportunities to make changes exist now, with the annual reviews of scheme requirements, and in the context of planning for the CAP after 2027. As highlighted in Chapter 1, the proposals for the CAP from 2028 (EU Commission 2025a) recognise organic farming as one of six key environmental priorities (Art. 4) and requirement member states to continuing implementing support payments for organic farming as an agri-environmental measure (Art. 10). There is also a proposal (Art. 10) for transition lump-sum funding to support conversion to organic farming, including investments in advice, training and capital expenditures, although how this will mesh with the organic farming support payments is as yet unclear. A key challenge, at least for some member states, is likely to be the cost of organic farming support, as the measures are now outside the scope of the 100% EU-funded degressive, area-based income support (DABIS), and therefore will require national co-financing typically at 30%. Those countries that shifted to using Pillar 1 eco-schemes to support organic farming in the 2023-2027 period might find it difficult to maintain support payments in the new framework. There have been some suggestions that a specific DABIS payment for organic farming could be implemented, based on the provisions for regional and farm-type differentiation of the payments. It is likely, however, that the degressive and capping components could undermine the adoption of organic farming on larger farms due to the land-related nature of many of the cost and income changes under organic management.

## 3.2 National perspectives

As part of the national workshops, for each theme participants were presented with some key findings from the project results, with associated development needs and policy challenges and options identified, as well as national perspectives prepared by the workshop organisers drawing on local knowledge and documentation including national support programmes and organic action plans. Development needs identified in earlier national workshops in the project could also be integrated. In

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<sup>20</sup> <https://onlinelibrary.wiley.com/toc/1746692x/2025/24/3>

this section, we summarise the key outcomes for each topic from the national workshops, based on the documentation provided by the workshop organisers.

### 3.2.1 Austria

Organic payment rates were reduced in 2023-2027 compared with the previous period, with no differentiation between conversion and maintenance payments as in previous periods, but a series of biodiversity and other top-ups can allow similar or higher total payments to be achieved. This modular design with combinations of organic and other environmental support possible, comes close to suggestions elsewhere that bundles of environmental schemes might be used as a basis for organic support.

In the national workshop, it was considered a high priority that increased organic support payments could only be successfully implemented in conjunction with the development of national (domestic) organic markets. Without this, there is a risk that higher payments, especially for conversion, will lead to reduced organic product prices in the medium term. The development of a purely export-oriented sector, without a domestic consumer market, as can be seen in some other countries should be avoided. The workshop participants estimate that production from 35% of organic land in Austria cannot currently be placed on the domestic market. From a market competition perspective, it is argued that the calculation of organic support payments should be based on the revenues and cost structures in each EU member state. Short-term (even annual with Pillar 1 funding) participation by farmers jumping in and out of organic support programmes could damage the credibility of organic farmers. For this reason, workshop participants argued for commitments in environmental support programmes of at least five years.

The payment calculation for organic area support should be understood as compensation for environmental outcomes. In this sense, the modular system should be further developed to permit as many opportunities as possible for organic support recipients to engage with additional environmental delivery. Some participants raised the inclusion of external costs in the calculation of an organic area payments, but there was no consensus on this.

In order to stop the trend towards abandoning animal husbandry, which is also present in organic farming, it is important that more differentiated support measures or top-ups are offered for organic animal husbandry, which reward the higher costs resulting from the organic requirements in animal husbandry.

A clear political commitment to strengthening and further developing organic farming is necessary. The provision of the necessary financial resources for support programmes at EU and national level is a basic prerequisite.

### 3.2.2 Denmark

The Danish organic policy enables opportunities for combinations of organic and other environmental measures, for example by integrating with eco-schemes. The Danish organic support payments under Pillar 1 are relatively low compared with other countries (Lampkin et al. 2024), and do not use a marginal cost approach to support higher payments to achieve growth targets or reduce or eliminate double funding deductions. From 2026, there are planned increases in the organic maintenance payment from 1,200 to 1,350 DKK/ha and for conversion from 1,600 to 1,800 DKK/ha. The organic payments can be combined with the grassland and diversified crop eco-schemes, but not the care of grasslands scheme in Pillar 2 or the extensification for biodiversity eco-schemes in Pillar 1. There is some tailoring of these additional national measures to fit baseline organic support requirements and consideration of which requirements of organic regulation have actually been included in costings. Concerns were expressed about subsidy dependency for organic producers, which undermines their autonomy and puts them at risk of political changes suddenly altering the basic conditions.

Workshop participants considered that more scientific research is needed to investigate the rewards of public goods like climate, biodiversity and nature/landscape. Organic Denmark<sup>21</sup> has proposed that climate and biodiversity eco-schemes could be designed to recognise the benefits from organic farming and replace dedicated organic support. A study has been made by the economic institute IFRO (part of Copenhagen university), to estimate if changes in support could be an incentive for conversion in the context of new taxes related to bog soil and methane from dairy, as well as subsidies related to drinking water, uplands, set aside, reduced fertiliser etc. Calculations have also been made about the consequences of increasing organic support, the environmental plans they interact or conflict with, and how organic farming support might work together with the new environmental plans of planting 240,000 ha of forest and taking 130,000 ha of peatland out of production (Pedersen 2020). Participants suggested that permanent funding of dedicated organic public research to support policy should be made available. This is currently done by universities with limited knowledge of organic practice.

### 3.2.3 France

In the French national workshop, it was emphasised that conversion and maintenance payments are particularly important in difficult economic contexts when organic price premiums are reduced due to difficult market conditions. The maintenance payments (MAB<sup>22</sup>) available in the previous programming period were discontinued nationally in 2018 but retained in some regions as regional initiatives until the end of 2025. From 2023, Pillar 1 organic eco-scheme payments were introduced, on a similar basis to maintenance payments in other EU states but with relatively low payments. The low interest in conversion since 2023 has resulted in large amounts of conversion support funds remaining unspent. Some of this has been diverted to other purposes, but the eco-scheme payments rates have been increased again following an initial reduction.

In addition, there is an organic tax credit (crédit d'impôt bio) of 4,500 €/year/farmer until 2028. In general, there is a reorientation by organic producers towards agri-environmental and climate measures (AEEM) or CAP eco-schemes, but these mechanisms are considered more restrictive, and often insufficient. Support is regionalized in France (as in Spain, Italy and Germany), which can lead to distortion of competition between regions with repercussions for the sector and product development.

In some cases, unfair competition can be observed from less demanding measures such as those for plant protection. Environmental services provided by organic farmers should be recognised more explicitly and the possibilities for combining organic measures with other environmental measures should be maximised.

It was mentioned that the conversion payments should provide higher incentives than partial measures such as pesticide reduction, especially in difficult market contexts. The need to avoid deconversion of farms was discussed. To ensure efficient use of public funds, it would be necessary to guarantee the long-term viability of organic farms, otherwise conversion subsidies would be a waste of money, as they would only enable a temporary switch to organic farming. One idea that has been put forward would be to offer extended subsidies, for example for 10 years instead of the current 5 years, but it has been pointed out that this would increase the costs of processing applications and may deter some.

There is a need to avoid opportunistic conversions stimulated only by policy support. Conversion support could be made conditional on participation in mandatory training courses. The idea would be

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<sup>21</sup> <https://organicdenmark.com/>

<sup>22</sup> The MAB maintenance payments were introduced in 2010 using Pillar 1 funding (Art. 68 EC Reg. 73/2009) with no requirement for national co-financing. From 2014, the altered regulations for organic support meant national co-financing was required, which was in part provided by the water agencies and regional governments. From 2023, Pillar 1 eco-scheme funding for organic maintenance in mainland France meant that once again, no co-financing was required. Conversion payments are supported as co-financed Pillar 2 schemes.

to reinforce the obligations, and to guide farmers to assess the needs of the market. To do this, it would also be necessary to better monitor market data (price observatories, volume analysis, etc.).

There is also a need to consider how the environmental benefits are identified, communicated and rewarded. This might also allow policies to address rewarding environmental benefits rather than taking a 'leave it to the market' approach. Farmers could then be seen as producing both market goods and public goods and earning a living from both. Concerns were raised that the market may be paying less than would otherwise be the case due to the existence of organic support payments, but economic analysis of this is lacking.

Risks of contamination by conventional inputs were also raised—at the moment the organic farmer pays if contaminated due to loss of organic status. An insurance or levy system might be relevant to address this but, for an insurance approach, what would be the trigger point? A levy system could also address diffuse pollution, for example in the case of water agencies.

An important discussion was also raised on succession: 10 out of 27 million hectares of agricultural land in France will change hands in the coming years! This major issue of generational renewal affects all farmers, including organic farmers.

Following the discussions, it was concluded (in order of priority) that:

- Conversion support should be increased and linked to regional policies for biodiversity, water, food etc.;
- A support system to reward the provision of public goods and environmental benefits (biodiversity, water, nitrogen reduction, climate, etc.) should be introduced, in particular via payment for ecosystem services, but also tax credits etc.;
- Support for setting up and/or transferring farms should be made available to facilitate access to land, develop environmental obligations (ORE)<sup>23</sup>, change status, with organic payments;
- Maximise possibilities for combinations of measures: support for organic farming and other environmental measures;
- Equalisation funds at territorial level to cover the risks associated with the transition and climatic and/or market hazards (risk pooling by coalitions of players; and funding by pollution charges, for example);
- Taxes on agricultural pollution to benefit organic farming as a priority.

### 3.2.4 Germany

In the German national workshop, concerns were expressed about lack of understanding of organic management requirements in the administrations, with the GAEC and Eco-scheme rules not appropriate for organic production. According to the IACS data (Duden et al, 2025) the uptake of eco-schemes by organic farmers is higher than average, in some case much higher, but the specific needs of organic producers are hardly considered in their design and implementation. The system-approach and holistic (Sanders and Hess 2019) outcomes need to be captured by the 'Green by Definition' concept.

The organic payments are impacted by double-funding considerations and regional differences. A single pillar for all land-based agricultural payments (income and environmental) and a stepped approach to payments for different production systems could provide a solution (BÖLW/IFOAM model)<sup>24</sup>. Various models for rewarding environmental outcomes at farm level could also be considered

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<sup>23</sup> The real environmental obligations (ORE) to which the owner of the property is bound under the "ORE" contract may be long-term, lasting up to 99 years.

<sup>24</sup> [https://www.boelw.de/fileadmin/user\\_upload/Dokumente/EU-Agrarpolitik/230606\\_GAP\\_Stufenmodell\\_Kurzfassung.pdf](https://www.boelw.de/fileadmin/user_upload/Dokumente/EU-Agrarpolitik/230606_GAP_Stufenmodell_Kurzfassung.pdf)

(LandInform special issue)<sup>25</sup>, potentially linked to the sustainability benchmarking initiatives promoted at EU-level (Strategic report). The European Court of Auditors report (ECA, 2024) identified the lack of statistical data needed to undertake environmental outcome assessments. Some aspects, such as biodiversity, are less directly covered by the EU organic regulations, but organic organisations such as Bioland and Naturland have developed their own standards to address this. Other public and private sector partners, such as the water agencies, could be involved in funding such outcomes, as is already happening in several parts of Germany (DWA 2025, Heider von Diepen, 2023), building on the clear evidence of water quality benefits from organic management of catchments (Sanders & Hess, 2019)

There is also an argument for a stronger application of the polluter-pays principle, for example using taxation of inputs with negative environmental impacts, rather than paying farmers for reducing their permitted environmental externalities.

This would be consistent with Measure 28 of the national action plan Biostrategie 2030 (BMEL 2023) calling for the CAP to more strongly reflect sustainability, environment and climate goals as well as organic farming. It might even be possible to generate baseline environmental outcomes at lower cost with organic farming, with its comprehensive regulatory framework, supported by top-ups to fill the gaps (Schader 2009). The 2025 federal government coalition agreement in contrast calls for the CAP to be less bureaucratic, more transparent and efficient, and more effective in terms of income support.

The federal approach in Germany, and the allocation of different functions to the federal and state administrations, complicates the implementation of CAP organic and environmental support. This exacerbates the challenge of finding and justifying the resources to fund increasing areas of organic farmland. A solution might be to provide maintenance support in the 1<sup>st</sup> Pillar as a federal scheme, with conversion support the responsibility of the Länder and their specific targets for organic area growth. It might then also be possible to achieve better integration of maintenance payments and eco-schemes, with organic support possibly also as a bundle of relevant eco-schemes.

The negotiations for the CAP from 2028 would provide the opportunity to explore and implement at least some of these options. This is important, as there has only been limited change in a more sustainable, environmental direction in the last 40 years.

### 3.2.5 Hungary

In the Hungarian national workshop, it was identified that one third of producers do not take advantage of the 5-year conversion/maintenance support schemes, preferring the alternative agri-environmental support, e.g., for grassland, as combinations are not permitted. The Hungarian authorities argue that combinations cannot be permitted to avoid double funding, as the eco-schemes are based on organic farming principles. Organic status may be an advantage in terms of investment support and the young farmer programme.

Fruit, vegetable and fibre/protein producers may also qualify for production-linked support (coupled payments) and be more attracted to the other agri-environmental options even if they are organic. However, only those with sufficient yields receive the coupled income support, and these minimum yield requirements are often unrealistic for organic producers. The payments should be brought closer to the reality for organic production, as there is currently no differentiation for organic and non-organic crops.

More efforts are required to train advisors with respect to the CAP support payments and options, including that organic farmers are not only eligible for conversion/maintenance support. This rigidity is also encouraged by parts of the organic movement.

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<sup>25</sup> [https://www.dvs-gap-netzwerk.de/fileadmin/Redaktion/Seiten/Service/Publikationen/LandInForm/LiF\\_Spezial/LiF-spezial\\_10.pdf](https://www.dvs-gap-netzwerk.de/fileadmin/Redaktion/Seiten/Service/Publikationen/LandInForm/LiF_Spezial/LiF-spezial_10.pdf)

There is a perception of a free-rider problem with some (many) producers qualifying for conversion/maintenance support without producing anything, despite the active farmer eligibility condition, as they lack the knowledge, technology or intention to do so. However, the number of producers in this situation is not known and cases described are anecdotal. For example, watermelons might only be produced until flowering, and not harvested, as the payment rate is sufficiently high to generate a good income. Workshop participants considered that all support payments should only be granted to producers who actually produce goods and have a role to play in the value chain, with support extended to the whole value chain,

Further suggestions included integrating carbon payments in the support programmes, addressing the issue of double funding, collecting farmers' opinions on the various support programmes and clarifying the range of financing/support options outside the CAP (e.g., the Hungarian National Bank's green investment programme). Are there particular policy opportunities (e.g., new CAP, new action plans) that should be considered?

Organic farming could also be supported in a more targeted manner reflecting environmental outcomes (compared with those farming more intensively) so that organic support is more clearly aimed at environmental gains rather than production.

### 3.2.6 Italy

In Italy, support for organic conversion is provided through Pillar 2, with combinations with Pillar 1 eco-schemes possible. More than €2.1 billion, or 5.8% of CAP resources in Italy, have been allocated to this support in 2023-2027. Support is also available for sectoral operational programmes for fruit and vegetables with 60% EU contribution for exclusively organic programmes, including advice on potatoes through producer organisations and restructuring and investment funding for wine. Financial support is available for first certification for fruit and vegetables, olive oil and olives, and for organic districts (bio-districts) using funds allocated by the regions and the AB development fund (Law 23/2022, art. 9). Support varies significantly between regions, due to differences in regional policies and the regions' ability to finance the sector. A highly bureaucratic payment system has historically added barriers to accessing support.

Overall, the presented state-of-the-art and development needs were considered as a good recap of the overall situation in Italy with its major issues and opportunities. However, some points were added mainly related to the accelerated future CAP presentation schedule (July 2025) and the various scenarios that are put on the table taking in consideration the Italian existing conditions. It is considered a critical timing phase described as very sensitive due to upcoming policy announcements and budget allocations. The policy proposals and their related debated points identified by the participants during the discussion of this topic are reported here in order of priority given by participants in the workshop:

- Abolish historical entitlements of per hectare payments
- Oppose the CAP simplification option excluding organics from conditionality
- Revise the per hectare metric linking support allocation to indicators measuring:
  - Multifunctionality (many, especially young, organic farmers have multifunctional farms)
  - labour intensity of agricultural practices (organic farming is more labour-intensive)
  - commitment to agroecological practices (the design and implementation of eco-schemes in CAP 2021-2027 has been a missed opportunity for organics)
- collaboration along the supply chain (current support organic support is not strongly/systematically tied up to organic supply chain development)
- Coupled land area payments: there is a need to better target area payments to reward the system-based approach and sustainable practices adopted by organic farmers as well as supply chain collaboration

- Support generational renewal including access to land for young farmers and linking young farmers with experienced retiring farmers planning for succession who can provide coaching/mentoring (there are many young farmers willing to start an organic farming business who cannot afford to buy or rent land, and a need to ensure land mobility and smooth transition of land and knowledge to next generations)
- Introduce in the CAP strategic plan alternative, more effective and fairer scoring mechanisms. There is unfair competition between organic farming measures ending up with situations where organic farmers (practising systems-approaches) can receive less environmental funding than conventional farmers combining several schemes, therefore better rewarding practices that are also standard practices under organic management, or deliver less than a system-based approach. There is a lack of comparative advantage for organic farmers, since conventional farmers can be remunerated equally—or sometimes even more, by adopting single practices that deliver fewer environmental benefits than the whole farm system approach of organic agriculture. As a result, organic farming measures are less attractive, and a number of organic and conventional farmers decide not to apply. ‘Easy’ public spending on organic farming measure is not to be taken for granted anymore as it was in the past (reported by a Regional Authority representative). Need to adequately reward organic farmers that adopt a management and system-based approach (as opposed to conventional farmers combining single measures) in order to make the measures more attractive and foster the uptake. Need to shift from the ‘income-forgone’ principle used to calculate organic payments.
- Reduce the administrative burden for organic farmers by simplifying the bureaucracy associated with organic farming measures that deters farmers from participating.
- Simplify the articulation of measures in the CAP Strategic Plan to facilitate public spending
- Creation of a strategic study group to support the drafting of the Country Strategic Plan (need for a new vision for and beyond the sector, and to better understand opportunities associated with a Single Fund delivery model)
- Introduce a Compensatory Indemnity for farmers operating in areas with natural constraints in connection with organic supply chain development and market access.

### 3.2.7 Romania

The current status description reflects the need to review and make operational the basic payment schemes. Farmers should be more encouraged to choose the alternative no pesticide option with opportunities for combination of schemes which should support investments in processing. The implementation of national plan for organic farming is needed, as well as the maintenance of payments. Organic certification should be at low administrative cost, but there are increased bureaucracy concerns, including the expectation of organic products for the market. The sanction system is prohibitive, and the costs of certification have increased significantly.

There is a need to review basis for setting payment rates in order to better reflect environmental outcomes on individual farms and better reflect actual costs of organic conversion and continuing production (as in Section 3.1 above). Combinations with other environmental schemes should be utilised to exploit synergies and reduce competition from other environmental schemes, for example by integrating with eco-schemes. The issue of combining organic support with other environmental schemes is still not clearly understood by farmers, which may result in missed opportunities. Better compatibility is needed between organic support payments and other interventions such as DR-02 (climate change P6.2), DR-09, DR. 10, DR-11 (payments for climate hazards in reported areas) and AFM (Environmental Fund Administration) support.

The inclusion of organic premium price assumptions reduces the level of support compared with non-organic farmers undertaking similar commitments, making the organic option appear less attractive,

and there are often no organic premium prices due to lack of market demand. There is a need to recognise higher organic prices as a return to entrepreneurial/marketing activities more than land management. The reintroduction of 5% VAT for organic products would support market development. Market development could also be supported by the introduction of new actions/regulations in national legislation on the marketing of organic products, including the adoption of EU best practices and the implementation of simplified measures supporting trade and production.

National organic action plans need to be better integrated with CAP strategy plans. The current plans are not sufficiently integrated.

### 3.3 European perspectives

#### 3.3.1 EU Commission interviews, Autumn 2025

Interviews were conducted in September and October 2025 with representatives from different units within the European Commission covering the different themes in this report. For this topic, a discussion was held with representatives from AGRI B.2 (Environmental Sustainability) and separately with AGRI B.4 (Organic). The B.2 unit is primarily focused on the implementation of CAP regulations and how the member states design their interventions, and less involved with organic regulations and growth data, which are the remit of AGRI B.4.

It was clarified at the outset that there was a difference between the planning targets set in the CAP strategic plans, and other targets set as political goals in national organic action plans, for example the EU 25% of UAA organic target by 2030 and the planned supported organic area averaging 10% of UAA in 2027. Similar discrepancies also occur at national level, for example in Germany with a national organic action plan target of 30% by 2030 and ca. 14% of UAA planned by 2027 in the CAP strategic plan, in part reflecting the priorities of individual Bundesländer.

Some uncertainties were expressed concerning the impacts of the EU organic targets on the status of organic farming in the CAP strategic plans. It was acknowledged that the Farm to Fork Strategy goals and the EU organic action plan were used as a basis for Commission desk officer advice to individual member states. It was also recognised that there is a difference between the certified and policy-supported organic areas at EU level and in individual member states. This is an issue also discussed in detail in the Deliverable 1.2 (Lampkin et al., 2024), where it was identified that about one-third of the certified organic area in the EU did not receive organic policy support, due to restrictions on eligibility (e.g., certain land uses, part-organic farms) and combinability with other agri-environment-climate measures. Extrapolating this proportion to the 10% EU UAA planned to be supported as organic in CAP strategic plans might imply 15% of EU UAA certified organic by 2027.

A key question emerging with respect to the plans for the CAP 2028-2034 is the proposed transition fund (Art. 10 b CAP Reg). The proposed transition lump-sum payment is intended to be an administratively simple approach to meeting specific costs during transition to organic farming, extensive livestock production or other extensive approaches such as regenerative agriculture. Up to €200.000 per farm could be available to cover investments in advice, training, machinery and buildings in the context of a transition action plan, and these could be applied for in a single process with short application forms. The payments may be made in instalments, e.g., beginning, middle and end. Full details of procedures are not yet finalised, including what level of regulatory definition of systems like regenerative might be required, and whether the lump-sum payment would be additional to the organic farming area payments from the outset or whether the compensation costs for the new extensive practices would be included. The Commission is open to suggestions about how this can be made to work in practice, but ultimately it will be for the member states to make their own specific proposals, including definitions of acceptable extensive systems.

The challenges of reconciling the environmental priorities for organic support in the proposed CAP regulation for 2028-2034 with the market priorities often highlighted by member states was briefly discussed. The Commission representatives considered the environmental case to be central. In some MS, the case is being made that organic support payments should be time-limited, or maintenance payments were withdrawn in the past, even if environmental benefits are continuing to be delivered, which seems to be more an indicator that the support is seen in practice as a market intervention. This might also be the case in countries that are paying much lower rates and are not seeing the same sort of growth that is happening in other countries. It might be appropriate to identify what is the minimum support level that is really needed to ensure growth is happening and that environmental outcomes are delivered.

This was to an extent acknowledged by some of the Commission representatives, who argued that some member states had emphasised conversion support more than maintenance, assuming once farmers converted the market would take over their remuneration and they would stay organic indefinitely. Facts have shown that this is not always the case, and a different emphasis on maintenance support might have yielded better results. Given that the price premiums paid by consumers are falling (in some contexts), the ability of the market to pay for the extra efforts is also reduced. As a result, the argument that the market will pay for the maintenance of organic farmers after conversion is unsustainable. The case that the market premium price is a return to the investment in marketing and entrepreneurial activity that the farmers undertake, rather than paying for the environmental benefits that are being delivered, may be consistent with this (see below). This will, however, be more an issue for the member states, with greater freedom of choice but more constrained budgets, so that support for organic farming could come under pressure.

The Commission representatives emphasised the need to consider the organic area support payments alongside other support, such as for advice and training, or investment aids on-farm or in processing and marketing, that is perhaps less visible as organic support in the CAP strategic plans. Such support can prioritise organic investments, through relevant selection criteria and higher percentage support rates. However, these are not detailed in the CAP strategic plans and are more a fine-tuning instrument for the monitoring committees. Such support measures are considered in other parts of this report, and in the context of organic action plans to achieve better policy integration. However, the project funding nature of much of this support, and the absence of statistical data on funding and outcomes, as highlighted by the ECA report on organic farming, makes it difficult to assess the relative benefits (see also Chapter 8).

Another aspect about the organic support payments discussed was the issue of avoiding unintended impacts on market development. The inclusion of premium prices in the income forgone calculation does not usually include the costs of developing the marketing channels in order to obtain those premiums. As a result, costs may be understated and income overstated. There is case that premium prices should be excluded from the calculations and seen as return to the marketing investments undertaken, not the organic management practices that generate environmental benefits. From the Commission side, it was clarified the ability of the Commission to provide explicit guidance is now more limited, Member states are obliged to make sure that the costings are fair, accurate and transparent and undertaken by an independent body, separate from the one responsible for policy implementation. Higher prices as well as lower yields for organic could still be relevant, but it was recognised that higher prices are not guaranteed. Higher support payments for conversion are intended to reflect lack of access to organic premium prices, although in many countries there is no differentiation. In principle, member states are free to include the costs of market access in their calculations, if they can be quantified. Ultimately, budget constraints will also influence the level of payments made, and they need to be WTO Green Box compatible despite the desirability of including an incentive element. Given the

freedom that member states now have, there could be benefits in sharing good practice on costings, in the context of EU CAP Network.

A further aspect that impacts on markets is that some member states do not fund new agreements every year, with a 2–3-year gap between successive calls, or they run out of funds and stop new agreements. This can result in a logjam of producers waiting to convert until support payments are again available, which leads to boom-and-bust impacts on supply and market development. The administration of policy support needs to create a stable context for market development and to avoid stop-start situations. Is there anything that can be done to ensure consistency of availability of support over the programming period? This is very much in the hands of the member states and their budget planning. If they run out of funds, there is little that the Commission can do.

### 3.4 Conference debates

#### 3.4.1 Organic Summit, Copenhagen, August 2025

The Organic Summit (Anon 2025) was held as part of the Danish Presidency of the European Union and brought together organic sector stakeholders and policymakers from many countries. Many of the themes and policy recommendations discussed during this conference, including those featured in the Conference Charter and the Session summaries, are relevant to the work in the OrganicTargets4EU project and are therefore considered in some detail here. The role of the food industry and supply chains featured strongly in the discussions and conclusions of the conference and were reflected in the conference Charter reflecting the organic sector's contribution to sustainability goals and rural employment.

The Organic Summit concluded that there was need for better targeted farm support, adjusted to create stronger incentives for organic farming, ensuring it is both economically and practically viable for farmers to convert. Policies and financial support should facilitate farmers' transition to organic methods, taking externalities into consideration, recognising the variety and extent of environmental and other public good benefits from organic farming. There is a need to enable farmers to deliver both market and public goods. Rules should be simplified to make legislation and support schemes simpler and more stable, so conventional farmers dare to take the step without drowning in bureaucracy. There is a need to standardise across member states what can be considered public goods, so conditions are transparent and aligned. Political and public commitment should be enhanced by using data actively to demonstrate climate and environmental gains, with clear political will and communication demonstrated to maintain momentum.

There is a need to recognise that in some countries, organic farmers are facing lower incomes than their conventional peers, creating risks of reconversion, especially during generational transitions. Rising costs and slow market growth put the sector's viability at risk. Organic farming is built on environmental protection, biodiversity, and natural processes, but long-term survival depends on maintaining and strengthening consumer trust in the organic label. Current rules are often seen as inflexible and administratively burdensome. Simplification and better adaptation to farm realities are needed to reduce pressure on producers.

The issue of degressivity in the proposed future CAP area-based income support (DABIS) was also discussed. In many countries, organic farmers are larger than non-organic, so potentially will be more severely affected. This should not apply to the organic support payments, given the environmental focus. But speakers highlighted that the income forgone/additional cost model was not sufficient as a basis for calculating payments—the delivery of ecosystem services needs to be income generating.

### 3.4.2 Final OrganicTargets4EU project conference, Brussels, November 2025

At the final conference of the OrganicTargets4EU project, an international audience of stakeholders and policymakers heard about some of the results of the project and a summarised version of the emerging policy recommendations. In a World Café exercise, participants had the opportunity to reflect on the policy recommendation and to identify specific priorities and additional considerations.

With respect to specifying, quantifying and rewarding, environmental outcomes, comments were made that organic farming is more than environmental delivery—health and nutrition are important, and there is a need to produce a marketable product. In some countries, support payments were the main driver, with large farms converting and not necessarily producing anything. Existing support payments should be defended, using stronger arguments such as well-controlled certified systems and acknowledging the difficulties of proving some benefits such as biodiversity. It was important also to ensure that the rewards for being organic were fair and proportional relative to conventional. Additional measures could include:

- Risk protection (climate, markets—including spray drift and GMO contamination)
- Mandatory training for new agreements (as in Portugal and Ireland)
- Some governments are less interested environmental issues—in these cases a social focus on family farms and the regional economy may be more important to emphasise
- Some farmers want to live without subsidies—believing that this brings greater certainty

## 3.5 Policy recommendations

Organic conversion and maintenance payments have been a core part of EU support for organic farming since 1994 and are set to account for 5% of CAP expenditure in the 2023-2027 programming period. They play a key role in compensating the costs of conversion, as well as of continued organic production, effectively recognising the ongoing delivery of environmental public goods as well as marketable products. The proposals for the next CAP (2028-2034) recognise this by defining organic farming as an environmental priority, including deemed compliance with protective practices for soil and water protection, and reintegration of organic maintenance payments as a mandatory agri-environment-climate measure. Transition planning and support for conversion is also foreseen. At the same time, there is concern that the co-financing requirement could lead to reduced levels and/or availability of support, particularly in countries that had adopted Pillar 1 eco-schemes as a support mechanism in the 2023-2027 CAP.

In reviewing their current support payments, and preparing the support measures from 2028, Member States should focus on environmental outcomes whilst considering the organic market context and supporting the next generation of farmers.

### Strengthen the focus on rewarding environmental outcomes from organic farming by:

- Defining and quantifying the environmental outcomes anticipated from organic production, as distinct from other production methods/systems, for example as part of sustainability benchmarking initiatives—good quality data is needed for this.
- Developing support schemes that link payments to the extent of environmental outcomes delivered—potential models for this exist and can be developed further.
- Identifying the minimum support levels necessary to encourage organic growth and encouraging MS to go beyond the minimum, i.e., to be ambitious
- Enabling effective combinations with other environmental measures to top-up delivery, to avoid unnecessary double-funding deductions and to avoid disruptive competition between schemes.

- Determining regional, land use and farm size payment differentiation on the basis of anticipated environmental outcomes, not other factors that might be market-distorting.
- Engaging with water agencies and other organisations with climate and biodiversity interests to develop partnership approaches to rewarding the environmental outcomes.

As an agri-environmental measure, organic farming has a unique position, with its strong market focus and certified, system-based approach, legally defined under EU law. An appropriate balance between public good and market delivery and between policy and market drivers needs to be achieved to make the most of the opportunities. In the context of agri-environment-climate support, we recommend that:

**Consider the market context and impacts of organic support payments need to minimise negative impacts, by:**

- Providing a stable support base that can allow market development to take place in response to market signals
- Excluding organic premium prices from income forgone calculations in recognition of the costs involved in developing organic marketing channels and the role of premium prices as a reward for this entrepreneurial activity
- Avoiding support payment variability, for example for individual crops and livestock species, that can be market distorting
- Avoiding administrative and budgetary disruption to the availability of support payments that can lead to gaps in provision and stop-start signals to farmers considering conversion—for example multi-year gaps between scheme calls
- Avoiding requirements to market products as organic to qualify for payments
- Avoiding modification of payments to manage supply and demand, as these may undermine market signals and may not be timely given policy-making delays and conversion time lags.

The experience in many countries and particularly in Portugal, which has seen very rapid growth since 2021, is that organic farming can be very appealing to new entrants and young farmers. In the context of the Generational Renewal Strategy, we recommend that:

**Prioritise organic farming as an option for new entrants and young farmers, by:**

- highlighting the opportunities and the potential environmental and market benefits, and encouraging MS to prioritise organic farming in this context
- supporting potential organic producers with getting access to land, including making publicly owned land available on a preferential basis
- ensuring that the starter-packs and other resources made available by MS appropriately address organic farming as an option

## 4 Supply chain development

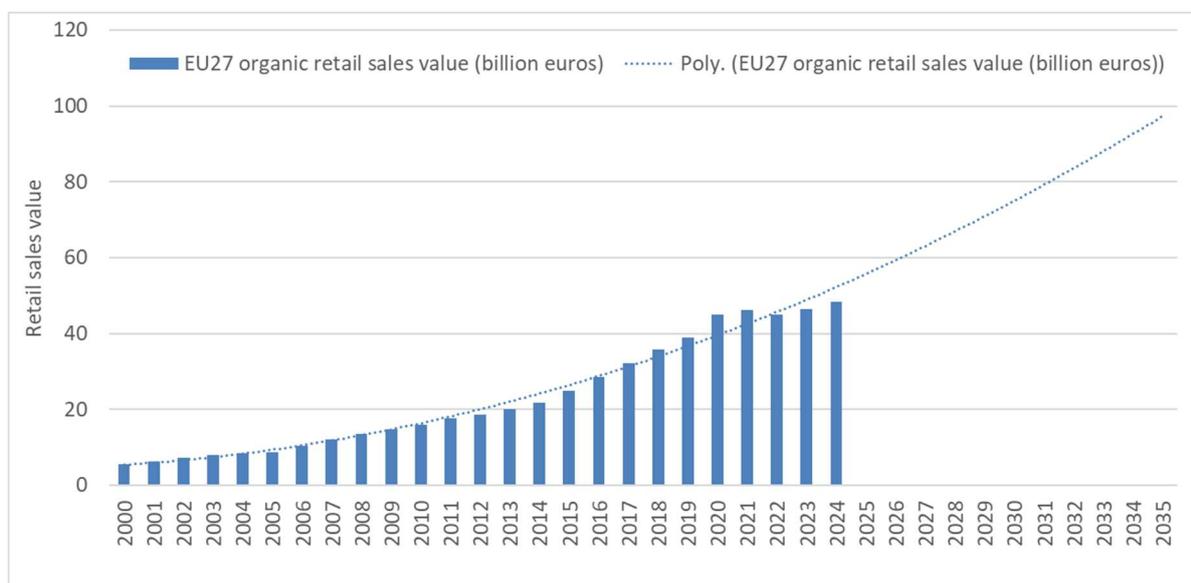
This topic covers the whole supply chain from input suppliers to consumers with all stages and alternative marketing channels in between.

Specialist organic markets have been an important driver for the growth of organic food and farming, with a wide range of processing and trade businesses involved, from traditional co-operatives, wholesalers, packers, processors, importers, exporters and retailers. More recently public and hospitality catering, gastronomy, hotels and agritourism are playing an increasing role. In some countries, regional organic initiatives, or bio-districts<sup>26</sup>, are mentioned as of growing importance.

### 4.1 Project results and policy context

The retail sales value of organic products in the EU reached €46.5 billion (G) in 2023, up 2.9% since 2022 (2001: 6 G€) (Figure 4.1), representing a trebling every decade since 2000. This was generated by 35 thousand (k) certified producers (2001: 144k), 89k certified processors (2001: 19k) and nearly 7k certified importers (2001: 1k) (Willer et al. 2025).

In 2022 and 2023, market growth was disrupted due to the pandemic aftermath, with consumers reverting to pre-pandemic patterns of out-of-home consumption and reduced on-line purchases. Food price inflation resulting from the Russian invasion of Ukraine also contributed to reduced growth in demand. Since 2023, retail sales values have been recovering, initially in value terms, more recently also in volume terms. If the polynomial expansion projected in Figure 4.1 is sustained, a doubling in retail sales value by 2030 is conceivable.



**Figure 4.1: Retail sales value (G€) of the EU organic market, 2000-2024 and polynomial projection to 2035.**

Source: Own compilation based on Willer et al., 2025 and previous years.

<sup>26</sup> Bio-districts are territories where farmers, citizens, local authorities and other stakeholders form an alliance for the sustainable management of local resources. They strengthen rural communities by linking food production, local markets, culture, tourism and education. They are powerful tools to deliver on sustainability, biodiversity and resilience in practice. [http://gaod.online/wp-content/uploads/2023/05/Organic\\_Districts\\_Introduction\\_Tool\\_Kit.pdf](http://gaod.online/wp-content/uploads/2023/05/Organic_Districts_Introduction_Tool_Kit.pdf) (accessed 26.01.26)

The EU CAP, CMO and Rural Development programmes provide support for:

- Producer organisations, including organic, but sector specific (e.g., fruits & vegetables), not generic covering the whole organic spectrum
- On-farm and supply chain investment aids, including in some MS prioritisation of organic projects, and higher percentage grant contributions
- Public procurement and out-of-home catering
- The proposed transition lumpsum payment for the CAP 2028-2034 could also provide funds for market development for new converters

#### 4.1.1 Project results

As part of the project, a **two stage Delphi survey** was conducted with processors, retailers, consultants and other actors, including from out-of-home catering. Participants were encouraged to project themselves into a 2030 timeframe but this was considered difficult and the influence of the current economic situation and difficulties in organic farming in some EU countries were strong (Cisowski and Serre 2024). This study highlighted that retail structures for organic food vary widely between member states. For example, Austria is highly focused (>80%) on a few multiple retailers, while Czechia is more reliant (>60%) on alternative outlets including online sales, specialist organic shops and out-of-home catering (see Cisowski and Serre, 2024, Figure 6). The Delphi survey identified a number of core themes to help build the market:

- Raising consumer awareness of the benefits and improving the affordability of organic food (see Chapter 5)
- Increasing product-innovation and extending the range of products available
- Raising the profile/visibility of organic products in sales strategies
- Increasing the share of organic food in out-of-home catering
- Expanding the choice of market focus: local, national, European, global
- Improving collaboration in supply chains/food systems, including integrated supply chains, short distribution channels and supply contracts for producers.

In a **second study on supply chains** as part of the project (Schiavo 2025a) modelled the impacts of organic value chains for specific sectors in individual countries: the chicken meat sectors in France and Denmark and the dairy sector in France. A mix of quantitative and qualitative data sources were used, including expert interviews and workshops, to forecast likely changes in the structure of these sectors, both organic and non-organic variants, by 2030. A simulation model was developed, based on an input-output framework, which estimated the impacts of variations in raw livestock production (animals entering slaughterhouses or milk delivered to dairies), determined in earlier parts of the OrganicTargets4EU project, on indicators such as the value added, the annual capital depreciation, the number of workers, the number of food processors, and the stranded assets in the sector. The models were analysed in the context of two scenarios favourable to organic production, *Organic on Every Table* and *Green Public Policy*, as well as in a business-as usual scenario called Reference (see Zanoli et al. 2026 for more details).

In the French chicken meat industry, both the *Organic on Every Table* and *Green Public Policy* scenarios help mitigate job losses resulting from a decline in meat production. The Organic on Every Table scenario achieves this through a higher level of processing in organic poultry, while the Green Public Policy scenario benefits from small labour-intensive firms by increasing the share of production processed by them. In contrast, the Organic in Every Table scenario in Denmark also helps reduce job losses by increasing the processing of organic poultry, but the Green Public Policy scenario fails to have a similar impact due to its emphasis on smaller but highly automatised firms. In the French dairy industry, the Green Public Policy scenario emerges as the most effective in mitigating job losses, as it

supports smaller, more labour-intensive firms, while the Organic in Every Table scenario does not result in increased processing of milk, limiting its potential to counterbalance job losses.

Additionally, the report emphasises that on-farm processing in both the poultry and dairy industries can provide high value-added output and create employment opportunities at the farm level, helping to mitigate the decline in the number of farmers. However, this shift towards on-farm processing can lead to reduced job requirements at professional slaughterhouses and dairies, necessitating public welfare measures such as financial support, professional retraining, and psychological assistance to protect workers transitioning out of the industry.

In terms of policies for organic production, the report highlights that the geographic relocation of production in the *Green Public Policy* scenario in order to deconcentrate livestock production could result in a higher volume of stranded assets and cause some food processors to exit the market. This suggests the need for policies that support the transfer of jobs between regions and protect vulnerable investors from potential bankruptcies. In the French poultry meat industry, the report stresses the importance of supporting small food processors, particularly in light of their ongoing low productivity and shrinking market share. Encouraging these small processors to invest in technology and improve their productivity is essential to enhance their competitiveness and sustainability.

Further policy issues were identified, including

- The need to improve logistics and co-ordinate food processors to help boost organic exports
- The decline in demand for whole chickens requires both genetic improvements in organic poultry strains to increase yields of parts such as fillets, and innovation in organic poultry products.
- Public procurement strategies could help utilise products in less demand at retail level, to avoid downgrading to conventional markets
- The issue of high processing and retailing margins keeping consumer prices high also needs to be addressed.
- A major gap exists in data quality regarding organic production flows beyond the farm gate. More comprehensive surveys and data collection on processed organic products could offer invaluable insights to improve policy and industry strategies for organic products.

