



Organic production and the European Union



IN-DEPTH ANALYSIS

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This document is aimed at providing readers with a general outline of organic agriculture. It gives an overview of the principles of this type of farming, and provides the specifications for special forms of production that are not necessarily very widely known. The document illustrates the size and importance of the sector and how it is growing, while also indicating the challenges posed and questions that may arise, especially as regards the future prospects of the organic sector. It also touches briefly on the European Commission's initiative to revise the regulatory framework for organic production in the EU, together with an action plan for developing the sector. While the first reading of this draft regulation by the European Parliament and the Council is now in progress, the Commission could withdraw its proposal if it is not quickly approved.

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SUMMARY

Organic production is an environmentally friendly form of agricultural production that is based on cultivation and animal husbandry practices that are in tune with natural cycles. The use of genetically modified organisms is prohibited and that of synthetic chemicals kept as low as possible, and farm animals enjoy a high level of welfare.

Beyond the producers (farmers and aquaculturalists), the organic sector covers an entire production chain, which encompasses everything from the supply of raw materials and their conversion to produce food and feedstuffs, right through to distribution channels and retailing, all while keeping consumers informed. Organic production is regulated at EU level – with rules that have to be adapted to the diversity of the productions – and backed up by control and certification procedures. The values of organic production are widely recognised, especially in terms of its environmental benefits. The sector is also supported by specific measures, notably within the framework of the Common Agricultural Policy.

Originally a niche market, organic production now covers a wide range of agricultural and food products, which have often become flagship varieties at large-scale retailers. The organic market in the EU accounts for more than 22 billion euros per year, with demand continuing to grow despite the economic situation of the last few years. This demand is not met by European production alone, and international trading of organic produce, which is also rising sharply, still needs to comply with the same or equivalent production standards between the countries concerned.

This situation itself creates certain immediate challenges associated, for example, with the complexity of regulations, the coexistence of traditional and organic agriculture (the risk of contamination by non-organic varieties) and the need to ensure control and provide guarantees to consumers. Some organic products are now also produced on a large scale, and this process of industrialisation or of bringing organic production into the mainstream raises questions about how we see the sector's future and the societal values it should embody.

In March 2014, the European Commission proposed a review of the EU's general legislative framework for organic production so that the sector could continue to develop sustainably in the EU; this would be achieved by helping farmers convert to organic techniques and by maintaining trust between consumers and producers. In particular, it would involve having increasingly harmonised rules – especially by reducing the current exceptions to the rules and exceptional practices permitted – by reviewing the control and importing systems, and by simplifying the legislative framework and the resulting administrative burdens. Some of the initial reactions to those proposals seemed fairly critical. In particular, the associative movement of the organic farming sector feared that those proposals, unless modified, would actually lead to a decline in organic production in Europe and harm small production units. The initial stances taken by the various Member States diverged.

At a time when the European Parliament, in the early stages of the new parliamentary term, had only just begun its first-reading consideration of the proposed new rules, on 16 December 2014 the Commission announced its intention of withdrawing the proposal if no agreement had been reached on it within six months.

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List of main abbreviations

IFOAM: International Federation of Organic Agriculture Movements

GMO: genetically modified organism

CAP: Common Agricultural Policy

1. The fundamental aspects of organic production

1.1. What is organic production?

Organic production is a form of **agricultural production** that adheres to certain **principles**. Beyond cultivation and animal husbandry activities, the organic-production sector encompasses an entire industry and all those who work in it. It in particular includes the supply of raw materials, their processing to produce foodstuffs, distribution channels (including retailing), and the provision of information to consumers. In the European Union (EU), organic production is **regulated** by governmental authorities, and is always subject to **control and certification** procedures.

A brief history of organic agriculture

Modern-day organic agriculture is the result of the developments made in a number of philosophies that first emerged in several European countries (in particular Germany, the United Kingdom and Switzerland) in the 1920s, before spreading to other countries, especially to France in the 1960s¹. One thing these innovative philosophies, regarded by some commentators as a romantic political challenge to modernity², had in common was opposition to the development of intensive farming, because of the impact it had on the environment and health and because it made farmers dependent on industry.

The sector began to take off in the 1970s, when various organic movements came together under the aegis of IFOAM, the International Federation of Organic Agriculture Movements, established in 1972. The non-profit-making associations and trade groupings gradually put in place guarantees for consumers (through specifications and control systems), and these societal demands were increasingly recognised by governmental authorities. The specifications for organic agriculture and the associated guarantees were gradually incorporated into national legislation. At EU level, the first regulation relating to organic agriculture and labelling of relevant products was passed in 1991. Originally covering only the production of plants³, this regulation aimed to promote and develop the sector within the framework of the internal market while ensuring fair competition.

1.2. Definition

Definitions of organic production may vary, but they generally have a number of elements in common. In 2008, following nearly three years' work, IFOAM agreed on the following common definition (for general use)⁴:

¹ See, for example: '[Histoire de l'agriculture biologique](#)' [History of Organic Agriculture], as summarised on the website of France's Fédération nationale de l'agriculture biologique ([FNAB](#)).

² See, in particular, various items published by Yvan Besson, such as his article '[Une histoire d'exigences: philosophie et agrobiologie](#)'. L'actualité de la pensée des fondateurs de l'agriculture biologique pour son développement contemporain' [A History of Requirements: Philosophy, Agriculture & Biology – The Contemporary Thinking of Organic Agriculture's Founders as Relevant to its Development] (Innovations Agronomiques (2009) 4, p. 329-362) or ([summary](#) of) his 2007 doctoral thesis in Environmental Studies: 'Histoire de l'agriculture biologique: une introduction aux fondateurs; Sir Albert Howard, Rudolf Steiner, le couple Müller et Hans Peter Rusch, Masanobu Fukuoka' [History of Organic Agriculture: an Introduction to the founders, Sir Albert Howard, Rudolf Steiner, Hans Müller and his collaborator Hans Peter Rusch, and Masanobu Fukuoka].

³ See the [Historical Background](#) on the [European Commission's website](#) devoted to organic agriculture.

⁴ Definitions are available in many languages from the corresponding page of IFOAM's website <http://www.ifoam.org/en/organic-landmarks/definition-organic-agriculture>.

Organic Agriculture is a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs⁵ with adverse effects. Organic Agriculture combines tradition, innovation and science to benefit the shared environment and promote fair relationships and a good quality of life for all involved.

This approach is essentially much the same as that decreed by the EU⁶, which specifies:

Organic production is an overall system of farm management and food production that combines best environmental practices, a high level of biodiversity, the preservation of natural resources, the application of high animal welfare standards and a production method in line with the preference of certain consumers for products produced using natural substances and processes. The organic production method thus plays a dual societal role, where it on the one hand provides for a specific market responding to a consumer demand for organic products, and on the other hand delivers public goods contributing to the protection of the environment and animal welfare, as well as to rural development.

1.3. The range of organic production methods and organic products

In the European Union, organic production refers to **agriculture** and **aquaculture**, and also to their live, **raw or converted products**, intended for human consumption or else for cultivation (in the case of seeds) or animal husbandry (in the case of live animals and animal feed). While the harvesting of plants or of wild seaweed can, under certain conditions, also fall under the 'organic' umbrella, products resulting from the hunting or fishing of wild species are not considered to come under that designation.

Non-agricultural products and non-food products (such as hygiene or beauty products, or textiles), as such, are also not considered to come under that designation. Only agricultural ingredients and constituents of such products can, where relevant, be referred to as 'organic'.

1.4. The main principles

At European level, organic production is based on four general principles⁷, namely:

- making use of cultivation and animal husbandry **processes** that **are based on ecological systems** using natural resources which are internal to the system;
- **restricting** the use of **external inputs**;
- **strictly limiting** the use of **chemically synthesised** inputs;
- **adapting**, where necessary, the rules of production to **special situations** (health status, regional differences in climate and local conditions, stages of development and specific husbandry practices).

Organic agriculture should thus make use of cultivation and animal husbandry practices related with the soil (or that conform to the principle of sustainable fishing in the case of aquaculture), use mechanical production methods and **prohibit** the use of **genetically modified organisms** (GMOs) and products derived from GMOs.⁸ When the use of external inputs is necessary, they are limited to those coming from other forms of organic production, natural substances or substances derived from them, and

⁵ Examples are substances applied to the soil or to crops, plant nutrients, and veterinary medicines.

⁶ See, among others, recital 1 to [Council Regulation \(EC\) No 834/2007](#) on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91.

⁷ See Article 4 of Regulation (EC) No 834/2007.

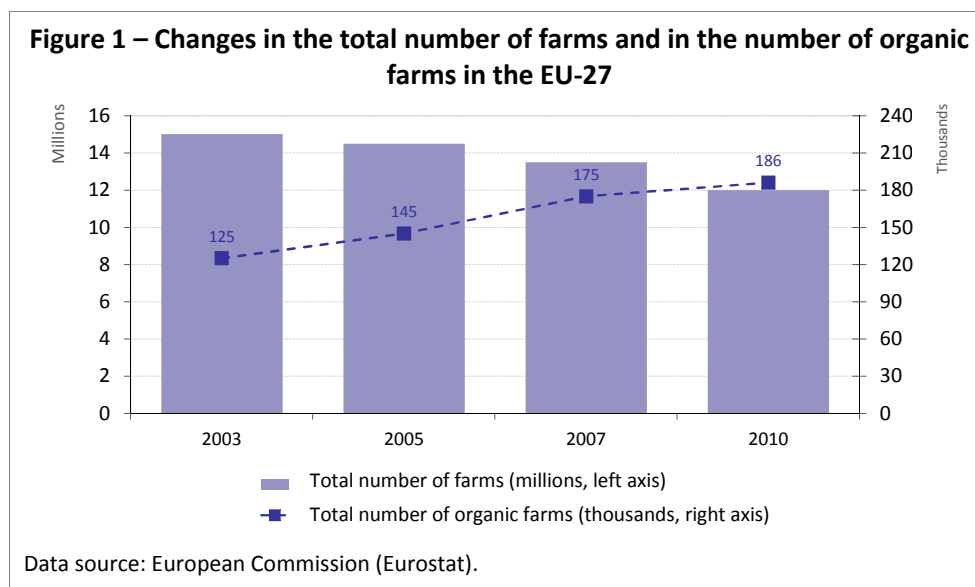
⁸ With the exception of veterinary medicines (and, in particular, vaccines).

sparingly soluble inorganic fertilisers. In exceptional cases where such external inputs are not available, or where their use is likely to have an unacceptable impact on the environment, chemically synthesised inputs may be used as a last resort.

2. A growing sector

2.1. Rapid development of areas used for organic agriculture in the EU

Organic agriculture has grown incessantly in the European Union over the past ten years, with the areas given over to such production increasing by around 500 000 hectares each year on average. Although this type of production still only accounts for 5.4 % of the EU-27's usable agricultural land (as against 3.1 % in 2002), the area cultivated in accordance with organic practices reached 9.6 million hectares in 2011. However, while nearly four-fifths of organically cultivated land in the EU lies in countries that were Member States before 2004 (EU-15), the growth in organic agriculture has been much more pronounced in those countries that have joined since then.⁹ Similarly, while the general trend in Europe's agricultural sector has been downward for some decades (in terms of both the number of firms operating in the sector and people employed in it), the number of organic farms has continued to grow, reaching over 186 000 in 2010 – a figure which nevertheless still only accounts for 1.6 % of the farms in the EU.



