Sustainable Fruit and Vegetables : an history of 40 years

A willingness, a strong commitment leaded by Producers' organisations and Régions

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Editorial- Simona Caselli

A common work

his study has been written with the close cooperation of the members of AREFLH, Regions and ssociations of producers' organizations (APOs). All together they represent more than 40% of e European production of fruit and vegetables.

- **Régions**: Bretagne, Grand Est, Nouvelle Aquitaine, Val de Loire, PACA, Auvergne Rhone Alpes (France); Basilicate, Emilia Romagna, Trento (Italy); Andalucia, Catalunya, Valencia (Spain).
- **APOs** : OBST(Austria); VBT (Belgium); Viva group, APOT, FINAF (Italy); Rougeline, Cooplatour, Pomevasion (France); UNICA group, Fruit du Ponent, Coopfrudeca (Spain); CZ fruit, EB fruit (Czech Republic).

They play a key role in the dynamics of progress and development of the whole European sector at the economic, social, environmental levels in the framework the Common Market Organisation (CMO)

Since 1970, Producer's organizations in partnership with their regions have been strongly involved in strategies of implementation of durable schemes of production, to preserve in a long run soils, air and biodiversity and consequently, their own production means.

With the help of fundamental and applied Research, major advances have been done through various framework programmes (from integrated farm management to organics) in order to respond to the societal expectations and the market requirements.

All are converging to the same objective: to produce safe, secure and durable fruit and vegetables in the context of an increasing world competition and more and more open markets and competitors who don't have the same social and environmental constraints.

Thanks also to IFOAM, FIBL EUROSTAT and FAO for the data on organic productions, trade and market

Contents

Fruit and vegetables accounted a fundamental sector for many EU Member States, especially those where it is particularly well developed, such as in the Mediterranean regions and in some northern and eastern European countries. Moreover, all EU Member States produce at least at 14% of the value of the European production

One characteristic of the EU trade in fruit and vegetables is the predominance of internal flows over extra-EU trade, due to product perishability, but also to the variety of the EU's produce.

Another feature is that the EU is traditionally a net importer in international trade. In 2019, while the value of the EU's exports to non-EU countries of (fresh, chilled and dried) fruit and vegetables totalled €7 billion (15 % of all primary food commodities export value and 5 % of agri-food export value), imports from non-EU countries totalled €26.8 billion (one third of all primary food commodities import value and 23 % of agri-food import value

Moreover, the **fruit and vegetables are a showpiece of a healthy, balanced and durable diet**. They are strongly recommended by the medical community because they help to fight against certain cardiovascular diseases and certain cancers. They also effectively prevent the overweight and obesity, which affects a growing number of people in Europe and in particular the young people (obesity crossed the threshold of 20% in many countries).

In spite of these benefits the daily consumption in Europe is only of 363 g per head in 2020 (Freshfel). Freshfel Europe's 2020 Consumption Monitor examines the latest sector data from 2018. While aggregate consumption remained below the WHO recommended minimum daily consumption of 400g, fresh produce consumption in the EU showed a strong positive increase of 4% compared to 2017 levels. Representing a 5.1% increase compared to the previous five years (2013-2017), this significant improvement can be attributed to a 9.5% rise in fresh fruit consumption to 211.82g per capita per day, which also compensated for a slight overall decrease in vegetable consumption to 151.94g per capita per day.

This highlights the determining **role of the fruit and vegetable sector for the whole society and rural employment.** The fruit and vegetables are products with high added value and with a very broad range of species and varieties. They take an active part in the economic activity and the employment of many regions. They allow also the maintenance of ecosystems and a sustainable land use.

With regards to environmental measures, the CMO, as of its origin, was precursory of **a much more overall agricultural policy,** which was going to be essential several years later; it is the first agricultural policy being conditioned by environment-friendly actions, and this since 1997.

Environmental measures contribute to the implementation of actions and services required by the civil society. More precisely these interventions exert their effects on the environment in terms of:

- Reduction of the impact by the fall of inputs use and/or by the implementation of alternative methods for plant protection, agricultural fertilisers, water, etc.
- Improvement of the quality of the soil and reduction of erosion.
- Improvement of biodiversity and landscapes.
- Reduction of the environmental impact of waste.
- Savings of water and energy.
- Restoration of the quality of the soil.

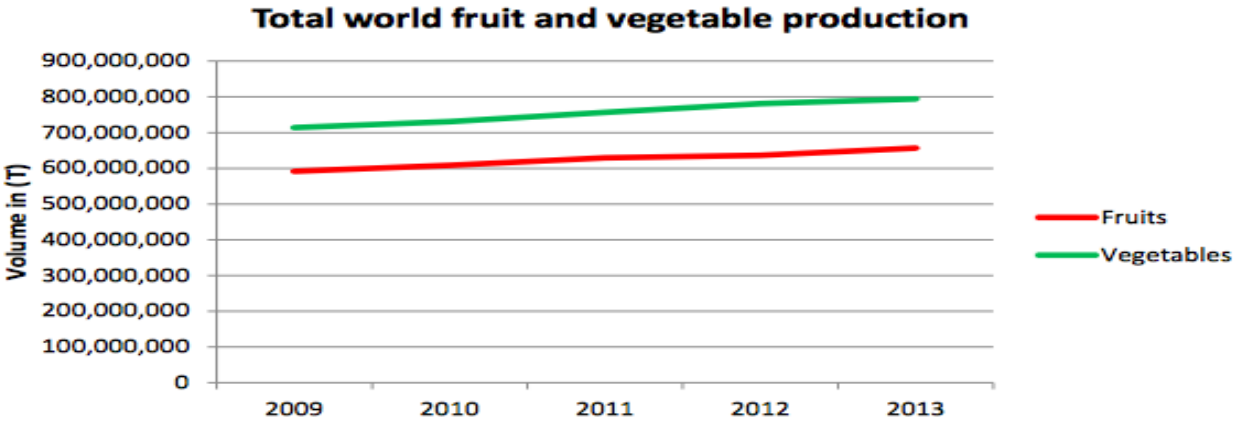
Fruit and vegetables in the world at a glance

What are the production trends for fruits?

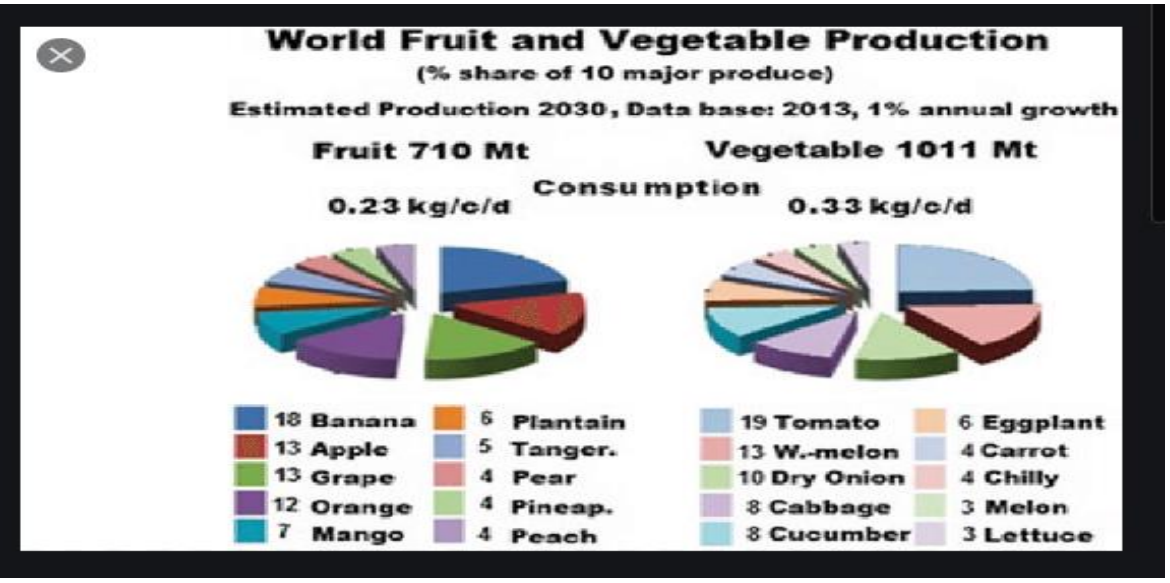
The most produced fruit in the world, measured by quantity, are watermelons with 97.763.039 T being produced in the year 2013, followed by bananas (95.159.567 T), apples (64.387.061 T), mangoes (58.245.875 T) and oranges (49.877.145 T). In 2013 production of nearly all products was above the figures for 2012, the overall production worldwide increased with 3.2 % compared to 2012 and rose 6% compared to the average of the last four years.

What are the production trends for vegetables?

The most produced vegetables in the world, measured by quantity, are tomatoes with 130.380.139 T being produced in the year 2013, followed by cabbages (63.940.358 T), cucumbers (63.886.639 T), aubergines (44.357.558 T) and carrots (33.423.962 T). In 2013 production of all the Top 10 products was above the figures for 2012. Overall, the production of all vegetables also increases steadily, similarly to fruits. On a longer perspective, the 2013 production of all of the products (with a few exceptions of relatively stable products), all vegetable categories increased in quantity produced. Overall, vegetable production increased by 6, 1 % compared to the average of the last four years.

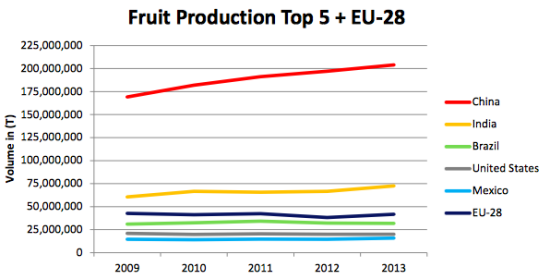


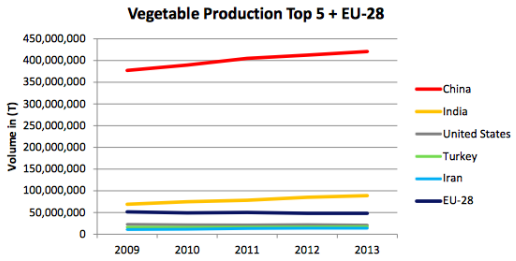
Source Freshfel Europe



Fruit and vegetables In EUROPE

Fruit and vegetables accounted for approximately 14 % of the total value of the EU's agricultural production in 2018. This is a fundamental sector for many EU Member States,





Apples and tomatoes are the main products of the richly diversified produce of the EU's fruit and vegetable farms. Mostly small-sized with relatively high labour input, these farms earn incomes ranging from average (for fruit specialists) to very high (for horticulture specialists, including also flower and ornamental plant production). EU trade in fruit and vegetables is characterised by the predominance of internal over external flows, where the EU is traditionally a net importer.

To strengthen the resilience of both the fruit and vegetable sector and its operators, and to boost the consumption of their produce, the EU has in place a comprehensive support system, especially through the regulatory framework for the common organisation of the markets in agricultural products. Rules on producer organisations and their operational programmes, crisis management and marketing standards, help the functioning of the sector, with additional support from the EU school fruit and vegetables scheme, as well as from the EU promotion and quality policies, income support and rural development measures, valid for all agricultural sectors.

Fruit and vegetables are key European Union (EU) agricultural products, with an annual output value of over €57 billion in 2018, of which about 60 % is accounted for by vegetables and nearly 40 % by fruit. The sector's output represents one quarter of the value of the EU's total crop output and 14 % of the overall agricultural output value, with a 30 % increase in ten years. In 2017, vegetable harvested production was almost twice as big as that for fruit, although fruit groves outnumbered fresh vegetable acres by about one million hectares (ha). Even though fruit and vegetable growers are geographically concentrated, products such as cabbages, tomatoes, carrots and apples are cultivated all over the EU

Table 1 – EU main fruit and vegetables (thousand tonnes) and country shares over 10 % (average 2015-17)

	Cabbages	Tomatoes	Watermelons	Peppers	Carrots	Onions	Apples	Pears	Peaches	Oranges
EU-28	3.7	17.7	3.1	2.6	5.5	6.5	11.8	2.4	2.8	6.2
Belgium								14 %		
Germany	16 %				12 %					
Greece			20 %						24 %	15 %
Spain		29 %	35 %	46 %		20 %		15 %	35 %	54 %
France					10 %		16 %			
Italy		34 %	17 %				19 %	31 %	32 %	26 %
The Netherlands				14 %	11 %	24 %		14 %		
Poland	26 %				14 %	10 %	26 %			
Romania	17 %		15 %							
United Kingdom					14 %					

Data source: Eurostat, Crop production in EU standard humidity, 2017.

Apples have been the main fruit produce in the EU, both in terms of output value (about one fifth of overall fruit production) and volume of harvested production (29 % of total fruit production) over the past few years, followed by oranges, peaches and pears (between 8 and 9 % of output value each, and 18 %, 9 % and 7 % of volume of production respectively). Nuts cover about one third of all fruit groves, followed by apples (16 %) and oranges (9 %), with 'Golden Delicious' apples and 'navel oranges' being respectively the main varieties.

Regarding vegetables, tomatoes generated about 20 % of the overall vegetable output value over the last ten years. With more than one quarter of the overall volume of vegetable

production and 11 % of the vegetable area, tomatoes were by far the main EU vegetable production in 2017, followed by onions and carrots (with about 10 % of the total volume of vegetable production each), and cabbages, watermelons and lettuces (about 5 % each).

Slightly less than 200 000 horticulture specialist farms and about 540 000 fruit and citrus specialist farms represented 7 % of the 10.5 million agricultural holdings operating in the EU in 2016. This relatively low share at EU level covers different situations in the Member States, where their shares vary from negligible (such as in Ireland, Denmark, Luxembourg and the United Kingdom) to very substantial (such as in Malta and the Netherlands for horticulture, with respectively, 17 % and 13 % of all farms, or in Cyprus, Spain and Portugal for fruit, with respectively 25 %, 16 % and 11 %).

The large majority of these specialist farmers cultivate only a few hectares (ha) of agricultural area each. If a threshold is set at 5 ha of cultivated area, more than three quarters of these farms fall below this threshold, with an overall cultivated area that only reaches 23 % and 19 % of the total areas cropped with respectively fruit or horticultural products

Horticulture and fruit production represented altogether 9 % of all agricultural full-time equivalent jobs in 2016, albeit only 7 % of all farms and 2 % of all agricultural area, mainly due to the more labour intensive horticultural sector. Non-family and seasonal workers are more numerous in farms specialised in fruit and citrus or horticulture than in other farming specialisations, representing over one third of all EU non-family labour force working on farm on a non-regular basis 2013 (with higher percentages for the Netherlands, Spain and Poland, among others).

EU trade for fruit and vegetables

One characteristic of the EU trade in fruit and vegetables is the predominance of internal flows over extra-EU trade, due to product perishability, but also to the variety of the EU's produce. In 2017, except for nuts, bananas and other tropical fruit, intra-EU trade registered a much bigger value than trade in fruit and vegetables with non-EU countries. Among the most traded (in terms of value) products, Spain was leader for citrus fruit, Italy for apples and the Netherlands for tomatoes and strawberries and other berries, with Germany being the main importing country for these products.

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The EU had nearly 4,600 organic importers in 2017 and more than 4,800 in 2018 according to our estimates. Germany represented 35% of organic importers from the EU in 2018, far ahead of France and Italy (

The top three countries of origin of these imports were the US, Costa Rica and Colombia for tropical fruit, nuts and spices, and South Africa, Chile and Turkey for other types of fresh and dried fruit, while over 70 % of imported oranges came from South Africa or Egypt.

The European Union had more than 2,600 organic exporters in 2018. This figure is underestimated because the number of organic exporters from France is not known. Germany represented 46% of organic exporters identified in the EU in 2018 and Italy 18%.

Intra-EU trade (full year 2020)

EUR Bil	2019	2020	Change	First Ms exporter	First product
VEGETABLES - Fresh	19,4	19,0	-2%	ES (+1%)	Fresh tomatoes (EUR3bl)
FRUITS - Fresh	12,2	13,2	8%	ES (+6%)	Fresh grapes (EUR1.9bl)
PREPARATIONS F&V	13,0	12,9	0%	NL (-4%)	Frozen potatoes (EUR2bl)
TROPICAL & NUTS	8,5	8,6	1%	NL (+6%)	Bananas (EUR2bl)
CITRUS	4,2	5,0	18%	ES (+15%)	Oranges (EUR1.9bl)
JUICES	4,4	4,2	-3%	NL (-7%)	Orange juices (EUR0.8bl)
Total	61,7	62,9	2%	NL (+2%)	

- **Trade within EU worth EUR63bl (+2% YoY)** with NL and ES accounting for half of intra-EU exports and GER and FR accounting for half of intra-EU imports
- Fruits sector very dynamic pushed by 20%/30% YoY increases in the main products (oranges, apples, lemons).
- Vegetables down due to fall in potatoes trade (-25% YoY). Tomatoes stable (+ 1% YoY), bell peppers more dynamic (+5% YoY)

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Main Trends for Eco-friendly fruit and vegetables in Europe

One goal, several converging routes

European fruit and vegetable producers, fully aware of the major societal and environmental challenges to be taken up, have, for more than 30 years, taken steps to progress towards ever more reliable quality and cultivation routes that respect the environment. There are many approaches, but all of them have enabled significant progress, resulting in consumers being offered some of the safest food in the world.

