

# SLOVENIA



Report on the situation of  
organic agriculture and food  
business in Slovenia

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Gefördert durch



aufgrund eines Beschlusses  
des Deutschen Bundestages

# Imprint

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This report has been prepared to the best of our knowledge and belief. We cannot however accept any guarantee for the accuracy, correctness or completeness of the information and data provided.

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# General

## Map

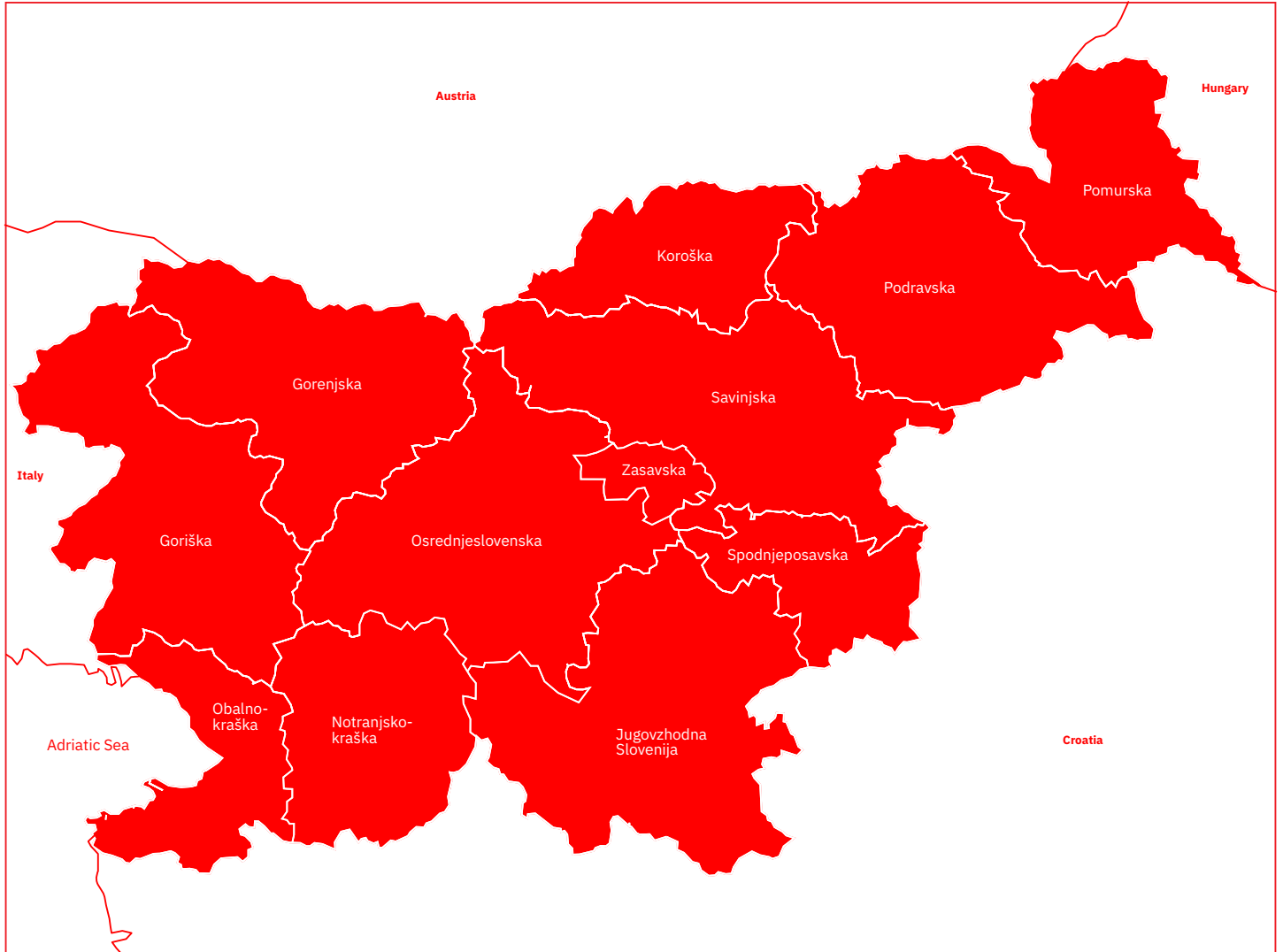


Figure 1: Map of Slovenia

## Facts & Figures

**20,273** km<sup>2</sup>

Land area

**2.1** m

Population

**104** Inhabitants per km<sup>2</sup>

Population density

**Euro** €

Currency

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## Slovenian

Business languages (regionally also Italian and Hungarian)

