

# ORGANIC IN EUROPE

## PROSPECTS AND DEVELOPMENTS

**EDITOR AND PUBLISHER:**



IFOAM EU Group  
Rue du Commerce 124, BE - 1000 Brussels, Belgium  
Phone: +32 2280 1223 - Fax: +32 2735 7381  
info@ifoam-eu.org  
www.ifoam-eu.org

**EDITORS:** Stephen Meredith and Helga Willer

**PRODUCTION SUPPORT:** Laura Ullmann, Ann-Kathrin Trappenberg, Laura Maeso and Kathleen Delage

**COUNTRY REPORT AND STATISTICAL DATA COLLECTION, DRAFTING AND EDITING:** FiBL Projekte GmbH

**LANGUAGE EDITING:** Alastair Penny

**SPECIAL THANKS FOR THEIR CONTRIBUTIONS TO:** Bram Moeskops, Emanuele Busacca, Antje Kölling, Gianluigi Cardone and Patrizia Pugliese, Marie Reine Bteich, Lina Al-Bitar, Virginia Belsanti, Jörn Sanders, Otto Schmid, Diana Schaack and all national experts who contributed to the country reports.

**DESIGN AND LAYOUT:** fuel.bvba/sprl – www.fueldesign.be

The opinions expressed by the authors are their own and do not necessarily reflect the opinion of IFOAM EU. While all efforts were taken to ensure the accuracy of the publication's content and to collect statistics and reports from all countries, errors and omissions cannot be entirely ruled out. Corrections and additional content should be sent in writing to helga.willer@fibl.org. Should revisions or additional content be necessary they will be published at: www.ifoam-eu.org.

**PARTNERS:**



**SUPPORTERS:**



IFOAM EU Group, FiBL and CIHEAM-IAMB

# ORGANIC IN EUROPE

## PROSPECTS AND DEVELOPMENTS



This publication was printed on FSC certified paper, by an FSC Chain of Custody certified printer, making use of vegetable inks.

**Support under the EU rural development programme:** Subsidies to convert to organic farming, amount to EUR 140 (DKK 1 050) per hectare annually, during the conversion period. An additional EUR 13 (DKK 100) per hectare annually will also be provided over the three subsequent years, during the first 5-year commitment period.

**Other policy support:** Farmers can apply for direct payments in support of extensive or environmentally friendly farming practices of EUR 110 per hectare. In addition to the financial support for organic farmers, the Danish government also discourages conventional farming by levying high taxes on products such as fertilisers and pesticides. Funding is provided to the International Centre for Research in Organic Food Systems (ICROFS), for investments in new technologies and for the development of new products.

### RESEARCH & ADVICE

ICROFS calls itself a *centre without walls*, where scientists remain in their own locations while working across institutions. Its activities are coordinated by a secretariat at the Research Centre Foulum, Aarhus University. Since 1996 three major organic research programmes have been launched DARCOF I, II and III.

The Danish Agricultural Advisory Service is Denmark's oldest and largest organic extension service. Run by the farmers' union, the Danish Agriculture & Food Council, it operates on two levels. Regionally, about 30 agricultural centres provide advice to farmers, while the experts working at the central Knowledge Centre for Agriculture coordinate the development of the advisory services.

### CHALLENGES & OUTLOOK

Consumers, politicians, companies and farmers are all looking for ways to secure sustainable development in Denmark. Organic farming plays a vital role in this. The challenges facing the stakeholders include the need to maintain the integrity and the quality of the organic products, while further developing organic farming and informing consumers about organic products. The political establishment must maintain its focus on organic farming as an effective environmental tool and not just a market opportunity, and conventional processors must become involved in the processing and promotion of organic products, both in Denmark and abroad.