Many **organic action plans**, analysed in WP1 of the project, emphasise the use of support measures to improve supply chain co-ordination and co-operation between businesses (Lampkin et al. 2024), in many cases reflecting the priority actions set out in the EU organic action plan (EU Commission 2021) and supported as part of Rural Development Programmes. In our review of the organic actions plans (Lampkin et al. 2024), updated for France, we identified the following measures relevant to supply chain development.

#### Investments aids:

- 5-10% higher grants, higher priority (AT, HU, IT, PL)
- Improve processing capacity for local products, inputs (BG, CZ, DE, EE, FR, HR, LV, MT, PL, PT, RO, SI, SK)
- Fund for Organic Farming to invest in projects (DK)
- Support start-ups and technological innovation (SE, SU)
- Storage, distribution facilities (SK)

#### Supply chain co-operation:

- Development of producer organisations, co-operative actions (BG, CY, CZ, EE, ES, FR, HR, HU, IE, IT, LV, MT, PL, RO, SI, SK)
- financial, advisory and facilitation support (BE)
- Increased transparency (BE)

- Supply chain organisation/networks, incl. vertical links (CY, CZ, DE, HU, IT, LU, NL, PL, PT, SE, SK)
- Umbrella organisations to support initiatives (EE)
- Increase organic market share and presence in retail outlets (CZ)
- Expand and diversify under-represented sectors (RO)
- Conferences, information days for stakeholders (CY, EE, FR)
- Improved input markets/availability (DE, HU)
- Explore options for price reductions (NL, SK)

#### Short supply chains:

- Development of short supply chains and local markets (AT, BG, CY, CZ, EE, ES, FI, HR, IT, LV, MT, RO)
- Strengthen local, small-scale processing (BG, CY)
- Direct marketing start-up support (AT)
- Focus on local products to reduce imports (BE)
- Box scheme pilot projects (BG)

#### Public procurement:

- Increase use of organic products in public institutions (see targets) (BG, CY, ES, FI, IE, LV, PL, PT, RO, SE, SI, SK, FR)
- Targets for public procurement set in several national action plans (AT 55% in canteens, BE 5%, CZ 5%, DK 60%, DE 30% in federal institutions, EE 50% in schools, FI 25%, FR 20%, HU 20%, LU 20%, NL 25%, SE 60%)
- Higher share of school fruit and milk (AT, BE, BG, CY, CZ, EE, ES, IE, LU, LV, NL, PL, PT)
- Increase information/data availability for suppliers, training for staff/officials (BE, CZ, DE, DK, EE, FI, FR, HR, HU, RO, SE, SI)
- Promote awareness (IE)
- Link to promotion of Mediterranean diet (PT)
- Stakeholder engagement (CY)

#### Gastronomy, canteens, and agro-tourism (HORECA):

- Increased use of organic products (AT, CZ, ES, FI, FR, HU, IE, IT, MT, NL, PT, SK)
- Financial support for organic restaurants (BE)
- Engagement with mass-catering organisations (SI, FR)
- Support for pilot projects (RO)
- Increased availability of information, staff training (BE, CZ, DK, EE, FR)
- Advisory support for businesses (AT, DE, DK)
- Certification schemes, in some cases co-financing (AT, BE, DK, DE, FI, HR, HU, SE, SI)
- Holidays on organic farms (AT, SI-30% of agritourism holdings)
- Information for tourism establishments, tourism maps, organic routes (EE, RO, SI)
- Digital app showing location of outlets (SE)

#### Bio-districts:

- Establishment of bioregions (CY, IT)
- Engage more business (BE)
- Help balance supply and demand (BE)
- Develop regional strategies (FI)
- Development of regional procurement models (HR)

**International trade:**

- Increased focus on exports, expand opportunities (AT, BE, BG, CY, DK, EE, FI, FR, NL, SE, SI)
- 5% organic share of total food exports (EE)
- Participation in trade fairs, other events (AT, BE, BG, CY, EE, FR, HR, HU, IE, NL, RO)
- Marketing campaigns, promotion of national products (AT, CY, EE, ES, IT, LU, LV, RO, SE)
- Feature organic products on government websites (CY)
- Updating commercial attachés in embassies (CY, RO)
- Maximise opportunities for exports in EU trade agreements (NL)

As can be seen, particular emphasis is given to public procurement in schools, hospitals and other public institutions, which is considered to be important both in terms of the scale of meal provision, particularly in larger cities, and as a means of increasing awareness about organic food in the general population. Experiences in several countries indicate the need for changes to menus to reduce costs and improve health, and for actions to support food sourcing and preparation as well as staff training and advice. Governments and local authorities can play a role in integrating organic foods in green/sustainable public procurement programmes, setting clear guidelines, standards and targets for their use, including minimum thresholds and transparency for organic content, with for example bronze, silver, gold labelling. Based on this, Copenhagen leads with 90% of public catering now organic.<sup>27</sup>

Support for organic bio-districts, integrating producers, consumers, local authorities and other actors, and supported by a range of market policies and initiatives, is also gaining in popularity.

Government intervention to restrict retailer margins on organic products have been discussed, but there is the potential for unintended negative consequences of such policies, and they have not been widely adopted. More widely debated are options to introduce tax incentives, for example by increasing VAT on products seen as problematic in environmental or animal welfare terms, or to reduce VAT on environmentally or animal welfare-friendly products including organic. While the latter could help reduce prices to consumers, and potentially increase demand overall helping farmers, it is possible that in context of supply shortages, consumer willingness to pay may be exploited by retailers, so that the benefit of any VAT reduction ends up with the retailer rather than the consumer or the producer. Similar responses were experienced with reductions on VAT on fuel during the high price inflation in 2022.<sup>28</sup>

All Member States have a responsibility to ensure that effective certification schemes are implemented based on the EU organic regulation. In most cases, this is linked to the use of the EU logo for organic product. In some countries, notably Denmark, France and Germany, national organic logos were developed before the European logo was launched and there is higher awareness than for the European logo. Other countries also have developed logos or are planning to do so to enhance the profile of products in local and export markets (e.g., AT, CZ, EE, HR, HU, IT, SI). Hospitality and catering activities are not covered by the EU organic regulations, but some countries have developed national schemes to cover these sectors (e.g., DE, DK—both with bronze, silver, gold categories for proportion of organic products used), often building on public procurement initiatives.

**4.1.2 Other related research**

In an earlier EU-funded project, Organic Marketing Initiatives and Rural Development (OMIARD, 2001-2004; Schmid et al. 2004), it was identified that producers as well as food companies play a role in developing relevant initiatives (OMIs). Their success depends on the vision of the founders, their

<sup>27</sup> <https://maaltider.kk.dk/sites/default/files/2022-06/The%20City%20of%20Copenhagen%20Food%20Strategy%202019.pdf> (accessed 26.01.26)

<sup>28</sup> <https://www.wirtschaftsdienst.eu/inhalt/jahr/2022/heft/8/beitrag/wirkung-der-energiesteuersenkung-auf-kraftstoffpreise.html> (accessed 26.01.26)

strategic options and their management choices. Those aiming for social or environmental objectives tend to underestimate financial imperatives and lack competency in financial management. Identified key success factors include improving supply, keeping logistics costs under control, and effective networking along the supply chain and within the region. The potential for OMs to contribute to sustainable rural development was not fully realised—while financial support for marketing and processing (e.g., RDP investment aids) was available, for consistent and sustained development, ideas and effort must come from organic producers themselves and the communities in which they are embedded. The policy support measures recommended then remain relevant, including improved market transparency; support for knowledge transfer and advice; financial support for OMs and organic farmers; consumer information and education; more public procurement of organic products; facilitation of cooperation and networking; and research and development projects.

In a study of organic supply chains in eight EU countries, Naspetti et al. (2011) concluded that high operating costs were one of the most relevant financial weaknesses in organic supply chains in Europe, but still collaboration between organic supply chain members aimed at reducing costs (or sharing benefits) was poorly developed. Closer collaboration was identified in the context of information sharing with respect to delivery, prices, demand forecast as well as with respect to food quality and safety. A focus on supply chain collaboration has become increasingly important as companies realise that it is the supply chain and not the individual organisation that is the source of competitive advantage. Collaboration and trust need to be further improved within the organic supply chains, particularly with the closest partners, particularly with respect to cost management, inventory planning, logistics and product development. Various policy initiatives to encourage producer organisations and supply chain networking and collaboration (see above) could be particularly relevant in this context.

More recently, the EU CAP Network organised a thematic group on strengthening the position of farmers in organic supply chains (EU CAP Network 2023).<sup>29</sup> The group highlighted the range and significance of EU and national policies, as also set out in this report. Access to land and investing in young people, including opportunities for local marketing such as direct sales or farmers markets, were also identified as important. Production and demand need to be better aligned, particularly if the EU 25% target is realised. Cooperation (horizontal & vertical) was seen as critical to the future viability and vitality of the organic value chain, giving businesses' increased capacity to reduce/share costs burdens, improve prices, increase confidence, increase bargaining power, and enhance marketing opportunities. Producer organisations have a key role in inspiring trust and reliability through the value chain, as well as in supporting new converters to ensure they have the necessary financial, technical and market expertise to engage with the organic market. AKIS and research were also seen as highly relevant in this context, particularly if extended to include value chain actors. Robust information management systems to help make business decisions were critical, but these required good data and information is not always available. Co-operation could help ensure transparency of agri-food markets and in doing so help facilitate well-functioning agricultural and food supply chains and support the promotion of organic food sustainability to consumers. Policy targets for increased consumption and public procurement of organic products could support increasing awareness and demand. Public procurement should act as a vehicle to stimulate cooperation at local level to ensure consistency and continuity of supply, including for farmers during conversion to organic production. Shared goals and visions that embrace cooperation and coordination between markets, producers and policymakers were seen as crucial for ensuring that policy objectives and targets for organics are realistic and can be realised by the value chain.

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<sup>29</sup> [https://eu-cap-network.ec.europa.eu/sites/default/files/publications/2023-03/TG%20Organics\\_Conclusions%20and%20Recommendations\\_final.pdf](https://eu-cap-network.ec.europa.eu/sites/default/files/publications/2023-03/TG%20Organics_Conclusions%20and%20Recommendations_final.pdf) (accessed 27.01.26)

A study is underway to better understand the position of organic food and drink in green public procurement that will be published in 2026. This will build on a report by the European Commission's Joint Research Centre (JRC) presenting potential sustainability criteria for public procurement of food, food services, and vending machines, serving as inspiration for public authorities who want to offer healthy and sustainable food and wish to reward sustainability efforts by European farmers, the food industry, and service providers in their procurement projects. The report lists the purchasing of organic products as the oldest element of green and sustainable public procurement in Europe and discusses various aspects how this can be applied, including best practice examples from Austria, Denmark, France, Finland and Spain (Garcia et al. 2025).

### 4.1.3 Development needs, challenges, and policy options

From our research (see Section 4.1.1) and other studies report here, there is a clear need to strengthen supply chain co-ordination and networking, both horizontally through producer organisations and vertically. Provisions exist to provide policy support for producer organisations.<sup>30</sup> Contracts and supply agreements can also help enhance security and reduce risks for producers. These are consistent with general efforts at EU level and in many member states to strengthen farmers' position in the agri-food supply chain,<sup>31</sup> as highlighted in the Commission's Vision for Agriculture and Food (EU Commission 2025b). A study of regulatory and voluntary schemes for fair agricultural remuneration concluded that regulating trading practices is complex, whereas private voluntary schemes with an explicit fair remuneration objective can have a positive impact on farmer remuneration. However, it depends on consumer willingness to pay "fair prices" to farmers (S&P Global Commodity and Arrete 2025).

There is also a clear need to broaden the range of marketing channels available to organic producers. For some, production and on-farm processing for local markets may be a good solution, and policies to support shorter supply chains with more direct links between producers and consumers could be relevant. Farmers markets, box schemes, Community Supported Agriculture, agritourism could all be relevant in this context. Enhanced variety (choice) and visibility of organic products is also highly relevant, which may be easier to realise in specialist organic outlets.

For others, particularly if operating on a larger scale, supplying processors and larger-scale retailers will be more relevant, but market transparency issues, particularly with respect to margins in different parts of the supply chain, become more relevant. Supply chain efficiencies, increased scale, low distribution costs and realistic margins at retail level—similar to core non-organic products—are all needed to deliver affordable products to consumers. Market transparency issues are recognised to be important by the Commission.<sup>32</sup> but the availability of good quality and timely organic statistical and market data remains a major problem (see also Chapter 8).

Creating affordable supplies in the right format for public procurement and hospitality, restaurants and catering (HORECA) is also a challenge. Collaboration between producers and processors, including food hubs to consolidate offers from different suppliers, may be relevant, potentially in a bio-region context. Such initiatives need to be supported by training, advice and data for the staff engaged at different levels.

Export markets also present a significant opportunity for organic products, but they are often under-developed and under-supported as part of trade initiatives, or they take place at the expense of the

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<sup>30</sup> [https://agriculture.ec.europa.eu/common-agricultural-policy/agri-food-supply-chain/producer-and-interbranch-organisations\\_en](https://agriculture.ec.europa.eu/common-agricultural-policy/agri-food-supply-chain/producer-and-interbranch-organisations_en) (accessed 27.01.26)

<sup>31</sup> [https://agriculture.ec.europa.eu/common-agricultural-policy/agri-food-supply-chain\\_en](https://agriculture.ec.europa.eu/common-agricultural-policy/agri-food-supply-chain_en) (accessed 27.01.26)

<sup>32</sup> [https://agriculture.ec.europa.eu/common-agricultural-policy/agri-food-supply-chain/market-transparency\\_en](https://agriculture.ec.europa.eu/common-agricultural-policy/agri-food-supply-chain/market-transparency_en) (accessed 27.01.26)

development of domestic markets for organic products in some countries. There is a need for policy initiatives to get the right balance between local, domestic outlets and export opportunities.

Periods of oversupply on organic markets, or high reliance on imports, are often seen as problematic due to the short-term impacts on prices affecting domestic producers, but consideration also needs to be given to how these supplies could be used to build market demand or permit new market actors to enter the sector, particularly given the conversion time-lag if new production is required.

## 4.2 National perspectives

As part of the national workshops, for each theme participants were presented with some key findings from the project results, with associated development needs and policy challenges and options identified, as well as national perspectives prepared by the workshop organisers drawing on local knowledge and documentation including national support programmes and organic action plans. Development needs identified in earlier national workshops in the project could also be integrated. In this section, we summarise the key outcomes for each topic from the national workshops, based on the documentation provided by the workshop organisers.

### 4.2.1 Austria

In Austria, organic market demand has started to increase again based on RollAMA data. In 2024, total retail sales value increased by 3.7% to €1.12 billion, while volumes increased by 5.5% to 261 thousand tonnes, more than reversing a decline the previous year. In value terms, overall market share for organic products was 11%, with fresh vegetables, potatoes, flour, baked goods and plant-based meat alternatives over 20%. Price differentials between organic and conventional products declined slightly in 2024, with, for example, meat prices reducing from 85% to 81% higher than non-organic, bread from 31% to 27%, and fresh milk from 9.7 to 7.3%. Organic purchasing in 2023, at €292 per capita per year, was amongst the highest in Europe, comparing with Switzerland at €476 and Denmark at €364. Further market data can be found in the project factsheets<sup>33</sup> and in the World of Organic Agriculture 2025 report (Willer et al. 2025).

The 2021 Austrian action plan for sustainable procurement (Aktionsplan Nachhaltige Beschaffung 2021<sup>34</sup>) specifies targets for organic food in public procurement at 23% by 2023, 30% by 2025 and 55% by 2030). By 2024 the value of organic catering exceeded €250 million.

The 2023 Austrian organic action plan of the Ministry<sup>35</sup> highlights regional groupings of organic farms, processors, gastronomy and catering establishments in Bio-districts. Sales-promoting advertising measures are also important to accompany the promotion of organic areas.

The Austrian workshop identified the following specific development needs policy challenges:

- Targeted advertising campaigns for organic food of Austrian origin should be stepped up, with “organic” and “regionality” more closely linked. The advertising campaigns of the Austrian brand “Zurück zum Ursprung” were cited as a positive example in this context.
- In order to make organic food more attractive and affordable for consumers, a reduction in VAT on organic food was seen as a sensible measure. However, it was not clear how it can be ensured that this “margin” reaches the organic producer and does not seep into the price calculation of retailers.

<sup>33</sup> <https://organictargets.eu/organic-sector-factsheets/>

<sup>34</sup> <https://www.nabe.gv.at/>

<sup>35</sup> [https://www.bmluk.gv.at/dam/jcr:f64398d3-03dd-4505-ab7d-2a4ad33c6610/BML-0002\\_GAP-Strategieplan\\_%C3%96sterreich\\_2023-2027\\_EN\\_v6\\_BF.pdf](https://www.bmluk.gv.at/dam/jcr:f64398d3-03dd-4505-ab7d-2a4ad33c6610/BML-0002_GAP-Strategieplan_%C3%96sterreich_2023-2027_EN_v6_BF.pdf)

This type of policy might also put direct marketers at a disadvantage. A reduction in VAT on organic food would require a clear political commitment at national level.

- The politically fixed targets for the proportion of organic food in public canteen kitchens in Austria should be implemented strictly and quickly.
- The establishment of a “retail price traffic light” for organic food in the form of an app which would enable interested consumers to classify the price of selected organic foods as fair, good or excessive. However, in many processed foods, the raw material costs only contribute a small proportion to the consumer price of the end product, so that such a price traffic light may have limited impact from a farmer’s point of view.
- As a result of climate change, the establishment of alternative, more drought-tolerant crops in production must be stepped up. Advertising must increasingly familiarize consumers with the resulting foods.
- An expansion of the product range in food retailing would boost sales of organic food.

Opportunities to address these issues include increased national scope for interpretation of EU requirements, including access to organic pasture under Regulation 848/2018. This would help strengthen the position of organic farmers and prevent reconversion to conventional.

#### 4.2.2 Denmark

While the market for organic food in Denmark is one of the most successful in Europe, in terms of share of retail sales and per capita consumption, the period since the pandemic including the Russian invasion of Ukraine has seen reductions in market demand which have proved problematic for supply chain development. Organic sales appear to be more sensitive to external shocks such as conflicts and inflation. There is increasing competition from issues such as climate friendly and regenerative agriculture—the case of Carlsberg focusing on the latter was discussed. From a climate perspective, organic may not be better per kg product, but there is a need to take a system perspective and consider the wider environmental aspects including biodiversity and reduced livestock in organic production systems. In Denmark, organic sales are primarily in supermarkets and not in specialty stores. It was discussed that the evidence from across countries shows that both strategies—organic mostly in conventional supermarkets or mostly in dedicated stores—can be successful in terms of a high share of organic. In Denmark, out-of-home consumption is highly developed, both in public institutions such as schools and in gastronomy.

#### 4.2.3 France

The retail sales value of organic food products peaked at €12.8 billion in 2020, falling to €12.1 billion in 2022, and stabilising at the same level in 2023 (Willer et al., 2025).

The French workshop recommended the following actions for sector development (in order of priority):

- Encourage long-term tripartite contracts (between producers, processors, and distributors), with penalties for breaches.
- Investigate the reasons for higher margins for organic products in processing and distribution—and to identify options to reduce these, through improving structures and scaling up to reduce problem of small volumes. The Observatory of Prices and Margins (OFPM) could include organic products on their analysis, with an appropriate identifier.
- Develop measures to promote more labour-intensive agroecological systems.
- Make greater use of the complementarity and synergies between (organic) livestock farming and arable crops—including enabling specialist crop producers to access production and slaughtering facilities and additional land for livestock
- Make public support for actors in the value chain (logistics, processing, distribution) conditional on a minimum organic share based on compulsory reporting.

- Better integration of producers in the value chain: multi-year contracts with fair prices, encouraging short distribution channels
- Reduce competition from alternative standards—while there is a desire to raise standards for all, there is concern about green-washing.
- Reduce downgrading of organic products through more targeted public purchasing strategies—including expanding use of less desirable meat cuts, misshapen products, in out-of-home catering.

There was also discussion around regional initiatives, including local connections and improved consumer information, traceability and transparency, as well as opportunities to integrate with collective catering. Scale and support for facilitation of such initiatives are important.

#### 4.2.4 Germany

The German market for organic food had also experienced difficulties following the pandemic and Ukraine war but was now back in growth. Data from AMI show that the total retail sales value of the German market grew from €12.3 to 15 billion in 2020 during Covid when households increased in-house consumption. Retail sales peaked at nearly €16 billion in 2021, falling back to €15.3 billion in 2022 as the pandemic ended and households started eating out again more, but demand was also impacted by food price inflation. Since then, the market has recovered in value and volume terms, reaching €17 billion in 2024. The increase has been particularly strong in drugstores (DM, Rossmann) and discounters (Aldi, Lidl, Netto), while specialist, smaller organic and other stores experienced further declines. Larger specialist stores have also increased shares.

The availability of raw materials and the lack of processing structures were also seen as problems. The scarcity of raw materials contradicts fears that the 25% target (30% in Germany) would flood the market.

Farmers see longer-term contracts with retailers as an opportunity for better planning and availability of products on the market. The availability of products for processing is limited and this needs to be addressed. Organic still provides an opportunity for differentiation in a retail sector facing growing competition. The German backcasting workshop (see Zanoli et al 2026) recommended more dedicated supply chain managers at regional level, jointly sponsored by Federal and State governments with a common programme for supply chain managers. Roundtables could be established at different points in the supply chains. This issue is also addressed in the national organic action plan Biostrategie 2030 (BMEL 2023) with a focus on strengthening contractual partnerships and increasing the organic share of food in public canteens and out-of-home catering. Germany, like Denmark, has introduced a bronze, silver, gold classification for catering establishments and their use of organic products.

It was noted that regional supply chains are not necessarily only beneficial, as reduced scale and higher fixed costs can result in higher costs for the consumer. The situation of the eco-model regions (bio-districts) was also addressed, some of which had to cease operations and in some cases face challenges with supplier networking. In the out-of-home catering sector, farmers and kitchens do not work well together, and the available budgets are insufficient. It may be necessary to approach the funding agencies to address this.

The idea of a national coordination body modelled on Agence Bio in France was mentioned as a way of providing an overview of processing structures. Otherwise, it was also emphasised that some development needs fall more within the remit of the private sector and are less a matter for policymakers.

#### 4.2.5 Hungary

Nielsen data on the development of the organic market in Hungary were presented (Györéné Kis and Jobbágy 2025). Between 2022 and 2024 retail sales value for organic products increased by 36% to

38.7 million HUF, or 0.62% of the total food drinks market. Over the same period, the total value of food and non-alcoholic drink sales increased by 26%, as measured by the Hungarian Central Statistical Office (KSH 2025). The organic data cover three different market structures for different product groups: a) all Hungary including online and offline sales; b) hypermarkets, supermarkets and drugstores and c) hypermarkets, supermarkets and discounters. Category b) grew by 19% while category c) grew by 40%. The overall organic market share is likely to be higher, as data collection does not cover total domestic sales for certain product categories. Supermarkets account for about 53% of organic sales, discounters 28%, hypermarkets 9% and online sales 8%.

Hungarian domestic demand is rather narrow and very limited. Little is known about organic supply chains. One reason for this is probably that in recent years and decades, producers have been primarily interested in exporting directly, which obviously generated significant additional income on the farm-level. However, this has meant that the domestic processing industry has not developed at all. This is true for producers of cereals and oilseeds, but not for fruit and vegetable producers, as these perishable products are typically processed in Hungarian processing plants (concentrates, frozen foods, preserves) but are not packaged for consumer sale in Hungary.

According to Traces, there are currently 25 certified cooperatives (producer organisations for apples, berries, sweet corn) registered as traders and processors, not as producers. The POs have an advisory programme and a research and development programme. There are no data on the number of producers or advisors involved. We have no information on the proportion of food purchased and consumed in the retail sector that is imported, who the domestic suppliers are, or whether it would be possible to replace imported products with domestic products.<sup>3</sup>

The use of organic food in public catering is currently around 0%. No information on the status of green public procurement in Hungary could be identified. Public procurement in Hungary could offer significant potential for organic products for schools, nurseries, crèches, hospitals, armed forces, prisons and factory canteens. An estimated 1-1.5 million meals per day (breakfast, lunch, dinner, snacks) are delivered. There are no state regulations for organic catering—Biokontroll has its own private system of requirements, which is not mandatory. Seasonal supply of prepared raw materials in large quantities are required. The annual raw material requirements for 1 million people are approximately: 6 kt pork, 6 kt poultry, 6.4 kt fresh fruit, 4 kt fresh vegetables, 2.4 kt dry pasta, 3.4 kt rice, 7.9 kt potatoes. Government Decree 676/2020 (XII. 28.) on the specific rules applicable to public procurement procedures for public catering services

In Hungary, there is a lack of intermediaries between commercial operators (discount stores, supermarkets) and producers. There is a lack of training for those working in retail and public catering, and there is a lack of regulation in public catering. There is little or no practical experience in Hungary. There is very little food available for delivery to public catering establishments. (producers produce basic agricultural products) .

There is a great need to review the opportunities in the commercial sector, with particular regard to the use of organic products in public catering. This would be assisted by:

- Launching pilot projects in Hungary to increase the share of organic products in local government and small-scale public catering
- Make public catering more sustainable (green public procurement guidelines)
- EU level directive on public catering.

#### 4.2.6 Italy

Supply chains, consumer demand and market data were discussed together in the Italian workshop. Where identifiable, notes relating to consumer demand and market data have been transferred to the relevant sections.

While Italy has both well-developed domestic and export markets for organic products, there is significant fragmentation, with long logistics chains, poor aggregation, and a strong North-South divide in both production and consumption patterns. There is a need to develop

- A transformed system with strong regional aggregation, integrated logistics platforms, and value chains that own their retail outlets;
- a fundamental shift from the current action-based CAP to a results-based system with true cost accounting, linking subsidies to value chain participation;
- digital transformation where virtual shopping overtakes physical shopping.

In terms of policy gaps, concerns were expressed about the lack of results-based focus to CAP support, certification restrictions on turnover and land area, policy conditioning and path-dependency with respect to fossil-based business and industrial interests and bureaucratic burdens (heavy and fragmented procedures at regional/national levels). Value chains are not well integrated in support systems, with AKIS confined to rural development measures and disconnected from value chains, lack of priority for organic in support allocation, and an absence of reference prices for organic at production level to avoid unfair practices. There is limited sector and stakeholder integration, co-ordination and engagement, for example between agriculture, tourism and environment and stakeholder panels for discussions. There are insufficient public procurement standards, including mandatory organic procurement requirements for public institutions. To address these issues, opportunities exist to:

- Reform the CAP with shift to a results-based approach, value chain integration, and prioritisation of organic (increase % share of resources to organic farming).
- Improve value chain certification and regulation as well as clarification and simplification of food-labelling, ensuring appropriate recognition of organic attributes concerning health, environment and welfare.
- Increase investment in public infrastructure, product aggregation and distribution initiatives, retail support as well as alternative distribution channels.
- Support capacity building, including interprofessional representation within value chains.
- Enhance the role of bio-districts, emphasising multi-functional integration and short supply chains.

The participants confirmed that the current status description reflects the national sector situation, and that shared development needs and policy gaps and challenges are appropriate to the Italian context. They made the following policy recommendations (in order of priority):

- Support organic demand by encouraging public and private procurement (school and hospital canteens, hotels) by engaging restaurant managers and educators.
- Build on the national organic action plan providing funding to understand current weaknesses of organic public procurement and design solutions to address them—Need to rethink the ‘organic narrative’ learning from achievements of big PDOs.
- Promote organic farming as a tool to fight food poverty.
- Make organic certification costs tax-deductible.
- Reduce VAT on organic products.
- Identify CAP funding opportunities for organic supply chain development.
- Support innovation and technical assistance for organic through encouraging organic supply chain development and collaboration.

#### 4.2.7 Romania

As in many other countries, organic market growth was disrupted due to the pandemic aftermath and food price inflation resulting from the Russian invasion of Ukraine. The market in Romania is emerging and not very well consolidated. There is a need to:

- raise consumer awareness of the benefits and improve the affordability of organic food
- increase product-innovation and extend the range of products available
- raise the profile/visibility of organic products in sales strategies
- increase the share of organic food in out-of-home catering
- strengthen collaboration in supply chains/food systems, including integrated supply chains, short distribution channels and supply contracts for producers.

Policy gaps and challenges were identified with respect to:

- Opportunities for supply chain efficiencies and increased structural dialogue between retailers and Government to achieve increased scale and realistic retail margins.
- Enhanced variety (choice) and visibility of organic products (more an issue for retailers, maybe easier in specialist stores, but also a question of consumer values)
- Higher % grant contributions for organic investments

In conclusion, the group recommended more policy support for:

- **Supply chain efficiency**, including the creation of producer groups/organisations, cooperatives and other initiatives for better supply chain co-ordination and integration, as well and shorter supply chains with more direct links between producers and consumers. The focus on local consumption, including value-added products, could be enhanced through consumer information and education campaigns. There is also a need for investment in product aggregation and distribution centres, and communities of practice/clusters, also for the supply of out-of-home catering.
- **Public procurement** for schools, hospitals, other public institutions, and private sector activities in canteens, gastronomy, agritourism (HORECA). Best practice examples from other countries should be better communicated and integrated in clear guidance/standards including targets for use of organic ingredients, and minimum thresholds and transparency for organic content, e.g. bronze, silver, gold labelling. Training for staff in sourcing and preparing organic food, including menu adaptation and similar activities for private sector is needed, with more research and communication about the value of organic diets to improve health. Opportunities exist to address some of these issues in a green/sustainable public procurement context, but there is a need to clarify green procurement provisions in Romanian legislation. Better regulation and harmonisation of staff training and advice at EU level would also assist.
- **Developing export markets** by including organic food in export actions (trade missions, fairs etc.) and facilitation of cross border organic sectors
- **Reducing VAT** on organic products to 5%

## 4.3 European perspectives

### 4.3.1 EU Commission interviews, Autumn 2025

Interviews were conducted in September and October 2025 with representatives from different units within the European Commission covering the different themes in this report. It was not, however, possible to discuss the supply chain development proposals in the available time.

### 4.3.2 Organic Summit, Copenhagen, August 2025

The Organic Summit (Anon 2025) was held as part of the Danish Presidency of the European Union and brought together organic sector stakeholders and policymakers from many countries. Many of the themes and policy recommendations discussed during this conference, including those featured in the Conference Charter and the Session summaries, are relevant to the work in the OrganicTargets4EU project and are therefore considered in some detail here. The role of the food industry and supply chains featured strongly in the discussions and conclusions of the conference and were reflected in the

conference Charter reflecting the organic sector's contribution to sustainability goals and rural employment.

The development of sustainable organic supply chains should be supported by sustainability benchmarking, regulatory impact assessments, reductions in administrative burdens, technological advancements in organic practices, strengthened exports and easier access to organic imports to help source raw materials and increase resilience.

Market developments need to recognise organic purchasing, both public and private, as a driver to change diets in line with dietary guidelines benefitting the health of people and the planet. This can be influenced through retailer branding and organic labelling, as well as increased accessibility to organic products from different outlets. Organic public and private procurement could be strengthened by setting measurable targets and introducing an organic cuisine label across the EU, similar to the Bronze, Silver, Gold categories already operation in Denmark and Germany.

In the discussions, there was debate around fair pricing and whether it was possible to develop better price mechanisms, such as lower VAT on organic food and accounting for the costs environmental damage more explicitly. Demand and price stability should be supported through consumer education, CAP payments, flexible supply chains, and possibly tailored insurance solutions for organic farms.

Presentations from the supermarket chain Meny in Denmark and Lidl in the Netherlands highlighted the importance of strong public-private partnerships and close collaboration between government, NGOs, and industry. Clear policy signals give retailers greater confidence to engage with organic food sales. In Denmark, the state-owned Red Ø label for organic gave credibility, while strong farmer cooperatives enabled scale and market access. Shared ownership of the agenda across politics, industry, and consumers created stability. Economic viability is critical for farmers and for maintaining the supply base. Public procurement and effective catering labelling can play an important role in expanding organic sales and in increasing consumer awareness.

Despite the trust in organic labelling, price concerns can be an issue that affects sales. While consumer awareness of the benefits can be enhanced, the price gap remains a structural challenge, and perceptions of how organic and non-organic prices relate to each other can vary (see also next Chapter). Price gaps between organic and non-organic directly determine sales: smaller gaps increase organic consumption, while larger ones reduce it. Retailers and producers agreed that organic growth depends on both price competitiveness and a strong value narrative that highlights welfare, sustainability, and quality. The Lidl case highlighted how retailers can be drivers of affordability and accessibility, by introducing monthly discounts and focusing on price as the key long-term strategy. But some retailer strategies to generate luxury product margins from organic sales may run counter to this. Sales strategies need to address diverse consumer groups—from budget-sensitive households to quality-driven buyers—and especially engage younger generations

Supplier–retailer collaboration is a key part of addressing the challenges. Co-creation with farmers and suppliers is essential for innovation and consumer trust. Lidl learned that perceived sourcing hurdles disappeared once farmers were directly involved, while Meny defined a partnership strategy to boost close collaborators and facilitate cross-supplier innovation.

Public procurement—a Danish organic success story—received considerable attention during the conference. Copenhagen's 25-year journey to nearly 90% organic meals in 2025 shows how cooking from scratch, seasonal sourcing, and staff training can transform public kitchens without extra budgets, while improving taste, welfare, and community well-being. Thousands of kitchen staff were retrained with support from culinary consultants and trusted advisors. Training programmes for chefs, procurement staff, and schools—such as Copenhagen's "Green Chef" or Stockholm's new training initiatives—help staff make informed choices, reduce waste, and build confidence in using organic food.

Certification motivated progress, while tracking systems provided accountability and identified areas for improvement. Kitchen practices were changed, emphasising cooking from scratch, using seasonal ingredients, reducing meat, introducing alternative proteins, and minimising food waste, making it possible to go organic within existing budgets, despite higher ingredient costs. Positive taste tests with citizens, especially the elderly, built trust in new dishes, while staff pride created a movement for organic procurement that extended beyond kitchens into institutions and communities. Translating these quality-of-life improvements for children, the elderly, and staff into clear economic arguments that policymakers and finance ministers can use to continue scaling up and sustaining the transition.

Copenhagen is not the only example. With public food procurement in the EU worth €50 billion annually, cities like Paris and Stockholm are also showing how procurement can shift thousands of hectares into organic production, influence diets, and shape resilient food systems. Setting clear targets drives progress. Paris has reached 45% organic meals (with a 75% goal) since setting the goal in 2022, while Stockholm targets 70%. Longterm, fixed targets—supported by political leadership—give public authorities and private actors a roadmap to invest in organic supply chains. Barriers remain in supply, cost, and logistics. Cities face challenges such as inconsistent supply, high costs, and mismatched packaging sizes for schools. Smaller farmers also struggle to access procurement systems unless tenders are adapted to include them. Trust and cooperation across the value chain are essential. Building trust between public authorities, private suppliers, and farmers takes time. Examples included food hubs in Gent and regional platforms in Paris that connect actors across the system.

### 4.3.3 Final OrganicTargets4EU project conference, Brussels, November 2025

At the final conference of the OrganicTargets4EU project, an international audience of stakeholders and policymakers heard about some of the results of the project and a summarised version of the emerging policy recommendations. In a World Café exercise, participants had the opportunity to reflect on the policy recommendation and to identify specific priorities and additional considerations.

Key issues identified included improving price transparency/affordability and building capacity in the organic sector, in particular partnerships with multiple retailers. This can be supported by giving priority to funding for organic market development projects using best practices such as waste minimisation. Minimum targets for organic and local public procurement, building up ambition from one meal per week, were suggested.

There is a need to identify data and best practice examples from previously funded projects, and to support this through peer-to-peer training and information exchange. Reporting targets could also be set for processors and retailers, both with respect to turnover and transparency of margins on organic sales (a reflection of continuing concerns about retailer power relative to that of producers).

## 4.4 Policy recommendations

The market for organic products has been critical for the development of the organic sector for more than five decades, supported by a clear legal basis in the EU organic regulations since the early 1990s. However, there is a need to recognise that the organic market developed as a means to an end—to enable organic producers to maintain financially viable systems, while seeking to develop less input-intensive and environmentally harmful production systems in the absence of direct policy support. Although the market has become very important, it was never intended to be the primary justification for developing organic production, and there are real risks that an over-emphasis on markets could lead to the dominance of commercial interests and the loss of focus on core organic quality, health, social and environmental sustainability principles. With many of the benefits from organic farming accruing to society at large, the case for continued public investment in the sector remain highly relevant, while building on the market's capacity to sustain long-term producer engagement. Policies to support

organic market development should be designed to be compatible with environmental support policies (see Chapter 3) and consumer motivations and product claims (see Chapter 5), with care taken that area support policies complement and do not undermine market development. Organic action plans provide an important tool to help deliver policy integration (see Chapter 10).

The overall aim for organic supply chain development should be to create and strengthen a diverse range of marketing channels reaching a wide range of consumers and citizens. This includes seeking an appropriate balance between developing domestic and export markets, and between multiple retailers, specialist stores, short supply chains (farm shops, farmers' markets, box schemes) and out-of-home consumption including public procurement, gastronomy and agritourism.

Many of the tools already exist in EU policy frameworks including CMOs (producer organisations), green public procurement, rural development measures, LEADER and the planned European Competitiveness Fund (for transnational activities). These should be sustained and developed appropriately, with Member States encouraged to include a specific focus on organic initiatives in the following areas, ideally in the context of national or regional organic action plans and bio-districts.

#### Support investment in the development of organic processing and marketing infrastructure, by:

- Prioritising **investments** in buildings, production technology, processing and marketing facilities, including farm shops, catering and agritourism, and similar actions for aquaculture, using favourable eligibility conditions or higher percentage grant funding. The proposed CAP transition lump-sum funding may also be appropriate in this context.
- Developing slaughtering and processing capacity suited to the scale of the organic sector. This should include addressing requirements to relocate capacity from traditional production areas, potentially leaving stranded assets and workforce redundancies requiring structural adjustment support.
- Support transnational networks of organic processing facilities and slaughterhouses using the European Competitiveness Fund.
- Investing in supply chain aggregation and distribution hubs and logistics, in particular to assist groups of producers supplying small, local retailers, schools and other out-of-home catering establishments, as well as building cold chain storage and distribution systems to reduce post-harvest losses of perishable products

#### Strengthen the transparency and efficiency of organic supply chains to deliver sustainable, quality and affordable organic products, by:

- Supporting producer organisations (CMO Reg.), co-operatives and other forms of supply chain co-ordination, networking and integration. Organic organisations can help to facilitate trust-building and co-design and to scale successful coordination models across regions/sectors.
- Improving market development capacity in the organic sector to enable effective collaboration with retailers and processors of organic food.
- Encouraging the use of secure, longer-term contracts and supply agreements between supply chain actors to rebalance risks, improve traceability, secure producer incomes and encourage fair cost sharing.
- Assessing, potentially with pilot margin dashboards, the impact of margins at different levels of the supply chain, as well as economies of scale and supply chain efficiencies, on the price of and affordability of organic food, and the share of the consumer willingness-to-pay more actually reaching the farmer.
- Addressing concerns arising about market power imbalances, barriers to entry and neglect of organic principles in value chains.

**Exploit the potential of public procurement to grow the demand for organic food and citizen engagement, by:**

- Sharing best-practice examples, from countries like Denmark, with the support at EU level of the EU CAP Network and Green Public Procurement guidelines with specific reference to organic products.
- Collating cost and benefit data, using common reporting/monitoring principles, to evidence the value of organic products in public procurement.
- Developing appropriate criteria for use of certified organic products with verifiable impacts in sustainability guidelines compatible with product sourcing regulations.
- Encouraging the use of organic products in national and regional public procurement, with clear targets and labelling thresholds (e.g., Bronze, Silver, Gold), and advisory, training and data support for the actors involved. This may include reduced meat menus and products less demanded by retailers as well as flexibility to procure bottleneck products seasonally.
- Helping organic organisation support procurement pilots, train procurers, and publish 'what works' handbooks for schools/hospitals.

**Encourage regional marketing, short supply chains and bio-districts, more directly linking producers and consumers, by:**

- Diversifying marketing channels to include short supply chains and direct sales to consumers, including box schemes, farmers markets and online sales.
- Developing use of organic products in gastronomy and hospitality catering, including agritourism, with similar information support measures as for public procurement, including engaging with restaurant managers and people working in public and private catering to offer training and mentoring on how to source and work with organic ingredients
- Encouraging MS to develop bio-districts and regional action plans as a means for developing local organic markets including gastronomy and agritourism.

