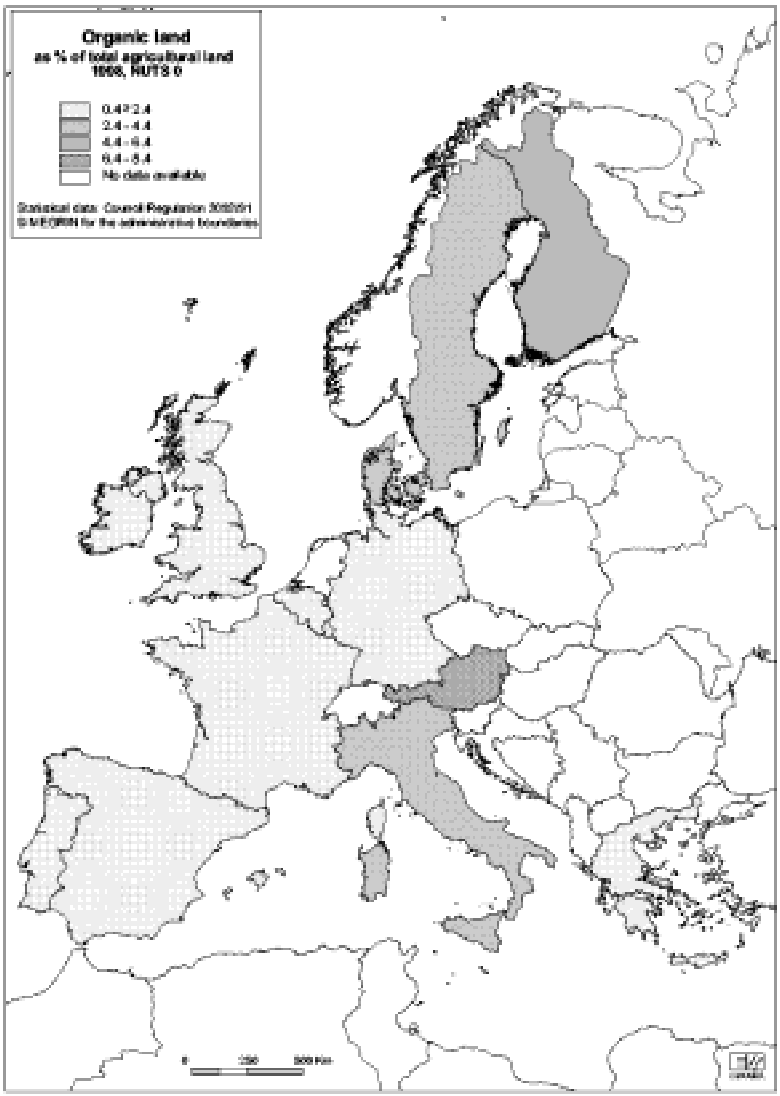
Organic Farming

Jakob Hansen

Organic farming is a small but dynamic activity in EU

1. Introduction

In 1998 the area devoted to organic farming in the EU[1] covered 2 269 000 ha, or nearly 2% of all agricultural land, on 1.4% of all agricultural holdings. Some 13 000 farms entered the organic farming conversion programme, 65% of which were in Italy alone, so that Italy now accounts for 25% of all organic land in the EU. Some 11 000 processors of organic produce are now registered in the EU, 50% more than in 1997, while the number of registered importers of organic produce has risen by a similar percentage, to 509 in 1998. In general, organic holdings are larger than average, however the situation varies considerably from one country to another. As organic farming practices are closely linked to livestock production, production of grass as fodder is by far the most important use of organic land, though olives and vineyards are important in southern Europe.



[1] *All references to EU exclude the Netherlands, for which no data have been received to date.*

Statistics in focus

ENVIRONMENT AND ENERGY

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Contents

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Organic farming can be defined as an approach to agriculture where the aim is to create integrated, human, environmentally sustainable agricultural production systems. Maximum reliance is placed on self-regulating agri-ecosystems, locally or farm-derived renewable resources and the management of ecological and biological processes and interactions. Dependence on external inputs, whether chemical or organic, is reduced as far as possible.

