

# Organic Agriculture in Spain

JOAN PICAZOS AND ANGELES PARRA

## Contents

1	Introduction.....	264
2	Development of Organic Agriculture .....	264
3	Regional distribution of Organic Farms .....	265
4	Farm Structure .....	266
5	Land Use .....	266
6	Processing .....	268
7	State Legislation and Certifying Organisations.....	268
8	State Support for Organic Farming.....	269
8.1	Financial Support for Farmers .....	269
8.2	State Support for Research, Marketing and Organisations.....	269
9	Advice .....	270
10	Information, education and research.....	270
11	Other Organisations .....	270
12	Marketing .....	271
13	Outlook .....	272
14	Authors .....	273



## 1 Introduction

In terms of organic agriculture Spain is much more of a producer than a consumer. The natural conditions of our country (relatively moderate use of agri-chemicals, numerous ecosystems and a favourable climate for early-cultivation) have promoted the introduction of organic agriculture, but until now there was no home market with stable trade-structures. Therefore approximately three-quarters of the production (for the most part typical Mediterranean crops) are exported, mainly to central and northern European countries.

This activity was promoted by Asociación Vida Sana. Early organic farmers were either strongly motivated by the organic agriculture ideal, or they were farmers who made contracts for certain products for which traders could guarantee sale. Today the spectrum of the producers is more complex, and there are many producers for whom organic agriculture presents an economic alternative to conventional agriculture, since it offers major opportunities to sell quality-products at appropriate prices. The future development of organic farming depends on the development of the domestic market, making possible a higher variety of crops.

## 2 Development of Organic Agriculture

Organic farming in Spain came up in the 70's. Small farms, basically promoted by young people converted in the middle of the 70's. The first important project of a noteworthy group of members was the conversion of the Calasparra (Murcia) rice co-operative. Spanish organic agriculture has shown a slow but steady growth in the course of its development. In the last years - mainly since the introduction of state legislation on organic agriculture – a speeding-up in the development was observed.

The number of organic farms has increased twelve-fold between 1994 and 1999, and the number of processing companies more than trebled. At present (1999) there are 11,773 producers (0,9 % of all farms) and 515 processing companies.

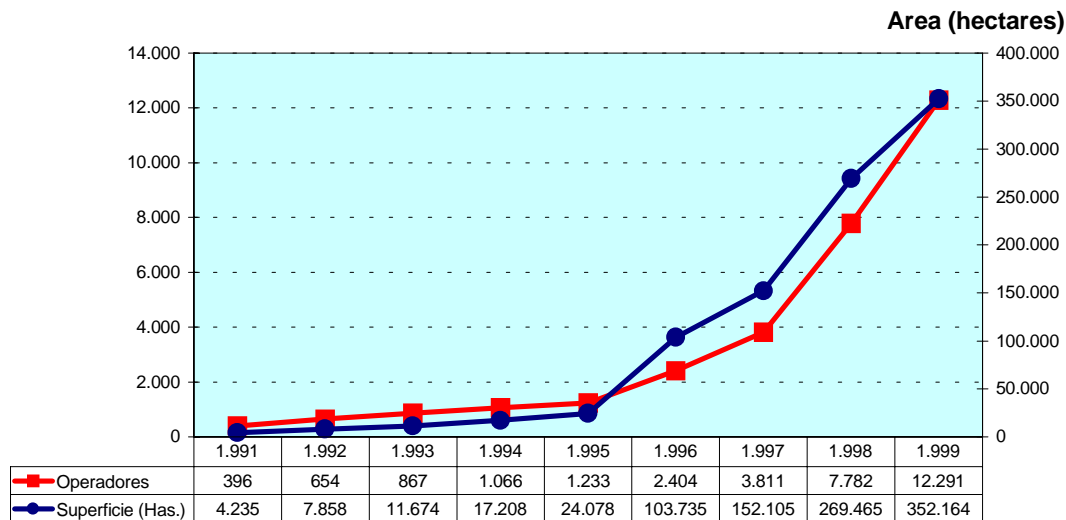
In the same period the organically farmed surface rose from 17,208.9 hectares to 352,164 hectares (1.4 % of the agricultural land) (see figure 1). The average size of an organic farm- 30 hectares- is higher than the conventional one (18 hectares).



Figure 1: Development of Organic Agriculture in Spain 1991-1999 (Operadores = farms; Superficie = land area)

### Development of Organic Agriculture (1991-1999)

Numbers of farms



Source: S.G.Denominaciones de Calidad. M.AP.A.