**Enable organic suppliers to engage with intra-EU and international trade, by:**

- Encouraging at EU-level a focus on organic products in export initiatives and relevant trade agreements.
- Including, at national level, organic businesses in export promotion initiatives, including trade fairs, embassy and other international marketing actions, as well as facilitation of cross-border organic sectors, potentially utilising the proposed European Competitiveness Fund.
- Providing information on regulatory compliance issues, including organic and customs regulations.

**Improve the availability and quality of organic market information and data, to support business and policy decision making and to facilitate new actors entering the sector, by:**

- Encouraging the inclusion of value chain actors (processors, caterers) in AKIS activities (see Chapter 6).
- Collating data on funded organic projects, including outcomes and best practice examples, so that policy relevance and effectiveness can be assessed, and experiences shared, for example through EU CAP Network mechanisms.
- Supporting relevant and interoperable data collection standards and coordination projects (see Chapter 8), and institutional capacity development such as market observatories.

## 5 Consumer demand and promotion

From a consumer perspective, organic agriculture has many benefits, from protecting biodiversity to promoting public health by reducing exposure to harmful chemicals. However, consumer demand for organic products lags behind production (Sadler et al., 2024), despite the rapid growth rates in organic retail sales value in the last 25 years (see Chapter 2). Reaching 25% of agricultural land under organic requires not only expanding organic production but also stimulating consumer demand for organic products.

Organic products are identified through organic labels, and the EU regulation on organic food regulates production practices and the use of the Euroleaf organic logo. Purchasing is influenced by various factors, which can be consumer related, product specific, and external. External factors include price sensitivity and availability of product assortment, whereas competing environmental claims, brand reputation, and other promotion activities belong to the product-specific factors (Haiyan et al. 2023).

Understanding these influencing factors is crucial for both policymakers and retailers seeking to encourage organic consumption. The socio-economic impacts on markets were the focus of Work Package (WP) 4 of the OrganicTargets4EU project.

### 5.1 Project results and policy context

#### 5.1.1 Project results

Two of the **scenarios developed in WP2** (Zanoli et al. 2026) emphasise demand and consumption as drivers of organic development.

- Organic on Every Table envisions widespread recognition and support for organic farming, driven by its environmental and societal benefits. Despite challenges to the Green Deal, organic practices align with efforts to protect biodiversity and water resources, gaining trust and permeating European households and institutions. Supply chain improvements and increased availability drive organic surges, supported by favourable policies and investments. Organic farming integrates with sustainable practices, emerging as a cornerstone of positive societal and environmental change.
- Organic Power to the People outlines a scenario where European citizens face profound environmental challenges, prompting a push for organic food availability despite political inertia. Organic agriculture gains support from private financial sectors, resulting in increased conversion and consumer pressure for expanded offerings. NGOs and civil society movements advocate for equitable supply chains, while grassroots efforts and governmental responses signal a collective commitment to address climate and health issues through organic agriculture, despite European-level policy failures.

The consumer research in WP4 investigates the importance of increasing the availability and broadening the range of organic products. **Online supermarket experiments** were designed to explore how assortment and other marketing strategies influence consumer behaviour towards organic products (Frank et al. 2025). Labelling other environmental issues, such as climate change, might also influence consumer choices of organic products and therefore needs to be done as part of a cohesive narrative. Conducted across four of the project's focus countries (Denmark, Italy, Germany, and Romania), the study examined the roles of different labels, including Climate labelling (a potentially competing informational nudge), Social Norm labelling, and different private brand labels (from premium to basic as an indicator or brand strategy). In addition, the impacts of assortment changes—a powerful aspect of the supermarket choice architecture—were studied.

The results can be summarised as follows:

- Assortment adjustment, in particular a wider range of organic choices, proved very effective at increasing organic uptake, more than any other tested choice architecture interventions. For example, increasing the organic share in a product category from 25% to 50% resulted in a 45% increase in sales.
- The emerging climate labelling of food products might potentially reduce consumers' attention towards and choices of organic products if it appears equally on conventional and organic products, which it most likely will.
- Social norm cues or nudges, such as 'Popular choice,' are common especially in online retail, and they favour the products they appear on. To support the organic market, they need to be on organic products and integrated in a cohesive narrative that resonates with societal values and cultural contexts.
- Conventional premium brands are strong competitors to organic. Due to organic already having a perceived premium status, adding a premium label to organic does not in itself have a lot of effect, but it will strengthen the competitiveness of the organic product towards premium conventional products. Private label premium branding of organic products may have a potential to increasing their competitiveness towards conventional premium brands.

Other factors that influence organic demand include price, product category, age, gender, and the personal importance of health and environmental goals (Frank et al. 2025).

While growth in market demand has been more challenging following the pandemic, and in particular the food price inflation period following the invasion of Ukraine, as consumers revert to previous purchasing behaviours there is evidence of recovery taking place since 2024. A two-stages Delphi analysis of **supply chain** actors was conducted with processors, retailers, consultants, and other actors, including from out-of-home catering. Participants found it difficult to project themselves into a 2030 timeframe, being strongly influenced by the current economic situation and difficulties in organic farming in some EU countries (Cisowski and Serre 2024). Most experts believed that communication aimed at consumers is important and 65% believed that the Government has a role to play in this, as well as retailers.

The study found that the following issues are considered important in relation to communication to consumers, although there was no consensus on all points of view among all experts (Cisowski and Serre 2024):

- explain what organic is (education/information campaigns)
- make organic more attractive (including more affordable)
- communicate health, environmental, and other benefits of organic
- also feature disadvantages of conventional farming (only agreed to by 20% of experts)
- target schools and younger people
- increase transparency about what organic production requires
- clarify competing labels and greenwashing
- use simple messaging.

There is also room to increase the share of organic food in out-of-home catering and better exploit different markets: local, national, European, global. Improved collaboration potential across food systems includes integrated supply chains, short distribution channels, and supply contracts.

### 5.1.2 Other related research

Across Europe, studies consistently identify three practical conditions that increase organic purchasing: (1) organic options are available across everyday categories; (2) the EU organic logo is

easy to spot and trusted; and (3) consumers are not overloaded with competing sustainability claims (Schleenbecker & Hamm, 2013).

The typical organic consumer is concerned about the environment, health, and safety matters, and cares less about food prices (Leonidou et al., 2022).

Case studies from Denmark illustrate that the collaborative actions by different groups of actors (business/industry, policy, civil society, and consumers), having different roles, can contribute to an impactful mix of interventions, with the speed of transition depending on the level of policy commitment (Schulze et al. 2024). Retail chains play an important role for determining the degree to which sustainable food is available and how it is promoted at the point of sale. Consumers play a pivotal role in forcing change by voting with their money.

Sadler et al., (2024) reviewed evidence from studies evaluating real-world marketing interventions that aim to increase consumer demand for organic foods and beverages and to identify characteristics of effective interventions. Despite the widespread use of organic logos, the evidence on interventions related to real world products proved to be limited. According to the authors' summary, price premiums have negative or no effects on consumer demand, although a subset of consumers are willing to pay higher prices. Price promotions have mixed effects depending on product and customer type. Some place-based interventions—such as placing organic products together in one part of the store—show positive impacts on consumer demand. Some promotional interventions—such as newspaper coverage and including organic messaging near product displays—have been effective at increasing consumer demand. Effectiveness differs across the type of product, store and customer, suggesting that organic marketing interventions need to be targeted strategically to promote more sustainable consumption. However, the authors concluded that much more evidence is needed to understand the impacts of interventions on actual demand for organic foods and beverages across a variety of product categories, considering also real-world studies of product interventions including the use of organic logos (Sadler et al., 2024).

Sonntag et al. (2024) found high level of awareness for the organic label among German consumers, but low level of trust. Trust is largely determined by consumer beliefs about the trustworthiness of food chain actors (Macready et al., 2025).

Work from Germany highlights that consumers' **premium price expectations** of organic food are higher than their willingness to pay for organic food and also than actual premium prices (Zander, 2025). Among the reasons for the high-price image of organic food are low price awareness for most food items including organic (related to habitual shopping behaviour and lack of time for price comparisons), declining premiums in the organic market, public communication about expensive / high-value organic, and price seen as a quality indicator. Price remains an important attribute, and so does its communication, which is also reflected in the growing market share of discounters in the organic market (Zander, 2025).

A review of research about the **willingness to pay** a premium for organic found that price promotions can have a negative effect on consumer willingness to pay a premium, especially if they are uncertain about the quality (Katt & Meixner, 2020).

### 5.1.3 Development needs, challenges, and policy gaps

Reaching more consumers and increasing consumer demand require improved availability of organic products and clear ways to identify them, both in retail and in catering outlets, as well as improved understanding and communication of the benefits of organic. In retail, strategies for wider assortments, distributed placement, shelf markers and labels, as well as branding, packaging, and promotion activities are important. Strategies for promoting organic food also need to consider demographics

and consumer heterogeneity—age, stage in consumer lifecycle (e.g., recently left home, new family, empty nesters, retirees), values, and lifestyles.

There is a need for increased transparency and better labelling and communication of organic in general, and especially of its health, environmental, and welfare attributes, avoiding the assumption that consumers understand all the issues covered by the term “organic.” There is also a need to weed out confusing and unfounded green labelling and claims and to ensure that future eco- and climate labelling of food products is implemented in a way that does not threaten the organic market.

The general awareness of organic needs to be increased through better educational provision in schools, colleges, and universities, including school gardens and farm and factory visits. To reach a wider audience, a proficient use of social media is essential, if possible, with support from public figures. There is also a need for stronger government-led communication with increased budgets, in partnership with organic and food sectors, as well as clarification and simplification of food-labelling, ensuring appropriate recognition of organic attributes concerning health, environment, and welfare. Opportunities for policy implementation include existing EU Promotion funding, which should be used as effectively as possible.

#### 5.1.4 Specific policy context for consumer demand and promotion

The **EU Commission Vision for Agriculture and Food** (EU Commission 2025a, see also Chapter 1) emphasises the need to create conditions in which consumers are enabled to make sustainability choices. It sets out that consumers’ relationship with food has evolved, highlighting increases in the degree of processing and longer more complex supply chains, while affordability remains a key concern. The vision sets out that “*Going back to the “roots” and re-establishing the link between food, territory, seasonality, cultures and local traditions is very important*” (p. 22). And for consumers to be able to play an important role in the transition of the food system they need access to trustworthy information. “*Clearing out misleading environmental claims and unreliable sustainability labels is a prerequisite for equipping consumers with the information they need to make sustainable choices*” (p. 22). And highlighting that “*the EU promotion policy will remain a strategic policy tool to be used to enhance consumer awareness about EU agricultural and fishery and aquaculture products and quality schemes, including the EU organic farming label.*” (p. 23) (EU Commission 2025b).

The European Commission offers funding for initiatives that **promote EU agricultural products** both within the EU and in third countries. It helps EU producers to sell their farm products in an increasingly competitive global marketplace, while delivering jobs and growth at home. Two different promotion actions are foreseen: those run by trade, intertrade or associations of producer organisations, agri-food bodies and co-financed by the EU, and those run directly by the EU itself, including to develop agri-food trade and participation in fairs and communication campaigns.<sup>36</sup> So far 90 campaigns promoting EU organic products have been supported, covering many countries and products within but also outside the EU.<sup>37</sup>

**Nudging Organic**<sup>38</sup> is a three-year project funded by Europe that uses creative new ways to spread knowledge about what you get and what you contribute to when you choose organic. The organic sector organizations BioForum in Flanders, Pro Luomu in Finland, Bionext in the Netherlands and Organic Sweden in Sweden are behind this initiative. The interventions encompassed strategic product placement, point-of-sale reminders to encourage organic and positively framed messages that reinforce sustainable behaviours. These strategies were tested in experiments with specific products

<sup>36</sup>[https://agriculture.ec.europa.eu/common-agricultural-policy/market-measures/promotion-eu-farm-products\\_en](https://agriculture.ec.europa.eu/common-agricultural-policy/market-measures/promotion-eu-farm-products_en).

<sup>37</sup> <https://enjoy-its-from-europe.campaign.europa.eu/en/campaigns>

<sup>38</sup><https://demooisteboodschapisbio.be/wp-content/uploads/2025/04/Sustainable-Nudging-Report-2025-common.pdf>

in four participating countries. They were found to significantly boosted organic sales, demonstrating scalability across diverse contexts.

The **principles related to the labelling and advertising of organic products** in the EU are laid down mainly in Chapter IV of Regulation EU/2018/848, which includes reference to compulsory indications (i.e., the code number of the control authority, the Euroleaf logo (with some exceptions) and with it an indication of the place of origin of the agricultural raw materials). In the case of mass catering—so far not covered by the Regulation—Member States can develop their own rules. National logos and private logos may be used in the labelling, presentation, and advertising of products which comply with this Regulation.

The Directive **Empowering Consumers for Green Transition** (EU) 2024/825<sup>39</sup> (emco) introduces specific rules in Union consumer law to tackle unfair commercial practices that mislead consumers and prevent them from making sustainable consumption choices, such as practices associated with misleading environmental claims ('greenwashing'). This directive creates a European framework for environmental claims and sustainability labels but does not contain details on organic.

A proposal for a EU Directive on **Green Claims** was published in 2023 (EU Commission 2023) but has not yet come into force. There is some uncertainty about the likely impact on the labelling of organic food, although the proposal states that it should not apply to environmental claims in other legislation, such as the Regulation (EU) 2018/848 (Art. 1 of Proposal). This is expanded on in Recital 9, where it is assumed that consumers recognise the positive impacts of organic farming on biodiversity, soil, and water. The terms "bio" or "eco" can only be used for food and fibres if certified organic, but they can be used for other products such as detergents. Uncertainty arises in relation to the likely impact of the Directive in relation to claims on the impact of organic on climate, health, and animal welfare.

## 5.2 National perspectives

As part of the national policy workshops undertaken in WP7, for each theme, participants were presented with some key findings from the project, with associated development needs and policy challenges and options identified. They were also presented with national perspectives prepared by the workshop organisers drawing on local knowledge and documentation including national support programmes and organic action plans. Development needs identified in earlier national workshops in the project could also be integrated. In this section, we summarise the key outcomes for each topic from the national workshops, based on the documentation provided by the workshop organisers.

### 5.2.1 Austria

At the Austrian workshop results of a national consumer study were presented, highlighting that regional production, promotion actions, Austrian origin, an affordable price and animal welfare have recently increased in importance for consumers (Schantl 2023). In addition to the Euroleaf logo, six other organic labels have importance in the country, mainly referring to "bio". The discussion highlighted the following issues

- **Honesty and transparency in advertising:** The reality of organic farming should be portrayed more in commercials and advertising themes. This would also increase consumer understanding that organic farmers need higher producer prices than conventional farmers. Organic farming should not be portrayed in advertising as a nostalgic form of farming. Instead, an image of organic farmers as high-tech engineers should be created.

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<sup>39</sup> <https://eur-lex.europa.eu/eli/dir/2024/825/oj/eng>

- Marketing should demonstrate the positive effects of eating organic food (environmental effects, health effects). The participants were, however, aware that this is difficult to implement because, according to the current legal situation, health claims may not be advertised.
- There is a very limited offer of organic in the catering sector. The willingness to buy organic in out-of-home consumption is probably higher than the current opportunities imply. Transparent labelling of organic products and organic dishes in restaurants and pubs, accompanied by a mandatory annual organic inspection for restaurants and pubs.
- It was further suggested to strengthen the market presence of Austrian organic food by relaunching the existing AMA organic seal.

The following suggestions were made (in order of agreement expressed):

- The proportion of organic food in public sector canteens, which has been formulated as a national political objective, should be made mandatory
- Alternative concepts such as “regenerative” or “regional” should not be excluded, but rather brought on board
- In advertising for organic food, the terms “regionality” and “organic” should be closely linked together
- Consumer education must be strengthened: Information measures on the benefits of organic food must be more firmly anchored in the curricula of kindergartens, schools and adult education institutions

### 5.2.2 Denmark

In the Danish workshop the topics of supply chains and consumers were discussed together. The discussion of the status-quo considered a reduction in organic sales the last years and the fact that some countries have discontinued their goals for an organic share—e.g., Sweden and France. and confirmed the significant opportunity of out-of-home consumption. The discussion highlighted the following points:

- Organic sales, compared to conventional, are more sensitive to external shocks such as conflicts and inflation.
- There is an increasing competition from topics such as climate and regenerative—as Carlsberg focusing on the latter illustrates.
- When looking at it from a climate perspective, organic is not in general better—but it is necessary to take a system perspective and consider the wider environmental aspects, as e.g., reducing livestock in organic production systems.
- In Denmark, most organic sales are in supermarkets and not in specialty stores. The evidence from across countries shows that both strategies—organic mostly in conventional supermarkets or mostly in dedicated stores—can be successful in terms of a high share of organic.

No specific suggestions for recommendations were made.

### 5.2.3 France

In the French workshop, the themes of organic area support, sector development and markets and consumption were discussed together.

The presentation of the national situation in relation to markets and consumers highlighted that fewer French people eat organic products regularly as compared to in 2021. Consumers are increasingly concerned about health, believe that organic products are better for their health and find undeniable environmental benefits but remark on a confusing jungle of labels. And affordability remains a major obstacle for low-income households. Consumption stabilised in 2024 after a fall between 2021 and

2023 due to inflation. Two national campaigns (#BioRéflexe and "C'est bio la France" campaigns) are underway to boost consumption, particularly among young people and urban dwellers.

A revision of the Plan Ambition Bio is scheduled for the end of 2025 and there are local initiatives: e.g., Green Ordinance, PAT. SNANC under public consultation, with ambition raised to 12% organic products.

The discussion of markets and consumption highlighted the following points:

- Educational communication
- The role of taxation: Lowering VAT on organic food products would send a strong signal, also to farmers, but there is a danger that the distributors would capture the difference,
- Decreasing prices was seen as a strategy in a situation of low demand, also less emphasis on "organic" which consumers consider too expensive, as well as communicating better the perceived value.
- In public procurement (e.g., schools) access to on-site support was considered more important than training. One organisation (HEC) has tested various measures in a cafeteria and the only one that worked was a price incentive.
- It is essential to finding a term for communication that highlights the work of farmers. A suggestion to not only describe health and environmental benefits but use soil quality to describe the excellence of farmers. There was also discussion whether communication should also cover what happens in conventional production.
- An alternative scheme is to issue a "green card" to enable the purchase of healthy products for those on low incomes, as well as support with cooking skills.
- Community programmes can support nutritional change, which is not only about "price".

The following suggestions were made (in order of priority):

- Introduce incentives or constraints to ensure compliance with the target of 20% organic produce in mass catering, and simplify public purchasing rules
- Increase the perceived value of organic products and clarify the landscape of competing labels: environmental labelling, comparative communication, supervision of greenwashing practices
- A national educational communication campaign, common to all players and supported by the government, based on evidence, targeting health and the environment and comparing with conventional agriculture
- Improve affordability: implement public policies to control margins on organic products and encourage transparency on margins, review taxation (VAT) to favour products with a positive impact
- Develop initiatives to democratise food (Social Security, green ordinance, etc.)
- Increase sales by improving visibility on shelves and online: layout and wide range

#### 5.2.4 Germany

The presentation of national perspectives highlighted that placing organic products also on regular shelves has had positive impact, when used in conjunction with shelf stoppers. Price remains important, but so are other issues, such as sustainability. In the long-term fewer organic scandals, because if they occur, they are frequently associated with all organic products. Increasing the offer of organic was seen as important and retailers should see the younger generation as an opportunity. The Organic Strategy 2030 (BMEL 2023) contains a measure to further expand communication on "organic" (measure 15). The information campaign "bio-na-logo" was developed in response to this measure.<sup>40</sup>

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<sup>40</sup> [https://www.bmel.de/DE/themen/landwirtschaft/oekologischer-landbau/bio-na-logo/bio-na-logo\\_node.html](https://www.bmel.de/DE/themen/landwirtschaft/oekologischer-landbau/bio-na-logo/bio-na-logo_node.html)

The discussion in the German workshop including some critical reflection of some of the results. Participants were not happy about the statement on the slides that a negative portrayal of conventional products should be used, which was not considered to be effective. Also, communication of health benefits of organic products was seen as problematic, because of the absence of evidence and the legal situation. Further points of the discussion included:

- Concerns were expressed that the Green Claims Directive will reduce what is possible in advertising for organic products, which is a major problem.
- Regenerative is not yet so strong on the German market but could become more of a challenge.
- The existing rules regarding regional labelling/origin labelling in the organic regulation were criticised. Some Länder use their own system with their own rules. If this is to be used in a standardised way, clear regulations are needed.
- There is a need for more and different advertising for organic products. Existing advertising is often information-heavy and not sexy enough. At the same time, organic advertising must not only focus on the emotional level but also strengthen trust in organic products and the control system. There needs to be even greater segmentation of consumer groups in advertising.
- The idea of a networking centre for organic advertising was mentioned, with the aim of collecting existing information and findings

The following suggestions were made:

- Make greater use of EU promotion funding in DE. For example, the recent “Bio-na-logo” campaign of the BMLEH was good, but the reach was limited. Public funds might be too limited, so cooperation between politics and the private sector could be a good alternative here, making also use of the private sector budgets for advertising in a coordinated way.
- A good idea would be to coordinate between the communication/promotion campaigns in different member states.
- It was also suggested that more basic research on consumer attitudes is necessary

Remarks from people not able to attend the workshop highlighted that for a transformation of the food system it is essential to not speak to consumers but also to reach the citizen.

### 5.2.5 Hungary

At the workshop results of a national consumer behaviour test were shown as well as a summary of factors influencing the Hungarian consumers. It was also highlighted that there are different meanings associated with different terms for used for organic (ökológiai/bio/organikus), and the confusion from those causes. There is a lack of consumer education in Hungary.

There has not yet been a major promotional campaign in Hungary, one reason being that domestic market players in the small commercial sector do not represent a large enough market share to meet the beneficiary requirements. Other players, such as the Chamber of Agriculture, are reluctant to engage in highly bureaucratic tendering procedures.

The discussion of the status quo at the Hungarian workshop highlighted that there is a lack of research on consumption patterns for organic food in the country, for example how the general public views organic consumption.

Also, there is no information on the composition of the domestic product base. Hungary has a shortage of processors with sufficient capacity for organic and a lack of communication of scientific findings.

There following suggestions were made

- It would also be necessary to encourage consumption and communicate with consumers through the media, possibly involving influencers.

- Cooperation between civil society and the commercial sector.
- Communication campaign.
- The AMC (Agricultural Marketing Service) should take on a greater role, particularly in communication with consumers. The different needs of different generations must be considered.
- Including topics of organic in public education.
- Incentives should be developed (subsidies, grants, possibly penalties) to encourage consumption.
- More should be said about nutritional values, benefits of organic products.

### 5.2.6 Italy

In the Italian workshop the topics of supply chains, consumer information and statistics and market data were discussed together. The slides presented had been adapted strongly focusing on the Italian situation in relation to both topics, as described by the Italian partners and less emphasis on research results of the project.

The national description highlighted among others the following themes:

- Consumers face lack of knowledge about organic agriculture among the general population—there is a lack of co-ordinated promotional campaigns and communication strategies
- Confusion exists over health and environmental brands and claims in the marketplace—there is no current framework for validated health claims on organic labels, and there is insufficient support to research projects and nutrition education programmes in schools regarding nutrition and environmental awareness related to organic agriculture.
- Price barriers persist as organic product prices are not always acceptable to consumers and citizens
- Limited product assortment in the organic basket may restrict consumer choice
- Current consumption patterns show older generations as primary organic consumers compared to younger demographics
- Household consumption and prices data are available from SINAB, but not all products are covered

The following suggestions relevant to consumer information and demand were made (in order of priority):

- Foster consumer price transparency (internalising positive and negative externalities) through True Cost Accounting approaches. Confusion through an increasing number of green/sustainable food labels on the market, making it difficult for ordinary consumer to have a clear understanding of differences (greenwashing concerns). Will the new Organic Made in Italy logo contribute to such confusion? There is a need to enable fair rewards for organic producers' efforts and consumers' informed purchases.
- Promote effective communication to consumers about different sustainable/green agriculture production methods (agroecological, regenerative, zero-residue, etc.)
- New branding strategy—Creation of "Organic Made in Italy" logo with dedicated resources from MASAF
- Large-scale public awareness campaign to promote organic consumption
- Introduction of nutrition and environmental education in schools

### 5.2.7 Romania

The status-quo description reflects the situation well, especially in relation to the need for stronger government-led communication with increased budgets, also in partnership with organic and food sector and simplification of food-labelling, ensuring appropriate recognition of organic attributes concerning health, environment and welfare.

The presentation of the national situation highlighted limited information on consumer behaviour and the impact of the measures.

Concern was expressed about how to combat greenwashing, how digital technologies can be used to increase traceability, the role of relevant labelling and the use of social media. It was agreed that communication aimed at consumers should be reinforced by farmers communities and public sector.

No other specific suggestions were reported.

## 5.3 European perspectives

### 5.3.1 EU Commission interviews, Autumn 2025

Interviews were conducted in September and October 2025 with representatives from different units within the European Commission covering the different themes in this report.

No specific interviews were held covering consumer demand. The European logo was raised in some general interviews, pointing out that the fact that it is special in so far as it is a genuine certification logo representing legal recognition of the certification system, which sets it apart from other certification labels. The Eurobarometer documents that the logo is well known, achieved without substantial promotion effort. However, it was recognised that more work is needed, which might be cost effective for the organic sector.

### 5.3.2 Organic Summit, Copenhagen, August 2025

The Organic Summit (Anon 2025) was held as part of the Danish Presidency of the European Union and brought together organic sector stakeholders and policymakers from many countries. Many of the themes and policy recommendations discussed during this conference, including those featured in the Conference Charter and the Session summaries, are relevant to the work in the OrganicTargets4EU project and are therefore considered in some detail here.

Consumer communication featured in the conference Charter and was mentioned in several session of the Organic Summit. Strong organic labels and organic food in public and private meals are among the recommendation of the Conference Charter (Anon 2025). Arguments that were made included:

- Certification ensures credibility, fairness, and consumer trust through shared international standards
- Clear labelling can be a trust builder, as shown by the Danish Organic label
- Communication should connect “organic” to tangible experiences for consumers, such as animal welfare or taste
- There is a need for strategies addressing different consumer groups
- Education can help that everyone understands the benefits of organics, with the organic label supporting demand.

Consumer information and demand played a key role in the discussions in the **retail panel**. All panellists agreed that continuous generic promotion of organic food remains essential, especially in times of stagnating demand. This has been neglected in the past 10 years. New generations of consumers/citizens have not been exposed to past generic or retailers’ own promotion campaigns. Consumers have gaps in knowledge, for example in relation to the broad range of environmental and social benefits and too many are not aware of the organic certification system.

A successful example of combining organic with a regional logo was shared from the French region of Nouvelle Aquitaine. Jerome Cinel from Nouvelle Aquitaine also talked about a price calculator tool that helps supply chains to construct a “fair” price to all parties involved. The tool includes all cost at every step of the way and can also be used as a communication tool for all, including consumers.

It was suggested that a broad organic market needs offers that appeal to different consumer segments, i.e., organic offers in different price bands from basic to premium lines. Retailers often service specific segments. For example, Lidl NL entered in the discount/cheap segment and saw their mission in making organic accessible to all. By becoming known as an “organic” retailer, Lidl aims to shift the widespread perception that organic is too expensive.

Highlighted was also that capacity building within the organic sector associations to enable them to negotiate effectively with retailers is important. (Retail buyers are normally very financially and data driven and need detailed information in formats that they are used to reach them.)

The session on the **Danish Experience** panel reminded of the very high recognition of the Danish organics label, the Ø logo,<sup>41</sup> which is known by 99% of consumers and is also an example of how the public and private sectors have collaborated in DK. The following points were raised:

- Promotion of such a label needs to continue. The organic catering label introduced in 2009 (with gold, silver, bronze categories) was financially threatened in 2024 but then saved with the help of a large public campaign.
- The idea of catering labels building on a national logo was copied in Germany and France. The government label was instrumental in reaching 12% of all sales in Denmark.
- Public kitchens not only create demand but can have a role in changing dietary habits, which politicians normally do not really want to engage with.

### 5.3.3 Final OrganicTargets4EU project conference, Brussels, November 2025

At the final conference of the OrganicTargets4EU project, an international audience of stakeholders and policymakers heard about some of the results of the project and a summarised version of the emerging policy recommendations. In a World Café exercise, participants had the opportunity to reflect on the policy recommendation and to identify specific priorities and additional considerations.

In the case of consumer demand and promotion, the discussions focused on improving identification of organic products in the marketplace, and on improved transparency and affordability of organic food. The discussion highlighted the following points

- The need to address greenwashing and weed out some of the claims that are not well supported by evidence (not labels)
- The potential to use green vouchers to encourage organic consumption in specific target groups and in regional and local hubs
- The desirability of an EU consumer organisation with an organic focus

## 5.4 Policy recommendations

Stimulating consumer demand for organic products can be a strategic lever to reach ambitious goals for organic sector development.

The aim should be to making organic an easy and in the longer term the default option for everyday shopping. Increasing consumer demand requires a mix of interventions by different actors in different roles. Policymakers can regulate logos and labelling claims, retail chains influence what products are offered and promoted at the point of sale, and consumers can force change by voting with their money.

There is a need to develop effective strategies to encourage consumer demand through improved labelling and communication, retail strategies, green public procurement, and price transparency.

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<sup>41</sup> <https://organicdenmark.com/danish-organics/danish-organics-label/>



At the **EU-level**, including in any future EU organic action plans, we recommend that the **European Commission**:

**Protect and strengthen the EU organic logo to support consumer demand, in the context of the EU organic regulation, by:**

- Enforcing controls and curbing misleading environmental claims
- Developing guidance on how the EU organic logo can be combined with national/regional ones
- Supporting research about the effectiveness of the use of the organic logo and compulsory indications in the EU in the context of other logos and claims

**Continue EU promotion funding to improve consumer recognition of and trust in organic products and their benefits, by:**

- Coordinating promotion campaigns specifically for organic products in different Member States, in particular cross- country campaigns, and in collaboration with the private sector
- Emphasising the significance of the legal basis for defining organic food production and control systems within the European Union as the only EU regulated scheme for sustainable production with an EU wide logo.
- Encourage the funding of international and national education campaigns about quality attributes, environmental and social benefits of organic food and farming, and build trust in third-party or national certification systems

**Develop guidance on what claims can be used for organic and conventional products, by:**

- Ensuring appropriate recognition of organic product attributes concerning health, climate, environment, and animal welfare using suitable methods that can differentiate production system
- Avoid consumer confusion regarding environmental claims and unreliable sustainability labels
- Encouraging honest advertising about organic food and farming and counteracting greenwashing
- Enabling consumers to compare reliably organic practices and impacts with other sustainability claims and labels and thus protect organic differentiation and align enforcement to reduce greenwashing, and counter the confusion generated by “alternative labels” that dilute the systemic value of organic.
- Providing guidance on what can be said in advertising about the positive effects of eating organic products, within legally permitted contexts

At **national/regional level**, potentially as part of national organic action plans (see Chapter 10) and supported where appropriate by the EU organic action plan, the EU Commission’s recommendations to Member States for the current and next CAP, and the EU CAP Network for sharing best practice, we recommend that **national and regional administrations**:

**Support the private sector in improving the availability and visibility of organic food in retail outlets by:**

- Providing a wider range of organic choices and adjusting assortment as a strategy to increase the share of organic sales
- Improving visibility of organic products through distributed placement (including online), shelf markers and clear labelling, as well as branding and packaging
- Coordinating promotional activities with national/regional campaigns



**Support the private sector in improving the availability and visibility of organic food in catering outlets by:**

- Introducing clear labelling rules for organic ingredients in public and hospitality catering (e.g., Denmark's catering label with gold, silver, and bronze status)
- Setting goals on increasing proportions of organic food in public catering in line with the growth targets at MS level, considering also a gradual percentage increase (e.g., by 1% every year)

**Support the private sector to improve price transparency and affordability of organic food by:**

- Implementing public policies to control excessive margins on organic products and encourage price transparency
- Improving data on organic product availability and prices (see also Chapter 8)
- Considering reduced taxation (VAT) on products with a positive environmental and health impacts
- Encouraging the development of tools that help supply chains to construct a fair price to all parties through research and innovation funding.

## 6 AKIS: Advice, mentoring, education, and training

The Agricultural Knowledge and Innovation System (AKIS) concept describes the network of actors, organisations, and institutions that generate, share, and use knowledge and innovation in agriculture. It represents a holistic and dynamic approach to fostering innovation in agriculture through interconnected networks that integrate research, education, advisory services, and practical experience across various public and private actors (World Bank 2012). In Europe, the AKIS concept has been influenced by the SCAR-AKIS working group and integrated in the Common Agricultural Policy (CAP), particularly through the Integration of the European Innovation Partnership for Agricultural Productivity and Sustainability (EIP-AGRI) (Sutherland et al. 2023) with knowledge creation also supported in Horizon Europe and other research programmes. In this chapter we mainly consider AKIS support measures rather than a broader AKIS concept that sees the farmer at the centre of it.

Achieving ambitious goals for organic farming requires an easily accessible organic knowledge and innovation system (AKIS) (EU SCAR-AKIS 2019; Reinecke et al. 2024). Whilst there has been considerable effort in organic research in Europe, not all the knowledge has been reaching farmers and advisors. Farmers and advisors are also important contributors to knowledge creation. That knowledge exists is demonstrated by examples of good practice on farms and in some regions. But this knowledge is not available for the main actors of AKIS and for a larger number of farmers/advisors. Knowledge on organic farming is often fragmented, difficult to access and insufficiently tailored to the day-to-day needs of farmers and advisors making access to and exchange of knowledge important tasks for a well-functioning AKIS for organic.

The chapter covers advisory systems and mentoring, as well as education and training. The following Chapter 7 investigates knowledge creation, namely research and innovation, also considered to be part of AKIS.

### Advice, mentoring, and information

The need to support farmers during conversion and as established organic farmers has long been a recognised area for policy intervention. Advice becomes a crucial component supporting the sustainable growth of the organic sector. Frequently cited is that organic and other low-input forms of agriculture reduce inputs and replace them with knowledge, making a functioning information and knowledge system particularly important.

At EU level, discussions about advisory provision mainly take place in the context of AKIS and the Farm Advisory Services (FAS). The responsibility for advisory provision lies mainly on Member States, with some common rules and some interventions included in CAP, but there is no detail on how organic farming knowledge and innovation should be supported in AKIS or in FAS.

### Training and education

The training and education system is also an important part of AKIS. Education here refers to acquiring broad knowledge, skills, and qualifications from institutions ranging from schools to colleges and universities. Training is more targeted, often more short-term and aimed at gaining specific, professional knowledge and skills, for example in Continuous Professional Development (CPD). To reach the goal of 25% organic farming, training/CPD courses in various organic topics for farmers, advisors and other professionals are particularly important.

Frequently mentioned in the context of organic farming is the education of school children to raise their awareness of how food is produced and what organic methods involve and contribute. Organic content in further and higher education at agricultural schools, colleges and universities is also important.

The main responsibility for education and training in the EU also lies with the Member States. The Directorate-General for Education, Youth, Sport and Culture (DG EAC)<sup>42</sup> is developing policies that contribute to a knowledge-based, inclusive Europe with a competitive economy. DG EAC runs several programmes, such as Erasmus+<sup>43</sup> and the European Institute of Innovation & Technology (EIT)<sup>44</sup>, which also have activities related to food systems with funding managed by a European Agency. There have been a range of Erasmus+ programme addressing some topics of organic farming, but to our knowledge these have not been systematically evaluated.

## 6.1 Project results and policy context

### 6.1.1 Project results

AKIS related projects were covered in the OrganicTargets4EU project mainly in WP1, which involved a first assessment of AKIS for organic farming, aquaculture and value chain actors (Nagy et al. 2023), and WP5, which provided a more in-depth analysis of barriers to conversion and recommendations for strengthening organic advisory services and capacity building (Padel et al. 2025). The WP1 synthesis report concluded that a key lever to enhance organic sector development is to fully integrate organic farming into all sections of AKIS (Reinecke et al. 2024).

#### Specific results related to advice

The WP1 review of policy support in the EU Member States (Lampkin et al. 2024) states that many National Organic Action Plans include some measures in support of advice. For example:

- Conversion advice specifically mentioned in BE-W, CZ, LU
- Specific mention of aquaculture in CY, EE, IT, PL
- Practical demonstration widely mentioned (e.g., field days, demo farms)
- Some countries want to introduce free or supported advice, e.g., BG, CZ, DE, IT
- Several countries want to raise awareness of organic in farming community (e.g., FR) or among young farmers (e.g., HR).
- EE specifically mentions entrepreneurship and mentoring system as an action
- IE and LV specifically mention discussion groups
- NL specifically mentions using Farm Advisory Service for organic
- DK has system of conversion checks to help farmers decide whether to convert

The synthesis report of key drivers and lock-ins (Reinecke et al. 2024) presents the following lessons regarding advisory support:

- **Knowledge and capacity building are key:** In contrast to 'normal' innovation, organic farming is a highly complex multi-level knowledge system (Padel, 2013; Simin & Janković, 2014 cited). Various actors need information, education and capacity building with a particularly steep learning curve at the beginning of conversion. In addition to formal advisory and training systems and organic farming institutions, informal networks and peer groups are key for capacity building and the development of organic farming. However, seeing the role of values, attitudes, identities or social norms in this respect, information and education or related policy tools may be too limited or slow to exert an immediate impact.
- **Organic farming associations** are key players in the knowledge system for organic, as well as for lobby activities and market development. Participation in organic farming associations helps with organic identity building. How important the organic farming associations are and their recognition

<sup>42</sup>[https://commission.europa.eu/about/departments-and-executive-agencies/education-youth-sport-and-culture\\_en](https://commission.europa.eu/about/departments-and-executive-agencies/education-youth-sport-and-culture_en) (accessed 10.12.25)

<sup>43</sup> <https://erasmus-plus.ec.europa.eu/> (accessed 10.12.25)

<sup>44</sup> <https://www.eit.europa.eu/> (accessed 10.12.25)

by policymakers varies from country to country. A considerable number of organic farmers “go it alone” and are not member of organic farming association (Reinecke et al. 2024).

The report on barriers of conversion and recommendations for strengthening organic advisory services (Padel et al. 2025) included a review of organic sector development trends—ranging from rapid expansion in some countries to declines in others and high prevalence of partial conversion in some countries and sectors—underscore the importance of context-specific strategies and the influence of external economic factors pressures, such as food price inflation and shifting policy landscapes. It highlighted the following points:

- **Peer-to-peer networks** emerge as an important approach for knowledge exchange for farmers as well as for advisors. For farmers these can provide inspiration and opportunities for exchange of practical and technical knowledge but can form the basis for developing regional collaboration and joint marketing. However, they are rarely fully recognised or supported financially in the national AKIS support measures.
- **Broaden the topics covered:** Advisory services mostly cover technical aspects of organic production and support for compliance and administration (e.g., applications for CAP payments and organic farming support schemes). The need for developing holistic farmer support by integrating climate resilience, financial management, supply chain development, digitalisation, and regulatory guidance were highlighted for the future.
- The need for **improved training of advisors**, broadening of expertise, and accessibility/ affordability of advice.
- **Securing stable and sustainable funding mechanism** for advice is one important need for the future, especially in relation to information and advice supporting public good delivery of farms
- One **limitation** of the work is the qualitative approach that can highlight factors that are potentially influential but cannot establish how widespread these factors are and how important they are considered to be by specific groups of farmers, such as those interested in-conversion, in conversion, or part-organic (Padel et al. 2025).

The main conclusions of the project work in relation to advice (see Section 6.1.1) can be summarized as follows:

- Advisory support is important to encourage more conversion.
- Advisory support for organic is very variable across the EU and across the focus countries. Public and private organisations offer services only for organic or for organic and conventional clients.
- Organic farming associations are key players in the knowledge system and for identity building, as well as in lobbying and in market development.
- The number of advisors working with organic farming in EU/MS is not known.
- Some measures for advisory support are included in the CAP, but implementation in MS in organic context not known.
- There is a strong focus on production themes in advisory work, less on business, markets and environment.
- Advisors spend a substantial share of their time supporting administrative compliance, particularly applications for CAP support, such as farm income and organic support schemes (see Section 6.1.2).