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**29,192.85** USD

GDP per capita

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**2.4** persons

Average household size

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**USD 61.57** billion

Gross domestic product

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**2 %**

Share of agriculture, forestry and fisheries in GDP

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**494,641** ha

Utilised agricultural area

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## Climate and Soil

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Slovenia lies to the south of Italy and Austria, west of Hungary and borders Croatia to the south. Although Slovenia, with its 20,000 km<sup>2</sup>, is one of the smallest countries in the EU, it has a very diverse landscape.

About 1 / 3 of the country's surface is covered by the Southern Alps. The mountains stretch from east to west, starting with the Steiner Alps, over the Karawanken to the Julian Alps.

The highest point in Slovenia is the peak of Triglav, which is 2864 metres high. The lowest point of the country is on the 46 km long Adriatic coast.

Slovenia is divided into different climate zones. In the north of the country, on the southern flank of the Alps, there is an Alpine climate with transitional periods of high precipitation, cold winters and hot summers.

On the Adriatic coast, on the other hand, the climate is Mediterranean. Hot summers and cool, wet winters prevail. Spring begins here in March and in May temperatures already reach midsummer levels. Between the mountains and the Adriatic Sea lies the Karst region. Here the climate is mildly continental European.



Figure 2: Small plots near Ljubljana

# Characteristics of Agriculture in Slovenia

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After the end of the Second World War, attempts to collectivise agriculture failed. In contrast to most Eastern European countries, small-scale farming structures have remained. More than 90 % of the farms are family farms. In 2021 the share of agriculture in GDP is 1.8 %. Due to the enormous forest area in Slovenia, the usable agricultural area is only about 30 % of the country. Of this area, about 70 % is located in disadvantaged areas.

It is therefore not surprising that a very high proportion of agricultural land is used as permanent grassland. Like in other Alpine countries, alpine farming is still common practice in Slovenia. The Allmenden areas were abolished in 1947, nationalised and reactivated in 1994. In 2016, 177 alpine pastures are still active, of which 114 are agricultural communities. (Der Alm- und Bergbauer 8–9 / 2016)



Figure 3: Landscape in Slovenia rather unsuitable for agriculture

## Self-Sufficiency / Trade Relations

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In 2020, Slovenian households spent 14.3 % of their financial resources on food. This corresponds to the European average.

The self-sufficiency rate for cereals in Slovenia was 88 % in 2020, whereas for meat it was 84 %. Slovenia is poorly supplied with vegetables. Here, the degree of self-sufficiency is 4 %.

Imports of grain and maize come mainly from Hungary and Croatia. Meat is supplied by Italy, Austria, Hungary and Germany. Dairy products come from Austria, Hungary and Germany. Fruit and vegetables are purchased throughout Europe, potatoes are sourced from Egypt. The total volume of food and beverage imports into the Republic of Slovenia in 2021 was 2.3 million tonnes.

# The Slovenian Eco-Sector

Organic farming in Slovenia originated from private initiatives of allotment gardeners, farmers and people interested in environmental and nutritional issues in the 1980s. As a result, associations and marketing organisations were founded. Institutionalisation and promotion followed after accession to the EU.

## History

Due to the small-scale farming structures and the extensive farming methods of the farms, the step towards organic farming is only a very small one. At the end of the 1980s an association was founded, consisting mainly of allotment gardeners who were interested in biodynamic agriculture. This association developed into the first Slovenian organic association with the name **Ajda**. Initially there were only a few farmers involved, but allotment gardeners and people with an interest in healthy food and environmental protection. The activities of this association were an important contribution to the development of organic agriculture in Slovenia. In the following years, more organic associations were

founded by farmers. As these farmers had an interest in marketing their products, certification systems were established. One association set up its own control system, another worked together with the Austrian control system of **Austria Bio Garantie** and the organic-dynamic farms were certified by German inspectors.