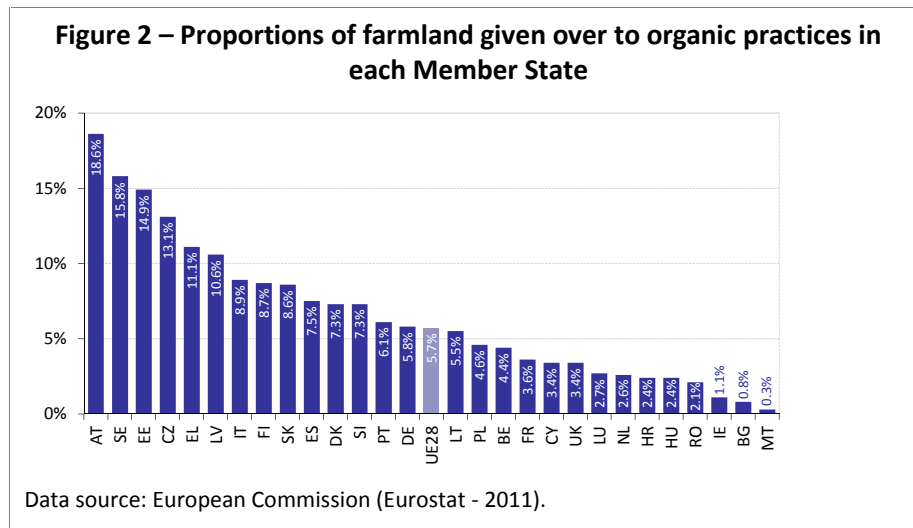
The average land area of an organic farm is greater than that of a conventional farm. The statistics available¹⁰ also show that organic farmers in Europe are younger than their conventional counterparts. In 2010, 61 % of farmers working in organic cultivation or animal husbandry were under the age of 55, compared with only 44 % of conventional farmers.

⁹ Source: European Commission (data from Croatia not included).

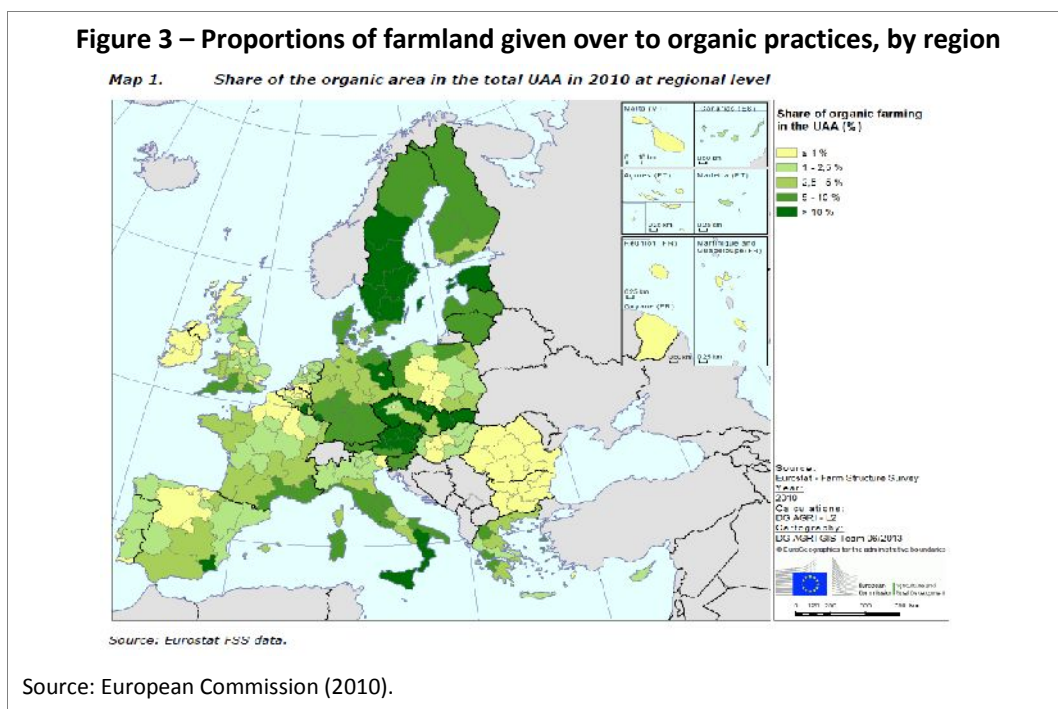
¹⁰ See, in particular [‘Facts and figures on organic agriculture in the European Union’](#); European Commission, October 2013, some of the most important data from which is reproduced in [‘The rapid growth of EU organic farming – Key facts and figures’](#), European Commission, EU Agricultural Markets Briefs No 3, July 2014.

All of the agricultural statistics can also be accessed on the European Commission's website, DG AGRI: [‘EU agriculture – Statistical and economic information – 2013’](#).

However, these average European indicators mask fairly wide discrepancies between the situations in different countries. In 2011, for example, 0.3 % of farmland in Malta was organically cultivated, compared with 19 % in Austria.



There are also large differences between regions. While organic agriculture is particularly well developed in the regions that have retained large areas of permanent pasture and extensive rearing, it is still somewhat rare in certain lowland regions that have witnessed a great intensification of agricultural production. In addition, the financial performance of organic farms, in relation to that of conventional farms, seems to vary greatly.¹¹

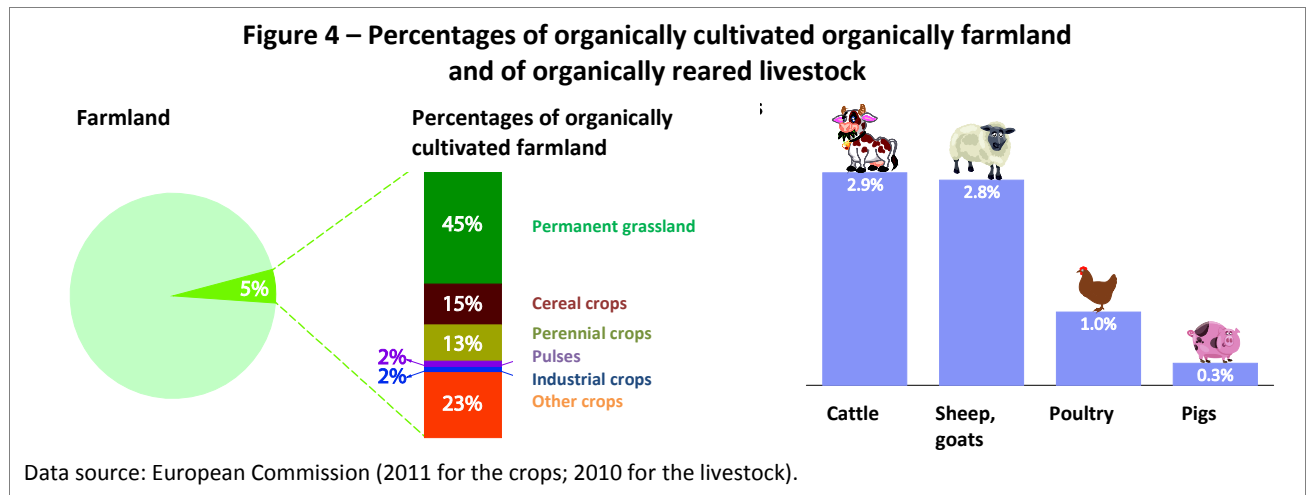


2.2. The main types of production in the EU

The types of organic crops grown vary between the Member States. Taking the EU as a whole, permanent pasture accounts for the largest share of farmland used for organic

¹¹ [‘Organic versus conventional farming, which performs better financially? An overview of organic field crop and milk production in selected Member States’](#), European Commission, Farm Economics Brief No 4, November 2013.

production (45 % of the total)¹², followed by cereal crops (15 % of the farmland given over to organic cultivation) and perennial crops (13 %). Over four-fifths of the land given over to perennial crops is used to produce fruit, which is one of the types of organic produce most in demand. Olives, grapes, walnuts and citrus fruit accordingly account respectively for 31 %, 17 %, 13 % and 2 % of the total land area given over to organic perennial crops (with other fruit crops still accounting for some 21 % of this land area).



In some sectors, the proportion of organic produce has become significant (for instance, organic agriculture accounts for almost a third of permanent grassland and 16 % of the output of pulses). However, when it comes to animal husbandry, the ratio of organic rearing to conventional rearing is still low, although it is growing. For instance, slightly less than 3 % of cattle and small ruminants (sheep and goats) are reared organically. This proportion is around 1 % for poultry, and 0.3 % for pigs.

2.3. Organic agriculture at a global level

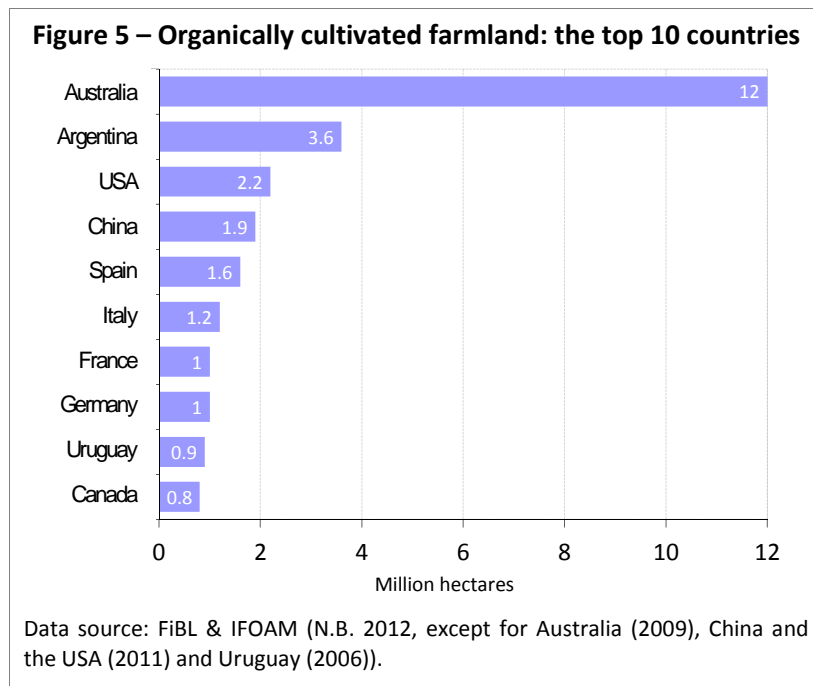
In 2012, organic agriculture was practised in 164 countries around the world. Over 37.5 million hectares of agricultural land were managed in accordance with organic principles, by around 1.9 million farmers.¹³ In terms of the amount of farmland in each continent that is given over to organic agriculture, Europe lies in second place (approximately 11.2 million ha) behind Oceania (12.2 million ha), and a long way in front of Latin America (6.8 million ha), Asia and North America (approximately 3 million ha each), and Africa (1.1 million ha).

However, still less than 1 % of the world's farmland is given over to organic agriculture. Overall, the amount of organic farmland increased very slightly in 2012, reflecting not only the strong and continued growth in Europe and a small rise in Africa as well, but also, in contrast, a fairly marked recent decline in Asia.

Australia has the highest amount of land in the world given over to organic agriculture (12 million hectares, 97 % of which are extensive pasture areas), followed by Argentina and the United States.