A wide range of environmental, societal and economical services

Integrated Production

In Europe there are numerous terminologies which are used to describe patterns of environmentally friendly production. From "**Integrated Protection**" against crop pests which was released by the IOBC in the 1960s, we have gradually taken into account all the agricultural practices that are potentially harmful to the environment. From this comes the concept of **Integrated Production** (IP).

Integrated Production is a farming system that produces high quality food and other products by using natural resources and regulating mechanisms to replace polluting inputs and to secure sustainable farming. (IOBC WPRS-1993).

Emphasis is placed

- On a holistic systems approach involving the entire farm as the basic unit,
- on the central role of agro-ecosystems,
- On balanced nutrient cycles, and
- On the welfare of all species in animal husbandry.

The preservation and improvement of soil fertility, of a diversified environment and the observation of ethical and social criteria are essential components.
Biological, technical and chemical methods are balanced carefully taking into account the environment protection, the profitability and the social requirements.

Many reference documents on “Integrated Fruit Production” (IFP) have been developed in France and in Europe mainly by IOBC guidelines.

In the absence of a national regulatory definition, "private" definitions have emerged at different levels which have been made especially for inter-branch organizations led by producers. For example, LEAF8 in the UK, regional authorities, such as in Italy and Spain, as well as a growing number more by distributors. They take the form of simple reference documents or norms.

The integrated production represents a system of specific rules to each culture, applied at various stages of the production of fruit and vegetable food. It is characterized by a weak environmental impact.

All the information related to the growing methods are recorded on registers, and can, consequently, always be checked for conformity.

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However, the significant reduction of authorized active substances is a serious subject of concern, especially for the “minor cultures” and the Mediterranean cultures. Above all, if they are not replaced by new ones with an equal effectiveness and toxicological profiles that are compatible with the new rules

But this drastic revision has not been a sufficient guarantee for the trade, which has increasingly strict requests. Purchasing groups impose to the suppliers’ schemes of supply characterized by a specific environmental value (GlobalGap, BRC, YEWS, Nature Choice, etc). Some of these requests appear excessive. To require a level of residues in the products not exceeding a third of the level of

the LMR does not take account of the limit fixed by the law calculated to ensure the safety of the consumers. To limit the presence of active substances (3 to 5) cancels the principle of the production integrated which is to alternate the products used to avoid the accumulation of residues and the pest resistance.

Moreover the integrated production defines the operational rules for the principal production stages process like the fertilization and the irrigation. For the fertilization, a rational management of the contributions of the three macronutrients allowing a good nutritional balance is applied in order to obtain a reduction of the chemical inputs of energy consumption and costs.

The fruit and vegetables production is particularly demanding in water. It is facing the risk of water scarcity, especially with the growing need of the urban populations and other economic activities. The rule of water management in integrated production is based on the concept of water use in sufficient quantity and at the right moment by using highly effectiveness irrigation systems.

Also, it must be said that functioning in line with sustainable production systems **generates employment and professional trainings** which gives a social dimension. In fact the attention of the consumers at the time of the decision of purchase, is drawn to concepts of social responsibility and product environmental impact.

In this context it is also necessary to evoke the current Community measures, such as the “greening” of the future CAP and the directive on “the sustainable use of phytosanitary products” which urges the producers to find right the balance between nature and technology, the best relation between the social and ecological needs.

3 countries: Spain, Italy, France

SPAIN

Regulatory regulations for integrated production (General rule, Royal Decree 1201/2002)

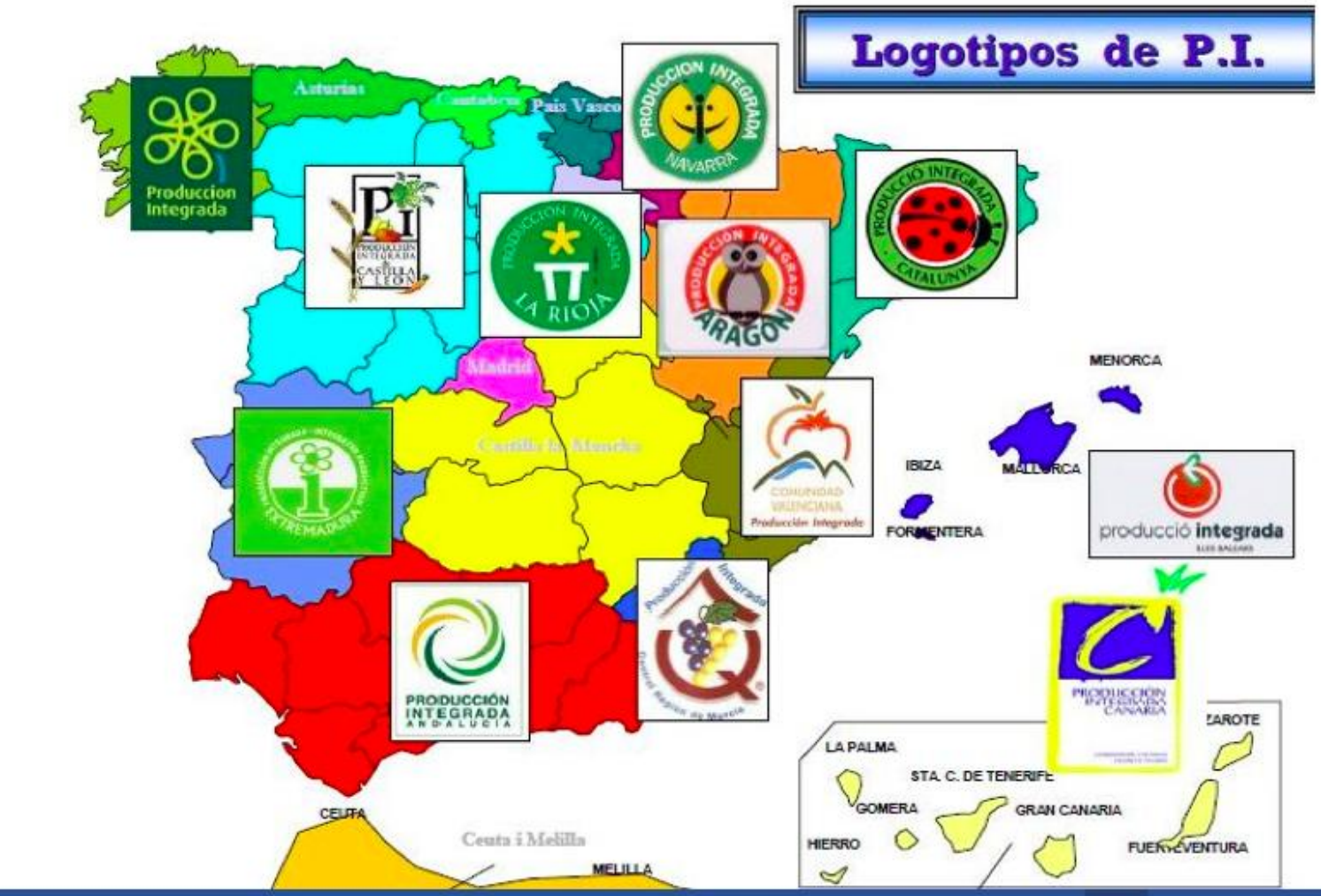
At the national level, the first regulation of ‘’ Integrated production of agricultural products” was established by Royal Decree 1201/2002, of November 20,

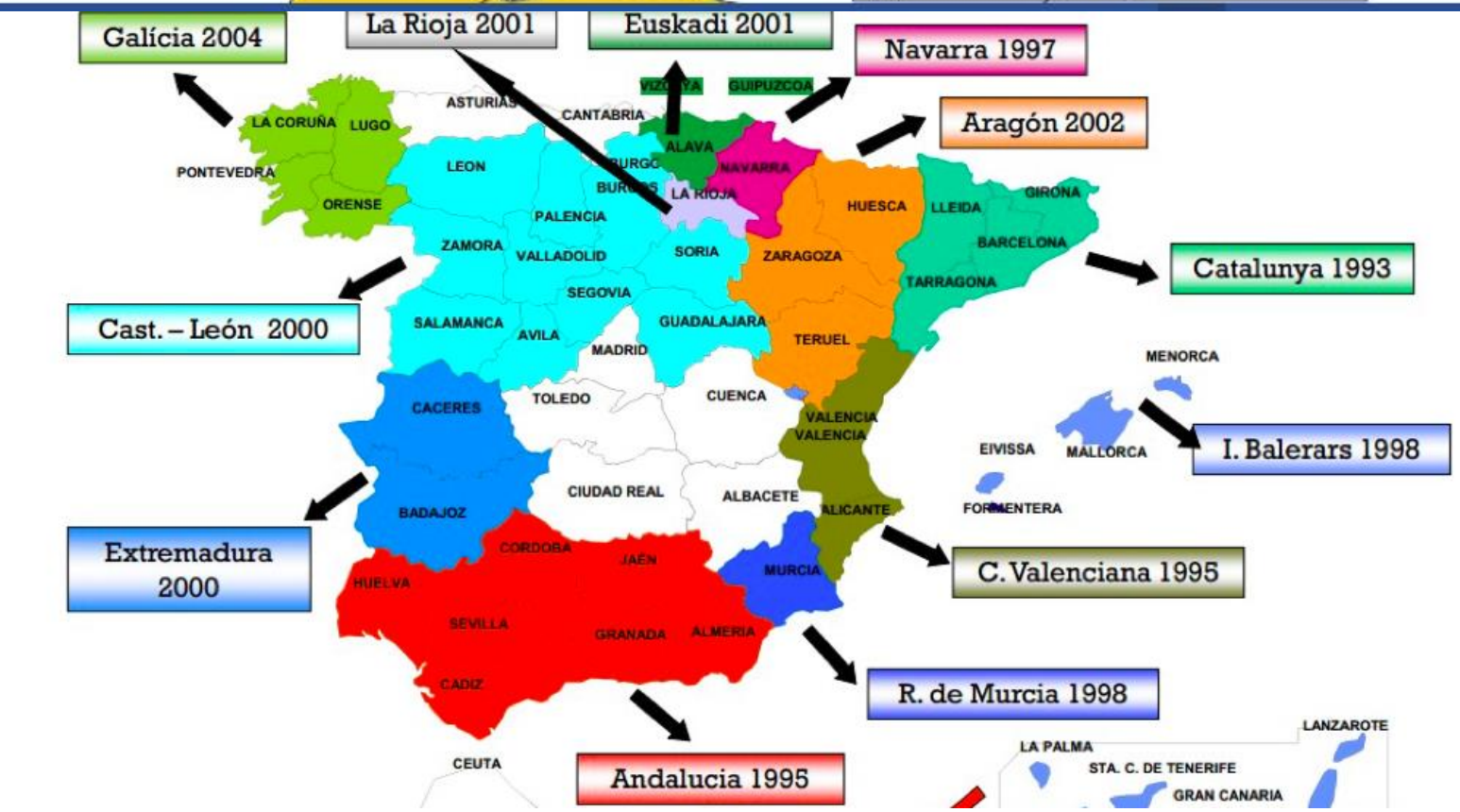
Until 2002, the regulations governing integrated production were developed exclusively by the autonomous communities, thus establishing a distinctive guarantee of integrated production and its own certification control system that was different from the others, producing a heterogeneity between the different integrated production regulations.

As of 2002 the regulations of the autonomous communities must be added that developed by the Ministry of Agriculture, Fisheries and Food. In this new stage, each Autonomous Community maintains its own regulatory regulations, within the scope of:

♣ The establishment of production standards and general requirements that operators using integrated production systems must meet. They designate, within each phase of the production cycle, the practices considered mandatory and those that are expressly prohibited.
♣ The regulation of the use of the guarantee identification that differentiates these products before the consumer.
♣ Recognition of Integrated Production Groups (API) in agriculture, for the promotion of said production.
exclusively autonomous, which has progressively adapted to the basic requirements established by national regulations, preserving its distinctive guarantee of integrated, proprietary and differentiated production, to which the integrated production logo has been added. The control and certification system for integrated production, in this period, has only been developed by the autonomous communities.
The regulations of all the autonomous communities are very similar to each other in terms of the definition of integrated production, basic regulations, product promotion and the appointment of a commission to coordinate them. However, they differ in aspects related to the entity or physical person who can carry out integrated production, the technical control of the farm, the raw materials allowed to control pests, diseases or weeds and the maximum limits of residues that remain in production.

Since 2004, specific technical standards for integrated production have been published at a national level, which coexist with those established by the autonomous communities.
■ The creation of the National Commission for Integrated Production in charge of advising and coordinating on integrated production.
Table 2 sets out the general mandatory regulations that are included in Annex I of Royal Decree 1201/2002, and that define the agricultural practices that, under the direction of the person in charge or competent technical service, must comply with. the operators without prejudice to the observance of other laws, especially those relating to plant production material, fertilizers, toner, waste management and packaging, prevention of occupational hazards, health and the environment.


Logotipos de P.I.
Producción Integrada
Asturias
Cantabria
País Vasco
PRODUCCION INTEGRADA NAVARRA
PRODUCCIÓN INTEGRADA CASTILLA Y LEÓN
PRODUCCIÓN INTEGRADA LA RIOJA
PRODUCCIÓN INTEGRADA ARAGÓN
PRODUCCIÓ INTEGRADA CATALUNYA
Madrid
Castilla-La Mancha
EXTREMADURA
COMUNIDAD VALENCIANA Producción Integrada
MENORCA
IBIZA
MALLORCA
FORMENTERA
producció integrada
PRODUCCIÓN INTEGRADA ANDALUCIA
Producción Integrada Región de Murcia
PRODUCCIÓN INTEGRADA CANARIA
LA PALMA
STA. C. DE TENERIFE
GOMERA
GRAN CANARIA
HIERRO
FUERTEVENTURA
CEUTA
Ceuta i Melilla
MELILLA


Galícia 2004
La Rioja 2001
Euskadi 2001
Navarra 1997
Aragón 2002
Catalunya 1993
I. Balerars 1998
C. Valenciana 1995
R. de Murcia 1998
Andalucia 1995
Extremadura 2000
Cast. – León 2000
ASTURIAS
CANTABRIA
VIZCAYA
GUIPUZCOA
ALAVA
NAVARRA
LA RIOJA
LA CORUÑA
LUGO
PONTEVEDRA
ORENSE
LEON
BURGOS
PALENCIA
ZAMORA
VALLADOLID
SORIA
SEGOVIA
SALAMANCA
AVILA
MADRID
GUADALAJARA
ZARAGOZA
HUESCA
TERUEL
LLEIDA
GIRONA
BARCELONA
TARRAGONA
MENORCA
EIVISSA
MALLORCA
FORMENTERA
CACERES
TOLEDO
CUENCA
VALENCIA
ALICANTE
CIUDAD REAL
ALBACETE
BADAJOZ
CORDOBA
JAÉN
MURCIA
HUELVA
SEVILLA
GRANADA
ALMERIA
CADIZ
CEUTA
LANZAROTE
LA PALMA
STA. C. DE TENERIFE
GRAN CANARIA

Actors and Partners Involved

All members of the production chain, from farmers and ranchers to handling, packaging, processing and labeling of product operators are involved in the process in Andalusia.

Objectives and Strategy

Faced with growing concerns about food quality and environmental protection, the aim is to develop sustainable production systems which converge in productivity, safety, quality and environment friendly technologies.
To achieve these objectives, the Junta de Andalucía has invested heavily in the development program of Integrated Production. Currently, it leads and concentrates the largest number of hectares devoted to this production model.

PRODUCCIÓN INTEGRADA ANDALUCÍA

General Rules

In Andalusia, integrated production is governed by the Decree 245/2003 2nd September, which defines the rules on integrated production for agricultural products and their processed forms, modified by the Decree 7/2008 15th January. They are defined in the Andalusian context:

- Production standards and general conditions to be met by operators who adhere to the approach
- Use of guarantee branding that differentiates these agricultural products to the consumer and their control as well as the authorization of certifying bodies.

