Organic farming & insects

Sustainable innovations in Agriculture: NGO perspective

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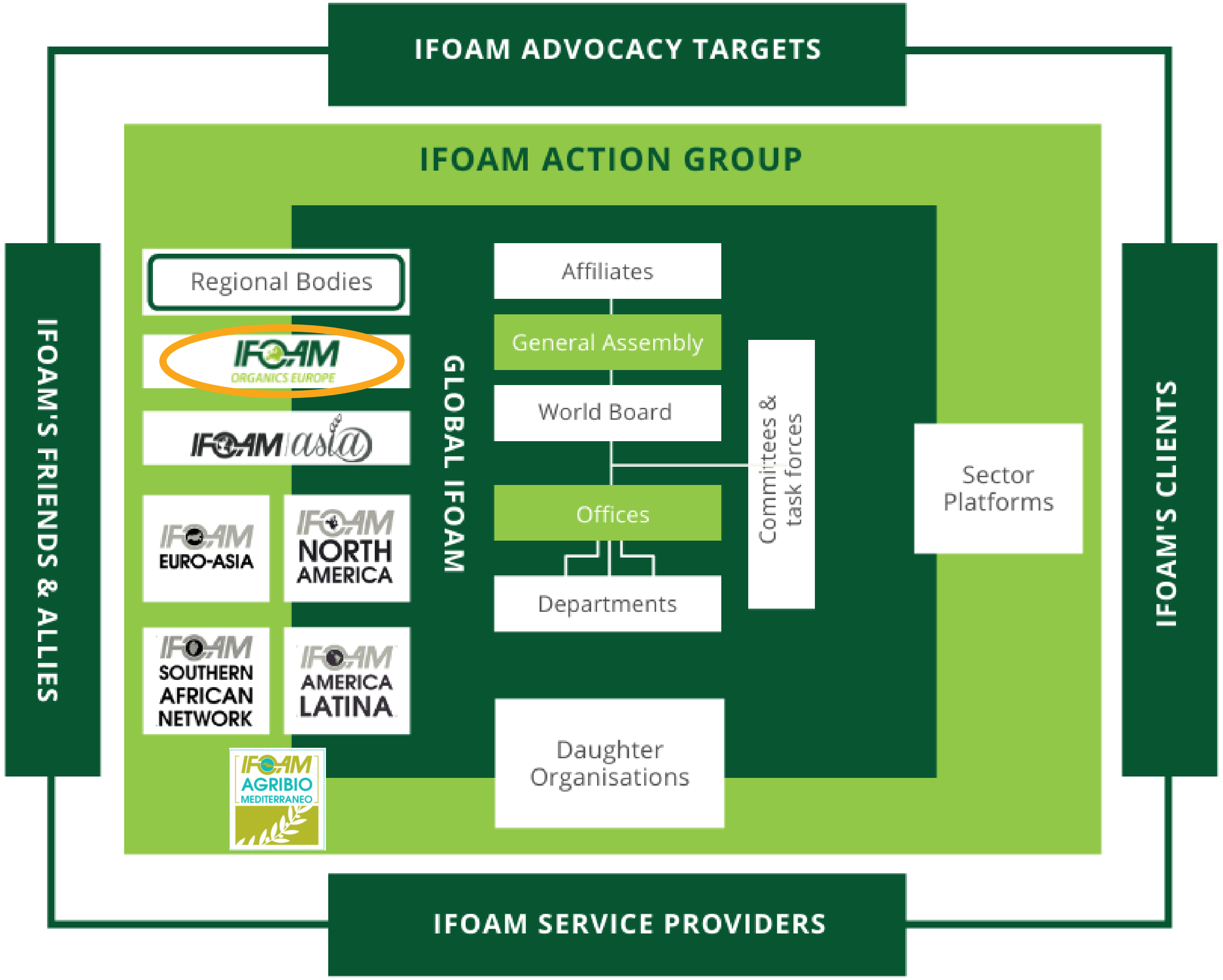
Regulation Consultant

21 November 2024

ORGANICS EUROPE

IFOAM'S GLOBAL ACTION NETWORK



About IFOAM – Organics International

- Founded in 1972…
- IFOAM – Organics International is the global organic network working towards true sustainability in food and farming, guided by the principles of organic agriculture.
- **www.ifoam.bio**

About IFOAM Organics Europe

- Founded in 2002…
- IFOAM Organics Europe is the voice for organic stakeholders with the EU institutions
- **www.organicseurope.bio**

IFOAM ORGANICS EUROPE

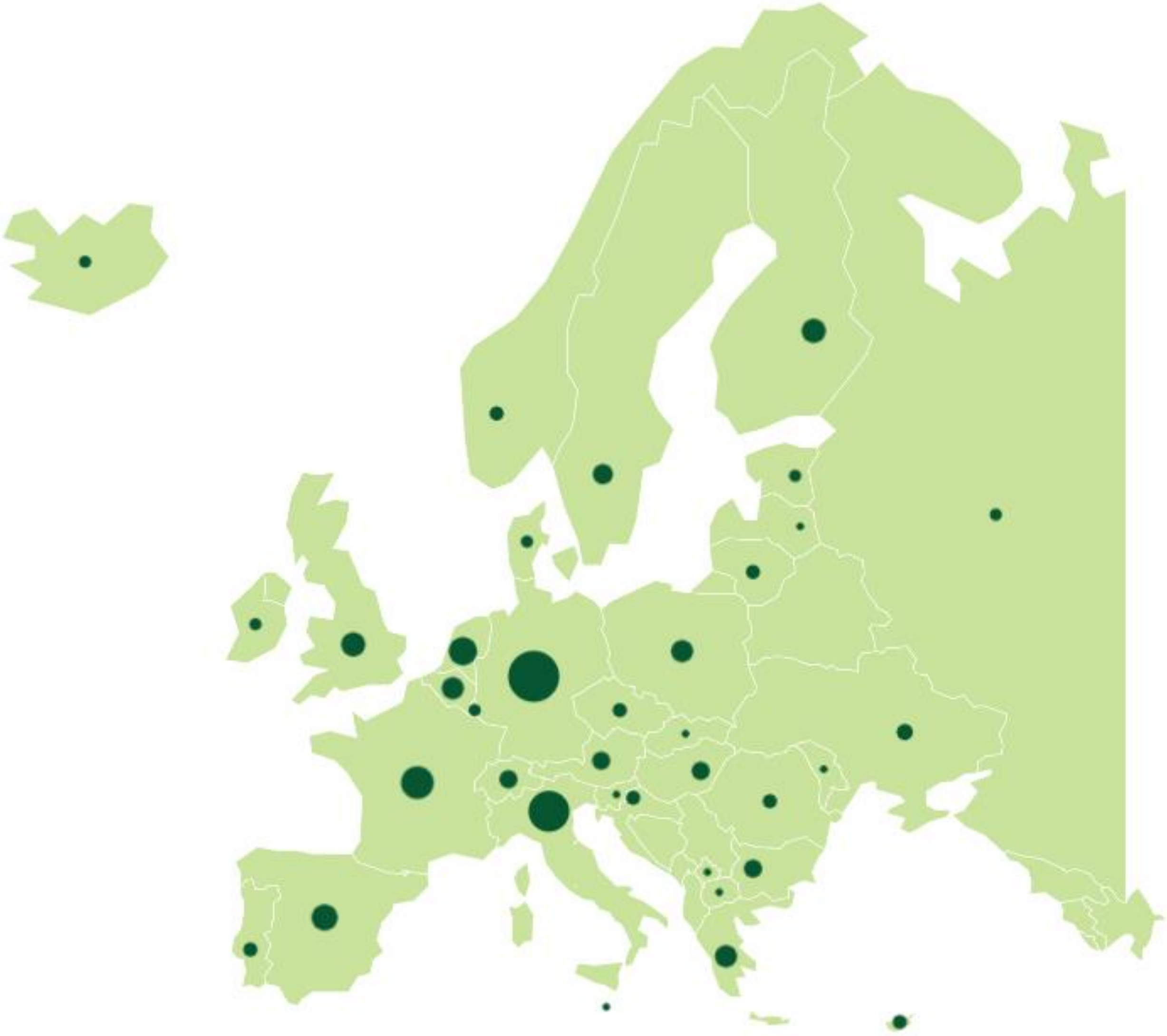
ONE VOICE FOR ORGANIC STAKEHOLDERS

IFOAM ORGANICS EUROPE
MAKING EUROPE MORE ORGANIC

WHO WE REPRESENT

- IFOAM Organics Europe represents the entire organic food chain and beyond
- We count almost 200 members in 34 European countries
- Based on the IFOAM principles of organic agriculture:
  Health, Ecology, Fairness & Care

OUR MEMBERS



Our solid structure:
The reason behind our success

9 **Board and**

30+ **Council Members**
formulating positions and leading the organization.

20+ **Staff Members**
Operating in the heart of the European Union.

4 **Interest Groups**
providing direct involvement from the sector on organic certification and integrity, farming, processing and trade, and retail.

30+ **Seats in the Civil Dialogue Groups of the European Commision**
holding a regular dialogue on all matters related to the Common Agricultural Policy and rural development.

10 **Expert Groups and Task Forces**
Working on important developments and advising the IFOAM EU Board and Council on topics like seeds, GMOs, the new organic regulation, cosmetics and textile, climate change, and many others.

WORKING ON EU POLICY AREAS

…with a big impact on organic operators

Inclusion of organic farming as a solution in EU policies

EU Biodiversity strategy mentions organic farming as solution to halt biodiversity loss

Shaping EU technical rules to ensure workable implementation of new EU Organic Regulation

Postponement implementation new EU Organic Regulation to 2022

Input to new EU Organic Action Plan to boost both production & consumption of organic products

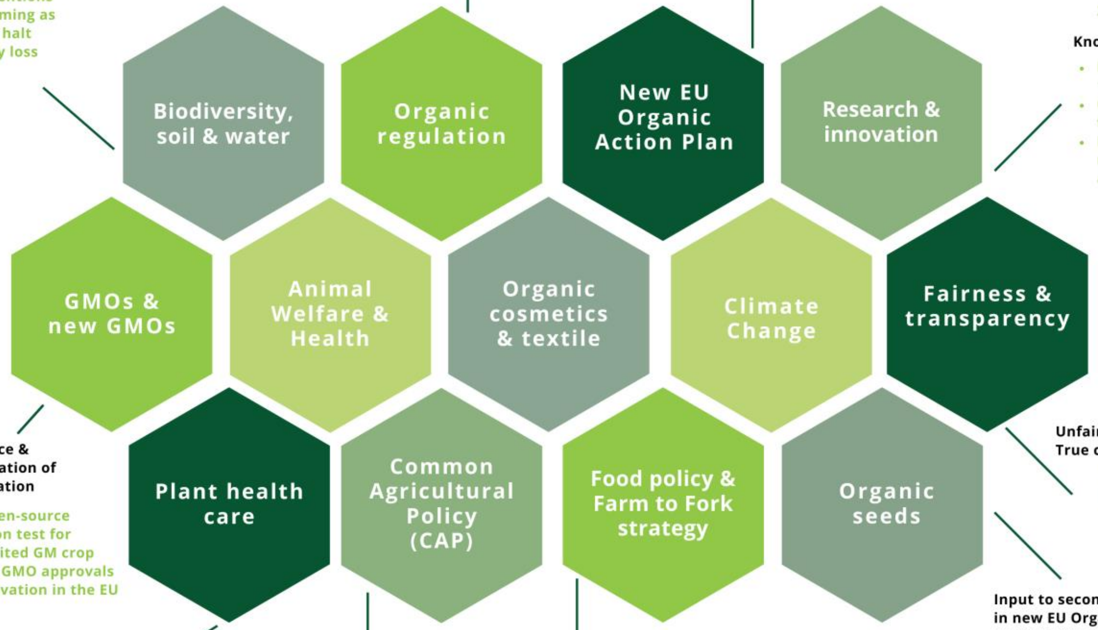
Advocacy meetings with policy-makers ahead of publication in spring 2021

R&I advocacy / TP Organics

- 5 position papers between 2015-2020
- Strategic Research & Innovation Agendas in 2009, 2014 & 2019

Knowledge for organic

- Partner in more than 10 running projects
- Coordinated 3 projects from 2015-2020
- More than 50% success rate in project applications



Maintenance & implementation of GMO legislation

- First open-source detection test for gene-edited GM crop
- No new GMO approvals for cultivation in the EU

Unfair Trading Practices (UTPs)
True cost accounting

UTP Directive protecting more vulnerable actors

Pesticide & fertiliser legislation

Broad political commitment to phase out chemical synthetic pesticides

CAP reform & rural development

- Ringfencing 30% for Eco-schemes
- Ensuring support & budget for conversion & maintenance in national CAP strategic plans

Integration of the Farm to Fork strategy's objectives & the CAP
Green Public Procurement
Food & environmental labelling

- Target of 25% organic land in EU by 2030
- EU promotion programme earmarks 86 million EUR for organic & sustainable agriculture