### Specific results related to training and education

Apart from general mapping of AKIS provisions, the OrganicTargets4EU project has not carried out any systematic research related to education and training for organic farming in the EU27. The report on AKIS provisions summarises the situation regarding training and education as follows (Nagy et al. 2023):

### Training courses (continuous professional development)

- For farmers and other professionals, organic farming and related topics are offered both from the private sector (e.g., organic farmers association) and from some public actors
- R&I projects (EU and national) are important for knowledge exchange and training, this is particularly important in some countries where other provisions are limited, e.g., HU and RO.

### Basic education at schools and universities

- In most focus countries basic education in organic farming is available through some modules introducing organic farming at schools and universities
- Some countries (e.g., DE, DK) offer BSc and MSc level courses in organic farming and/or agroecology. A two-year European MSc programme in organic agriculture and food systems is jointly offered by universities in Denmark, Germany and Austria.<sup>45</sup>
- Focus on farmers, some including advisers and staff working in public catering

Nagy et al (2023) further highlight that a lack of organic curricula in agricultural schools and universities to educate future farmers and advisors was observed in all focus countries. This leads also to limited outreach to non-organic actors, a limited availability of educated and skilled advisors, and lack of interest in considering organic farming as a valuable topic in training farmers. They recommended that organic curricula should be implemented in education, and that centralised coordination for organic education and training in agricultural schools and universities should be aimed for (Nagy et al. 2023).

The importance of education and training for further development of the organic sector is also indicated by inclusion in most current national organic action plans (except DK, ES-AND) (see Lampkin et al., 2024). National organic action plans mention training for advisors, for farmers, for all actors in supply chains and at all levels. Higher education is mentioned directly in nine countries and school education in six. Also mentioned are knowledge exchange opportunities and knowledge transfer, and skills and curriculum development. (see Lampkin et al. 2024 including Annex 9.4). Also, the 2021 European Organic Action Plan promotes exchange of best practice for curricula, courses, material etc.; innovative solutions targeting production, processing, retailing, consumption; equivalent initiatives for aquaculture (Axis 2 on stimulating conversion and reinforcing the entire value chain under point 9.2 (EC 2021).

## 6.1.2 Other related research

### SCAR-AKIS reports

The SCAR-AKIS working group published a policy brief on the future of advisory services in 2016. This covered affordability, the need for systems-oriented, impartial and farm-tailored advice, with advisors well connected to AKIS. They saw a need to change from linear knowledge transfer roles to coaching and accompanying peer-to-peer processes, including the use of IT tools but also face-to-face. The detailed recommendation also covered criteria for becoming an advisor and how to shape an advisory system ready for the future (SCAR-AKIS 2016).

The SCAR AKIS working paper on strengthening AKIS in Europe from 2019 analyses the current situation and highlights four groups of actions as successful AKIS strategies (EU SCAR-AKIS 2019):

- Enhancing knowledge flows and strengthening links between research and practice.
- Strengthening all Farm Advisory Services and fostering their interconnection within the AKIS.
- Enhancing cross-thematic and cross-border interactive innovation.
- Supporting the digital transition in agriculture.

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<sup>45</sup> <https://www.eur-organic.eu/en> (accessed 10.12.2025)

In relation to training, the report from 2019 highlights in particular the role of H2020 thematic network projects that support the acceleration and exchange of existing knowledge across the EU, including making educational courses more up to date, but does not provide any evidence about impact on the educational sector. The need of strengthening knowledge flows with all AKIS actors—including education—is highlighted, as is the need to train advisors regularly, including in new topics and soft skills to support innovation. Ministries involved in education should be involved in implementing national AKIS strategies (EU SCAR-AKIS 2019).

### European Networking activities

The Common Agricultural Policy (CAP) and EU R&I Programmes (e.g., Horizon 2020 & Horizon Europe) work in synergy to support sustainable and innovative agricultural practices and to build an effective AKIS in the Member States, under the common framework of the European Innovation Partnership for Agricultural Productivity and Sustainability (EIP-AGRI)(EU Commission 2025c). A 2025 cluster event brought together four AKIS-related projects (PREMIERE, MODERNAKIS, ATTRACTISS, EU-FarmBook) with representatives from other Horizon Europe projects along with policy officers from DG AGRI and project officers from REA. The following conclusions of the event (EU Commission 2025c) appear relevant also for AKIS for the organic sector:

- Mapping and reaching advisors across all EU Member States (MS) remains challenging and requires enhanced collaboration with existing networks and governmental bodies.
- Outreach should not be limited to public impartial advisors but should include a broader spectrum of advisors and help build engagement with both public and private advisors. This can be further supported by developing accreditation mechanisms for advisors.
- It should be recognised that advisors can have information overload.
- Participating advisors and farmers should be recognised as active contributors to knowledge creation in projects and financially compensated for their time and expertise.
- There is a need for targeted training and educational certification of advisors, for example through Massive Open Online Courses (MOOCs) etc. Advisors should be able to select their own training events.
- Investment in digital tools and long-term repositories should be maintained continuously, ensuring regional adaptability and language support beyond the most common EU languages to share and preserving project outcomes. There is a lack of viable business models / funding for knowledge hubs etc., beyond project lifetime and of explicit guidance on how to produce high-quality, practice-oriented outputs.

A networking event of the EU CAP networks in Italy highlighted the importance of on-farm demonstrations for peer-to-peer learning and innovation' and concluded that more can be done to better integrate on-farm demonstrations in AKIS, and that this tool deserves greater visibility in future (EU CAP Network 2025).

### Reports of the OrganicAdviceNetwork<sup>46</sup>

The ongoing OrganicAdviceNetwork project has **mapped advisory service providers for organic farming** through a survey between November 2024 and February 2025, with more than 300 voluntary responses covering most EU Member States. Responses included those from public and private organisations and some NGOs. Most common services offered were technical advice and assistance for grant applications and conversion (Ayduymuş and von Münchhausen 2025).

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<sup>46</sup> <https://www.organicadvicenetwork.eu/>

An analysis of **CAP and other funding** sources supporting advisory services for organic farming (Szépkuthy and Jobbágy 2025) lists the following CAP interventions as most relevant: knowledge transfer (KNOW), cooperation (COOP including operational groups of EIP-AGRI), and sectoral measures (ADVI1, TRAINCO, COACH, ORGAN, ADVIBEEES). In the 13 Member States studied advisory-related interventions are frequently included in national CAP Strategic Plans, but their design, uptake, and funding levels vary considerably. Some countries do not allocate CAP-funds to knowledge transfer intervention (e.g., Denmark, BE-Wallonia) but maintain good advisory provision with national and private funding. Several interventions targeting producers as members of producer groups or cooperatives are not implemented at all MS (e.g., ORGAN, ADVI1, COACH, TRAINCO interventions) (Szépkuthy and Jobbágy 2025).

A **mapping of educational pathways to become an advisor for organic** covered 14 European countries including Switzerland (Lesieur et al. 2025). Pathways to become an advisor for organic are varied. Many have a BSc or MSc degree, but it is not known for all countries what qualifications advisors working with organic farming hold.

At academic level, educational offers specific to organic farming (bachelor's or master's degrees in organic) were found in five of the 14 countries, while others have related degrees (agroecology, sustainable land management) and more universities offer modules in organic for interested students. It is, however, not known whether advisors working with organic farming attended those degree courses.

Continuous Professional Development (CPD) helps equip advisors with up-to-date knowledge and skills but remains challenging in several countries.

Good examples of educational provision include:

- the ABCD Bachelor<sup>47</sup> in France, which is a one-year specialisation to become an organic farming advisor, offered on five different campuses,
- the European MSc in organic farming<sup>48</sup>, offered in collaboration by agricultural universities in Austria, Germany, France and Poland (Lesieur et al. 2025).

### Other work

An evaluation of a UK based farmer mentoring programme related to pasture management in protected landscapes in five national parks in Northern England showed very clear evidence of farmers willingness and confidence in making changes in their practices (reduced fertiliser use and feed purchasing) because of engaging in a peer-to-peer mentoring programme over a 12-month period. Costs occurred to support facilitation and training of farmer-mentors and were like those for consultant-based projects. Communication between the farmers was through visits and WhatsApp, which allows easy image sharing. The evaluation results showed clear benefits in farmer welfare (using an established scale to compare the time of joining with the end of the project (Norton 2025).

### 6.1.3 Development needs, challenges, and policy gaps

Across Member States, the main development need is to make organic advice, training, and education a visible, resourced, and specialised part of AKIS, rather than assuming generic systems will cover organic needs.

The results confirm that advisory services for organic are often fragmented, short-term and project-based, leaving farmers without stable support during conversion and later farm development. Many

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<sup>47</sup> ABCD Agriculture Biologique Conseil et Développement [Organic Agriculture, Advice & Development]

<sup>48</sup> <https://www.eur-organic.eu/en> (accessed 19.12.2025)

countries lack an overview of how many advisors work with organic topics and clients. Databases do not flag organic competence, reducing transparency and farmers' ability to find qualified help.

Challenging is also the very narrow advisory content, which focuses mostly on production and compliance, while farmers also need support on accessing markets, understanding the financial change, climate resilience, soil and water management, digital tools, and supply-chain development. Lacking is often also a specific focus on conversion which can help farmers reach sound decisions whether conversion is the right choice for them (see DK example of free conversion checks for farmers interested in organic<sup>49</sup>). In this context it is also necessary to reflect on which considering which themes in organic farming are in the public interest (e.g., producing public goods and agroecological practices) and should be publicly funded (e.g., through free service or voucher systems), in contrast to topics where farmers can expect financial gain and can therefore be expected to pay for services.

Training systems in organic for advisors are poorly developed in many countries. Existing CPD systems rarely guarantee exposure to organic topics, and formal education (vocational schools/universities) often lacks organic curricula. This creates a cycle where new advisors enter the field with limited organic-specific competence and practical experience.

Farmers rely heavily on fellow farmers for trustworthy knowledge, and they also need inspiration, for example from seeing other organic farms that work well and where they can ask questions. Yet, policies rarely fund or formalise peer-to-peer exchanges and networks, despite their role in innovation and social support.

Organic farming associations emerge as central actors in the organic knowledge and advisory ecosystem. The project shows that they are often the most trusted and competent providers of organic-specific information, playing a role in advisory support, and organising training, peer-to-peer exchange, field days, and mentoring. They can also connect farmers with researchers and policymakers. In many countries, they compensate for gaps in public advisory systems—especially where general AKIS structures lack organic expertise or where independent organic advisors are scarce. Associations also play an important role in market development. However, their contributions are not always formally recognised or supported by national AKIS frameworks, and their integration into public funding structures varies widely.

#### 6.1.4 Specific policy context for advice and training as part of AKIS

The **SCAR-AKIS working group** has analysed the current situation of AKIS in Europe and how to better support the transition of agriculture to more sustainability, with particular emphasis on interactive innovation. A good AKIS creates an innovation ecosystem by enhancing knowledge flows between all AKIS actors and by fostering co-creation between research and practice. As such AKIS is not limited to supporting agriculture but also rural areas, value chains, environment, climate, biodiversity, society, consumers, etc. All advisors should be integrated into AKIS in an inclusive way (SCAR-AKIS 2016; EU SCAR-AKIS 2019; Defour 2021).

The **EU Commission Vision for Agriculture and Food** (EU Commission 2025a) highlights the need to address skills shortages and mismatches in the farming sector. It foresees the need for dedicated investment in high-quality training and advice, which will be important for attracting a new generation of talented farm entrepreneurs, and building a competitive, sustainable and resilient agriculture and food system. The need to continuously strengthen AKIS is recognised: *"The Member States need to put substantial efforts into strengthening Agricultural Knowledge and Innovation Systems (AKIS) and match resources with the broader range of needs faced by the sector, in particular to better support farmers in their transition to sustainability"* (EU Commission 2025b, p. 26). The vision also refers to the forthcoming

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<sup>49</sup> <https://organic-farmknowledge.org/tool/54947> (accessed 12.12.25)

Union of Skills driving a more strategic approach to inclusive lifelong learning and skills development in agriculture and making the most of the tools at disposal to reposition farming as an attractive and rewarding career choice but without providing further detail.

According to current legislation on the **CAP Strategic Plans** (EU Regulation 2021/2115) Member States are obliged to include a system providing services for advising farmers and other beneficiaries of CAP support on land management and farm management. The Farm Advisory Services (FAS) shall cover a range of topics, including environmental issues, innovation and the provision of public goods. In addition, Member states must detail their plans regarding AKIS (EU 2021). Member States should also offer training of advisors in innovation support as well as technical and sustainability themes, support or create knowledge reservoirs and encourage researchers to create positive impact in the agricultural sector (Defour 2021).

Despite reference in European policy for several years, the AKIS concept might not have reached all actors in the agricultural sector or along an agricultural value chain (Knierim et al. 2015). And it must be recognised that the switch from a linear knowledge transfer model to interactive innovation is challenging to many actors and is likely to take some time. Throughout the lifetime of an innovative project advisors would be involved in capturing bottom-up ideas at a grassroots level but also disseminating the knowledge gained through the project. This involvement in innovation can make it more attractive to be an advisors (Defour 2021).

The **proposal for the future CAP** from 2028, published by the European Commission in July 2025 (EC 2025), builds on the experience of the first AKIS period in the CAP, with the aim to clarify and simplify the process, but not proposing fundamental change to the provisions for EIP AGRI, AKIS, and the Farm Advisory Services (FAS). Member States (MS) should improve access to impartial and suitable qualified advice for farmers (e.g., through a public database of advisors) and implement Farm Advisory Services (FAS), covering specific themes that include farm stewardship, setting-up, transfers of holdings, business management, innovation, and digital tools. Awareness of social and mental health issues should be raised. Article 19 states that MS should also support preparation and implementation of EIP AGRI operational groups, uptake of project results and promotion of innovation, training and skills, and advice and advisory services. Training is mentioned specifically for young farmers. The relevant Articles 16, 17, 19 and 20 do not mention organic farming, but organic is recognised as one of the actions beneficial for the climate, environment, animal health and sustainable forestry (Art. 4), and possible interventions also include a transition fund that could include advisory support (Art. 10) (EC 2025).

In the new proposal, the CAP is integrated within the Fund for **National and Regional Partnership** (NRP) Plans, which now merges several previous funds, including ERDF, Interreg, Cohesion and Fisheries (see also Chapter 1). Within that certain budget positions are ringfenced, but the proposed ringfencing of CAP interventions does not include AKIS or LEADER, leaving it up to MS to decide on priorities and set budgets for these interventions. (see also Modern AKIS 2025).

One further European programme related to education and training is **ERASMUS+**, which is set to receive a significant funding boost in the 2028–2034 MFF, with a proposed budget of €40.8 billion marking a 50% increase from the previous period. The database of past projects shows more than 500 ongoing and completed Erasmus+ projects found using the keyword “organic farming”<sup>50</sup>. Opportunities to support organic farming training and education utilising this fund should be explored. For example, the flagship initiative “Erasmus for Young Entrepreneurs (EYE)” can support generational renewal in farming, allowing new and young farmers to gain vital business skills, confidence, and networks by working with experienced entrepreneurs in over 40 countries. Networking and skills training could support young organic farmers specifically. The Commission aims to boost visibility in rural areas so

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<sup>50</sup><https://erasmus-plus.ec.europa.eu/projects> (accessed 12.12.25)

more young and new farmers' benefit (EU Commission 2025d). Relevant to skills development are also all initiatives in the Pact for Skills, which includes partnerships of educational providers in the Agrifood Ecosystem<sup>51</sup>.

Four policy options appear to be relevant for supporting the further development of activities for organic farming in AKIS:

- Current CAP: better use funding opportunities under Pillar 2 in relation to Farm Advisory Services (FAS), knowledge transfer (KNOW), cooperation (COOP including operational groups of EIP-AGRI), and for organic producer groups with sectoral measures in Pillar 1.
- CAP from 2028: funding for Farm Advisory Services, knowledge exchange, EIP AGRI operational groups and innovation in the context of AKIS in the CAP, including and knowledge exchange interventions
- A future EU Organic Action Plan
- ERASMUS+, e.g., programme for young organic farmers as part of EYE flagship and Pact for Skills for training and education in organic

## 6.2 National perspectives

As part of the national policy workshops undertaken in WP7, for each theme participants were presented with some key findings from the project results, with associated development needs and policy challenges and options identified, as well as national perspectives prepared by the workshop organisers drawing on local knowledge and documentation including national support programmes and organic action plans. Development needs identified in earlier national workshops in the project could also be integrated. In this section, we summarise the key outcomes for each topic from the national workshops, based on the documentation provided by the workshop organisers.

### 6.2.1 Austria

#### Advice and mentoring

Austria has a well-developed and highly accessible advisory system in the organic sector. Advice is offered for conversion to organic, improving organic production in line with the organic rules, support of innovation, biodiversity, climate resilience and soil health as well as support in grant applications. Advice is provided by organic organisations, the regional agricultural chambers and private operators. Organic farms are present in all regions of Austria, and experienced fellow farmers are a very valuable source of information for organic newcomers. Although the Austrian organic advisory system is comprehensive and well structured. Strengths of the system are national coverage, high acceptance by farmers that make regular use, practical experience of advisors and good connections to research. Weaknesses are high administrative demands, lack of resources and lack of specialists (e.g., vegetables, agroforestry) and some limitations in training and education of organic advisors.

The description of status-quo and development needs was seen as reflecting well the national situation. Attendees believed there was no need for long-term advisory support of farms. The discussion further raised the following points:

- The networking of advisors across institutions was considered very important, but there were some doubts, whether advisors would have the time to take part.

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<sup>51</sup>[https://pact-for-skills.ec.europa.eu/about/industrial-ecosystems-and-partnerships/agri-food\\_en](https://pact-for-skills.ec.europa.eu/about/industrial-ecosystems-and-partnerships/agri-food_en) (accessed 12.12.25, see also The Agri-Food Ecosystem)

- A qualification system for advisors exists, mainly focused on methodological tools, but this does not include in-depth technical training, which was considered very important by participants. Lack of time to take part in CPD training was offered as a reason for low participation.
- Peer-to-peer networks of farmers could be extended. A grassland farmer cluster from an EU project was considered a good example.
- A specialist topic is vegetable production in glasshouses, where demand is higher than supply. Exchanges with other countries (e.g., NL) were considered valuable.

Suggested policy recommendations (in order of priority):

- Network and exchange between advisors, farmers, researchers, teachers
- Establish and strengthen Peer-to-peer groups for farmers (and advisors)
- Better technical education for organic advisors

### Training and education

Training and education in organic farming in Austria includes a number of actors, such as: the agricultural college Bioschule Schlägl<sup>52</sup>, which offers 3-year technical courses in organic farming; the BioAkademie offering adult education courses; several of the Higher Federal Teaching and Research Institutes for Agriculture (HBLFA) offering training courses for farmers; an MSc Degree course in organic agriculture at BOKU, Vienna; and several other bodies offering short-term courses and workshops.

The current Austrian curriculum for agriculture has a competence-oriented approach that allows the head teachers at agricultural schools to focus on organic farming and gear the entire education towards it, for example the Bioschule Schlägl. This college is well received and has more applicants than it can offer places.

Overall, the number of hours dedicated to organic farming at agricultural colleges, varies from college to college. The workshop participants considered one existing gap to be training for organic master-craftsmen (Meisterschule).

Austria has a well-established course for organic agriculture at university level, but the number of applicants has been declining in recent years. Recruitment of lecturers with organic competencies can sometimes be a problem.

The following suggestions for improvement were made:

- Teachers (at all levels of education) should have the opportunity to exchange with researchers and “organic research must come into schools and colleges”
- Training opportunities alongside supply chains very important.
- Better coordination for organic across all levels is very important.

### 6.2.2 Denmark

The Danish workshop did not discuss the topics of advice and mentoring or training and education. The organisers of the workshop were satisfied with the current provision and did not consider them to be urgent topics in the context of organic sector development.

Denmark has a long-established, structured, and professionalized advisory network. Its AKIS model combines participatory and top-down approaches, with early integration of organic into general advisory services. The project partner ICOEL (Innovation Centre for Organic Farming) is an important actor for organic in AKIS (Szépkuthy and Jobbágy 2025).

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<sup>52</sup> <https://www.bioschule.at/> (accessed 12.12.25)

Denmark has an existing service of conversion checks for farmers that are carried out by advisors. These checks are free to the farmer and there is a set protocol for preparation, the visit, and the follow-up (see Padel et al., 2025 for more details).

### 6.2.3 France

#### Advice and mentoring

France has a diverse and multi-layered advisory system with many different actors, though their effectiveness varies. Chambers of Agriculture and organic farmers organisations (e.g., FNAB) are the strongest advisory bodies, with high availability, high competence, and medium affordability.

Other bodies such as the Technical Institute for Organic Agriculture (ITAB), the French Agricultural and Environmental Research Institute (INRAE), and regional experimentation platforms, are best in terms of competence but have limited availability. Social media and digital platforms are the best in terms of availability but not often in terms of competence (medium) and affordability (digital platforms only). Peer-to-peer initiatives are also the widely available (but less than social media) and most affordable but not often competent (medium). Fellow farmers are a widely available and affordable resource, though their technical expertise varies. Private advisors have mixed levels of competence and affordability, making them useful but not dominant players. Government and public players provide limited but affordable advisory services. Certification bodies can provide information about regulatory and technological issues of organic farming but not advice.

In the French workshop, the status-quo and other slides presented were considered relevant in the French context, apart from the proposal for certification of advisors, which has not been discussed in France. Participants felt that the topics least covered in the advisory system at present were (1) market issues and opportunities, (2) the current economic crisis in organic farming, (3) advice covering the whole farm level and (4) adaptation to climate change (particularly through breeding), as well as biological aspects of soil quality, organisation of work after conversion to organic farming, and the impact of organic practices on the environment.

The following points were discussed:

- Collaboration between consultancy services is important in countries where such services are in competition, which is the case in France. This could be supported at regional level through the funding of hybrid services.
- Farmers have financial as well as time constraints to use advisory services, e.g., they would need a replacement at home to attend courses away from the farm.
- There is a need to recognise that there can be multiple forms of organic farming and that conventional farmers are also an important target group for advisors
- There is a need to include topics going beyond the farm-gate (e.g., processing)
- Training of advisors is necessary and there is strong reliance on state funding for it.

The following suggestions for policy recommendations were made (in order of priority)

- Provide better funding for monitoring and development of advice, so that advisors have time to interact with R&D and with their peers, also for passing on own knowledge and skills at the time of handovers (e.g., retirement)
- Extend the range of services beyond production, to include financial services, market access, certification and climate change and the provision of public goods (covering production, processing, marketing, and catering)
- Consider the role of artificial intelligence (AI) and decision-support tool in advisory practice. Support advisors' skills in using these tools in their advisory work

- Make advice more financially accessible by means of financial schemes (e.g., "agroecological" vouchers enabling farmers to choose the structure or service that will support them including for collective support arrangements. This could consider the certification of advisory services, with differentiated support for farmers who use them)
- Improve the link between advice, research and training at national level by setting up national coordination and encouraging regional coordination + coordination with conventional AKIS
- Provide local authorities with financial and political support for advisory services (agricultural test areas, access to land, easier installation, local funding via organic VAT reduction).
- Encourage the long-term financial stability of advisory structures by making it possible to diversify their sources of funding
- Exchanges between peers on a European level (particularly on the issue of anticipating climate change, e.g., by exchanging with southern countries)
- Encourage the sharing of online knowledge on organic farming at national level by harmonising existing tools (GECO, RDAgri, etc.) and improving interoperability between these databases.

### Education and training

Currently, there is no longer any higher education provision on organic agriculture. In academic institutions more emphasis seems to be paid to agroecology than organic. Also, there is no longer any organic provision at the level of BPREA (Agricultural Enterprise Manager). There was a Massive Open Online Course (MOOC) on Understanding and Questioning Organic Agriculture, which created interest but finished in 2023. Other points of discussion were how to break down the divide between organic and non-organic agriculture in training and how to better understand a trajectory from conventional to agroecology to organic.

The following suggestions were made with high priority

- Include organic farming in more agricultural training courses (LOA), and extend to other types of course (technology, cookery, administration, etc.)
- Make it easier (partly by funding) for farmers to obtain training in agroecology, including organic farming

Medium priority:

- Create a diploma for agricultural advisers in organic farming to enable them to acquire the basic knowledge and skills required of an adviser (accredited training to limit segmentation)
- Reconversion: facilitating access to training, in particular through aid for BPREA
- Work on the organic/conventional continuum; work on transition paths and definitions of farming
- Map AKIS stakeholders and identify knowledge/ organic needs
- Organic education/awareness in general school curricula, from an early age
- Distinguish between organic and agroecology in training courses

Low priority

- Organic farming on all agricultural college farms (100%), with opportunities for experimentation
- Development of higher education courses in agroecology or specific to organic farming, with the establishment of centralised coordination for teaching and training in organic farming in agricultural colleges and universities
- Strengthen training structures with compulsory initial training and continuing training adapted to the needs of advisers (digital, sectoral, support, methodologies, etc.) to adapt to new skill requirements and broaden the field of expertise and the time available for advisers to train (exchanges and tutoring between peers)
- Provide comprehensive knowledge portfolios to trainers and advisors, farmers, etc.
- Relaunch a MOOC on organic farming (for the general public)

- Adapt the brevet professionnel responsable d'entreprise agricole (BPREA) for people from a non-agricultural background (new entrants), i.e., to better understand and meet their needs
- Strengthen the links between agricultural high school farms as a place of demonstration and a link between teaching and farmers

## 6.2.4 Germany

### Advice and mentoring

The Germany advisory system is highly structured but fragmented. Provision varies between the regions; public and private systems co-exist. Advice for organic farmers is provided by organic farmer associations, by state-supported extensions services (in Central and Southern Germany public bodies, in the North-West mainly Chambers of Agriculture; in the East mainly private providers), and by independent advisory services. Competence and affordability vary. Advisors from organic farming associations, independent special advisors, and some government advisors have good competence and reasonable availability, although more limited in the East. Practical learning from demonstration farms, advisory days on farms, and neighbouring farmers remain widely used. Regional and special advisory services, feed advisors, and agriculture companies have low to moderate competence and affordability, making them secondary sources. Federal state authorities play a minor role, primarily for regulatory and financial guidance. There is need to work on common themes (e.g., water management, climate) across regional boundaries and there is lack of specialists (e.g., dairy processing, pulses) also with the public providers/chambers.

The workshop participants considered the status-quo of advice for organic in Germany to be reasonably good. But the situation is also complex, partly due to the federal structure and different providers. Even key actors that have a coordinating role (e.g., FiBL-DE) find it increasingly difficult to maintain an overview.

There is no clear information which *Länder* offer advice on organic as part of Rural Development Programmes. Participants also felt a need to clarify who can claim to be an advisor in organic. Conversion advice funded as part of the Bundesprogramm Ökologischer Landbau (BÖL) was extended until 2023, but it is unclear from published documents whether the service is still available.

In the discussion the following points were considered:

- The onboarding of new advisors into the job was considered to take longer at present than in the past. Candidates bring theoretical knowledge on organic from their education courses but lack practical experience.
- Support for farmers in form-filling for grant applications could be an important service of advisory services, especially public ones, rather than a distraction from other duties of advisors.
- Participants were clear that it is reasonable that farmers as entrepreneurs have to pay for some advisory services: "good advice can also cost money, especially if the company is better off financially as a result". However, the state should offer advice from public funds for the provision of public goods, as companies do not benefit economically from this.
- If conversion is politically desirable, then politicians should also ensure that advice is offered.

No specific recommendations were provided.

### Training and education

From 2016 to 2021, a nationwide study was conducted to determine the extent to which organic farming is considered in vocational training for the occupations of farmers, market gardeners, fruit growers and winemakers. No federal state fully implemented the recommend 80 teaching hours of organic agriculture foreseen in the federal curriculum framework. Only a fifth of all agricultural science

degree programmes had compulsory module with a clear reference to organic farming. The project provided a number of recommendations to give more emphasis to organic farming in education and training and in exams in food and agriculture programmes (John and Beringer 2023). The Federal Organic Farming Strategy 2030 wants to improve training and education for organic food production and processing along the whole value chain (BMEL 2023).

The participants of the German workshop discussed the balance between theoretical and practical content in education. According to the participants many people completing further education courses lack an understanding of the practical aspects of (organic) farming and have no practical experience. There is an ongoing review of training regulations, which BMLEH could provide more details on. The development of curricula for modules at certain levels could support implementation of training at various levels.

The following suggestions were made:

- Universities and other training institutions offer courses on aspects of organic for those interested, e.g., in the form of elective subjects with a prescribed curriculum, as compulsory courses can provoke negative reactions.
- The training needs of other processing craft professions (e.g., butchers, bakers and others) should be considered.

## 6.2.5 Hungary

### Advice and mentoring

The Hungarian advisory system is dominated by informal and practical knowledge sources, with varying levels of expertise and affordability. Fellow farmers are the most available, competent, and affordable advisory or information sources, reflecting a strong peer-to-peer knowledge exchange. Plant protection specialists are competent and widely available, but affordability may be a concern. Input retailers (suppliers of agricultural products) play a key role, offering affordable advice, though their primary interest is sales driven. Farm consultants and registered agricultural advisors are present, but their competence is not particularly high. Soil experts are highly competent but rarely available, making their impact limited. Organic control bodies and researchers play only a minor role, offering low availability and limited expertise. Overall, Hungary relies heavily on practical knowledge from fellow farmers and plant protection specialists, while expert advisors and researchers have less impact. Specialised knowledge (e.g., soil expertise) is difficult to access. Research institutes and specialists are listed as part of the advisory system, but their role appears to be limited and underutilised in direct farmer support.

The status of Hungarian advisory system for organic was seen as good overall, with good records available on the number of advisors and their areas of activity. The Chamber of Agriculture registers advisors and asks them to submit a standard report on their activities every year, and these could provide a basis to evaluate advice provided in the organic sector. There are some programmes supporting technical advice, but in the opinion of the Hungarian project partner these required a high amount of administration and documentation, and requirements might not correspond to the experience in the sector (e.g., in relation to hourly rate).

The discussion highlighted the following suggestions:

- Advice related to markets needs further development. Technical advisors do often not have information/contacts regarding value chains and are mostly unable to help with sales.
- Technical advisors might support partial conversion of farms and rarely recommend (or understand) the need for full farm conversion.
- Higher education and demonstration farms are operating at the same level as 30 years ago and are overburdened. They are therefore not suitable for use as genuine demonstration farms for organic.

- The launch of a domestic excellence programme should be considered.
- There is a need for continuous professional training in organic. Professional advisors must collect a specified number of credit points at accredited professional training events, but these it is possible to attend further training for years without encountering any substantive organic-related topics.
- The problem of climate change is much greater than expected. Organic farming can develop only if the mentioned factors are also taken into consideration. Drought and heat, as well as water management (water conservation, restoring the natural state of rivers and watercourses, preserving inland water areas or the proportion of irrigable areas, or water conservation) are important.
- Organic farming and adaptation to climate change must be learned and knowledge must be created in parallel.

### Training and education

The workshop participants believe that there is no real concept or will on the part of the Hungarian state to engage with this. Neither higher nor secondary education is sufficiently practice oriented and there is a need for more applied education.

There is limited information available on organic topics in secondary school education and there is no strategic consideration of organic in higher education institutions. Some offer organic modules but there is no full-time BSc or MSc courses. One top-op part-time vocational MSc Course in Ecological Farming exists, and one organic MSc training is currently not approved by the relevant ministry. More modules are emerging, including fee-based courses but with restrictive entry requirements. Workshop participants believe that organic content should be delivered to students in a form that they find acceptable.

Vocational training has been transformed in Hungary into dual training, and there are organic farms among the training providers, but little is known about them.

Continuous professional training for advisors is based on a system of credit points (see also section on advisors above). Further training of advisors and their accreditation are not considering the wider range of relevant themes, such as market information, information on product quality and post-harvest operations. More training of advisors/managers may be effective to encourage more conversion in the short term.

The following suggestions were made:

- The Organic MSc degree should be approved by the relevant ministry
- A specialist programme should be developed to ensure CPD training for advisors in organic
- Co-ordination of organic farms that are providers of vocational training
- Organic should be included in general school education to support change in the long-term.

### 6.2.6 Italy

Discussion of all the knowledge related themes including consumer information was held together.

#### Advice and mentoring

Italy has a mixed advisory system, with fellow operators, research institutions and organic producer associations playing key roles. Peer-to-peer innovation and knowledge sharing between organic fellow-operators, individually and in networks, is recognised as having an essential role. Research institutions provide high availability and affordability, but competence can be narrowly focused. Organic producer associations and operators are widely used and competent. Cooperatives are highly competent but

tend to be less affordable and not extensively available. Private consultants and consortia are relatively available and affordable but generally less competent. Suppliers of technical and technological means have moderate competence but relatively low availability and affordability, making them a useful but secondary resource. Control and certification bodies play only a small role, with low availability and competence. Organic district organisations have a very interesting potential that still needs to be fully unlocked.

The national situation is characterised by fragmented and project-based systems lacking an overall vision but with excellence in very specific but narrow themes (e.g., market and climate). There is propensity of some actors for innovation and international networking and positive experience with a small number of EIP groups.

The momentum of the 1980s of wanting to establish a public advisory service for organic has not been maintained. Financial resources are scarce and there is no long-term investment in the sector. Existing services have gaps in important topics, such as market and climate perspectives. The number of technicians that are competent is considered limited. There is a need for improved availability of expert organic farming advisory services covering all the national territory to support smallholder organic farmers that are struggling and help their small organic farms to survive.

The following suggestions were made:

- Support the effective functioning of public advisory services with expert advisors for organic farming and easy and continuous access to services (disparity by company size, geography, sector)
- More opportunities for peer-to-peer exchanges
- Creation of a digital platform to disseminate research and innovation results to organic farmers (e.g., YouTube)
- Creation of a steering committee/agency at the national level to ensure interoperability of innovation information system –recognised as a key factor in a fair and inclusive digitalisation in agriculture
- Creation of regional hubs
- Re-establish priorities for technical assistance measures in Regional Programmes
- Lift the ban on organic inspectors providing technical assistance to farmers operating in other regions (i.e., different to the one where the consultant is working as an inspector)

### Training and education

The current situation is characterized by opportunities in the organic sector's pro-innovation attitude and existing private networks, but also obstacles in form of a lack of education and training opportunities and system fragmentation. The discussion confirmed a fragmentation of AKIS in organic farming and need for coordination and harmonisation mechanisms.

The following suggestions were made:

- More organic education in schools and universities
- More training in organic for technicians & producers
- Setting up of a national hub for the training of expert consultants specializing in organic farming
- Creation of a digital hub to disseminate organic R&I.

## 6.2.7 Romania

### Advice and mentoring

In Romania, the organic advisory system is relying heavily on fellow farmers and traders who are the most available and competent, with moderate affordability. State employees provide moderate competence and affordability, but availability is somewhat lower. Private agricultural advisers and

financial experts are moderately competent but may not always be affordable. Certification bodies and researchers play a small role, offering limited availability and competence. There is a scarcity of advisers at local regional levels and farmers are not guided by local bodies acting like a one-stop shop, able to deliver integrated services in various areas such as digital, transformation, agroecology, financing schemes, market opportunities, etc.

The participants considered advisory support important to encourage more conversion and confirmed the identified development needs and policy gaps. It was discussed that specific themes of the National Action Plan of Romania are missing. It contains several specific themes related to advice, such as conversion advice (including conversion checks), expansion of advisory centres; easier access to advice/ demonstrations; demo farms; information exchange between farmers; RDP AKIS measures; initiatives to support transfer of research results into practice.

Major challenges noted are lack of education and specialized advice; lack of certified advisors in ecological practices and knowledge transfer; need for personalized support during the conversion period. The national project partner has asked Ministry to create a specific place for organic within the Romanian digital AKIS platform (ro.AKIS), using project-based materials, but is yet awaiting an answer. Key actions from the CAP strategic plan related to Transfer of Knowledge (DR37) and other actions under DR38 have not yet been launched.

The role of the OrganicAdviceNetwork project is specifically acknowledged and longer-term funding for this and similar networks would be desirable.

Suggestions include:

- Provisions for Farm Advisory Service in the CAP (Art. 15) should be considered and will strengthen the role of independent and competent advisors.
- CAP will also continue to support EIP AGRI
- Demonstration activities, awareness seminars
- Greater confidence in the examples and experiences of other farmers
- Model Organic districts (bio-districts), discussed recently in Brasov with a group of farmers engaged in Organic Climate Net
- Existence of specific networks at national level

## Training and education

The workshop noted a reduced number of training courses in agroecology in Romania, as well as the need to train actors in the supply chain, insufficient funding for ecological agriculture education and the lack of environmental education in schools. Organic themes and capacities are not specifically discussed in the context of AKIS and that specific staff training is needed (including at schools, colleges and universities).

Major challenges of the National Organic Action Plan are noted as lack of education and specialized consultancy and few public programmes dedicated to training in organic agriculture.

## 6.3 European perspectives

### 6.3.1 EU Commission interviews, Autumn 2025

Interviews were conducted in September and October 2025 with representatives from different units within the European Commission covering the different themes in this report. A draft of the recommendations in this section was discussed with officials from DG Agri responsible for AKIS. It was emphasised that the political context has changed. Whilst the 25% target organic area has not been withdrawn it was emphasised that the focus is now on sustainable development of the organic sector.

It was suggested that we should provide concrete examples of results and point out more clearly where we identified gaps are in the existing provisions that we have identified. Recommendations should be specific where possible and “operational” for whatever level they are aimed at.

Some of the suggestions are already in progress, including in the July proposals, where the continuation of AKIS support is foreseen. This includes interventions related to demonstration farms in the current CAP legislation and in the CAP 2028-2034 proposal. Demonstration farms are already supported and the seminar in June included some examples. There is also provision on training and accreditation of advisors—this is addressed in Art. 20 of the CAP 2028-2034 proposal: MS have to ensure that advisors are suitably qualified and free from conflicts of interest.

There are also existing European initiatives, such as EU-FarmBook to address the question of knowledge hubs. It was suggested that we should not just refer to linking of AKIS actors alone but emphasise the importance of co-creation. In the current database of operational groups there are 172 groups working with organic farming.

### 6.3.2 Organic Summit, Copenhagen, August 2025

The Organic Summit (Anon 2025) was held as part of the Danish Presidency of the European Union and brought together organic sector stakeholders and policymakers from many countries. Many of the themes and policy recommendations discussed during this conference, including those featured in the Conference Charter and the Session summaries, are relevant to the work in the OrganicTargets4EU project and are therefore considered in some detail here.

Improving organic farming through research and knowledge exchange is mentioned in the Conference Charter. The need for collaboration between different actors, and for more knowledge and knowledge exchange, were highlighted in the closing speech of the event.

The topic of advice was covered in the breakout session “Organic farmers—what does it take?”, which concluded that “investments in organic-specific innovation and regionally adapted, affordable tools are crucial, especially for small and mid-sized farms. Farmers and advisors should also have better access to high-quality knowledge and guidance” (Anon 2025). The contributions and the discussion highlighted the importance of financial issues, of administrative issues and of certification. The need for stability and equality in income sources, policy support and rewards for farmers. and the perspective of mixed farming/enterprise integration were mentioned. All farmers in the farmer and industry panel confirmed the benefits of peer-to-peer exchanges for their farms. Other issues discussed in sessions included:

- The need for simplifying organic administration, but without compromising the trustworthiness of certification.
- How outputs could be considered in certification.
- A framework for organic in practice that enables farmers to consider both the public good delivery and producing for the market
- Bio-districts could have a role in mobilising actors at regional level.

The importance of training and education is mentioned four times, including the importance of educational pathways creating opportunities for the next generations, such as Kalø Organic Agricultural College. Specifically mentioned was also the importance of education for consumers to be better aware of the benefits of organic farming, and for public procurement. Training programmes for chefs, procurement staff, and schools—such as Copenhagen’s “Green Chef” or Stockholm’s new training initiatives—help staff make informed choices, reduce waste, and promote organic as the obvious choice (Anon 2025).

### 6.3.3 Final OrganicTargets4EU project conference, Brussels, November 2025

At the final conference of the OrganicTargets4EU project, an international audience of stakeholders and policymakers heard about some of the results of the project and a summarised version of the emerging policy recommendations. In a World Café exercise, participants had the opportunity to reflect on the policy recommendation and to identify specific priorities and additional considerations.

The discussion at the workshop broadly agreed with the draft policy recommendations that were presented. The following points and questions were raised in world café discussions.

Access to quality advice and information:

- How can farmers be encouraged to take up advice?
- The farmers' perspective of what organic can deliver is often not communicated, only research based
- Can mandatory schemes similar to what is offered for input use be copied to organic?
- How can better use be made of existing advisory services?