Organic producers received national financial support in the form of direct payments per hectare from 1999 and later under the Slovenian Agri-environmental Programme. After joining the EU, organic farmers were eligible for payments through the Rural Development Programme.

In 2005, the inspection was organised according to EU standards and some of the then organic associations became today's inspection bodies.

## Legal Framework

Organic farming in Slovenia is regulated by the EU BIO Regulation. The EU regulations (EC) 834 / 2007 and (EC) 889 / 2008 were valid until 31.12.2021. These regulations set out the principles and detailed rules for organic farming. In 2014, the EU legal reform for organic farming was initiated. The result of many years of discussion was a new regulation on organic farming, which was adopted in 2018.

Regulation 2018 / 848 came into force on January 1, 2022 and has since regulated organic farming in Europe and so also in Slovenia.

The ordinance was supplemented by several new areas of applicability. For example, the production of beeswax, sheep's wool, animal hides and skins is regulated. Furthermore, the regulation places a special focus on the welfare of animals in organic farming. For example, it is no longer permissible to carry out the final fattening of bulls in stables without outdoor access. In addition, herbivores must be allowed to graze.

In order to ensure the implementation of the European Union legislation on organic farming, the Republic of Slovenia has adopted the "Regulation on Organic Farming".

The Republic of Slovenia has adopted the "Regulation on Organic Production and Processing of Agricultural Products and Foodstuffs" (Official Gazette of the Republic of Slovenia, No. 105 / 22).

For Slovenian organic products, producers can use a national logo in addition to the EU organic logo.



Figure 4: Slovenian organic label and EU organic label

## Checkpoints

In Slovenia, 4 inspection bodies are currently approved to carry out organic inspections.

### Kon-Cert: Institute for Agricultural and Forestry Control and Certification Maribor



The Kon-Cert Institute is authorised to certify organic producers and organic processors. The institute also carries out **Demeter** controls.

[www.kon-cert.si](http://www.kon-cert.si)

### IKC Institute for Control and Certification UM



IKC - The UM Institute for Control and Certification is a certification body that operates as an independent and non-profit organisation. Its activities focus on the certification process of agricultural products and foodstuffs with the aim of strengthening consumer confidence in agricultural products and foodstuffs.

[www.ikc-um.si](http://www.ikc-um.si)

### Bureau Veritas



Bureau Veritas is a professional service company with almost 200 years of tradition. Bureau Veritas has many years of experience in the inspection of organic production. Bureau Veritas has been appointed as inspection organisation by many producers, processors and importers of organic products and foodstuffs with more than 3500 producers and 1500 processors from all over the world.

[www.bureauveritas.si](http://www.bureauveritas.si)

### TÜV SÜD Sava d.o.o



Certification of organic producers: farmers; certification of organic processing, including: processing plants, traders, dealers and importers; certification of organic food preparation in public food establishments for: Caterers, hoteliers, tourist establishments.

[www.tuvsud.com/sl-si](http://www.tuvsud.com/sl-si)



## Teaching and Research

The **Naklo Biotechnical Centre** houses a secondary school, a technical college and an institution for adult education. The main fields of study are agriculture, horticulture, nature conservation, agricultural technology and food processing. The Naklo education and research institution has 23 hectares of cultivated land, a dairy and various agricultural buildings, including greenhouses, stables and a bee house. What is special about this educational institution is that it is ecologically certified. Only organically produced products are marketed in the facility's own shop.

The **University of Maribor** offers a Bachelor's degree programme in organic agriculture. Students can acquire knowledge from various agricultural fields, with a focus on ecological topics. The knowledge acquired is interdisciplinary and includes content from different areas such as food processing, ensuring a continuous local food supply and tourism. Part of the course focuses on solutions to practical problems that students will encounter in their own agricultural enterprises or in commercial, distribution or private enterprises. They will be qualified to advise on the conversion of farms to organic farms and on work in protected parks or nature reserves.



Figure 5: University of Maribor

## Supporters and Actors of Organic Farming

The **Institute for Sustainable Development ITR** was founded as a private, non-profit institute. Its mission is to achieve sustainable development in agriculture and to promote the development of a living link between town and country.