Input to secondary legislation on seeds in new EU Organic Regulation
Contributing to review EU Seed Legislation

No more patents on conventionally bred plants & animals

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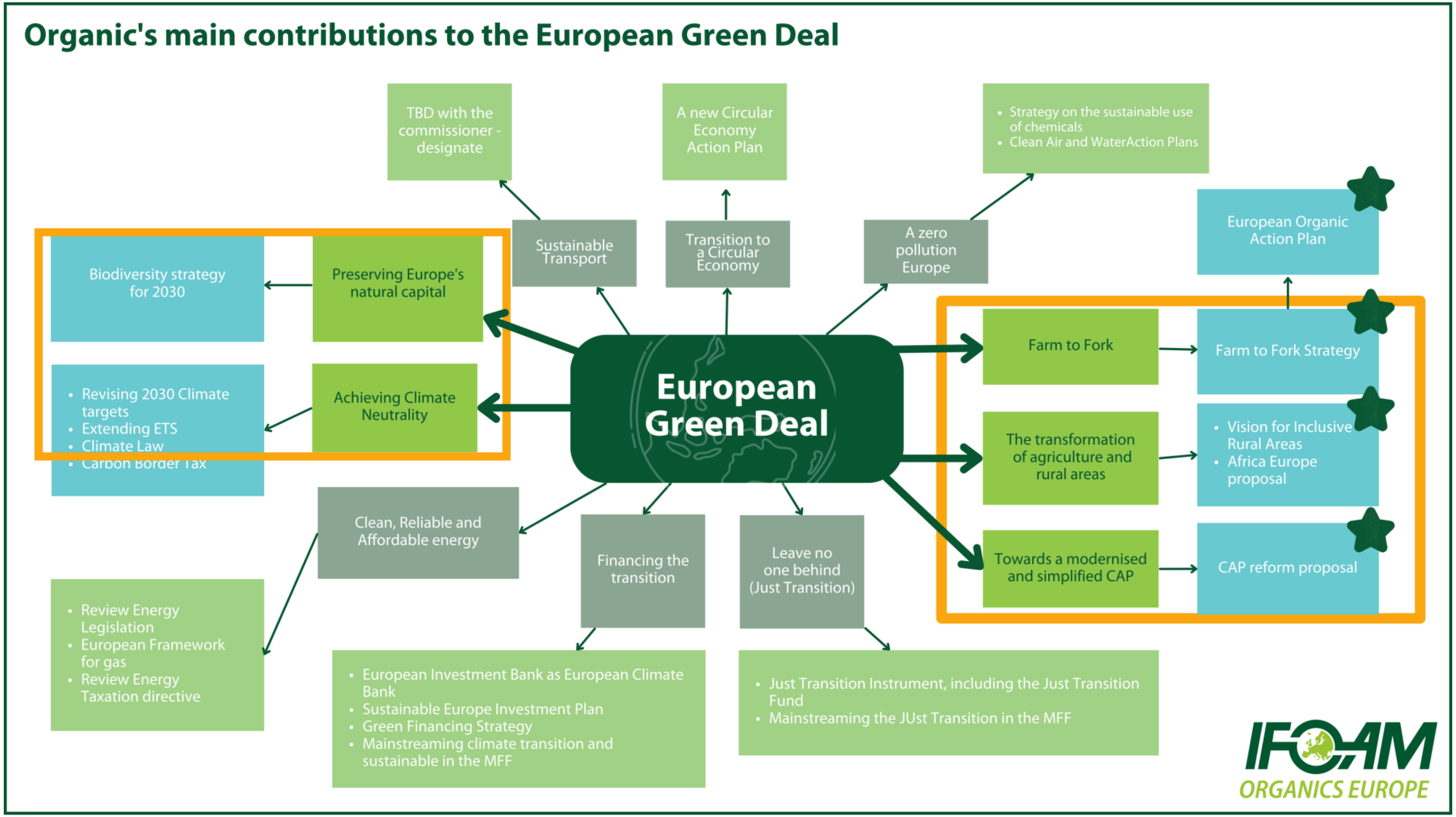
WORKING ON EU POLICY AREAS

...with a big impact on organic operators



WORKING ON ORGANIC DEVELOPMENT

…to develop the movement’s capacity

- FutureEUAqua - Innovating aquaculture
- FoodShift2030 - Tranforming Europe's food system
- LIVESEED - Boosting organic seed & plant breeding
- RELACS - Phasing out dependency on & use of contentious inputs
- SmartAgriHubs - Realising the digitisation of agriculture

Special programme for CEE & neighbouring countries

- Annual European Organic Congress
- Annual IFOAM Organics Europe Meets Business
- Bi-annual Organic Food Conference
- Partner in annual "TP Organics' Innovation Days"
- Participation in annual BIOFACH

- BIOFRUITNET - Strengthening the competetiveness of European organic fruit production
- Organic Farm Knowledge platform - Exchanging knowledge to enhance organic farming
- "Let's discuss organic" webinars
- Regular exchange with IFOAM Organics Europe's interest groups

- European Organic Communications Hub
- Member extranet

- Provide tools for strategy development
- Support for Action Plan development
- Update of internal strategy

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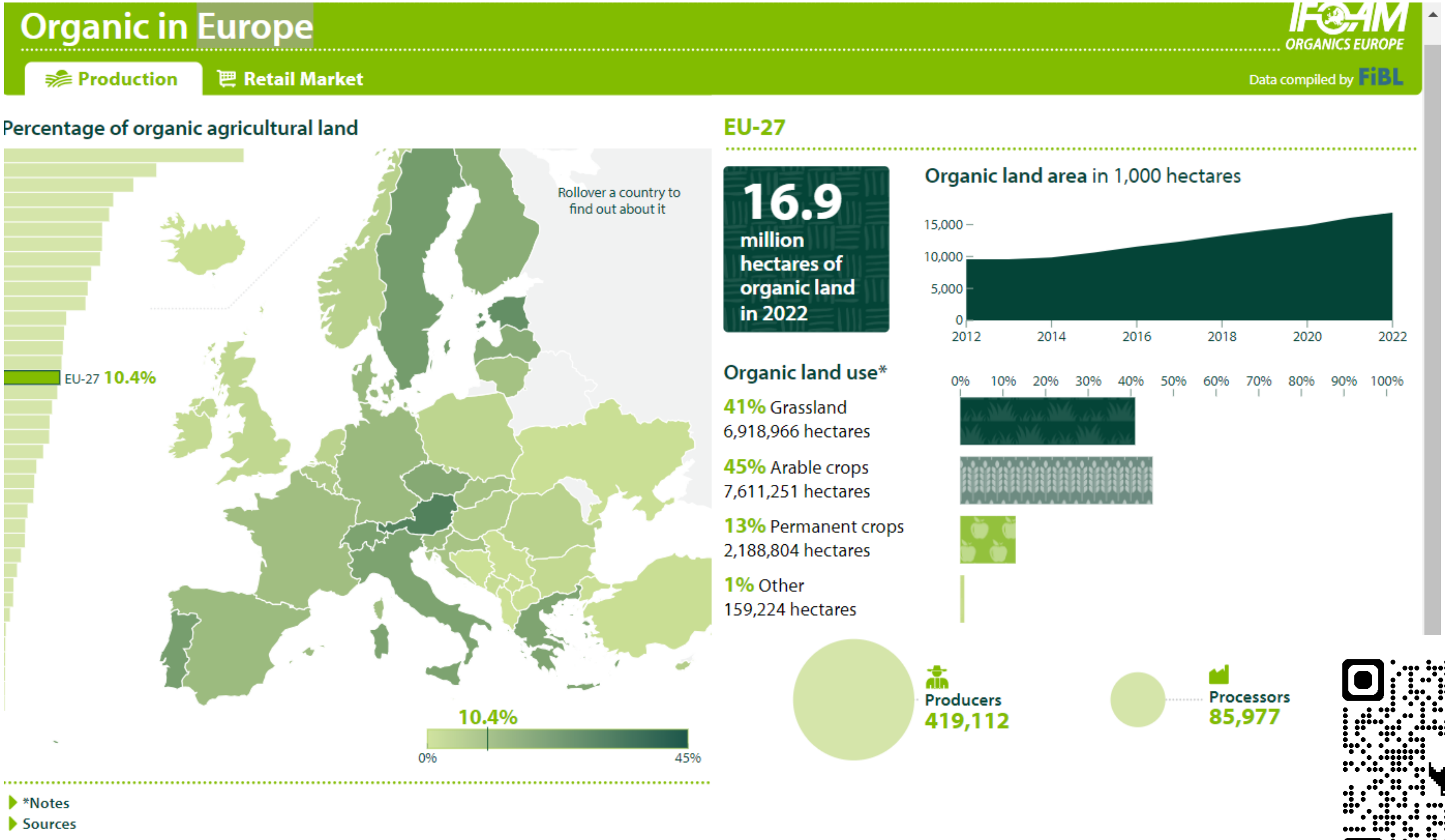
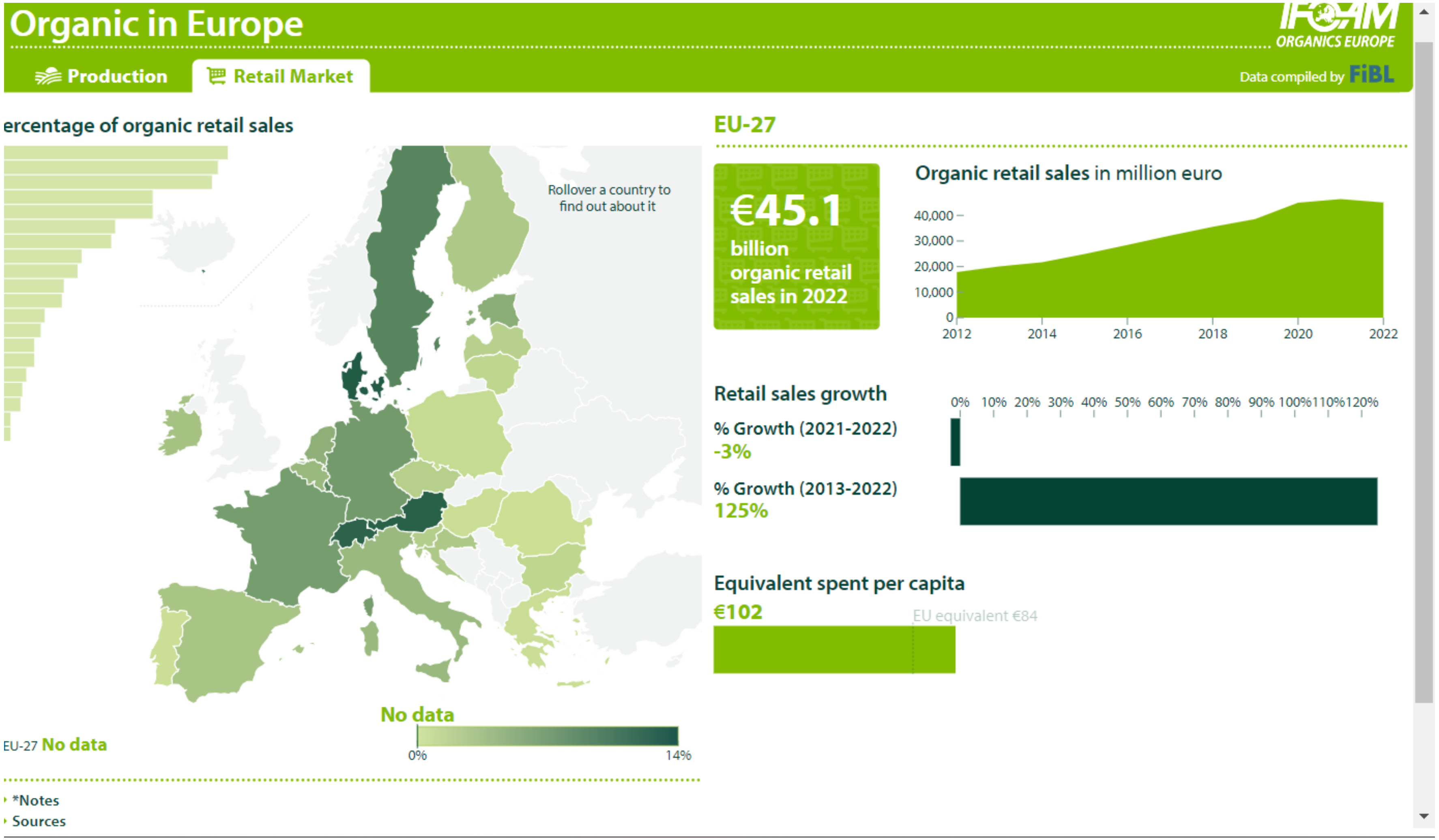
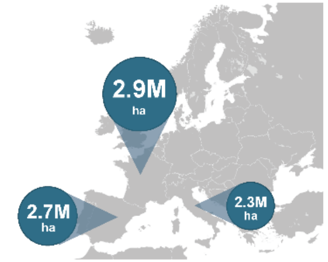