Integration of AKIS/EIP-AGRI/ FAS

- Is there a role for LEADER local action groups?
- Need to define AKIS for organic
- Need to define the public good benefit of organic (e.g., water quality, carbon storage) for which statutory advice instruments can be used
- Organic associations should register for FAS

Advisors access to knowledge and training, accreditation

- Basic knowledge of organic farming should be required for all advisors, not only for specialists
- Mapping location and skills of organic advisors could create more transparency
- Good organic training for advisors
- Access to validated knowledge platforms
- Education should be encouraged

Encourage peer to peer initiatives

- Lighthouse farms (demonstration farms) are important
- Role of living labs for advice?
- Is there a role for LEADER local action groups?
- Field days for farmers, showcasing organic practice

Specific focus on organic in generic programmes

- Using business activity clusters (as utilised in Romania) and European business platforms (such as European Enterprise platform, European digital platform)
- Using precision agriculture and showing how it applies to organic

General points

- AKIS activities should also be offered to other actors, not only farmers and advisors, such as local authorities, nature conservation/agri-environment officers, bankers (related to financing organic, reduced risks of different options for example in relation to pesticides, better recognition of organic potential).

## 6.4 Policy recommendations

The aim is to embed organic farming as a fully integrated, sustainably funded part of national AKIS, ensuring access to high-quality, specialised advice and knowledge exchange for all relevant stakeholders.

By embedding organic farming systematically into AKIS and integrating organic farming associations as important actors, policymakers can create enabling conditions for farm-level conversion and innovation, considering climate resilience, and broader public-good delivery—far beyond what scattered or project-based measures can achieve.

Member States are encouraged to apply all relevant recommendations in this section at national/regional level, potentially as part of national organic action plans (see Chapter 10), and supported where appropriate by the EU organic action plan, the EU Commission's recommendations to Member States for the current and future CAP (2028-2034), and the EU CAP Network for sharing best practice.

At the **EU level**, including in any future EU organic action plans and recommendations to Member States, we recommend that the **European Commission**:

**Encourage EU Member States to improve farmers' access to affordable and up-to-date technical, business, marketing and environmental advice relating to conversion to and continued organic farming, using interventions of the current and future CAP, by:**

- **Ensuring that organic farming is identified as an essential topic for AKIS** measures and Farm advisory services (FAS) in all Member States, including advice on the delivery of public goods that be publicly funded
- Developing specific registration and accreditation of organic advisory expertise for advisors working in organic farming
- Including within FAS or similar services simple conversion checks<sup>53</sup> to provide basic information on what is involved with organic conversion, including technical aspects, market opportunities, control procedures and support available).
- Supporting the inclusion of detailed advice and training as part of lump sum transition funding for farmers converting to organic production (CAP 2028-2034 Art. 10)
- **Establishing mandatory mapping and publicly accessible databases** of accredited advisors qualified in organic farming and conversion in all Member States, with the support of the EU CAP Network, and building on and complementing existing mapping in projects like Organic Advice Network, i2connect and Modern-AKIS
- Acknowledging the important role that **organic farming associations** play in providing information and advice about organic farming, often outside established AKIS frameworks, and facilitating their integration in AKIS including access to funding support.
- Carry out a representative European survey of farmers to establish how important identified factors for specific groups (interested in-conversion, in conversion, or part-organic) at present (EU Organic Action Plan).
- Ensuring that advisory support services for organic farming are established in countries and regions where it so far is very limited.

**Encourage EU Member States to improve training opportunities in organic farming, for farmers, advisors, and other professionals, as well as education for students, using opportunities in Erasmus+ and the EU Pact for Skills, as well as national funding by:**

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<sup>53</sup> <https://organic-farmknowledge.org/tool/54947>

- Identifying organic farming and food value chain actors as a priority for the application of these funds in agricultural and food sector contexts
- Making conversion short-courses mandatory for all farmers starting conversion and applying for support payments, supported with national funding (e.g., vouchers) or future CAP (Art. 10) transition funding
- Supporting national, multinational and online<sup>54</sup> continual professional development (CPD) for all relevant actors, covering both production (technical, business and environmental) and food system (processing, marketing, catering and trade) topics, with financial support to cover time and other costs where the topics (e.g., environmental public goods) are less likely to generate a commercial return.
- Developing European curricula for education in organic farming at secondary, further, and higher education levels, for professionals and the general public utilising AKIS and Erasmus+ funding

**Encourage EU Member States to support peer-to-peer knowledge exchange and co-creation platforms, hubs, and networks, at regional, national, and international levels by:**

- Systematically supporting initiatives to enable farmers, advisers, trainers and researchers to interact and learn from each other in CAP interventions (including EIP Agri operational groups and activities, EU CAP Network groups, CMO producer organisations, conferences, cross-border visits<sup>55</sup>, field schools, and participatory living lab initiatives (see also Chapter 7 on Research)
- Establishing dedicated organic innovation and competency centres, linking research, advisors, vocational schools, and universities, as part of AKIS and national organic action plans going beyond project-based funding (see Chapters 10 on Capacity Building and 11 on Organic Action Plans)
- Further developing inspirational demonstration farms, peer-to-peer and mentoring formats as recognised AKIS instruments (e.g., field days, one-stop shops for conversion, communities of practice, peer mentoring of new converters and new advisers), complementing traditional one-to-one advice and group activities

**Invest in European organic knowledge hubs and knowledge exchange initiatives in the context of the European Organic Action Plan, by:**

- Securing continuous funding for the European Organic Farm Knowledge Platform (<https://organic-farmknowledge.org>), directly linking to EU-FarmBook, to systematically host organic materials and tools for farmers, advisers and trainers, and to ensure multilingual access
- Securing the future funding of Organic E-Prints (<https://orgprints.org>) which has acted for more than 20 years as a repository for relevant organic and agroecology research and information resources
- Working with Member States and EU-funded research, innovation, and thematic network<sup>56</sup> projects (e.g., Horizon Europe, EIP Agri) to ensure that research results are prepared in suitable formats (reports, practice abstracts, papers, datasets) and languages for key audiences (see also Chapter 7 on Research)
- Develop AI tools to support organic advisors and knowledge exchange
- Improving access to and awareness of these resources through promotion for key audiences including farmers, advisers, trainers, educators and researchers
- Continue to support awards for successful and innovative practitioners and others involved on organic knowledge exchange initiatives

<sup>54</sup> e.g., MOOCs such as the Basic Course of the OrganicAdviceNetwork (<https://organicadvicenetwork.space/>)

<sup>55</sup> e.g. cross-visits in OrganicAdviceNetwork project (<https://organicadvicenetwork.space/>)

<sup>56</sup> [https://eu-cap-network.ec.europa.eu/thematic-networks-list\\_en](https://eu-cap-network.ec.europa.eu/thematic-networks-list_en) (accessed 10.12.2025)

## 7 Research and innovation

For the organic sector, research is considered highly important to enable the further development of organic systems and practices, improving technical, environmental, financial and social performance. Research and innovation (R&I) in organic and agroecological food systems are also strategic levers for Europe's resilience and competitiveness. By reducing dependence on external inputs, strengthening local value chains and regenerating natural capital, organic R&I helps keep farms profitable and rural regions vibrant. Solutions created can and are being taken up by the whole of agriculture, for example in soil fertility management and weed, pest- and disease control (Niggli et al. 2008; Gernert et al. 2025).

Knowledge co-creation involving farmers and other food system stakeholders has a long tradition in organic food and farming, with different actors contributing through research on farms and in research stations. Innovation is the outcome of knowledge systems and stakeholder interaction, rather than new technologies, and knowledge exchange supports the uptake of innovative practices (Padel et al. 2017).

There are a range of private and public institutions involved in carrying out organic research, funded mainly through research project grants from different sources, for example:

- European research and innovation projects (Horizon Europe and previous Framework Programmes, CORE Organic Eranet, Agroecology Partnership),
- National programmes in several Members States and
- Operational groups as part of EIP AGRI/EU CAP Network.

Farmers are important contributors to applied research, and many projects work closely with organic farmers. Knowledge creation and innovation alongside advice, training and education is part of the European Agricultural Knowledge and Innovation system AKIS (EU SCAR-AKIS 2019).

The European Technology Platform **TP Organics**<sup>57</sup>, for Research and Innovation into Organics and Agroecology, was established in 2008 and is hosted by IFOAM Organics Europe. Since 2013, it is a recognised European Technology Platforms that develops R&I agendas and roadmaps for research action at EU and national level. With 150 member organisations it is advocating for more research funding benefiting organic and agroecological approaches and promotes research participation and knowledge exchange between the organic actors. TP Organics published its first Strategic Research & Innovation Agenda (SRIA) for organic food and farming in 2009, followed by two more SRIAs in 2014 and 2019. A new strategic research agenda is has been developed as part of the OrganicTargets4EU project in 2025 (see below and (Gernert et al. 2025).

National funders of organic research collaborated to support European research consortia through the ERANET mechanism. **CORE Organic**<sup>58</sup> is a European network of ministries and research councils supporting research related to organic. The network has existed in the form of four previous network programmes under the ERA-NET scheme of the EU since 2004, and has launched 8 transnational research calls, totalling EUR 61.9 million. ERA-NET funding for CORE Organic ended in 2023. The continuation of the work of CORE Organic was a focus of WP6 in the OrganicTargets4EU project.

Since 2024, the **Agroecology Partnership**<sup>59</sup> fills a similar role to CORE Organic, encouraging transnational collaboration and co-financing of research, but its remit is broader and organic is not a specific core focus of the partnership.

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<sup>57</sup> <https://tporganics.eu/about-us/> (accessed 18 December 2025)

<sup>58</sup> [https://www.coreorganic.org/pages/partner\\_search.html](https://www.coreorganic.org/pages/partner_search.html) (accessed 18 December 2025)

<sup>59</sup> <https://www.agroecologypartnership.eu/> (accessed 18 December 2025)

## 7.1 Project results and policy context

### 7.1.1 Project results

In the **synthesis of key drivers** from WP1, Reinecke et al (2024) consider a well-functioning agricultural knowledge and innovation systems (AKIS), that fully integrates organic farming, to be an important component of further organic sector development (see also AKIS Section above).

The analysis in WP1 of **national organic action plans** (Lampkin et al. 2024) showed that nearly all of them include sections on research. Some countries have dedicated research funds; national priority setting and emphasise knowledge exchange, while others are more reliant on engagement with European research initiatives. Common topics mentioned in 16 national organic action plans are: organic market (11), technology of production and processing (9), climate change (7), biodiversity (7), soil health/carbon sequestration (6), breeding (5), animal welfare (4) and circular agriculture (3) (Trkulja, et al. 2025).

The OrganicTargets4EU project provided an umbrella to continue activities of the **CORE Organic Network** as the CORE Organic Pleiades Network in WP6. The change of funding instruments from ERA-Nets in the previous FPs to the new Horizon Europe Partnerships (such as the Agroecology and FutureFoodS) has created some uncertainty about the future funding for specific organic farming R&I (Trkulja, et al. 2025). These new Horizon Europe Partnerships are relevant for organic farming research, but their emphasis on broad themes of transition to sustainable agriculture (primarily agroecology) is arguably diverting attention and funding away from specific organic R&I needs (both at EU and national level). The change in funding instruments has also required thematic realignment at national level, with national topic priorities not necessarily aligning well with overall European Partnership R&I topics.

The **Strategic Research & Innovation Agenda (SRIA)** for organic food and farming (Gernert et al. 2025) was developed with support of the OrganicTargets4EU project as part of WP5. It recognises R&I as crucial for the development of the organic sector as well for the design of more sustainable food systems. TP Organics argues that the 10<sup>th</sup> framework for European R&I needs an appropriate budget in the MFF to respond to the expectations set in research, also in relation to societal challenges in the agrifood sector. Organic and agroecological research, adopting a broad model of innovation that goes beyond technical fixes and recognises the importance also of know-how and organisational capacity for innovation should be a high priority in the future EU funded research. The SRIA was developed over two years in extensive bottom-up consultation involving farmers, researchers and other stakeholders in national workshops in the focus countries of the project and international events.

The new SRIA defines the R&I needs of the organic and agroecological sector, while also outlining R&I needs for the transition of the European food and farming system at large. It proposes 31 priority R&I topics under three themes that make up the vision of TP Organics: (1) leading for the environment, biodiversity and climate, (2) leading for people, communities and sustainable livelihoods and (3) leading for responsible innovation. These topics are intended to accelerate a competitive transition of the EU's food systems jointly in different areas. In doing so, organic R&I helps deliver the EU's Vision for Agriculture and Food, working towards a resilient, competitive, climate neutral and nature positive agriculture and food system—anchored in thriving rural communities and restored ecosystems (Gernert et al. 2025). The final section in the SRIA provides key recommendations for policymakers working on Horizon Europe and the design of FP10 calls as well as innovative and inclusive governance mechanisms to boost the impact of R&I:

- Treat **organic and agroecological R&I as priorities** in the European Competitiveness Fund (ECF) and Horizon Europe: 30% of the budget dedicated to agri-food under Policy Window “Health, bioeconomy, agriculture and biotechnology” in the ECF and Horizon Europe should be ring-fenced to organic R&I needs

- Reinforce the **multi-actor approach** in Horizon calls FP10 to ensure public funding delivers actionable outcomes for end-users and to bridge the gap between conception and market deployment in the sphere of R&I.
- Mainstream **Financial Support to Third Parties** in relevant FP10 topics to widen participation, in particular of farmers and advisers, reduce administrative friction for newcomers, and accelerate context-specific experimentation.
- Make **two-stage procedures** the default in FP10 for most agri-food topics, especially those targeting newcomers and practice-oriented innovation, and use **lump-sum funding** designed for inclusiveness as a powerful simplification tool.
- Move towards **smaller, modular consortia** that iterate faster and integrate existing living labs and lighthouse farms as real-world testbeds.
- Promote **open science, data rights, and integrity**, including meaningful participation of civil society and practitioners in governance.

### 7.1.2 Other related research

In parallel to OrganicTargets4EU, the CORE Organic Network has benefited from complementary analytical work carried out by ICROFS jointly with the FOODPathS Co-ordination and Support Action (CSA). ICROFS as the CORE Organic Network Programme Secretariat has evaluated organic R&I opportunities in the relevant Horizon Europe (HEU) partnerships (Agroecology, FutureFoodS) and the Green ERA Hub CSA since early 2024. The aim was to explore whether the 30% funding target of research *specific*<sup>60</sup> or *relevant*<sup>61</sup> for organic was reached. These partnerships were chosen for their intended relevance to organic, and because they have been specifically mentioned in the Evaluation report for the EU Organic Action Plan (2021). The study was based on publicly available information on the partnership webpages and other sources, where available, and it covered information on 'organic' in the vision, mission and SRIA of the partnerships as well as information on expert selection, evaluation criteria and selection procedures plus information about projects funded by them. Using only published sources it was not possible to assess whether the partnerships contributed to reaching the 30% target for funding in Cluster 6 (Area 3), because of a lack of criteria and more specific information on the partners involved. This confirms the risk that research for development of organic food and farming may be overlooked in the overarching broad themes of the partnerships/ missions/ other relevant funding instruments (Melby Jespersen and Trkulja 2026).

### 7.1.3 Development needs, challenges, and policy gaps

The following development needs, challenges policy gaps were identified for discussion in the national workshops (see below):

- With the emphasis on broad themes of sustainable agriculture, the Agroecology Partnership of Horizon Europe and other agricultural research agendas, attention and funding are diverted away from specific organic R&I needs (both at EU and national level). Work carried out as part of the Agroecology Partnership may well be also relevant for organic farming but it does not ensure that the specific research needs of the organic sector are covered.
- Funding in most countries is not proportional to scale of organic sector. There is need for clarity about what funding has really addressed organic sector needs, both at national and European level and in specific programmes, and for putting the organic sectors needs higher up the agenda.

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<sup>60</sup> Projects specific for the organic sector are fully aligned with the aims and principles of organic food and farming in the EU Organic regulation (EC 2018/848). 'Organic' should be mentioned in the project summary and most partners should have expertise in organic food, farming or aquaculture.

<sup>61</sup> Projects relevant for the organic sector address a major challenge identified for organic (e.g., in the SRIA) and are aligned with the organic aims and principles in the EU Organic regulation and have at least one partner with organic expertise.

- The formal shift in funding instruments from ERA-Nets (such as Core Organic) to the larger Partnership requires also thematic realignment from organic to broader topics at national level. National topic priorities might not match those of the EU level partnerships.
- About 170 projects in EIP AGRI have addressed topics that mention organic farming, but the results are not widely shared. There is a lack of coordination between basic and applied research projects with stakeholder participation (e.g., EIP-AGRI operational groups, Living Labs, Farmer-led research/innovation)
- Related is the need to develop capacity for sharing results (e.g., knowledge platforms, tools, as well as exchange opportunities in person) and including preparation and sharing of good quality practice-oriented materials from all organic research activities
- There is also need for capacity building in relation to idea generation and career development in organic farming research, which goes beyond project funding and includes the role of dedicated organic research capacity (centres and long-term projects).

#### 7.1.4 Specific policy context for research and innovation

In the EU, agricultural R&I is funded as part of Cluster 6 (Food, Bioeconomy, Natural Resources, Agriculture and Environment) in **Horizon Europe**, with multi-annual work programmes, the most recent in 2025. In July 2025, the European Commission also published its proposal for the next stage of Horizon Europe (FP10 from 2028 to 2034), foreseen as part of the **European Competitiveness Fund** (ECF) in the **Multiannual Financial Framework** (MFF). Also, the **Common Agriculture Policy** contributes to innovation in the agricultural sector through EIP AGRI (part of the EU CAP Network) and AKIS. The proposal provides some understanding of the future of research and innovation (R&I) in Europe (EC 2025).

TP Organics is concerned that for agriculture and food, a focus only on technological approaches might hurt the competitiveness and resilience of the EU. It urges the European Parliament and Council to take a more comprehensive approach to R&I and to build a prosperous bioeconomy sector around a resilient and sustainable agri-food sector (TP Organics 2025). This tech focus problem is illustrated also by the **EIC Accelerator**<sup>62</sup>, an innovation-led funding programme under Horizon Europe that offers support to start-ups and SMEs that have an innovative, game changing product, service or business model that could create new markets or disrupt existing ones in Europe or globally. For 2026, a potentially relevant theme is Biotechnology for the Regeneration of Agricultural Soils, with €50 million. However, the emphasis on ‘hard’ deep-tech solutions misses the opportunity focus on ‘soft’ ecological innovation that would be more consistent with the organic approach.

The EU Commissioner specifically highlights in the **Vision for Agriculture and Food** the need that “new knowledge and innovations must reach farmers and other food system actors more quickly and at wider scale, with concrete on-farm and on-site applicability of innovative solutions. He particularly draws attention to the example of HE Soils Mission supporting farmers in their transition to sustainable soil practices” (EU Commission 2025a)

Under **Horizon 2020**, from 2014 to 2020 around €45 million EU funds for research and innovation were used for topics related to organic farming. Future funding may fall due to changing priorities (e.g., defence) and competing themes (e.g., agroecology) (ECA 2024). In the EU Organic Action Plan (EC 2021), the EU Commission states as part of Axis 3 its intention to increase the share of organic research and innovation (R&I) and dedicate at least 30% of the budget for research and innovation actions in the field of agriculture, forestry and rural areas to topics specific to or relevant for the organic sector. This spending for organic and agroecology under the current Horizon EU Framework programme is being

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<sup>62</sup> [https://eic.ec.europa.eu/eic-funding-opportunities/eic-accelerator/\\_en](https://eic.ec.europa.eu/eic-funding-opportunities/eic-accelerator/_en) (accessed 18 December 2025)

evaluated DG AGRI against the 30% target of the EU Organic Action Plan of 2021 with publication expected in the near future.

Nearly all national organic action plans include sections on research (Lampkin et al. 2024). Some countries have dedicated organic research funds; national priority setting and emphasise knowledge exchange.

From the above, we have identified several policy funding opportunities to strengthening the research and innovation programmes for organic farming:

- European funding through the instruments of Horizon Europe and FP10 as part of the European Competitiveness Fund
- Transnational funding through the food, bioeconomy, natural resources, agriculture, aquaculture and environment Partnerships (e.g., Agroecology, AnimalHealthWelfare, FutureFoodS, Agriculture of Data)
- EU/national funding for innovation in the context of AKIS in CAP including EIP AGRI and knowledge exchange interventions
- National research programmes and research institutions
- Support actions in a future EU Organic Action Plan
- Use of EU CAP Network and Erasmus as alternatives for supporting research co-ordination between MS, including CORE Organic and TP Organics.

## 7.2 National perspectives

As part of the national policy workshops undertaken in WP7, for each theme participants were presented with some key findings from the project results, with associated development needs and policy challenges and options identified, as well as national perspectives prepared by the workshop organisers drawing on local knowledge and documentation including national support programmes and organic action plans. Development needs identified in earlier national workshops in the project could also be integrated. In this section, we summarise the key outcomes for each topic from the national workshops, based on the documentation provided by the workshop organisers.

### 7.2.1 Austria

The current state of research and innovation for organic was described as a small and manageable research landscape, characterised by strong networking but also competition for funding. It was noted that there is a lack of coordination between research stakeholders in terms of content, that advisory and educational institutions are hardly involved and that research deficits continue to exist in several areas. The main institutions involved are the University of Natural Resources and Life Sciences in Vienna (BOKU), FiBL-Austria, Austrian Agency for Health and Food Safety (AGES) and several departments of federal research, such as the Higher Federal Teaching and Research Institute for Agriculture (HBLFA) in Gumpenstein.

The Austrian participants saw the descriptions of the status-quo corresponding well to the national situation. In the further discussion the following points were raised:

- Competition between different institutes researching organic farming was confirmed.
- Funds budgeted for organic farming work should be used for such topics. The mixing of terms such as regenerative in the call descriptions can mean that the focus on organic suffers.
- The importance of the link between research and farms was emphasised, calling on the researchers to engage more actively with farmers. The networking of actors from practice, research, advice and teachers was considered very important.

The participants referred to the example of a cluster of grassland farmers, where consultants working in this field regularly attend presentations of the HBLFA and there is good exchange. Whether or not examples work well is highly dependent on the people involved (and presumably their soft- and technical skills).

The following suggestions for policy recommendations were made (in order of priority):

- Support networking and exchange between advisors, farmers, researchers, teachers
- Establish coordinated research network
- Prioritise research questions that emerge from farms

## 7.2.2 Denmark

Denmark has its own national research programme of organic farming, 'Organic Research, Development, and Demonstration Programme' (Organic RDD) that is targeting organic food systems. It is coordinated by ICROFS in collaboration with GUDP (Green Development and Demonstration Programme)<sup>63</sup>. The Danish universities are key players in research on organic food and farming, with Aarhus University being by far the largest, followed by the University of Copenhagen, DTU and Roskilde University. Occasionally also Aalborg University and SDU contribute. The research structure in support of the organic sector is often practice-oriented, characterised by a good flow of knowledge and collaboration among AKIS actors in applied research projects. One important hub for knowledge creation and innovation in organic farming in Denmark is the Innovation Centre for Organic Farming (ICOEL). The international Centre for Research in Organic Food Systems (ICROFS) at Aarhus University, seeks to improve the knowledge exchange between research and practice. Freely accessible research and information on, e.g., AKIS actors' websites are important e-knowledge sources for the organic sector in Denmark.

The Danish workshop considered specifically the question of R&I supporting organics under the Horizon Europe Partnerships. This was seen to be difficult, reflecting the policy context in Europe that is not supportive of organic R&I at present (e.g., the Swiss government stopping its support for European research efforts and withdrawing from the HEU Partnerships; Sweden and France abandoning their organic targets).

It appears that research related to 'regenerative' or 'agroecological' farming methods is considered equally valid in contributing towards the needed sustainability transition. In the Danish context consumers and the community interested in plant-rich food is closest to the organic visions at present. In the Partnership AGROECOLOGY, research projects dedicated to organics are blended with agroecology research. The Horizon Europe Partnership FutureFoodS is also open towards R&I on organic food and farming (e.g., SRIA revision currently on-going and need to integrate references towards organics).

The following action points were suggested:

- An expert group should be established, identifying which problems must be solved to initiate growth of the organic sector. It should be investigated, to what degree organic farming contributes to regenerating the losses in the resources that intensive farming has created, such as the loss of organic matter in the soil, loss of biodiversity, loss of integration of nature in cultivation.
- To ensure more support for R&I in organics there is a need for real political governmental pressure beyond the capacity of funding agencies in the HEU Partnership call boards.
- A dedicated Horizon Europe Partnership on organics should be considered.

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<sup>63</sup> <https://icrofs.dk/en/translate-to-english-soeg-forskningsmidler/translate-to-english-organic-rdd-forskningsmidler> (accessed 18/12/2025).

### 7.2.3 France

The research culture in France is participatory, demand- and practice-oriented. There is a long-standing history of active NGOs and a civil society with a well-established “bottom-up” dynamic, which is politically supported through diverse programmes and networks, but there is room for further development of a nationwide coordination structure. The public research institute INRAE is considered as an important knowledge hub together with the private research institute ITAB, a cross sectoral technical institute dedicated to knowledge development. Several networks facilitate knowledge exchange between researchers, advisors and applied research programmes.

Participants suggested that collaboration between research and other institutes is already quite well developed in France, but more could be done in relation to dissemination. However, not all actors have equally strong links with INRAE, where most research takes place. Technical institutes are more involved demonstrating the effectiveness of research methods but also take part in their development. There is a lack of interest in response to calls for projects on organic research and ways to attract new researchers to study organic topics need to be found.

The following suggestions were made with high priority:

- Farmers should be recognised as “experimenters,” and methods for remuneration, promotion and derisking experimentation should be explored
- Gathering and translating the needs of stakeholders in terms of organic R&D research (identification of the specific needs, characteristics and challenges of organic farming)
- Earmarking resources to overcome recurring agronomic challenges in organic farming. Research into multiple performances (including economics, multiple capitals) and by integrating emerging issues (e.g., pests, climate, organic/conventional ratio on a regional scale)
- A budget for research & innovation on storage and processing, distribution and catering (to the end) of organic materials and products
- Encourage collaboration between research institutes, universities and the organic R&D community in various ways/formats: RMT, CS-AB, DINABIO conferences. The challenge is to capitalise on the results of these collaborations and create links between AB research programmes
- Encourage researchers to respond to calls for projects specific to organic farming (recruitment)

Suggestions with lower priority

- Development of “integrative” / interdisciplinary research (ecology, social sciences)
- Human and financial resources to be strengthened with the implementation of long-term strategies for research and innovation in the field of organic farming.
- Support the development of R&D work on innovation on the processing side (additives, processing, etc.)
- What roles do new technologies/GMOs play in organic farming? Do not systematically sweep these issues under the carpet
- Research and R&D projects in agriculture conditional on the integration of organic farming (not in decoration but justified and with links to organic farming). Differentiate between research for and on organic farming. Generic research could also be of interest to organic farming
- Feedback from experience and experimentation; methods of dissemination/use
- Support multi-regional (important at regional level) and transnational collaboration platforms between researchers and stakeholders in organic farming

## 7.2.4 Germany

Germany has its own dedicated federal research fund for organic farming, focusing on applied research with emphasis also on knowledge exchange and dissemination. The Organic Strategy 2030 aims to expand research, knowledge transfer, data availability and infrastructure for the organic farming and food industry to transform the agricultural and food system.

With this programme Germany has taken part in CORE Organic activities since the start. Participants clearly recognised the value of the CORE-organic partnership, in particular allowing exchanges between the different research funders. Participants did acknowledge the existence of the Green ERA Hub (<https://www.greenerahub.eu/>), but deadlines and low funds contributed by each country were perceived as problematic. Participants also acknowledged the activities of Horizon Partnership Agroecology but found it too early to judge how well this supports organic farming.

The following suggestions were made:

- It is important to find a mechanism how the CORE Organic partnership can continue
- In general, large project size and high number of partners (including practice partners) were considered problematic and difficult to manage,
- Notwithstanding the importance of applied research, this cannot address all research questions and basic research should also be considered.
- The biannual organic farming science conference in German speaking countries (WiTa) is a valuable institution for knowledge exchange among researchers, and it should be strengthened also broadening to other actors.

## 7.2.5 Hungary

ÖMKi, the private Hungarian research institute for organic agriculture, and a few dedicated researchers working at different university departments or public research institute are the main actors in research. In addition to more traditional research work, ÖMKi practises co-creation and on-farm experiments, and is a recognised Living Lab. Research activities are mainly funded by local and/or international projects.

The Hungarian National Organic Action Plan foresees the publication of a national SRIA document, which is currently under development; publication is expected by the end of the year, although there is some uncertainty where topics identified will be included in any research programmes. The following points were discussed at the workshop:

- Individual research centres typically work separately and do not have a common strategy, whereas individual researchers and research groups are open to cooperation in relation to organic farming.
- Research organisations should improve collaboration in pursuit of strategic goals.
- Greater importance should be given to transdisciplinary research, and cooperation should be encouraged.
- There is a need for more research related to product development and for applied research.
- Care should be taken to ensure that research results and accumulated knowledge are not lost in research institutes undergoing liquidation or restructuring.
- How can researchers be trained to participate in EU Horizon projects?

## 7.2.6 Italy

In the Italian workshop all the knowledge and innovation related themes were discussed together. The description of the current situation emphasized the fragmented nature of the system, which is largely project-based, has high turnover and lacks a common vision. There is excellence in very specific and narrow fields and positive experience with EIP groups but also gaps in knowledge related to important aspects (e.g., market, climate aspects). Knowledge exchange between research and advisory services has improved significantly, especially through programmes like the EIP-AGRI, PIF (Integrated Supply

Chain Projects), and RDP. This was found to well-reflect the national sector situation and the identified development needs and policy gaps to cover the most salient points.

The discussion highlighted a growing number of interesting initiatives and virtual communities exchanging on practices and experimental results, thus providing useful technical information to members. This appears to be a promising model that is popular among young farmers. There are ethical concerns about use and ownership of data gathered through digitalisation and innovation processes in agriculture and smart farming technologies which needs to be addressed. It would be important not to miss the opportunities provided by the prominent role recognized to AKIS in the current CAP delivery model, but it may be already too late also to the prominence of the strong digitalisation focus

The following suggestions were made:

- Support self-organised, self-managed and monitored virtual communities and networks focusing on agroecological and organic farming practices
- Support innovation organisational models and solutions for technical assistance that not only provide technical information but also encourage the creation and nurturing of communities (through webinars, online and in presence courses, chat community, etc.)
- Connect EIP-AGRI initiatives to organizing/strengthening of organic supply chains, for instance, by introducing dedicated scoring mechanisms favouring organics
- Delivery of an integrated package of measures including research, experimentation of innovations and knowledge/technological transfer
- Dedicated organic (field) days addressing existing gaps in specific topics, e.g., organic crop protection and organic animal husbandry

### 7.2.7 Romania

Agricultural research in Romania is adapting to a more participatory and demand driven agenda, but knowledge transfer in this post-socialist country principally suffers from a fundamental lack of trust between actors and experience with structured dialogue is limited. The InterBio consortium has four active regional cluster projects providing an enabling environment for networking and cooperation, involving some university departments, and some public research institutes.

The National Organic Action Plan includes sections on research but does not cover all themes mentioned in the project, e.g., livelihoods and communities and there is no integration between basic and applied research (such as EIP AGRI, Living Labs and farmer-led research). How research should be funded is identified as a specific development need. It was noted that the national innovation strategy lacks coherence and connection with digital transformation strategy for the organic sector. Agriculture is not part of the national plan for resilience and recovery. It would be desirable to have simplified and coherent guidelines for the funding of research and innovation, and there should be an open dialogue with beneficiaries, NGOs, consulting firms, right from the negotiation stage with the EU.

No specific recommendations were made.

## 7.3 European perspectives

### 7.3.1 EU Commission interviews, Autumn 2025

Interviews were conducted in September and October 2025 with representatives from different units within the European Commission covering the different themes in this report. A draft of the research recommendations was discussed with representatives from DG Agri (Research) and the REA. There was no general disagreement with any points raised in the recommendations. The following points were made:

- There is a shift in emphasis in the Commission, focusing on sustainable growth of the organic sector, with 25% organic land area seen as an aspirational target.
- Important key words are competitiveness, biodiversity (links to human health might also offer opportunities)
- Many ideas suggested in our recommendations are already being implemented, which can be acknowledged. For example, the need to strengthen the link between Horizon Europe and Partnership research and EIP AGRI and knowledge exchange with farmers. Disseminating research and knowledge exchange might also relate to business start-ups and scale-out programmes.
- The 30% funding target stated in the EU Organic Action Plan is monitored by DG AGRI and considered to be met. A future EU Organic Action plan might be relevant to consider.
- There is uncertainty regarding budget and resources for future research which is part of the broader competitiveness fund in the MFF.
- Existing partnerships have several years to run, but it is likely that in future the number will be reduced rather than extended.

### 7.3.2 Organic Summit, Copenhagen, August 2025

The Organic Summit (Anon 2025) was held as part of the Danish Presidency of the European Union and brought together organic sector stakeholders and policymakers from many countries. Many of the themes and policy recommendations discussed during this conference, including those featured in the Conference Charter and the Session summaries, are relevant to the work in the OrganicTargets4EU project and are therefore considered in some detail here.

Improving organic farming through research and knowledge exchange is mentioned in the Conference Charter under “improve” organics. The plenary discussion on ‘Organic at its Best’ highlighted that building the organic future requires innovation and networks. From research farms in Germany to regional cooperatives in Italy, successful cases combined tradition with innovation. Networks, cooperation across the value chain, and systemic investments were highlighted as essential to keep organics from remaining niche (Anon 2025).

### 7.3.3 Final OrganicTargets4EU project conference, Brussels, November 2025

At the final conference of the OrganicTargets4EU project, an international audience of stakeholders and policymakers heard about some of the results of the project and a summarised version of the emerging policy recommendations. In a World Café exercise, participants had the opportunity to reflect on the policy recommendation and to identify specific priorities and additional considerations.

The discussion at the world café workshop noted that all the research recommendations were relevant at EU and national level. It highlighted the following points to specific recommendation headings:

Financially support organic research programmes and their co-ordination in line with 25% target:

- Consider the needs of different sectors (e.g., agroforestry, beekeeping)
- Organic is a prototype and as such deserves more than 30% funding
- Extend R&I funding to value chains and encouraging participation by mainstreaming financial support to third parties and reducing administrative burdens.
- Value chains are not isolated but are related to and dependent on each other (e.g., beekeeping and arable through flower strips and through pollination of flowering crops)
- Consider how research can contribute to creating more products, such as cosmetics, medicinal and health stimulating products

Improve capacity for sharing of R&I results with all related professionals:

- Suggestion to hold more scientific congresses for organic (IFOAM, ISOFAR)
- Have more on-field (face to face) exchanges—online is not sufficient
- Better coordination of online platforms, bringing together results from different projects. New projects should not create new platforms but cooperate with existing ones—people are lost and do not know where to find information
- Farmers lack access to knowledge
- Integrate organic in educational curricula—strengthen education
- Further developing and supporting sector specific research archives such as Organic E-prints

Funding stakeholder participation:

- Stakeholders should be compensated for knowledge and time contributed
- National funding rules often do not allow stakeholders to participate in Partnership calls because of co-financing requirements, possible conflicts with competition law, State Aid and national or EU rules that might not allow funding farmers
- How can full stakeholder funding (compensation) be assured, even if projects are co-funded?
- Including advisors can be expensive, if fully private/independent

## 7.4 Policy recommendations

The aim should be to ringfence funding and build specific capacity for organic research and innovation, proportional to the growth ambitions for the sector. This delivers solutions that are taken up in agriculture on how to improve farm profitability, reduces input dependency, and regenerate natural capital, and is strategic investment in Europe's competitive and resilient agri-food systems.

Policymakers can influence research programming at European and national level and through and improved coordination within the European Research Area.

Member States are encouraged to apply all relevant recommendations in this section at national/regional level, potentially as part of national organic action plans (see Chapter 10), and supported where appropriate by the EU organic action plan and the EU CAP Network for sharing best practice.

At the EU-level, including in any future EU organic action plans, we recommend that the Commission should:

### **Secure dedicated funding for organic research and innovation in all funding instruments of Horizon Europe, by:**

- Allocating a minimum of 30% of agri-food R&I funding in Horizon Europe and the European Competitiveness Fund to projects specific to or highly relevant for organic farming and aquaculture, consistent with the objectives of the future EU Organic Action Plan, organic sector priorities (e.g., TP Organics SRIA) and the potential for contributions to wider agricultural sustainability (climate change, biodiversity, water and soil conservation)
- Include organic R&I as an explicit objective of policy window 1 (Clean Transition & Industrial Decarbonisation) and policy window 2 (Health, Biotech, Agriculture and Bioeconomy) in Horizon Europe and the European Competitiveness Fund
- Clarifying the commonalities and differences in practices, principles and regulation of organic farming, aquaculture and food, and related concepts such as agroecology and regenerative farming, to ensure that research is appropriately addressing the sector specific needs

- Ensuring transparent monitoring and reporting on how EU and national R&I funding addresses organic sector needs and policy targets.
- Aligning EU research partnerships (e.g., Agroecology, FutureFoodS, Animal Health and Welfare, and Agriculture of Data), missions (e.g., Soils), and national programmes to explicitly include organic research objectives and funding.
- Ensure good integration between basic and applied R&D projects and activities with stakeholder participation (e.g., EIP-AGRI operational groups, Living Labs, Farmer-led research/innovation, advisors as facilitators of interaction).

**Broaden participation in R&I activities through simplification of the funding rules in Horizon Europe and CAP programmes, by:**

- Designing R&I calls that actively involve farmers, advisors, SMEs, NGOs, and value-chain actors through reinforced trans-disciplinary, participatory and multi-actor approaches.
- Making two-stage procedures and simplified funding instruments standard for practice-oriented innovation.
- Expanding the use of the Financial Support to Third Parties mechanism to enable stakeholder engagement as innovators and experimenters, including recompense for time and resources, and to reduce administrative barriers and enable experimentation in diverse regional contexts.
- Promoting open science while safeguarding stakeholder data rights and ensuring meaningful participation of civil society and practitioners in project governance.

**Strengthen Europe's leading role in research on organic farming through support for transnational networking of funders and other actors, by:**

- Securing long-term support for a European network of national organic research funding bodies, building on the experience of CORE Organic.
- Using this network to align EU and national priorities, coordinate calls, and maintain strategic capacity in organic R&I.
- Anchoring the network within the future EU Organic Action Plan to ensure continuity and policy coherence.

**Encourage Member States to invest in specific organic research and innovation, by:**

- Allocating funding for specific organic farming projects and programmes in line with national/regional organic action plan priorities, including national contributions to joint European calls
- Developing dedicated research and innovation capacities beyond time-limited project funding to allow career development for researchers and encourage new researchers to engage with the sector (e.g., Centres of Excellence, see also Chapter 10 on Capacity building)
- Recognising farmers as "experimenters" in research and explore ways to remunerate their time, and the risk taken with experimentation
- Engaging with stakeholders and national, European-level platforms to identify research priorities and encourage transdisciplinary research and cooperation wherever possible.
- Complementing R&I for primary production with R&I for value chains (incl. storage, processing, distribution, and catering), markets and consumers and questions of governance
- Monitoring how research funding is addressing organic needs at national/regional level and whether funding levels are adequate to achieve the set targets for the organic sector

**Invest in capacity for sharing and scaling out research results, and encourage Member States to do the same, by:**



- Providing stable funding for European and national knowledge platforms and research archives relevant to organic farming (e.g., <https://orgprints.org>; <https://organic-farmknowledge.org/>)
- Facilitating easy access to data collected at EU level (e.g., Farm Sustainability Data Network, Eurostat), especially for socio-economic and environmental impact research (see also Chapter 9 - Statistics and market data)
- Supporting the development of good quality, practice-oriented, multilingual materials, tools, and other resources from all publicly funded organic R&I.
- Facilitating exchange through regional, national and trans-national networks, conferences, field visits and training opportunities (e.g., ERASMUS+ exchanges), particularly for early-career researchers and practitioners.
- Strengthening links between research, advisory services, and innovation support within AKIS (see also Chapter 6).
- Support projects for scaling-out successful innovation and business models in the organic food supply chains, including advisors.

## 8 Statistics and market data

Good quality data and statistics are taken for granted in agriculture in general but are lacking for organic food and farming in many contexts. They are needed for decision-making on production, investments and marketing, by businesses at all levels of the supply chain, from farmers to retailers. They are also needed by policymakers for the implementation of policy measures, and the monitoring and evaluation of their outcomes. Data and statistics are also a key resource for researchers modelling organic production and food systems, as well as the impacts of policy options.