The **Association of Organic Farmers of Slovenia ZDEKS** was founded on 24 September 2017 in Slovenj Gradec. It emerged from several regional organic farmers' associations and thus represents the organic farming sector throughout Slovenia. The association is part of the IFOAM group.

**Ekoport** is a website that brings together organic farmers and potential consumers. You can find direct marketers by product and location. There is even the possibility of app to be able to use the application on the move. Furthermore, information for consumers about organic farming is provided.

### Info

#### BC Naklo – Biotechnical Centre Naklo



[www.bc-naklo.si](http://www.bc-naklo.si)

#### University of Maribor – Faculty of Agriculture and Life Sciences



[www.um.si](http://www.um.si)

#### Institute for Sustainable Development

Inštitut za trajnostni razvoj

[www.itr.si](http://www.itr.si)

#### Association of Organic Farm- ers Slovenia – ZDEKS



#### Ekoport



[www.ekoport.si](http://www.ekoport.si)

The **demeter** Slovenia Association represents the group of all Demeter enterprises in Slovenia, producers, processors and traders as well as experts. Its mission is to expand biodynamics and increase the visibility of the Demeter brand in Slovenia among both producers and consumers, thus protecting the health of people, plants and animals while conserving valuable natural resources.



Figure 6: Demeter market stalls at the weekly market in Ljubljana



Figure 7: Slovenian beef in the supermarket

## Info

Demeter Slovenia Association

[www.demeter.si](http://www.demeter.si)



Ekodar

[www.ekodar.si](http://www.ekodar.si)



# Production of Plant and Animal Raw Materials

Since joining the EU, the number of organic farms and thus the organic area under cultivation has risen continuously. An enormous increase could be seen in the period up to 2015. In the following years, the number of organic farms developed only slowly and even declined in 2020.

## Certified Areas and Farms

Similar to the rest of the EU, the organic area in Slovenia has increased over the last 10 years. With a current share of organic land of about 11 % of the total agricultural land, Slovenia is in the average of all EU countries. It has a similar level as Slovakia, Spain, Denmark and Greece. The special feature of Slovenia's organic area is the enormous proportion of grassland (83 %). The average farm size in Slovenia is 13 hectares. This is far below the EU average of 30 hectares. Although the area under organic control has slightly increased, the number of organic farms has decreased to 3724 farms in 2021.

## Organic Crop Production

The high proportion of grassland in Slovenia's organic area is hardly surprising given the geographical conditions. In recent years, Slovenia has created incentives with the Rural Development Programme to help grassland farms.

Almost 5000 hectares are used for agriculture.

However, even on this 9 % of the total organic area, plants are mainly grown for animal feed. Only a small part is actually used to produce food. This is probably due to the fact that organic farms are mainly located in geographically and climatically disadvantaged areas.

Ecological share by region (2022)

