

# Organic Farming in perspective



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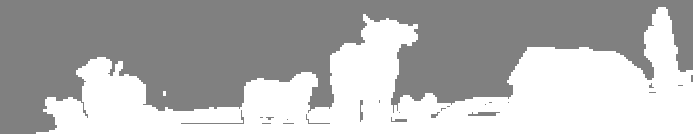


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# Organic...

- What is it today ?
- Trends
- Is it CAP-supported ?
- Demand drivers
- CAP post 2013
- Perspectives



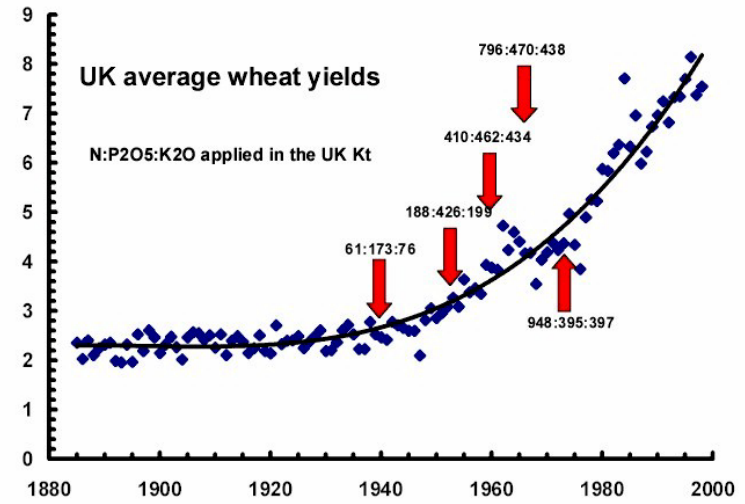
# What is organic farming ?



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# Conventional farming direct use of (chemical) nutrients

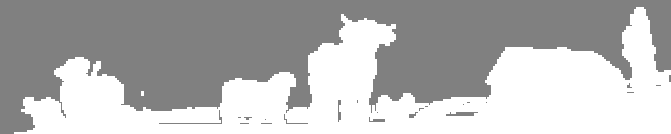


Data derived from MAFF and Cooke (1977)

MPC Research 2001



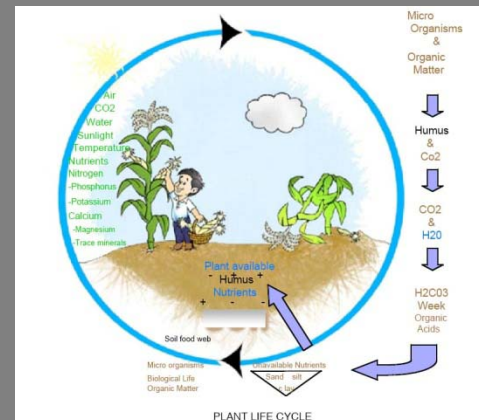
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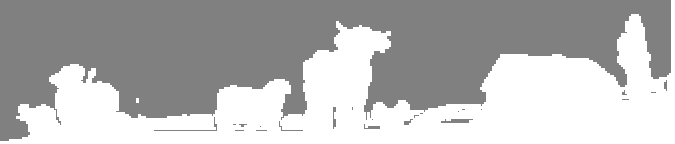