In the European Union, the organic production of agricultural products is regulated by Council Regulation 2092/91. This set out strict requirements which must be met before agricultural products, whether produced in the EU or imported from third countries, may be marketed as organic. In particular, the Regulation severely restricts the range of products that can be used for fertilising and for plant pest and disease control, and requires each Member State to set up an inspection system to certify compliance with these principles.

As described more deeply under "methodology", the data presented in this publication are all derived from the annual report to the Commission from the Member States. The data supplied in these reports did not allow a distinction for all countries between farms fully converted to organic production methods and those in conversion, a period that takes two or three years, depending on the crop. Therefore this publication treats both as organic farms.

2. Area of Organic Land in EU

In 1998 organic land covered an area of about 2 269 000 ha. in the EU or almost 2 % of total utilised agricultural area, with considerable variation from one country to another. Italy accounts for 25 % of EU´s organic land, followed by Germany with ca. 20 %, Austria ca. 13% and Spain ca. 12%. These four countries alone account for almost 70 % of the total organic area in the EU, but only 48 % of the total agricultural area.

Table 1: Agricultural and Organic Area by country

ha

	Utilised Agricultural Area[1] 1997	(%) [2]	Organic Area [3] 1998	(%)[4]	(%)[5]
B	1 382 740	1.1	11 744	0.8	0.5
DK	2 688 014	2.1	93 199	3.5	4.1
D	17 160 010	13.3	416 518	2.4	18.4
EL	3 498 660	2.7	15 402	0.4	0.7
E	25 630 130	19.9	269 465	1.1	11.9
F	28 331 330	22.0	219 792	0.8	9.7
IRL	4 342 380	3.4	24 411	0.6	1.1
I	14 833 110	11.5	577 475	3.9	25.5
L	126 630	0.1	744	0.6	0.0
NL	2 010 510	1.6	:	:	:
A	3 415 090	2.7	287 899	8.4	12.7
P	3 822 120	3.0	29 537	0.8	1.3
FIN	2 171 580	1.7	116 206	5.4	5.1
S	3 109 060	2.4	127 329	4.1	5.6
UK	16 168 850	12.6	78 833	0.5	3.5
TOTAL	**128 690 214**	100.0	:	:	:
N	1 038 000		15 581	1.5	:

(1) arable land, permanent grassland, permanent crops, kitchen garden

(2) % of agricultural area in total EU agricultural area

(3) Organic farms include total organic area in conversion plus area fully converted.

(4) % of organic land in total agricultural land

(5) % of organic land in total EU organic land

The picture changes if the organic land is compared to the total agricultural land in each country, see figure 1. This shows clearly that the concept of organic farming has been embraced more enthusiastically in the newer Member States. Austria has the largest proportion of organic land within the EU, with 8.4 % of the utilised agricultural area given over to organic production methods, while Finland and Sweden follow with 5.4% and 4.1% respectively. Italy and Denmark also report significant values, 3.9% and 3.5% respectively, while in Germany 2.4% of agricultural land is used for organic production. In most of the other Member States values are less than 1%, while the average in EU is 1.8% (excluding the Netherlands).

3. Number and average size of Organic Holdings

Overall, organic farming in the EU is still very much a minority activity with only 1.4% of all agricultural holdings applying organic farming methods. However the situation has changed rapidly in recent years, due to a large number of newcomers into the sector, 8 400 in Italy alone in 1998. The largest percentage change was in Portugal, which saw a 95% increase in the number of organic farms in 1998, albeit from a very low base. The number of organic farms in Belgium increased by 50%, while Denmark saw an increase of 41%, both well above the EU average. There is also considerable variation between EU Member States in the absolute numbers of organic farms. Almost 40 % of the EU´s organic farms are found in Italy, though it should be noted that holdings in Italy are on average much smaller than other EU countries, except Greece. Austria, where the average size of farms is just below the EU average, accounts for 20 % of all organic farms, followed by Germany, ca. 9%, and Spain, ca. 7%. These four countries alone account for around 75 % of the total number of organic holdings the EU, but only 60 % of the total number of agricultural holdings.