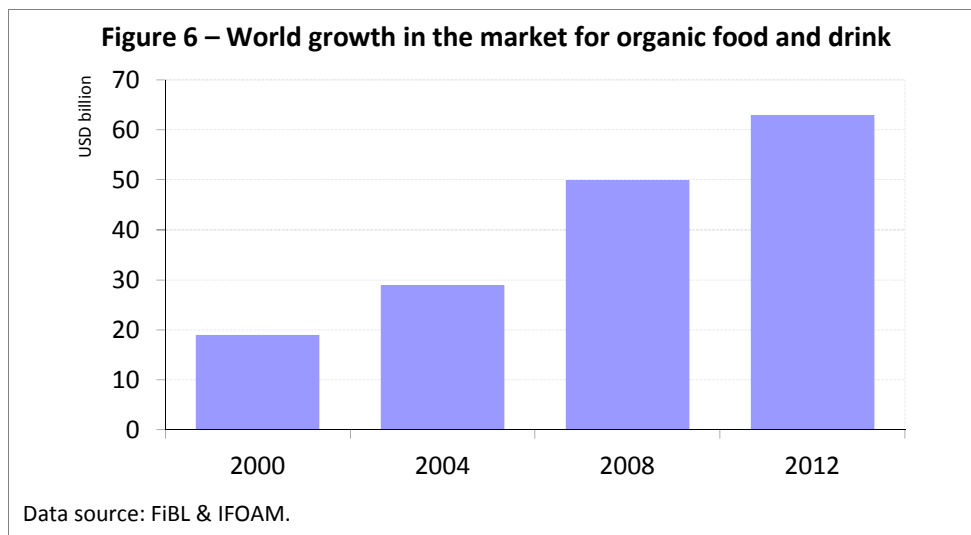
¹² In the terminology usually employed by the CAP, the term 'permanent grassland' actually covers both permanent grassland and permanent pasture (land given over to producing grasses or other herbaceous forage, whether naturally or through cultivation): See, in particular, Article 4 of [Regulation \(EU\) No 1307/2013](#) on direct payments to farmers.

¹³ ['The World of Organic Agriculture. Statistics and Emerging Trends'](#); FiBL and IFOAM, 15th edition, 2014, 304p.



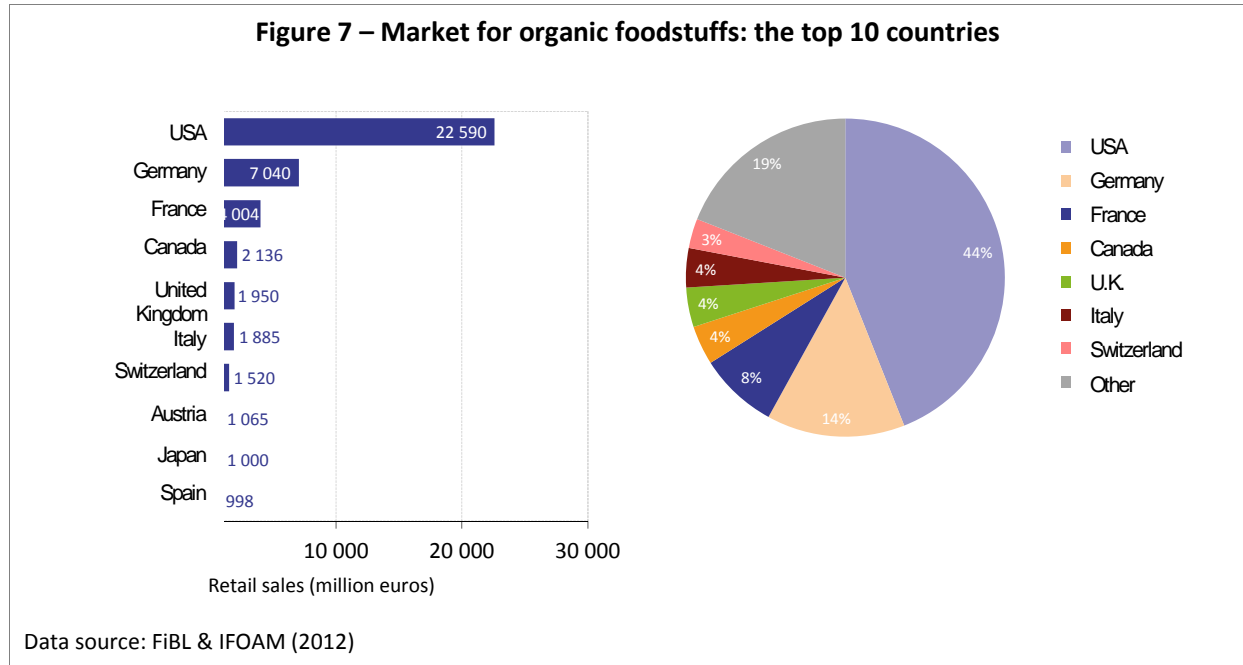
2.4. A market of worldwide importance

When viewed from a global perspective, the market for organic food products is growing strongly. Trade in organic products amounted to less than 15 billion US dollars in 2000, but reached over 60 billion US dollars (around 50 billion euros) 12 years later. The United States and the EU account for the vast majority of current demand. Despite the financial crisis, overall the market has continued to grow, and analysts generally remain confident that this trend will continue, albeit with variations from one country to another.



The data relating to international trade in organic products – subject to mutual recognition between the countries concerned with this description (see section 3.5.) – are still inadequate for giving representative estimates of their exports and imports.

For the EU, according to recent estimates, the **organic market**¹⁴ currently has a value of **greater than 22 billion euros**. Part of this demand arises from the internal market. As an illustration, 90 % of the organic fruit, vegetables and olives produced in Greece, Spain and Portugal go to supply the markets of other Member States, with four countries alone (Germany, France, United Kingdom and Italy) accounting for two-thirds of sales of organic products in the EU.



3. The main aspects of EU policy

The EU's policy on organic agriculture was, naturally, included from the time of its initial development, in 1991, as part of the Common Agricultural Policy. Later, it was extended to include an aquaculture dimension, as part of the Common Fisheries Policy. As for agricultural production in general, there are other policies and instruments that are of interest to and applicable to the organic sector, without being specific to it (such as rules governing environmental protection, animal health, food hygiene and consumer protection).

¹⁴ Sources: IFOAM 2013-2014 (reported in '[Organic farming](#)', EU Rural Review No 18 – European Network for Rural Development, Spring 2014).

The EU's current policy to benefit organic production is based on an **action plan** laid down some 10 years ago¹⁵, and its essential principles are expressed in **Council Regulation (EC) No 834/2007** on organic production.¹⁶ This Regulation envisages that the European Commission, assisted by an advisory group and a formal group of technical consulting experts¹⁷, will adopt certain implementation measures¹⁸ in collaboration with a regulatory committee. Nevertheless, since the Treaty of Lisbon entered into force, the European Parliament has acquired equal legislative power in this area. Although the Parliament, in July 2012, adopted the position at the first reading¹⁹ for harmonising the Regulation with Articles 290 and 291 of the Treaty on the Functioning of the European Union (TFEU), the Council has not since then expressed an opinion on establishing the Commission's delegated and implementing powers.

The major areas of EU legislation on organic production are focused on the regulating of:

- organic **production practices** in the EU, relating to primary production from the ground (cultivation of plants or rearing of land animals, including bees) or from water (cultivation of algae or other aquatic plants, breeding of aquatic animals such as fish and shellfish), and the raw products derived from them.
- the **processing and labelling of products**, and in particular the use of an organic logo to help consumers identify them as such.
- a **certification and guarantee** mechanism for ensuring compliance with these standards.
- the **importing** and marketing of organic products from non EU countries.

European organic agriculture is also supported by instruments forming part of the Common Agricultural Policy. Following its 2013 reform, the CAP is continuing and increasing EU **funding** for 'greener' agriculture.²⁰ In this respect, EU funding for developing and promoting organic aquaculture comes under the European Maritime and Fisheries Fund (EMFF²¹).

¹⁵ Communication from the Commission to the Council and the European Parliament: European Action Plan for Organic Food and Farming ([COM\(2004\) 451](#)).

¹⁶ [Council Regulation \(EC\) No 834/2007](#) on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91 (amended by Regulation (EC) No 967/2008 to postpone compulsory use of the Community logo and Regulation (EU) No 517/2013 by reason of the accession of the Republic of Croatia). This basic Regulation has been complemented by a whole set of more detailed implementation rules with regard to organic production, labelling and control (Commission Regulation (EC) No 889/2008).

¹⁷ More information is available on DG AGRI's website, on the pages specifically devoted to the [Regulatory Committee](#), the [Advisory Group](#) and the [Group of Experts](#).

¹⁸ See, in particular, [Commission Regulation \(EC\) No 889/2008](#), as amended 13 times.

¹⁹ Procedure [2010/0364\(COD\)](#). The European Commission has withdrawn this proposal in response to the introduction of a new draft Regulation on organic production (see section 4).

²⁰ See, for example, DG AGRI's website pages http://ec.europa.eu/agriculture/organic/eu-funding/eu-funding-and-the-new-cap/index_en.htm on EU financing within the framework of the new CAP.

²¹ [Regulation \(EU\) No 508/2014](#) of the European Parliament and of the Council on the European Maritime and Fisheries Fund (see, in particular, Article 53 thereof).

3.1. Regulating organic cultivation and animal-rearing practices

Organic agriculture aims to be **environmentally friendly** and, in particular, to protect the soil and other natural resources.²² In the case of organic animal-rearing, it requires not only the **health of animals** to be monitored, but also a high level of **animal welfare** to be guaranteed, especially with respect to the specific behavioural needs of the animals. Since the use of **chemicals** must be kept as low as possible, these substances may be used only if they have received prior authorisation for organic production purposes. While not forgetting that the use of GMOs is prohibited, these main principles (see section 1.4) also envisage that EU organic specifications **are adapted to the various types of production**, distinguishing between cultivation and animal rearing on the one hand, and soil-based activities and water-based activities on the other. There are also more specific requirements that apply to certain particular types of production (such as producing mushrooms or oysters) or to certain specific products, such as wine²³, for which the organic specifications take account not only of vine cultivation but also the vinification process and oenological practices in general. **Converting** conventional production to organic production, and also **synchronising** these two types of production within a single producing unit, are also regulated fairly closely.

Consequently, the regulatory requirements relating to organic practices may prove to be fairly complex, and their details are not necessarily known to the general public and/or consumers; they may even be unknown to some people who work in the organic wine trade.²⁴ The sections below summarise the essential features of EU provisions in this area.

3.1.1. Agriculture and production of plants

In order for land cultivation practices to fall in line with the EU's legislative provisions, they must:

- not harm the soil (i.e. they must, among other things, maintain its natural fertility, biodiversity and stability, and protect against erosion);
- limit the use of non-renewable resources;
- recycle waste products and by-products from the farm (such as effluents from animal husbandry) as inputs into cultivation, and use only inputs of organic origin, while limiting the use of inputs that come from sources other than the farm itself;
- make use of preventive measures to maintain plant health (such as by using adapted and resistant plants or by protecting the natural predators of pests that attack crops), use mechanical and physical agricultural methods, and carry out crop rotation (including the use of legumes and other 'green' means of fertilising the soil);
- use seeds or other means of ensuring plant propagation in accordance with organic principles.

²² With this in mind, organic production also aims to be in harmony with ecosystems, biodiversity, water resources and landscapes, but the regulatory specifications do not formally cover those aspects.