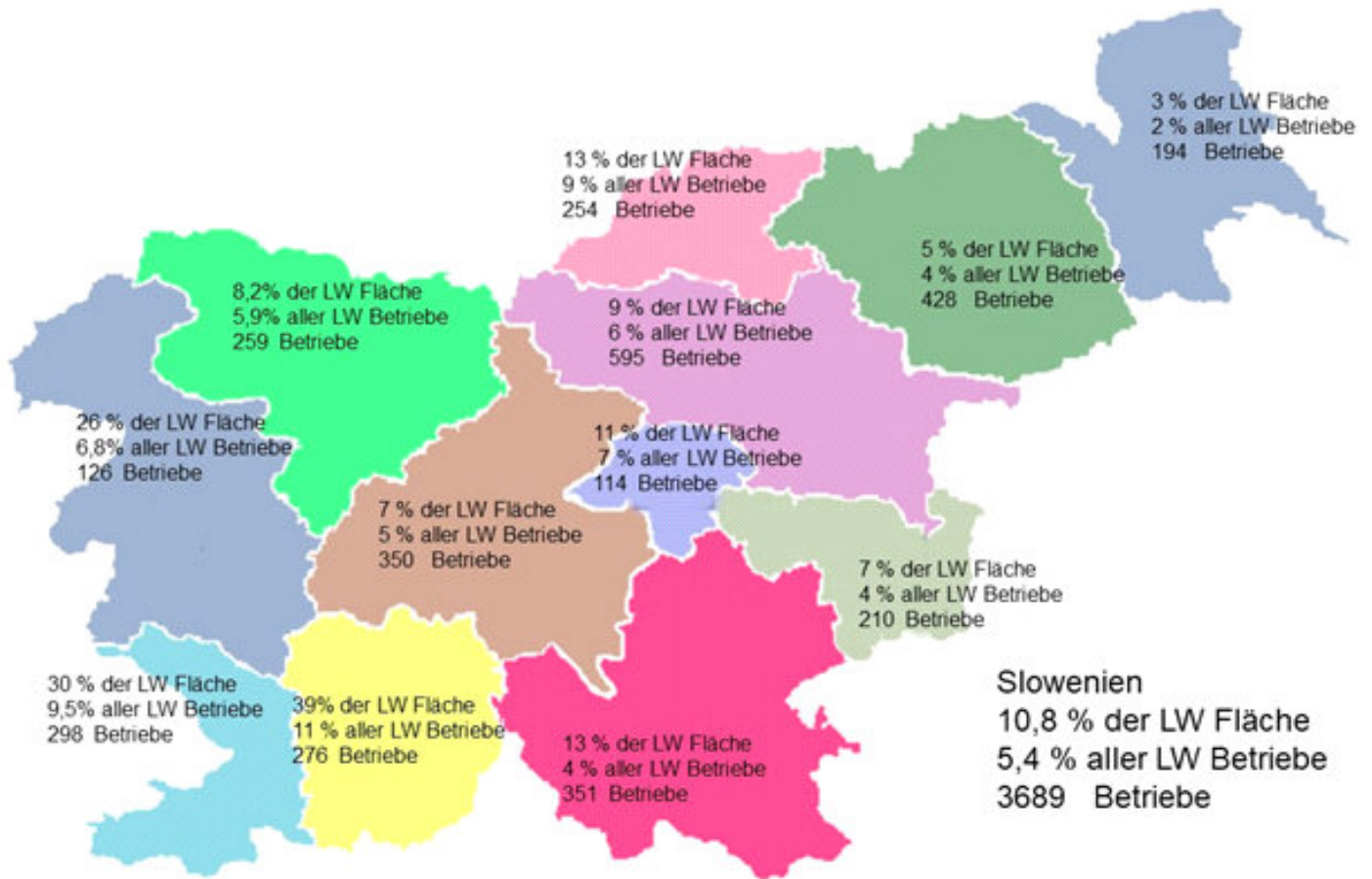


Figure 8: Distribution of organic farms by region

Where cash crops are possible, the share of organic farms is very low.

In conventional agriculture in Slovenia, the share of grassland is only 58 %. This fact can be seen as a further indication that organic farms in Slovenia have a poor starting position.

Of course, organic farms are also present in the exposed areas. In Slovenia, vegetables were grown on 338 hectares in 2021. Fruit is grown organically on 1500 hectar, half of which is intensively used, the other half are orchards. In the Mediterranean areas of Slovenia there are 310 hectares of organic olive trees. There has been a continuous moderate increase in this area in recent years, as in viticulture. In 2021, 862 hectares of vineyards were cultivated - here, too, the trend is upwards.

About 50 farms have undergone Demeter certification in addition to EU organic certification. These farms are mainly winegrowers, vegetable farmers and smaller mixed farms.

## Organic Animal Husbandry

In order to make optimal agricultural use of grassland, ruminants are needed. They maintain the areas by preventing scrub encroachment and optimally utilise the raw fibres they digest. In this way, protein is produced in the form of milk and meat, which can be used for human nutrition. Consequently, many ruminants are kept organically in Slovenia. However, sheep and goats make up the largest part.

Approximately 25 % of all sheep and goats kept in Slovenia are organic. 8 % of all cattle in Slovenia are kept organically.

The number of organic cattle has increased to 38,000 animals in recent years.

Poultry farming has also seen a huge increase. Compared to 2007, the number of animals kept in 2020 has risen to 88,000, an increase of 375 %. The organic share of poultry, pigs and beehives kept in Slovenia is only 1.5 %.

