Development of Organic Food Production in some European Countries

4th NJF Organic Conference
Jun. 19 - 21, 2017 in Mikkeli, Finland

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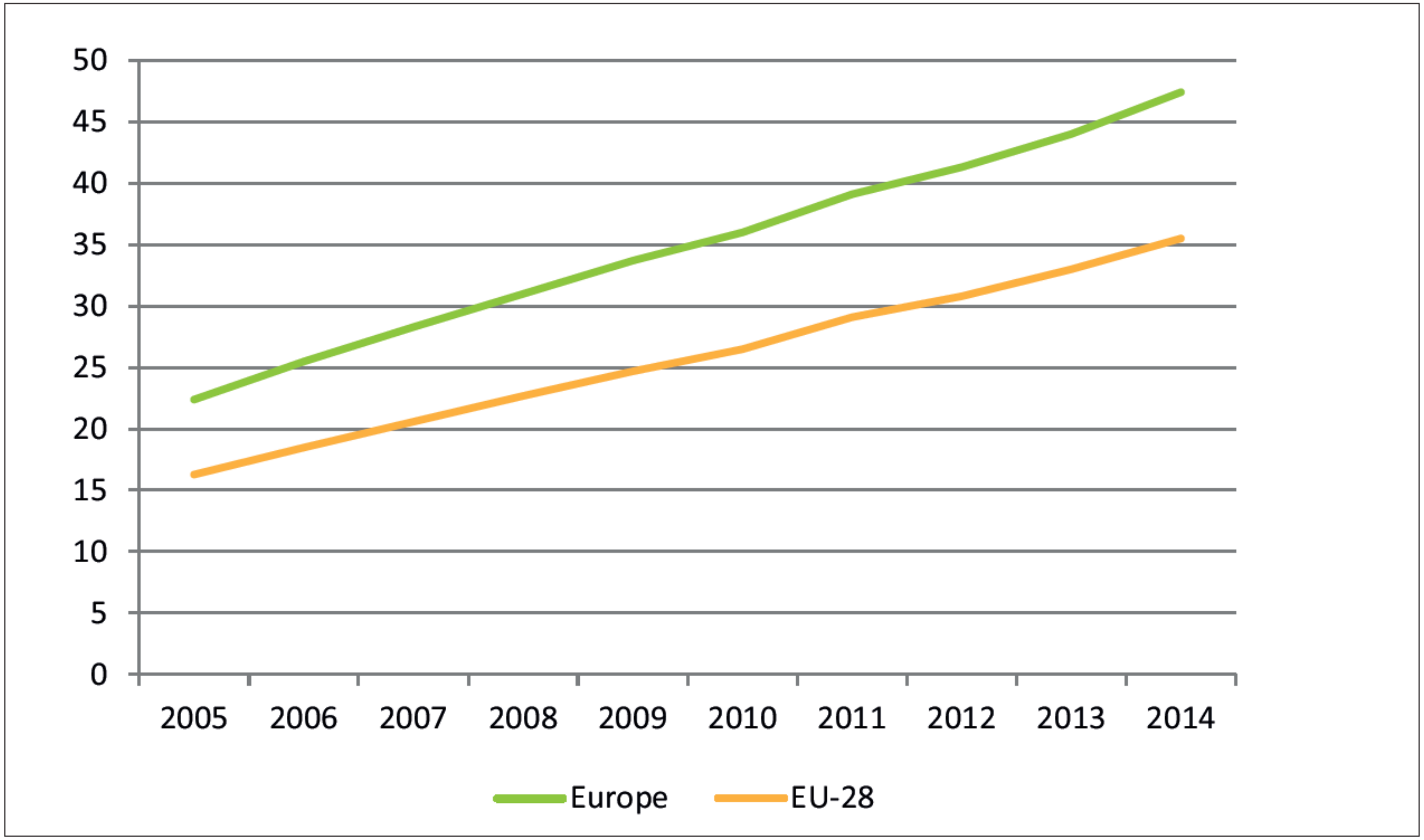
What, why and how?