²³ See [Commission Implementing Regulation \(EU\) No 203/2012](#) amending Regulation (EC) No 889/2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic wine.

²⁴ Initiatives to inform and spread knowledge are taken by both non-profit organisations and governmental authorities. As an example, France's National Federation of Organic Agriculture publishes [sheets on various aspects of the regulations](#), also aimed at those working in the sector, and drawing on both national and European legislation (including any subsequent amendments made thereto).

The use of nitrogenous inorganic fertilisers is prohibited. Certain substances, such as other types of fertiliser, plant protection products or cleaning and disinfection products, may be used only if they have been authorised at EU level or by the Member State for use in organic agriculture²⁵ (see section 3.1.5).

Harvesting wild plants, including seaweed

The gathering of seaweed or other plants from natural environments can fall within the scope of organic production so long as it does not affect the stability of the natural habitat and does nothing to harm protection (or maintenance) of the species in the area in question.

In addition, for land plants, during at least the three-month period prior to harvesting, no improvement may be made to the soil and no other treatment may be given using a substance that has not been specifically authorised for use in organic agriculture.

For the harvesting of seaweed, the area from which it is collected must also be considered to be of high ecological quality (in terms of the Water Framework Directive²⁶) and the water quality must comply with certain hygiene standards (as laid down for shellfish farming, for example; see section 3.1.3).

3.1.2. Rearing of land animals

Organic animal-rearing must be **associated with the soil** and adapted to the site. The animals must have access to areas in the open air, with their density limited in order to provide the soil itself with appropriate protection (avoiding overgrazing, erosion and pollution).

The animals must be reared throughout their lives on organic farms, by trained staff.

The **animals' health** must be protected by giving preference to natural means of defence, and in particular by choosing suitable breeds and rearing practices (in terms of diet, housing, hygiene, etc.). With regard to preventing and treating disease, the use of immunological veterinary medicinal products (notably vaccines) is allowed, and preference should be given to phytotherapy products or homeopathic products. Nevertheless, synthetic chemical allopathic medicinal products (including antibiotics) may be resorted to, under strict conditions, for the immediate treatment of an illness and to prevent the animal from suffering.

Organic animal-rearing also requires ensuring a high level of **animal welfare** by accommodating the needs specific to each species; by reducing any suffering or mutilation, including through the choice of breeds and approach to reproduction (limiting difficult births requiring Caesarean procedures, for example²⁷); by avoiding

²⁵ See Article 16 of Regulation 834/2007 ('Products and substances used in farming and criteria for their authorisation').

²⁶ [Directive 2000/60/EC](#) of the European Parliament and of the Council establishing a framework for Community action in the field of water policy.

²⁷ As an example, the [Walloon \(Belgium\) Government's official Decision of 11 February 2010](#) on the mode of production and the labelling of organic products requires, for a meat-supplying flock or herd, that five years after the conversion of a farm has begun, the number of natural births be, and remain, over 80 % of the total number of births, every year. In addition, the proportion of natural births must already have reached 30 % three years after the conversion has begun. These requirements, in practice, prohibit double-muscled [Belgian Blue cattle](#) (with hypertrophic muscle mass) from being reared in organic farms in Wallonia, as the animals' muscle conformation increases the risk of problems during calving and often requires Caesarean births to be resorted to in order to prevent the calf or the cow from dying.

tying up animals or keeping them in isolation; and by reducing the amount of time they are in transport.

In terms of the animals' **diet**, animal feeds must have been derived from organic agriculture or from natural non-agricultural substances. The feeds must have been produced on the farm itself or come from organic farms in the same region. The animals must also have access to pasture or to roughage. Growth factors and synthetic amino acids are prohibited. Unweaned young mammals are fed on natural milk, preferably from the mother.

Natural methods of **reproduction** should be used wherever possible. While artificial insemination is nevertheless authorised, other artificial methods of reproduction (e.g. cloning and embryo transfer) are prohibited, as are treatments based on hormones or similar substances.

However, certain **less-restrictive reproductive practices** are also **permissible**. In an organically reared herd, for example, the use of a veterinary treatment based on hormones to deal with a reproductive problem in an individual animal is authorised. Organic animal-rearing may also involve the use of feeds coming from a farm that is still undergoing conversion to organic production, or even of non-organic feed ingredients (including additives or processing aids), so long as they are authorised for such purposes. According to the same principle, products for cleaning and disinfecting buildings or other animal-rearing installations must be authorised for organic production purposes (see section 3.1.5).

Apiculture

For the organic rearing of bees, EU requirements provide, in particular, that:

- the hives are sufficiently distant from potential sources of harm for the bees or of contamination for the apiculture products. They must be primarily located in areas of organic cultivation, wild flora or forest, or else in non-organic cultivation areas that have been subject to treatments having only a minor impact on the environment,
- the hives and the other resources used in beekeeping must mainly be made of natural materials,
- the methods used to collect apiculture products must not result in the deaths of bees in the honeycomb.

3.1.3. Aquatic animal-rearing

Most of the non-specific requirements applicable to the practices for organically rearing land animals also apply to the organic rearing of aquatic animals (organic origin of the animals, measures to ensure health and welfare, limiting suffering, choice of breeds, the use of rearing practices that reduce environmental impact, preventing disease, the use of veterinary treatments, use of organic feeds or of products with prior authorisation, etc.).

With regard to reproduction²⁸ for the organic rearing of aquatic animals, artificial methods for inducing polyploidy²⁹, hybridisation, cloning or the production of single-

²⁸ The reproductive physiology of aquatic animals differs greatly between species. The mechanisms that determine sex and produce sexual differentiation, and also the physiological and environmental influences on these processes, vary a lot more between fish species than they do for other vertebrates (mammals, birds and reptiles).

²⁹ In many species, the animals' non-reproducing cells contain an even number of chromosomes (containing the genetic information), each chromosome being present in duplicate. This is the case in

sex groups (other than by manual sorting) are all prohibited. For fish and crustacean feeds, ingredients derived from aquatic animals must come from a sustainable fish-farm (producing sustainable fish or other aquatic species). Except in the case of juvenile animals reared in fish hatcheries or nurseries, the rearing of bivalve molluscs or other species that feed on natural plankton must be carried out in shellfish-producing waters that meet the highest health standards (class A or B) and are within zones of high ecological quality.³⁰

3.1.4. Algal cultivation

The organic cultivation of seaweed must be carried out in coastal areas having a certain level of environmental and health quality (at least equivalent to the quality level required for the areas from which organic wild seaweed is collected – see box in section 3.1.1.). It also requires sustainable practices to be implemented at all stages of production, and prohibits the use of fertilisers.

In the case of algal cultivation in closed installations, care must be taken to ensure that genetic diversity is maintained, by regularly supplementing the cultivated stock with young varieties collected from an environment where they grow wild. In these closed systems, the use of fertilisers is permissible so long as they are of types that have been authorised for this purpose.

3.1.5. Authorisations for the use of non-organic inputs and of chemicals

The European Commission draws up lists of products that may be used in organic production activities (raw materials and non-organic food additives, fertilisers, plant protection products, and products for cleaning and disinfection) to meet specific needs, and in accordance with certain criteria.³¹

Apart from the products featuring in these EU lists that may be used by organic producers, Member States may also authorise additional substances for use in organic agriculture within their own territory.³²

3.1.6. Organic and non-organic production activities in the same farm

As a general rule, an entire farm must be managed in accordance with the rules applicable to organic production. The legislation does, however, also authorise that **only a part** of the farm is **organic**, so long as the farm's production activities are divided

species whose members are diploid. In some cases, the chromosomes may be present in triplicate, or in even higher multiples. These 'polyploids' are not GMOs (as there has not been any modification of the species' genetic inheritance by introducing genes from another species). For instance, many cultivated plants are polyploid. In the animal kingdom, while polyploidy is not viable in all members of a mammalian species, it is possible for certain species of fish and shellfish. There are thus techniques that make it possible to produce triploid aquatic animals (by subjecting [trout](#) eggs to heat shock, or by cross-reproduction between diploid and tetraploid individuals in some [oyster](#) species, for example). The resulting triploid animals have an odd number of chromosomes, and the sterility generally associated with this phenomenon may have advantages in animal-rearing (in term of growth or of availability of products on the market in any season, for example).

³⁰ The health standards required are class A or B, as defined in Annex II of [Regulation \(EC\) No 854/2004](#), and the ecological quality must comply with the specifications given in the Directive on the quality required of shellfish waters ([2006/113/EC](#)) and the Water Framework Directive ([2000/60/EC](#)).

³¹ The lists of authorised products appear in the Annexes of Commission [Regulation \(EC\) No 889/2008](#) laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007.

³² As a result, national guides and other national lists are published, indicating approved plant protection products that may be used in organic agriculture, as is the case, for example, in [France](#) and [Belgium](#).

into distinct units or sites. When it comes to cultivating the soil, this in particular involves the use of different plant varieties, which can easily be told apart. When it comes to rearing land animals on the same farm, the organically reared species need to be different from those reared conventionally and kept in separate enclosures, and as a general rule, the non-organic animals should not have access to organic pastures. When it comes to rearing aquatic animals, it is possible to rear both organically and non-organically the same species in a single establishment, as long as the production locations are separated appropriately.

3.1.7. Use of non-organic plant seeds and non-organic animals for reproduction

As a general rule, seeds (and other types of plant propagation material such as small plants, tubers, etc.) have to be organic. However, when such products are unavailable, **an organic farmer is permitted to use seeds** originating either from a production unit that is in the course of conversion or from **conventional** agriculture, provided that these seeds have not been treated after harvesting with any substance that is prohibited in organic production.³³

Similarly, organic farmers must rear organic animals born on the farm. If necessary, and while it is preferable to introduce new animals from other organic farms, there are also dispensations allowing, **in addition, conventional animals** to be used, particularly for reproductive purposes. However, these animals must be subjected to a period of conversion, which varies according to the species, or even to the type of production.³⁴

3.1.8. Conversion of conventional practices to organic practices

Conversion refers to a change from non-organic agriculture (or aquaculture) to organic agriculture (or aquaculture). During this **transitional period**, the farm must be managed in accordance with all the rules for organic production, but its produce cannot yet be claimed to comply with the organic specifications.

In order for the conversion period to officially begin, compliance with the farm's organic rules must have been recognised (following notification of the organic production activity to the competent authorities, subject to the corresponding control system and an authorisation visit that complies).

The conversion period varies, depending on the types of cultivation and animal-rearing. As an example, the conversion period must be at least two years for annual crops (before sowing) or pasture (before being used as a source of organic pasture or grazing, or to provide organic fodder), and at least three years for perennial crops (such as fruit trees and vines).

In the case of animal-rearing farms, it is permissible, under certain conditions, to simultaneously convert the livestock and the land used to provide food for the animals (generally a two-year conversion period, but with the possibility of a shorter period in some cases, such as open-air production for poultry).

³³ Alternatively, such seeds are allowed provided that they do not come from a plant species that is considered to be adequately available within Europe in organic versions and identified as such in Annex X of [Regulation \(EC\) No 889/2008](#) (the annex still being empty at the time of publication of this report).

³⁴ See, in particular, Article 38 and 38(a) of Regulation No 889/2008 ([consolidated version](#)) in this respect.

Dispensations are also possible in cases where certain non-organic animals are being introduced into a farm, but the animals' products may not be sold as organic before the end of the conversion period (e.g. 10 weeks for poultry and 6 months for cows' milk).