Specific integrated production rules and genuine instruments of technology transfer which collect the latest technical and scientific knowledge are published with standards that establish mandatory, prohibited and recommended practices for each production, process or preparation operation defined for each agricultural product.
20 published technical standards including the following fruit and vegetables: strawberry, stone fruits, tomatoes for the processing industry, and 8 vegetables
Control and certification system: by accredited entities according to the EN 45011

Reglamentos Específicos de Producción Integrada por cultivos

IP is 60% of the cultivated area in Andalusia with 45,000 farmers involved in the process. For more details: http://www.juntadeandalucia.es/agriculturaypesca/portal/areas-tematicas/agricultura/sanidad-vegetal/produccion-integrada/material-divulgativo.html

Superficie en Producción Integrada por cultivo y provincia (ha)

CULTIVO	ALMERÍA	CÁDIZ	CÓRDOBA	GRANADA	HUELVA	JAÉN	MÁLAGA	SEVILLA	TOTAL
Ajo							493		493
Alfalfa								871	871
Algodón		7.828	2.330		169	2.623		32.266	45.216
Almendro	1.188		1.756	933		574	493		4.944
Arándanos					2.393				2.393
Arroz		1.607						33.362	34.969
Caquis					248				248
Cereales			4.135		987			500	5.622
Cítricos	99	161	5		2.708			1.737	4.710
Frambuesa-Mora					1.417				1.417
Fresa					5.248				5.248
Frutales de hueso					548			720	1.268
Hortícolas proteg.	9.624			203					9.827
Olivar	2.057	9.313	58.170	68.948		92.302	45.013	117.380	393.183
Remolacha azucarera		1.042						3.570	4.612
Tomate transf. Ind.								2.368	2.368
Vid vinificación		1.579	244				188		2.011
TOTAL PROVINCIA	12.968	21.530	66.640	70.084	13.718	95.499	46.187	192.774	519.400

Fuente: Registro de Producción Integrada de Andalucía. Consejería de Agricultura, Ganadería, Pesca y Desarrollo Sostenible.

Published guide: Integrated Production Guide

This logo is used to identify products from IP.

The slogan **"Compromiso Verde"** set up from 2007 transmits the image of the integrated production as food-processing high quality sign referent for all the production line in passing for all its levels: a farmer, a market, a consumer, industry and a company (society).

This promotion wants to inform the consumers about the qualities of these products and to change this distinguishing feature in sign of confidence, safety, qualities which differentiate them besides productions by the values

CATALUNYA

Actors and Partners Involved

The competent authority for integrated production in Catalonia is the **Ministry of Agriculture, Livestock and Fisheries** through the **General Directorate of Agricultural Production and Rural Innovation (DAR)**, which delegates part of its powers to a coordination unit : the Catalan Council of Integrated Production (CCPI) over which it exercises protective administrative.

The main functions of the DAR are:

- The development and implementation of all legislation on

integrated production.

- The controlling of the CCPI's activities, the control and certification institutions and the resolution of Administrative appeals filed against the Board administrative law.
- Management and coordination of all the integrated production committees.

DAR is based on a **Coordination Unit** and the **CCPI**, an executive body where management, producers, manufacturers and / or importers as well as consumers are represented through their representative organizations.

The main functions of the CCPI are:

- To promote, improve and broadcast integrated production
- The monitoring, control and certification of integrated production.

Objectives and Strategy

To develop the widest integrated production system possible to obtain high-quality agricultural products by using methods and farming practices that respect the environment and to ensure food security and farm profitability.

General Rules

- RESOLUCIÓN ARP/832/2020, de 2 de abril, por la que se convocan las ayudas asociadas al contrato global de explotación para el año 2020 (ref. BDNS 502270). (DOGC núm. 8111 publicado el 14/04/2020)
- Orden APA/377/2020, de 28 de abril, por la que se modifican, para el año 2020, diversos plazos establecidos en los Reales Decretos 1075/2014,1076/2014, 1077/2014 y 1078/2014, todos ellos de 19 de diciembre, dictados para la aplicación en España de la Política Agrícola Común. (BOE núm. 120 publicado el 30/04/2020)
- ORDEN AAM/40/2013, de 4 de marzo, por la que se aprueban las bases reguladoras de las ayudas asociadas al contrato global de explotación y se convocan las correspondientes al año 2013. (DOGC núm. 6342 publicado el 25/03/2013)
- DECRETO 2/2012, de 3 de enero, por el que se regula el contrato global de explotación. (DOGC núm. 6039 publicado el 05/01/2012)
- RESOLUCIÓN ARP/2819/2005, de 29 de septiembre, por la que se establece y se regula el proceso para obtener la homologación y la validación de la formación exigible en producción integrada, para el personal técnico, de acuerdo con lo establecido por la Orden ARP/69/2003, de 14 de febrero. (DOGC núm. 4484 publicado el 06/10/2005)

. The Consell Català de la Producció Integrada continues to bet year after year on a quality production with a certified guarantee. This year, due to COVID-19, the traditional summer promotional campaign had to change its format, but without losing the essence or the objectives.

As every year, the campaign is based on the promotion of summer fruit: peach, nectarine, Paraguayan, cherry ... It is very important to publicize this product because sweet fruit, together with the olive tree, is the main crop of production integrated. Specifically, sweet fruit represents 38%. It should also be noted that almost 80% of the fruit with this label is produced in the Lleida area, with 13,000 hectares, and that 35% of the fruit produced in Catalonia is from integrated production.

Promotional materials


Pencil


Pen


Cloth bag

Journal of CICC, no. 3

Brochure


Minidiptic

Visit the Ministry of Agriculture and integrated production website

ITALY

INTEGRATED PRODUCTION (SQNPI)

On November 18, 2020, the Technical Scientific Body, established with Ministerial Decree 4890/2014, approved the "SQNPI Adhesion, Management and Control Rev.10 of 2021" standard and its annex I.
The 2021 National Integrated Production Guidelines are included in the standard, divided into the two sections of defense and agronomic techniques, and those for the preparation of regional control plans.
On 10 May 2021, the Technical Scientific Body, by means of a written procedure, approved the update of the "SQNPI Adhesion, Management and Control Rev.10.1 of 2021" standard and the related annex I Rev.7.1 of 2021.

ITALIA: i Marchi Collettivi Regionali di valorizzazione del settore Ortofrutticolo riconosciuti.

Regione Emilia-Romagna

The "QC" brand logo

The "QC - Controlled Quality" mark was established with the Regional Law of 28 October 1998 n. 28. Registered by the Emilia-Romagna Region in accordance with the law, it aims to enhance and make unequivocally recognizable quality agri-food productions obtained with integrated production techniques and methods. The rules of integrated production are established by specific regulations that the licensees of the brand are

required to respect. The beneficiaries of the trademark according to law 28/99 are agricultural producers, their associations, Consortia and at particular conditions the processing and marketing companies of the agri-food system, which apply to the Emilia-Romagna Region which issues the concession with a specific formal deed after the outcome of a specific investigation.

Autonomous Province of Bolzano

The logo: South Tyrol quality

"Quality South Tyrol" is the trademark of the Province of Bolzano established by the Provincial law of 12 December 2005n. 12 and subsequent amendments and additions. It is used to mark certain agri-food products. These kinds of Foods boast a superior quality and can bear the South Tyrolean Geographical Indication mark. The quality mark provides the consumer with a sign of recognition. It communicates and guarantees production according to high, selective and objective quality criteria, as well as regional origin, also ensuring transparent traceability. It applies to products or product categories provided for by the Community regulations in force which enjoy particular protection at the level of the European Community and meet certain quality requirements. The right to use the quality label can be granted to companies in the agricultural and food

sector, to producers and producers of foodstuffs and to commercial companies. The use of the trademark authorized by the provincial councilor / provincial competent in matters of trade, having heard the control body and after signing the use contract. Aid may be granted to trademark holders in compliance with the provisions of art. 12 of this law for the purpose of enhancing branded productions.

Veneto region

The Verified Quality logo for plant products.

It is the system that the Veneto Region has established with Regional Law no. 12 of 2001 to "protection and enhancement of agricultural, aquaculture and quality food products to qualify agri-food production and offer greater safety to consumers.

The “Verified Quality - QV” brand owned by the Veneto Region identifies the agricultural and food products obtained in compliance with the production regulations as required by the L.R. 12/01.

For vegetable products, the trademark is green and can be granted for use to operators who request it. The method of obtaining each product is described in a specific binding specification and compliance with which is verified by an independent control body. The granting of the brand is to the

advantage of individual products at the request of individual and collective primary production and processing or transformation companies.
The Regional Council of the Veneto Region promotes the establishment of a consortium for the protection, promotion and enhancement of the products to which the licensees of the brand join voluntarily. To promote the dissemination of the brand, the Board promotes study, research, information and dissemination activities together with promotional campaigns for products protected by the brand.
Friuli Venezia Giulia Region

The AQUA Mark is a collective and voluntary Quality Mark owned by the Friuli Venezia Giulia Region, established on the basis of Regional Law No. 21/2002 and managed by ERSA, the Regional Agency for Rural Development.
It is based on the Regulations governing the use of the Trademark (DG ERSA Decree No. 138/2012 and FVG Regional Council Resolution No. 1745/2012) and on the basis of Technical Production Regulations which the licensing organizations of the Trademark must comply with.
These specifications establish the production techniques, the requirements of the final product and the identification and traceability criteria, guaranteeing environmental sustainability, product quality and healthiness for the final consumer.

The AQUA brand, acronym for Agriculture, Quality and Environment and distinguished by a logo represented by an eagle on a yellow and blue background intends to enhance both fresh and processed agricultural, livestock, fish, forestry-pastoral products. Organizations interested in using the Trademark must submit to the control of a third and independent body accredited on the basis of the UNI EN 45011 standard (General requirements relating to bodies that manage product certification systems) for the certification of agricultural products and once obtained the certification must submit an application to ERSA, which, having verified the requirements, will grant the use of the Trademark.

Tuscany region

The Tuscany Region with the Regional Law 15 April 1999, n. 25 establishes Rules for the enhancement of agricultural and food products obtained with integrated production techniques.

With this law, the Region wants to promote and encourage the production, enhancement and dissemination of agricultural and food products obtained with integrated production techniques in compliance with specific regulations, through the acquisition and granting of its own certification mark

This law applies to the products indicated below as long as they are obtained according to the specifically prepared integrated production

regulations. The products for which it is possible to apply for the trademark are:

- unprocessed vegetable agricultural products, animals and unprocessed animal products;
- processed vegetable and animal agricultural products intended for human consumption essentially composed of one or more ingredients of vegetable or animal origin.
- feed, compound feed for animals and feed materials not included among those listed in the first indent

The beneficiaries of the trademark can be:

- single or associated agricultural enterprises registered in the Chamber of Commerce register trade, industry, crafts and agriculture (CCIAA) or similar bodies of other member states of the European Union that undertake to respect the Disciplinaries of Integrated Production (PPE).
- individual and associated transformation or processing and marketing companies, registered in the register of the Chamber of Commerce (CCIA) or with similar bodies in other member states of the European Union and which have signed, in relation to the products for which the trademark certification required, cultivation or breeding and sale agreements with individual or associated farms that undertake to comply with the IPR In the case of cooperative or associative enterprises that provide for the conferment of productions by the members in the statute, the qualification of member replaces the need for specific breeding and sales cultivation agreements.

Companies licensed to use the trademark are registered in a special list held by the competent structure of the Regional Council.
Pursuant to art. 10, letter c) of the Regional Regulation 2/09/2004 n.47, the regional list of concessionaires of the collective brand "Agriqualità - Product from integrated agriculture" is established in the Tuscany Region, which includes all the companies that obtain the granting of the “Agriqualità - product from integrated agriculture” brand. Pursuant to the provisions of art. 2, paragraph 1, letter b) of Reg. R. n. 47/04, the term "concessionaire" means "any natural or legal person meeting the requirements of art. 3 of the L.R. 25/99 that obtains from the Tuscany Region the concession to use the collective trademark "Agriqualità - product from integrated agriculture" following the commitment to comply with the conditions provided for by the Regional Law n.25 / 99, by Reg. R. n.47 / 04 and by the production regulations in force. The regional list of licensees of the brand is divided into two sections: section 1 - farms, in which agricultural businesses, individual or associated, are registered, as per art. 2135 of the Civil Code; section 2 - processing companies, including companies, individual or associated, in which the main activity is that of processing or preparing agri-food products

Regione Marche

Marchio QM – qualità Marche

To enhance and protect the numerous agri-food excellences of the territory, the Marche Region has been making use of all the tools made available by EU and national legislation for years. The forms of qualification on which the main focus has been placed are the regional brand "QM - Quality guaranteed by the Marche", the Protected Designation of Origin (PDO) and the Protected Geographical Indication (PGI).

The QM brand was established pursuant to regional law 23/2003 and, after obtaining approval from the European Commission in 2005, it became fully operational in 2006 with the publication of the first production regulations. With the placing on the market of HIGH QUALITY milk, the marketing phase begins in 2008, which progressively extends to an increasing number of products. In addition to compliance with production regulations, verified by independent bodies, QM brand products are characterized by the high level of communication that is established between producer and consumer. This creates a relationship of trust based on information that must always be transparent and complete and this is possible by combining the information on the label with that available on the internet.

The Region awards grants to support projects aimed at the application of corporate self-control systems, through the extension of the HACCP manuals and their application to the production regulations of quality

marks for which the Region has granted the concession to use the mark referred to in Article 8.

Individual or associated agricultural and agri-food businesses and those processing agricultural products defined in Article 32 and Annex I of the Treaty establishing the European Community, which operate in the regional territory, may access the contributions referred to in paragraph 1.

sociate e quelle di trasformazione dei prodotti agricoli definiti all'articolo 32 e all'allegato I del Trattato di istituzione della Comunità europea, che operano nel territorio regionale.

Regione Piemonte

";

1) The Piemonte AGRIQicità brand
2) The "Piemonte Agri Quality" project was born on the initiative of the Department of Agriculture of the Piedmont Region, Unioncamere Piemonte and the Piedmontese Provinces. It was approved by the Regional Council with Resolution no. 27/12515 of 09/11/2009166. The

purpose of the project is the realization of a communication plan that combines the territorial identity of Piedmont, its agri-food production and the quality policies practiced in it, with an institutional brand, called "Piemonte Agri Quality" 167. In other words, as explained in the Resolution, “these elements shape what can be defined as a Piedmont System with an all-round quality; a system that goes from the protection of the agricultural and rural landscape, to the defense and development of animal and plant biodiversity, to the welfare of farm animals; from the diffusion of agri-environmental systems, to the protection and enhancement of a large number of products characterized by denominations, brands and certification systems including that relating to PAT, the GMO Free chain, integrated pest management, the production of "high lands" (mountain) and those of the "Park areas", approved with the Regional Council Resolution no. 51/12426 of 10/26/2009; from rural and food and wine tourism, to support for the short supply chain, to food and rural education; all this constitutes, even more, a good example of economic, productive and environmental sustainability ”. The "Piemonte Agri Quality" tool allows the Piedmont Region to communicate "regional policies and therefore if it is deemed necessary to define within it a distinct logo that can be declined in the various Community, national and regional quality systems in place or feasible and which therefore allows the 'identification of companies and products adhering to these quality certification systems”. Quality systems concern:

3) 1) Agri-food productions that can boast the “Agri Qualità DOP” or “Agri Qualità IGP” logos;
4) 2) Wine production with the “Agri Qualità DOCG” or “Agri Qualità DOC” logos;
5) 3) The products obtained from organic farming, with the “Agri Qualità Biologico” logo;
6) 4) The products obtained from integrated production, with the “Agri Qualità Integrata” logo;
7) 7) Traditional Agri-food products, with the “Agri Qualità PAT” logo;
8) 8) OGM Free products with the “Agri Qualità OGM free” logo;
9) 9) Products from Park Areas with the “Agri Qualità Aree Parco” logo;
10) 10) Products in Terre Alte168 with the “Agri Qualità Terre Alte” 169 logo.
11)
12) The Piedmont Region, as part of the "Piemonte Agri Quality" project, has created the site with the following purposes: to deepen all the issues of the Piedmont agricultural, agri-food and food and wine Quality System, in order to inform the consumer about the policies in place by of the Piedmont Region; help the consumer to have a range of information to guide him towards a conscious choice of purchasing the various regional quality agri-food products; accompany the consumer from the moment of choosing the product until the moment of possible identification and acquisition of the chosen certified product and its consumption

Regione Puglia

- Quality System is identified by the Community collective mark "Quality Products" (in acronym PQ) registered at OHIM on 11/15/2012 under no. 010953875 pursuant to Reg. (EC) No 207/2009 with the indication "Quality guaranteed by the Puglia Region". The granting of use of the Trademark is governed by the regulations for its use. The PQ trademark is owned by the Puglia Region and can be granted for use by single or associated companies that request it.
- By joining the brand, the Region intends to:
- - enhance agricultural and food products with a high controlled quality standard;
- - bring to the attention of consumers, through information and advertising actions, the qualitative characteristics of the products that adhere to the Regional Quality Regime "Quality Products" identified by the "Quality Products" trademark; - promote the Regional Quality System.
- The participation of farmers in the Regional Quality Scheme contributes to qualify the quality agricultural and agri-food productions of the territory, broaden their market outlets and make them compatible with the aid provided for in the European rural development programming.