- Ordered by the Finnish Ministry of Agriculture
- To draw a general picture of the development and the main factors behind it in eight different European countries
- Special attention was paid to measures most effective
- Main data: statistics published by Eurostat and Faostat, literature and interviews of some experts
- Coutries: Austria, Danmark, Estonia, France, Germany, Finland, Norway, Sweden
- Research group: Niina Kuuva, Jaakko Nuutila, Pirjo Siiskonen



Kuvio 4. Luomukulutus (e/hlö) ja Luomun kulutuksen (e/hlö) kehitys kehitys Euroopassa ja EU-28 maissa vuosina 2005-2014 (Meredith & Willer, 2016).

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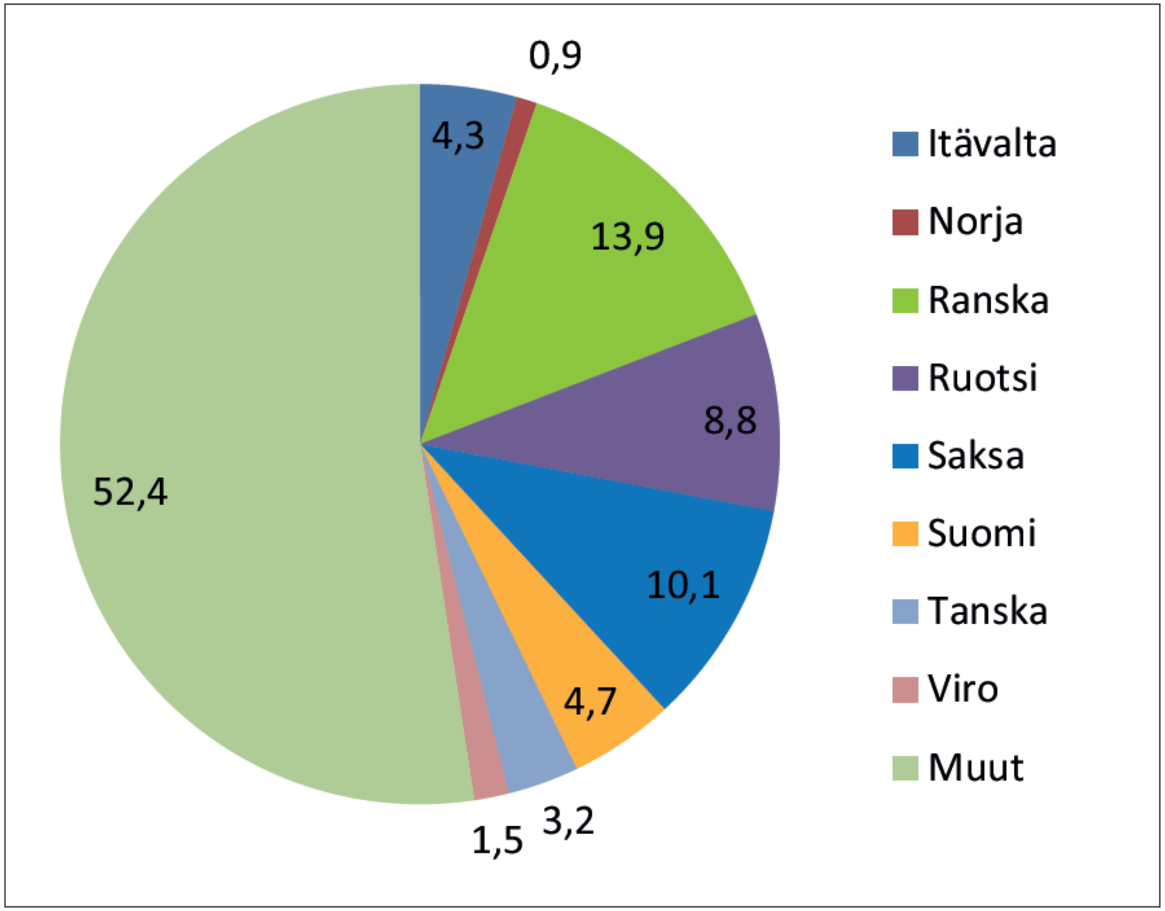
Comparing eight countries in production, prosessing, consumption and subsidices