3.2. Processing and organic processed products

In all cases, the **processing of organic products must be kept separate** (whether in time or physically) from the processing of non-organic products. Treating raw materials or processed products with **ionising radiation** is **prohibited**. Also prohibited is the use of substances or methods intended to correct effects or errors in processing or in storage, or to result in mistakes being made about the product's true nature.

In the production of processed **feeds for animals** in organic animal-rearing activities, it is prohibited to mix organic and non-organic varieties of the same raw material, and also to make use of synthetic solvents.

Organic **foodstuffs** for human consumption must be produced mainly from ingredients of agricultural origin (not counting added water and/or salt).³⁵ A non-organic agricultural ingredient may be used only when it has been authorised for that specific purpose.

The use of additives, processing aids, aromas, water, salt, preparations of micro-organisms or of enzymes, trace elements, vitamins, amino acids and/or other micro-nutrients is allowed. However, in order to limit their use, recourse to such ingredients must be essential for specific technical or nutritional reasons. Here too, the use of such ingredients for making organic foodstuffs must have received specific authorisation. Such authorisations are granted only at EU level by the European Commission³⁶ (there being no possibility of additional national lists of substances authorised for processing organic foodstuffs).

3.3. EU organic appellation(s), labelling and logo

A reserved designation for a variety of different products

Those operating in the production and/or marketing of raw or processed agricultural (or fish-farming) products may use the term 'organic' (or variations of that term) for labelling and advertising purposes, but only if those products comply with all the relevant provisions and criteria.

Thus, in the case of processed foodstuffs, at least 95 % (by weight) of the ingredients of agricultural origin must be organic. As organic production prohibits the use of GMOs, the term 'organic' may not be used to denote a product made or derived from a GMO, and also to denote a product whose composition would require it to be labelled as containing GMOs.³⁷ In addition, the use of terminology making reference to an organic designation (e.g. by using a commercial brand) which could mislead consumers is prohibited.

However, if a product complies with the rules of organic production and can therefore make that claim throughout the EU, the 'organic' designation does not have identical effects in the Community's various languages. Depending on the language in question, two other terms may be used to denote 'organic', which literally translate as 'ecological' and 'biological'. In some languages (e.g. German, Latvian and Slovakian), operators may

³⁵ Wine production and yeast production are subject to other specific provisions.

³⁶ See [Commission Regulation \(EC\) No 889/2008](#), and more specifically Annexes VIII and IX thereof.

³⁷ For example, a foodstuff that apparently contains 99 % products of organic agricultural origin but also 1 % of a genetically modified agricultural ingredient may not be designated 'organic' (such a product would actually be [required to be labelled as 'GMO'](#)).

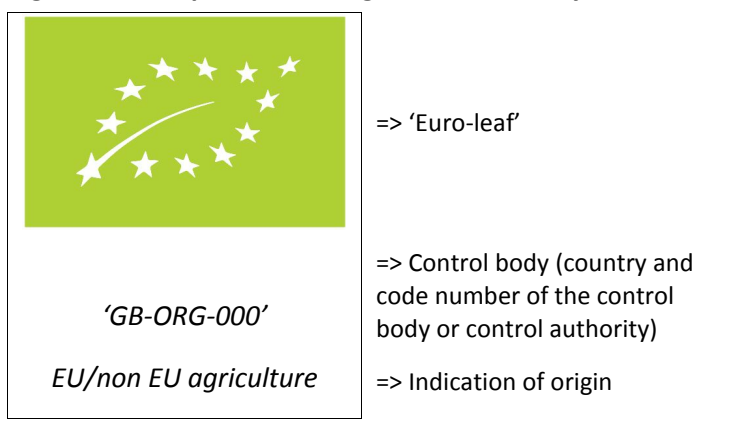
even use more than one of the three words (which literally mean) ‘organic’, ‘biological’ and ‘ecological’, without intending any difference in their meaning.

Mandatory indications and an EU logo

The labelling of a product presented as organic must, in all cases, include the identity of the control body (country and code number).

A single **European Union logo** was officially adopted in March 2010.³⁸ It shows a Euro-leaf symbol (a stylised leaf with its edge being made up of 12 stars, set against a green background), and was familiar to only one EU resident in every four in 2013.³⁹ The logo is now mandatory on the packaging of pre-packed organic foodstuffs. Its use is optional for products imported from non-EU countries. When the EU organic logo is used, the operator must also provide information on where the constituent agricultural materials were produced (EU and/or non-EU agriculture).⁴⁰

Figure 8 – European Union logo and mandatory information



There are also specific provisions applicable for organic labelling of animal feeds, products derived from in-conversion crops, and seeds (or plant propagation products).

A specific, but not exclusive, label

Productions and products that comply with European organic regulations may also optionally be indicated by various types of **additional national or private logos**. However, whenever it also includes the designation ‘organic’ (or something that implies that term), any labelling or comparable optional indication must have an EU organic label associated with it, and the product in question must fulfil the associated requirements.⁴¹

3.4. Guarantee mechanisms – control and certification

Member States must put a control system in place in order to monitor compliance with the provisions applicable to organic production. Although it has to be established

³⁸ Commission Regulation (EU) No 271/2010 of 24 March 2010, amending Regulation (EC) No 889/2008 ([consolidated version](#)) laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 as regards the organic production logo of the European Union.

³⁹ See the [Questions & Answers](#) published by DG AGRI, and the [Special Eurobarometer Agriculture Report](#) of 2013.

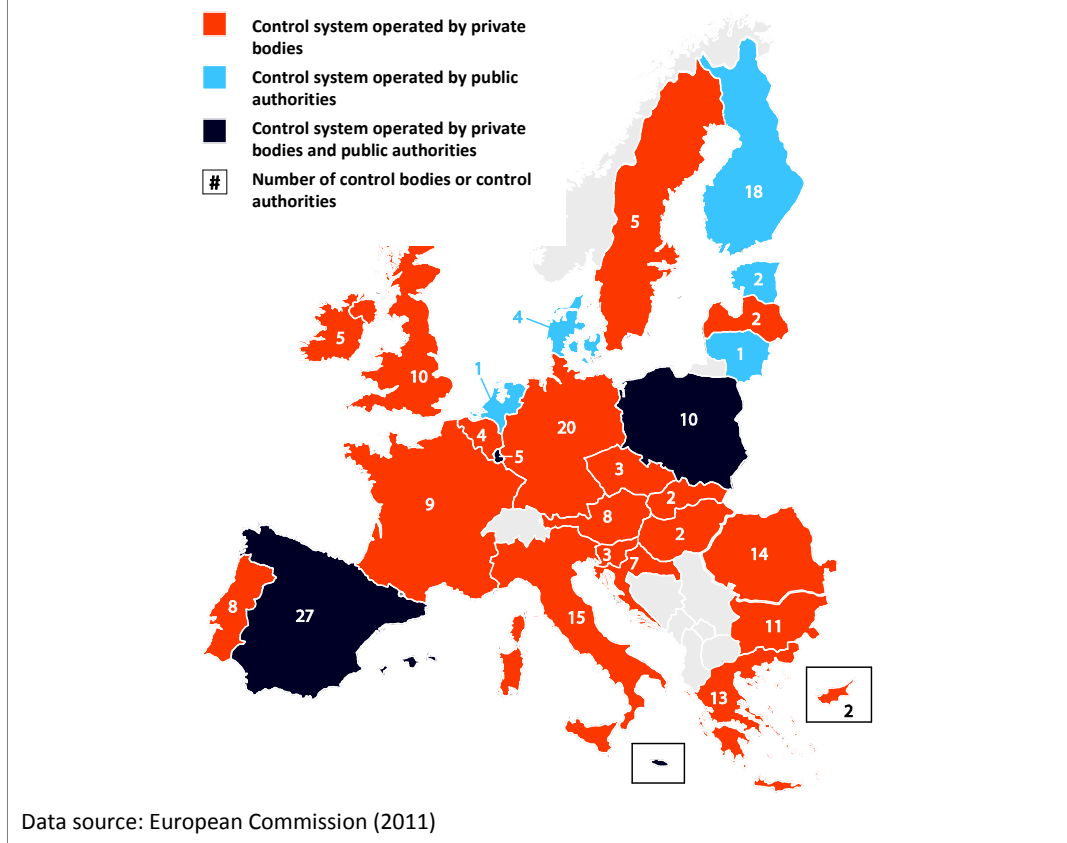
⁴⁰ If all the agricultural ingredients were produced in the same country, the EU mention may be supplemented or replaced by a mention of that country.

⁴¹ See, for example, the [explanations and illustrations](#) relating to the EU label and its use together with the [‘AB’ label](#) – France’s Agriculture Biologique.

on the principle of a risk assessment, the EU legislation also requires that operators' checks are performed at least once a year (except for retailers and wholesalers who sell only pre-packed organic products).

The competent authorities may delegate the control activities to accredited certification bodies, but they must nevertheless carry out certain supervisory activities (verification that the accredited bodies are independent and that their checks are effective, information relating to any irregularities noted being duly returned, etc.).

Figure 9 – Organic production control: systems and numbers of control bodies or control authorities in each Member State



In five of the EU Member States (Denmark, Estonia, Finland, Lithuania and the Netherlands), controls are performed solely by public-sector institutions. In four Member States (Spain, Luxembourg, Malta and Poland), the control systems are a mixture of public- and private-sector institutions. In the other Member States (19 countries), the controls are performed by private-sector institutions.⁴² At the beginning of the current decade, there were around 190 certification bodies in the EU.

3.5. Organic products originating from non-EU countries

Imported products may also be marketed as organic products, if the **production and control standards applicable in the relevant non-EU country** are considered to be **equivalent** to those in the EU on the subject. The European Commission is responsible for recognising the equivalence of a non-EU country's organic production system and verifying that it is duly monitored. In late 2014, the EU had thus concluded equivalence

⁴² Commission staff working document: Impact assessment accompanying the proposal for a regulation of the European Parliament and the Council on organic production and labelling of organic products ([SWD\(2014\) 65 final](#), Part 3/3 – Annex 9).

agreements with more than a dozen non-EU countries (Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, Switzerland, Tunisia, the USA, Norway and Iceland). Imports of these products are accompanied by ad-hoc inspection certificates.

In the absence of recognition that the rules in a given non-EU country are equivalent, the **products** may nevertheless be designated as 'organic' if they are produced and controlled **in accordance with European standards**, provided that the operators can provide documents to support this. The European Commission examines requests submitted for this purpose by the control bodies and control authorities and, where appropriate, accredits them to check and certify the organic products in the non-EU countries concerned. The European Commission is also responsible for supervising the authorities or other organisations thus recognised.⁴³

3.6. A European support policy for organic products

The EU's actions are not limited to defining control and certification standards and rules for organic activities. Recognising the **unique qualities** of these types of production (see box), the Common Agricultural Policy provides financial support for the promotion and development thereof.

Organic: a dimension of European policy in favour of high-quality agricultural products

The promotion of organic **production** is part of a broader policy of the Union favouring [high-quality agricultural products](#).

This quality policy also promotes and protects products with qualities that are linked to their place or method of production:

- **Protected Designation of Origin (PDO)** recognises a special savoir-faire for a product for which all manufacturing steps (production, processing and finishing) take place in a specific geographical area,
- **Indication protected Protec (PGI)** designates a product closely linked to a geographical area in which at least one key manufacturing step takes place,
- the **Traditional Specialities Guaranteed (TSG)** designation recognises the traditional nature of a product, in terms of either its composition or its method of production.