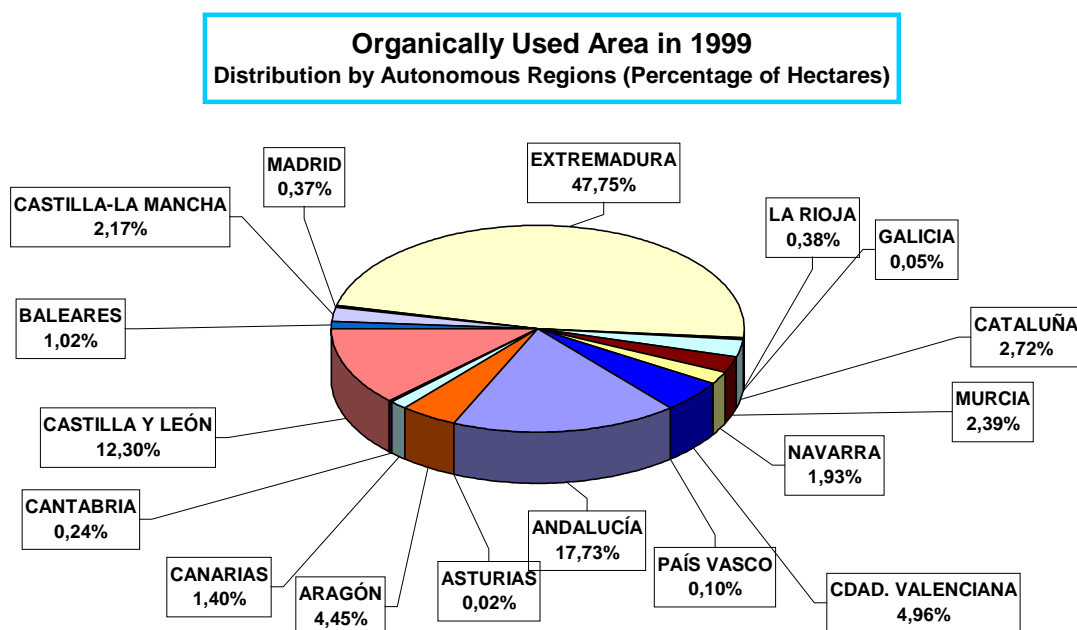
### 3 Regional distribution of Organic Farms

The region with the highest number of organic farms is now Extremadura (6.743), followed by Andalucía (2.489). This is due in great part to the support of the public administration to the reconversion of farms that were already submitted to extensive practices. In the case of Andalucía, the export of produce and olive oil is continually growing. Other areas with significant organic production are Murcia, Valencia, Catalonia and Aragón (see figure2).

In terms of processing companies, the distribution differs: here, Catalonia occupies the first position with 103 companies, followed by Andalucía with 77 and Valencia with 64 businesses. There are only three importers from third countries; they have their headquarters in Catalonia. Trade from other European countries is much more important, due to the weak domestic market.



Figure 2: Regional Distribution of Organic Land in 1999



Source: S.G.Denominaciones de Calidad. M.A.P.A.

#### 4 Farm Structure

The amount of organically farmed land is not directly related to the number of farms of a region. For example in Andalusia, 2,489 producers cultivate only 62,318 hectares. In Castilla y León instead only 191 producers cultivate 43.245 hectares (1999).

At present (1999), there are 1.159 farms with animal husbandry, of which 625 are cattle and 342 sheep farms. These farms are mainly situated in Castilla y León and Extramadura. However, animal farms also exist in Catalonia, Aragon, in the Basque country, the Baleares, the Canary islands, in Castilla La Mancha, Andalusia, Valencia, Asturia and Galicia.

The property structure in the south and in the middle of the country is characterised by large farms, with agricultural workers managing the land. In the north and in some parts of the east, the agricultural land is very splintered. Most farms here are family run.

#### 5 Land Use

Based on its diverse climatic conditions – ranging from continental to Mediterranean - Spain has the prerequisites for cultivating a large product range. The following products (listed in the order of importance) are cultivated in organic agriculture: grain, pulses, vegetables, citrus fruits, fruit, olives, wine, nuts, subtropical plants, medicinal and aromatic herbs as well as animal fodder (see figures 3 and 4).



Figure 3: Land use in Organic Agriculture (without grassland)  
 (Source: S.G. Denominaciones de Calidad. M.A.P.A.)