Kuvio 7. Vertailumaiden luomualan osuus EU-28 maiden luomun kokonaispinta-alasta (%) (luomutuotannossa ja siirtymävaiheessa olevat) (Meredith & Willer, 2016)

Taulukko 3. Vertailumaiden tunnuslukuja luomusta vuosilta 2013, 2014 ja 2015 (Eurostat, 2016; Meredith & Willer, 2016)

	Suomi	Ruotsi	Norja	Tanska	Viro	Itävalta	Saksa	Ranska
Osuus tuotantoalasta (Siirtyneet ja siirtymäkausi) 2015 (%)	9,9	17,1	4,8	6,3	15,7	20	6,3	4,9
Tuotantoala (Mha) (Siirtyneet ja siirtymäkausi) 2015	0,23 Mha	0,52 Mha	0,05 Mha	0,17 Mha	0,16 Mha	0,55 Mha	1,06 Mha	1,36 Mha
Luomutilojen osuus 2013 (%)	7,4	7,8	5,2	5,7	8	14,8	6,3	4,8
Keskimääräinen tilakoko tavanomainen / luomu, 2013 (ha)	42/49	45/88	23/21	67/79	50/100	19/23	59/56	59/44
Luomutuottajien määrä 2014	4 284	5 584	2 452	2 589	1 553	21 863	23 271	25 467
Luomujatkojalostajien määrä 2014	531	787	351	633	110	----	----	10 088
Luomumarkkinat, 2014 M€	225	1,402	278	912	22	1,065 (2011)	7,910	4,830
Osuus koko elintarvikemarkkinoista 2014 (%)	1,7	6,0	1,5	7,6	1,6	6,5 (2011)	4,4	2,5
Kulutus / asukas 2014 (€)	41,3	145,4	54,4	162,1	16,9	127,0 (2011)	96,6	74,3