- The RQR mark ensures complete traceability of products, and also allows access to EU aid from European rural development programming.
-
- The following subjects may apply for membership of the RQR and the concession of use of the "Quality Products" trademark, for those products regulated by production regulations approved by a provision of the Region, first becoming adherents and then concessionaires of the trademark:
-
- - single and associated agricultural enterprises; agri-food processing companies, which sign a supply chain agreement with the agricultural companies referred to in the previous point; commercial enterprises, which sign a supply chain / supply agreement with the enterprises referred to in the previous points.
- • The use of the "PQ" trademark is bound by compliance with the Regulations that the Puglia Region has approved by type of product. Production regulations that provide criteria and technical specifications such as to guarantee a quality of the final product significantly higher than the current commercial standards and the general ones established by European or national legislation. Each product specification, approved by product macro category, shows the list of products to which it applies. Agricultural and agri-food products for which adherence to the RQR is required and the use of the "Quality Products" brand must therefore comply with the approved production regulations
-

REGIONE SICILIA

Marchio Qualità Sicura Garantita

The Regional Department of Agricultural and Food Resources, having regard to Art. 22 of the Community Regulation 1974/2006 and having regard to art. 20 of the Regional Law n. 19/2005, adopts the "QS (acronym of safe quality) Sicily" (hereinafter simply called "Trademark") and defines its general contents in this document. The control of branded productions is carried out by a public or mixed control body, included in the MIPAAF list or in the list of the Sicily Region, referred to in the Decree on the "Plan for Advanced Services, Research and Innovation»; the controls on production are carried out on the basis of the approved control plans. The certification of the trademark is open to all companies in the European Union. The use of the Trademark is granted, upon application for membership, to primary production or processing, transformation and marketing companies, individual or collective. Collective and / or processing and / or transformation companies, and / or marketing of the branded product, are responsible for the complete traceability of the product. For each individual product, the request for use of the Trademark entails the adaptation of the entire production of the farm, in relation to that product, to this document and to the Quality Regulations.

The Region of Sicily establishes the “QS Sicilia” brand, to: Enhance agricultural and food products with a high controlled quality standard; implement information actions to consumers on the origin and quality of certified agri-food products; promote and support the marketing and sale of these products. The elements of origin indicated in the quality mark (Sicily) are replaced according to the area of origin; thus, for example, there could be: QS Sardinia, or QS Loira, or QS Bavaria, etc. the mark meets the requirements of the Community guidelines for state aid in the agricultural and forestry sector 2007-2013 (2006 / C 319/01).

The trademark owned by the Region of Sicily can be granted for use to all operators of the European Union included in the categories of producers, conditioners, packers and restaurateurs, individually or in association, registered in the register of companies of the Chamber of Commerce or similar bodies. of other member states of the European Union, who request it from this Region, Regional Department of Agricultural and Food Resources-Department of Structural Interventions for Agriculture in particular: a) agricultural and food products regulated by quality systems recognized by the European Union (PDO, PGI, TSG, BIO) and for wine and spirits; b) agricultural and food products certified on the basis of the standard defined by the technical standards of integrated production; c) agricultural-zootechnical and food products obtained by adhering to specific production standards that aim at achieving a high quality level in the production process; d) catering services for the administration referred to in letters a), b) and c). In any case, the products referred to in letters a), b) and c) must be free from GMOs and their production must be carried out

in accordance with the regulations in force on food safety and hygiene. The products subject to application of the Trademark must be regulated by a "production specification. With regard to integrated production, the integrated production regulations of the Sicily Region must be used, where they exist.

Organic fruit and vegetables in the world

The **French** interpretation of IFP, namely in the professional sector, is below IOBC guidelines and objectives. For instance, fruit quality is acknowledged with basic market standards and the orchard remains apart from its environment. Secondly, it appears that IFP interpretations entail differences in innovations, ranging from improved input management to a new conception of orchards as complex agroecosystems. Likewise, IFP is whether considered as necessary adaptation to market or as an alternative form of organisation that can be

The eco-responsible orchards approach

For more than 20 years, apple growers committed to an eco-responsible production approach have shared the same ethic: producing healthy, tasty and quality fruits with production methods that respect the environment and biodiversity in orchards, while ensuring the economic balance of farms.

Vergers écoresponsables is the label that identifies apples and pears produced as part of this process, since 2011.

Located between organic farming and conventional farming, this progress approach is based on the principles of integrated fruit production, favoring the observation of orchards, organic control methods and advanced techniques to ensure quality production for all consumers. This new generation of apple growers is making a long-term commitment to modern arboriculture, which preserves and nourishes natural balances in order to stay in tune with the world around it.

The Eco-responsible Orchards label, recognized by the French Ministry of Agriculture, is the first in the Fruit & Vegetable sector to have obtained Environmental Certification for Farms (level 2) in 2013.

Eco-responsible orchards, in line with societal expectations

The eco-responsible orchards approach meets new consumer expectations. It marks the commitment of apple growers to production methods that respect the environment and biodiversity in orchards, to offer a quality French apple, healthy and rich in taste! In 2020, the Eco-responsible Orchards logo will be adorned with a tricolored banner to highlight its French origin and promote its productions. Today more than ever, high expectations of French consumers.

Eco-responsible orchards, a french Label wellknown by the consummers

46%

Nearly 1 in 2 consumers know the eco-responsible Orchards label (Source: 2019 Fruits & Vegetables Confidence Barometer - CSA Research)

CONFIDENCE
79%
The label that gives the most confidence to the fruit and vegetable department (Source: Fruits & Vegetables 2019 Confidence Barometer - Interfel / CSA Research)

PREFERENCE
77%

More than ¾ of French people who know the label wish to favor fruits that bear it

(Source: Opinion Way / ANPP awareness survey - March 2020)

RESPECT DE OF the ENVIRONMENT

82% of the consumers believe that the eco-responsible orchards label identifies a culture that respects the environment (Source: Opinion Way / ANPP awareness survey - March 2020)

Eco-responsible orchards, a progress approach that respects the environment and biodiversity

Today, there are 1,300 passionate apple growers, committed to the production of quality fruits, respectful of the environment and at the best price. In February 2013, the Ecoresponsible Orchards Quality Charter obtained Level 2 Environmental Certification from the Ministry of Agriculture. The National Association of Pommes and Pears has set a target of 50% of member farms certified High Environmental Value by 2022.

Pollination & protection of bees

The presence of foraging insects such as bees, butterflies or bumblebees in the orchard is essential for pollination and therefore for the development of apples. This is why many apple growers choose to install beehives in the middle of the apple trees to promote pollination in the orchard. Today, 88% of

the surfaces of eco-responsible orchards are pollinated by calling on beekeepers and their hives. And this collaboration is important since apple growers have been using the same beekeepers for an average of 11 years. Eco-responsible Orchards apple growers sign contracts with beekeepers and agree to respect the apiaries. These contracts formalize a mutual commitment to preserve these essential insects. Note that some apple growers are sometimes beekeepers themselves.

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Maintaining grassy strips between the rows of apple trees

and the establishment of numerous hedges nearby also encourage the presence of bees. Reasoning, observation and agronomic practices Eco-friendly Orchards certified apple growers spend a lot of time observing the life of the orchard, especially the development of diseases or pests. Thanks to these observations, to counts making it possible to measure the level of development of these pests, thanks to decision support tools such as weather stations which make it possible to anticipate the development of fungi such as scab, apple growers n 'intervene only if the harvest is truly threatened. Thus, they tolerate a certain level of presence of these pests without intervening, unlike what was done in the past, and intervene wisely in order to limit interventions. Focus on varietal evolution has been one of the important axes of varietal research in recent years and is aimed at creating varieties resistant to scab, which makes it possible to limit interventions in orchards. This is the case with varieties like Antarès, Ariane, Choupette, Juliet, Opal, etc. Traceability of fruit from the orchard to the consumer

Ensure the traceability and transparency of orchard practices

Eco-responsible Orchards apple growers must keep a cultivation notebook in which all interventions are recorded. It

supports the traceability and transparency of practices. Any systematic intervention is prohibited and each must be technically justified. A mandatory analysis program In order to guarantee healthy fruit to consumers, an annual health surveillance program is carried out by Cofrac accredited laboratories, with multi-residue analyzes carried out per 1,000 tonnes per producer organization or per producer. Batches that do not comply with the regulations in force are prohibited from being marketed; the causes of these overruns are investigated. These programs ensure that the fruit complies with current health regulations.

The Bee Friendly label, created on the initiative of European beekeepers, will soon be able to be used by farmers who agree to comply with strict specifications, the issue of which is the protection of bees. Indeed, agricultural practices are the main cause of the decline of foragers, whose work, along with that of other pollinating insects, is nevertheless responsible for 35% of our food resources.

84% of the plant species cultivated in Europe depend directly on the pollinating role of the bee. However, the latter, weakened for years by the use of pesticides and the loss of biodiversity resulting from intensive agriculture, is threatened with disappearance, throughout the world and

particularly in industrialized countries. However, it is essential not only for maintaining the balance of natural ecosystems but also for ensuring the yields of our agriculture (arboriculture, fodder crops, market gardening, flowers and seed production, etc.) and therefore for our food resources.

The objective of this label, whose specifications are drawn up by the National Union of French Beekeeping (UNAF), in partnership with similar organizations in Germany and Italy, is to raise awareness among producers and businesses, manufacturing and distributing food products for the major issue of bee survival. It will allow fruit and vegetable producers to enhance their efforts to respect the environment, but also breeders engaging in this approach to benefit from an increase in grassland yield and a reduction in the intake of food supplements. .

“Zero Pesticide Residue”

Generic Program Specifications

A Technical & Quality methodological base valid for all plant species that fall under the "Zero Residue of Pesticides" program.

The specifications drawn up by the New Fields Collective fully respond to Interfel's guide to recommendations relating to the use of negative claims on pesticides and their residues in the fresh fruit and vegetable sector. We comply with the regulatory framework around the communication on pesticides and the recommendations on claims related to synthetic or natural active substances approved under Regulation (EC) No 1107/2009.

A clear promise: “Zero Pesticide Residue

A commitment to results

The "Zero Residue of Pesticides" Program guarantees consumers, for products bearing the label, the absence of residues of Active Substances not compatible with this program.

These incompatible Active Substances (AS) are listed in a so-called “gray and black” list and analyzed by an independent laboratory certified by COFRAC (or European equivalent).

The statement of observed deviations are sent to the member and to the New Fields Collective.

This listing includes:

• Active Substances analyzed as part of our internal residue monitoring plans enriched year by year and including:

o Active Substances approved and withdrawn (AMM withdrawal) on our plant species
o Active Substances sought under the Self-Control Plans in force
• completed with:
o the list of Active Substances of the Neonicotinoid family
o “decried” Active Substances (such as glyphosate)
o Active Substances liable to generate residues due to the existence of other crops in the environment close to the crop engaged in “Zero Pesticide Residue” (risk of cross contamination), including any treatments on the plants .

The absence of residue is determined, for each Active Substance analyzed, by a result lower than the Limit of Quantification (LOQ), the smallest value quantifiable by laboratories with an “acceptable” precision (Health document 11945/2015, European Commission) . At present, the performance of measuring instruments leads for the majority of residues to a limit of quantification of 0.01 mg / kg.
And the means to achieve it ...

Technical strategy: a combination of means to control crop pests

The frequency and precise procedures for carrying out analyzes to be carried out on the products are defined and validated by the Species Working Group, on the basis of a risk analysis. The sampling protocol (sample produced in the plot and harvested or finished product) must be formalized according to the risk analysis and therefore the growing conditions. If necessary, and if there is a risk of cross contamination linked to surrounding crops, additional analyzes can be carried out.

The Quality System & the “Zero Pesticide Residue” Standard
The deployment of the quality system to guarantee the Zero Pesticide Residue promise for plant species is based on a risk analysis ranging from farms to the retail stage.

This risk analysis includes, for all stages (production, station / Organization of Producers, commercial structure, retail):

• The dangers and potential risks vis-à-vis the Zero Pesticide Residue Program

• The potential causes of contamination

• A combinations of already existing control measures

• The existing framework documents

• The documents and organizations to modify or create to guarantee the Zero Pesticide Residue promise

This risk analysis is carried out using a document called the “Zero Pesticide Residue” Standard which includes 62 points of quality procedures to be checked and assessed.

These specific procedures and instructions concern in particular the organization, cultivation practices, cleaning methods, hygiene instructions and traceability.

Controls of the correct application of these practices are carried out and recorded throughout the production chain, with the ultimate proof of the results of analyzes carried out on plant species.

External control to secure the process

All the provisions for controlling the Zero Pesticide Residue approach are subject to internal controls but also to control by an independent body...

This external control targets its action on:

• The commercial structure and the stations which will be audited once a year (100%).

• The production companies involved in the program, which will be audited at the level of the square root of the number of producers involved in the process over the year, and this each year.

The basis of the audit is an assessment grid for compliance with the Zero Pesticide Residue standard.

Samples can be taken for analysis by auditors.
An audit summary and t

Organic fruit and vegetables in the world

Organic food products are widely perceived as being of better quality and safer than other food products. EU legislation on organic farming, dating from 2007, has been updated several times and should be finally replaced by a new legislative framework in 2021, with the aim of boosting the sector. With the same objective, in the framework of the rural development policy 2014-2020, EU Member States allocated more than €6.3 billion to supporting farmers or groups of farmers who convert to or maintain organic farming practices and methods.

Organic farming has been constantly growing in the EU over the past years. This trend is evident in the evolution of agricultural

land being converted to organic fruit and vegetable production, although the overall share of total agricultural land farmed with fruit or vegetables remains marginal. However, conversion to organic has been faster in some cases, such as for apples in France, where the organic crop area doubled in five years, or for citrus fruit in Italy, where the organic area reached the highest share of the total citrus fruit area among the world countries surveyed in 2017.

Organic nuts: 4.7% of nut orchards

■ 624,850 ha of nuts were grown organically in 2017 (+ 9% vs. 2016).

In 2017, half of organic tree nuts were located in Europe, 37% in Africa and 11% in Asia.

Spain was the main producer of organic almonds with 123,817 ha in 2017, or 19.5% of Spain's almond orchard. Italy was the leading producer of organic chestnuts with 15,348 ha in 2017, which represented 71.0% of the national chestnut orchard. China was in first place for organic walnut orchards with 39,346 ha in 2016, representing an 8.1% share of its walnut orchard. Turkey was the leading producer of organic pistachios and hazelnuts in 2017 (18,397 ha and 8,859 ha respectively).

In 2017, 19.6% of Turkey's pistachio orchard was organically grown. It exports a lot of organic nuts.

Organic temperate fruits: decline in surfaces in 2017

■ 204,382 ha of temperate fruits (excluding berries) cultivated organically were recorded in the world in 2017 (-19% vs 2016). However, organic temperate fruit areas are underestimated. Figures for India and Uzbekistan, which are among the main countries temperate fruit growers, are not available. 1.6% of the recorded temperate fruit orchards were organically grown in 20171.

The decline in organic temperate fruit areas is mainly due to decreases in China and Poland.

Almost 30% of the world's organic temperate fruit orchard was in conversion in 2017.

In 2017, two-thirds of organic temperate fruit areas were located in Europe and 22% in Asia. Turkey, Italy and China are the main producers of organic temperate fruits.

Latvia is the country with the highest proportion of its organic temperate fruit orchard: 43.3% in 2017. In Turkey, the share was 5.2%, in Italy 11.2% and in China it was 0.4% only.

The apple is the main species of temperate fruit cultivated organically, with 40% of the surfaces in 2017. 1.5% of the world apple orchard was cultivated organically in 2017. In 2017, Turkey was the first apple grower in organic, just ahead of France. 6% of Turkey's apple orchard was organically grown in 2017.

In 2017, the pear became the second species of temperate fruit cultivated organically. 1.3% of the world's pear orchard was cultivated organically in 2017. China is the world's leading producer of organic pears (8,200 ha in 2017), but also organic apricots (9,047 ha in 20162) and peaches organic (5,200 ha in 2017). However, less than 1% of China's pear orchard was organically grown in 2017.

More than 204,000 ha of temperate fruits (berries excluded) grown organically in 2017

Organic citrus fruits: Italy in the lead

■ In 2017, 87,810 ha were devoted to organically grown citrus fruits around the world (-3% vs. 2016). This represented 0.9% of the citrus orchard worldwide1. As there are no data available for two of the main conventional citrus producers, India and Brazil, the areas cultivated organically are underestimated.

The areas of organically grown citrus orchards have declined due to the Yellow Dragon Disease which has caused many losses in Latin America

and the United States. Over 90% of Florida citrus orchards are believed to be contaminated. Costa Rica, Honduras, Belize and the Dominican Republic have abandoned the cultivation of organic oranges because of this disease. Since 2011, the FIBL has been carrying out a study on this disease in Mexico in order to develop solutions: management of soil cover to ensure the presence of useful insects, use of biological control with fungi and insects' parasitoids and induction of resistance in trees, in particular through the use of organic fertilizers.

At least 27% of the organic citrus orchard was in conversion in 2017.