Table 2: Organic Holdings, exits and new units by country

(units)

	Total holdings		Organic Holdings[1]			(%) [3]	New Units		Exits	
	1997	(%)	1998	(%) [2]	1997	1998	Units	New Units rates [4]	Units	Exits rates [5]
B	67 180	1.0	439	0.4	317	0.7	158	49.8	36	11.4
DK	63 150	0.9	2 228	2.2	1 617	3.5	670	41.4	59	3.6
D	525 121	7.6	9 213	9.3	8 184	1.8	1029*	:	:	:
EL	821 390	12.0	4 183	4.2	3 086	0.5	106	3.4	213	6.9
E	1 208 260	17.6	7 392	7.4	:	0.6	:	:	:	:
F	679 840	9.9	6 233	6.3	4 935	0.9	1298*	:	:	:
IRL	147 830	2.2	326	0.3	268	0.2	58	21.6	:	:
I	2 315 230	33.7	39 156	39.4	30 701	1.7	8 455	27.5	0	0.0
L	2 980	0.0	26	0.0	23	0.9	6	26.1	3	13.0
NL	:	:	:	:	:	:	:	:	:	:
A	210 110	3.1	20 207	20.3	:	9.6	:	:	:	:
P	416 690	6.1	542	0.5	278	0.1	264	95.0	5	1.8
FIN	91 440	1.3	5 058	5.1	4 458	5.5	738	16.6	138	3.1
S	89 580	1.3	2 939	3.0	2 833	3.3	122	4.3	16	0.6
UK	233 150	3.4	1 462	1.5	:	0.6	:	:	:	:
TOTAL	**6871 951**	100.0	**99 404**	**100.0**	**56 700**	**1.4**	**12 904**	:	**470**	:
N	:	:	1 590	:	1 310	:	376	28.7	96	7.3

(1) Organic holdings also include holdings in conversion.
(2) Share of organic holdings of total organic holdings.
(3) Organic holdings in % of total agricultural holdings.
(4) New units Rates = New units 1998/Total units 1997 *100
(5) Exits Rates= Withdraws 1998 / Total units 1997*100
* Net increase in units