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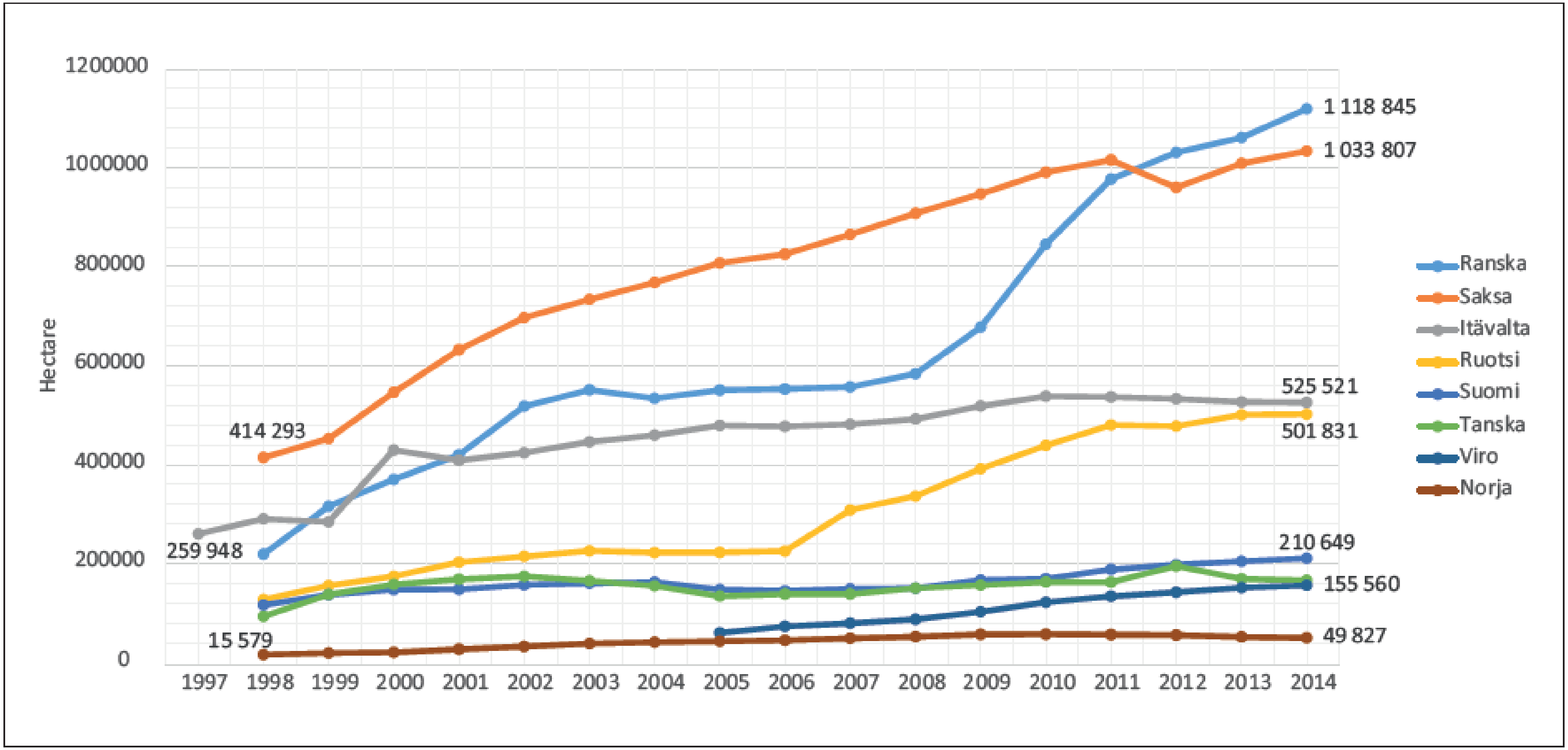

Kuvio 8. Luomupeltoalan (tuotannossa ja siirtymävaiheessa olevan tuotantoala yhteensä) kehitys selvityksen kohteena olevissa maissa vuodesta 1997 vuoteen 2014 (ha) (Eurostat, 2016)

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Taulukko 5. Vertailumaiden viralliset luomun kehittämisohjelmat (Meredith & Willer, 2016)

				Määrälliset tavoitteet		Tavoitevuosi
Maa	**Aikaväli**	**Aiempien ohjelmien määrä**	**Ensimmäisen ohjelman julkistus**	**Luomun osuus pelto-alasta**	**Luomun osuus markkinoista**	
Itävalta	2011-2013	4		20 %		2013
Norja	2009-2020	0	2009	15 %	15 %	2020
Ranska	2013-2017	2	2008	n. 8 %		2012
Ruotsi	0	1	1996	20 %		2014
Saksa	2002 läht.	0	2002	20 %		pitkä aikaväli
Suomi	2013-2020	1	2013	20 %		2020
Tanska	2012-2020	2	1995	n. 15 %		2020
Viro	2014-2020	1	2007	n. 20 %		2020

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National features and characteristics

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Austria

- Leader in Europe
- 5th national program
- Reached 20% of the field area in 2015 (target year 2010)
- 15 % of farms
- Medium size 23 ha (conventional 19 ha)
- Highest national subsidice-level (285 e/ha) and special subsidices for vegetable production (450-600 e/ha)
- Share of organics of food markets 6%
- Research is supporting the production increase