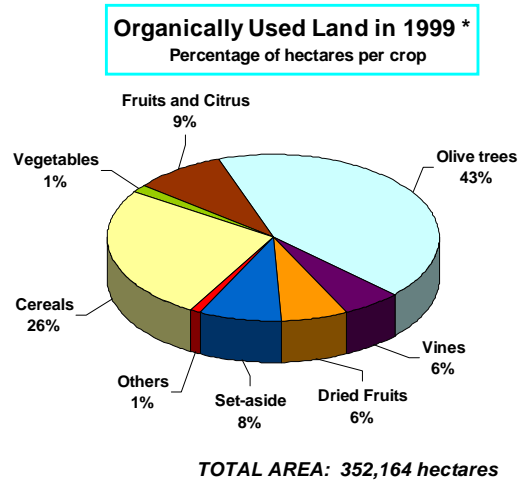
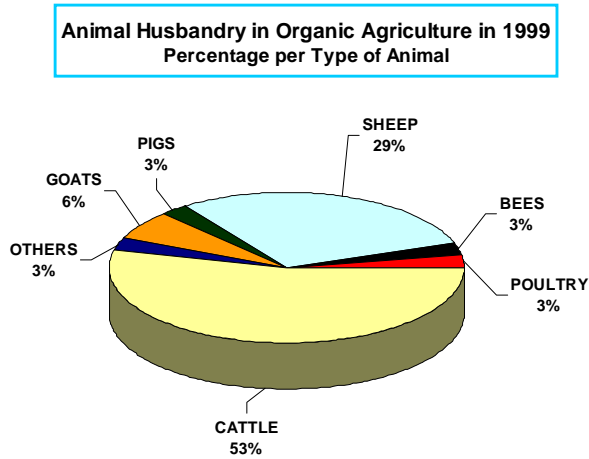


Figure 4: Animal husbandry in Organic Agriculture  
 (Source: S.G. Denominaciones de Calidad. M.A.P.A.)



Source: S.G. Denominaciones de Calidad. M.A.P.A.



## 6 Processing

The bulk of the processing firms are pre-processing companies like oil-mills or businesses which can fruits and vegetables or peel nuts. They usually produce for external markets (the European community and - in the oil sector – the United States).

Additional processors produce bread and other cereals, wine, juices, canned fruit and vegetables, soy-products, bread-spreads and baby-food. Products with a short durability (e.g. milk) are distributed through the country via small firms with good, specialised distribution systems. These firms, however, for the most part still sell health food products and not primarily organic products.

The conventional processors have not yet directly entered the organic market, although their awareness is rising. For some products, where processing large specialised installations are needed conventional enterprises are co-operation-partners.

## 7 State Legislation and Certifying Organisations

In Spain, EU-regulation 2092/91 on organic products is implemented by royal decree No. 1852/1993, covering organic agricultural production and the labelling of agricultural products and foods. The regions are in charge of implementing the decree, and each region has competent authority. The decree legally protects expressions like „ecológico“ (ecological), „biológico“ (biological) and „orgánico“ (organic) as well as the abbreviations „eco“ and „bio“. Food labelled with these terms must have been produced according to the rules of this decree.

On October 4, 1989, a law was put into force that was concerned with the criteria for the labelling of organic produce and the creation of a responsible authority, the Consejo Regulador de la Agricultura Ecológica (CRAE) - or Regulation Committee on Organic Agriculture. After a difficult period of acceptance and implementation of this law, a state inspection system was introduced as well as the use of the CRAE logo as identification for organic products.

The tasks of the CRAE, which no longer exists in its original form, were then transferred to the regions, and each region now has its own competent authority. Essentially these authorities have assumed the basic pattern of the CRAE-structure. The producers and the processors have a majority in the steering committees, while trained officials implement certification and control. Each region has developed its own trademark on the basis of the old CRAE logo.

Regional CRAE-Logo



In addition to the logos of the competent-authorities some of the private trademarks- in existence for many years- are used because consumers trust them.





## ASOCIACION VIDA SANA

One example is the trademark of the Vida Sana organisation, which is the most widely recognised Spanish organic trademark. In addition to the original identification, this seal is also used for products from other European countries.

With the royal decree 1852/1993 the Comisión Reguladora de la Agricultura Ecológica /co-ordination-committee for organic agriculture (CRAE) was established as an advisory body for the competent authorities on issues of standards, research, support and control. Furthermore, the commission is a forum for exchange between organic producers, processors, traders and their associations as well as consumers and the competent authorities. The certifying committee of the CRAE, in which the competent authorities of all regions are represented, meets frequently and thus serves as an effective co-ordination instrument.