## Production of Plant and Animal Raw Materials

### Organic products of some important crops (2021| tons)

<b>Total cereals</b>	<b>5,865.84</b>
of which wheat and spelt	2,045.84
thereof barley	812.45
thereof oats	622.51
thereof grain maize	1,362.84
<b>Root crops</b>	<b>1,509.82</b>
thereof potatoes	1,335.90
<b>Industrial plants</b>	<b>297.78</b>
thereof oilseeds	211.46
Vegetables, melons and strawberries	1,963.25
<b>Green harvested plants</b>	<b>17,568.14</b>
thereof silage maize	1,434.00
of which temporary grasses and pastures	8,670.69
Production of permanent pasture	98,818.31
Fruit	1,327.11
Grapes	2,034.21
Olives	314.87

Figure 9

### Organic products of animal origin (2021| tons)

<b>Carcass weight – TOTAL</b>	<b>457.39</b>
Cattle	407.60
Pigs	22.63
Sheep	1.52
Goats	-
Poultry	25.19
Horses	0.30
other animals	0.15
<b>Milk production – TOTAL</b>	<b>8,236.27</b>
Cow's milk	7,842.83
Sheep's milk	173.26
Goat's milk	220.18
Honey	32.18
Consumption eggs (number)	12,547.262

Figure 10

## Import / Export of Raw Materials

Organic raw materials from third countries come to 60 % from Turkey, Israel and Serbia. However, it should be noted that some products are imported into the country for further transport to other European countries. Bananas and cane sugar are imported from Ecuador, Paraguay and Brazil. One processor imports rosemary from Tunisia to export it as rosemary extract for the food industry. Since organic farming in Slovenia is very small-scale and little grain is grown, it can be assumed that no raw materials produced in Slovenia are sold abroad.

Processed foodstuffs are also exported very little. One exception, apart from rosemary extract, is organically produced wine. Slovenia has some very excellent organic wineries that also market their wine abroad. (IRSA 2022)

## Processing

In Slovenia, 139 processing plants were certified organic in 2020. In the period after 2010, the number of processing plants increased continuously.

In 2017, it reached its peak of 375 organically certified farms. In the following years, the number decreased by more than half and is now back at 139 farms. Among other things, the farms process wine, juices, pasta, bakery products, oil, meat products and, to a lesser extent, dairy products.



Figure 12: Organic products in the supermarket, only the yellow peppers are from Slovenia



Figure 11: Slovenian wine partly with Demeter certification

# The Organic Market

The market for organic products has grown strongly in the past 10 years with growth rates of 10–15%. The market share of organic products in the Slovenian retail sector is around 3–4% and is estimated at a total turnover of 110 million euros estimated (IRSA 2022).

40% of the products from Slovenian producers are sold directly from the farm. About a quarter of the food is also sold via direct marketing such as weekly markets, internet shops and home deliveries. Another 20% is marketed through cooperatives, marketing associations or directly to processing companies such as slaughterhouses, dairies and mills. The remaining 30% is marketed conventionally. Slovenian organic products are only sold to a small extent in retail, public institutions or gastronomy. According to an estimate by ISRA (2022), the total volume of Slovenian organic products for the year 2021 is € 55 million.

As the farms are rather small with an average of 13 ha, it is difficult for them to get their products into the retail trade. In order to market Slovenian organic products, there are various initiatives in which farmers have joined forces to jointly market their products. For example, the company **Eko Prlekija** was founded in 2017 from 8 founding members. Today, the company has grown to 47 members and markets the products of about 800 ha via an online shop. They not only supply private customers, but also public ones. (↪) The **cooperative Dobrina z.o.o.** was founded in 2011. Not to make a profit, but to enable fair trade in food and to ensure that producers are paid fairly.

At the same time, the cooperative aims to link the rural area with the urban centre, to promote and encourage organic farming, the principles of sustainable local food supply and social entrepreneurial activities in the

field of food production and processing, as well as the preservation of the cultural, technical and natural heritage in the field of agriculture.

The cooperative supplies local food to a number of catering businesses. It offers its products to the residents of Maribor through a subscription box system, an online shop, a shop and also as catering.

In addition to the marketing channels just mentioned, the complete range of organic products is available in food retail in Slovenia. However, these are only of Slovenian origin to a very small extent. The majority is imported. Almost all traditional organic brands from Germany and Austria are represented, such as **Bauckhof, Wertz, Sonnentor, Spiegelberger, boydo, Zwergenwiese** and many others. The drugstores also market most of their own-brand organic products with German labels.