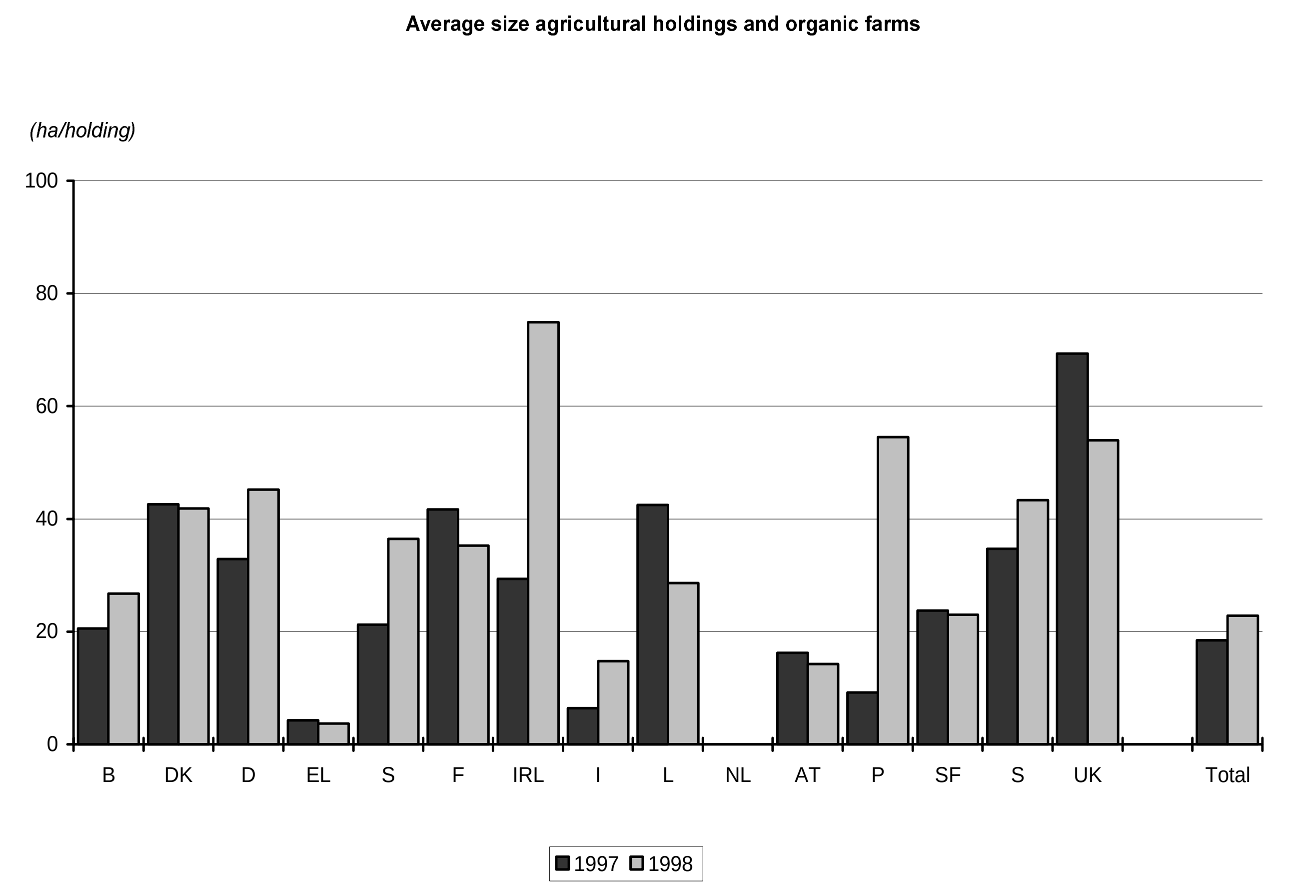
Table 3: Average size agricultural and organic holdings *(ha/holding)*

	Organic holdings 1998	All Holdings 1997
B	26.8	20.6
DK	41.8	42.6
D	45.2	32.9
EL	3.7	4.3
E	36.5	21.2
F	35.3	41.7
IRL	74.9	29.4
I	14.7	6.4
L	28.6	42.5
NL	:	:
A	14.2	16.3
P	54.5	9.2
FIN	23.0	23.7
S	43.3	34.7
UK	53.9	69.3
TOTAL	**22.8**	**18.4**

Again it is notable that the three Member States which joined the EU in the latest enlargement in 1995 (Austria, Finland and Sweden) are found among the four Member States with the largest proportion of organic holdings compared to total number of agricultural holdings. In Austria almost 10 % of farms in 1998 were organic, whereas the numbers for Finland, Denmark and Sweden were 5.5%, 3.5% and 3.3% respectively.

Average size of Organic Holding

At EU level, organic farms are in general larger than the average farm. This is particularly the case for Portugal, where, on average, organic farms are five times larger than the average farm, Ireland (two and a half times larger), and Italy (more than twice the average size). On the other hand, for those countries, where the organic sector has reached a more mature stage, Austria, Finland, Denmark and Sweden (all countries with more than 3% organic farms), the size difference is much smaller or non-existent.



4. Statistics on processors and importers

The Member States have also reported statistics on numbers of processors and importers of organic products[2]. However, the overall quality of the data suffers from missing data for several countries, though some insight can be gained by looking at the numbers.

The total number of registered processors in those countries (including Norway) which have provided information was 11,408 and 7,476 units in 1998 and 1997 respectively, an increase of over 50%. These figures cover a wide range of processors, from small family-run bakeries producing organic bread for the local market, to large companies who also ensure that organic production in non-EU countries follows EU norms and thus can be imported and processed in the EU.

As would be expected, the countries with the largest populations, France, Germany and Italy, also have the largest number of processors of organic produce. UK stands out as the exception here, though as no data is available on the size of these enterprises, it is not possible to draw any conclusions from these figures.