# Organic farming is...

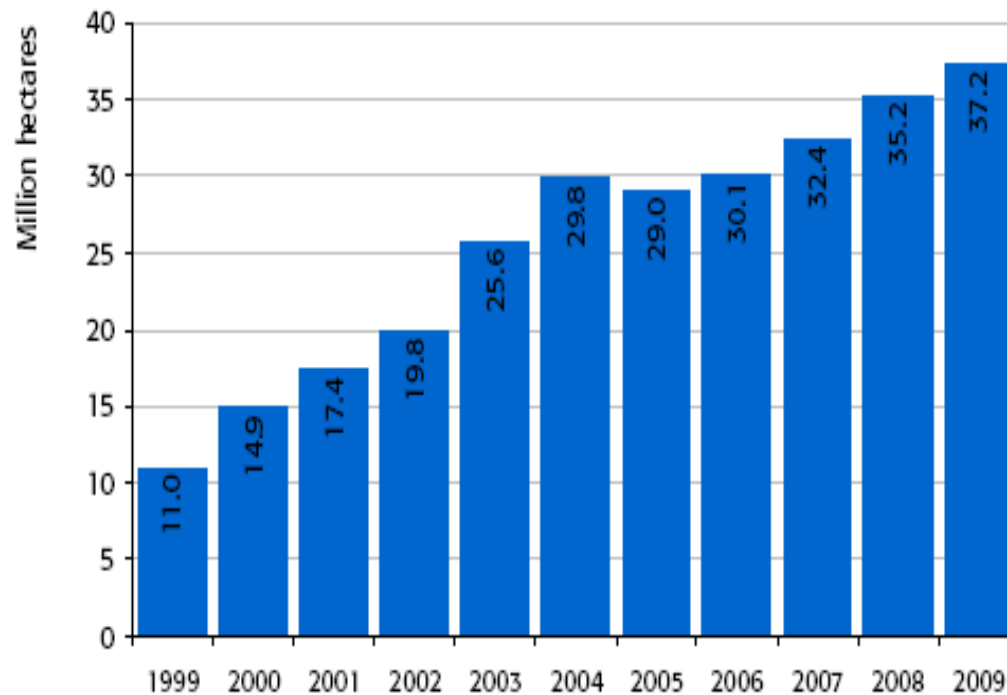
- Based on soil life (humus)
- Non-linear
- Regulated



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# Organic land worldwide



## Distribution by Region

- Oceania: 33%
- Europe: 25%
- Latin America: 23%
- Asia: 9%
- North America : 7%
- Africa: 3%

**2009: 37.2 mio ha**  
(+ 6% compared to 2008)

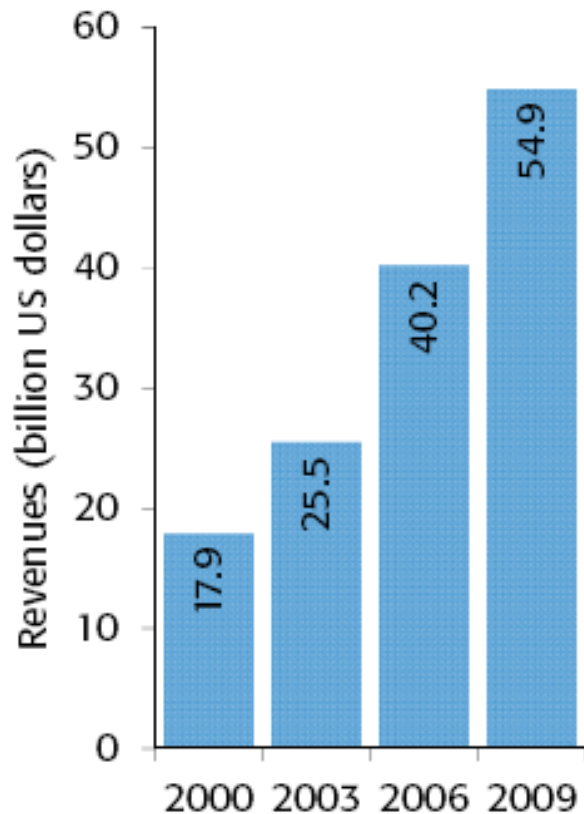


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Source: FiBL/IFOAM 2011



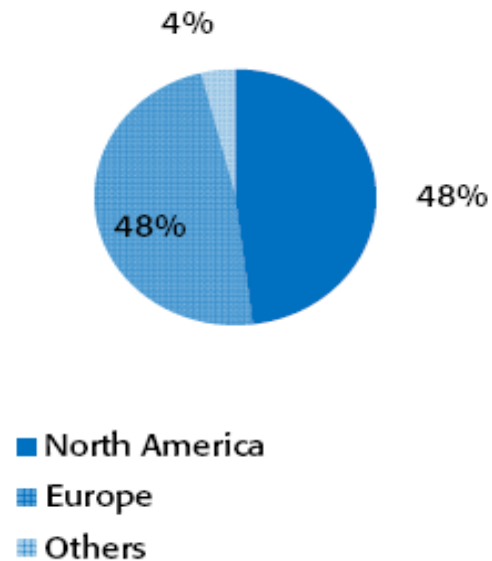
# Organic market worldwide



**2009: 40 billion €**

(+/- 5% compared to 2008)

(US dollar = 0.71895 Euros, average 2009 exchange rate)