This quality policy also includes a European system for the specific recognition of **agricultural products from outlying regions**.



⁴³ See the DG AGRI website, specifically the pages on [relations with non-EU countries](#) or [recognised control bodies/authorities](#).

Following the most recent amendment of the CAP and its funding⁴⁴ for the 2014-2020 period, farmers who comply with the obligations of the 'Organic Regulation' (No 834/2007) may receive **direct EU subsidies**⁴⁵, especially as regards the ecological component of those subsidies (payments for climate- or environmentally-friendly agricultural practices or 'green measures').

Moreover, the **European Agricultural Fund for Rural Development** (EAFRD⁴⁶) promotes organic agriculture not only by supporting advisory services or through collective and cooperative actions, for example, but also through aid measures that favour conversion to these organic production methods. In order to avoid double funding, Member States are furthermore exempt from having to establish other selection criteria for subsidised projects (such as criteria intended to guarantee equality of treatment among applicants) when measures linked to organic agriculture are involved.

The new **Common Market Organisation** (CMO)⁴⁷ strengthens and reinforces the possible role of producer organisations and interbranch organisations so that any action aimed at defending, protecting and promoting organic agriculture (as well as designations of origin, quality labels and geographical indications) can be taken. The implementation of operational programmes in the fruit and vegetable sector⁴⁸, which include actions that benefit organic agriculture (or, more broadly, actions that benefit the environment), may also receive financial support from the EU.

While organic production activities 'linked to the earth' may benefit from the funding instruments of the Common Agricultural Policy (CAP), organic production activities 'linked to the water' may benefit from those of the **Common Fisheries Policy** (CFP). Consequently, the European Maritime and Fisheries Fund (EMFF)⁴⁹ allows support to be provided for converting to organic aquaculture, marketing such products and investing in the processing thereof.

In addition to the funding instruments of the CAP and the CFP, the EU also contributes to **research and innovation** initiatives in the organic production sector, within the framework of the 'Horizon 2020' programme. Representatives from the sector and from civil society are grouped under the aegis of a technology platform dedicated to organic production, which allows them to play a pivotal role in identifying research needs and priorities.⁵⁰

⁴⁴ See specifically the page on CAP [funding](#) of the DG AGRI website, or the '[guide on support opportunities for organic producers in Europe](#)', published in December 2014.

⁴⁵ [Regulation \(EU\) No 1307/2013](#) of the EP and of the Council establishing rules for direct payments to farmers under support schemes within the framework of the common agricultural policy (see Article 43).

⁴⁶ [Regulation \(EU\) No 1305/2013](#) of the EP and of the Council on support for rural development by the European Agricultural Fund for Rural Development (EAFRD) (specifically Article 29 thereof).

⁴⁷ [Regulation \(EU\) No 1308/2013](#) of the EP and of the Council establishing a common organisation of the markets in agricultural products.

⁴⁸ See specifically the page on the [fruits and vegetables](#) scheme of the DG AGRI website.

⁴⁹ [Regulation \(EU\) No 508/2014](#) of the EP and of the Council on the European Maritime and Fisheries Fund (see, specifically, Articles 53, 68 and 69).

⁵⁰ See the essential elements on the '[Horizon 2020](#)' site of the Commission and on the website dedicated to the technology platform '[TP organics](#)'.

European Court of Auditors Special Report No 9/2012: failing control procedures

In 2012, the European Court of Auditors published an audit report⁵¹ on the performance of the control system governing the production of organic products, which focused, among other things, on how those responsibilities are performed at different levels of power and intervention, and how the regimes for importing organic products are managed.

Observing that the European Commission has not performed any audit of the Member States' control systems for ten years, the Court also noted a lack of supervision on the part of the competent authorities at national level, and consequently a failure of certain control bodies. The competent authorities in the Member States are no longer capable of ensuring full traceability of organic products in their territories, and even less so when it comes to products originating from other countries. The Court likewise reported weaknesses in the system of various regimes for importing organic products into the EU. This audit led the Court to recommend, among other things, that Member States tighten their supervision over their respective control bodies, that information be better shared between competent authorities at all levels, and that more controls be performed by different operators in the sector. The Commission should also step up its surveillance of national authorities and improve the supervision of non-EU countries recognised as equivalent in terms of organic production and whose products may be imported as such into the EU.

In its resolution⁵² of April 2013 on the Court of Auditors' special reports, the European Parliament in particular recalls that it 'has always supported organic farming and will continue to do so'. It 'stresses the importance of providing sufficient assurance that the system is operating effectively and that it ensures that consumer confidence is not undermined', and it asks the Commission 'to bring forward initiatives and regulatory proposals aiming to ensure that all the weaknesses pointed out by Special Report No 9/2012 are remedied by the end of 2013'.

In response to these criticisms and recommendations, the European Commission began by revising and strengthening certain rules on the organic production control system, particularly with regard to the sharing of information throughout the sector, the supervision of control bodies, and even the establishment of sanctions.⁵³ In May 2013, it also proposed a revision of the regulation on official controls in the food and feed sectors (2013/0140(COD)). In this regard, in its first reading opinion of April 2014, the European considered that official controls should certify compliance with the procedures applicable to organic production⁵⁴. In its March 2014 proposal (see section 4.2), the Commission proposed a new legislative framework for organic production, which also covers control and the import system.

4. The future of the organic sector

4.1. Current and future challenges

4.1.1. Some important fundamental questions

The **coexistence of conventional** agriculture (including the biotechnology dimension) with **organic** agriculture involves several major challenges, notably those linked to the risks of contamination of organic products by synthetic pesticides or genetically

⁵¹ See [Special Report No 9/2012](#) and the [accompanying press release](#).

⁵² Resolution [P7_TA\(2013\)0123](#) of 17 April 2013 on the Court of Auditors' special reports in the context of the 2011 Commission discharge.

⁵³ Commission [Regulation \(EU\) No 392/2013](#).

⁵⁴ Procedure [2013/0140\(COD\)](#) and Resolution [T7-0380/2014](#).

modified organisms (GMOs) – these being two key elements that are prohibited in the organic sector.

Considering that **GMOs** pose major environmental and economic risks and an ‘unprecedented threat to the biosphere’, IFOAM⁵⁵ advocates a total ban on GMOs in agriculture, which would be the only sure-fire way of preventing contaminations by GMOs. However, in order to take the current situation into account, IFOAM stresses the need for GMO-based products to be labelled as such and for the risk of inadvertent cross-contamination by GMOs to be reduced (by implementing buffer zones, for example). It also feels that this risk should not prejudice the certification of organic agriculture as a production method rather than as a guarantee of the final product. Organic farmers should not have to prove that their crops are not contaminated by traces of GMOs or pesticides that they themselves did not use, and the ‘polluters’ should be held liable for any contaminations of organic products. However, IFOAM does not believe that acceptable genetic contamination threshold values should be defined, nor is it in favour of mandatory regulatory testing of organic products in this respect. Not only would the setting of such contamination limits be arbitrary, but above all it would not be in keeping with the very principles of organic agriculture.

The coexistence of genetically modified crops with other crops has been the subject of numerous political and technical developments in the EU⁵⁶ for some time. This issue of coexistence and the risks of contamination by GMOs was also a motivating factor in the 2010 proposal of the Commission to review the regulatory framework of approvals to grow transgenic plants in the territory of the Member States, a proposal on which the European Parliament gave a second reading opinion pursuant to ordinary legislative procedure on 13 January 2015.⁵⁷

The obtaining of organically produced **seeds and plant propagation material** is another example of the challenges facing organic agriculture. To enhance agricultural diversity and better adapt crops to local conditions, heirloom varieties or ‘on-farm’⁵⁸ products are frequently in demand in the organic sector. The need of being organic notwithstanding, however, these types of seeds are not necessarily available via the conventional seed producer route. Moreover, the production and distribution thereof may not always comply with EU regulatory requirements, according to which seeds must be approved and registered in a national (or EU) registry once certain qualities of distinctiveness, uniformity, and stability of the varieties in question have been demonstrated. In 2013, the European Commission proposed to review the legislative provisions on the marketing of seeds⁵⁹, a proposal rejected by the European Parliament at first reading and withdrawn by the Commission at the end of 2014.⁶⁰

⁵⁵ See [IFOAM](#): position on [genetic engineering and GMOs](#).

⁵⁶ See, for example, the [DG AGRI](#) web page of the European Commission dedicated to the issue of the coexistence of GMOs and non-GMOs.

⁵⁷ See Procedure File [2010/0208\(COD\)](#). The [notice](#) of a principle agreement between the European Parliament and the Council in the beginning of December 2014 notwithstanding, in its [2015 Work Programme](#), the European Commission plans to review the decision-making process regarding GMOs.

⁵⁸ See in particular [IFOAM](#): position on the use of [seeds and plant propagation material in organic agriculture](#).

⁵⁹ See for example: ‘[Seeds and other plant reproductive material – Towards new EU rules](#)’, Briefing of the Library of the European Parliament, June 2013.

⁶⁰ See Procedure [2013/0137\(COD\)](#) and Annex II of the Communication from the Commission on its 2015 Work Programme.

4.1.2. Principles that must also be expressed in the details

The implementation of the fundamental principles of organic production also requires them to be expressed in more detailed technical standards. In this regard, one of the principles of organic production as defined by the EU provides in particular for the production rules to adapt to special situations, should the need arise (see also section 1.4).

The EU has thus defined specific rules for certain types of animal husbandry, e.g. for bees and poultry (with standards that may even vary by species or gender, as in the case of ducks, for example). At the present time, there are no common specific rules applying to other types of production. This is the case, among others, for rearing ostriches or rearing snails, for which organic farmers must refer to a list of specifications (if one exists) established on a national or even regional level.⁶¹

Moreover, the definition of detailed rules on crop-growing or animal husbandry practices, or the concrete application of organic principles to certain forms of production, may be subject to discussion. As an illustration, the EU defined a list of organic specifications specific to aquaculture operations in 2009.⁶² However, certain production methods are still a source of debate: in May 2014, IFOAM launched a global public consultation on what 'organic' should mean for aquaculture.⁶³ Referring to the fact that many species reared in aquaculture systems are carnivorous but that their food (which mostly comes from fishery products) may not be organic, IFOAM raised the question as to whether the concept of organic production can truly apply to such aquaculture systems.

Inquiries of this nature conducted by associations linked to the sector can be considered as one of the reflections of the evolving nature of the organic concept and of the diversity of possible trends and points of view in this field, in a context where organic agriculture itself has become a benchmark on the market and where conventional agriculture continues to transform.

4.1.3. Diverse visions of the future of the organic sector

Organic products are today no longer seen as a niche market. Even though they account for a low proportion of total EU agricultural production, they nevertheless represent a European market worth more than EUR 22 billion per year, which over the last few years has been growing steadily at a rate of around 8 % per year. In addition, the days of organic products only being available at speciality shops have long gone; they have now become flagship products for large-scale retailers and online distributors.

For example, according to a study of the performances of organic agriculture published in 2013 by the French national agricultural research institute (INRA)⁶⁴, half of the purchases of products originating from organic agriculture by French people were

⁶¹ As in [France](#) or in [Wallonia](#), for example.

⁶² [Regulation \(EC\) No 710/2009](#) laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007, as regards laying down detailed rules on organic aquaculture animal and seaweed production.