Organic in Europe
IFOAM ORGANICS EUROPE
Production
Retail Market
Data compiled by FiBL
Percentage of organic agricultural land
EU-27 10.4%
Rollover a country to find out about it
10.4%
0%
45%
*Notes
Sources
EU-27
16.9 million hectares of organic land in 2022
Organic land area in 1,000 hectares
15,000
10,000
5,000
0
2012
2014
2016
2018
2020
2022
Organic land use*
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
41% Grassland
6,918,966 hectares
45% Arable crops
7,611,251 hectares
13% Permanent crops
2,188,804 hectares
1% Other
159,224 hectares
Producers
419,112
Processors
85,977


Organic in Europe
IFOAM ORGANICS EUROPE
Production
Retail Market
Data compiled by FiBL
ercentage of organic retail sales
Rollover a country to find out about it
EU-27 No data
No data
0%
14%
*Notes
Sources
EU-27
€45.1 billion organic retail sales in 2022
Organic retail sales in million euro
40,000
30,000
20,000
10,000
0
2012
2014
2016
2018
2020
2022
Retail sales growth
% Growth (2021-2022)
-3%
% Growth (2013-2022)
125%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100% 110% 120%
Equivalent spent per capita
€102
EU equivalent €84

Organic Agriculture in the European Union 2022

Organic Farmland



16.9M ha — Organic farmland in million (M) hectares (ha)

5.1% — Growth 2021/2022

10.4% — Organic share of total farmland

Farmland in million hectares
Top 3 countries

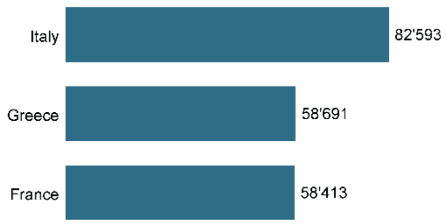
Organic Producers

The number of organic producers is increasing

419'112 — Organic producers

9.5% — Growth 2021/2022

Number of producers
Top 3 countries



Organic Market

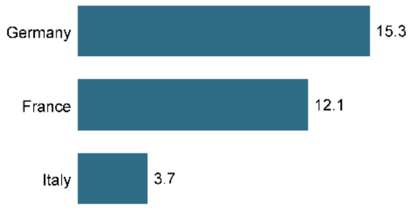
The European Union´s market contracts slightly in 2021/2022

45.1 — European Union´s organic retail sales in billion euros

102 — Per capita spending in euros

-2.8% — Organic market decline 2021/2022

Market in billion euros
Top 3 countries



Market growth in percent
Top 3 countries 2021/2022

FiBL Source: FiBL survey © 2024
More information: www.organic-world.net - statistics.fibl.org

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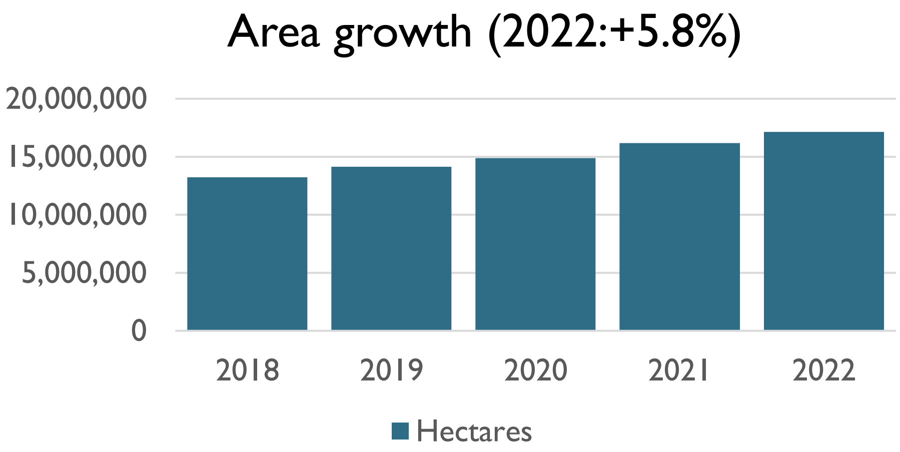
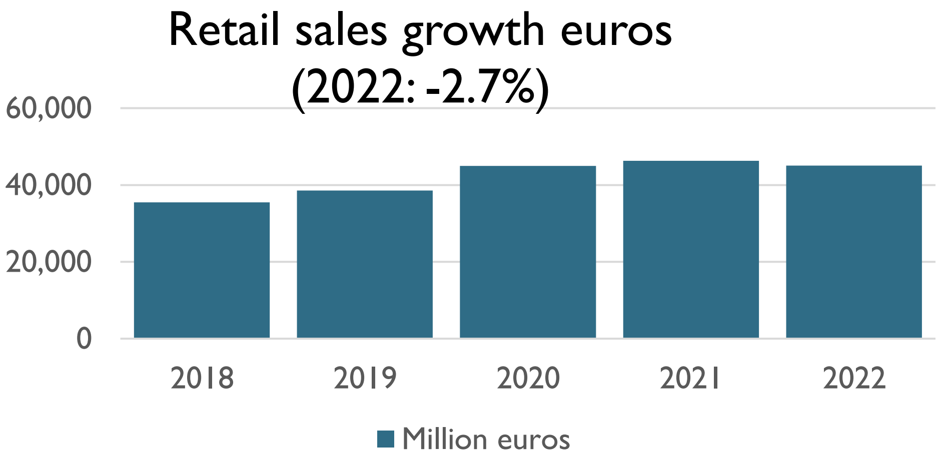
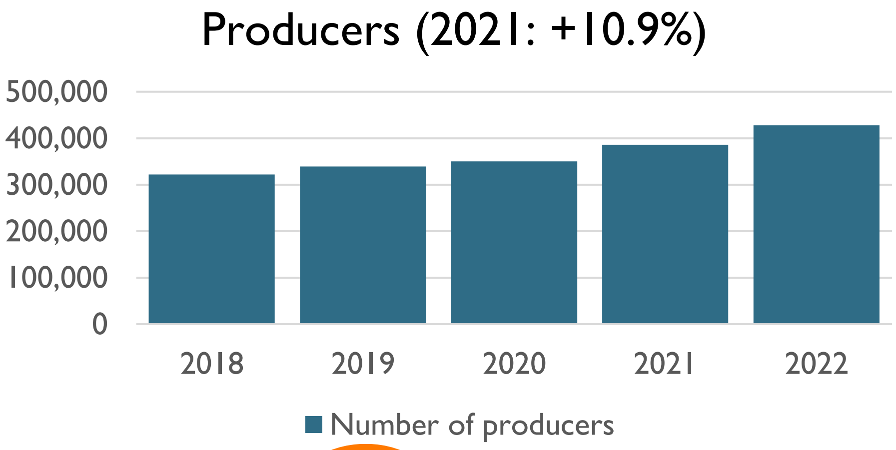
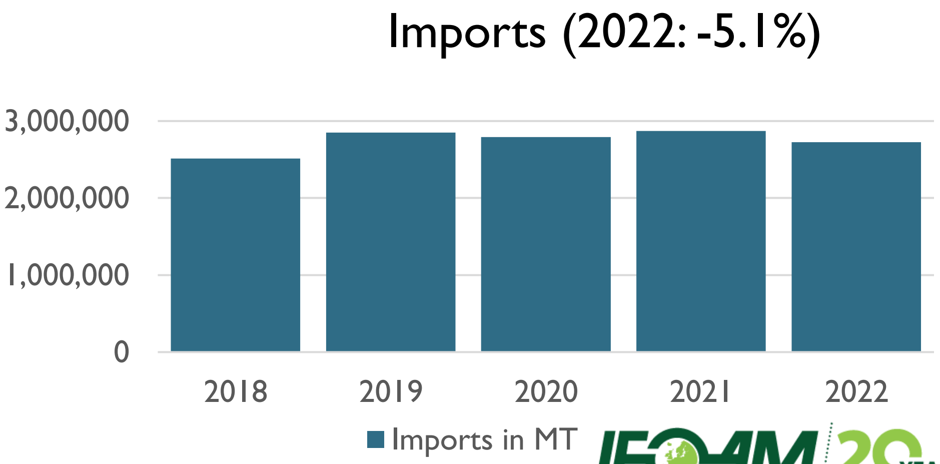
Organic Agriculture in the European Union: Status 2022









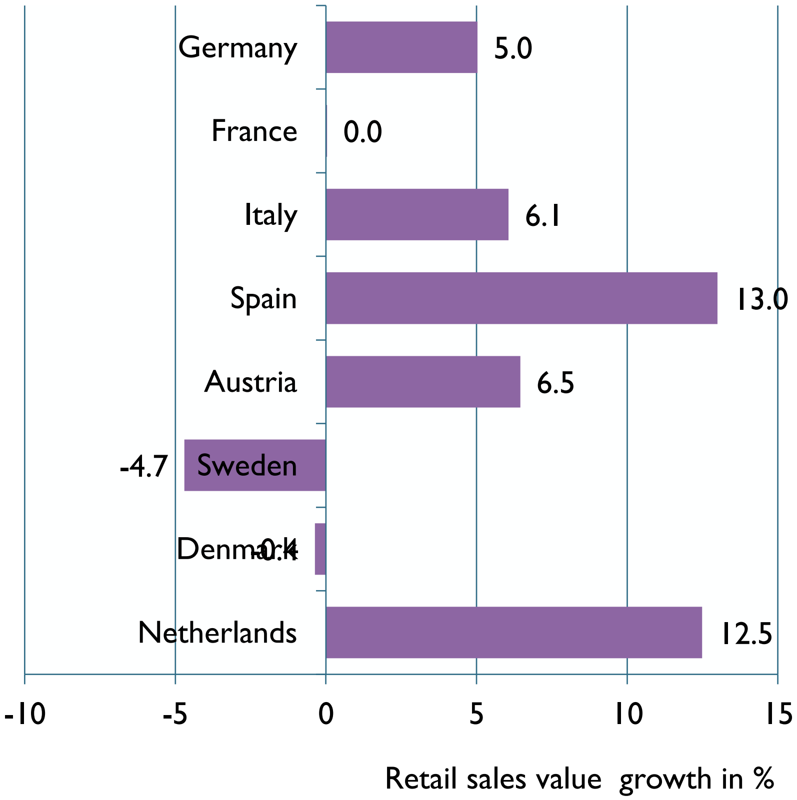
EU organic retail sales 2023: Growth rates for largest markets (EU: ca. 46.7 billion euros, +3.4%)