Source: The Global Market for Organic Food & Drink (Organic Monitor 2011)

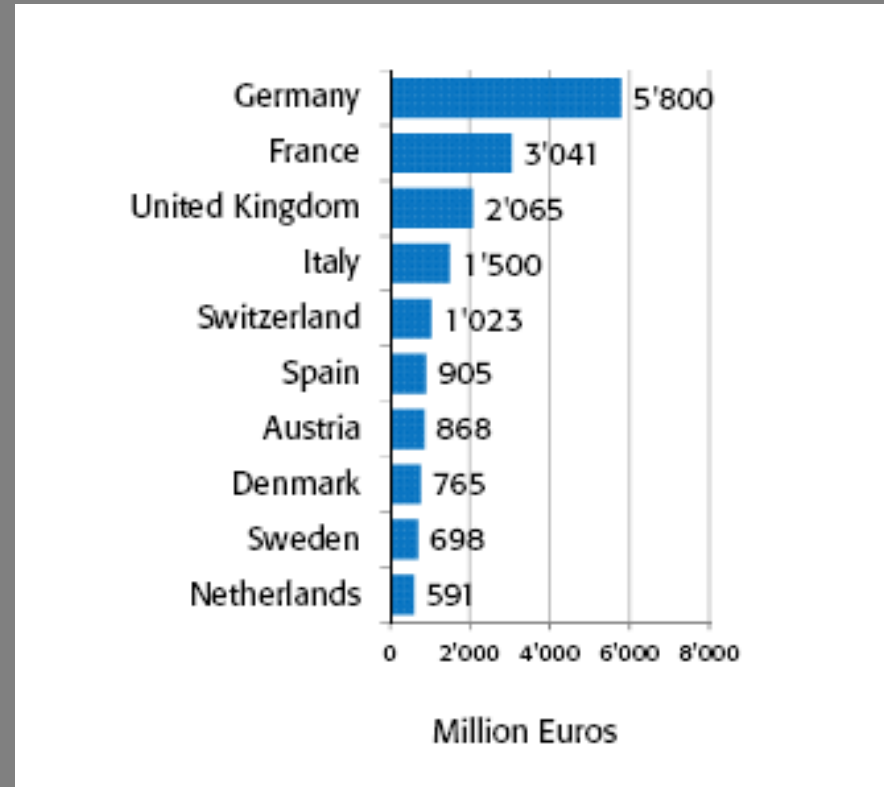


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# Organic market in Europe



Organic market in Europe, 2009

Source: FiBL, AMI, ORC



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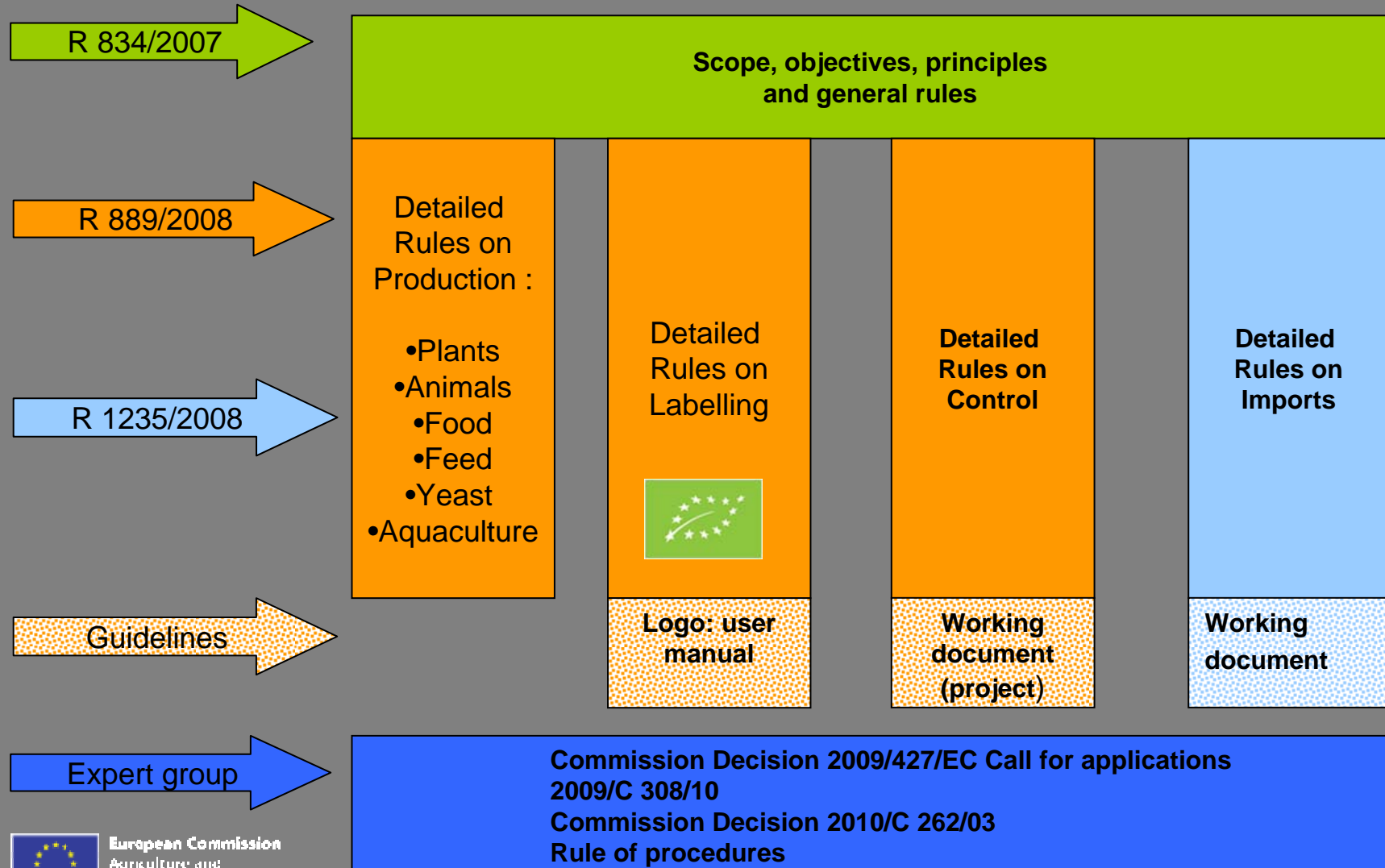


# Where is Organic in the CAP ?

- First regulation in **1991**
- **European Action Plan (2004)**
- No specific budget
- Payments to farmers in CAP pillar II
- New regulation > 2009
- New logo



# Overview of the EU legislation in organic production



# EU organic logo



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# Organic Food labelling

Private Organic standards



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Other quality claims

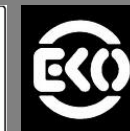


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EU Organic regulation



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Food law → commercial brands .....



# Has organic farming growth potential ?



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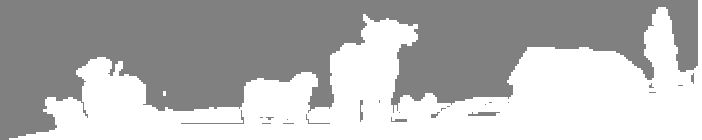


# Demand drivers

- Health