⁶³ '[How does the organic movement define organic aquaculture?](#)', IFOAM online [consultation](#) questionnaire, from 2 May to 2 July 2014.

⁶⁴ 'Vers des agricultures à hautes performances. [Volume 1 – Analyse des performances de l'agriculture biologique](#)' [Towards high-performance agriculture. Volume 1 – Analysis of the performances of organic agriculture], Guyomard H., (under the direction of the) INRA, September 2013.

made in supermarkets, whereas direct sales accounted for only 11 % of such purchases. Although both segments have grown over the last five years, the growth rate recorded for supermarket sales has been more pronounced than that for direct sales. However, the growth rate of supermarket sales is starting to slow down (it was 39 % in 2008 and only 14 % in 2011), whereas that of direct sales is oscillating at around 8-9 %.

This evolution of the market for adapting to a demand that requires supplies on a regular basis and in greater volumes, the development of long distribution channels, as well as the diversification of purchasers and places for purchasing products originating from organic agriculture, led the authors of this study to conclude that this *'conventionalisation of organic agriculture is already a reality'* in the processing, distribution and consumption stages. However, the authors also underline the very real nature of the fears that this conventionalisation of organic agriculture is raising, especially in the production stage. Some organic farmers are simplifying and gearing their agronomic and animal husbandry practices towards a greater level of standardisation and towards the search for greater productivity from the land and labour, with the aim of minimising production costs as well. Such an adaptation can thus have the effect of reducing the expected environmental and territorial benefits of the organic sector.

Organic agriculture benefiting small-scale farmers or large-scale financiers - examples in Romania

According to Commission statistics⁶⁵, Romania (like other Member States that have joined the EU since 2004) has seen a marked increase in the amount of its farmland given over to statistic organic agriculture (from 131 500 ha in 2007 to 230 000 ha in 2011).⁶⁶

However, there is more than one side to the reality of this growth. For instance, certain press articles⁶⁷ highlight the favourable development of organic agriculture and its advantages for numerous Romanian small-scale farmers, even though there are still certain challenges, particularly in terms of traceability.

On the other hand, an investigative television report on the industrialisation of the organic sector and of organic practices broadcast in June 2014 refers to certain examples in Romania in order to highlight and condemn a system in which investment fund managers buy up large areas of agricultural land at a low price in order to exploit them organically on a large scale, without any actual control, and may, as a result, benefit from the increased availability of EU financial support.⁶⁸

In their 2014 report on trends in organic agriculture, the Swiss Research Institute of Organic Agriculture (FiBL) and IFOAM stressed, among other conclusions, that the organic sector is largely viewed as a success story in the international agrifood industry, and that possibilities for further growth will be pursued. Nevertheless, certain challenges still need to be addressed, particularly in terms of a more balanced and regionalised geographical approach in organic production. Citing the example of raw

⁶⁵ ['Facts and figures on organic agriculture in the European Union'](#); European Commission, 2013.

⁶⁶ An asset highlighted by Dacian Cioloș, the European Commissioner for Agriculture during the 2009-2014 period, and mentioned in particular by Romanian representatives in non-EU countries such as [Switzerland](#) or [Canada](#).

⁶⁷ See for example the press article ['Le bel avenir bio de l'agriculture roumaine'](#) [The promising organic future of Romanian agriculture] of 18 August 2013, which also mentions the 'bio Romania' association.

⁶⁸ See ['Produire bio - Un business comme les autres?'](#) [Organic production – a business just like any other?]; television report broadcast on ARTE on 3 June 2014.

products such as organic rice, soybeans, fruit or spices imported into Europe from Asia and then processed into finished products to be exported back to Asian markets, the authors feel that this **imbalance linked to international trade** must be corrected, not only because of its environmental footprint but also because of the extra costs linked to transport and logistics for the consumer.⁶⁹

The industrialisation of the organic sector and its alignment with large market trade practices can also be seen through the **increased proliferation of events** associated therewith, such as large trade shows that attract stakeholders from the entire sector, particularly the processing, trade and distribution branches. These commercial events also serve as platforms for promoting ideas and **driving market trends**. The 'Organic 3.0'⁷⁰, published in January 2014 in partnership with BIOFACH – the 'world's leading trade fair for organic foods' – is an example of this.⁷¹ This analysis of the trend and potential of the future evolution of the organic sector suggests certain concepts redefined by their promoters, and envisages needs and possibilities for the sector to adapt in response to certain major social trends (such as individualism, connectivity, health, globalisation). As regards the competitive development of the organic sector, it proposes, among other things, a reorientation of its overall approach, which has thus far been focused on modes of production but should instead be centred more on the needs of consumers, which would be achieved by exploiting other key values such as those of regional or traditional production or by getting involved in the more general 'lifestyle, nutrition and health' debate. Some may feel that this study and the context in which it is being presented and discussed are an illustration of the 'appropriation' phenomenon described by other authors, which consists of the 'mechanism by which the downstream agrifood industry (slaughterhouses-butchers-distributors), a newcomer to the organic sector, is reconfiguring the processes of agricultural production in order to reduce them to an agribusiness input'.⁷²

In terms of values linked to organic production, it should be recalled that the EU legislative framework establishes a least common denominator for organic production, focused essentially on the environmental (and zoo technical) dimensions of agricultural and aquacultural practices. Also possible is the voluntary use of other societal claims or references such as those linked to the closeness of production and consumption, to fair trade, to the recognised origin or to the provenance of products. Such values and their criteria do not enter into the certification criteria of organic production. However, the **growing number of labels** or the concomitance of other claims (such as those linked to health) may increase the risks of misleading or confusing those consumers who are insufficiently informed, and also give rise to risks of 'diluting' the value of the organic sector or loss of confidence in the significance thereof.⁷³

⁶⁹ ['The World of Organic Agriculture. Statistics and Emerging Trends'](#) published by FiBL and IFOAM in 2014: see in particular the chapter on the global market for organic food and drink and the section therein entitled 'Conclusions and future growth' (pp. 130-131).

⁷⁰ ['Organic 3.0 - Trend and potential analysis of the future of organics'](#), BIOFACH, January 2014.

⁷¹ This sector-wide debate was launched during the 2014 BIOFACH trade fair and will be pursued further during the [2015 BIOFACH Congress](#).

⁷² ['Le Blanc Bleu Belge est-il soluble dans le bio?'](#), [Are Belgian Blue cattle feasible in organic production?] P. Stassart and D. Jamar, 2005, Nature, Sciences, société.

⁷³ In this respect, certain analysts feel that as far as environmental claims are concerned, only the organic agriculture label 'reflecting a coherent and exhaustive set of different factors' should be authorised (see specifically: ['La réforme de la PAC au-delà de 2013 – Une vision à plus long terme'](#)

Besides the increased risks of fraud due to the discrepancy between demand and actual production possibilities, this frenzy on the market for organic (or 'green'⁷⁴) products may also lead to this claim being **misused** for non-agricultural or non-food products, or if not, at least to requests to extend the organic label to other products such as textiles, clothing or cosmetic and hygiene products.

A proposal to revise the EU framework of organic production presented by the European Commission in March 2014 is being discussed in this context of diverse challenges and visions for the future of organic agriculture.

4.2. Towards a new European framework

4.2.1. Preparing proposals

The development of the European Commission initiative for a revision of the legislative framework of the organic sector and of the action plan for supporting this type of production has been marked by several key steps.

Already aware of the shortcomings of the control system for organic production noted by the Court of Auditors and disclosed in a special audit report in June 2012 (see also the box, section 3.6), in May 2012 the Commission presented its report on the implementation of Regulation (EC) No 834/2007 to the European Parliament and to the Council, a process by which it hoped to start a discussion on numerous subjects, including improvement of the control systems but also the coexistence of organic production and that using GMOs, the import regime, and the simplification of the general legislative framework.⁷⁵

The Commission also carried out a very large-scale public consultation as part of this appraisal process.⁷⁶ In addition to several special hearings with the principal stakeholders in the organic sector and meetings with the organic advisory group, the Commission also received more than 45 000 voluntary contributions in response to a public consultation launched on the Internet, a very high number that was deemed to reflect how important this subject is to European citizens.⁷⁷ As part of preparing for its appraisal of the impact of a revision of the EU legislative framework, the Commission also ordered an external appraisal of the legislation on organic production⁷⁸ to be performed. In this study published in November 2013, the authors presented their recommendations for a possible revision of the scope of this legislation, rules of production, control, imports, etc. According to an analysis carried out by of the European Parliamentary Services concerning the various available appraisals on the implementation of the legislation on organic production and labelling, this external

[CAP reform beyond 2013 – A longer term vision], JC. Bureau and LP Mahé, 2008, 'Notre Europe' think tank).

⁷⁴ '[Attitudes of Europeans towards building the single market for green products](#)', European Commission, Flash Eurobarometer 367, July 2013.

⁷⁵ Report from the Commission to the European Parliament and the Council on the application of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products ([COM\(2012\) 212](#)) – see also the web [page](#) of the DG AGRI site dedicated to this report.

⁷⁶ See also the [roadmap](#) of this initiative, which was formalised in September 2012.

⁷⁷ This consultation process brought together a vast array of documents and contributions, which can be accessed as full text [versions](#) or in [summary form](#) on a specific web [page](#) of the DG AGRI.

⁷⁸ '[EU legislation on Organic Production and Labelling](#)', Study report, Thünen Institute of Farm Economics, November 2013, 370 p. available in its entirety or by chapters on the [web page](#) of the DG AGRI site.

study would have been more complete if it had covered supplementary dimensions such as possible contradictions between the legislation for the organic sector and other EU legislation or policies, or if it had given greater consideration to certain stakeholders, especially exporters of organic products or consumer associations.⁷⁹

4.2.2. *The March 2014 proposals of the European Commission in brief*

The issues that the Commission is seeking to address with its proposal of a new legal framework and an action plan for the future of organic production in the EU⁸⁰ are based on the following observation: although the European organic market quadrupled between 1999 and 2011, the amount of farmland in the EU given over to organic production merely doubled from 2000 to 2010, and the shortfall must be covered by imports. This situation not only represents lost opportunities for European farmers, but also entails the risk of holding back the development of the organic market and resulting in a loss of the environmental benefits unique to this type of production.

The Commission identified four main types of **challenges**, which it took into account in its appraisal:

- The **conversion** of forms of conventional agriculture to organic production methods is still **inadequate**.
- Consumer **confidence**, a key factor in the development of the organic products market, **is at risk** of declining. The rules and the system in general are being undermined, in terms of their credibility, by cases of fraud, shortcomings in the control system or in the import regime, and unclear exemptions or provisions of the legislation. Certain current practices, although compatible with the specifications of the organic sector, are not always in keeping with its objectives of high levels of environmental protection or animal welfare. The development of private certifications leads to a multiplicity of labels and logos in competition with each other (and with the EU scheme) and is a source of confusion for consumers.
- The system does not lead to **fair competition** among the farmers, and the **single market** is not fully operational due to the complexity of the provisions linked to the coexistence with conventional agriculture or different levels of implementation by the national authorities (for example in terms of granting derogation schemes, of controls and sanctions, or of the recognition of competing certification bodies), among other things.
- The **legislation is complex** and generates a considerable amount of constraints and **red tape**, not to mention the disproportionate cost of organic certification for small-scale farms.