EU retail sales 2023

Source: FiBL AMI Survey 2024

EU organic retail sales growth 2023

Source: FiBL AMI Survey 2024



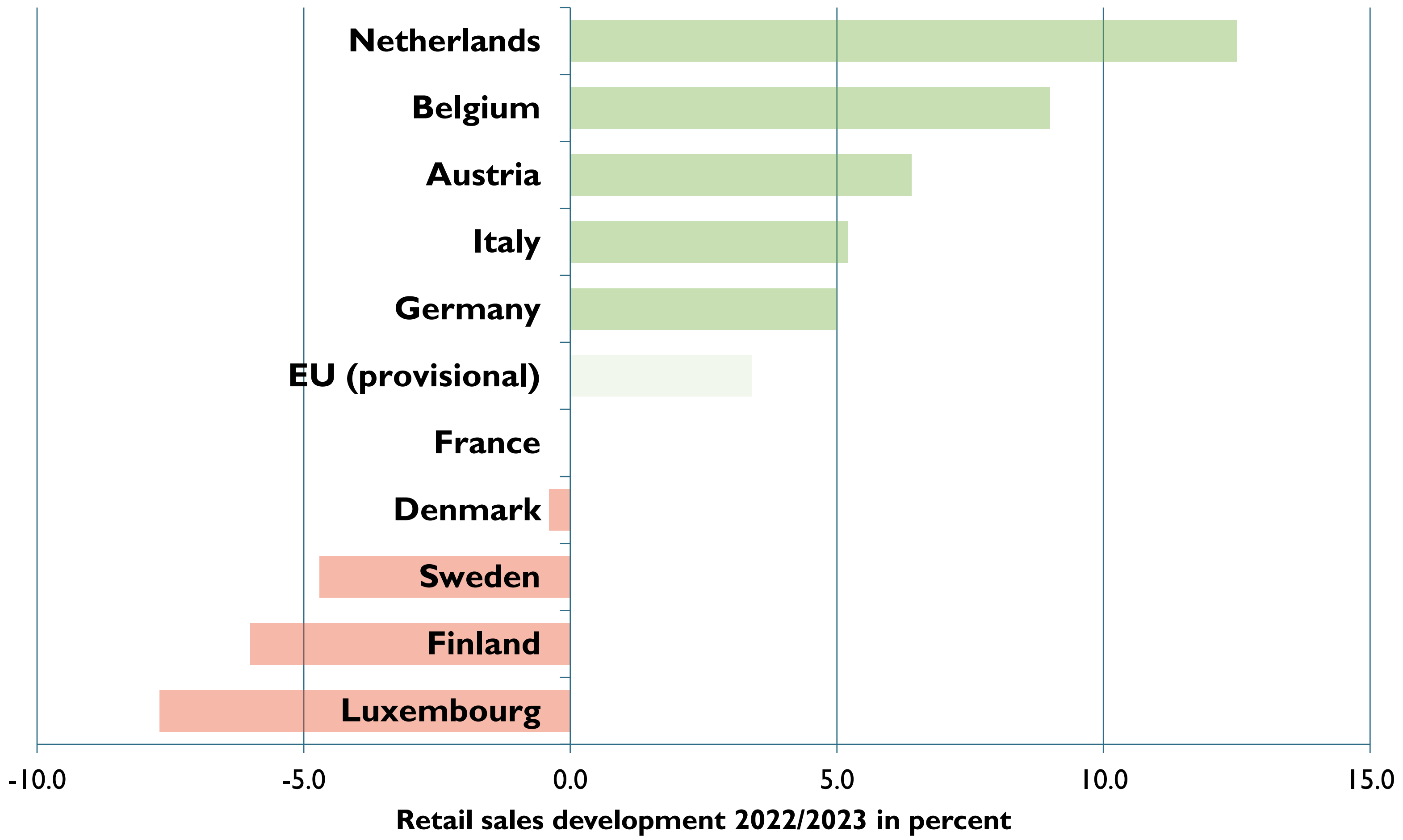
EU growth rate 3.4%

Growth mainly due to higher prices

Compared to inflation rate of 7-8 % growth rate too low

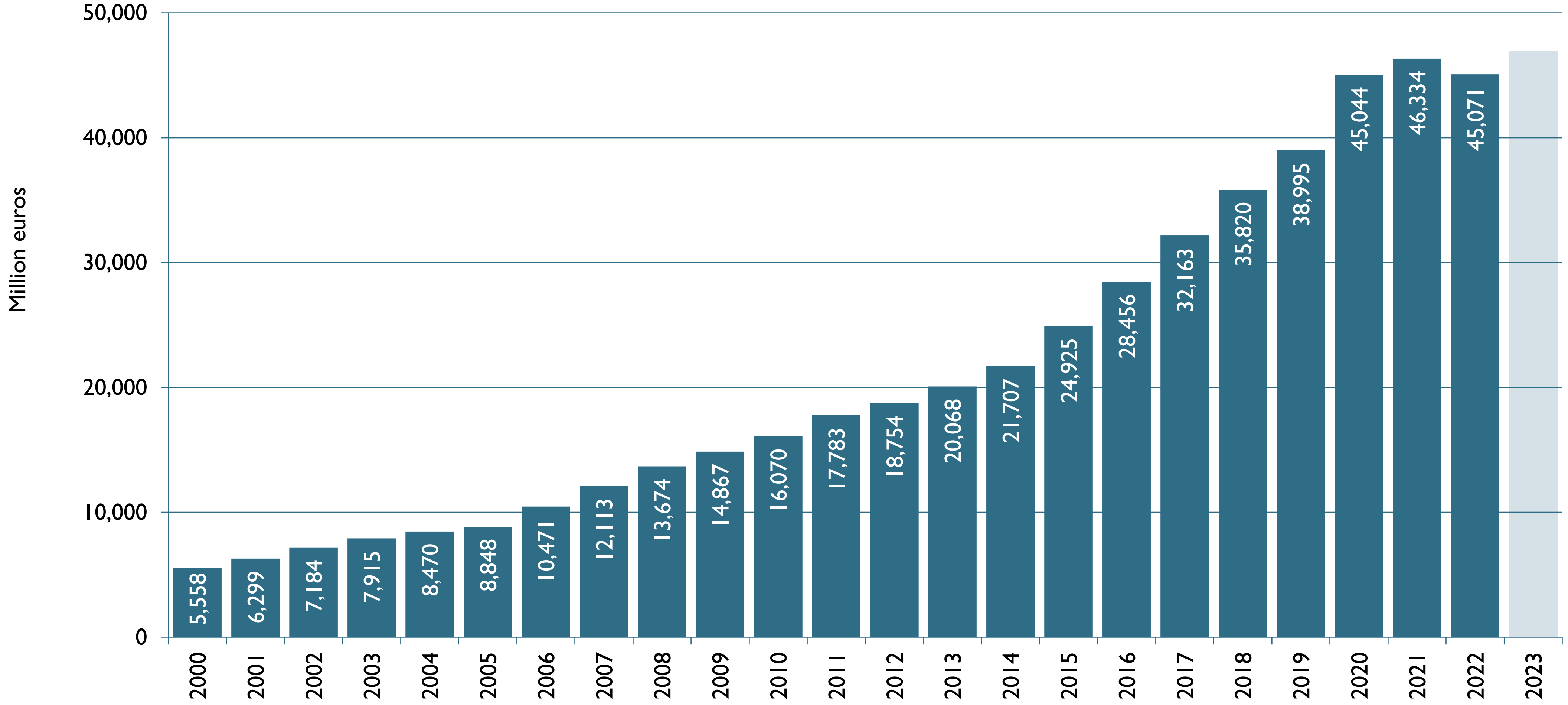
Market development 2023 in select countries

Source: FiBL AMI survey 2023



After the drop 2022 the organic market recovered 2023 due to higher prices – growth of 3.4 % (POVISIONAL)

Organic retail sales growth 2001-2023 (2023 preliminary) Source: FiBL-AMI Survey



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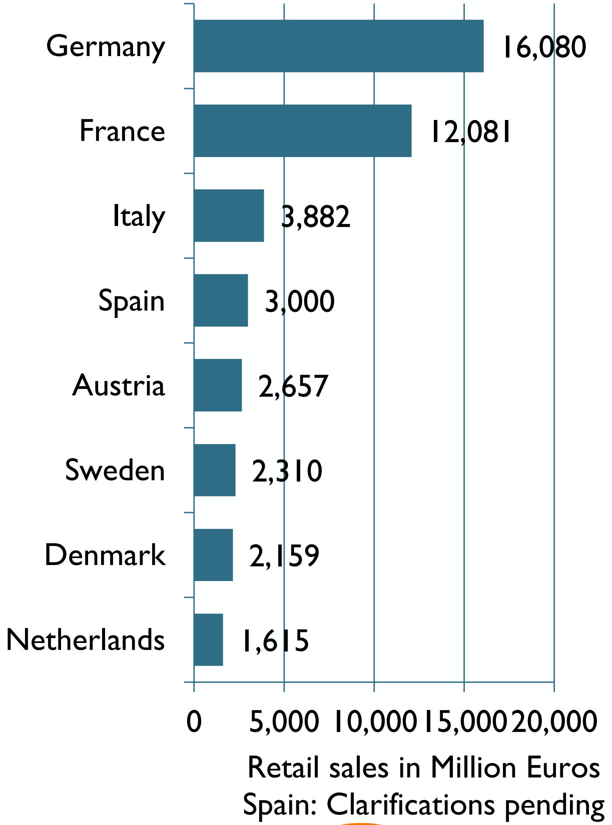
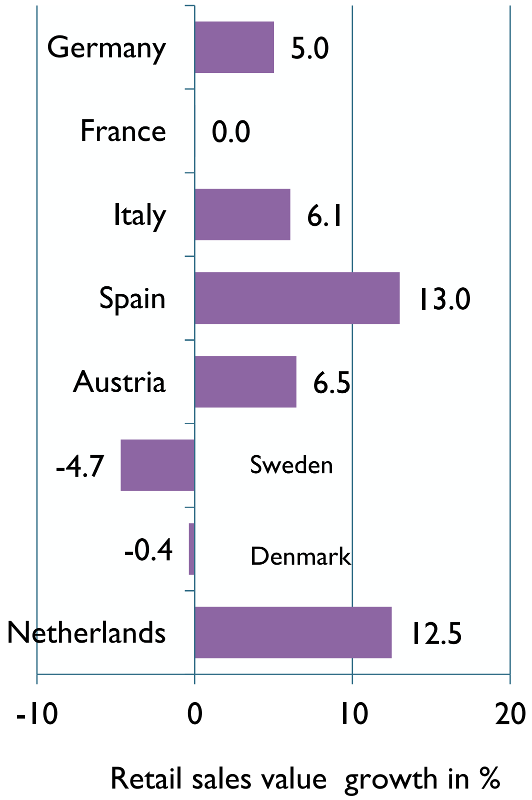
EU organic retail sales 2023+2024 (1st half): Growth rates; 2024: very inconsistent picture

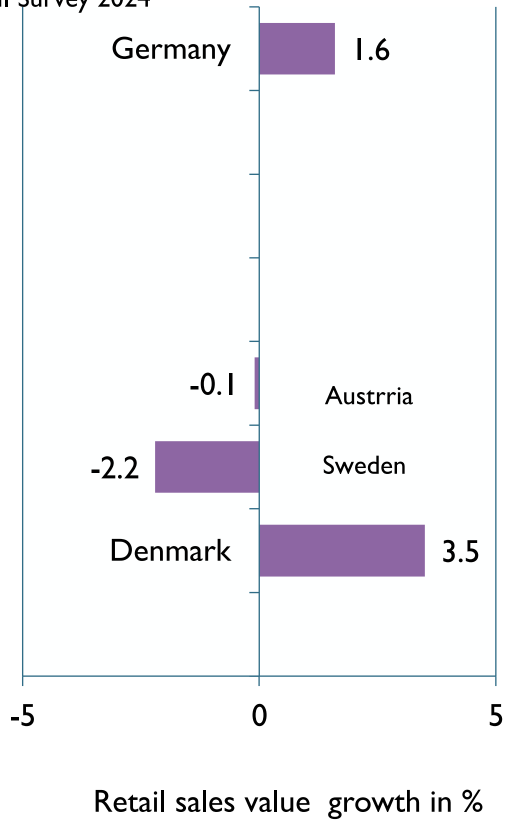
EU retail sales 2023
Source: FiBL AMI Survey 2024



Growth 2023
Source: FiBL AMI Survey 2024



Growth 2024 (provisional, data for first half of the year, comparing 2023 and 2024)
Source: FiBL AMI Survey 2024



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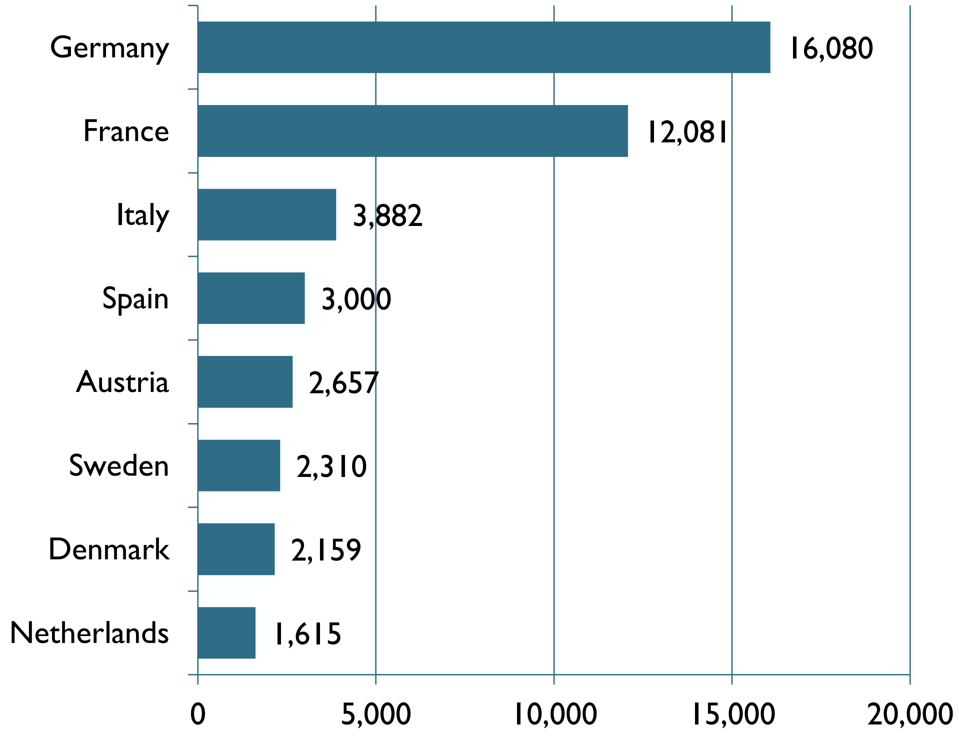
EU organic retail sales 2023: Per capita consumption by largest markets (EU: 104 euros; +2.5%)