### 8.1 Project results and policy contexts

#### 8.1.1 Project results

Statistical data were used extensively within the OrganicTargets4EU project, including data on policy support and area growth in a review of drivers and lock-ins (Reinecke et al. 2024) and in scenario development (Zanoli et al. 2026). Detailed regional land use and livestock number data as well as FADN financial data were used for the modelling work (Curtiss et al. 2025; Schiavo 2025a, b). They are also an important resource for advising farmers on technical, financial and market aspects (Padel et al. 2025), for research (Trkulja et al. 2025) and for policymaking (Lampkin et al. 2021). As such statistics and market data have been a critical resource for the project, and the reflections here have been derived primarily from their use.

The availability of data on organic farming has improved over recent decades and now includes:

- Certification data from control bodies, which up until 2020 formed the basis for much of the statistical data on organic areas. Following the integration of organic data collection in the SAIO Regulation (EU 2022/2379), some of this data relating to small farms, livestock, and individual crops in conversion has been lost (see Figure 8.1). This data is normally published by Eurostat<sup>64</sup> and also by FiBL Statistics.<sup>65</sup>
- Farm Structure Survey (FSS) and Integrated Farm Survey (IFS) data on organic land areas and individual crop and livestock numbers, although whole population data is normally only available at 10-year intervals, e.g., 2020, when full censuses are conducted. Very small farms may be excluded from statistical surveys.
- Integrated Administrative and Control System (IACS) and Land Parcel Identification System (LPIS) data on organic land areas, individual crops and, from animal movement and health data, livestock numbers, although certified land which does not receive policy support or organic payments may not be identified.
- The Farm Accountancy Data Network (FADN), now the Farm Sustainability Data Network (FSDN), also has organic farms separately identified. FSDN mainly provides financial data, but physical data relating to inputs and outputs is increasingly available, and now some sustainability indicators are also included. Some data is summarised online, on the EU Organic Farms Dashboard, covering Arable, Dairy and Beef systems.<sup>66</sup> FADN in many countries has small organic samples, or missing data for specific farm types, and the data are not necessarily representative of organic farming as such, because the sample is not selected for this purpose. Options to improve on this are currently in preparation.

<sup>64</sup> Eurostat Database Agriculture/Organic (org): <https://ec.europa.eu/eurostat/web/agriculture/database> (accessed 05.02.26)

<sup>65</sup> FiBL Statistics: <https://statistics.fibl.org/index.html> (accessed 05.02.26)

<sup>66</sup> <https://agridata.ec.europa.eu/extensions/OrganicFarmsReport/OrganicFarmsReport.html> (accessed 05.02.26, data to 2023 available)

- Yields and output data can be derived from FADN (see above), and Eurostat publishes total organic output estimates based on national reporting. However, the quality of these data are questionable, given the issues relating to the organic samples in FADN and the lack of sound national level data. Yields will be affected by a range of factors—location (climate, soil-type), farm type, position in the rotation etc. In some cases, organic yields are being collected as part of national monitoring systems but are not necessarily separately identified or analysed.
- Organic price data is normally only available in a few national cases, for example AMI in Germany<sup>67</sup> or AgenceBio<sup>68</sup> in France. Since 2021, the European Commission has been collating and publishing some organic price data for crops, dairy and beef from FSDN.<sup>69</sup> But the data is not consistent across crop and livestock categories based and there are methodological issues when publishing comparative results.
- Market data is in general much more difficult to access at a European level. Various countries report estimates of the retail sales value of the organic market (in some cases also volumes, catering and exports). These are often produced by commercial providers such as GfK or Nielsen and may only be available on a subscription basis. The available public data is collated by FiBL Statistics for the annual World of Organic Agriculture reports (Willer et al. 2025 and other years)<sup>70</sup> and is also included in the OrganicTargets4EU national organic sector factsheets.<sup>71</sup> National data may be collated by agencies such as AMI in Germany or AgenceBio.
- Some trade data is available via the Traces system in the EU. This is obtained by recording organic certification details accompanying shipments to the EU, but only identifies the point of entry, and further information about destination countries are not available. Key results are available in the form of EU Commission Analytical Briefs.<sup>72</sup> Some countries operate similar systems, so that it can sometimes be possible also to estimate values for EU exports. With exceptions (e.g., Denmark), intra-EU trade is not quantified.

Much of the official data (FSS, IFS, FADN, IACS, LPIS) is possible to obtain due to the inclusion of specific identifiers for organic land, crops, animals or farms, based on the legal definitions under the EU organic regulations. But opportunities to make further use of this, for example in harvest yield estimates or in the Harmonised Classification for trade data, have not yet been realised.

Lack of access to financial and market data was reported as barrier to organic conversion in the focus countries (Möhring et al. 2024; Padel et al. 2025), as the risk and uncertainty perceptions were seen as problematic. The need to improve the availability of financial and market data is also mentioned in many national organic action plans (Lampkin et al., 2024), but the implementation of actions to improve the situation has not been evaluated.

### 8.1.2 Other related research

Two EU-funded projects have addressed the issue of statistical and market data on organic food and farming directly. Twenty years ago, the EISfOM project (2003-2006) analysed a range of data categories (farm production data, farm financial data, prices, consumption, supply balances and international trade), with detailed methodological considerations and illustrations of good practice from different countries presented in the second project conference (Rippin et al., 2006a).<sup>73</sup> The final report (Rippin et

<sup>67</sup> <https://www.ami-informiert.de/ueber-die-ami>

<sup>68</sup> <https://www.agencebio.org/>

<sup>69</sup> Organic Price Trends: <https://agridata.ec.europa.eu/extensions/DashboardPrice/OrganicPricesTrends.html> (accessed 05.02.26, data from 2021 to 2026 available)

<sup>70</sup> <https://www.fibl.org/en/shop-en/1797-organic-world-2025> (accessed 05.02.26)

<sup>71</sup> <https://organictargets.eu/organic-sector-factsheets/> (accessed 05.02.26)

<sup>72</sup> [Analytical briefs - Agriculture and rural development - European Commission](#) (accessed 05.02.26)

<sup>73</sup> <https://orgprints.dk/id/eprint/6054/1/rippin-et-al-2006-eisfom.pdf> (accessed 07.02.26)

al., 2006b)<sup>74</sup> set out clear recommendations for improvements including proposals for use of organic identifiers, harmonisation of data classification, the integration of organic control bodies in the data system, and the establishment of a European organic market data network to support the Commission and Eurostat in addressing the issues identified. Few, if any, of the recommendations were picked up in practice.

Ten years ago, the OrganicDataNetwork project (2012-2014)<sup>75</sup> attempted again to find ways to improve the data situation for the organic sector. The synthesis and recommendation reports (Feldmann et al. 2014; Zanoli 2014) drew together the key conclusions with respect to existing organic market data collection systems and methods used, the data needs of market actors and other end users, the issues relating to establishing a common European database, methodologies for data quality improvement, lessons learned from stakeholder improvement, and examples of improving data collection systems. They recommended:

- Extend the mandate for statistical data collection on the organic market
- Develop better statistical processes to increase accuracy of data collection on the organic market
- Harmonise the statistical processes for data collection on the organic market to increase coherence and comparability
- Establish a system of routine quality checks for organic market statistical data
- Strengthen the institutional framework for statistical data collection on the organic market
- Use measures of the Rural Development Programme to provide incentives to increase the availability and the quality of organic market data

The Organic Market data Manual and Code of Practice (OrMaCode 2014) is a collection of information and experiences gained through the OrganicDataNetwork project. The information provided can be used selectively to meet the needs of data collectors in collecting, processing, storing, analysing and disseminating organic market data. The Code of Practice consists of a list of principles and related indicators covering the different key areas of organic market data collection, processing, storage and publication/dissemination. It is consistent with the European Statistics Code of Practice. The Manual contains specific guidelines for applying the Code of Practice. It also contains guidelines on the collection of relevant sets of data and on the way to ensure that quality criteria will be met.

Since then, the Commission has responded with the establishment of an organic price survey<sup>1</sup> and a series of Market<sup>76</sup> and Analytical Briefs on production, FADN and Trade data derived from Traces<sup>77</sup>. These provide useful analyses of available data, but do not address the shortcomings of organic data availability.

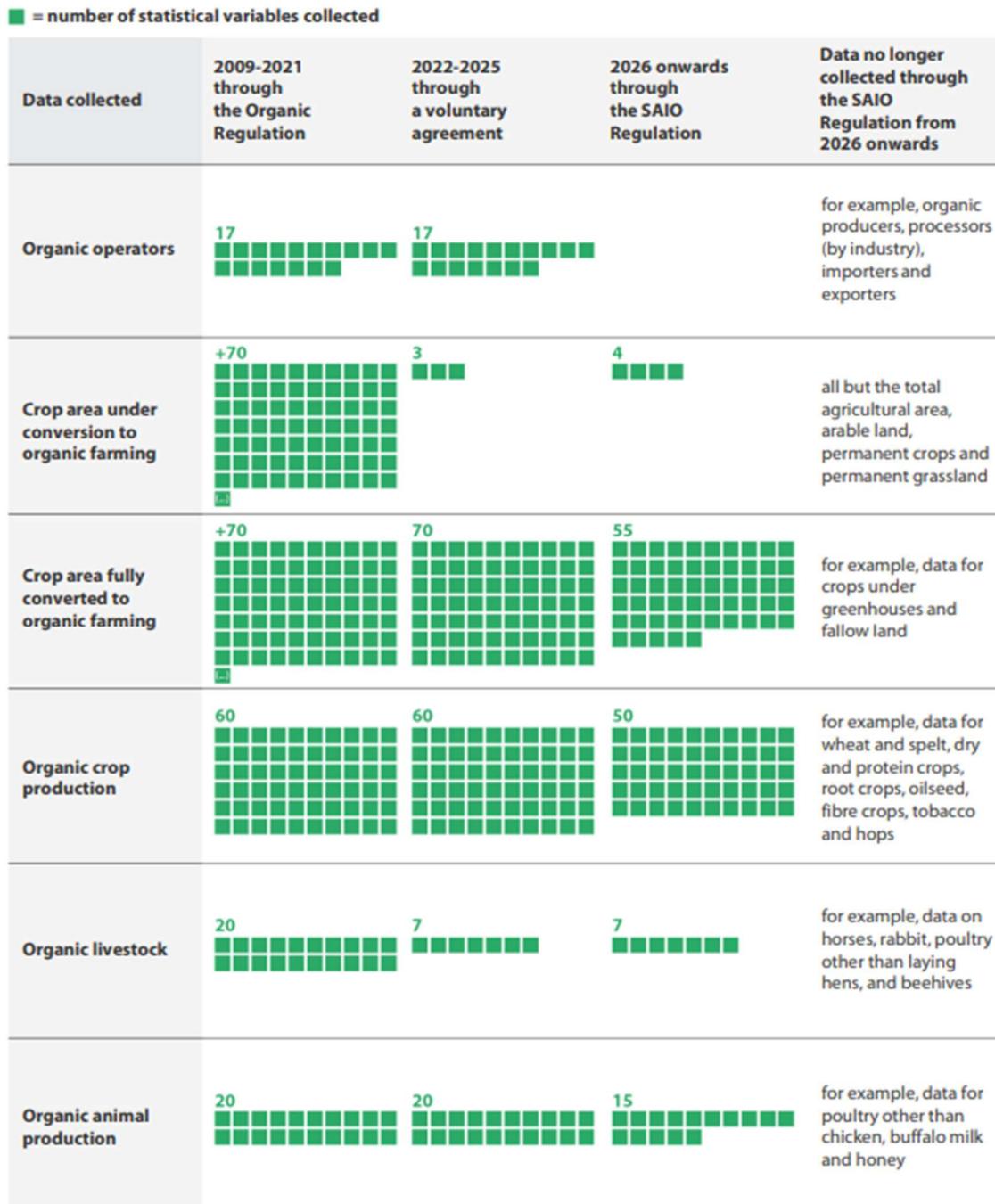
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<sup>74</sup> <https://orgprints.dk/id/eprint/8961/1/rippin-et-al-2006-eisfom-final-recommendations.pdf> (accessed 07.02.26)

<sup>75</sup> <https://www.organicdatanetwork.net> (accessed 07.02.26)

<sup>76</sup> [https://agriculture.ec.europa.eu/data-and-analysis/sustainability-and-organic-farming/agricultural-markets-organic-sector\\_en](https://agriculture.ec.europa.eu/data-and-analysis/sustainability-and-organic-farming/agricultural-markets-organic-sector_en) (accessed 09.02.26)

<sup>77</sup> [https://agriculture.ec.europa.eu/cap-my-country/performance-agricultural-policy/studies-and-reports/analytical-briefs\\_en](https://agriculture.ec.europa.eu/cap-my-country/performance-agricultural-policy/studies-and-reports/analytical-briefs_en) (accessed 09.02.26)



Source: ECA based on Eurostat questionnaires and the implementing acts of the SAIO Regulation.

**Figure 8.1 Changes in number of statistical variables collected by Eurostat from 2009 to 2026 onwards**

Source: ECA (2024)

More recently, the European Court of Auditors report on organic farming policy (ECA, 2024) highlighted the absence of data as a major problem for policy evaluation. Since the new EU Organic Regulation was implemented, transferring the data reporting obligations from Member States using certification data to the SAIO Regulation (see below), fewer statistical data on organic are being collected despite the promise that the transfer to SAIO would lead to an improvement. There is no legal obligation on Member States to collect statistical data between 2022 and 2026 pending the implementation of the SAIO Regulations, and the data covered is being reduced (Figure 9.1). Given that many of the data lost are

still being collected by the control bodies, the additional resources needed to include them are limited. There could be more scope to derive data from the organic control system, as farms and food businesses are inspected annually, including relevant data checks. Lampkin et al. (2022) investigated the possibility of using control body data as a source of evidence for environmental indicators. They found that, while land use and livestock number data (including in-conversion) were readily available, other data on, e.g., input use (fertilisers, plant protection products, feeds) and yields were not collected. The existence and accuracy of records for such data were checked by the inspectors. A unified, digitalised approach might make it possible to collect and collate additional data in a coherent format.

### 8.1.3 Development needs, challenges, and options

In order to enable farmers, food businesses, financial institutions, consumers and policymakers to make rational decisions concerning investments in the organic sector and/or purchase of organic products, there needs to be a significant improvement in organic data scope, quality and timeliness. This also includes data for modelling and research purposes, to allow forecasting and evaluation of environmental, economic and other impacts (ECA, 2024). The time-lags for historical data collection can result in decisionmakers, including policymakers, 'flying blind' without results for actions undertaken, or forecasts based on earlier years which have already been overtaken by events.

The loss of conversion data for individual crops is a particular concern, as it prevents tracking and forecasting of potential market and environmental impacts, which is a significant issue for a sector with ambitious growth targets set by policymakers. This needs to be addressed in the SAIO Implementing Regulations (see below).

Gaps in coverage, small sample sizes, and representativity issues are a particular concern, particularly with respect to price data and farm financial/environmental data. The FSDN collection of such data, potentially a very good data source, has significant weaknesses in this context. It is understood that a review is currently taking place, which might make specific recommendations for improvements. Member States could, for example, use oversampling to improve sample size and representation, with subsequent weighting adjustments to ensure that organic farms are not over-represented in samples delivered to FSDN.

Market data (value and volumes for production output, retail sales, out-of-house-consumption, imports and exports) have considerable gaps both in relation to domestic and international data. While in some countries, there are more detailed national sources due to the efforts of commercial, organic sector and government agencies, for many countries relevant data is missing completely. In many cases, organic data could be extracted from total food sector data if appropriate identifier mechanisms were to be implemented. For example, an additional digit could be included in the Harmonised System Codes for international trade.

### 8.1.4 Specific policy context for statistics and market data

The reform of the Statistics on Agricultural Inputs and Outputs (SAIO) Regulation (2022/2379)<sup>78</sup> was intended to bring about a significant improvement in organic farming data, by integrating the data collection that had previously taken place in the context of the EU Organic Regulations (2092/91 and subsequent revisions), and linking it with other data on input use relevant to the Green Deal strategies (Reg. 2022/2379 Recitals 2, 19, 20).

Of particular relevance for policymaking is the Recital No. 20:

*"Organic production is becoming increasingly important as an indicator of sustainable agricultural production systems. Statistical data on organic production are essential to monitor progress of the action*

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<sup>78</sup> <https://eur-lex.europa.eu/eli/reg/2022/2379/oj/eng> (accessed 16.02.26)

plan for organic production in the Union. It is therefore necessary to ensure that available statistics on organic production, **including data specifying certified or under conversion production areas**, are consistent with other agricultural production statistics by integrating those into the data sets. Those organic production statistics should also be coherent with, and use, the administrative data produced under Regulation (EU) 2018/848.”

Article 5.11 provided for the inclusion of a maximum of 90 additional variables relating to organic farming in the implementing regulations, but as ECA (2024) highlighted (Figure 8.1 above), simplification pressures led to the number of variables being reduced, contradicting the objectives of the primary legislation. Opportunities to make specific provisions for organic price data in the Implementing Regulation EU 2023/1579 were not utilised, while considerable attention was placed on organic farming use of plant protection products in Implementing Regulation 2023/1537, including for the in-conversion crops no longer being collected under Implementing Regulation 2023/1538. The land use data includes certified sown and harvested areas, as well as certified organic production quantities. Further Implementing Regulations cover livestock (2023/2745) and fertiliser inputs/nutrient balances (2024/2212).

Initiatives in the planning that might also be relevant include the Farm Sustainability Compass as a response to calls for more sustainability benchmarking. In this context, it will be important to have specific data on the impact of organic practices and systems<sup>79</sup> so that organic farmers are fairly assessed.

In the context of digitalisation, European Business Wallets<sup>80</sup> may also be highly relevant for the organic sector. In November 2025, the EU Commission proposed a regulation to establish the Wallets as “a harmonised digital solution to ease administrative burdens and enable companies and public sector bodies to identify, to authenticate and to exchange data in a secure and user-friendly way, with full legal effect across the European Union.” This could create opportunities for data sharing between organic farmers, certifiers and policy support administrators (IACS), and include the opportunity to generate environmental sustainability data for relevant indicators. The Wallets are also intended to facilitate communication of legal documents. Although the Wallets would not be compulsory, the creation of a unique digital identity for businesses would be an important component, that has already been highlighted as a factor enabling Statistics Denmark to generate a wider range of data on organic farming than is available elsewhere.<sup>81</sup> The Commission expects the Wallets to be accepted by public administrations across the EU by 2028, two years after the passing of the relevant regulations.

## 8.2 National perspectives

As part of the national policy workshops undertaken in WP7, participants were presented with some key findings from the project results for each theme, with associated development needs and policy challenges and options identified. National perspectives prepared by the workshop organisers drawing on local knowledge and documentation including national support programmes and organic action plans. Development needs identified in earlier national workshops in the project could also be integrated.

In this section, we summarise the key outcomes for each topic from the national workshops, based on the documentation provided by the workshop organisers. Despite their relevance for business and policy-decision makers and researchers, there was limited engagement on this issue of market data and statistics from the national workshop participants.

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<sup>79</sup> For example in the [JRC - Farming Practices Evidence library](#) (accessed 16.02.26)

<sup>80</sup> <https://digital-strategy.ec.europa.eu/en/policies/business-wallets> (accessed 16.02.26)

<sup>81</sup> See <https://orgprints.org/id/eprint/8961/> (accessed 17.02.2026)

### 8.2.1 Austria

Not discussed

### 8.2.2 Denmark

Not discussed as the availability of statistical data on organic food and farming in Denmark is better than in many other countries and therefore it was not seen as a priority.

### 8.2.3 France

As part of the discussion on supply chains, the workshop recommended investment in a more comprehensive data collection process, and in particular to increase the sample of organic farms in FSDN. Processing data should also be enhanced, to include volumes of organic products per processing site.

### 8.2.4 Germany

In Germany, the availability of organic data is relatively good. Until 2025, crop and land use data has been collated by both the agricultural ministry BMEL—now BMLEH—based on certification data, and by DeStatis based on Farm Structure Survey data. At times, there have been quite large discrepancies between the two sources, primarily due to the statistical data excluding farms under 5 ha and relying on sample data, or estimates, for years between full surveys. From 2026 under the SAIO Regulation, DeStatis will have primary responsibility for this data collection and there will be time series discontinuities due to the exclusion of smaller farms. The Thünen Institute also carries out analyses of the Farm Structure Survey data.

Financial data is available through the German FSDN ‘Testbetriebsnetz’ which is analysed by the Thünen Institute and comparative data published both by the agricultural Ministry (BMLEH) based on whole sample comparisons, and by the Thünen Institute based on matching individual organic farms with clusters of similar conventional farms (Kuhnert and Offermann 2025).<sup>82</sup>

Market data for Germany is collated and published by the Agrarmarkt Informations-Gesellschaft mbH (AMI)’s Arbeitskreis Biomarkt. The reports include estimates for prices, quantities, market retail sales values, imports and exports.

Germany already has several but rather different and fragmented structures for data gathering, often with no long-term security of funding. The workshop participants felt they did not have enough of an overview over who holds which data. The possibility of using IACS data was considered valuable. Data protection is often seen as an obstacle to exchange data even though data access is important

The current German organic action plan (Bio-Strategie 2030<sup>83</sup>) includes an action to improve data availability on organic food and farming, with particular reference to control body data, crop yields and farm financial data.

### 8.2.5 Hungary

The Hungarian workshop participants received more background information about the data situation in their country. This included the full agriculture census every 10 years, 25% sample census in year 3 and 6 in between, individual farm surveys twice yearly, and increasing use of administrative data.

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<sup>82</sup> [https://www.thuenen.de/media/ti-themenfelder/Oekologischer\\_Landbau/Die\\_Entwicklung\\_der\\_deutschen\\_Oekobranche/Einkommensentwicklung\\_im\\_OEkolandbau/2024\\_06\\_30\\_Kuhnert\\_Offermann\\_Wirtschaftlichkeit-Oekolandbau.pdf](https://www.thuenen.de/media/ti-themenfelder/Oekologischer_Landbau/Die_Entwicklung_der_deutschen_Oekobranche/Einkommensentwicklung_im_OEkolandbau/2024_06_30_Kuhnert_Offermann_Wirtschaftlichkeit-Oekolandbau.pdf) (accessed 16.02.26)

<sup>83</sup> [https://www.bmleh.de/SharedDocs/Downloads/DE/Broschueren/bio-strategie-2030.pdf?\\_\\_blob=publicationFile&v=10](https://www.bmleh.de/SharedDocs/Downloads/DE/Broschueren/bio-strategie-2030.pdf?__blob=publicationFile&v=10) (accessed 16.02.26)

Workshop participants noted that data transfer between different government agencies is very strictly regulated and, although sector actors know that several databases exist, they are not necessarily accessible. They mentioned the National Tax Authority, the National Food Chain Safety Office (NFCSO) and the State Treasury. They often not only have data, but also data that can be used to validate data held by other organisations. Nowadays, these authorities often consider data provision to be a risk and, in some cases, even refuse to provide data (and there is obviously a very serious risk if the data of citizens and businesses can be linked together by one central organisation).

Workshop participants raised the issue of data reliability and whether they were using good platforms for data collection. As the legislation governing Eurostat's work currently requires very little organic data collection, the national legislator could decide to require the Central Statistics Office to collect more data. Of course, care must be taken to avoid the creation of parallel databases (which would therefore possibly provide different data).

Although data collection on retail trade is already available in Hungary, it only covers part of the retail sector, approximately 60% of turnover according to the researcher. There is no data on the operation of producer organisations, although there are 25 to 30 of them operating in Hungary. Their operations must be planned in an operational programme and approved by the Ministry, but they are not considered to be drivers of development.

Very little data is available on organic production; everything has to be requested individually from the farmers. Certain data is collected by the central competent authority (NFCSO) but is not processed (electronic farm register).

Until the legislation on Eurostat is amended and the new SAIO Regulation comes into force, the Hungarian government could require data collection within its own competence. Under the current data collection system, there is only data on land use and livestock numbers, but no data on production and crop yields, nor access to import and export data.

### 8.2.6 Italy

Statistics and market data were considered in the Italian workshop together with supply chains and consumer demand. SINAB (National Information System on Organic Agriculture) collects and publishes data relating to organic agriculture in Italy, including operators, crop areas and livestock production data at national and regional level as well as household consumption and prices data for some products.

Market data are only partially available: imports from third countries are available but intra-EU exchanges are still missing; export data are partial and based on estimations (a current project has been financed by the MASAF to start off the collection and publication of export data).

The workshop identified the following development needs and policy challenges:

- Measurement systems for production indicators and externalities
- Establish and empower a national agency that provides data and information on the organic sector
- Establish connections and concessions between public and/or private institutions and data providers to make available market data (intra-EU exchanges are not systematically tracked)
- Lack of funds allocated to data collection
- No obligation for systematic data collection and provision mainly for market

Key policy recommendations from this workshop included:

- Produce statistics on organic farming performances in terms of multifunctionality and labour intensity of agricultural practices

- Produce statistics (not estimates) on organic out-of-home consumption, organic sales through direct marketing and in specialized shops (statistics on organic sales beyond large retail chains, which have reduced organic products references)
- Need to improve available organic market statistics to help operators to make better investment/management choices
- Need to organize services not only to meet CAP measures administrative requirements but also to meet market/supply chain needs

### 8.2.7 Romania

The moderator presented the current status, and the group evaluated this from a national perspective. Romania relies on the following sources for statistics and market data on organic agriculture: Ministry of Agriculture; FiBL Statistics; European Commission/Eurostat (sustainability and organic farming data); Statista (organic food market in Europe) and data from the retailers.

The workshop identified under development needs and challenges that more reliable data on market size and more engagement of researchers in collecting data was required. Financial support for data collection initiatives would be desirable.

## 8.3 European perspectives

### 8.3.1 EU Commission interviews, Autumn 2025

Interviews were conducted in September and October 2025 with representatives from different units within the European Commission covering the different themes in this report. For this topic, a discussion was held with representatives from DG AGRI A1 (Policy perspectives), A4 (Data governance) and separately B4 (Organic).

The limitations on timely and quality organic data was recognised as shortcoming that needs to be addressed, particularly given the scale of the sector and its market, trade and economic impacts. There are real difficulties presenting, highlighting and monitoring the reality of the organic sector in the EU due to the lack of data and the failures to distinguish between conventional and organic data. While this is often seen as a subject for experts, it is also relevant for policymakers.

It was acknowledged that there could be a role for an EU-level organic market observatory to help bring these data together, but also initiatives at national level would be helpful. There were some reservations about whether an EU-level initiative would produce new information.

From the Commission's perspective, a key driver now is to reduce the administrative burden on respondents. It would be good to identify how better use could be made if administrative sources, including data from control bodies. Quality standards need to be maintained, and data collection is not the primary function of control bodies.

The Commission is planning to introduce a data governance authority at Member State level which should examine all the data flows and needs of the CAP, including organic certification, and to identify where interoperability is lacking. The plans to introduce unique IDs and European Business Wallets (see above) would be part of this process. This could be interesting for organic farming, because of the potential to exchange information and data with business partners and public authorities, including evidence that the business fulfils certain criteria, e.g., organic status or sustainability standards. The

proposal to digitalise the organic control system as foreseen in the NRPP Regulation<sup>84</sup> (see Chapter 1) is also relevant in this context.

The digitalisation of data collection also provides an opportunity to address the simplification challenge without interpreting it in the very narrow sense of how the number of variables collected can be reduced. It might then be possible to add an organic indicator variable, as has been done under SAIO for the plant protection products, and under FSDN. The need to address organic representativity in FSDN samples and to restore in-conversion data in SAIO was acknowledged. The ability to link data sets, and to use organic indicators for key variables, could become much better as part of the digitalisation process.

Allowing control body access to IACS or other similar data on individual farms, for example land parcel mapping data, could also help streamline certification procedures. This would require control bodies to be either given public authority status, or for consent mechanisms to be implementing allowing farmers individually to consent to control bodies having access, reducing the duplication of data provision.

Developments with respect to sustainability benchmarking and the Farm Sustainability Compass, and the specific need to ensure the inclusion of organic-specific data and research evidence were also discussed. From the Commission's perspective, this is not intended to be a top-down process, and the intention is to actively engage with agricultural sector representatives and stakeholders in the development process. There would be outreach from the Commission very soon to take this forward.

The need for better data for market forecasting, including the EU Agri-Outlook reports, and policy modelling, including IFM-CAP and CAPRI, was acknowledged. The models used in these contexts often do not have an organic specific component, requiring assumptions concerning input use and yield impacts to be made. More could be done if better data and more general information about organic production methods and markets were available. Ideally it would be good to be able to link growth in production areas directly to market growth forecasts.

Opportunities to keep in contact with respect to both statistics and market data, and market forecasting and policy modelling, would be welcome. The idea of an 'expert advisory group' to support this process could be explored further.

### 8.3.2 Organic Summit, Copenhagen, August 2025

The Organic Summit<sup>85</sup> was held as part of the Danish Presidency of the European Union and brought together organic sector stakeholders and policymakers from many countries. Many of the themes and policy recommendations discussed during this conference, including those featured in the Conference Charter and the Session summaries, are relevant to the work in the OrganicTargets4EU project. There was no specific workshop focused on statistics and market data. However, throughout the conference issues where good data is important (environmental impact, market demand, prices) were frequently referenced (Anon, 2025).

### 8.3.3 Final OrganicTargets4EU project conference, Brussels, November 2025

At the final conference of the OrganicTargets4EU project, an international audience of stakeholders and policymakers heard about some of the results of the project and a summarised version of the emerging policy recommendations. In a World Café exercise, participants had the opportunity to reflect on the policy recommendation and to identify specific priorities and additional considerations.

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<sup>84</sup> COM(2025) 565 final Regulation 2025/0240 (COD): Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the European Fund for economic, social and territorial cohesion, agriculture and rural, fisheries and maritime, prosperity and security for the period 2028-2034 and amending Regulation (EU) 2023/955 and Regulation (EU, Euratom) 2024/2509.

<sup>85</sup> <https://organicsummit.org/>

The participants considered all the recommendations to be relevant in general terms. Specifically, there was a need for better integration in all areas in the long-term.

With respect to the SAIO Regulation, there is a need to restore the cuts made to conversion and livestock data. This would require better guidance on data flows with countries, better allocation of resources and harmonisation of data allocation. Problems of alignment between national statistical and control body databases were highlighted—a unified approach would be desirable. In some countries, such as France, yield and output data have been collected in the past, but budget cuts have reduced their ability to main organic-specific statistics. Better integration with national statistical bodies, as envisaged with the SAIO Regulation, could help to address this.

For market data, more transparency on margins for the entire value chain and the share of organic products at retail level were highlighted.

For trade (import/export) data, while TRACES can be used to track organic imports from third countries into the EU, export data are missing, and the intra-EU trade data is inconsistent. There is some experience in Germany with piecing together fragmented import data obtained using multiple methods (import data, importer surveys and household panel data). The inclusion of organic-specific Harmonised System codes within the EU should be made mandatory.

The relevance of FSDN for farm financial data was recognised, but access to the data was seen as problematic and sometime as being used against farmers' interests, discouraging farmers from participating and making data available. Generally, data access and transparency were seen as major barriers, with the need for better co-ordination between EU and national agencies to make the FSDN data more useful for policy design and evaluation.

## 8.4 Policy recommendations

Good quality and timely statistical and market data are essential for market transparency and effective business and policy decision-making, including conversion to organic production and engagement in organic value chains. They are also essential for the evaluation of policy outcomes, from a production, environment, social and market perspectives.

In the long-term, with the organic sector approaching 20-25% of EU agriculture, the **overall aim** should be to ensure there is an organic equivalent for all agricultural and food statistics. Specifically, we recommend that:

**The EU Commission should prioritise improving the collection, availability and reporting of organic data, including adapting the relevant legal frameworks, by:**

- Reviewing the implementation of the SAIO Regulation to restore conversion, livestock and other data losses, and to address inconsistencies between the various Implementing Regulations. The relevance of SAIO statistics to environmental policy evaluation should not be restricted to the use of plant protection products.
- Improving trade data availability, also for the internal market, by including an organic identification digit in the Harmonised System codes.
- Establishing an EU Market Observatory for organic market data, including price, retail sales, out-of-home catering and other relevant data, and encourage related national/regional initiatives in Member States (see also Organic Action Plan recommendations). Existing commercial and organic sector initiatives to collect and report on organic market data should be integrated in this process.
- Improving the representativity of organic farming in FSDN, including encouraging Member States to oversample organic farms to reduce small sample size problems, with appropriate weightings applied for onward transmission to EU-FSDN.

- Including a specific focus on organic farming in environmental sustainability data (FSDN, EEA) and engaging with the organic sector to ensure appropriate inclusion of data and research evidence in sustainability benchmarking and the planned Farm Sustainability Compass tool.
- Improving the potential for data exchange between certified businesses, organic control bodies and public authorities, for streamlining the certification process and policy implementation to avoid multiple data provision, and for use of data collected to evaluate production, market and environmental outcomes. The proposals for the next CAP to strengthen digitalisation, with electronic organic control systems, data governance authorities, unique business IDs and the European Business Wallet, are highly relevant in this context.

**Member States should prioritise improving the collection, availability and reporting of organic data, by:**

- Improving the quality of data and representativeness of organic farms in national FSDN datasets by over-sampling organic farms to ensure minimum sample sizes by farm type. These can be adjusted by appropriate weightings for total agriculture to maintain the representativeness of the total sample.
- Partnering with businesses, commercial data-houses and organic sector organisations to generate reliable market data, including prices, quantities, retail and out-of-home catering sales value and volume, individual product sales values and volumes, shares of imports and exports. National organic market observatories would enable a specific focus on organic data to be maintained
- Improving yield and product output data by including organic identifiers in crop yield statistics and harvest estimates. This would contribute to meeting the SAIO Regulation requirements and could enable the generation of organic supply balances for individual products, also for certification monitoring.
- Ensuring that organic farming is fully represented in national statistical reporting, market forecasting and policy modelling and evaluation activities.

## 9 Aquaculture

The aquaculture sector in Europe is still far from reaching its full potential in terms of growth and meeting the increasing demand for more sustainable seafood. The EU imports over 80% of the seafood that it consumes. Aquaculture products overall (including imports) represent 30% of EU consumption of seafood, while EU aquaculture products represent only 10% of EU consumption (EUMOFA, 2022a).

Aquaculture in the EU, when compared to aquaculture in other non-EU countries, is subject to some of the strictest regulatory requirements for quality, health and the environment. But even so, EU aquaculture can still further improve its environmental performance and thereby contribute to the objectives of the European Green Deal (EC 2019) and related strategies.

The challenges of achieving greater sustainability in global agriculture have been reviewed, among others, by Becke et al. (2025). However, they do not mention organic aquaculture and generally in the literature only limited attention has been paid to organic aquaculture specifically (e.g., (e.g., EUMOFA, 2022b), with the results of this project providing a first detailed assessment (Toomey et al. 2025).

### 9.1 Project results and policy context

Organic aquaculture was a specific focus in many parts of the project, often requiring separate assessment to address its unique circumstances. Based on EU and national sources, the total organic aquaculture production in the EU27 is estimated by EUMOFA at 73,570 tonnes in 2020 accounting for 6.7% of the total EU aquaculture production. As a comparison, the EU organic aquaculture production in 2015 was estimated at 46,341 tonnes at EU27 level (49,723 t at EU28 level), accounting for 4% of the EU aquaculture sector (EUMOFA, 2022b).

The main producing country is Ireland with 18,050 t organic aquaculture production, accounting for almost half of the total national aquaculture production. Organic aquaculture production in Italy, France, Netherlands, Spain, Germany and Denmark ranges from 5,000 to 10,000 t and Bulgaria, Hungary and Greece from 1,000 to 3,000 t. The other countries account for a production of less than 1,000 t. The 2020 production ranking in the EU27 by species is:

- Mussels, with 41,936 t certified organic, mainly produced in the Netherlands, Italy, Germany, Denmark, France and Spain.
- Salmon, with 12,870 t certified organic, mainly produced in Ireland.
- Trout, with 4,590 t certified organic. France accounts for half of the production (with 2,346 t), followed by Spain (917 t) and Denmark (642 t).
- Carp, with 3,562 t certified organic, mainly produced in Hungary, Romania and Lithuania.
- Oysters, with 3,228 t certified organic, almost exclusively located in France.
- Other species are European seabass/gilthead seabream, with 2,750 t certified organic. The main producing country is Greece with 57% of the EU production.

However, it is worth noting that, since 2020, there have been signs of a decline in organic production for some species.

#### 9.1.1 Production systems: barriers, constraints and future trends

A quantitative systematic literature review was conducted in WP1, with the aim of identifying and analysing the factors that either constrain or support the development of European organic aquaculture, including technical, business and policy issues (Lampkin et al., 2024; Toomey et al., 2025). The overall search strategy was based on the PRISMA protocol, including both peer-reviewed articles and grey literature. An initial pool of more than 170 documents was screened for eligibility, bringing the final

number of documents selected to 82. The review focuses in particular on the species most farmed in European organic aquaculture, including both freshwater and marine species, namely Atlantic salmon, rainbow trout, common carp, European sea bass, gilthead seabream and shellfish.

The top six constraining factors identified were:

- Perceived feasibility of organic aquaculture from the farmers' perspective
- Price difference between organic and conventional products for consumers
- Availability and costs of organically produced inputs (e.g., juveniles, feed)
- Level of bureaucratic complexity and applicability of organic aquaculture rules
- Consumer awareness and knowledge about organic aquaculture practices and product added value
- Availability of incentives (support payments and investment aids)

The top supporting factors identified were:

- Marketing strategies for organic products
- Consumer demand
- Availability of incentives (support payments for farmers, subsidised prices for consumers)
- Consumer attitudes and beliefs
- Research towards technical solutions and innovations for organic aquaculture
- Awareness and knowledge about organic aquaculture practices and product added value.

As part of the project, in the framework of modelling (Schiavo 2025b), future typologies for organic aquaculture systems were developed, based on existing literature and expert judgement, under two contrasting scenarios: "optimistic" and "pessimistic". These sought to identify the major trends in the evolution of aquaculture systems the drivers of these trends. Different outcomes were projected for different species.

For **trout** farms:

- Scenario "optimistic": Planning security for investors will lead to an increase of total number of farms and production volumes. This will be mainly due to establishment of new large farms. Number of small farmers will stay stable or slightly increase. Consumer demand for sustainable seafood products will lead to an increased number of organic farms (pond farms as well as raceways). Main drivers will be the policy, as well as consumer demand. Clear long term (> 10 years) policy support for a specific culture system will lead to investments in the aquaculture sector. Also, consumer demand for organically produced fish will be a strong driver for farmers to convert to organic production, both small farmers (direct marketing), as well as larger producers (marketing via retailers).
- Scenario "pessimistic": There is no clear political vision and direction regarding support of certain farm types. Total number of farms will stay stable or slightly decrease. Regarding production systems, there will be a trend towards large raceways. Number of small pond farms will decrease.

Looking forward to 2035, it can be expected that rainbow trout will remain the most economically relevant species for the EU inland based aquaculture. There will be a trend towards raceways and semi-recirculating raceway systems, but the existing systems (traditional ponds, raceways, semi-recirculating raceways) will all remain. Traditional farming in earthen ponds may be developing into more technological farms using varying degree of water purification, reuse of water, oxygenation etc. Other systems of interest might be based on the "multifunctional pond fish farming". Integrating fish production with nature reserves, renewable energy production, recreational angling, and eco-tourism facilities, such as a health and leisure centre, and excursions such as wildlife watching, all on one site.

For **sea bass/sea bream** farms:

- Scenario “optimistic”: Several farms are converting or choosing exclusively organic farming. But for this to happen, a limited change in EU organic legislation is needed, as well as research and innovation activities are needed to produce not only organic sea bass and sea bream, but also a variety of species such as meagre, amberjack, etc. Also, a breakthrough for cost effective organic feed will be necessary. A clear political vision would help overcome these obstacles and provide help, advice and funding in order to see an increase in labour and productivity. Consumer demand is another important driver, assuming breakthroughs in culture systems, the production cost of organically grown fish can decrease.
- Scenario “pessimistic”: The uncertainties facing the sector are great and issues will arise not only for organic but conventional aquaculture, in the future. However, there is a big trend from both the industry and policymakers towards monopolisation by very large companies and their economies of scale can procure a smaller cost, so the small companies are either removed from the market or they are bought out.

Looking forward to 2035, it is possible to foresee that, in addition to the current systems, some of the existing farms could incorporate the principles of the Integrated Multi-Trophic Aquaculture (IMTA). Although organic production is currently limited, and in some countries on the verge of extinction, with the support of adequate regulations, the EU market could absorb increasing shares of production so that current systems are unlikely to disappear. New species, such as the greater amberjack, are good candidates for both current and future systems. IMTA systems could be integrated into all types of aquaculture (conventional, organic and extensive in lagoons). Although many bottlenecks still remain posing a problem in the actual integration of IMTA in real working farms.