### FURTHER INFORMATION

- Organic Eprints for Denmark: [www.orgprints.org/view/projects/1darcof.html](http://www.orgprints.org/view/projects/1darcof.html)
- Denmark's biggest agriculture website, providing more than 100 000 articles on agricultural practice: [www.landbrugsinfo.dk](http://www.landbrugsinfo.dk)

For other relevant websites, see the section on key sector institutions

# ESTONIA

Merit Mikk<sup>22</sup>



### KEY INDICATORS 2012<sup>23</sup>

Area	Organic agricultural area	144 149 hectares
	Share of total agricultural area	15.3 %
	Change 2002 to 2012	+370 %
	Change 2011 to 2012	+8 %
Operators	Organic producers	1 478
	Organic processors	64
	Organic importers	No data
	Organic exporters	No data
Market and trade	Retail sales	Estimated value EUR 20 million (2011)
	Share of total market	1.6 % (all organic products, 2011); 0.47 % (Estonian organic products, 2011)
	Per capita consumption	Approx. EUR 15
	Change in retail sales 2011 to 2012	No precise data for all organic food; 39 % increase in Estonian organic food sales (2010 to 2011).
	Organic exports	No data
	Organic imports	No data

### HIGHLIGHTS FOR 2013 & 2014

- The new Organic Action Plan 2014-2020 is in preparation
- The first organic farmers' cooperative *Eesti Mahe* is 10 years old

### HISTORY OF ORGANIC FARMING

- 1989: Foundation of the Estonian Biodynamic Association
- 1997: First Estonian Organic Farming Act
- 2006: Foundation of the Estonian Organic Farming Platform (uniting all the active organic farming organisations)
- 2007: First Estonian Organic Farming Action Plan

## KEY SECTOR INSTITUTIONS

- Estonian Organic Farming Platform (EOFP)
- Estonian Organic Farming Foundation (EOFF): [www.maheklubi.ee](http://www.maheklubi.ee)
- Farmers' Cooperative *Eesti Mahe* (Estonian Organic): [www.eestimahe.ee](http://www.eestimahe.ee)
- Centre for Organic Farming of the University of the Life Sciences: [www.mahekeskus.emu.ee](http://www.mahekeskus.emu.ee)
- Centre for Ecological Engineering (CEET)

## PRODUCTION BASE: LAND USE AND KEY CROPS

Of the total agricultural area, 54 % consists of permanent grassland and grazing areas (78 453 hectares), 44 % is arable land (63 933 hectares), and 1 % is used for permanent crops. The key arable crops are temporary grasslands (31 415 hectares), cereals (23 626 hectares) and oilseeds (3 065 hectares). The key permanent crops are berries (1055 hectares), fruits (507 hectares) and medicinal and aromatic plants (not separated by arable and permanent crops, in total 51 hectares). In addition to the agricultural land, there are almost 130 000 hectares of wild collection areas.

## MARKET

The development of organic processing and marketing has not kept up with developments at the farm level. The main obstacle to sales of locally produced organic food is that processing is under-developed (small number of processors and small production amounts). Therefore a lot of organic raw produce (mostly from animal husbandry) are sold as conventional. However, in 2012 strong growth was also recorded in these areas.

**Market channels:** No official data on market channels exist. Considerable amounts of organic food are sold through specialist organic and health-food shops (more than 40 shops). Direct marketing also has a notable share, but its importance is decreasing. The biggest increase in sales over the past two years is likely to have occurred in conventional stores and supermarkets. Some new marketing channels have appeared (e.g. fresh milk vending machines in supermarkets).

**Exports and imports:** Data on exports and imports are not publicly available. It is estimated that around 70 – 75 % of organic products sold are imported. These are mostly processed products, but also include some vegetables and fruits. Some milk and meat products are imported. A limited number of products are exported. Those sold in the largest quantities are cereals (mostly through the organic farmers' cooperative *Wiru Vili*) and meat. Exported amounts are growing every year.

## STANDARDS, LEGISLATION, ORGANIC LOGO

Estonia applies EU legislation on organic farming and other regulations and is implemented at the national level by the Estonian Organic Farming Act and associated ordinances.

There is a national logo, and most of the Estonian producers use it on their products. The national logo is far better known than the EU organic logo.