EU retail sales 2023

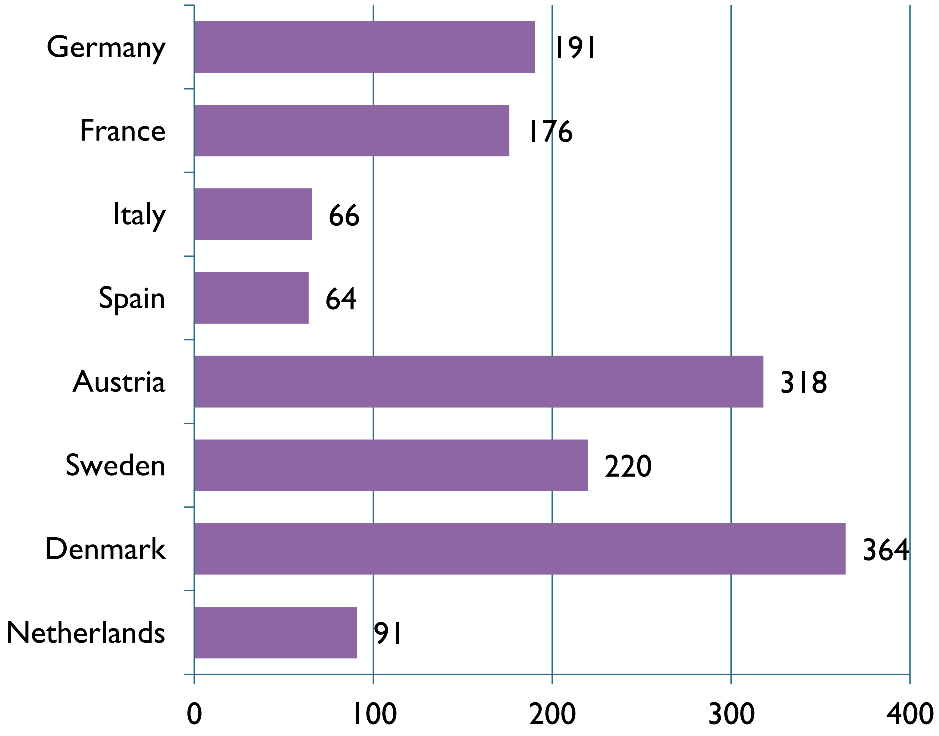
Source: FiBL AMI Survey 2024



Retail sales in Million Euros
Spain: Clarifications pending

EU organic retail consumption per person 2023

Source: FiBL AMI Survey 2024

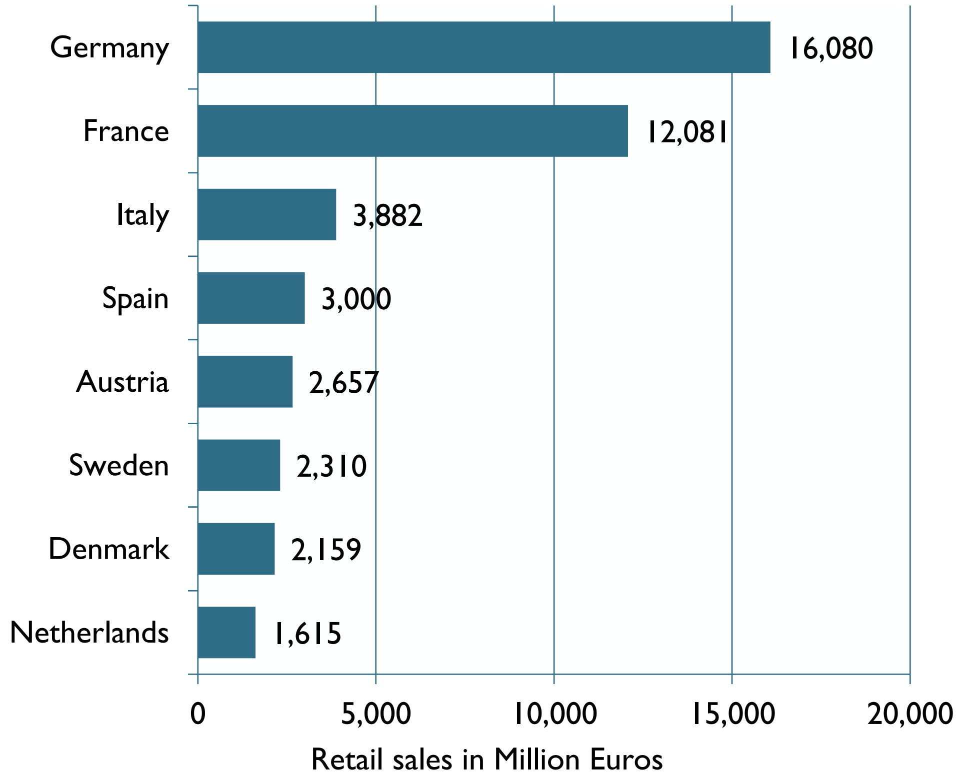


Per capita consumption in euros

EU organic retail sales 2023: Organic market share

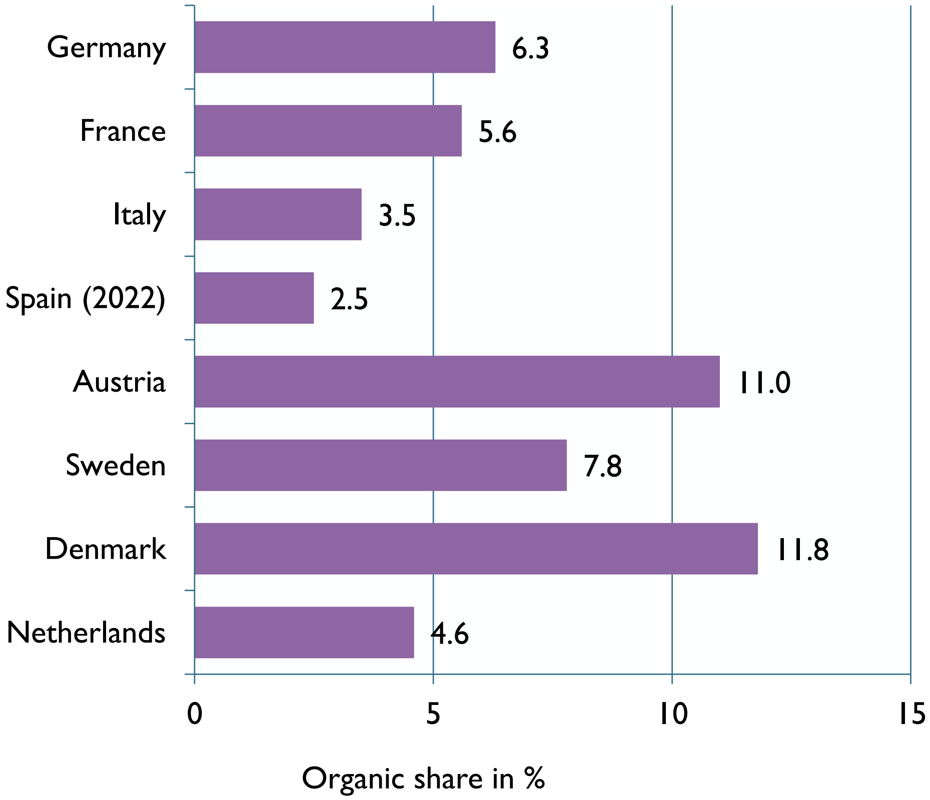
Organic retail sales 2023

Source: FiBL AMI Survey 2024



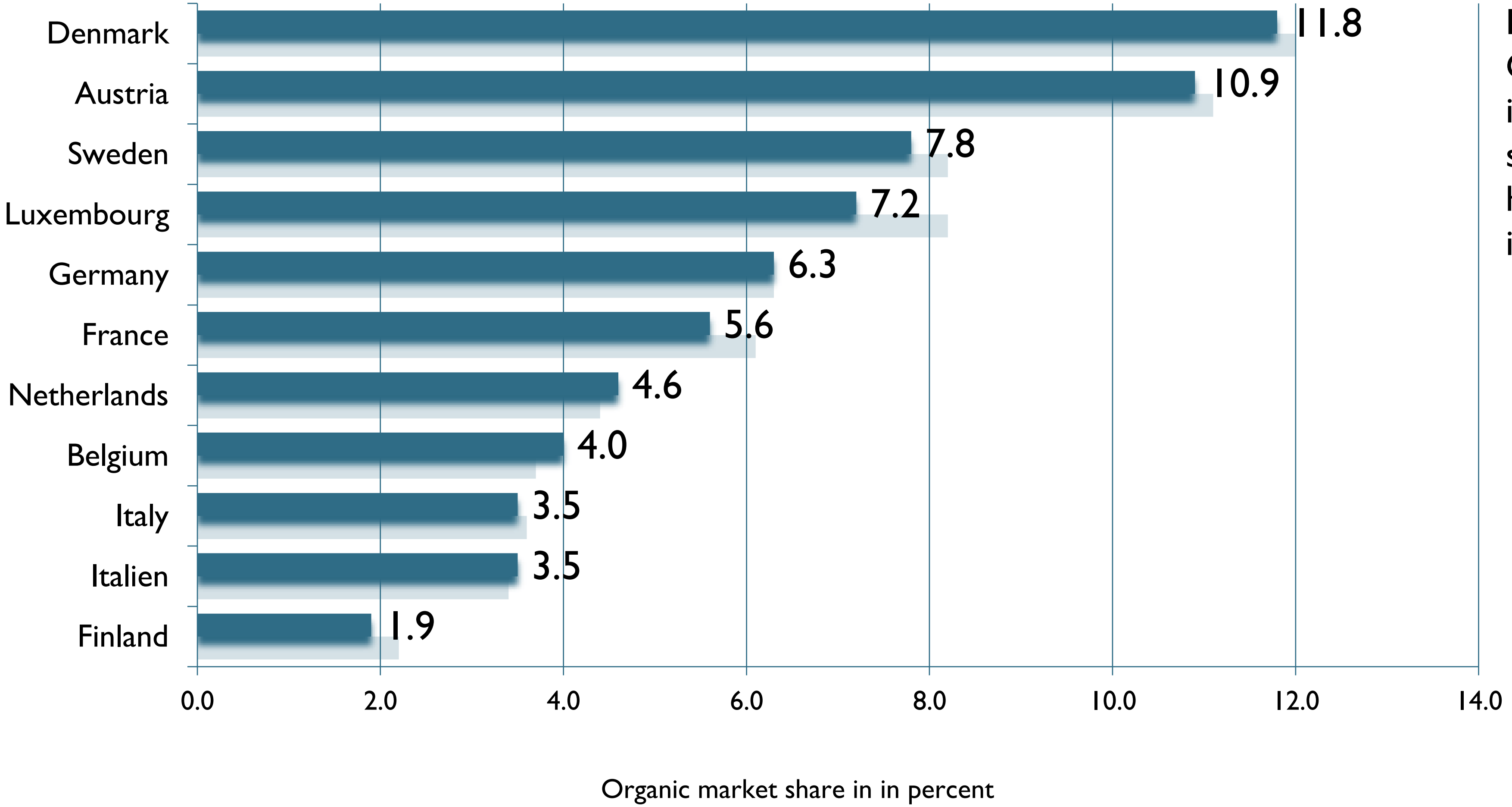
Organic market shares

Source: FiBL AMI Survey 2024



European Union: Organic market shares 2022 and 2023 compared

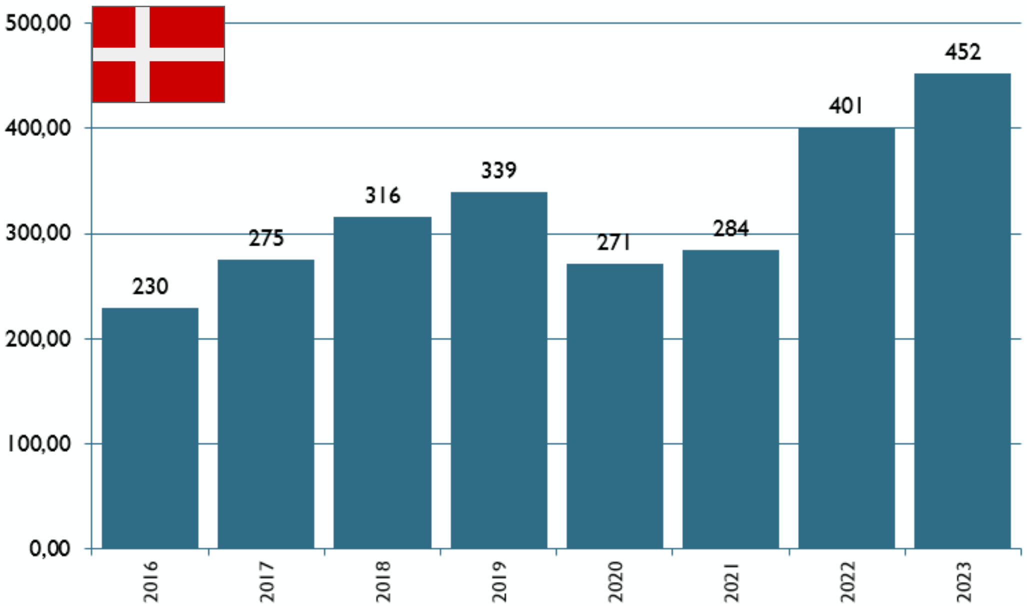
Source: FiBL AMI survey 2024

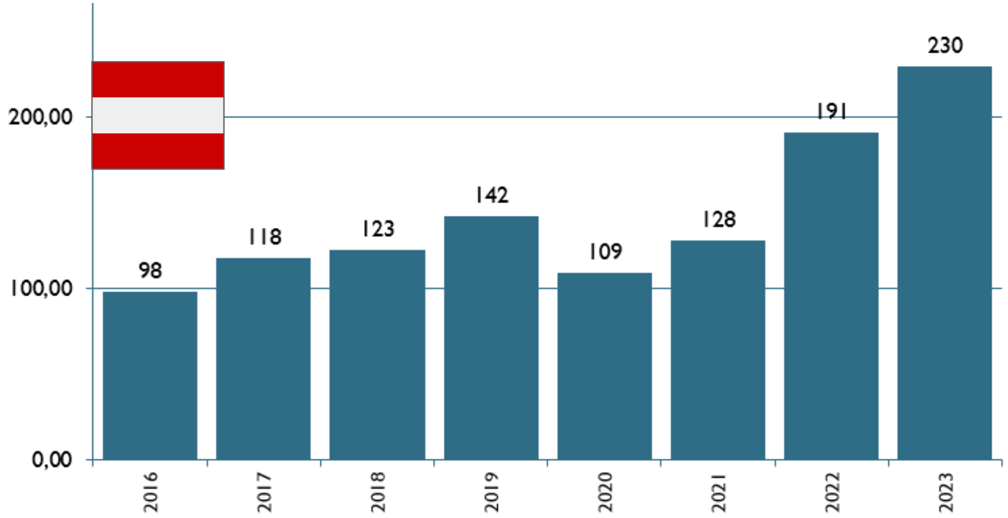


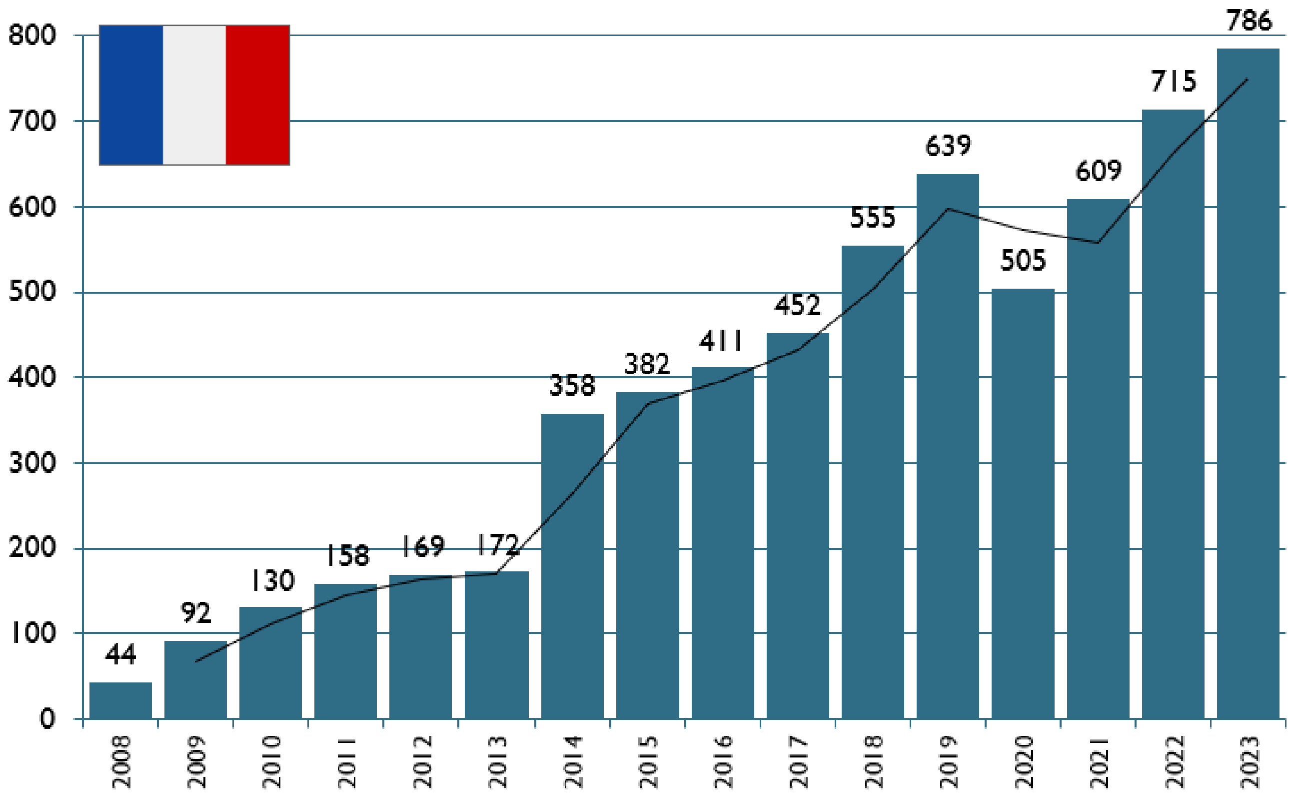