For **shellfish** farms:

- Scenario “optimistic”: There is an increase of the number of farms converting or choosing solely to grow organic. This is following the overcome of regulatory barriers still present in the EU legislation on organic shellfish water quality. Valorisation of IMTA principles into the organic legislation will support also organic shellfish farming.
- Scenario “pessimistic”: There is no clear political willing to overcome the drawback due to a restrictive interpretation of ‘equivalent quality to zone A’. Therefore, only farms located in zone A will be able to maintain the organic certification, while all others will lose their certification and the new entries cannot be significant.

Looking forward to 2035, in addition to the current typologies of shellfish farming (i.e., Rafts, Long line, Bottom cultivation), the IMTA systems could gain room for growth. Organic shellfish farming is currently facing the uncertainty due to regulatory barriers present in the EU legislation on organic shellfish water quality. Clarification or amendments on the interpretation of “equivalent” quality to zone A in the organic regulation is needed to avoid the risk of marginalisation of the organic production. IMTA systems could gain more importance and market shares, if a clear long term policy support will be provided to overcome the current bottlenecks limiting the actual integration of IMTA in real working farms.

### 9.1.2 Policy support for organic aquaculture production

In principle, the policy frameworks in place (Common Fisheries Policy, European Maritime Fisheries and Aquaculture Fund EMFAF, Green Deal and Farm to Fork Strategy, national multi-annual plans for aquaculture) could provide support for organic aquaculture, but the data available on support provided are rather poor, an issue also identified by the European Court of Auditors report. Policies implemented in Austria, Croatia, Denmark, France, Germany, Greece, Ireland, Italy and Spain, which account for 80% of organic aquaculture production in Europe, were analysed in the framework of WP1 (Lampkin et al.

2024). Although most of the priorities identified in the above-mentioned documents include reference to typical key words of organic principles and explicitly support organic aquaculture, most funding is allocated to individual projects, and statistics do not distinguish between organic and other projects, making it impossible to get a clear overview of support specifically allocated to organic aquaculture. Specific themes identified include:

- Reduction of sales of antimicrobials and a significant increase in organic aquaculture
- Implementation of spatial planning for organic aquaculture (organic pond management, conversion, products, shellfish production)
- Integrated multi-trophic aquaculture systems (IMTA)
- Organic certification and labelling
- Specific requirements of the EU regulation on organic production (organic feed, juveniles, shellfish water classification)

Although the emphasis is on generic sustainable aquaculture practices, the Strategic Guidelines for the Sustainable Development of EU Aquaculture also support the goals of the Farm-to-Fork Strategy, expressly a significant increase in organic aquaculture.

The European Commission has encouraged Member States to include the development of organic aquaculture among the objectives of their Multi-annual National Strategic Plans (NSPAs) for sustainable aquaculture 2021-2030. Nevertheless, the analysis of the status of organic aquaculture seems poorly developed in the Multiannual national aquaculture plans. Indeed, it seems that countries are paying more attention to other forms of sustainable farming, rather than organic aquaculture. This is evident from the limited emphasis placed on identifying objectives and activities that specifically promote the development of organic aquaculture, when contrasted with the considerable effort allocated to the analysis and promotion of key actions for the development of conventional aquaculture.

Another tool to support the development of organic aquaculture is the European Maritime, Fisheries and Aquaculture Fund. Also in this case, the identification of objectives and activities aimed at promoting the development of organic aquaculture in the national programmes of the EMFAF 2021/27 is not very detailed compared to the identification of key actions for the development of “conventional” aquaculture. It is also noteworthy that the statistics on the use of funds do not distinguish between organic and other projects. In addition to this, funds available for aquaculture development does not necessarily result in actual expenditure, as the many local authorities responsible for the EMFAF expenditure are not always in a position to support their planning and/or may be encouraged to adjust their planned spending priorities.

From the Delphi consultations in (Cisowski & Serre 2024) (see below), the following key actions for supporting organic producers were identified:

- 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 programmes should be enforced, because organic certification is so far only supported along/next to other sustainable action. There is no differentiation between organic and other schemes requiring less investments.
- Currently there is no or little incentive for producers to convert to organic aquaculture. Indeed, farmers must pre-finance for relatively long time periods (long production cycle in aquaculture until the product can be marketed).

Toomey et al. (2025) conclude that, from a policy standpoint, the CFP 2021-2027 demonstrates an increased commitment to sustainable practices, **including** organic aquaculture, compared to the 2014-2020 period, as evidenced notably by the strategic guidelines for the sustainable development of EU aquaculture. These guidelines offer concrete recommendations to the Commission, Member States, aquaculture producers, and other relevant actors. The aforementioned recommendations encompass the promotion of organic aquaculture and other aquaculture systems that exhibit a reduced environmental impact, the promotion of organic aquaculture certification and labelling, the promotion of organic production, which stipulates more specific requirements on animal welfare, and the implementation of spatial planning measures that ensure the availability of designated areas for organic aquaculture.

At the national level, the organic aquaculture policies are incorporated into the Multi-Annual Strategic Plans for Aquaculture. However, we showed a relative paucity of attention on the promotion of organic aquaculture compared to global sustainable conventional aquaculture, despite the fact that measures are more oriented towards organic aquaculture for the 2021-2027 period compared to 2014-2020. The development of organic aquaculture is supported by European and national funds, which have been and are currently used in the implementation of strategic guidelines. However, a commitment difference can be seen across member states. Moreover, in contrast to the identification of critical actions for the development of a sustainable conventional aquaculture, the goals and initiatives intended to support the growth of organic aquaculture in the national operational programs of the EMFF 2014-2020 and the EMFAF 2021-2027 are generally not very detailed.

A comprehensive evaluation of the utilisation of these financial resources for organic aquaculture was hindered by the absence of consolidated data. The current financial cycle (2021-2027) has seen an augmentation in funding compared to the previous one (2014-2020), which suggests the potential for enhanced support for organic aquaculture. However, no specific funding was identified to be allocated exclusively to organic aquaculture, and the level of funding will be contingent on the submissions of projects by organic companies. Overall, our findings underscore the significant room for enhancement in the configuration and execution of organic support. This enhancement is critical to align with the aspirations of the EU Commission and Member States while concurrently safeguarding the attainment of environmental, food security, and public health objectives.

A further element of concern derives from the Commission's choice, as part of the EU's long-term budget for the 2028-2034 period (see Chapter 1), not to present a separate fund to support the Common Fisheries Policy (CFP)<sup>86,87</sup>. Instead, support for fisheries, aquaculture and ocean-related activities would be integrated into a single, larger fund that also covers other areas, such as cohesion and agriculture. On 23 September 2025, the Commission presented the Multiannual Financial Framework (MFF) proposals to the Parliament's Committee on Fisheries (PECH). Members strongly criticised the MFF's structure, the loss of a dedicated fund, the drastic budget cut, and the high national spending flexibility. They noted that the proposed budget cut is much greater than the cuts for other policies, such as agriculture and cohesion, and that the EU budget, as a whole, is increasing. Members pointed out that the minimum amount is not legally ring-fenced, as it is not included in any regulation. They noted that, although Member States could use unallocated amounts from the NRP Fund or the European Competitiveness Fund, the seafood sector would be competing with larger sectors for these amounts. Moreover, Members pointed out that the CFP is a genuine EU policy, and that the absence of preset measures and related rules on co-financing and maximum aid intensity rates will result in an uneven playing field between Member States.

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<sup>86</sup> [Questions and answers on the new 2028-2034 budget proposal – fisheries, aquaculture and ocean-related activities - Oceans and fisheries](#) (accessed 30.01.26)

<sup>87</sup> Europe's Budget: Fisheries, aquaculture and the ocean. [MFF\\_MARE\\_Factsheet.indd](#) (accessed 30.01.26)

The loss of the dedicated EMFAF fund, through the integration of fisheries and aquaculture support into broader national programmes, coupled with the considerable autonomy granted to Member States in designing their national measures, risks weakening the uniformity and traceability of fisheries and aquaculture related spending, including support for organic aquaculture specifically. This may, in turn, hinder the European Parliament's ability to scrutinise such spending effectively. This is a relevant concern given that CFP is one of the few areas of exclusive EU competence. The Advisory Councils (ACS) also noted that reallocating EU spending through a single fund under a single national programme per Member State would be detrimental and contrary to the necessary targeting of support. Although the EMFF was replaced by the EMFAF in the current programming period to reflect a greater focus on aquaculture, we have already highlighted in our analysis that the specific objectives for the development of organic aquaculture were found to be rather lacking in detail, and the new proposals are likely to make this worse rather than better.

The European Economic and Social Committee (EESC), at the plenary session of 22 January 2026 strongly opposed the proposed reduction of cohesion policy and common agricultural policy (CAP) funding in the next MFF, stressing that such cuts would undermine the effectiveness of EU policies, which have proven successful in advancing EU objectives. The EESC also opposes the plan to merge resources for cohesion policy, European Social Fund Plus (ESF+), CAP, fisheries, migration and security into a single fund, as currently designed, and calls on the European Commission to revise its proposal on the national and regional partnership plan (NRPP) fund and urges the Council and the European Parliament to support this position.

### 9.1.3 Supply chain development

Converging views from European aquaculture experts on how changes in the food supply chain can be implemented to promote the development of organic aquaculture by 2030 are summarized below. In the framework of WP4, two rounds of Delphi interviews were carried out with experts belonging to the following categories: consultants, researchers, processors and retailers. The experts highlighted key areas of the food supply chain that should be considered to promote key strategies for the growth of the organic aquaculture market in Europe in the coming years.

#### Technical/regulatory barriers

- We need much clearer and smarter regulations and frameworks. The EU organic regulation is too complex and bureaucratic.
- The optimal solution would be to change regulation framework (smart regulatory framework) and support organic aquaculture making organic aquaculture less expensive (e.g., smart taxes).

#### Selling prices and production costs

- The problem arises from very limited production, which does not allow economies of scale.
- In addition, the costs for certification and organic feed are very high, so it is logical that prices are also high.
- Only if production improves will prices fall and this price difference will be passed on to supermarket shelves, to the benefit of the consumer, with a consequent increase in demand.

#### 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 this sector 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

#### 9.1.4 Consumer demand

The Delphi analysis also highlighted the need to raise consumer awareness of organic through better communication, specifically:

- 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—most consumers think that they are not good to eat
- Highlighting quality and sustainability of organic seafood would generate greater consumer trust.
- But, since retailers are the main motor of organic aquaculture, they would have to act on better communication.
- Specialised organic retailers need to more actively communicate the benefits of organic aquaculture products.

With respect to organic aquaculture supply chains and consumer demand, Toomey et al. (2025) conclude that, while there is an increasing demand for organic aquaculture products in the EU, the market remains niche. Following an initial phase of development, most of the countries have shown signs of stagnation (if not regression), with a few exceptions, also reflecting the current state of the global European aquaculture sector. Strict implementation of the regulation on organic aquaculture appears to have preceded the widespread adoption and consolidation of production, and more crucially, the resolution of significant technical challenges, resulting in a lack of the anticipated growth in the sector.

#### 9.1.5 Knowledge and Innovation Systems (advice, mentoring, training, education)

The national multi-annual aquaculture plans examined in WP1 (Lampkin et al. 2024) do not contain any objectives for the development of KIS for organic aquaculture or only mention general objectives, without any specific organisational aspects. In the national organic action plans, organic aquaculture is sometimes mentioned, but with no concrete actions to be taken, specific content, objectives or approaches.

Interviews and online surveys with aquaculture experts in the three focus countries, Germany, Greece and Italy, highlighted bottlenecks and blocks, as well as recommendations for the development of the KIS for organic aquaculture. Key findings included:

- In general, the actors who are engaged in supporting the knowledge and innovation system for organic agriculture do not have specific competence to support innovation in organic aquaculture. Similarly, the actors who are engaged in supporting the knowledge and innovation system for conventional aquaculture do not have adequate competence to support innovation in organic aquaculture.
- The organic aquaculture industry is not enough developed, so it does not reach the critical mass necessary to generate an adequate interest of "advisory service providers". In addition to this, there are technical issues/bottlenecks in the organic regulation, which hold back the development of organic aquaculture.
- Overcoming technical issues/bottlenecks in the organic regulation and making available economic incentives could help industry growth, which in turn would trigger more consideration by advisory service providers.
- Low availability of organic seafood on the market and lack of marketing strategies are seen as relevant weakness.

- The level of integration of knowledge networks is definitively fragmented. In addition to this, consumers are confused by the presence of many "sustainability" certifications on the market and large retailers do not promote the organic label on aquaculture.
- The advisory system does not seem organized to help integration into national/international markets, branding and marketing, which would be highly beneficial for farmers. Maybe it is a bit more present in production-oriented advice, with a focus on technologies.
- As the private advisory system does not seem particularly interested in promoting extension/advice services for organic aquaculture, perhaps a greater commitment at institutional level could fill the gap in such services.
- There is no structured and consolidated hub for knowledge creation and innovation in organic aquaculture. Maybe, some individual initiatives are carried out by research institutions.

To address the issues above, the following policy recommendations were specified:

#### **Lack of strategic/action plans and funds to support KIS**

- Establish specific units on organic aquaculture in national and regional governmental bodies to support regulation and planning.
- Make development plans mandatory, including communication and marketing plans.
- Provide allocated funds addressing KIS development for organic aquaculture.

#### **Lack of institutionalised knowledge creation and dissemination**

- Foster development of practice-oriented research system (beyond ad-hoc research projects), together with a multi-stakeholder engagement process to facilitate effective knowledge transfer.
- Support knowledge creation and exchange based on farmers' needs.
- Establish mechanisms to feed research results to advisory system, training and education.
- Foster on-site experience and knowledge sharing.

#### **Lack of structured support for advisory services, education and training**

- Integration of organic aquaculture profiles into the organic advisory system and in organic curriculums in education and training.
- Promotion the development in the private sector of educators, trainers and advisors

### **9.1.6 Research and Innovation**

The Delphi survey of aquaculture experts in WP4 identified the following priorities with respect to research and technical innovation and diversification:

- Improving technology in fish production and processing, is an opportunity to be kept for rearing new species and developing new products/packaging (e.g., fillet, smoked, with a sauce, fish ball, etc.).
- The industry needs to improve its environmental footprint, develop models that reduce and replace fish meal/oil with alternative protein sources that are compatible with the natural diet of several fish species, such as insects or plant-based proteins.
- Also, there is a big potential of IMTA as a sustainable system to produce aquaculture. However, more research and proof of concept, that IMTA can be economically successful, is needed.

The new TP Organics Strategic Research & Innovation Agenda (SRIA)(Gernet et al. 2025) is part of the preparation of the next research & innovation Framework Programme (FP10), which will succeed Horizon Europe after 2027. It is a key document defining the R&I needs of the organic sector and supports the transition of the EU food and farming systems. TP Organics is engaging stakeholders at EU and national level in the development process, to make sure the identified R&I priorities reflect the actual needs of the actors on the ground and address practical problems and urgent challenges of the

sector, including farmers, food processors, retailers, consumers and advisors. The discussion about the R&I priorities in WP5 covered the following topics:

- Transforming food production—Towards sustainable, diversified and resilient organic aquaculture farming systems.
- Transforming food processing and distribution. Towards mild organic processing, local seafood supply chains and minimal and reusable packaging.
- Transforming consumption and diets. Towards sustainable and healthy organic diets.
- Transforming food system governance. Towards cooperation and democratisation in the food system, empowering European citizens to co-create the transition.

As a result of the discussions, the following research topics were proposed:

- Facilitate the provision of organic eggs and juveniles, allowing (in the long term) the full life production cycle under organic standards.
- Promote the development and evaluation of novel dietary formulations, feeding regimes, and management strategies across both hatchery and grow-out phases. Particular emphasis should be placed on approaches that incorporate waste recycling and substantially reduce dependence on conventional marine-derived inputs such as fishmeal and fish oil. The exploration and application of naturally derived, alternative ingredients capable of delivering balanced nutrient profiles—including essential amino acids, fatty acids, and vitamins—are central to this objective. Such innovations are expected to play a pivotal role in ensuring the fulfilment of the essential nutritional requirements of organically farmed fish while supporting environmentally responsible production systems.
- Stimulate growth in the sector by developing effective marketing strategies, exploring the use of financial incentives (such as green premiums for farmers and subsidized prices for consumers), simplifying regulations, and supporting increased research funding to drive innovation.
- Facilitate a clear understanding of the requirements in terms of "high ecological status" and "good environmental status" necessary to satisfy the organic production of bivalves and algae, in different marine environments.
- Promote alternative organic aquaculture systems where waste from farmed fed species is consumed by lower trophic species (e.g., IMTA), reducing the flux of nutrients into the environment.
- Facilitate AI applications and predictive modelling on fish key performances indicators to improve the sustainability and profitability of the organic aquaculture.

The Leopoldina report (Becke et al., 2025) includes a chapter on science and innovation for sustainable aquaculture, including alternative feed protein sources and circular production systems such as recirculating aquaculture systems (RAS) and integrated multi-trophic aquaculture (IMTA). The report also covers issues relating to consumer awareness, market demand, training and policy support, with many of themes relevant to organic aquaculture even if the topic is not addressed specifically.

### 9.1.7 Conclusions

Numerous constraining and supporting for the development of organic aquaculture in EU nations were identified by the literature analysis (Toomey et al., 2025). Because these issues are frequently interconnected, officials in the EU and Member States must take a comprehensive approach and engage seriously. The analysis identified significant constraints that currently impede the development of organic aquaculture, including the applicability of regulations. This is in line with the call for a review of certain aspects of the prevailing regulation on organic aquaculture in the multi-annual national plans of Denmark and Ireland.

In addition, efforts should be concentrated on two key areas: (i) enhancing the feasibility of transitioning to organic farming for farmers by addressing issues such as the cost and availability of organic inputs,

optimising administrative processes, and providing enhanced premiums (e.g., eco-premiums) to encourage organic production; and (ii) fostering greater consumer awareness of organic farming methods and product value through targeted marketing campaigns and offering sufficient incentives to consumers (e.g., subsidised prices) to influence their choice towards organic products.

In order to address these issues and achieve the objectives set out in the EU's farm-to-fork strategy for organic aquaculture, collaboration between policymakers, farmers, academics and other relevant stakeholders is essential. In addition, it is interesting to note that the challenges can vary depending on the species produced, making country and species-specific approaches needed in addition to global European analyses. Finally, it is interesting to note that the global patterns observed in organic aquaculture also reflect those seen in EU aquaculture as a whole, and that analyses of the growth of both conventional and organic aquaculture should be considered in parallel.”

In a separate review of barriers and constraints for organic aquaculture in Germany, Klinkmann et al. (2024) concluded that further systems development, stronger consumer organisation, policy support and strategies to deal with predators of pond fish were needed.

## 9.2 Aquaculture policy workshop

The aquaculture workshop was held on-line in May 2025 with the participation of stakeholders from several EU countries. The presentations to introduce the discussion topics were focused specifically on aquaculture, using a similar structure to that of the national workshops with an agriculture focus. The information was drawn from the aquaculture parts of WPs 1, 2, 3, 4 and 5 (see above).

The preliminary question posed to the workshop participants was: *Do you think that the current European Regulation for organic aquaculture needs changes to generate growth of the organic production?* The answer had a symbolic meaning: *Some changes 58%, Many changes 42%*. Below, we present a summary of the other opinions expressed by the experts.

### 9.2.1 Policy support for organic aquaculture

Participants were asked if they consider the promotion of the organic aquaculture clearly addressed in the Multi-annual National Aquaculture Plans. 58% of participants considered the promotion of organic aquaculture to be poorly addressed in the Multi-Annual National Aquaculture Plans, and 17% considered it not addressed at all, while only 17% considered the promotion of organic aquaculture clearly addressed.

Participants were also asked if they consider the objectives and activities aimed at promoting the development of organic aquaculture in the national programmes of the EMFAF clearly addressed. The objectives/activities aimed at promoting organic aquaculture were considered poorly (58%) or not (25%) clearly addressed in the national EMFAF programmes. Most participants did not know (58%) or knew a few (25%) aquaculture farms that have been supported and funded in their conversion to organic aquaculture through institutional policies.

### 9.2.2 Organic aquaculture: supporting and constraining factors

Participants were asked to rank, in a scale from 0 (not important) to 10 (important), a number of supporting factors to the development of organic aquaculture from a pre-defined list. All factors were considered important for the development of organic aquaculture. Participants considered consumer demand to be the most important factor, followed by marketing strategies, awareness of and knowledge about organic aquaculture practices, consumer attitudes and beliefs, the availability of incentives, and finally research and innovation for technical solutions.

Participants were also asked to rank, in a scale from 0 (not important) to 10 (important), a number of constraining factors to the development of organic aquaculture from a pre-defined list. The most important constraining factor was considered to be the availability and cost of organically produced inputs, followed by the price gap between organic and conventional products, the administrative complexity and applicability of organic rules, and the lack of awareness and knowledge about organic practices and product added value. This latter was considered equally important to the availability of incentives. The least important factor according to participants was the perceived feasibility of organic aquaculture.

### 9.2.3 Supply chain development and consumer demand

Given the small size of the sector, concerns were raised about the impacts of monopolistic practices on both the supply and demand side and the need for more support for small and medium-sized companies, and well as a reduction of organic prices to levels closer to conventional.

A series of potential changes to be implemented in the food supply chain to promote the development of organic aquaculture were ranked according to their importance, with 0 meaning “not important at all” and 10 meaning “very important”. All factors were considered important. Participants considered supporting organic producers to be the most important factor, followed by promoting technical innovations and diversification, lowering selling prices and/or production costs, boosting organic food in out-of-home catering, and finally removing technical and regulatory barriers.

There was a clear recommendation that a consumer-oriented communication strategy should be established together with retailers to improve consumer awareness, engagement and demand.

### 9.2.4 Knowledge and Innovation Systems (advice, mentoring, training, education)

Participants were asked if they consider the Knowledge and Innovation System (KIS) for organic aquaculture enough developed in their country. 36% of participants estimated that it had developed somewhat, 29% that it had not developed at all, and 21% that it had developed properly.

Participants were then asked how much they feel the private advisory system interested in promoting advisory/extension services for organic aquaculture, in their country. 61% of participants estimated that the private advisory system was interested in being involved, albeit to a small extent, in the promotion of advisory/ extension services for organic aquaculture, while 31% estimated that it was not interested.

Participants were also asked if the objectives for the development of KIS for organic aquaculture are sufficiently addressed in the **National Organic Action Plan** or in the **National Multi-annual Plan for Aquaculture**. 46% of participants felt that the objectives for developing KIS for organic aquaculture were not adequately addressed in national plans, while 31% thought they were addressed, but poorly.

Finally, participants were asked to rank, in a scale from 0 (not important) to 10 (important), several recommendations to strengthen the Knowledge and Innovation Systems KIS for organic aquaculture. They considered the promotion of organic aquaculture and market development to be the most important, followed by the creation of structured support for advisory services, education and training. This was almost equal to the promotion of aquaculture strategic plans, action plans and funds to support knowledge-intensive services (KIS). The recommendation that was considered the least important, but still important, was the promotion of industrialised knowledge creation and dissemination.

### 9.2.5 Research and innovation

Among the themes discussed, developing innovations to improve the impacts of aquaculture on nature and the environment, and developing alternative feeds, using proteins of nonanimal origin, were identified as important (see also Becke et al. 2025).

Participants were asked to rank, in a scale from 0 (not important) to 10 (important), some recommendations for the SRIA developed in WP5. They considered the three most important recommendations to be the facilitation of the provision of organic eggs and juveniles, the development of effective marketing strategies to stimulate growth in the sector, and the exploration of financial incentives. However, all recommendations were overall considered important.

### 9.2.6 Statistics and market data

This issue was not addressed in the workshop.

### 9.2.7 Capacity building

This issue was not addressed in the workshop.

### 9.2.8 Aquaculture and organic action plans

Participants were asked if they consider the promotion of the organic aquaculture clearly addressed in the National Organic Action Plans. The promotion of organic aquaculture was considered poorly (42% of participants) or not (42%) addressed.

Finally, some specific considerations were raised by participants and are listed here:

- The need to emphasise the low environmental footprint of both organic and non-organic aquaculture when communicating about it.
- The complexity of the issues raised makes identifying solutions difficult.
- Regulation rules on fish health, feed, farm practices and juvenile sourcing need to be addressed.
- The identification and communication of the benefits of organic aquaculture for consumers and society is crucial.

## 9.3 Other perspectives

### 9.3.1 FEAP regulatory concerns

We present here a summary of the main findings and recommendations pointed out by a scientific and technical study on the obstacles to the effective implementation of EU legislation on organic production in aquaculture carried out by the Federation of European Aquaculture Producers (FEAP)<sup>88</sup>. A two-stage investigation was conducted. First, a questionnaire was delivered to feed or fish producers or producer representatives. Following the questionnaire, 45-minute to 1-hour follow-up interviews were conducted in October 2025. The study focuses specifically on European sea bass (*Dicentrarchus labrax*), Gilthead seabream (*Sparus aurata*), common carp (*Cyprinus carpio*), Atlantic salmon (*Salmo salar*) and rainbow trout (*Oncorhynchus mykiss*), although it also mentions meagre (*Argyrosomus regius*). This study reveals that structural and systemic constraints compromise the economic viability and expansion of organic fish farming.

Feed-related challenges are at the forefront, particularly the high cost of certified organic feed, the limited availability of adequate certified ingredients, particularly for new species and early life stages, and the restricted number of suppliers with limited formulation flexibility under current organic

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<sup>88</sup> <https://feap.info/>

regulations. The above feed issues are the main obstacle to profitability and scalability, particularly for carnivorous species that rely on marine-derived proteins. The second major bottleneck is organic-certified juvenile availability, where scarce hatchery production has forced some farmers to rear their own broodstock, which can increase costs and operating complexity, while many others were forced to stop the organic production. Market-related weaknesses also persist, with insufficient price premiums and limited consumer awareness dampening demand and deterring further investment. Regulatory and operational barriers, including difficulties in obtaining licences, the inability to access new production sites, and the lack of expertise of certification bodies about organic aquaculture, further complicate expansion efforts. While species-specific challenges vary, they commonly reflect these overarching issues. The results indicate that the sector is constrained by a combination of intertwined technical, economic, and regulatory barriers.

### 9.3.2 EU Commission interviews, Autumn 2025

Interviews were conducted in September and October 2025 with representatives from different units within the European Commission covering the different themes in this report. A draft of the aquaculture recommendations was discussed with representatives from DG Agri (Organic Unit) and DG Mare.

The draft recommendations presented were considered to be relevant. One key issue identified was the need to have equivalent status for organic policy support in aquaculture and fisheries policy (the CFP) as is available in the CAP (e.g., production support, AKIS). This would require closer liaison between DG Agri and DG Mare, respectively responsible for organic agriculture and aquaculture.

The discussion focused primarily on regulatory issues, both with respect to bureaucracy and to key problems relating to juveniles and feeds. The request was made for the policy recommendations to be sufficiently detailed to provide ideas on how to solve the problems identified. The specific issue of juveniles and feed were challenging to resolve and are being reviewed by EGTOP, and some new options were now permitted. However, in the context of lack of juveniles leading to less aquaculture and less demand for feed, the feed companies have less interest in trying to find solutions compatible with the regulations, potentially leading to a permanent decline in organic aquaculture production. There may be some opportunities to address these issues in the context of the current review of organic regulations, but this will need to be supported by good evidence, also about the impacts on production levels.

Concerning the possibility to include more specific organic actions in the national aquaculture strategic plans and in EMFAF, this was seen as an important recommendation. The actions and targets should feature in both frameworks. Concerning communication campaigns about organic aquaculture, these might be possible at the European level, with tools potentially provided to Member States by DG Mare. There is a need to distinguish in these activities between 'sustainable' aquaculture in general, and organic aquaculture in particular.

Concerning research, this needs to be addressed with DG RTD, including suggestions for specific research topics. In the last work programme, there were two projects on selective breeding for organic aquaculture, but further discussions will be needed to take new topics forward. Although the resources for the breeding projects were limited, these might help towards the problem of juveniles for some key species, albeit in the long term.

### 9.3.3 Organic Summit, Copenhagen, August 2025

The Organic Summit (Anon 2025) was held as part of the Danish Presidency of the European Union and brought together organic sector stakeholders and policymakers from many countries. Many of the themes and policy recommendations discussed during this conference, including those featured in the Conference Charter and the Session summaries, are relevant to the work in the OrganicTargets4EU project and are therefore considered in some detail here.

As part of the Summit, a workshop on aquaculture with a specific focus on recirculating aquaculture systems (RAS) was held. A starting point was that consumers struggle to understand what “organic farmed fish” means. They expect naturalness, yet aquaculture is far from fish’s natural habitat. Effective storytelling is critical, as willingness to pay depends on trust and clarity. While people say they care about welfare, biodiversity, and climate, buying patterns rarely match their stated values. Fish welfare is less visible than cows or pigs, and consumers often see fish as biomass rather than individuals. Compromises are involved, as fish welfare depends on hygiene, hiding places, and species-specific density. This knowledge gap makes communication even harder thus more important. It was argued that RAS have many advantages as they filter and reuse water, reduce chemical use, and limit emissions. They provide a way to relieve pressure on oceans and combat overfishing of species such as salmon. However, high energy use remains a drawback.

Recirculating aquaculture systems have been considered in detail by both IFOAM and EGTOP (2014)<sup>89</sup> and were judged to be incompatible with organic principles for many reasons, including their extremely high energy consumption, which in conventional aquaculture allows for high stocking densities, essential for making the farm economically sustainable. It is worth considering here that the EGTOP report mentioned above suggested as an alternative strategy the re-use of water which, to some extent, combines the advantages of both flow through systems and RAS, without compromising organic principles. Re-use of water means a kind of extensive recirculation in out-door systems with up to 70 % of reuse of the water.

### 9.3.4 Final OrganicTargets4EU project conference, Brussels, November 2025

At the final conference of the OrganicTargets4EU project, an international audience of stakeholders and policymakers heard about some of the results of the project and a summarised version of the emerging policy recommendations. In a World Café exercise, participants had the opportunity to reflect on the policy recommendation and to identify specific priorities and additional considerations.

In the aquaculture discussions, it was felt that all the recommendations proposed were relevant but that there was a need to prioritise. There were a lot of similarities to organic farming problems, but the aquaculture sector was young and underdeveloped.

There was a perceived need to find ways to convince farmers to convert or to encourage new entrants into the sector. Support payments are important for this, but the mechanisms are less clear than for agricultural support.

There was some discussion around animal welfare issues, and whether different species (e.g., Chang) should be considered to reduce potential problems—the organic approach shouldn’t just copy conventional systems.

Comments were also made about the need to consider circularity more, and to adopt a more flexible approach with regulations, reflecting some of the issues considered in other fora reported above.

## 9.4 Policy recommendations

Organic aquaculture is still at an early stage of development in many countries, and its situation is fragile. Like organic pig and poultry production, the enterprises are very sensitive to input availability and costs (especially feed and juveniles) as well as market demand and prices, and the production and processing systems can be capital intensive. Technical knowledge as well as market and policy engagement are critical. In most cases, it is not possible to integrate aquaculture systems within

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<sup>89</sup> [EGTOP Annex II Draft/Final Report](#)

broader farming systems to capitalise on synergies and provide a buffer when circumstances are challenging. The following policy recommendations are made in this context:

**At EU level, as part of the current review of organic regulations, options for smarter, more flexible regulation of organic aquaculture should be developed, by:**

- Reviewing the **organic regulation** to reduce rigidity and adopt a less one-size-fits-all approach
- Removing unnecessary bureaucracy, particularly for small-scale producers, and promoting innovative solutions that will ease the reporting burden related to organic certification
- Reviewing the most pressing challenges currently faced by organic producers, in particular the **lack of organic juveniles and of organic feed**. Amendments to the regulations regarding the introduction of non-organic juveniles and the current list of permitted ingredients for organic feeds should be discussed in the context of the current availability of certified hatcheries capable of providing organic juveniles and quality and availability of alternative proteins/ingredients for the formulation of organic feeds.
- Clarifying or amending the **interpretation of "equivalent" quality to zone A for shellfish** production in the organic regulation.
- Introducing adaptive rules by species and system if deemed necessary.
- Ensuring that the interpretation of EU organic rules is aligned across all Member States and control bodies in order to minimise any uncertainty experienced by producers.

**At national level, there is a need to provide sufficient incentives to organic producers, as currently for land-based producers, by:**

- Providing **organic support payments** to compensate for higher input costs (feed, juveniles, equipment investment) as well as the necessary support as they transition to organic aquaculture. Equivalent measures to those for organic farming in the proposed CAP Regulation for 2028-2034 should be included in the Common Fisheries Policy proposals.
- Providing **investment aids** for capital infrastructures for production and processing
- Streamlining **licensing and spatial planning frameworks**, including accelerated procedures for certified organic aquaculture projects and designating specific zones for organic aquaculture within Maritime Spatial Planning (MSP) frameworks
- Encouraging Member States to integrate **funded, measurable organic aquaculture targets** into both national aquaculture plans and organic action plans. Specific units on organic aquaculture be established within national and regional governmental bodies to support regulation and planning.

**At national level, there is a need to support organic aquaculture supply chain development and consumer demand, by:**

- Collaborating with **supermarket chains and other retailers** to establish dedicated organic aquaculture product lines, incorporating storytelling and branding, to further raise consumer awareness.
- Using **public procurement leverage** to include organic seafood products in school canteens, hospitals and public catering outlets, creating stable demand and raising consumer awareness.
- Coordinating EU-wide (and national) **consumer promotion campaigns** to highlight the added value of organic seafood (a general campaign about aquaculture products is also required to counteract negative perceptions of them).
- Promoting the consumption of higher-quality organic products by offering price reductions ( e.g., VAT) to consumers.

**At EU and national level, investment in research and innovation, as well as associated advisory and dissemination facilities, is critical, by:**

- Allocating a proportion of the EMFAF or the forthcoming EU Research and Innovation Framework Programme (as well as national funds) to **dedicated research and innovation in organic aquaculture**. This approach will ensure that the focus on organic aquaculture is clearly defined and has a distinct impact, setting it apart from other sustainable aquaculture initiatives.
- Implementing dedicated European (and national) **innovation calls** to support the diversification of organic aquaculture through new species (e.g., greater amberjack, as highlighted in our work) and relevant rearing systems, such as integrated multi-trophic aquaculture (IMTA) which have a high degree of consistency with organic/agroecological principles. In future project cycles, proposals regarding innovations that address the challenges currently experienced by organic producers (e.g., juveniles, feed) should also be further considered.
- Supporting AI-driven predictive models and blockchain-based traceability for organic aquaculture in order to boost efficiency and consumer trust.
- Collating and publishing **data on organic aquaculture production, trade and consumption** in order to provide policymakers and potential investors with a clearer evidence base.
- Supporting the development of organic aquaculture **knowledge and innovation systems**, including advice, mentoring, training, research, statistics and market data, including the development of institutional capacities and peer-to-peer networks/operational groups, linked to public-sector institutions and organic sector organisations.
- Creating national centres of excellence or **innovation hubs** as collaborative spaces for farmers, researchers, feed companies and processors, facilitating the co-development of practical solutions (farmer-driven research and innovation), e.g., the development of new feeds, the integration of IMTA in real working farms and the developments of new products/packaging. These innovation hubs could be delivered by private sector organisation, for example organic organisations.
- Developing **extension and advisory services** in collaboration with accredited organic aquaculture specialists to promote the integration of organic aquaculture into national vocational training. This could enhance support at the farm level and reduce trial-and-error process for new entrants.

## 10 Organic action plans, capacity building, and bio-districts

Given the diversity of the organic sector (goals, systems, practices, products, policies and regulations), there is a need to consider how the best policy mix can be achieved. Over-emphasis on single policy measures (such as area support payments) can result in unbalanced development and have negative impacts on markets and other goals. There is also a need to better ensure the integration of organic policies with other policies for agriculture, food and nutrition, avoiding organic peripherality.

Organic action plans are important tools for ensuring policy integration and coherence, resolving conflicts and maximising synergies between policy measures. They have the potential to achieve a better policy mix, by integrating:

- multiple goals covering public and private goods, focused on local needs and priorities
- supply-push and demand-pull measures, developed with stakeholder engagement
- public and private agencies in delivering the actions
- organic support with overall CAP agricultural and environmental goals
- administrative aspects, avoiding wasteful duplication

Organic action plans have been widely implemented in Europe since the mid-1990s to support the development of the organic sector. Typical policy measures integrated are illustrated in Table 10.1

At the EU level, there have been three action plans since 2004, the second in 2014 and the third in 2021, reviewed in more detail below and in Chapter 1. Action plans at this level provide a basis for actions undertaken by the European Commission but can also provide a basis for recommendations to Member States as part of the CAP Strategic Plans and the proposed National and Regional Partnership Plans.

**Table 10.1: Examples of policies integrated in organic action plans**

Focus	Supply push	Demand pull
<b>Public good</b>	<ul style="list-style-type: none"> <li>• Conversion/maintenance support</li> <li>• Information, advice</li> <li>• Training, education</li> <li>• Professional events</li> <li>• Research</li> <li>• Statistics/market data</li> <li>• Centres of excellence (capacity)</li> </ul>	<ul style="list-style-type: none"> <li>• Tax incentives (e.g., VAT)</li> <li>• Public events, awards</li> <li>• School initiatives (farm visits, gardens, cooking)</li> <li>• Bio-districts</li> </ul>
<b>Market</b>	<ul style="list-style-type: none"> <li>• Capital investment aids</li> <li>• Producer organisations</li> <li>• Meet the buyer events</li> <li>• Supply hubs, logistics</li> </ul>	<ul style="list-style-type: none"> <li>• Organic regulations, logos</li> <li>• Consumer promotion</li> <li>• Public procurement</li> <li>• Agritourism, gastronomy</li> <li>• Export initiatives, trade fairs</li> </ul>

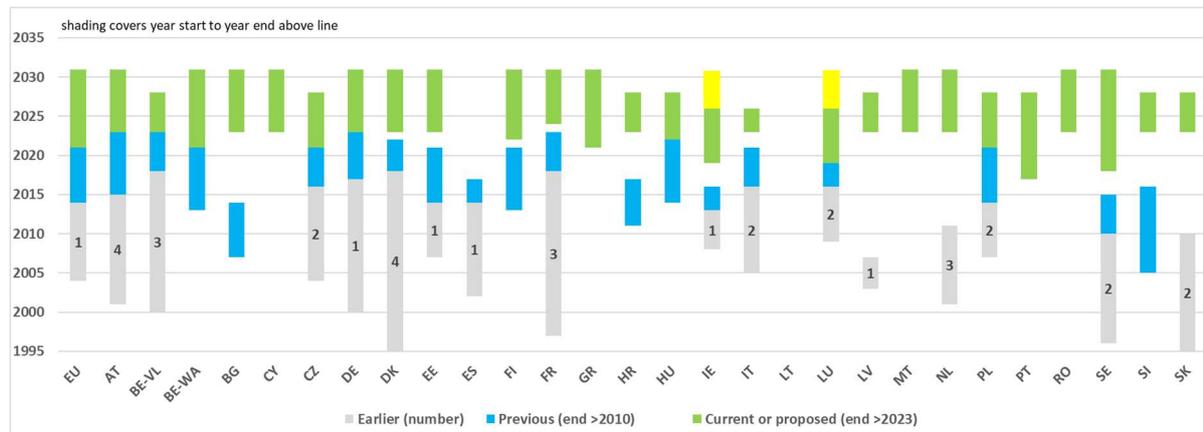
Source: Lampkin et al, 2024

### 10.1 Project results and policy contexts

#### 10.1.1 Project results

In Work Package 1 (Drivers and barriers, Lampkin et al. 2024), the scope of action plans implemented currently was compared with previous action plans to identify how far this approach has developed and what opportunities for improvement exist. By 2024, all EU MS except Spain and Lithuania had organic

action plans in place (Figure 10.1). Almost all of these had targets for land area shares, and many had market retail sales value or public procurement share targets.



**Figure 10.1: Periods covered by EU and national organic action plans since first introduced in 1995. Current (green)<sup>90</sup> and previous (blue) plans were analysed and compared in the project.**

Source: Lampkin et al. (2024) updated

The following policy areas typically found in organic action plans were identified.

- Production support: Conversion and maintenance payments, other agri-environmental support, investment aids
- Market support: Investment aids for processing, support for producer organisations, supply chain co-ordination, public procurement, gastronomy and agritourism, export initiatives, certification and implementation of EU regulations.
- Information support: consumer information, advice and mentoring, training and education, research and innovation, statistics and market data

In some cases, issues such as aquaculture, bio-districts and capacity development were also covered. A detailed synopsis of all the main action points in these action plans is included as an Annex in the Lampkin et al. (2024) report.