- Environment
- Animal welfare
- Food scare, social pressure, trendy
- Availability



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# Demand limitation

- Price
- False Expectations
  - More healthy
  - Local
  - Traditional
  - Fair
- Fraud
- Availability



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# Key factors for growth

- Consumer awareness
  - Certcost project (FP7) « willingness to pay »
  - Lack of knowledge, misconceptions
- Clear agricultural policy direction
  - VTI study rural development programs
  - Uncertainty blocks conversion of farmers
- Research and Innovation
  - TP Organics → Eco-functional intensification
  - Alternatives and new techniques



# Perspectives

## ➤ Organic in CAP post-2013:

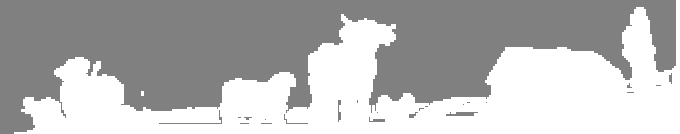
- greening payments 1<sup>st</sup> pillar
- support payments in 2<sup>nd</sup> pillar

## ➤ Develop the consumer side

- Promotion campaigns at national level
- Reasonable price premium !

## ➤ Maintain integrity

- EU regulation
- Fight fraud !



*Thank you for your attention*



[www.organic-farming.europa.eu](http://www.organic-farming.europa.eu)



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