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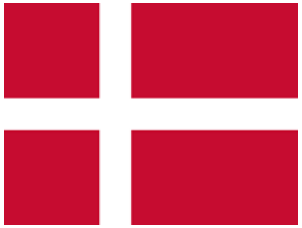
Danmark



- Consumption 162 e/person/2014
- Share on food markets 7,6%
- Share of organic milk products 24%
- 6,3% of the field area
- 5,7% of all farms
- Medium size 79 ha (conventional 67 ha)
- National subsidices at low level
- 1987 national laws for organic food production
- Research and ICROFS (2008) have a central role in national development work
- Public catering has an important role: target 60% of all food in 2020

Estonia

- 15,7% of the field area
- 8% of farms
- Medium size 100 ha (conventional 50 ha)
- 1,6% of the food market
- Consumption 17 e/person/y
- National subsidices for vegetables, fruits and berries (350 e/ha)
- Careful national program 2014-2020

France

- 1/10 of all organic field area in Europe
- 4,9% of field area in France
- 4,8% of farms
- Medium size 44 ha (conventional 59 ha)
- 2,5% of food markets
- Strong positive development since 2008 (1. national program)
- Special subsidices: vegetables, fruits, olivs ja grapes
- Research and development activities co-operate

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Finland

- 10% of the field area
- 7,4% of all farms
- Medium size 49 ha (conventional 42 ha)
- 2% of the food markets, 73 e/person/y)
- Special national subsidices for vegetables
- National program in 2013
- Conventional lähiruoka ”almost organic”
- Both consumption and production are increasing

Germany

- Almost 1/10 organic field area in Europe
- 6,3% of the field area in Germany
- 8,2% of farms
- Medium size 56 ha (conventional 59 ha)
- 4,4% of the food market
- National subsidices for grapes and others
- All agricultural universities have reseach and educational programs in organics
- Network of demofarms (200 farms) paid by the ministry
- Ökolandbau-program ja netpages to deliver information

Norway

- 4,8% of the field area
- 5,2% of farms
- Medium size 21 ha (coinventional 23 ha)
- 1,5% of food markets
- National program 2009-2020 target 15% of the field area and consumption
- National food production has a label ”almost organic”

Sweden

- Strong positive development since 2006
- 17,1 % of the field area
- 7,8 % of farms
- Medium size 88 ha (conventional 45 ha)
- 6% of the food markets
- Consumption 145 e/person/v 2014, is increasing
- Special subsidices for fruit and berry production, 830 e/ha
- Environmental programs in municipalities
- Research funding for organic agriculture

Conclusions

Conclusions 1

- It is possible to reach 20% of the field area (Austria, Estonia, Sweden)
- Size of the farm is not decisive (Austria)
- It is possible to increase consumption of organic food by open information delivery and marketing (Austria, Danmark, Sweden, Germany)
- The role of public sector in increasing consumption is decisive (Danmark and Sweden)
- Production and consumption can be increased by national organic policy and subsidices (Austria, France and Germany)

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Conclusions 2

- National programs ought to pay attention in addition to targets to the means (Estonia, Danmark, France)
- Reseach can have an important role to increase organic food production (Austria, Danmark, Germany)
- Price policy in processing food industry has strong effects on consumption (Arla in Sweden)
- Also small and family size processing units are possible (Danmark, France, Germany)
- It is possible to organize the certification on public or private base or by a combination of both

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Conclusions 3

- Best practices to **increase production** are subsidices, national programs including both targets and means and co-operation between farmers and research
- To **increase consumption** best methods are information delivery to consumers - especially when pestiside residues are found - but also marketing activities. Local municipality level programs to improve environments including organic food increase in public catering are effective

Conclusions 4

- To **diversify the production** especially useful have been diversification of policy actions and national level decisions to pay more subsides for plants and products, whose production ought to be increased

- To **increase both production and consumpion** price policy is effective

Thank you very much for your attention!

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