As part of Work Package 2 (Scenario analysis and backcasting), workshops were held in the project focus countries to explore what actions would need to be undertaken to reach the defined endpoints under different scenarios (Zanoli et al, 2026). Possible areas for development and improvement of action plans emerged from the backcasting workshops in five of the focus countries (IT, FR, DK, HU, DE). These national pathways highlight the importance of triggers, such as decisive public policy action, research and societal recognition of organic farming’s environmental and health benefits, and internal sector reorganisation to increase collective capacity and political influence. Across all countries, public policies emerge as essential levers for change. They target all part of the food system, but especially important are those that integrate agricultural, environmental, health, and food system objectives. System enablers, such as research & innovation, AKIS, market intelligence and stakeholder engagement emerge as important across all national pathways under different scenarios. In all countries except Hungary the need for higher funding for organic farming in the CAP is also highlighted (Zanoli et al. 2026). Specific actions raised in the workshops included:

- innovative tax policies and financing by the private sector, including water companies (DK, FR)
- stronger focus on plant-based and less on animal-based products, but higher quality (DK)

<sup>90</sup> The current plans for FR and GR and new plans (yellow) for IR and LU were not analysed in the original deliverable but have been integrated in the updated national organic sector factsheets available at: <https://organictargets.eu/organic-sector-factsheets/>

- environmental labelling based on measured impacts—sustainability benchmarking
- stronger links between producers, food businesses and consumers—contracts, co-operation (DE, FR)
- stronger support for organisational capacity building and organic sector unity (DE)
- more focus on generational renewal for long-term continuity (HU)
- easier access to land (IT, FR, DE)
- better integration of organic policies with food and nutrition policies
- stronger organic regulations with respect to soil health, biodiversity
- actions to reduce administrative burdens associated with certification and policy implementation.

In the final conference, participants reviewed the scenarios in the context of the policy recommendations in this report. With reference to agricultural policy and strategic options, stakeholders consistently prioritised cross-cutting system enablers, such as targeted research and innovation support (including clearer specification of organic priorities in Horizon Europe calls), improved data availability and market intelligence (e.g., observatories), stronger price transparency, and governance/coordination tools such as stakeholder engagement, peer-to-peer AKIS initiatives, and public–private partnerships. Measures such as Bio-districts, capacity-building centres, diversification of market channels, and actions to increase consumer accessibility were also widely supported, though these were slightly more scenario-sensitive (Zanoli et al., 2026).

Closely linked to this project, Rees et al. (2023) assessed the effectiveness of organic action plans as a policy tool to expand the area of organic farmland. They analysed the effect of four different national organic action plans in France (2008 to 2012), Sweden (2006 to 2010), Czechia (2011 to 2015) and Austria (2011 to 2013). The results indicated robust, large, positive and significant effects for the French and Swedish organic action plans on organic farmland area. However, the Czech and Austrian plans were found to be ineffectual. Whilst organic action plans appear useful agenda-setting tools, caution is advised in relying on them to produce consistent results, particularly if numerous plans have been previously implemented and the organic area share is already high. There may be decreasing marginal returns to action plans, suggesting that the need for a deeper understanding of the effectiveness of previously implemented plans is critical for the optimisation of future interventions.

### 10.1.2 Other related research

The EU-funded ORGAP project (2005-2008)<sup>91</sup>, which was commissioned to support the first (2004) EU organic plan, reviewed existing action plans at that time, and developed a manual for good practice in organic action plan development, as well as a toolbox (ORGAPET) for organic action plan evaluation. The Organic Action Plan manual was updated as part of the SME Organics project to include a stronger focus on supply chains (Meredith et al. 2018). The ORGAPET toolbox<sup>92</sup> drew heavily on the MEANS approach to EU policy evaluation implemented at the time. This work highlighted some key principles for organic action plan design:

- Undertake a thorough status quo analysis of the organic sector, involving key stakeholder groups, to identify relevant development needs and priorities.
- Stimulate participatory stakeholder involvement throughout the planning, implementation and evaluation phases, recognising that stakeholders can lead actions as well as benefit from them.
- Link the plan to the country or region’s overall strategies for stimulating wider economic and rural development and achieving environmental and other societal benefits.
- Define strategic objectives that are clear, measurable and prioritised to be achieved within a relevant timescale.

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<sup>91</sup> ORGAP Project: <https://www.orgap.org/> (accessed 19.02.26)

<sup>92</sup> Organic Action Plan Evaluation Toolbox (ORGAPET) <https://www.orgapet.orgap.org/> (accessed 19.02.26)

- Select actions that are well aligned with the plan's objectives and clearly address the needs of the organic sector in the country or region.
- Ensure a balance between 'supply-push' and 'demand-pull' actions which recognise the needs for high quality products and public goods from organic land management.
- Enable knowledge and information exchange to support a growing organic sector, particularly if there are many new entrants.
- Improve organic consumers' and citizens' access to and awareness and understanding of organic food and farming.
- Allocate sufficient financial and human resources to implement the plan, including specific funding from both private and public sources, that build on existing programmes.
- Integrate regular monitoring and evaluation from the outset.

Sanders et al. (2011) published a study commissioned by DG Agri in the EU Commission that evaluated the full range of policies for organic farming being implemented at that time, including organic action plans. They found that national or regional organic action plans provide a strategic instrument to coordinate different supply-push and demand-pull instruments tailored to local conditions. In total, 17 national and 10 regional action plans or similar support schemes were identified in EU Member States that have been implemented since 2007. In many cases, action plans bundle CAP measures and complementary national/regional measures not (co-) funded by the EU Funds. The action plans differ substantially with respect to the policy targets, running period, types of actions specified, financial resources, number of previous action plans, and initial year of implementation reflecting different support strategies and developmental stages of the EU's organic sectors. They concluded that:

- National action plans or similar organic policies demonstrate strategic thinking by setting targets for the development of the organic sector and defining action points to achieve those targets.
- In several countries, these action plans have been in place over a longer period and regular mechanisms to consult stakeholders are in place, although in some cases they are not well established, making them vulnerable to change of governments or key persons.
- Several of the national action plans do not carry a specific budget, and rely entirely on other funding streams (in particular the RDP) to reach the targets. There is also some evidence that rural development programmes do not fully take account of targets set in national organic action plans, suggesting a lack of integration between these two policy domains.
- National action plans should consider how the range of rural development measures (in particular the less widely targeted skills, market development and competitiveness measures as well as diversification measures) can be used to support the goals and reach the targets. Similarly, rural development programmes should consider the goals and targets of national action organic plans.
- A further weakness in terms of coherence relates to the absence of strategic thinking on how organic support contributes and relates to wider policy goals. There is sometimes a disconnect between policies for agriculture and the environment in general, and policies for the organic sector specifically, as if organic farming remains an isolated topic for some policy makers.

The European Court of Auditors (ECA) report on organic farming policy (ECA, 2024) also looked at the role of national organic action plans, noting that although the Commission encouraged Member States to develop national organic action plans, they had no legal obligation to do so, and the Commission does not systematically monitor the adoption of national action plans. (Anecdotal evidence gathered during the OrganicTargets4EU project suggests that there has been more direct engagement on action plans between the Commission and Member States as part of the negotiation and implementation of the CAP Strategic Plans than in previous programming periods). The ECA examined the action plans of four Member States, including two where the organic sector is currently under-developed. They reported that there was a lack of coherence between the national organic action plans and the respective Rural

Development and CAP Strategic plans. The ECA was critical that some plans were more paper exercises, lacking substance, relevant targets, clear roles and responsibilities and financial allocations.

### 10.1.3 Development needs and challenges

While it is clear that good quality organic action plans have significant potential to improve policy integration and coherence, there is still significant variation in quality and performance between Member States, and scope for improvements in design, scope and implementation. We focus on three key areas here:

#### Organic action plan design, implementation and evaluation

The organic action plans should not mimic EU-level plans designed for a different purpose but should focus specifically on the development needs of the organic sector in the specific country or region. This should build on the evaluation of previous action plans, a status quo analysis of the organic sector, stakeholder input and clear objective setting, including targets (see Chapter 2).

Stakeholder engagement is an important part of effective action planning. Some current national organic action plans show no evidence of stakeholder engagement, diminishing their relevance and effectiveness. The engagement of stakeholders is not only relevant for development but also for the implementation of action plans, as relevant stakeholders could take on responsibility (ownership) for the delivery of specific actions. Stakeholder advisory groups can also play a role in regularly reviewing progress (more than once a year) and helping focus implementation work.

Ensuring sufficient resources are available to enable plans to progress is also relevant. While it is possible for some actions to be progressed using other funding streams, the core elements, including the co-ordination teams and procedures, need committed funding. There is evidence that countries with no core funding for their action plans fail to make good progress with implementation.

Effective monitoring and evaluation frameworks are also important. These are relevant both to assess what an action plan has delivered on completion and to assess progress being made during implementation. This will allow mid-term reviews to be undertaken to adjust priorities and actions if needed, particularly if external shocks, like the food price inflation following the invasion of Ukraine, have substantially altered the context for the plan. A monitoring and evaluation process needs to be established from the outset, to ensure that relevant data is available and initial starting points can be recorded.

Opportunities exist to adapt and improve existing plans, or develop new plans:

- Immediately for countries with no action plans, or with plans ending in the near future, or with organic sectors that are stalling and the current policy framework is not turning the situation round
- In the medium term for countries, and at EU-level, with plans linked to current CAP ending in 2027—new plans could be linked to next CAP period 2028-2034
- In the longer term for countries with plans extending to 2030, with mid-term reviews soon to adapt the plans to meet changing needs

This work could be supported by exchanging best practice examples and guidelines between Member States, a process that could be facilitated by the EU CAP Network and reference to the manuals and evaluation tools from the ORGAP project (see above).

#### Capacity building

In many cases, there has been a focus on individual projects or time-limited actions, either directly or as the basis for programmes such as research. A recurring theme in the OrganicTargets4EU project, in particular in the stakeholder workshops, has been the need to go further, to strengthen both organic sector organisations and the organic presence in public institutions on a long-term basis. However, with

some exceptions, organic action plans have tended not to provide the required long-term commitments, or even a focus on capacity development as such. There is scope to improve organic action plans by including a specific focus on capacity building.

We found many good examples of capacity development in several countries:

- organic movement organisations (producer-focused or multi-stakeholder), such as Bio-Austria (AT)<sup>93</sup>, Soil Association (UK)<sup>94</sup>, Organic Denmark (DK)<sup>95</sup>
- specialist research institutes, such as FiBL (CH)<sup>96</sup>, Thünen Institute of Organic Farming (DE)<sup>97</sup>, ÖMKI (HU)<sup>98</sup> and ITAB (FR)<sup>99</sup>
- scientific knowledge and innovation centres such as ICOEL (DK)<sup>100</sup>
- dedicated university Chairs or Departments, such as ICROFS (DK)<sup>101</sup> and Kassel University (DE)<sup>102</sup>
- competence centres, such as Interbio Nouvelle Aquitaine (FR)<sup>103</sup> or Kompetenzzentrum Ökolandbau Niedersachsen<sup>104</sup> and FiBL (DE)<sup>105</sup>
- online information platforms, such as Agricology (UK)<sup>106</sup>, Organic Farm Knowledge (EU)<sup>107</sup>, oekolandbau.de (DE)<sup>108</sup>
- market observatories, such as Agence Bio (FR)<sup>109</sup>, AMI (DE)<sup>110</sup>
- producer marketing organisations/co-operatives (many examples).

These organisational structures permit multi-disciplinary/multi-stakeholder engagement and innovation, build institutional expertise and enable career development. They go beyond what is possible with project funding alone. Organic movement organisations are important players in many countries, covering many of the areas identified, but capacities can be stretched as the sector grows to mainstream, with potentially millions of actors involved EU-wide.

There is no specific evidence from this project on the potential role of these organisations, but their importance is clearly demonstrated by experiences in FR, DE, DK and elsewhere. The Delphi survey of value chains (Cisowski and Serre 2024) identified the following development needs:

- Develop regional platforms to facilitate cooperation between producers, processors, distributors and regional authorities.

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<sup>93</sup> Bio-Austria <https://www.bio-austria.at/> (accessed 19.02.26)

<sup>94</sup> Soil Association <https://www.soilassociation.org/> (accessed 19.02.26)

<sup>95</sup> Organic Denmark <https://organicdenmark.com/> (accessed 19.02.26)

<sup>96</sup> Research Institute of Organic Agriculture (FiBL) <https://www.fibl.org/en/locations/switzerland> (accessed 19.02.26)

<sup>97</sup> Thünen Institute of Organic Farming <https://www.thuenen.de/en/institutes/organic-farming> (accessed 19.02.26)

<sup>98</sup> Hungarian Research Institute of Organic Agriculture (ÖMKI) <https://biokutatas.hu/en/> (accessed 19.02.26)

<sup>99</sup> Institut de l'agriculture et de l'alimentation biologiques (ITAB) <https://itab.bio/en> (accessed 19.02.26)

<sup>100</sup> Innovation Centre for Organic Farming (ICOEL) <https://icoel.dk/en/> (accessed 19.02.26)

<sup>101</sup> International Centre for Research in Organic Food Systems (ICROFS) <https://icrofs.dk/en/> (accessed 19.02.26)

<sup>102</sup> Faculty of Organic Agricultural Sciences, Uni. Kassel <https://www.uni-kassel.de/fb11agr/en/index.html> (> 19.02.26)

<sup>103</sup> Interbio Nouvelle Aquitaine <https://interbionouvelleaquitaine.com/> (accessed 19.02.26)

<sup>104</sup> Kompetenzzentrum Ökolandbau Niedersachsen (KÖN) <https://www.oeko-komp.de/> (accessed 19.02.26)

<sup>105</sup> FiBL Deutschland <https://www.fibl.org/de/standorte/deutschland> (accessed 19.02.26)

<sup>106</sup> Agricology <https://agricology.co.uk/> (accessed 19.02.26)

<sup>107</sup> Organic Farm Knowledge (accessed 19.02.26)

<sup>108</sup> Oekolandbau.de <https://www.oekolandbau.de/> (accessed 19.02.26)

<sup>109</sup> AgenceBio <https://www.agencebio.org/> (accessed 19.02.26)

<sup>110</sup> AMI Biomarkt <https://www.ami-informiert.de/ami-maerkte/maerkte/ami-maerkte-oekolandbau/meldungen> (> 19.02.26)

- Promote membership and engagement in organic interprofessional organisations: the more actors in the value chain that are involved, the closer the collaboration between them, leading 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: professionalisation 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 digitalisation of farms.

Up to a certain level of development there is a need for a clear focus on defined organic food and farming systems, to avoid de-prioritisation and confusion with competing/less well-defined approaches such as regenerative agriculture. Beyond that level, integration with existing institutions serving agriculture in general may be feasible and even necessary, providing sufficient prioritisation and resources are available. There is insufficient research to specify what level this is, but from 10% of land area may be a relevant starting point, with integration into mainstream institutions likely to be essential once organic shares exceed 25%.

There is a need to ensure that long-term resources for organic institutional/capacity development are available. Opportunities to address this include CAP CMO funding for producer organisations and operational groups as well as national government funding for research, education, training, advisory, market and other organisations. The Horizon Europe research programme's shift towards R&I funding primarily for agroecology transition is an example where institutional capacity building would be needed to maintain the existing organic capacities and build on selected relevant sustainable agriculture models. Further examples of capacity building needs are considered in other Chapters in this report.

### Bio districts

Bio-districts<sup>111</sup> and bio-cities<sup>112</sup> are increasingly popular in countries like Italy, the Netherlands and Germany. They are localised geographical areas where farmers, citizens, tourist operators, associations, and public authorities enter into an agreement for the sustainable management of local resources, based on organic production and consumption. This includes different aspects such as the development of short food chains, the establishment of organic canteens in public offices and schools. In bio-districts, the promotion of organic products is inextricably linked with the promotion of the land and its special characteristics so that it can fully realize its economic, social, and cultural potential. Such agreements have many parallels with national organic action plans and are often promoted as part of them. The 2021 EU Organic Action Plan also highlighted their potential. A stronger focus on bio-districts could be relevant for many national organic action plans.

### 10.1.4 Specific policy context for action plans

National and regional organic action plans need to be embedded in broader frameworks for agricultural support, to reinforce policy coherence and integration. All the chapters in this report contain relevant considerations relating to development needs, policy options and specific policy contexts that could be relevant to action plan development. In particular, the integration with CAP planning is relevant, with some general considerations relating to the current CAP (2023-2027) and the proposed future CAP (2028-2034) set out in Chapter 1. In previous programming periods, the integration of organic action plans with Rural Development Plans, for example as RDP chapters, was very limited or non-existent.

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<sup>111</sup> Frontiers in Sustainable Food Systems Research Topic Biodistricts <https://www.frontiersin.org/research-topics/48371/biodistricts-a-concrete-example-of-sustainable-food-systems/magazine> (accessed 19.02.26)

<sup>112</sup> Citta del Bio network <https://www.cittadelbio.it/> (accessed 19.02.26)

The current CAP Strategic Plans represent a significant step forward, with all national CAP Strategic plans containing specific sections relating to organic conversion and maintenance payments and some referring to other forms of support. Organic action plans have still tended to be developed in parallel, often covering different time periods, and there could be merit in achieving further integration in the next programming period.

The EU Organic Action Plans have the potential to provide a supportive framework for the development of national organic policies and action plans. The first two (2004<sup>113</sup> and 2014<sup>114</sup>), although they recommended Member States (MS) to consider how organic farming support could be integrated in their Rural Development Plans, were more focused on actions that could be undertaken directly by the Commission itself, including the revision of the EU organic regulations. With the current CAP Strategic Plans and the proposals for the next CAP allocating more responsibility to MS to determine their own policies to meet the overarching CAP goals, the role of the EU organic action plan became more significant as a basis for providing guidance and encouragement to MS. The third EU Organic Action Plan from 2021<sup>115</sup> encouraged MS to implement conversion and maintenance support in their CAP Strategic Plans and to develop national organic action plans, with almost all MS responding positively. (For further information on the current EU Organic Action Plan see Chapter 1.) The Commission has identified the need to update the current action plan in 2026 as a basis for guidance to MS on organic policy in preparation for the next CAP from 2028.

## 10.2 National perspectives

As part of the national policy workshops undertaken in WP7, participants were presented with some key findings from the project results for each theme, with associated development needs and policy challenges and options identified, as well as national perspectives prepared by the workshop organisers drawing on local knowledge and documentation including national support programmes and organic action plans. Development needs identified in earlier national workshops in the project could also be integrated. In this section, we summarise the key outcomes for each topic from the national workshops, based on the documentation provided by the workshop organisers.

### 10.2.1 Austria

The themes of organic action plans and capacity building were not separately discussed in the Austrian workshop, in part reflecting previous activities in this context.

### 10.2.2 Denmark

The themes of organic action plans and capacity building were not separately discussed in the Austrian workshop, in part reflecting previous activities in this context. As identified above, Organic Denmark (organic sector), ICROFS (research) and ICOEL (innovation and advice) are key examples of advanced capacity development. Key roles are also played by public authorities like Statistics Denmark (market data) and the State operated organic certification system.

### 10.2.3 France

The French workshop highlighted the first organic action plan in France already in 1997 (Plan Riquois), and the importance of balancing demand and supply as well as public goods and markets, requiring the involvement of different Ministries. Organic farming is a means to an end in this context. A further issue is balancing EU-level regulations and national priorities. Policies need to address the difficult market circumstances, including challenges due to high level of organic self-sufficiency in France. It is

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<sup>113</sup> EU Organic Action Plan 2004 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52004DC0415>

<sup>114</sup> EU Organic Action Plan 2014 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A52014DC0179>

<sup>115</sup> EU Organic Action Plan 2021 [https://agriculture.ec.europa.eu/farming/organic-farming/organic-action-plan\\_en](https://agriculture.ec.europa.eu/farming/organic-farming/organic-action-plan_en)

also important to consider new entrants and organic farming's relevance to the agricultural demographic crisis.

### 10.2.4 Germany

The Bio-Strategie 2030 (BMEL 2023) published in November 2023 sets out 30 measures to achieve the target of 30% organic land area by 2030. It was developed through various consultations under the previous coalition government (Social Democrats, Greens and Free Democrats). The measures include research, education, organic farming, demand, standards for communal catering, and reducing barriers. The coalition agreement of the current government of 2025 (Christian Democratic Union, Christian Social Union and Social Democrats) considers organic farming an important element of a more sustainable and climate friendly agriculture but also emphasises the equality of conventional and organic agriculture. An evaluation of the organic strategy is ongoing with results expected in 2026. The 30% goal has been confirmed by the current government in its sustainability strategy. The workshop participants did not consider achieving the target of 30% by 2030 realistic, but a target was seen as helpful to express ambition, and adequate resourcing is necessary.

Concerning capacity building, several of the examples given above come from the Germany situation, where there has been long term development of organic organisations, research institutes, University chairs, competence centres, a dedicated research programme (BÖL), internet platforms (oekolandbau.de) and market observatories (AMI). However, not all areas are equally well developed and some scope for improvement remains. While the provision of public goods by the organic sector would justify this kind of support, there are legal restrictions on programmes such as the Bundesprogramm Ökologischer Landbau (BÖL), and resource limitations in the agricultural Ministry (BMLEH) that limit capacity to act. FiBL DE works to network and co-ordinate advisory developments, but without long-term funding commitments. The knowledge capital contained within the organic sector needs to be recognised and developed. In particular, there is a need for further development in agricultural colleges and in market observatories going beyond the existing activities of AMI, KTBL, Thünen Institute and competence centres. Central, multi-functional contact points in each of the federal states (Länder) could be helpful. Organisational capacity development is also needed to make the case for public goods, but it was not resolved how this could be best achieved. Longer term funding agreements are needed to support institutional development. Commercial opportunities to valorise and exploit the sectors knowledge capital could be explored further.

### 10.2.5 Hungary

Hungary has an organic action plan. It was written based on available data and contains specific objectives. The results of the action plan for the previous period (2014-2019) were not fully known among workshop participants: of the five quantified targets, only the one relating to territorial growth was almost achieved. The other targets may have been unrealistic (targets for animal product processing, beekeeping and public catering). There are no specific calls for proposals for the implementation of programmes related to the Eco Action Plan.

Workshop participants highlighted that the implementation of the Eco Action Plan needs to be monitored and that those responsible for the action plan should take their tasks more seriously. They did not see the resources necessary for the implementation of the Eco Action Plan in the budget of the Ministry of Agriculture. The competent authority, Nébih, is clearly struggling with a lack of resources, which is also hindering the implementation of its action plan.

There are no designated bio-districts in Hungary yet, although there are areas that would be suitable based on the density of producers. Based on foreign examples, workshop participants considered this as feasible, possibly in conjunction with regional certification.

Apart from the national project partner ÖMKI, no Hungarian institutional organic capacities were identified prior to the workshop. Some of the new universities might be relevant but these have problems with accessing Horizon funding. There are new emerging groups related to market-gardening. Primary responsibility for capacity development was mainly assigned to the Ministry of Agriculture, as it has the necessary resources. The Hungarian support system completely lacks support for organic animal husbandry, and support for processors is very limited (in practice, only the introduction of a quality system can be applied for, at a rate of €1,000 per year). There is a lack of training for processors and traders, as well as marketing for processors and traders. There is a need for developing regulatory and certification capacities. EU Regulation 848/2018 does not allow the approval of private certification scheme by the competent authority; private certification schemes are accepted by the national intellectual property office. The same regulation is not entirely clear as to what specific information the description of the economic operator should contain, e.g., organisational structure, product manufacturing method, process flow chart, cleaning procedures and material storage records.

The 2017 regulation describing the tasks of the competent authority states that the financing of delegated official tasks is the responsibility of the Member States, but this does not work. The competent authority has serious capacity shortages. Bureaucracy should be replaced by support for good digitalisation. Legislation on organic products for use in public catering is needed. Rules and accreditation for group inspections as defined in the organic regulation need to be prepared. Some other specific issues relating to organic certification in Hungary were also raised including support payments for non-productive, certified apple orchards and conversion of livestock enterprises.

In the next CAP period between 2028 and 2034, adequate resources should be allocated to the action plan, with an indicator of 2% share. It would be necessary to analyse the implementation of the current plan, including why it has not been implemented.

### 10.2.6 Italy

The national Action Plan in Italy has three main Axes: i) Promotion and Communication; ii) Production Development and iii) Research and Innovation, encompassing 12 strategic objectives. There is also one cross-cutting Axis (Action 8.1—Integration between information sources. The actions are summarised in Lampkin et al. (2024). Each action is detailed with the specific activities planned, providing a complete overview of the initiatives planned for the development of the Italian organic sector, with the aim of reaching 25% of agricultural area (UAA) organic by 2027.

The following development needs were identified:

- increased stakeholder engagement in action plan development, implementation and review
- stronger recognition of environmental and health benefits
- environmental labelling based on measured impacts—sustainability benchmarking
- stronger links between producers, food businesses and consumers—contracts, co-operation
- stronger support for organisational capacity building and organic sector unity
- more focus on generational renewal for long-term continuity
- better integration of organic policies with food and nutrition policies
- stronger organic regulations with respect to soil health, biodiversity
- actions to reduce administrative burdens associated with certification and policy implementation

In addition, the discussion highlighted some policy opportunities, a clear definition of implementing actions, commitment (ring-fencing) of dedicated resources, an effective monitoring and evaluation framework (including mid-term reviews to adjust priorities and actions). A new national organic action plan could be linked to next CAP period 2028-2034.

## 10.2.7 Romania

The following major challenges of the current Romanian organic sector were identified:

- Higher prices compared to conventional products, which discourage purchases.
- Fragmentation of the value chain
- Insufficiently developed cooperatives, difficulties in aggregating production.
- Limited local processing, which affects the added value.
- Lack of education and specialized consultancy.
- Few public programmes dedicated to training in organic agriculture.
- Lack of certified advisors in ecological practices and knowledge transfer.
- Insufficient data and monitoring.
- Limited information on consumer behaviour and the impact of the measures.
- Challenges in tracking land conversion and maintaining certifications.
- Infrastructure and market access.
- Underdeveloped ecological transport and storage.
- Difficulties in accessing foreign markets for small producers.
- Resistance to change—reluctance on the part of traditional farmers to adopt organic practices.
- Need for personalised support during the conversion period.

To some extent the Romanian organic action plan (OAP) should be correlated with the CAP Strategic Plan 2023–2027, at least in documents. The OAP has set a more modest target, but the funding for conversion and maintenance comes from the CAP Strategic plan. Joint interventions also include eco-scheme combinations with organic farming, priority for investments in processing and marketing, and additional support for young farmers who adopt organic farming, but many important interventions are delayed. The individual actions are summarised in Lampkin et al. (2024).

The following limitations to the action plan were identified:

- Insufficient funding: The plan has insufficient implementation tools and financial instruments. Although European funds are allocated through the EAGF and EAFRD, some small and medium-sized farms have difficulties in accessing them.
- Complex bureaucracy: The application process for grants can be cumbersome and difficult for farmers.
- Slow adoption of organic practices: Although there are support schemes for organic farming, the transition to sustainable methods is still a slow process.
- Limited market: Organic products are not yet in sufficient demand on the domestic market, which affects farmers' profitability.

The RO workshop identified that organic capacity development is focused on strengthening knowledge, skills, and advisory networks to support sustainable organic farming. In Romania, Inter-Bio is actively involved in this effort through the EU-funded OrganicAdviceNetwork project (see Chapter 6). The need to connect the Romanian network with other international initiatives was also identified, for example:

- IFOAM's Sustainable Food Systems Project, focused on organic agriculture training and policy advocacy.
- FAO's Global Soil Partnership, providing technical manuals, workshops, and digital tools for soil health and organic farming.

## 10.3 European perspectives

### 10.3.1 EU Commission interviews, Autumn 2025

Interviews were conducted in September and October 2025 with representatives from different units within the European Commission covering the different themes in this report. For this topic, a discussion was held with representatives from DG AGRI B2 (Environmental sustainability) and separately B4 (Organic).

As an overall impression, it was felt that the dual nature of organic farming (delivering both public and market goods) was not always well reflected in national organic action plans. Concerns about whether action plans were merely paper exercises, lacking resources for implementation, as identified by ECA (2024), were also shared in the Commission. A challenge with getting better integration with the CAP Strategic Plans is that only some of the action plan measures are covered in the CAP SPs. The possibility of using the EU CAP Network to help exchange and guide good practices would be worth looking at.

Stakeholder consultations or engagement were also not well established in all member states, particularly where the organic sector lacked capacity for policy engagement or may be represented by general farming organisations that do not have a clear understanding of and focus on organic needs. This is not only an issue for organic action plans, it also impacts on discussions about the CAP, organic regulations and other matters, both within countries and with the Commission. There is a need, somehow, to enable organic stakeholders to gain a stronger voice. Capacity building with respect to information comes within the remit of AKIS and research, and there is a role for the EU CAP Network to support this.

### 10.3.2 Organic Summit, Copenhagen, August 2025

The Organic Summit<sup>116</sup> was held as part of the Danish Presidency of the European Union and brought together organic sector stakeholders and policymakers from many countries. Many of the themes and policy recommendations discussed during this conference, including those featured in the Conference Charter and the Session summaries, are relevant to the work in the OrganicTargets4EU project (Anon, 2025). One session in particular focused on national and regional policies, including organic action plans and capacity building.

A key conclusion was that, across countries, organic farming proves most successful when policies, market initiatives, and sector capacity align, embedding organic into broader agendas like climate, employment, and welfare. Evidence from Canada, Denmark, the Netherlands, and Tanzania shows that supportive policies and market partnerships not only grow organic acreage but also deliver major returns in profitability, climate resilience, and public health. The key to scaling globally is to frame organic as a solution to wider societal challenges, backed by clear targets, resources, and inclusive governance that can withstand political shifts. Denmark's example shows how embedding organic into broader agendas and creating active action plans can deliver systemic change, supported by public procurement goals, national cuisine labels, and retail partnerships. Organic should be framed as a solution to wider societal goals, with meaningful targets, resources and stakeholder engagement.

### 10.3.3 Final OrganicTargets4EU project conference, Brussels, November 2025

At the final conference of the OrganicTargets4EU project, an international audience of stakeholders and policymakers heard about some of the results of the project and a summarised version of the

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<sup>116</sup> <https://organicsummit.org/>

emerging policy recommendations. In a World Café exercise, participants had the opportunity to reflect on the policy recommendation and to identify specific priorities and additional considerations.

Participants in the discussion considered that organic action plans should be better integrated in future CAP plans, and that the Commission should require them to be of an appropriate standard including monitoring and evaluation procedures. The plans and related policies needed to continue to have a specific organic identity, avoiding dilution with less ambitious approaches. Initiatives to encourage best practice in national and regional organic action plans could also be supported by a mobile policy development team, potentially linked to IFOAM.

Target setting should take care to avoid damaging competition with other regions, and actions should be more directly linked to specified targets. Stakeholder engagement should include identifying a shared vision, buy-in, and willingness to take on responsibilities. A good stakeholder platform, including organic and non-organic participants, should be able to evaluate and provide feedback to the administrators, who would likely be based in Ministries to ensure policy focus.

Action plans should support longer-term capacity building initiatives, including learning networks and peer-to-peer communities of practice, as well as local solutions including bio-districts.

Discussions around capacity building focused on research capacities specifically, where it was considered that it was important to have research institutes focused on organic, but also to continue to work with conventional actors. At some point, the mainstream institutions will want to integrate organic, but before then the organic institutions need to get bigger. Positive organic research results are sometimes perceived as a threat but researchers not in dedicated to organic research institutions may just go where the resources are. Research facilities, including research farmers, real farm experiments, living labs, laboratories are also relevant. Changes in government funding priorities, for institutions as well as research programmes, may also be a threat for capacity development.

A strong case was made for a focus on organic sector organisations to be maintained. They are rooted in the organic movement, have a good understanding of the sector, and investment in their capacities, for technical and market information and for policy engagement would be valuable. This can help ensure that the data and information are relevant to sector needs, not following a top-down agenda.

Linkage to producer groups and to civil society organisations should be developed. Capacity building for municipalities and local authorities is also relevant for the development of bio-districts.

It is important, however, to identify the specific gaps and development needs before investing in capacity development.

## 10.4 Policy recommendations

Organic action plans including capacity building and bio-districts have proven value in the organic policy context. They should continue to be encouraged as a means of integrating supply-push and demand-pull policies, as well as public good and market-oriented policies, consistent with the multi-functional, system approach of organic food and farming. There is a need to improve and broaden their scope and implementation.

As an overall aim, organic action plans at EU, national, regional and local level (bio-districts and cities) should be reviewed, strengthened and extended to a timeframe at least encompassing the end of the next CAP programming period (2034). Close integration with the National and Regional Partnership Plans for 2028-2034 is highly desirable.

**The EU Commission should review and strengthen the current EU Organic Action Plan in the context of the proposals for the next CAP, by:**

- conducting an evaluation of the outcomes so far, to see what lessons can be learned for the next phase;
- identifying actions that would support improved policy implementation by, and co-ordination between, Member States, for example co-ordination between national organic research funders;
- conducting a representative European survey of farmers to establish how important the identified factors influencing willingness to convert are for specific groups (interested in-conversion, in conversion, or part-organic) at present;
- conducting a survey of value chain actors to inform priorities for a future action plan;

**The EU Commission should support Member States in improving the quality, scope, implementation and evaluation of national organic action plans, by:**

- assessing how well national OAPs are integrated with CAP Strategic plans and other policies;
- establishing a network for sharing best practice examples and guidance between MS, supported by the EU CAP Network and organic policy experts;
- encouraging capacity building, using existing initiatives for producer groups, farm advisory services, EIP operational groups and extending these to cover other areas;
- exploring options for an EU-level organic market observatory.
- encouraging networks of relevant institutions and organisations to share best practice and co-operate in different fields, supported through other funding mechanisms where feasible.

**Member States should review and strengthen their national/regional action plans, including bio-districts/cities, with a 2034/2035 horizon, by:**

- ensuring coherence and integration with NRP and CAP plans for 2028-34;
- defining meaningful production, market and environmental targets (see Chapter 2), based on evaluation of previous action plans, status quo analysis of the current organic sector, and clear definition of sector development needs, including opportunities for generational renewal and administrative simplification;
- integrating institutional (public and organic sector) capacity building elements, with resources to ensure long-term delivery of organic-specific initiatives such as market observatories, AKIS and research networks, online-platforms and centres of excellence;
- identifying clearly responsibility for the implementation (ownership) of individual actions;
- including private sector involvement in delivery (public/private partnerships including organic organisations and businesses), for example market data companies, universities, charities;
- committing resources (financial and staff-time) to the core elements and co-ordination of the action plans (individual actions can be funded from other programmes);
- engaging stakeholders at all stages (design, implementation and evaluation), including support for organic organisations to develop policy engagement capacity;
- ensuring processes for monitoring and evaluation, including relevant indicators and data sources, are included from the outset.

## 11 Conclusions

The OrganicTargets4EU project was set up in support of the EU Farm to Fork and Biodiversity Strategies' aim to reach 25% of agricultural land (UAA) under organic farming and a significant increase in organic aquaculture by 2030. The project analysed production, market development, knowledge systems and socio-economic and environmental impacts under different scenarios, shaped by policy support, market pull, and citizen action.

The policy environment for organic farming at European level was historically influenced by agri-environmental support for organic conversion and maintenance introduced in 1994 through Regulation (EEC) 2078/92) and the EU organic regulation (EEC 2092/91). These provided both a legislative basis for organic market development and policy support, and financial support for the sector. The first EU Organic Action Plan followed in 2004, the second one in 2014. In the last decade, the EU's Green Deal (EC 2019), the Farm to Fork (EC 2020a) and Biodiversity (EC 2020b) Strategies set key targets for environmental issues, including the target of 25% organic share of EU UAA by 2030. A third European Action Plan followed in 2021. In December 2025, the Commission set out its Roadmap for the future of organic regulation and the further development of the current EU Organic Action Plan<sup>117</sup>.

In the CAP period 2023 to 2027, Member States were responsible for developing their own policy programmes for agriculture in Strategic Plans, which included setting out policies for organic farming guided by the Green Deal Strategy targets and the 2021 EU Organic Action Plan. As a consequence, all MS implemented support payments for organic land management and all but two implemented national action plans, with relevant land area targets either in the CAP strategic plans or OAPs. In 2025, the Commission has set out its Vision for Agriculture and Food and the Multi-annual financial framework (MFF), which includes proposals for a future CAP as part of the new National and Regional Partnership Plans (NRPP). Together, they provide many opportunities to support a dynamic development of the organic sector.

The policy recommendations were developed in the context of current and planned EU policy directions, using the project results and engagement with stakeholders at national and European level. In summary, our main conclusions are as follows. During the national workshops, the highest priority was placed on area support, consumer demand and research and innovation, with capacity building, advice, supply chains and training and education ranked as intermediate, and lowest priority, also reflect lack of discussion, allocated to statistics and market data, and organic action plans.

### **Focus on integrated long-term strategies for reaching ambitious targets**

Ambitious targets have a strong sign-posting and motivational role, and the 25% target has clearly had positive impact on the sector development in the CAP period 2023-2027. However, targets should also be realistic, achievable and adequately resourced. Our work shows that good progress is being made towards the 25% target and that 15-18% is achievable by 2030; 25% may take 5-10 years longer to achieve.

### **Making organic area support an environmental priority for all in the CAP**

The EU Commission can provide encouragement and guidance to national governments to continue with and enhance organic support in the 2023-2027 CAP Strategic Plans, adapting payments to help turn the organic sector round following the post-pandemic/Ukraine invasion market slowdown. Further development should focus on rewarding environmental outcomes, whilst considering impacts on the organic market and supporting the next generation of farmers to go organic. Member states should

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<sup>117</sup> [https://agriculture.ec.europa.eu/media/news/organic-rulebook-fit-future-2025-12-17\\_en](https://agriculture.ec.europa.eu/media/news/organic-rulebook-fit-future-2025-12-17_en) (accessed 24.

prepare ambitious plans for the transformative development of the sector in the 2028-2034 programming period.

### **Strategic development of consumer demand and organic supply chains**

Organic supply chains include diverse routes to market (retailers, public canteens, gastronomy, agritourism, direct sales and exports), reaching different consumers in line with organic values and principles. For consumers, organic should become the easy default choice for everyday shopping—visible, trusted, and affordable. Supporting the development of organic processing and marketing infrastructure can strengthen transparency and efficiency. Public procurement can help grow the demand for organic food through citizen engagement.

### **Strengthening organic in AKIS: for better advice, training, and knowledge exchange**

Member States should strengthen AKIS for organic, to reduce risks and support innovation making use of CAP instruments, recognising the important role that organic organisations play. The aim should be easy access to advice on organic for farmers, training for advisors and value chain actors, and building peer-to-peer networks, cross border exchanges and digital knowledge hubs.

### **Investing in organic research and innovation specific to the organic sector**

Funders should ringfence budgets for research and innovation specific to organic sector needs, and proportional to growth targets, and develop specific capacity for knowledge sharing. This is a strategic investment supporting the transition of Europe's agri-food systems and delivers solutions to improve farm profitability, reduce input dependency, regenerate natural capital, and develop value chains.

### **Statistics and market data are critical for supporting growth**

With the organic sector approaching 20-25% of EU agriculture, there should be an organic equivalent for all agricultural and food statistics. We recommend adjusting the legal framework to improve organic data collection and reporting, and to make use of opportunities through digitalisation with appropriate governance and data protection to improve data sharing between operators, public authorities and organic control bodies.

### **Strengthening organic aquaculture in Europe**

Organic aquaculture is still at an early stage of development in many countries, and its situation is fragile. We recommend that support for organic aquaculture should be developed to a similar status and importance for EU sustainability outcomes as organic farming. For this, similar instruments are needed, including regulatory adaptation and support for aquaculture producers, supply chain development, consumer information and investment in research, advice and knowledge exchange.

### **Organic action plans, capacity building and bio-districts**

A well-functioning organic sector requires coordinated action involving direct support, markets, and knowledge systems. To continue supporting the development of the organic sector, policymakers in the EU and in Member States should focus on integrated, long-term strategies with clear milestones, resources and capacity building, through organic action plans. These should integrate public and market good policies, supply-push and demand-pull policies, and ensure coherence with broader policy frameworks. We include recommendations relating to the improvement of action plan scope, implementation and evaluation. The same principles also apply at regional level, for example in developing bio-districts.

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## Deliverable D7.1

### Policy recommendations for the delivery of the organic Farm to Fork Strategy targets by 2030 and beyond

Zanoli, R., Gambelli, D., Vairo, D., Mora, O., & Schultz, E. (2026). Scenarios for the development of the organic sector (OrganicTargets4EU D 2.1) [Deliverable]. IFOAM Organics Europe. <https://orgprints.org/id/eprint/56760>



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## Partners



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