63% of the orchard cultivated organically listed were in Europe in 2017 and 18% in Latin America. Italy is the main producer of organic citrus fruits (39,656 ha in 2017, or 45% of the world orchard). 27% of the Italian citrus orchard was cultivated organically in 2017.

It is followed by Mexico (12,570 ha), Spain (12,088 ha) and the United States (4,919 ha).

The share of organic citrus orchards was also particularly high in Ghana (12.5%) and France (8.7%).

Orange is the main citrus fruit cultivated organically and Italy is the leading producer2.

Organic berries: nearly 2/3 grown in Europe

63,543 ha of organically grown berries were recorded worldwide in 2017 (+ 11% vs 2016). 11.9% of berry areas were grown organically in 20171. In 2017, 64% of organic berry surfaces were located in Europe, 23% in Latin America and 13% in North America .

Blueberries and cranberries are the main organic berries grown in North America. In 2017, Canada was the main producer of organic blueberries, ahead of Chile and the United States. In Canada, 8.3% of blueberry areas were organically grown in 2017, while in the United States, organic blueberries represented 6.3% of areas. In Chile, 25% of blueberry surfaces were cultivated organically in 2018. However, only 10% of its blueberry exports were organic (its main market is the United States). Canada was also the leading producer of organic cranberries. 8.1% of Canadian cranberry areas were grown organically in 2017.

In 2017, sales of organic berries in supermarkets in the United States increased by 22% in value compared to 2016.

17 %).

The total area under organic temperate fruit production recorded here (over 204’000 hectares), is 1.6 percent of the total area of temperate fruit grown in the world (12.6 million hectares in 2016, according to FAOSTAT).[1]

Of the seven most important temperate fruit growing countries in the world (China, Turkey, Iran, India, Russia, the United States, and Uzbekistan), five countries (China, Turkey, Iran, Russia, and the United States) provided data on the area of organic temperate fruits in 2017. It can, therefore, be assumed that the organic temperate fruit area is higher.

The countries with the largest organic temperate fruit areas are Turkey (over 26’000 hectares), Italy (nearly 25’000 hectares), China (22’400 hectares), Pakistan (more than 18’000 hectares), France (16’700 hectares), and the United States (almost 12’000 hectares) (Table 32).

Since 2004, when data on land use and crops were collected for the first time, the temperate fruit area has more than doubled. However, some of the increase can be attributed to the continually improving crop data availability. In 2017, a drop of over 47’000 hectares occurred, this was mainly due to a decrease in China and Poland.

The key temperate fruits are apples, with 40 percent of the temperate fruit area, followed by pears, cherries, plums, and apricots (Table 31). The available data on the conversion status indicates that nearly 30 percent of the total temperate fruit area is In conversion. Thus, a considerable increase in the supply of organic temperate fruit

Since 2004, when data on organic land use and crops was collected for the first time, the vegetable area increased by over six-fold, from 105’000 hectares to the current 676’000 hectares. The major increase in 2017 is mainly due to a substantial increase of the vegetable area in China, Italy, and Spain.

A large part (nearly 120’000 hectares) is for fruit vegetables, followed by leafy and stalked vegetables (salads). For most countries, however, no crop details for the vegetable area are available.

The available data on the breakdown of the fully converted and in conversion area at least 54’000 hectares of a large part of the organic vegetable area is under conversion. Thus, it can be concluded that not a big increase of the organic vegetable supply can be expected in the near future.

Table 25: World: Selected key crop groups and crops area in organic agriculture 2017 (overview including conversion areas)

Crop	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	Total [ha]
Cereals	66'063	1'127'835	2'708'807	153'642	545'707	41'293	**4'464'347**
Citrus fruit	7'151	5'018	55'081	15'641	4'919		**87'810**
Cocoa	149'535	2'232		230'416		1'936	**384'118**
Coffee	373'444	81'674		421'919	87	13'819	**890'943**
Dry pulses	52'992	363'269	442'863	16'175	76'669		**951'967**
Fruit, temperate	78	44'644	134'038	13'052	12'570		**204'382**
Fruit, tropical and subtropical	76'303	70'821	38'146	186'947	3'519	3'963	**379'699**
Grapes	4'651	27'213	340'038	11'973	11'669	7'503	**403'047**
Oilseeds	236'419	341'397	449'439	51'910	118'039		**1'197'203**
Olives	257'089	6'501	592'647	25'944	719		**882'899**
Vegetables	35'811	287'430	172'792	106'042	70'000	3'905	**675'980**

Source: FiBL survey 2019, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 331

Crop group	2016 [ha]	2017 [ha]	Change 2016-2017[ha]	Organic share [%]
Cereals	4'187'874	4'464'347	+276'473	0.6%
Dry pulses	543'630	951'967	+408'337	1.2%
Flowers and ornamental plants	13'967	11'776	-2'191	-
Green fodders from arable land	2'775'400	2'811'795	+36'394	-
Hops	616	605	-12	0.7%
Industrial crops	16'204	11'008	-5'196	-
Medicinal and aromatic plants	182'579	231'767	+49'188	12.9%
Mushrooms and truffles	7'678	14'066	+6'388	-
Oilseeds	1'369'745	1'197'203	-172'542	0.5%
Root crops	90'286	103'807	+13'521	0.2%
Strawberries	9'187	8'383	-803	2.1%
Sugarcane	82'983	77'703	-5'280	0.3%
Textile crops	495'773	503'782	+8'008	1.5%
Tobacco	5'975	5'883	-92	0.2%
Vegetables	441'493	675'980	+234'488	1.1%
World*	**10'816'374**	**12'078'074**	**1'261'701**	**0.8%**

Source: FiBL survey 2019, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 331
Not all countries included in the FiBL survey provided data on land use or crop areas.
**Total includes arable crop groups for which no further details were available, data for fallow land, some minor or not specified crop groups.*

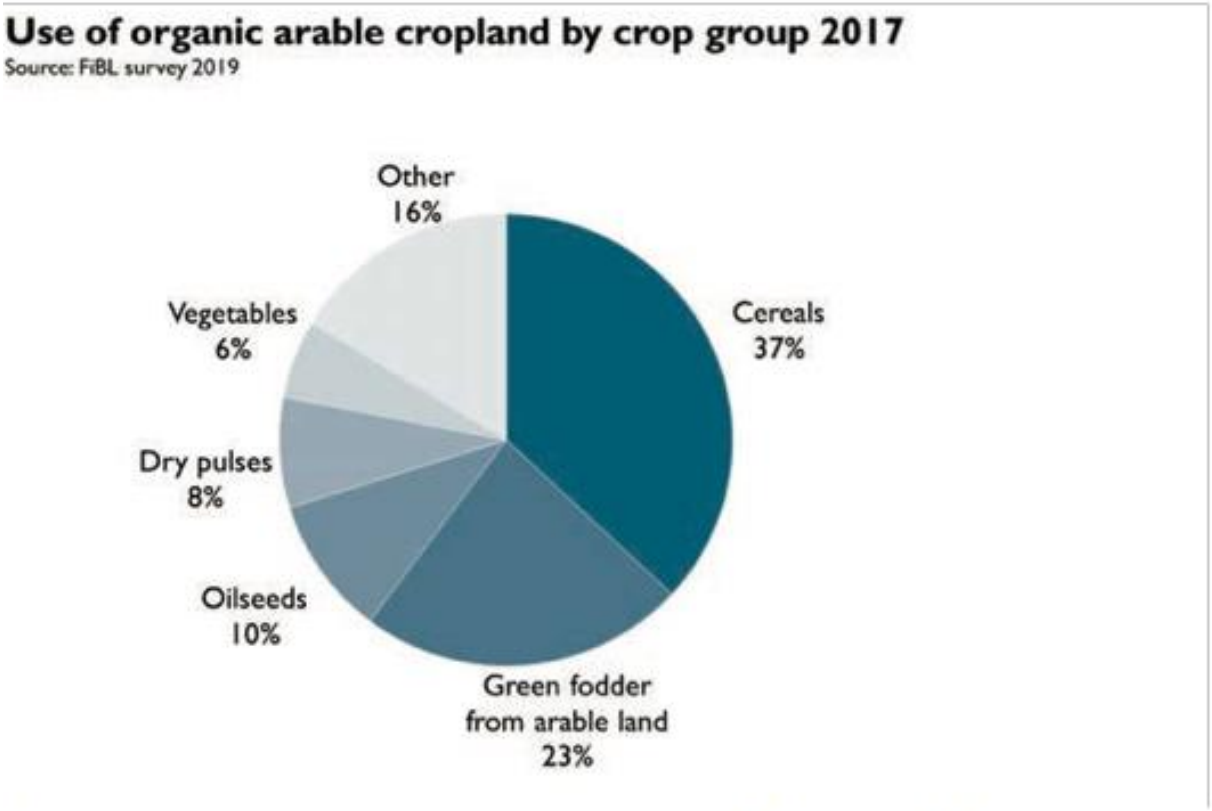
Table 31: Temperate fruit: Organic area by crop 2017

Insérer nº de page

	2017 [ha]	Change 2016-2017 [ha]	Organic share [%]
	81'837	-1'147	1.5%
Apricots	14'792	-8'213	2.6%
Cherries	16'793	+846	2.6%
Peaches and nectarines, no details	12'385	+1'474	0.8%
Pears	20'664	+5'116	1.3%
Plums	16'371	+465	0.6%
Pome fruit, no details	1'152	-3	-
Quinces	167	+76	0.2%
Stone fruit, no details	1'844	-1'989	-
Total*	**204'382**	**-47'005**	**1.6%**

Source: FiBL survey 2019
**Total includes temperate fruit areas for which no details were available*

Fruit: Temperate fruit



The total area under organic temperate fruit production recorded here (over 204'000 hectares), is 1.6 percent of the total area of temperate fruit grown in the world (12.6 million hectares in 2016, according to FAOSTAT).[1]

Of the seven most important temperate fruit growing countries in the world (China, Turkey, Iran, India, Russia, the United States, and Uzbekistan), five countries (China, Turkey, Iran, Russia,[2] and the United States) provided data on the area of organic temperate fruits in 2017. It can, therefore, be assumed that the organic temperate fruit area is higher.

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Since 2004, when data on land use and crops were collected for the first time, the temperate fruit area has more than doubled. However, some of the increase can be attributed to the continually improving crop data availability. In 2017, a drop of over 47’000 hectares occurred, this was mainly due to a decrease in China and Poland.

The key temperate fruits are apples, with 40 percent of the temperate fruit area, followed by pears, cherries, plums, and apricots (Table 31). The available data on the conversion status indicates that nearly 30 percent of the total temperate fruit area is in conversion. Thus, a considerable increase in the supply of organic temperate fruit in the near future.

Organic regulations and bilateral equivalence agreements

93 countries had regulations for organic farming at the start of 2019. It was in preparation in sixteen other countries: South Africa, Algeria, Bangladesh, Bhutan, Bosnia and Herzegovina, Burundi, Egypt, Grenada, Kenya, Kyrgyzstan, Nepal, Uganda, Pakistan, Saint Lucia, Sudan and Sri Lanka.

Since 2009, the United States has signed five bilateral equivalence agreements with Canada, the EU, Japan, South Korea1 and Switzerland. The one with the European Union entered into force on June 1, 2012. However, to export animal products to the United States or to import

apples and pears into the European Union, a certificate of non-use of antibiotics is required on both sides. The United States has also signed a unilateral agreement with Taiwan to sell their organic products there. Canada has also signed several equivalency agreements. It also extended that with the European Union to include wine making in particular. The European Union has also signed an agreement with South Korea and one with Chile.

China and New Zealand have entered into an equivalency agreement. Others are under negotiation, in particular between the European Union and Latin American countries.

Brazil did not have an equivalency agreement with other countries until recently. He signed a mutual recognition agreement with Chile in early 2019.

Switzerland and Chile concluded an equivalence agreement on organic products in 2019.

Organic fruit and vegetables in Europe

Recent production and market trends show the importance that organics and sustainable fruit and vegetables has gained over the last decade. Organic farming responds to a specific consumer demand for sustainable food products, promoting more sustainable farming practices and contributing to the protection of the environment and improved animal welfare.

This growing demand for organic products is matched by a rapidly growing production: EU organic area globally increased by 70 % in the last ten years and organic retail sales reached EUR 34 billion in 2017, providing farmers with further added value on their production.

EU Agricultural Markets Briefs are available on Europa: http://ec.europa.eu/agriculture/markets-and-prices/market-briefs/index_en.htm

Growing organic area in the EU

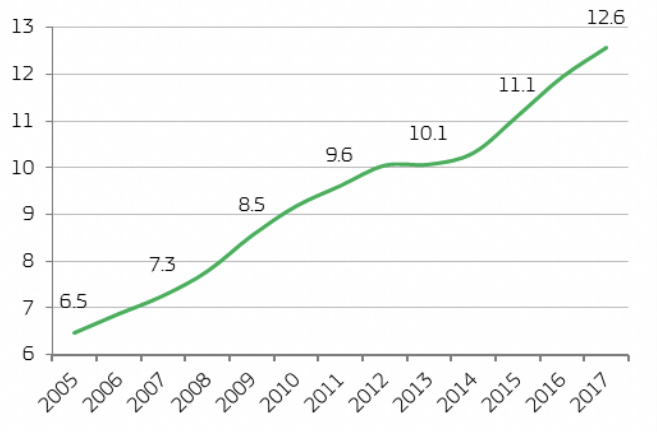
At global level in 2017, 69.8 million ha were farmed organically (including area in conversion towards organic). The EU reached 12.6 million ha in 2017, which represents 18 % of the global organic area and 7 % of total EU agricultural land. The impressive growth of organic production by 70 % over the past ten years reflects the importance gained by the sector.

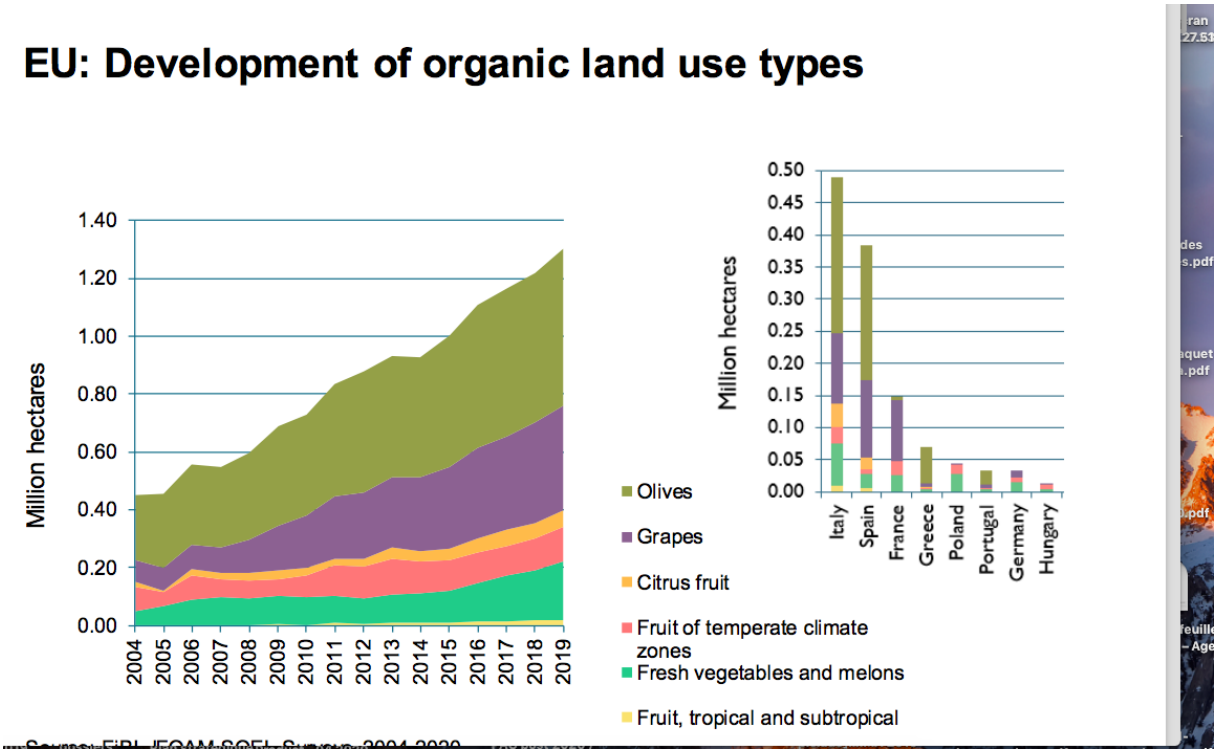
The slowdown observed in the data in 2012-2013 may be related to the change in survey methodology implemented from 2012 onwards, rather than an actual slowdown in growth agricultural land. Leading countries are Austria (23 %), Estonia (20 %) and Sweden (19 %).

The area under conversion (20% of the 12.6 million ha in 2017) provides an indication of the potential growth in the organic sector for the upcoming years. Eleven EU Member States had shares of areas under conversion between 10 % and 20 % and eleven exceeded 20 %.