## 8 State Support for Organic Farming

### 8.1 Financial Support for Farmers

With the royal decree 51/1995, EU-regulation 2078/92 was integrated into Spanish legislation on 20.1.1995. It opened up the possibility of promoting environmentally friendly production methods such as organic agriculture. These monies are administered and distributed by the autonomous regions. In Catalonia, Galicia and Madrid no financial support is granted to organic farmers.

In the second year, producers get 80 percent of the payments and, in the next three years, 60 percent. Farmers who already work organically can get 60 percent of the payments for five years.

### 8.2 State Support for Research, Marketing and Organisations

There is presently no money available in Spain for research in organic agriculture and for organic marketing. The only related activities are those of the working groups of the CRAE, which are composed of representatives of the authorities, private organic agriculture organisations and consumer-associations. They work towards creating structures that can initiate research and marketing activities.

As for marketing, the state provides some support for organising organic fairs. At present, the CRAE organic agriculture working group examines possible common support and marketing-measures for the domestic market as well as for export.

The annual Biocultura fair at Madrid and Barcelona as well as national and international conferences are important for consumer information.



## 9 Advice

There is no central organisation for advice in the area of organic agriculture. However, small specialised co-operating organisations do exist. (ATAB for example, Asociación de Técnicos para la Agricultura Biológica, or association of organic advisors).

Advice is mainly given by private advice-offices however. One has to emphasise that an increasing number of well-trained specialists in organic agriculture is available, guaranteeing good advice for farmers and processors.

Small producer groups also exist, frequently organised in co-operatives and employing an advisor. Some departments of the agricultural administration offer advice on biological pest control. In this area very positive experiences exist. Furthermore, the regional offices of the agricultural administration organise advanced training events for farmers.

## 10 Information, education and research

There are several informative magazines about organic agriculture in Spain: Bolecin, Boletín Seae, Boletín Vida Sana, Integral, Savia, and Humus. Vida Sana also publishes practical information for farmers. Some Spanish publishing houses devote themselves to organic agriculture: Ateneos, El País-Aguilar, Oasis, Obelisco, Océano, and RBA to name a few.

The training situation in Spain is comparatively good. There is a special course for college graduates, and there are also training courses for practitioners. Vida Sana (healthy life) was the first organisation to offer these courses. To a large extent the training available in organic farming is provided by them. Vida Sana is acknowledged by the ministry of agriculture, but receives no financial support. Apart from Vida Sana several small initiatives that are in general co-ordinated by the agricultural authorities of the regions exist. Some universities- for example those of Córdoba and Tenerife- offer seminars on the topic. A master in organic agriculture is currently being held for the first time at the University of Barcelona.

Scientists, ministries of agriculture, universities, associations and the Centro de Investigaciones Científicas (research centre) are active in organic agriculture research. In most cases, however, these are private initiatives.

In this context, we would also like to refer to the scientific congresses, which have been organised for many years, by Vida Sana, the Sociedad Española de Agricultura Ecológica (Spanish society for ecological agriculture), the faculty of veterinary medicine of the university Córdoba and agricultural unions amongst others.

## 11 Other Organisations

There are only a few organic farming associations in Spain. Until recently, the main activity of the associations was the inspection of the associated farms.



The majority of the processors have joined Asociación Española de Transformadores y Comercializadores de Productos Biológicos, the association of organic producers.

Other members of IFOAM include the union of the natural food shops (Gremio de Establecimientos Alimentación Natural y Biológica) and the association of the organic farmers of Murcia. Organisations with a further reaching objective are

- Vida Sana,
- Asociación de Agricultura Biodinámica de España (Spanish bio-dynamic agriculture club),
- the co-ordination-committee for organic agriculture CRAE
- Sociedad Española de Agricultura Ecológica (Spanish society for ecological agriculture).

Some agrarian unions, like COAG or ENHE, also have departments of organic agriculture.

## 12 Marketing

The first organic products appeared on the market in 1975, when a small assortment of dietary products was sold in some businesses. 1978 saw the first exports of organic products (rice). Then began a period that was influenced by foreign traders. Their activities did not always contribute to the strengthening of the producer and association structures in the country. The domestic market has up until now been very strongly shaped by health food products.