The number of registered importers of organic produce is considerably smaller (533 and 349 in 1998 and 1997 respectively), as would be expected, given the requirement that importers must impose EU standards on non-EU organic producers before they are permitted to import and market their produce as organic. The figures show nevertheless the same increasing trend indicating a significant increase in the international flow of organic produce.

Table 4: Processors and importers, new units and exits by country *(units)*

	Processors of Organic Products		Processors 1998		Importers of Organic Products		Importers 1998	
	1998	1997	New units [1]	Exits [2]	1998	1997	New units [1]	Exits [2]
B	220	190	41	11	33	23	10	:
DK	502	360	205	63	17	14	3	:
D	3 111	2 860	:	:	238	212	:	:
EL	71	32	:	3	:	.	:	:
E	388	:	:	:	2	:	:	:
F	3 467	2 034	:	:	:	:	:	:
IRL	15	11	4	:	:	:	:	:
I	1 327	1 099	228	:	23	6	17	:
L	16	15	3	2	:	:	:	:
NL	:	:	:	:	:	:	:	:
A	437	:	:	:	26	:	:	:
P	25	24	1	:	:	:	:	:
FIN	380	236	162	18	8	7	1	:
S	465	420	45	.	72	67	5	:
UK	664	:	:	:	90	:	:	:
TOTAL	**11 088**	**7 281**	**689**	**97**	**509**	**329**	**36**	**:**
N	320	195	137	12	24	20	4	:

(1) New units Rates = New units 1998/Total units 1997 *100

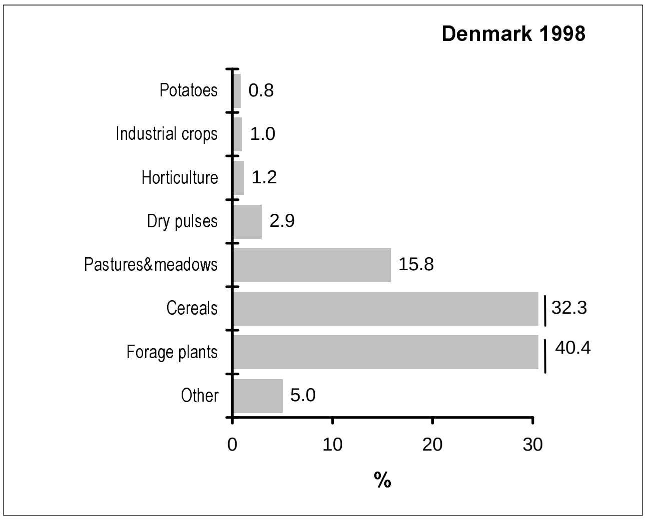
(2) Exits Rates= Withdraws 1998 / Total units 1997*100

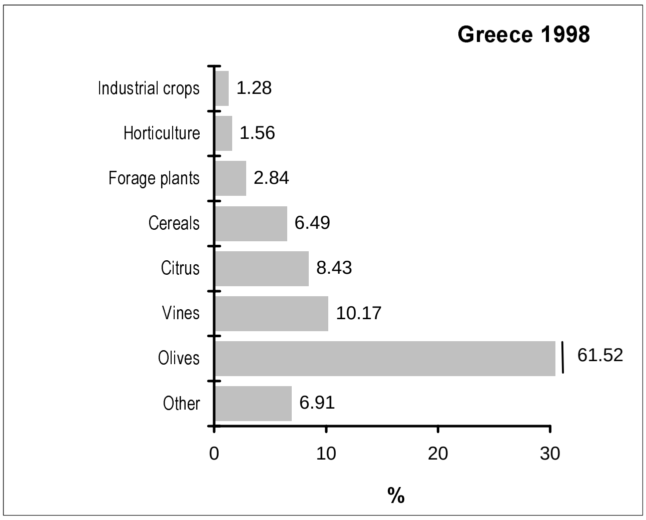
[2] *Definitions of importers and processors can be found in the "methodology chapter"*