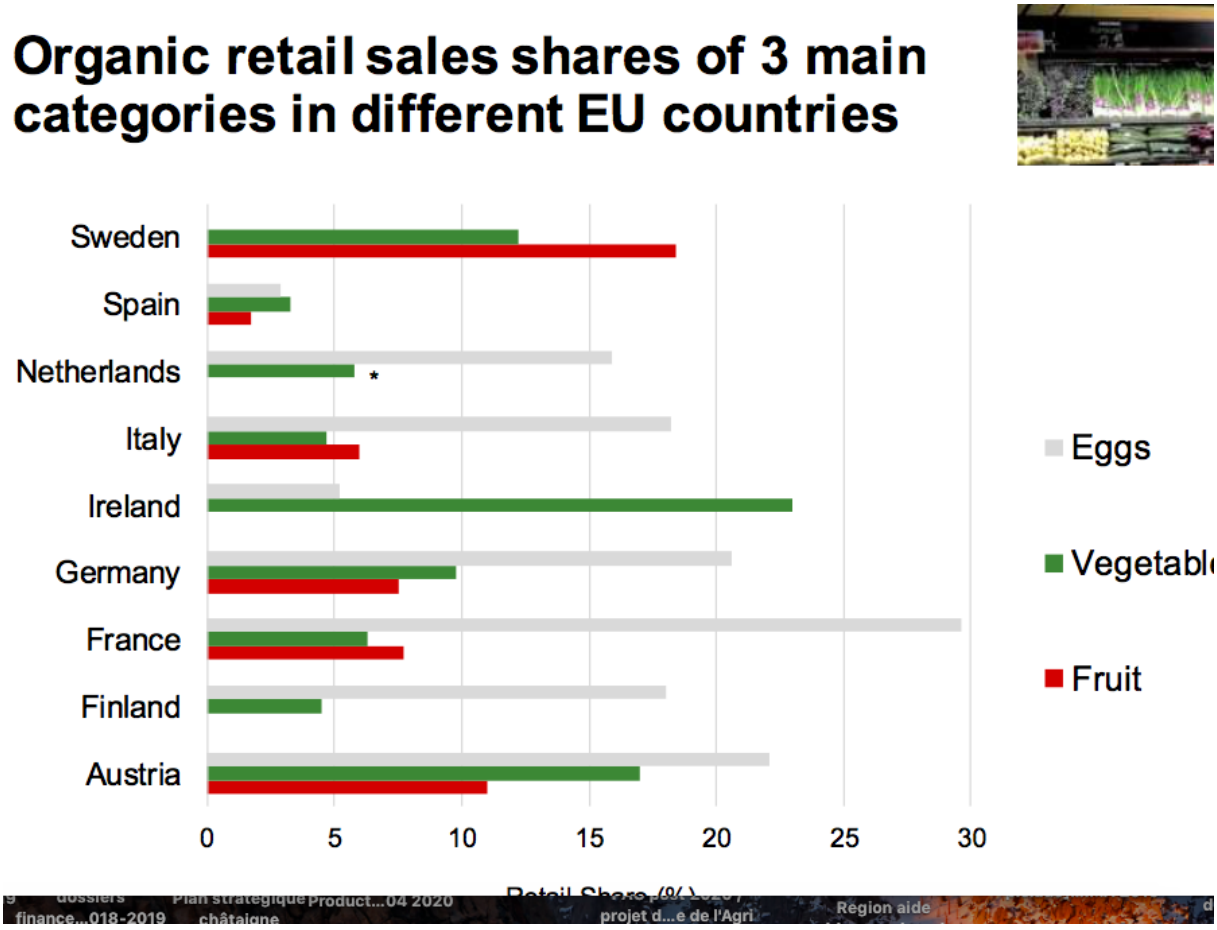
Area under conversion to organic, 2017 share of total organic area (%), by country

Source: Eurostat





Over half of the EU’s organic area is concentrated in four countries: Spain, Italy, France and Germany. However, looking at the share of organic in total agricultural land, leading countries are Austria (23 %), Estonia (20 %) and Sweden (19 %).



The area under conversion (20% of the 12.6 million ha in 2017) provides an indication of the potential growth in the organic sector for the upcoming years. Eleven EU Member States had shares of areas under conversion between 10 % and 20 % and eleven exceeded 20 %.

The main organic land uses

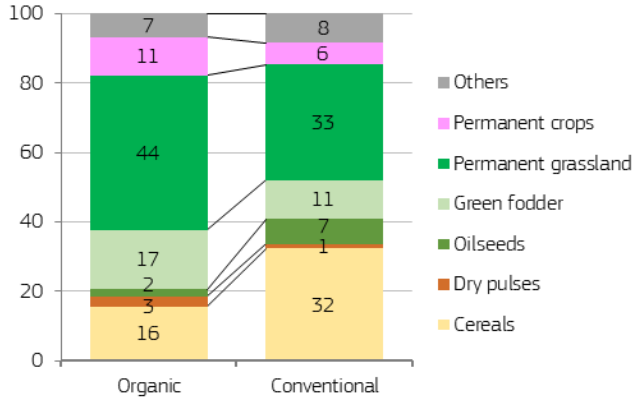
In 2016, the largest share of EU organic area was permanent grassland (44 %), representing 5.6 million ha. This area is used for organic cattle farming (both meat and dairy), which requires access to outdoor grazing areas. Further organic area is

devoted to green fodder (17 %), cereals (16 %) and permanent crops (11 %).

Land use of organic and conventional land, 2017, by crop (%)

Source: Eurostat, 2016 data for Italy

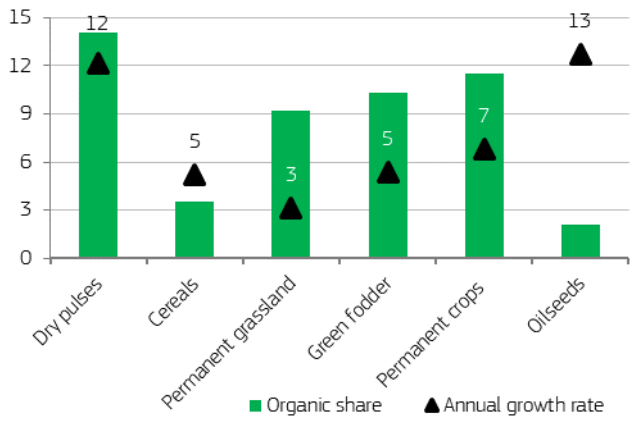
While the share of organic area in total production area of dry pulses (14 %), permanent crops (12 %), green fodder (10 %) and permanent grassland (9 %) are above the 7 % average, the share of organic cereals (4 %) and oilseeds (2 %) lags well behind, despite a strong annual growth rate of organic oilseeds area of 13 % over the period 2012-2017.



The significant production of organic permanent crops is driven by the high demand for organic fruits and organic wine. Area for organic fruit represents 29 % of the total organic permanent crop area. Spain has the largest area devoted to organic fruit (39 % of the organic fruit area). A further 24 % of the permanent crop area is devoted to vineyards, located mainly in Spain (33 %), France (24 %) and Italy (32 %)

Overall, 72 % of all organic permanent crops are grown in Spain and Italy, covering together almost 1 million ha. **–** ***Organic land use, share 2017 and annual growth rate 2012-2017, by crop (%)***

Source: Eurostat



Overall, 72 % of all organic permanent crops are grown in Spain and Italy, covering together almost 1 million ha.

Table 56: Europe and the European Union: Key crops/crop group 2017

	Crop group	Area (ha)		Organic share (%)		Change 2016-2017		Change 2008-2017	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2'529'808	1'994'581	1.9%	3.5%	8%	6%	69%	50%
	Dry pulses	442'863	386'310	8.7%	18.1%	2%	1%	207%	223%
	Oilseeds	449'439	269'694	1.3%	2.3%	6%	19%	251%	231%
	Green fodder	2'376'880	2'198'433	N/A	N/A	5%	6%	99%	92%
	Root crops	52'032	38'528	0.6%	1.2%	24%	15%	41%	33%
	Vegetables	172'792	158'928	3.4%	6.8%	17%	17%	104%	69%
Permanent crops	Berries	40'490	36'726	14.2%	22.3%	12%	10%	87%	70%
	Citrus fruit	55'081	54'322	7.5%	9.1%	12%	12%	126%	130%
	Temperate fruit	134'038	101'476	4.8%	7.8%	8%	-1%	79%	63%
	(Sub)Tropical fruit	38'146	14'016	16.8%	8.9%	25%	17%	N/A	N/A
	Grapes	340'038	323'014	8.7%	10.3%	4%	3%	166%	177%
	Nuts	313'766	264'529	18.5%	27.2%	17%	13%	111%	104%
	Olives	592'647	510'859	10%	10.2%	3%	4%	92%	72%

Source: FiBL-AMI survey 2019 based on national data sources and Eurostat. Totals for arable and permanent crops include further crop groups
Note: For crop details by country, please check crop chapter in this book from page 94 and statistics.fibl.org

Permanent crops

A large part of the permanent cropland (1.6 million hectares in Europe and 1.4 million hectares in the European Union) is used for olives, grapes, and nuts. Olives cover one- third of the permanent crop area, and grapes one fifth. Over the decade 2008-2017, the largest growth was noted for grapes, which more than tripled. In Europe, olives (0.59

1 It should be noted that for some countries, potatoes are included in the vegetable category.

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million hectares) and grapes (0.34 million hectares) cover half of the permanent cropland (Table 56). Both reach an organic share of almost ten percent of their respective totals.

The organic shares for most permanent crops were higher than those for the arable crops. However, it should be noted that the FAO data, with which the organic data are compared, do not include all berries or nut types grown in organic agriculture. Thus, a direct comparison is not possible in all cases. For more information about crop groups by country, see crop chapters in this book (page 94) and our online database at statistics.fibl.org.

- Spain and Italy had an organic **grape** area of more than 100’000 hectares each, and, together with Austria (12.2 percent), they had the highest organic shares of grapes (except some minor organic grape producers that reach even higher shares, such as the UK or Belgium). In Italy, 15.8 percent of the grape area is organic and 11.6 percent in Spain.
- For **olives**, Italy and Spain also have the lead (235'741 hectares and 195'114 hectares, respectively). Malta (32.5 percent) and France (27.3 percent) have the highest organic shares. The largest

growth occurred in Italy, where the organic olive area increased by more than 13’000 hectares in 2017.

- Temperate fruits are grown on 134’038 hectares (European Union 101’474 hectares), and they cover 4.8 percent of the total temperate fruit area (7.8 percent in the European Union). Several countries in the European Union have a considerable amount of land dedicated to temperate fruit (e.g., apples in Poland and berries in the Baltic countries, both for processing rather than for the fresh market). The most important fruits were apples (55’893 hectares), plums (15’008 hectares), and cherries (15’385 hectares). The largest temperate fruit producers are Turkey (26'073 hectares), where a major increase was noted, Italy (24'825 hectares) and France (16'707 hectares); the highest organic area shares are found in Latvia (43 percent).

In 2017, organic **vegetables**[1] were grown on more than 170’000 hectares of land in Europe, and almost 160’000 hectares in the European Union, covering 2.9 percent and 5.8 percent of the vegetable area respectively. While vegetables had the largest growth of the major crops groups in 2017, compared to the other crop groups, they did not grow as fast in the decade 2008-2017. This is because vegetables are one of the pioneer crops of organic agriculture, and strong growth already occurred in the previous decades. The largest areas were in Italy (54'720 hectares), France (20'866 hectares), and Spain (20'331 hectares). High organic shares of all vegetables are found in Denmark (33.3 percent) and Austria (24 percent).

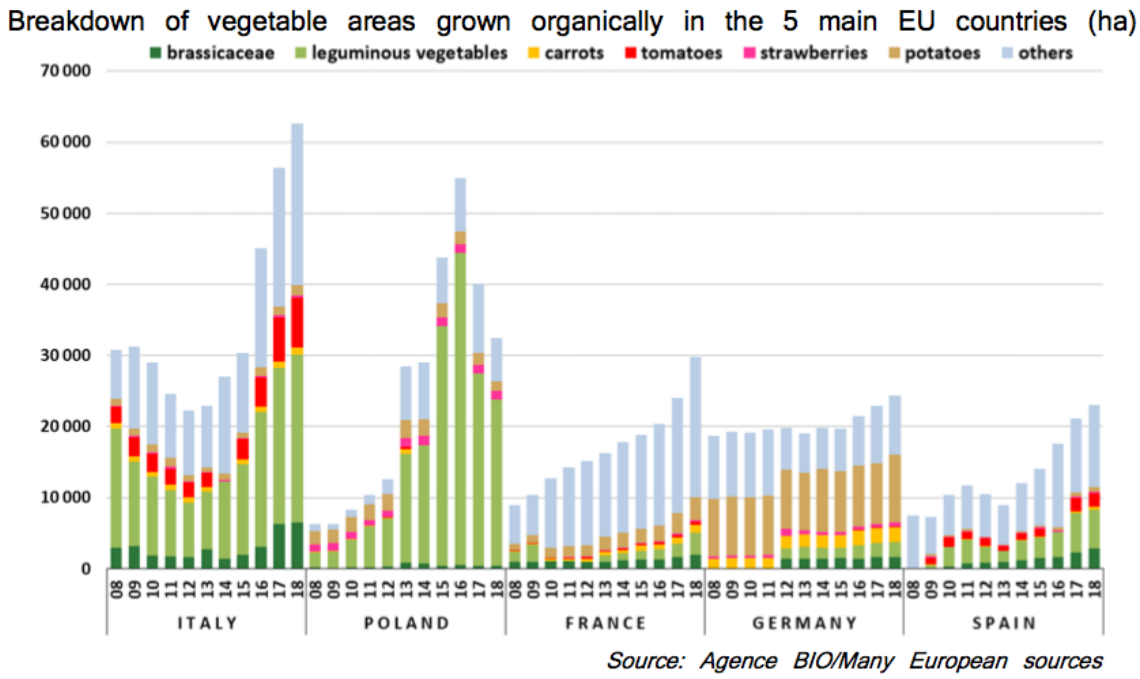
Further organic areas

In addition to the agricultural land, there are further organic areas. Large parts of these are wild collection areas constituting 17.0 million hectares (European Union: 14.7 million hectares). The largest wild collection area in Europe (and in the world) is in Finland with 11.6 million hectares (mainly berries). For country details on wild

ν Fresh organic vegetables •

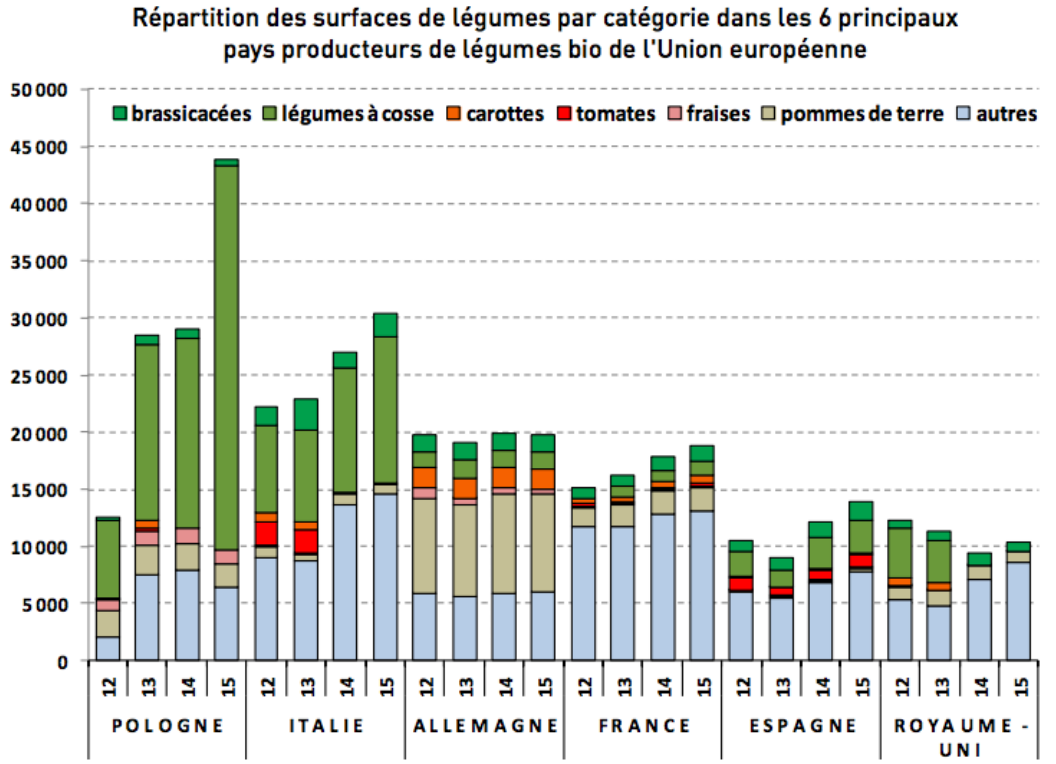
♣ The surfaces of fresh vegetables (potatoes and strawberries included) cultivated organically amounted to more than 173,500 ha in 2015 (+ 17% vs 2014). •

♣ Poland became the leading producer of organic fresh vegetables and strawberries in 2013. Between 2008 and 2015, Polish areas of fresh vegetables were almost multiplied by 7, reaching 43,803 ha. Italy came in second place (30,349 ha in 2015) and Germany in third place (19,756 ha in 2015). •



♣ The share of organic vegetable areas varies greatly from country to country. In 2014, it was 25% in Denmark and almost 20% in Poland. •

♣ The distribution between the different categories of vegetables is quite variable from one country to another. Germany stands out with a substantial share of potatoes (43% of organic vegetable areas in 2015), while



Source : Agence BIO d'après différentes sources européennes

♣ Potatoes:

More than 25,600 ha cultivated organically in the EU in 2015 (-2% vs 2014). In 2015, a third of the area of organically grown potatoes in the European Union was located in Germany (8,589 ha in 2015). 3.7% of German potato areas were grown organically in 2015. Germany produced 142,000 tonnes of organic potatoes in 2015. This dynamic is part of a context of sustained research and development. In fact, extensive trials

were carried out a few years ago in Germany concerning the varietal choice of organic potatoes.
Austria was in second place with 2,854 ha of organically grown potatoes in 2015, or 12% of the organic potato area in the European Union. 13.6% of Austrian potato areas were cultivated organically in 2015. 60,500 tonnes of potatoes were produced in Austria in 2013. The share of national areas of organically grown potatoes remains low in most countries of the European Union (1.6% in 2015 for the entire EU).