The specialised trade for organic products is only weakly developed, and even today organic products are hard to find in the conventional distribution network. This weak market presence is in contrast to the obvious interest of the consumers in healthy quality products (showing that organic agriculture has indeed attained extensive recognition at public and state level).

The distribution is the weak link in the producer- consumer chain. This applies especially to the retail trade. It is therefore desperately necessary to strengthen structures to bring the product to the consumers.

Direct sales from farms plays a subordinate role. There are however some successful examples of direct marketing at weekly farmers markets.

The majority of health food and herb shops (approximately 2500) offer a selection of organic products. This is the most important marketing channel. However, many of these shops only have a limited profitability, because they have a monthly turnover of less than 4500 Euro (for all products).

The number of natural food stores – in Spain only a slightly more than 100 exist - is currently expanding. They represent the most important purchasing place for informed consumers. Spain's regionally acting wholesalers play an important role for this type of distribution.



Furthermore, throughout the country approximately 20 associations and consumer-co-operatives of local importance exist. Their outlets have only very restricted opening-hours. The motivation and education of their employees is on the whole good, but this model is not expanding at the moment - perhaps because of a lack of necessary financial means for further development.

Very few organic products can be found in the supermarkets. Some supermarket-chains offer to a limited extent fruit and vegetables from organic cultivation, in addition to which they have organic products in their health food and drugstore departments. For the distribution of fruit and vegetables (an important component of the Spanish shopping basket) initiatives are forthcoming which try to compete with conventional products by calculating very sharply.

The export of raw materials and semi-processed products to processors from other European countries, which incorporate the ingredients from organic cultivation into their product lines, is also of importance.

### 13 Outlook

Within the rapidly changing global context, we see the challenge for organic agriculture to develop into a real alternative for the broad population without losing its identity and simultaneously retaining its leadership role. For small agricultural producers, organic agriculture is one of the few remaining alternatives, if they succeed in placing their products on the market.

The national wholesalers with a large product range are under continuous pressure from suppliers as well as from the buyers. Instead, a small regional trader can have very good profits in Spain. One has to realise however, that they primarily trade in health food and dietary products.

With sufficient turnover, the specialised natural foods trade could in the future play an important role in the marketing of organic products. Important prerequisites for this would be:

- qualified personnel
- clear product labelling
- professional image
- wide product range, in which the fresh-products play a major role
- offer product tastings: from the simple tasting in the shops up to the organisation of courses, opening of restaurants or stores with restaurant
- highest product-quality.

Finally, the necessity of general advertising as well as information campaigns has to be emphasised. Consumer education must be given priority. The co-operation of everyone within the organic sector is therefore imperative to guarantee a common action and to attain public support.



According to a saying, the agriculture of the future will either be organic or non-existent. To ensure that organic agriculture will be the future, we should not forget that the customers are our most important allies.

## 14 Authors

- Joan Picazos, Asociación Española de Fabricantes de Productos Biológicos, Central de Productos Biológicos (CPB), Ctra. Sabadell a Granollers km 12<sup>o</sup>7, nave 3, E-08185 Lliçà de Vall (Barcelona), Tel. 0034-3-8436517, Fax 0034-3-8439600
- Angeles Parra, Asociación Vida Sana, Clot 39, 2<sup>o</sup>, E-08018 Barcelona, Tel. 0034-3-5800818, Fax 0034-3-5801120

---

© by Stiftung Ökologie & Landbau, 2000. All rights reserved.

- Bibliographical Reference  
Picazos, Joan and Angeles Parra: Organic Farming in Spain. In: Steffi Graf / Helga Willer (Eds.): Organic Agriculture in Europe. Results of the Internet Project <http://www.organic-europe.net>, Co-funded by the EU-Commission, General Directorate Agriculture (GD Agri), SÖL-Sonderausgabe 75, Stiftung Ökologie & Landbau (SÖL), Bad Dürkheim, Germany, 2000.
- Address of Editor of Internet Site  
Stiftung Ökologie & Landbau (SÖL)  
Weinstraße Süd 51, D-67098 Bad Dürkheim  
Tel. +49-(0)-6322-8666, Fax +49-(0)-6322-989701  
E-Mail: [info@soel.de](mailto:info@soel.de), Internet: <http://www.soel.de>



Picazos, Joan and Angeles Parra: Organic Agriculture in Spain  
<http://www.organic-europe.net>, 30.3.2000  
© Stiftung Ökologie & Landbau (SÖL), Bad Dürkheim, Germany, 2000.