Based on this impact assessment, which itself was the subject of an initial appraisal by the European Parliamentary Services⁸¹, the Commission **proposed** to review the

⁷⁹ [EU legislation on Organic Production and Labelling – Implementation Appraisal](#), Briefing of the European Parliamentary Research Service, PE 536.328v02-00, October 2014.

⁸⁰ See the [web page](#) dedicated to this new initiative on the DG AGRI site, which also contains links to the legislative proposal ([COM\(2014\) 180](#)), the action plan ([COM\(2014\) 179](#)), the impact assessment report ([SWD\(2014\) 65](#)) and its executive summary ([SWD\(2014\) 66](#)), along with the [press release](#), the 'questions and answers' [information sheet](#), [background memo](#), and the [citizens' summary](#).

⁸¹ Organic production and labelling of organic products - [Initial appraisal of a European Commission Impact Assessment](#), Briefing of the European Parliamentary Research Service (EPRS), EP 528.799, July 2014. In short, this appraisal concluded that the Commission's impact assessment makes a reasonable case for the need to change the system, but that the credibility of some of the

regulatory framework in order to remove the obstacles to the development of organic agriculture and to maintain the confidence of both consumers and farmers in the system. In particular:

- to increase the harmonisation of the organic production rules (in particular to **eliminate certain current exemptions or derogations** and to ban the concomitance of organic and conventional production on the same production site) while still favouring access to the organic label for small farmers by possibly introducing a group certification regime. Unless they are small and medium-sized enterprises, operators downstream of primary production would be required to implement systems for improving their environmental performance;
- to revise the **control** system, particularly by basing it more on risk analyses and by extending the mandatory controls to retail businesses, but also by defining measures and responsibilities regarding the presence of unauthorised substances in organic products. Moreover, the organic sector controls would become part of the general framework of the official controls of the agrifood sector, the legislative framework of which is currently under discussion;⁸²
- to amend the provisions on international exchanges, in particular by initiating a system of simple compliance with EU rules while still keeping the already accepted equivalence systems in place (see section 3.5).

In its annexes, this proposal for a new regulation (which would repeal the current regulation) also summarises the detailed rules of specific forms of production, the future amendment of which would be part of the **powers delegated** to the Commission.⁸³

Along with its legislative proposal, the Commission included an action plan⁸⁴ focused on three priority domains, namely to increase the competitiveness of organic producers (by bolstering research and innovation, for example), to increase consumer confidence (through electronic certification and better fraud prevention, for example), and to reinforce the external dimension of the EU organic production scheme (e.g. by exploring the possibility of a multilateral agreement and greater convergence of the standards applied by the main partners of the organic sector on an international level).

4.2.3. *Could initial critical reactions bring the debate to an early end?*

The initial reactions of various **stakeholders** were consistent with the logic of the values and interests that they represent. As an example, the day after the Commission presented its proposal, Copa-Cogeca⁸⁵ highlighted the need for farmers to be able to

assumptions made and conclusions drawn is undermined by a lack of appropriate quantitative data to back them up.

⁸² Procedure [2013/0140\(COD\)](#).

⁸³ In 2010, the Commission presented a proposal for aligning the organic production regulation to the provisions of the Treaty of Lisbon in matters of executive powers and delegated powers (Procedure [2010/0364\(COD\)](#)). The Council did not rule on the EP's position at first reading, and when drawing up its [2015 Work Programme \(Annex II\)](#), the Commission decided to withdraw this 'Lisbonisation' proposal since these measures are already integrated in its proposal for the general revision of the organic legislation, which was presented in March 2014.

⁸⁴ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions – Action plan for the future of Organic Production in the European Union, [COM\(2014\) 179 final](#) of 24 March 2014.

⁸⁵ [Copa-Cogeca](#) brings together farmers and their cooperatives on a European level ([press release](#) of March 2014).

(continue to) convert to organic practices gradually, and that organic farmers should not have to bear the costs of accidental contamination or residue analysis. Eurogroup For Animals⁸⁶ felt that by retaining the shortcomings of the current regulation in the new legislative framework, the proposal failed in its objective of protecting animal welfare. In terms of the proposal as a whole, some reactions even seemed rather negative. The European branch of IFOAM thus⁸⁷ '*rejected the Commission's proposal in its current form, unless substantially changed*'. It believed that the proposal fell short on a good many points and that it would lead to a decline of organic production in Europe, in particular at the expense of small organic farms and businesses, and less developed regions.

Although⁸⁸ the **Council** had called on the Member States and the Commission to '*develop the organic production sector at an ambitious level by reviewing the current legal framework...*' in conclusions that it unanimously adopted in 2013, the press reported ardent criticisms expressed by various Ministers for Agriculture regarding this proposal for a new regulation. For example, many of them demanded that the current derogations be kept or that the delegated powers be restricted.⁸⁹

In its position statements in past years, the **European Parliament** has reiterated its support of organic production methods, and has underlined the need to ensure that the system is operating effectively and that consumer confidence is maintained (see the box on the Court of Auditors' Special Report on organic agriculture and the EP Resolution of 2013 on the Court of Auditors' Special Reports⁹⁰). The Commission for Agriculture and Rural Development has been assigned the task of conducting a detailed review of the new proposals presented by the Commission.⁹¹ This activity has started with the new legislature, and the initial discussions regarding the proposal of the Commission⁹² have also been criticised. However, this legislative process could be completed early, even though the European Commission has announced its intention (which it gave in its 2015 Work Programme⁹³ and on which the European Parliament did not rule during its first plenary session of 2015) of withdrawing its proposal of a new regulatory framework if no agreement is reached on it within six months.

⁸⁶ An association that campaigns for the rights of animals ([press release](#) of October 2014).

⁸⁷ See in particular the IFOAM EU press release of 7 May 2014 [press](#) in December 2014.

⁸⁸ Organic Farming: Application of the regulatory framework and development of the sector - draft conclusions of the Council ([8906/13 LIMITE AGRILEG 56](#)), adopted at the [Agriculture and Fisheries Council meeting of May 2013](#).

⁸⁹ For example, according to the [European Union Press Agency](#), this statement of the so-called Visegrad countries, which also advocates curtailing the options of the Commission for delegating powers, also received support from other Member States (France, Germany, the Netherlands, Spain, Portugal, Poland, Sweden, United Kingdom). Several Member States also suggested that the European Commission submit a new proposal. However, these criticisms did not halt the [discussions end of 2014](#), the Latvian Presidency of the Council of the EU made this dossier one of its [priorities](#).

⁹⁰ Resolution [P7_TA\(2013\)0123](#).

⁹¹ See in particular Procedures [2014/0100\(COD\)](#) and [COM\(2014\) 179](#).

⁹² See in particular the results of the Commission for Agriculture and Rural Development hearing of 3 December 2014, which was covered by the [European Union Press Agency](#).

⁹³ See the Communication from the Commission: 'Work programme for 2015 - ([COM\(2014\) 910 final](#))', and in particular Annex II thereof.

5. Perspectives

European organic agriculture now finds itself at a crossroads. Another possible form of the ‘*Quarrel of the Ancients and the Moderns*’ lies in considering the origin of the organic movement as being in opposition to certain forms of industrialisation and modernisation of agricultural practices and exploitation of the soil. The debate on its future positioning must therefore take new realities into account. As a direct consequence of the success of organic agriculture in terms of marketing, some organic production operations are now being conducted on an industrial scale. The commercial and economic framework of the sector is no longer just ‘small business’.

Some may feel that this change justifies an overhaul of the principles of organic agriculture beyond its essentially environmental dimensions, in order to extend them to and underpin other societal values. Others see the need of first assessing the revision of the rules applicable to organic production methods in terms of costs/benefits or market demands, and then in terms of a possible perspective of ‘overflow’ of demands to conventional production methods. These different trends are addressed in, for example, the study performed by the INRA for the French General Commission for Strategy and Economic Foresight.⁹⁴ As an illustration of this debate, the authors of this study feel that:

... Although the harmonisation of national translations of the EU regulation on organic agriculture and more broadly the harmonisation of the rules and specification lists of organic agriculture on an international level is desirable, it also raises the question of strengthening (or conversely, relaxing) restrictions. The expected benefits of a possible relaxation would essentially lie in the production, collection and processing stages (increase of production performances and decrease of production costs), benefits that must be weighed against the disadvantages and in particular against the possible loss of confidence on the part of at least some consumers regarding products originating from organic agriculture. In cases where the nutritional, sanitary and organoleptic qualities of products originating from organic agriculture and conventional agriculture do not appear to be significantly different, the opportunity and the risk of a strengthening, or, conversely, of a relaxation, of the restrictions can only be appreciated by the impact on the environmental and social performances (use)(strengthening would presumably have the effect, all other things being equal, of diminishing production and economic performances, a diminishment which would have to be compensated for by raising the prices at consumption, whereas relaxation would have the opposite effect).

...

In summary, the challenge lies in moving away from the simplistic and unproductive opposition between the activists and the opportunists of organic agriculture, between local products and export markets, between short and long distribution channels, and between organic agriculture and conventional agriculture. ... In this regard, the socio-economic theory (i.e. transitions) that gives rise to the recommendation to abandon socio-technical impasses through hybridisation with innovative niches will find its full expression in agriculture if such niches are not in opposition to the majority model. Under these conditions, organic agriculture can then claim to be a prototype of a more sustainable form of agriculture for serving a broader purpose, namely that of the greatest possible sustainability of all agricultural and agrifood systems.

⁹⁴ Vers des agricultures à hautes performances. [Volume 1 – Analyse des performances de l’agriculture biologique](#) [Towards high-performance agriculture. Volume 1 – Analysis of the performances of organic agriculture], Guyomard H., (under the direction of the) INRA, September 2013.

Beyond the questions on the future of the organic sector and the contents of the legislative proposal (which could motivate its rejection by some or its defence as a basis for new rules by others), the announcement by the Commission of 16 December 2014 of a deadline of six months for the European Parliament and the Council to reach an agreement has changed the context in which this proposal is being discussed. This could in particular raise other questions of institutional nature, in cases where the treaties do not establish any deadline for legislators to conclude the steps of first reading. This position of the Commission could also be perceived as an interference with the European Parliament's prerogatives of defining its own work schedule, apart from the necessary consideration of the average normal timelines of ordinary legislative procedure and due to the fact that the appraisal of the proposal could not actually start until after the installation of the new legislature.

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[Organic agriculture in Germany](#), Federal Ministry of Food and Agriculture, June 2014, p. 20 (see also www.bmel.de).

Organic agriculture views itself as respecting natural cycles by refraining from the use of genetically modified organisms, by limiting the use of synthetic chemical products and by ensuring animal welfare.

Organic production, regulated and supported at EU level, is controlled, certified and labelled. The specifications list also adapts to different kinds of production. Initially a niche market, organic agriculture now represents a European market worth more than EUR 22 billion a year, with demand continuing to increase. The organic sector, seeking a vision for the future, must respond to certain challenges, particularly in its coexistence with conventional agriculture, but also in terms of producer and consumer confidence in the system and its values, in a context of growing international exchanges.

In March 2014, the European Commission proposed to revise the entire legislative framework of the organic sector, in particular with the aim of reducing the current derogation practices, reviewing the control system and the import regime, simplifying the legislation and cutting down on the red tape. Some initial reactions to these proposals seem rather critical. The first reading legislative appraisal has started in the European Parliament, but the announcement of the new "Juncker Commission" of its intention to withdraw this proposal by mid-2015 should an agreement not be reached by then could change the context.

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