Lower organic shares
Overall food prices have increased even more significantly due to higher prices and inflation.

After the Corona drop, catering sales are growing faster than retail sales

Organic catering sales in France, Austria and Denmark, in million EUR







Agri Food Chain Observatory | © AMI GmbH

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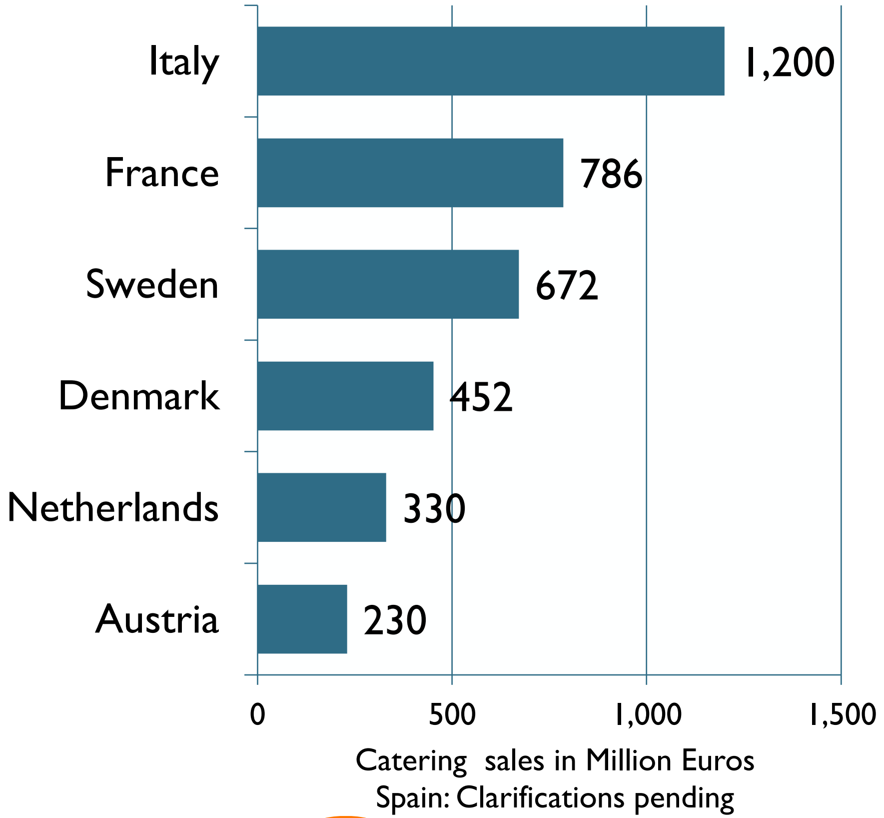
Organic growth is taking place in the catering sector

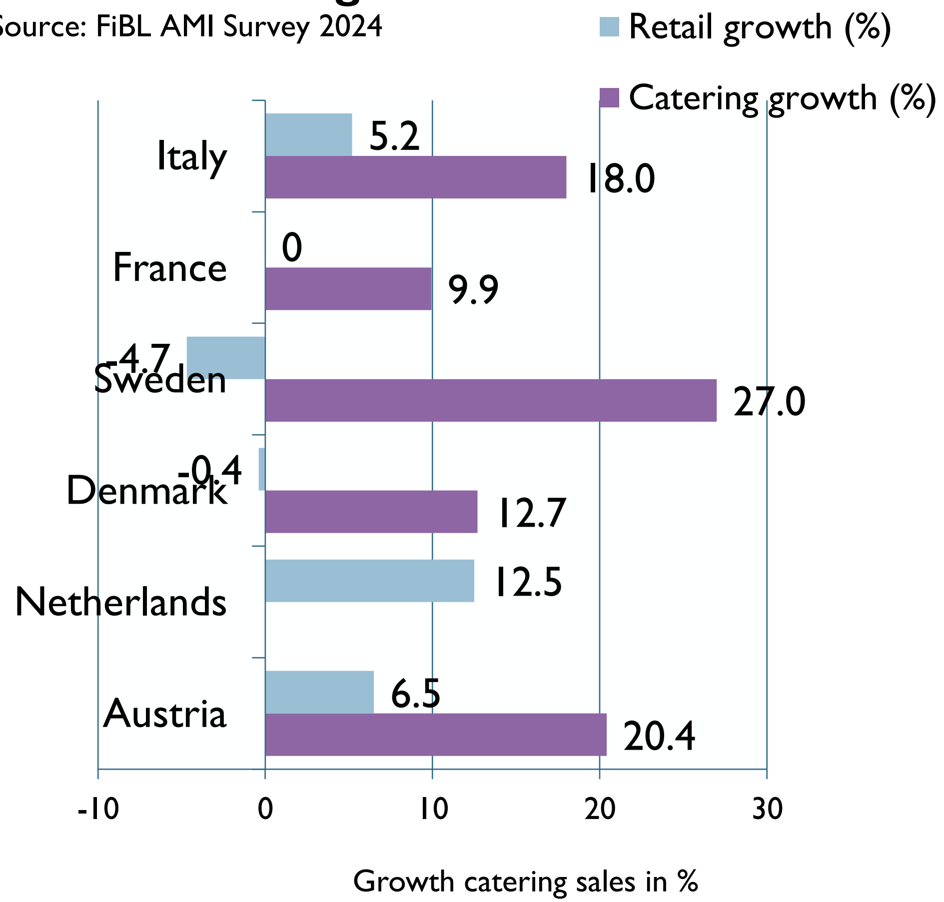
Organic catering sales 2023

Source: FiBL AMI Survey 2024



Growth catering sales 2023

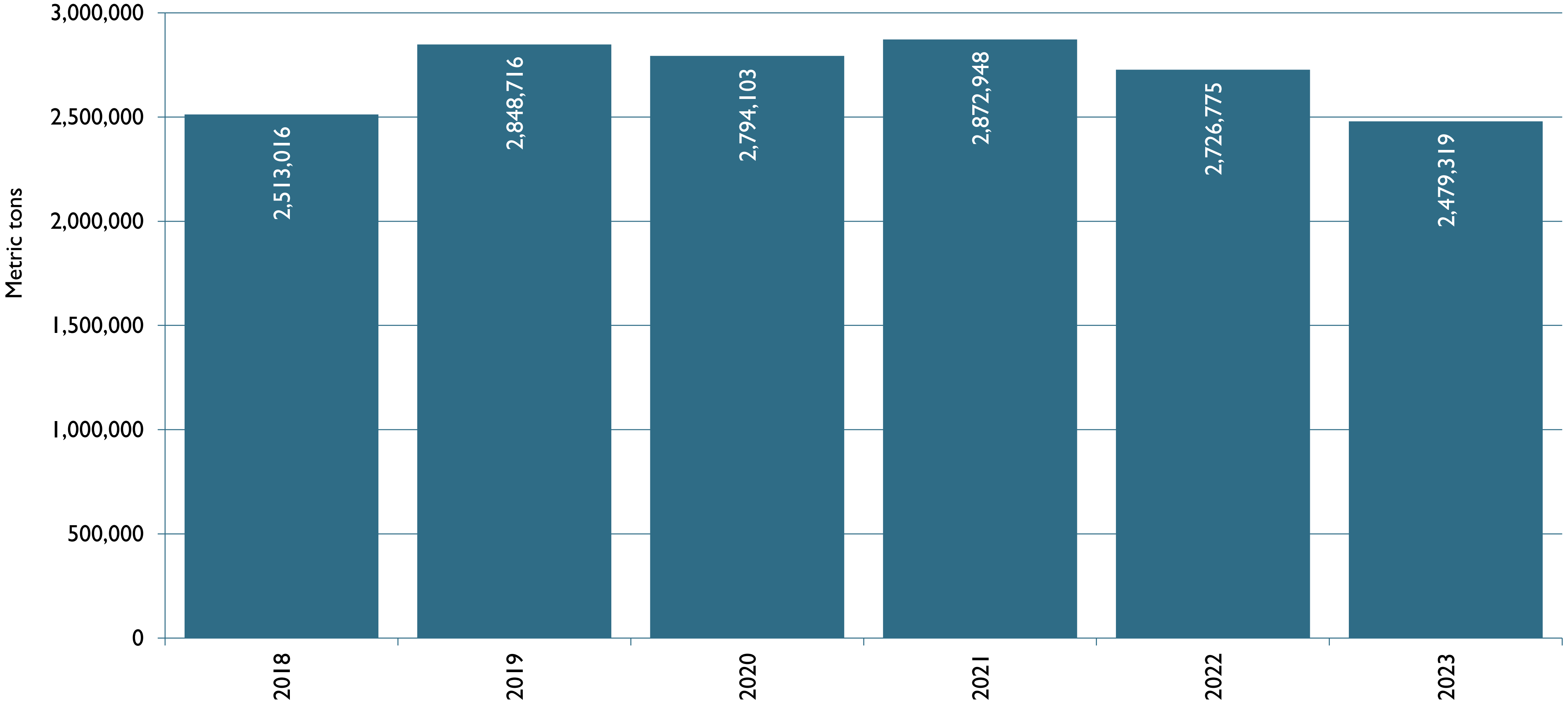
Source: FiBL AMI Survey 2024



The catering sector is growing at a faster pace than household purchases, although it remains at a lower overall level.