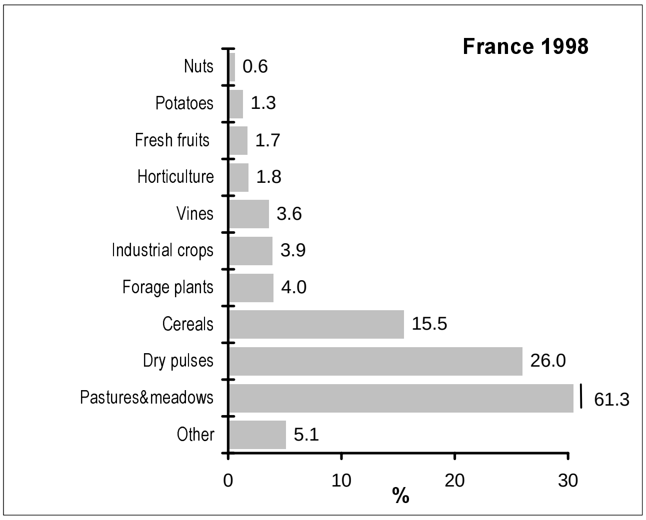
5. Snapshot of the organic production in Member States

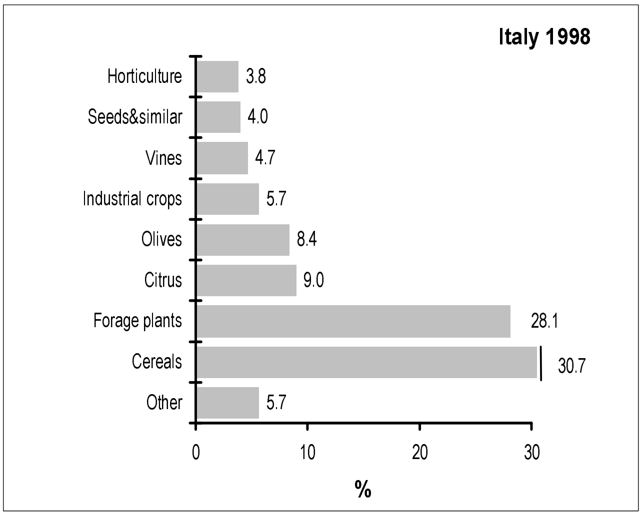
The graphs below illustrate the distribution of crops grown on organic land, for the eight Member States who have submitted information on this issue.

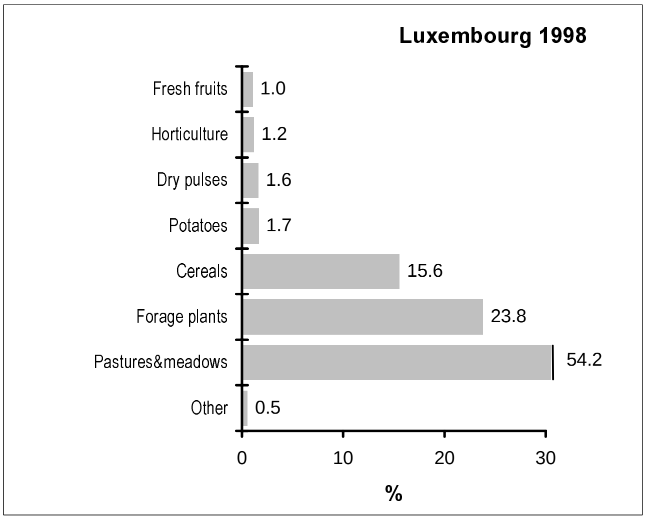
As organic farming practices are closely linked to the livestock production, grassland & forage crops is the most important land use for organic land area, though olives and vineyard is important in southern Europe