♣ Strawberries: Nearly 2,900 ha of organic strawberries in the EU in 2015 (stable vs 2014). Poland is the main producer of organic strawberries in the European Union. 2.7% of strawberry areas in the European Union were grown organically in 2015.

♣ Organic fresh vegetables are among the most consumed organic products in the European Union. Carrots and potatoes are generally the most popular organic vegetables with European consumers. In 2015, organic vegetables represented a significant market share (1) in vegetable sales in Austria (16% in supermarkets), in Denmark (14% in supermarkets) and in Germany (8.6% for vegetables and 8.9 % for potatoes). In France, the market share of organic vegetables was 4.7% in 2015.

The German organic vegetable market (including potatoes) approached € 1 billion in

2013 (2). However, German production of organic carrots and tomatoes is still far from meeting all the demand: in 2012/2013, 42% of organic carrots consumed in Germany and 87% of organic tomatoes came from abroad.

The French organic vegetable market (including potatoes) was valued at € 490 million in 2015.

ν Organic fruits (excluding strawberries and grapes)

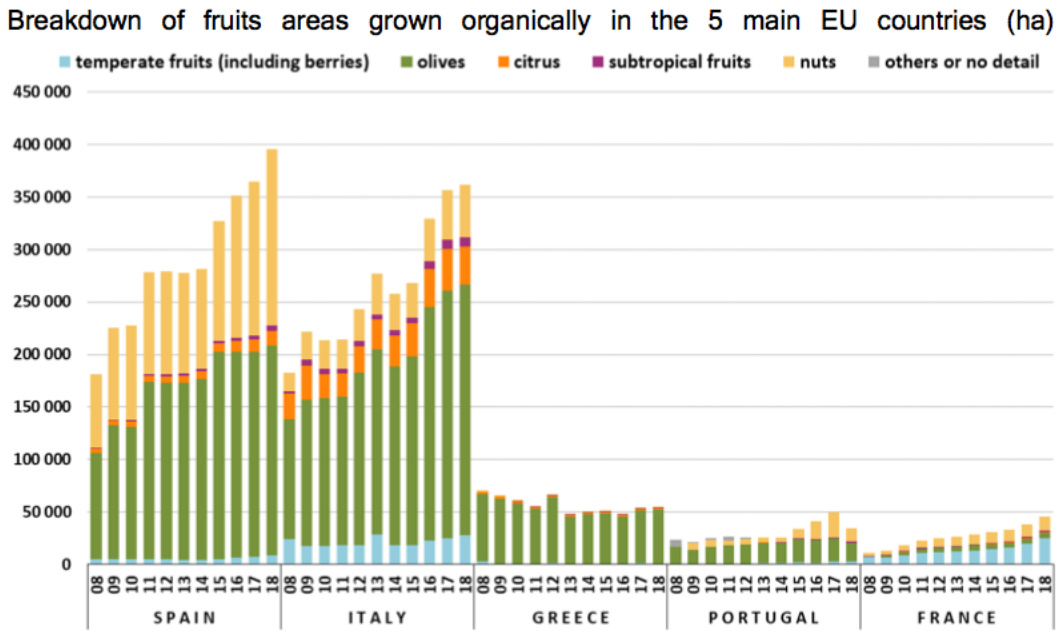
♣ Organically grown fruit areas (excluding strawberries and grapes) in the European Union amounted to more than 832,300 ha in 2015 (+ 10% vs. 2014).

The main producer country is Spain, with 39% of the orchard cultivated organically in the EU in 2015, or 327,057 ha (+ 16% vs 2014). Italy is in second position, with 268,132 ha, or 32% (+ 4% vs 2014).

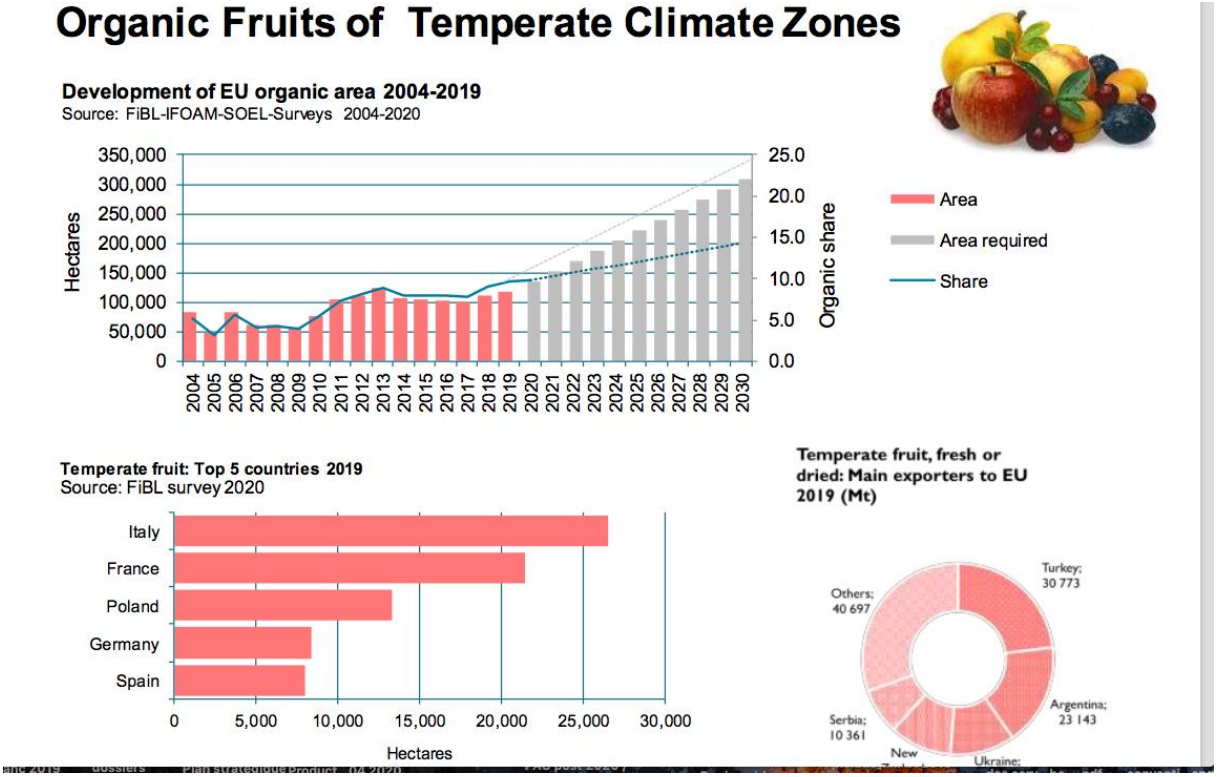
ν Organic fruits (excluding strawberries and grapes)

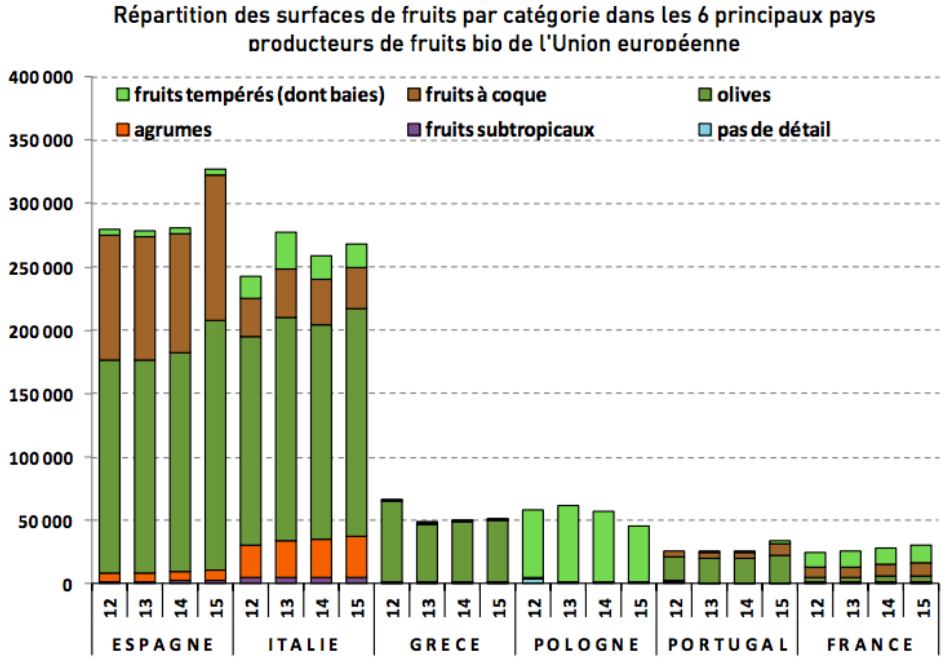
♣ Areas of fruit (excluding strawberries and grapes) grown organically in the European Union amounted to more than 832,300 ha in 2015 (+ 10% vs. 2014). The main producer country is Spain, with 39% of the orchard cultivated organically in the EU in 2015, or 327,057 ha (+ 16% vs 2014). Italy is in second position, with 268,132 ha, or 32% (+ 4% vs 2014). As with vegetables, the share of organically grown orchards varies greatly from country to country. In 2015, it approached 25% in Austria and 18% in Germany. In Italy, it exceeded 19% in 2014.
Source: Agence BIO from different European sources

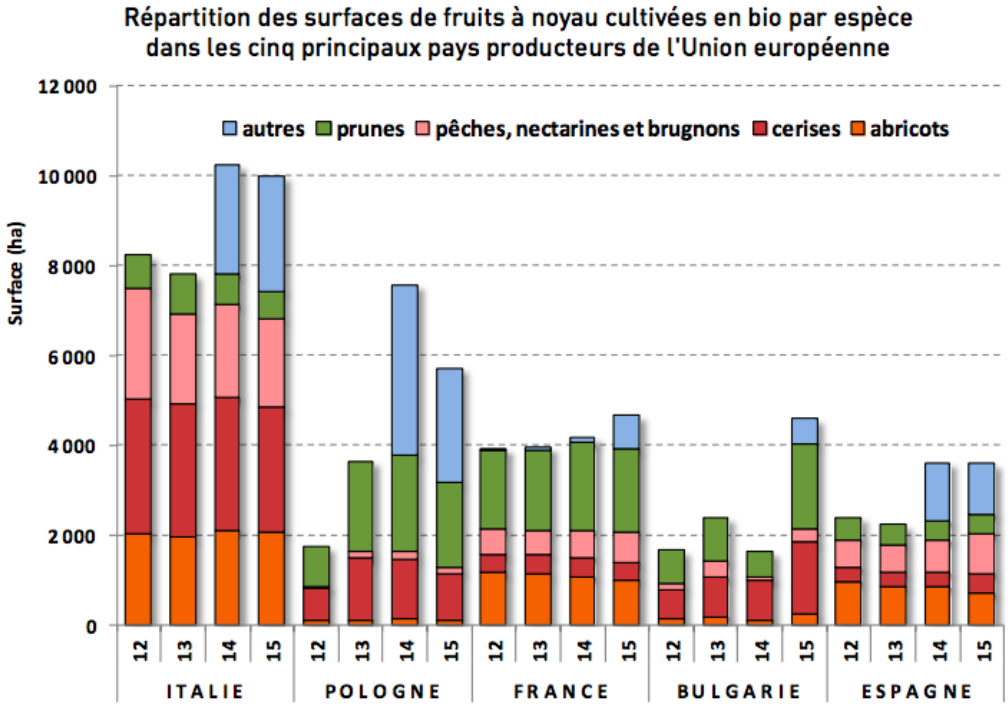
♣ The distribution between the different categories of fruit varies greatly from one country to another. In Spain, Italy, Greece and Portugal, olives are the main fruit cultivated organically (up to 93% of the areas destined for organic fruit in Greece in 2015). In Poland, as in France, temperate fruits constitute the largest part of the orchard cultivated organically.



Source: Agence BIO/Many European sources







Source : Agence BIO d'après différentes sources européennes

♣ The olive groves: More than 454,000 ha cultivated organically in the EU in 2015 (+ 9% vs 2014). In 2015, Spain was the country of the European Union with the largest area of olive groves cultivated organically with 43% of areas (197,136 ha),

ahead of Italy (179,866 ha or 40% of areas). In 2015, 24% of Spanish organic olive groves were in conversion and 25% of Italian land. In 2015, around 9.2% of olive groves in the European Union were grown organically. In 2014, the share was 14.8% in Italy and 6.9% in Spain. Even though Italy is behind Spain in terms of surface area, it produces more organic olives. Almost all Italian and Spanish organic olive production is intended for the manufacture of oil. 29% of Italian areas of organic olive groves were in Puglia in 2014. In 2015, 38% of Spanish areas of organic olive groves were in Andalusia (1) and 34% in Castile-La Mancha

• ♣ Nuts: More than 190,000 ha of organically grown tree nuts in the EU in 2015 (+ 23% vs. 2014). 60% of organically grown tree nuts were located in Spain in 2015, ahead of Italy (17%) and Bulgaria (8%). Spanish surfaces increased by 20% in 2015, while Italian surfaces fell by 7%. 22% of surfaces in Spain were in conversion in 2015 and 26% of Italian. Spanish production of organic nuts has increased to 50,006 tonnes in 2015 and 34,106 tonnes in Italy. In Spain and Italy, almonds are the main production (73% of Spanish production of organic nuts in 2015 and 55% of Italian production in 2013

• ♣ Pome fruits: More than 62,800 ha cultivated organically in the EU in 2015 (-7% vs 2014), of which 83% were apple trees. Poland is the country with the largest organic pome fruit orchard with 39% of the surface area of the European Union in 2015, or 24,695 ha (including 93% apple trees). However, a large part of the products from this orchard is not sold organically.
In 2015, 13% of the organic pome fruit orchard was located in Italy, 12% in France and 9% in Germany.

Estonia stands out with 59% of its apple orchard grown organically in 2012.

• ♣ Citrus fruits: More than 42,000 ha of citrus fruits cultivated organically in the EU in 2015 (+ 9% vs 2014). 76% of the counted organic citrus areas were in Italy in 2015, or 31,869 ha (+ 7% vs. 2014). 19.3% of Italy's citrus orchards were organically grown in 2014. 28% of Italian citrus areas cultivated organically were in conversion in 2015. Italy produced nearly 525,000 tons of organic citrus fruits in 2015. Orange is the main organic production. It comes mainly from Sicily.

Spain is in second place, far behind Italy, with 8,245 ha in 2015 (+ 17% vs 2014). 2.3% of the Spanish citrus orchard was cultivated organically in 2014. 38% of the surface area was under conversion in 2015. Spain produced 132,758 tons of organic citrus in 2015. As in Italy, orange is the main production (45% of Spanish organic citrus production in 2015). This fruit is mainly produced in Andalusia.

• ♣ Berries (excluding strawberries): Over 30,600 ha cultivated organically in the EU in 2015 (+ 6% vs. 2014). Poland occupied the first place for organic berry surfaces in 2015 (44% of surfaces), but it is very likely that not all production was marketed organically. In 2015, Lithuania came in second place (18% of surfaces).

• ♣ Stone fruits: Almost 40,000 ha cultivated organically in the EU in 2015 (+ 5% vs 2014).