European Union: Imports 2018-2023

Source: European Commission/TRACES. Graph: FiBL

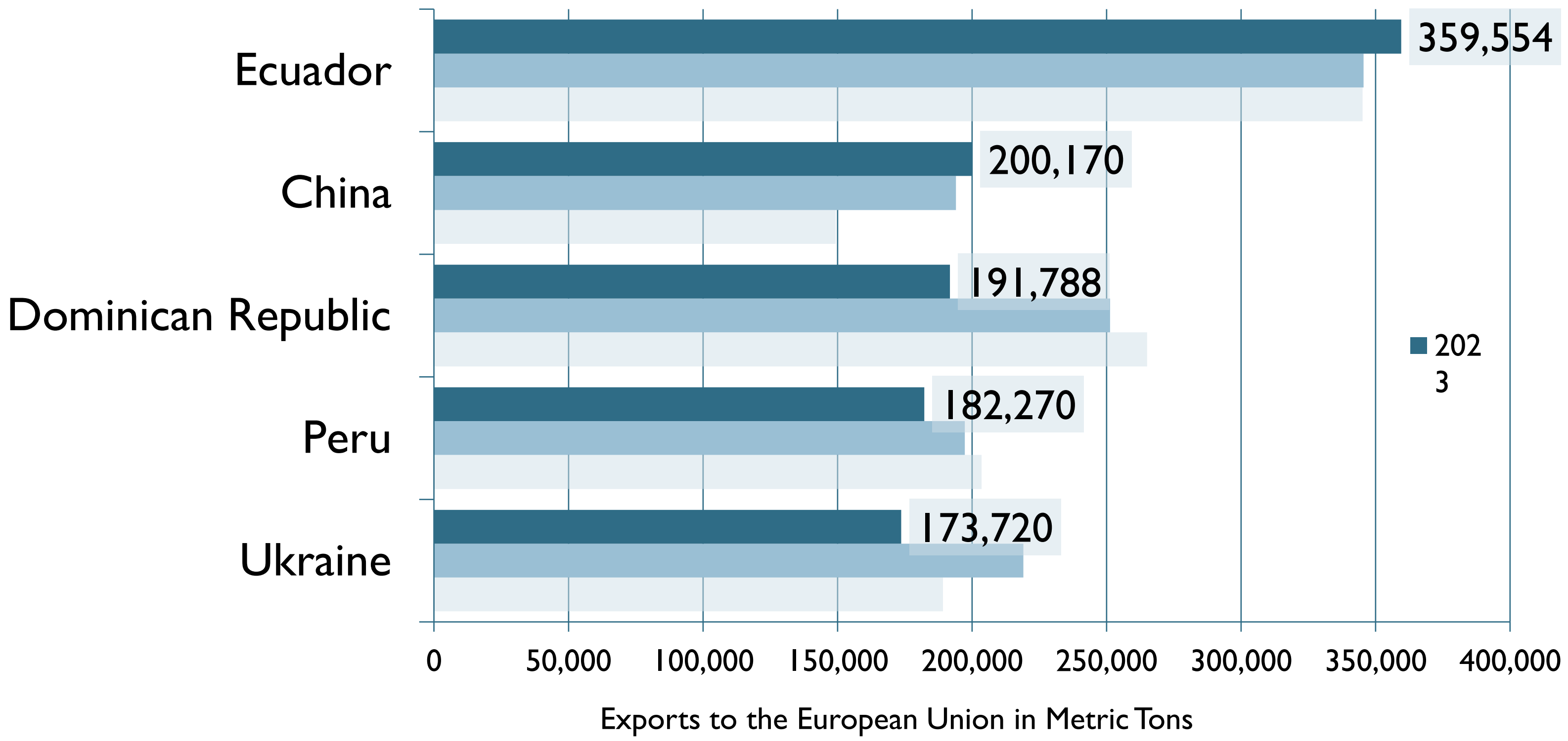


DECLINE In 2023: "Most of this decline can be attributed to the reduced imports of fruit and vegetables, sugar, olive and palm oils, sunflower seed, and pet food.

Increases in imports of organic soybeans, oilcakes, citrus fruit, rice and honey did not compensate". (European Commission/TRACES)

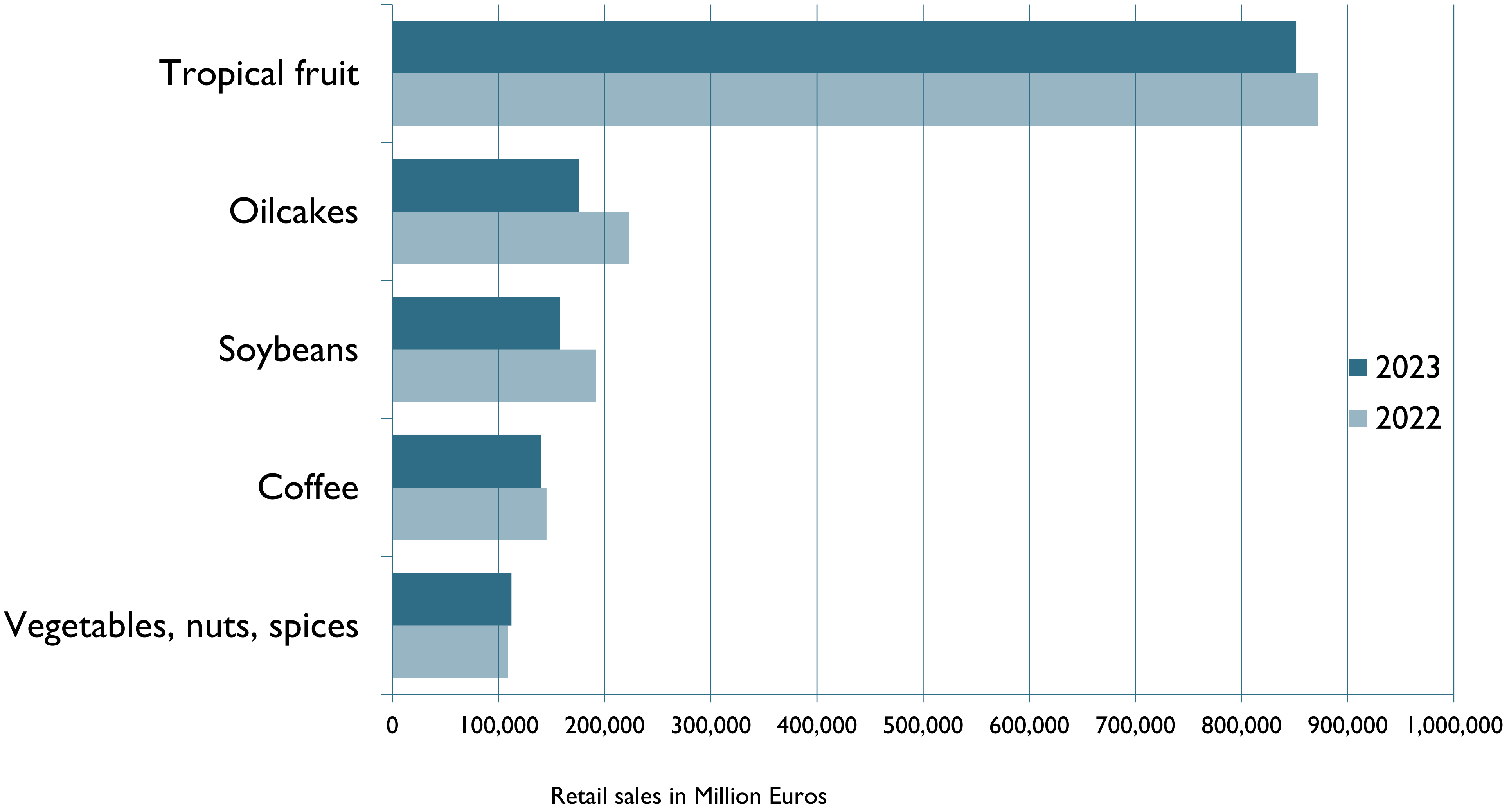
Geopolitical conflicts and weather extremes are having an impact on EU organic imports

Top 5 exporting countries 2021, 2022, 2023 compared
Source: European Commission TRACES 2024



Top 5 export products 2022 and 2023 compared

Source: European Commission/TRACES 2024



Conclusion

- 2020 cannot be considered as a reference year → steady growth between 2019 and 2024
- Although consumers remain willing to buy more organic products, inflation has impacted spending power – markets are recovering, but may not have fully recovered depending on the country
- European consumers reduced spending on food overall in 2023 - organic consumers in the EU tended to choose a cheaper version of the same product (e.g. retailer's own label) or trade down to discounters
- Mixed picture at the start of 2024, but there is value growth in many EU markets as larger retailers see spending recover → positive recovery signs in specialized shops, e.g. IT and DE, as well as in larger retailers, e.g. Carrefour in FR
- Not all growth markets are seeing volume growth, but inflation in organic is often lower
- Out-of-home continues to be a success in many countries

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The principles of organic agriculture

Sustains and enhances
the health of soils, plants, animals, humans and our planet

Health

Builds on relationships
that ensure equity for our environment and our communities

Fairness

Safeguards
living ecological systems and cycles by working with them, not against them

Ecology

Protects the wellbeing
of current and future generations and ecosystems

Care

*Read more about the four principles of organic agriculture here.