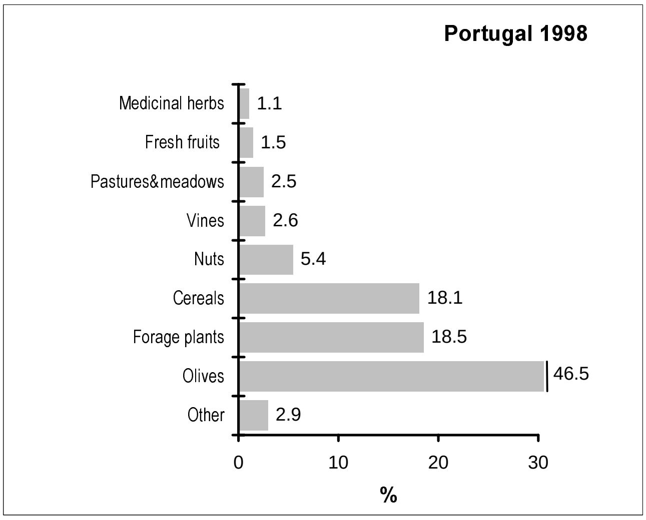


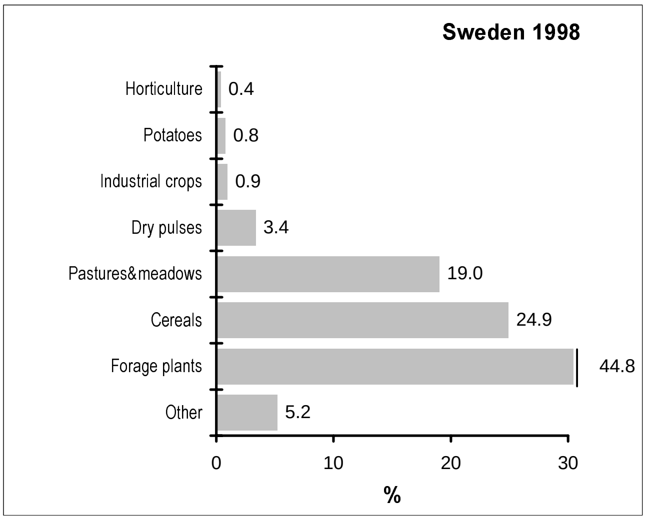


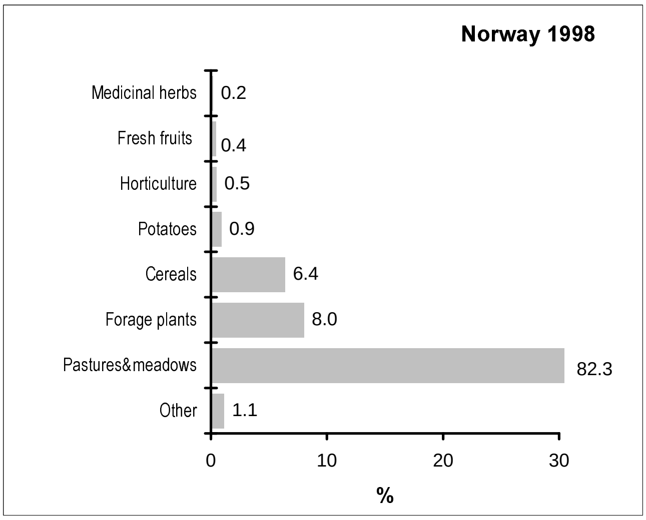












➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Data source

Council Regulation (CEE) No 2092/91 on organic production of agricultural products requires Member States to report to the Commission on 'measures taken in the preceding year for the implementation of this Regulation'. Standardised forms on statistical data have been designed to help harmonise this reporting procedure.

The statistical information on organic production presented in this publication is based purely on the information submitted by Member States in these forms.

Data treatment

As only a few Member States have given complete answers to all the questions on organic farming, the tables presented in this publication are the result of what has been feasible under these restrictions.

The reader should also be alerted to the fact that units of producers, processors and importers should not be added up, because the same operator can appear in several categories, as defined below, at the same time:

Terminology

<u>Producer/organic farmer</u> is any natural or legal person who operates an agricultural holding involved in producing, packaging and initially labelling as products of organic production agricultural products produced in that holding.

<u>Processor</u> is any natural or legal person who preserves and/or processes organic agricultural produce (including slaughter and butchering of livestock). Packaging and labelling as organic is also considered as processing.

<u>Importer</u> is any natural or legal person who imports from a third country with a view to the subsequent marketing of the products above described.

<u>Organic-production unit/holding/farm</u> is a unit, holding or farm complying with the rules of the Regulation.

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