## Info

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### Eko Prlekija

[www.ekoprlekija.si](http://www.ekoprlekija.si)

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### Genossenschaft Dobrina z.o.o.

[www.zadruga-dobrina.si](http://www.zadruga-dobrina.si)

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According to a recent study, the share of organic food in total food and beverage sales is estimated at 3 – 4 %. This corresponds to the European average.



Figure 13: Sales shelf Cooperative Dobrina z.o.o.



Figure 14: Vegetables in the Dobrina z.o.o. cooperative.

In food retailing, the percentage of non-Slovenian organic products is 85 – 90 %, which means that only 10 – 15 % of local organic products are available in supermarkets. Many supermarkets stock Slovenian organic wine, oil (hemp, olive) and sausage.

The per capita consumption of organic food is estimated at 70 € per year. This value is also in the middle range in an EU comparison.

In Slovenia, there is a law that stipulates that 15 % of the catering in public institutions should consist of organic products. These requirements are currently not fully complied with, the organic share in public institutions is at 13 %. The share of Slovenian organic food here

is 40 %. Slovenian organic food is again at a disadvantage here, as the institutions have problems sourcing local organic goods.



Figure 15: Natural food shop with some European organic brands

## Investment Potential

Slovenia is considered the gateway to the Balkans due to its location and good relations with neighbouring countries. The high purchasing power and good economic performance of the country make Slovenia an interesting investment location for German companies.

The investment potential of German organic players in Slovenia holds little chance of success. One reason is the small-scale structure of Slovenian agriculture. It is therefore rather difficult to make an economically sensible investment in Slovenian land.

It is true that some of the organic products sold in Slovenia are imported from abroad. This is organised by the retail chains themselves. For example, Slovenian drugstores sell products that were packaged and labelled in Germany.

As part of the plan to expand organic agriculture, the Slovenian government will launch an advertising campaign to make the country's own organic products palatable and trustworthy to consumers. Many organic farms market their own products conventionally. If Slovenian organic products are intensively promoted, the demand for imported organic products will probably decrease. In addition, the energy crisis, the resulting inflation and the uncertainty caused by the Russian invasion of Ukraine are further obstacles.



# Conclusion

Organic farming in Slovenia has not yet fully realised its potential. So far, most organic farms are located in areas where farming has always been difficult (disadvantaged areas). In the high-yield areas, the share of organic farms is low. Here it would be quite possible to create further incentives through financial support and by promoting marketing structures.

Organic farming minimises the release of climate-damaging gases, promotes biodiversity and keeps the soil fertile. It has also been shown that organically farmed land has a better water retention capacity. This is a clear advantage with regard to global warming and the associated droughts.

Even though organic farms in Slovenia are very small and the marketing of their products is rather difficult, organic farming has great potential for Slovenia. There is hardly any other country in Europe with such a variety of small parcels of cultivated land and such an abundance of agricultural elements as Slovenia.

A large part of Slovenia's territory consists of protected areas. Thus, 269,475 ha (13.3 %) of the Slovenian territory are designated as protected areas, which are characterised by a rich and heterogeneous natural and cultural heritage. Slovenia has an enormous tourism potential, which attracts nature-loving guests who would like to visit certified organic restaurants and hotels.

For this reason, the Slovenian tourism industry has been advertising for several years with the slogan "Slovenia is the green heart in the middle of Europe" (↪).

With the **Action plan for the Development of Organic Farming** until 2027, the Slovenian government has set itself ambitious goals. It is planned to convert 10 % of farms and 18 % of agricultural land to organic

farming by 2027, with a focus on farms with marketable products. In order to achieve this, it is planned, among other things:

- to increase the Slovenian eco- share in public institutions,
- expand the counselling and education system,
- intensify research in organic farming with the establishment of demonstration farms as multipliers,
- Promote the development of cooperative marketing systems; and
- a promotional campaign to educate consumers about the benefits of Slovenian organic food.

Of course, the farms that are already certified organic must remain in the process. It is to be hoped that the negative tendencies that can be felt on the European market due to the energy crisis and inflation will not last too long, so that Slovenia can achieve its goals and thus take a leading position in organic farming in Europe.

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