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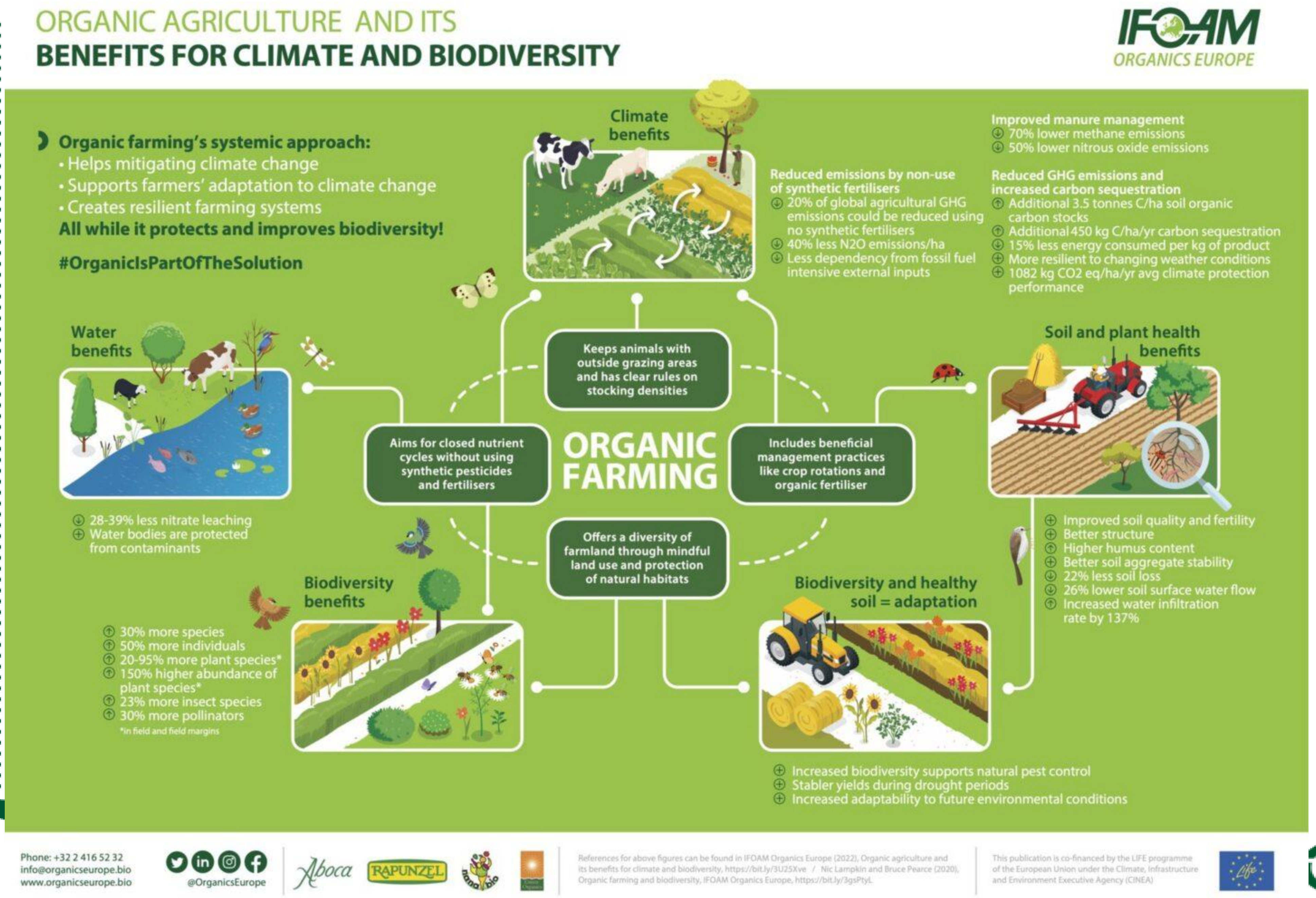
ORGANIC AGRICULTURE AND ITS
BENEFITS FOR CLIMATE AND BIODIVERSITY
IFOAM ORGANICS EUROPE
Organic farming's systemic approach:
• Helps mitigating climate change
• Supports farmers' adaptation to climate change
• Creates resilient farming systems
All while it protects and improves biodiversity!
#OrganicIsPartOfTheSolution
Climate benefits
Reduced emissions by non-use of synthetic fertilisers
20% of global agricultural GHG emissions could be reduced using no synthetic fertilisers
40% less N2O emissions/ha
Less dependency from fossil fuel intensive external inputs
Improved manure management
70% lower methane emissions
50% lower nitrous oxide emissions
Reduced GHG emissions and increased carbon sequestration
Additional 3.5 tonnes C/ha soil organic carbon stocks
Additional 450 kg C/ha/yr carbon sequestration
15% less energy consumed per kg of product
More resilient to changing weather conditions
1082 kg CO2 eq/ha/yr avg climate protection performance
Water benefits
28-39% less nitrate leaching
Water bodies are protected from contaminants
Keeps animals with outside grazing areas and has clear rules on stocking densities
Aims for closed nutrient cycles without using synthetic pesticides and fertilisers
ORGANIC FARMING
Includes beneficial management practices like crop rotations and organic fertiliser
Offers a diversity of farmland through mindful land use and protection of natural habitats
Soil and plant health benefits
Improved soil quality and fertility
Better structure
Higher humus content
Better soil aggregate stability
22% less soil loss
26% lower soil surface water flow
Increased water infiltration rate by 137%
Biodiversity benefits
30% more species
50% more individuals
20-95% more plant species*
150% higher abundance of plant species*
23% more insect species
30% more pollinators
*in field and field margins
Biodiversity and healthy soil = adaptation
Increased biodiversity supports natural pest control
Stabler yields during drought periods
Increased adaptability to future environmental conditions
Phone: +32 2 416 52 32
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www.organicseurope.bio
@OrganicsEurope
Aboca
RAPUNZEL
References for above figures can be found in IFOAM Organics Europe (2022), Organic agriculture and its benefits for climate and biodiversity, https://bit.ly/3U25Xve / Nic Lampkin and Bruce Pearce (2020), Organic farming and biodiversity, IFOAM Organics Europe, https://bit.ly/3gsPtyL
This publication is co-financed by the LIFE programme of the European Union under the Climate, Infrastructure and Environment Executive Agency (CINEA)

SUSTAINABLE DEVELOPMENT GOALS

1 NO POVERTY

A sustainable shift to organic agriculture and agroecology can strengthen the livelihoods of farmers and vulnerable groups, in particular women.

2 ZERO HUNGER

Increasing and stabilizing yields, improving resistance to pests and diseases, and battling poverty through reducing debt incurred by the purchase of expensive chemical inputs.

3 GOOD HEALTH AND WELL-BEING

Supporting farmers in applying holistic practices that prevent the use of polluting synthetic inputs, which means a significant contribution to reducing their harmful effects on people and the planet and contributes to good health & wellbeing for all.

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

Creating virtuous value chains and fostering the local economy, for instance through short organic value chains, public food procurement, and Participatory Guarantee Systems.

15 LIFE ON LAND

Organically managed lands host up to 30 percent more species than non-organic farms.

IFOAM ORGANICS EUROPE

SUSTAINABLE DEVELOPMENT GOALS

From problems	To solutions
Greenhouse gas emissions	Carbon sequestration
Soil erosion	Soil fertility
Water crisis	Water retention
Biodiversity loss	Agro-biodiversity
Poverty	Rural incomes
Lack of information	Access to information
Inequity	Equity
Inefficient Policies	Sustainable policies

Using our principles

- Health, Ecology
- Ecology, Care
- Fairness, Care
- Ecology, Fairness

IFOAM ORGANICS EUROPE

Strategic dialogue

- January-August 2024, initiated by VDL during 2023 state of Union speech
- 29 Members
- Context: polarization stemming from structural issues, impact of the war in Ukraine, the opposition towards environmental and climate legislation, farmer's protest

- VDL presented on 4 September the report
  - Consensus by all participants
  - Majority of members had a very positive communication, but already a lot of criticism from national farmer unions (COPA-COGECA members)

- Should be basis for agri-food vision

See **IFOAM OE briefing** for more information

IFOAM ORGANICS EUROPE

Key take-aways from SD report

- Clear **recognition of organic farming** as the leading legally regulated sustainability systems (actions to strengthen organic: promotion through marketing and public procurement, CAP to support the conversion and maintenance of organic, advice and training, education, research and development and animal welfare labelling).
- Proposal for a new **CAP**: targeted income support (those ‘who need it’), decoupling of environmental conditionality from income support, based on quantifiable outcomes, ringfencing for environmental measures, real incentive going beyond cost incurred, income foregone
- Strengthening farmers’ position in the supply chain to avoid selling products systematically below production costs (assess **UTP** implementation, support **CMO Art 210a** implementation).
- Benchmarking system and development of consistent methodology.
- Establishment of a governance structure: European board on agri-food (**EBAF**).

Common Agricultural Policy

- IFOAM Organics Europe published its position paper on the vision for the next CAP: "A CAP fit for the future, the vision of the organic movement for the CAP post 2027"
  - Press release of the 10th of September, opening of the European Organic Congress and publication of the Position Paper
  - Organic vision of the next CAP → in line with the recommendations of the SD

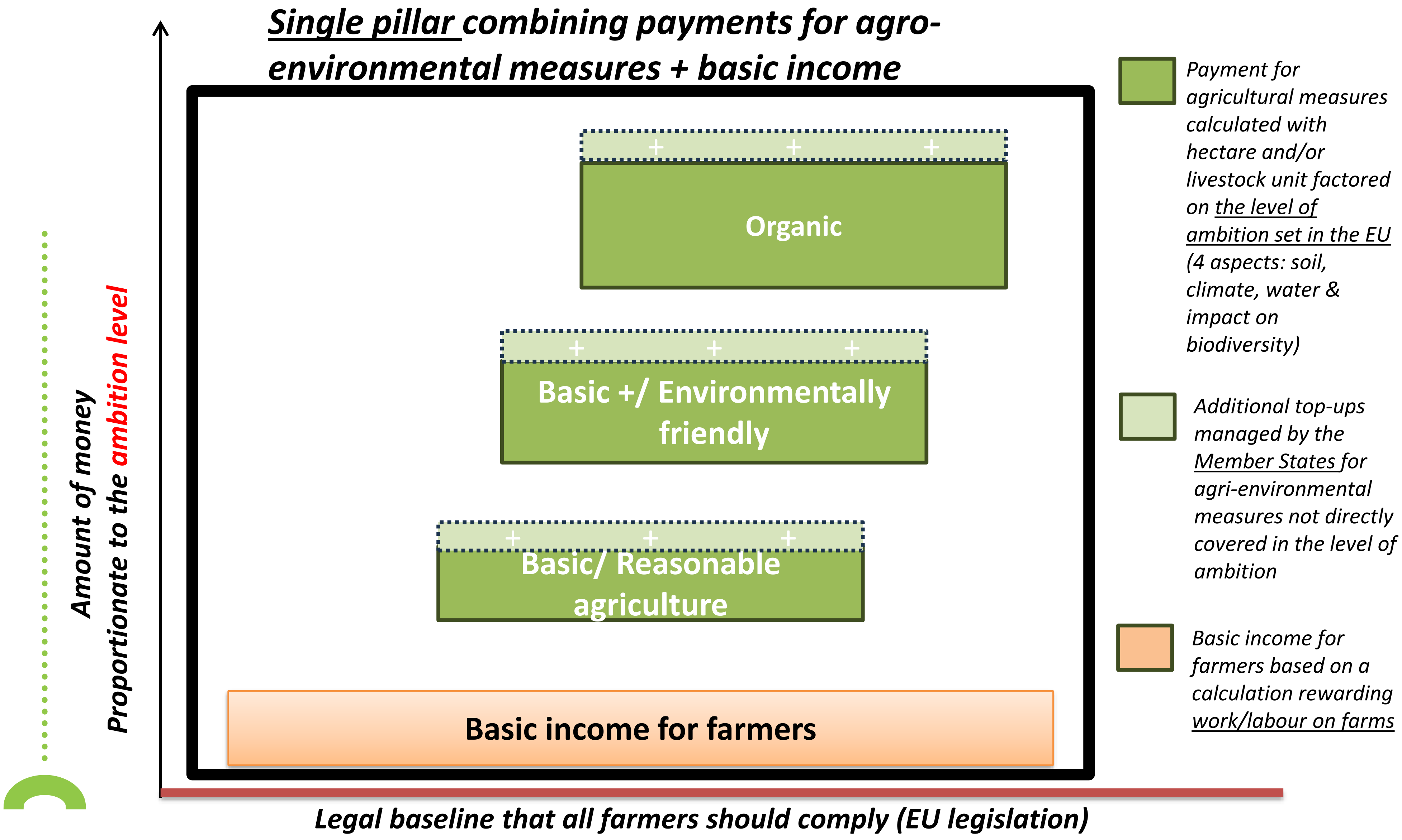
IFOAM ORGANICS EUROPE

Common Agricultural Policy

Key takeaways from the CAP Conference in Budapest & the EOC

- The Strategic Dialogue concluded that we need to maintain the CAP and its budget, but that it is time to change it and to move away from untargeted hectare-based payments.
- The next CAP should address the two priorities of social support and incentivization for farmers to adopt more sustainable practices separately. A share of the CAP should be dedicated to income support for the farmers who need it the most, and this will be discussed taking into account the diversity of farms and sectors across Europe. Another share of the CAP should be dedicated to remunerating farmers who protect and restore ecosystems services, and this share should gradually increase over the next two CAP reforms, starting at the current share of 32%. But additional money outside the CAP will be needed.
- Flexibility, incentives and an **outcome-based system** are better that the current prescriptive measures. The CAP should be result-based payments, but important to make sure that this does not end up with more complications for farmers, and taking into account certified systems could avoid this complication.
- Sustainability will be assessed according to a **benchmarking** system, that will need to go beyond narrow product-based efficiency measurement and take into account all the positive and negative externalities of different production systems.
- Legislation, incentives, and investments are needed.
- Market regulation tools, crisis management tools, transparency on margins and prices are important to strengthen the position of farmers in the production chain.
- Farmers should be protected from trade agreements that allow imports of agriculture products that do not follow the same standards as in the EU.

New Green & Fair CAP structure



date

Organic insect production rules

- Regulation (EU) 2018/848 – livestock production defined as including insects
- EGTOP (Expert Group for Technical Advice on Organic Production) Terms of Reference – 2022 April Subgroup on Insects for Food and Feed
- Draft text circulated for feedback 2022 December
- Report is close to be finalized
- EGTOP Plenary 2024 2-4 December aims to get the report finalized

Organic insect production rules - content

- Terminology
- Concept of holdings for food and feed
- Mixed holdings
- Conversion rules
  - Origin of animals
- Nutrition:
- origin of feed – own/agreements, in-conversion
- Availability of organic feed
  - by-products from organic crop/livestock production, waste of organic origin, preferential order in case of non-availability
- Housing and husbandry
  - Technical requirements
  - Densities minimum surface
- Health care
- Animal welfare
- Collection and disposal of frass

Organic insect production rules

Advantages and disadvantages of of use of insects as organic feed compared to other sources of protein feed for poultry, porcine animals and aquaculture

Aquaculture

- Future EU Aqua project seeking the potential in alternative organic protein sources

Young pig/poultry

- 5% derogation on the use of conventional protein feed
- More qualitative then quantitative problem, and basically for poultry

Thank you for your attention!

IFOAM Organics Europe \

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