## POLICY SUPPORT

**National action plan:** The Estonian Organic Farming Action Plan 2007-2013 exists, together with a plan for its implementation (*Eesti Mahepõllumajanduse Arengukava ja selle rakendusplaan aastateks 2007-2013*). It aims to increase the competitiveness of organic farming, increase the market share of organic products, and make local organic food more easily available to consumers. No guarantees were made that all the planned measures in the action plan, or the plan for its implementation could be funded (or implemented), but the Ministry of Agriculture has allocated some money every year. Funds from the rural development programmes and other sources have also been used (often through projects initiated by organic organisations). Almost every year, the Ministry of Agriculture has financed a seminar to evaluate the implementation of the organic action plan. The preparation of the new organic action plan has started.

**Support under the EU rural development programme:** Organic farming support payments have been made since 2000; since 2004 (when Estonia joined the European Union) these have been part of the rural development agri-environment support. The support payments are granted for arable crops (cereals, oil and fibre crops, potatoes, fodder roots, legumes, and temporary grasslands); field vegetables, medicinal and aromatic herbs, fruits and berries; and grasslands (excluding temporary grassland) where at least 0.2 livestock units are kept per hectare. In addition, support is also available for organically kept grazing animals, poultry, pigs and rabbits, and for organic beehives.

**Other policy support:** State support for market development is not especially targeted at the organic sector, but organic farming organisations have been active in applying for it (e.g. to implement promotion activities, organise farmers/processors participation in local fairs, study trips for farmers to different countries).

## RESEARCH & ADVICE

Only a few research projects exist in the field of organic farming. Most of them are conducted by the Jõgeva Plant Breeding Institute, the Agricultural Research Centre and the Estonian University of Life Sciences.

A specialised organic farming advisory system does not exist in Estonia. Advisors are mostly self-employed and connected to the county-level advisory services. There are no advisors specialising purely in organic farming. Organic farmers are offered courses of basic and further training, which meet the requirements of the Ministry of Agriculture and are financed through the rural development programmes. In addition to these courses, other financial resources are available for the organisation of training.

## CHALLENGES & OUTLOOK

The Estonian organic sector needs to develop organic food processing and boost the domestic organic food supply. Consumers' interest in organic food has increased considerably, and the organic market has shown quite rapid development in both 2012 and 2013. Interest is also increasing in the catering sector (e.g. restaurants, kindergartens, schools).

## FURTHER INFORMATION

- Organic Eprints for Estonia: [www.orgprints.org/view/projects/estonia.html](http://www.orgprints.org/view/projects/estonia.html)
- Ministry of Agriculture, with an organic section and links to legislation, a wide variety of published information materials and reports: [www.agri.ee/mahepollumajandus](http://www.agri.ee/mahepollumajandus)

For other relevant websites, see the section on key sector institutions.

# FINLAND

► Sampsa Heinonen<sup>24</sup>



## KEY INDICATORS 2012<sup>25</sup>

Area	Organic agricultural area	197 751 hectares <sup>26</sup>
	Share of total agricultural area	8.7 % (2012)
	Change 2002 to 2012	+20 %
	Change 2011 to 2012	+5.1 %
Operators	Organic producers	4 322
	Organic processors	352 (2011)
	Organic importers	27 (2011)
	Organic exporters	No data
Market and trade	Retail sales	EUR 202 million
	Share of total market	Slightly less than 2 %
	Per capita consumption	EUR 37.4
	Change in retail sales 2011 to 2012	24 %
	Organic exports	EUR 14 million (2009)
	Organic imports	No data

## HIGHLIGHT FOR 2013

In May 2013, the Finnish Government launched a programme aiming to make 20 % of the cultivated area organic by 2020.

## HISTORY OF ORGANIC FARMING

- 1918: First documented, intentional farm conversion to organic production (natural agriculture)
- 1927: First biodynamic farm
- 1946: The Finnish Bio-dynamic Society is founded
- 1930s: Artturi Virtanen develops the AIV-System, a cultivation method which includes crop rotation with intensive red clover leys and pastures and bread grains.
- 1985: Finnish Association for Organic Farming Luomuliitto is founded
- 1990: State programme for financial support for conversion to organic is launched
- 1995: Finland becomes a member of the EU, and many farms convert to organic farming
- 2011: Founding of Pro Luomu, an association for the marketing of organic products
- 2013: The Organic Production Development Programme is launched