Italy is the leading producer of organic stone fruits with 9,990 ha in 2015, or 25% of the area and of which 28% are cherry trees, one fifth are peach and nectarine and one fifth are apricot. It is followed by Poland with 5,706 ha in 2015, of which one third of plum trees and 18% of cherry trees and by France with 4,648 ha in 2015, of which 40% of plum trees and 21% of apricot trees

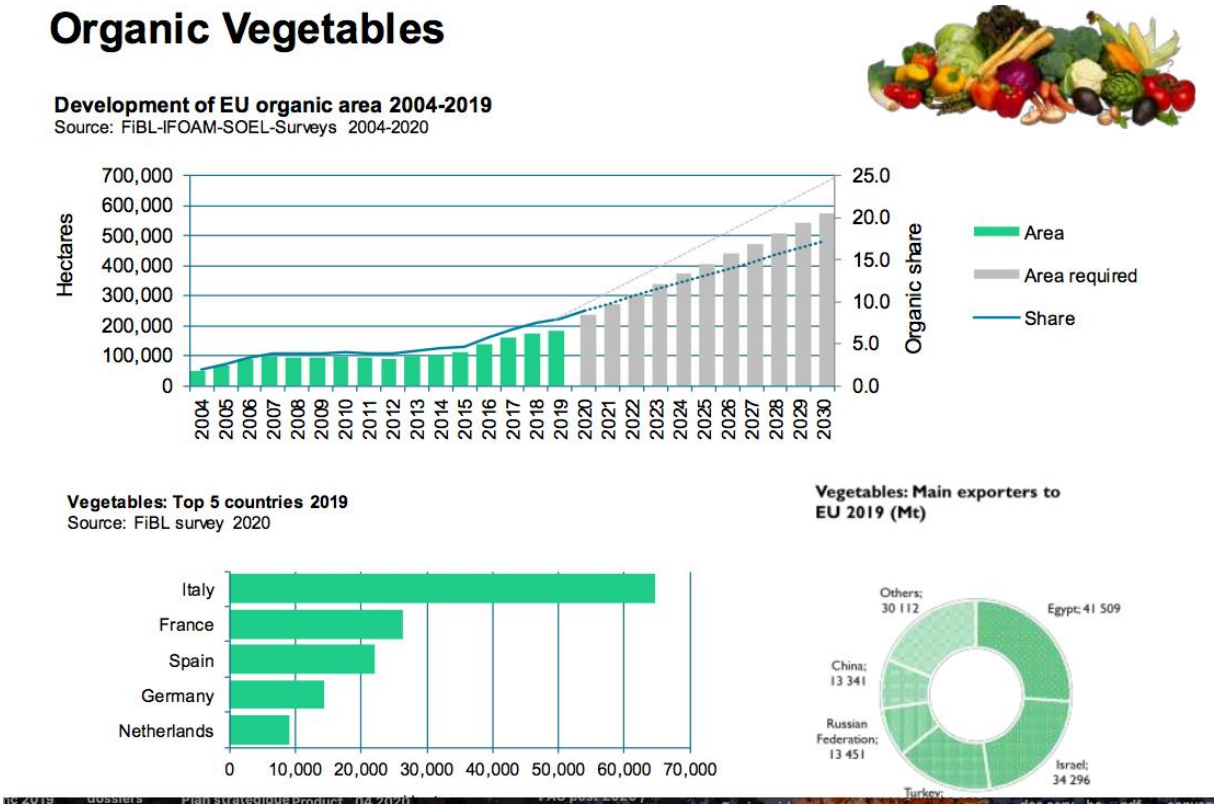
Statistics › Crops › Temperate Fruit

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Romania	6'500	4.8%	3'847	2'653
Russian Federation	51	0.01%		51
Serbia	2'080	1.5%	1'349	731
Slovakia	548	14.9%	455	93
Slovenia	325	10.0%	142	183
South Africa	77	0.1%		
Spain	6'189	3.1%	3'584	2'605
Sweden	257	14.8%	228	29
Switzerland	633	10.1%		
Turkey	26'073	5.2%	15'605	10'468
Ukraine	2'500	1.5%		
United Kingdom	1'041	5.3%	971	70
United States	11'670	4.1%		
World	**204'382**	**1.6%**	**109'503**	**59'578**

Source: FiBL survey 2019, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 331
Blank cells: No data available.

The available data on the breakdown of the fully converted and in conversion area at least 54’000 hectares of a large part of the organic vegetable area is under conversion. Thus, it can be

concluded that not a big increase of the organic vegetable supply can be expected.



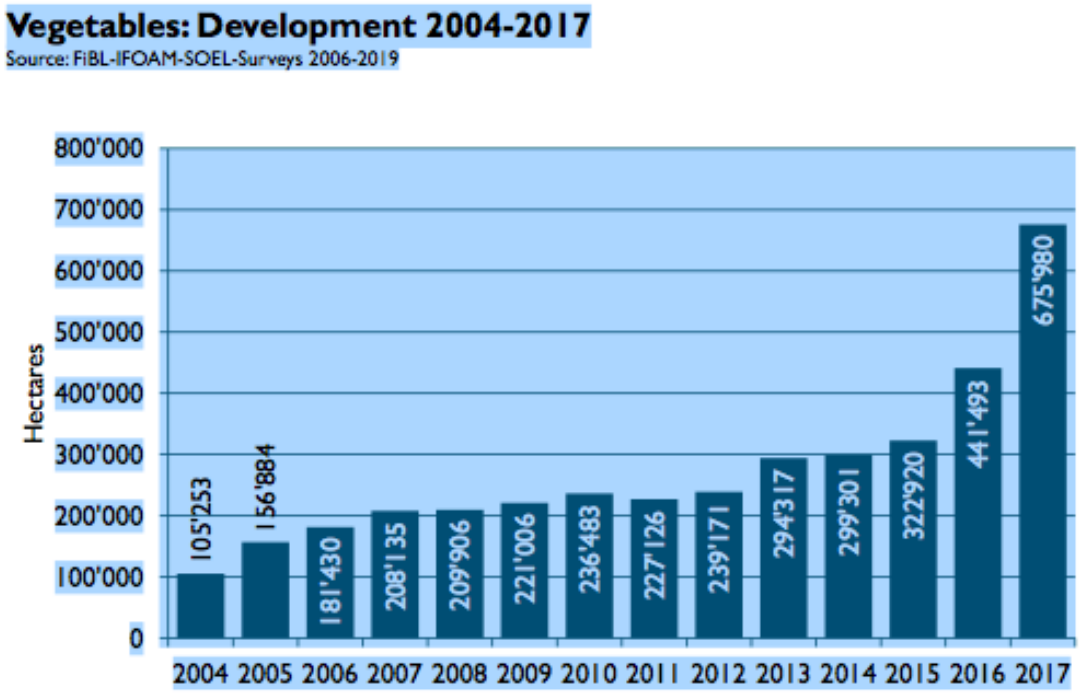


Figure 45: Vegetables: Development of the global organic area 2004-2017

3. Key imported organic products

Tropical fruit still on top of imported products

The ten most imported product categories represent 82 % of total organic import volumes in 2019. First come tropical fruit, nuts and spices with 27% (0.9 million t), followed by oilcakes with 12 % (0.4 million t), followed by cereals other than wheat and rice and by beet and cane sugar (both 7 %, 0.2 million t).

Compared to 2018 organic imports, a significant increase is observed in the volume imported of tropical fruit, nuts and spices (+13%), oilcakes (+13 %), sugar (+29 %), vegetables (+8 %), unroasted coffee, tea and maté (+11%) and soybeans (+25 %). Also, for the first time in 2019, a very small volume of organic cheese was imported (1.2 t).

Remaining top-ten product categories decreased compared to the previous year: cereals other than wheat and rice (-8 %), wheat (-16 %), oilseeds other than soybeans (-17 %), fruit other than citrus or tropical fruit (-8 %). Volume imported of

organic rice, which was in the top-ten organic products imported in 2018, decreased very sharply by 67% in 2019

(0.07 million t in 2019, compared to 0.22 million t the year before), due to the absence of organic rice imports from the United States in 2019.

Table 5 – Share of the value of the imports of organic agri-food imports per product, calculations based on adjusted values.

Rank	PRODUCTS	%
1	Tropical fruit, fresh or dried, nuts and spices	27,2
2	Unroasted coffee, tea in bulk & maté	9,0
3	Fruit, fresh or dried, excl. citrus & tropical fruit	7,3
4	Rice	5,5
5	Cocoa beans	4,6
6	Oilseeds, other than soyabeans	3,9
7	Oilcakes	3,6
8	Fruit juices	3,4
9	Olive oil	3,2
10	Other	32,4
	Total	100

FIGURE 6 – Share (%) of total organic agri-food import volumes by product category, 2018 (inner circle) and 2019 (outer circle)

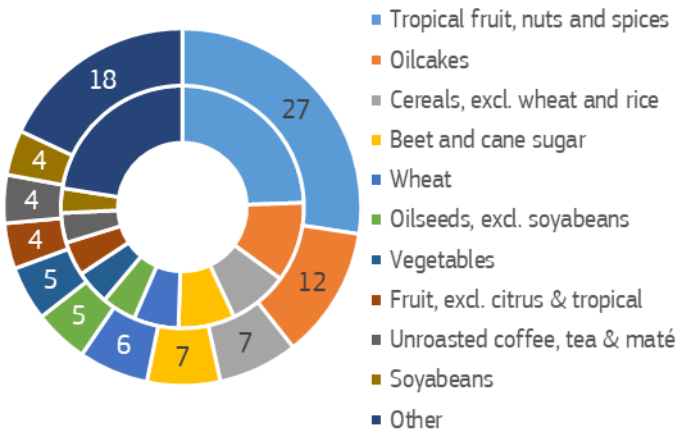


TABLE 2 - Organic fruit and vegetables import volumes by product category, 2018 and 2019 (thousand t) 5. Imports of vegetables Fruit and vegetables is the second largest group of imported organic product categories, with 1.35 million t imported in 2019 (42 % of total organic imports). The largest share is composed by tropical fruit, nuts and spices (66 %) which include mainly bananas (85 % of tropical fruit).

Imports of organic fruit and vegetables increased by 8% in 2019. A particularly strong increase is observed in imports of tropical fruit, nuts and spices, with 2019 imports close to 0.9 million t (+13 %). Two

EU imports of organic agri-food products – Key developments in 2019

Organic tropical fruit, nuts and spices are imported mainly from the Dominican Republic (34 % of total, equal to 0.3 million t), Ecuador (31 %) and Peru (15 %). Almost half of the imported organic citrus fruit originate from South Africa (46 %), while other organic fruits come from mainly from Turkey (25 %) and Argentina (17 %). About half of organic fruit juices imported come from Turkey and Mexico (both 25 %).

Middle Eastern countries are the main origin of organic vegetables, including Egypt (26 %), Israel (22 %) and Turkey (17 %). For preparations of vegetables, fruit or nuts, none of the origin countries significantly emerges over the others.

TABLE 2 - Organic fruit and vegetables import volumes by product category, 2018 and 2019 (thousand t)

TABLE 2 - Organic fruit and vegetables import volumes by product category, 2018 and 2019 (thousand t)

	2018 Imports	2019 Imports	Change (%)
Tropical fruit, fresh or dried, nuts and spices	785	886	12.8
of which bananas	*654*	*749*	*14.6*
Vegetables, fresh, chilled and dried	147	159	7.9
of which dried leguminous	*58*	*58*	*1.3*
of which potatoes	*33*	*28*	*-16.1*
of which onions, shallots and garlic	*13*	*27*	*115.5*
Fruit, fresh or dried, excl. citrus & tropical fruit	146	134	-8.5
of which apples and pears	*59*	*38*	*-36.3*
of which grapes	*20*	*22*	*11.0*
Fruit juices	89	87	-2.8
of which orange juice	*32*	*30*	*-4.6*
of which apple juice	*30*	*24*	*-20.1*
Preparations of vegetables, fruit or nuts	55	57	3.9
of which preparations of fruit	*50*	*51*	*1.0*
Citrus fruit	29	30	2.7
of which lemons	*16*	*16*	*5.9*
of which oranges	*8*	*7*	*-4.3*
Total	**1 252**	**1 352**	**8.0**

Source: *Traces*

Over 80 % of organic oilcakes are imported from China. With regard to oilseeds, important origins include China, Ukraine and India, as well as Togo for soybeans and Turkey for other oilseeds. A vast majority of organic cereals (excluding rice) is imported from Ukraine (32 % of wheat, 77 % of other cereals) and Turkey (22 % of wheat, 11 % of other cereals) as well as from Kazakhstan for wheat (31 %). Pakistan and India are the main origin country of imported organic rice (respectively 36 % and 25 % of total organic rice imports). Three-quarters of organic sugar is imported from four countries: Brazil (27 %), Colombia, India (both 18 %) and Paraguay (14 %).

FIGURE 8 – Organic cereals, oilseeds and sugar import volumes by exporting country, 2019 (million t) 5. Imports of vegetables

Fruit and vegetables is the second largest group of imported organic product categories, with 1.35 million t imported in 2019 (42 % of total organic imports). The largest share is composed by tropical fruit, nuts and spices (66 %) which include mainly bananas (85 % of tropical fruit).

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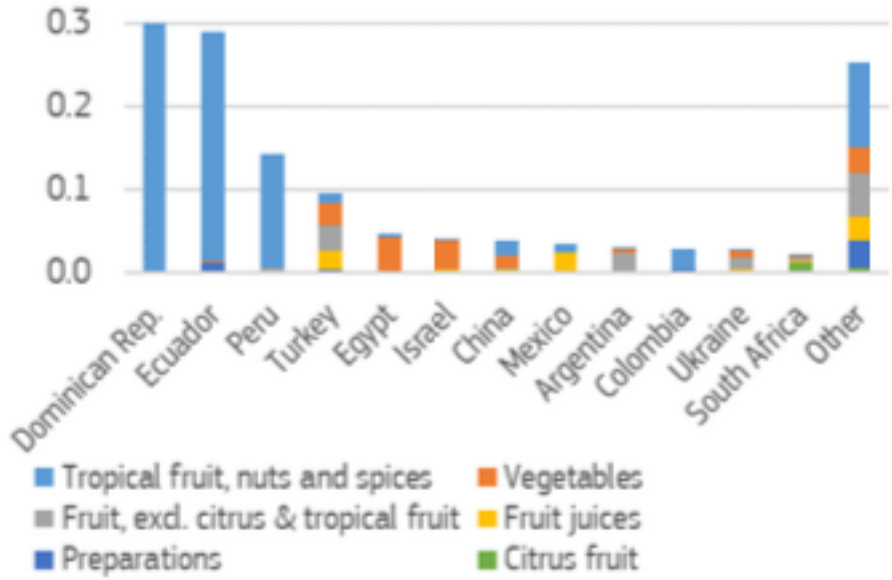
FIGURE 9 – Organic fruit and vegetables import volumes by exporting country, 2019 (million t)



Source: Traces

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TABLE 2 - Organic fruit and vegetables import volumes by product category, 2018 and 2019 (thousand t)

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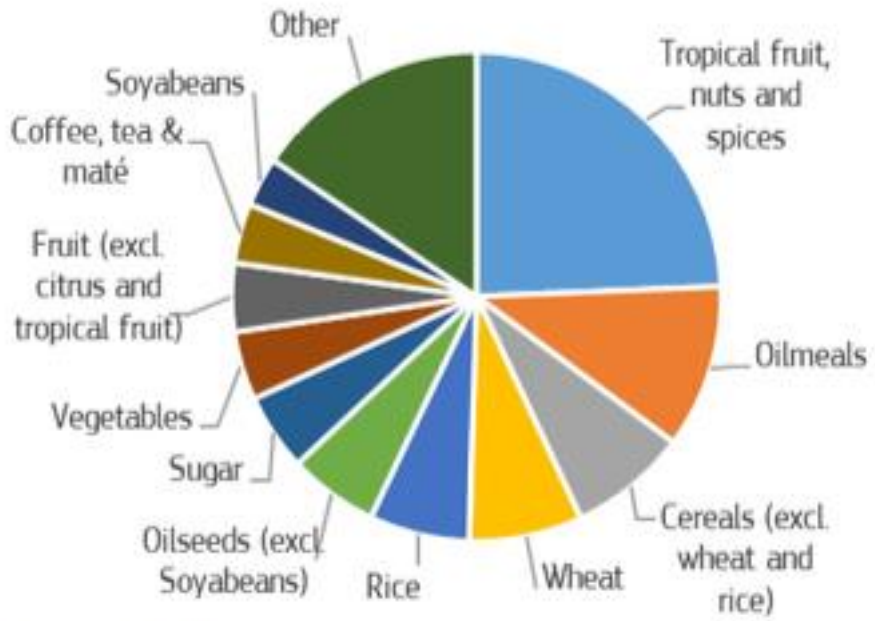
of which potatoes	*33*	*28*	*-16.1*
of which onions, shallots and garlic	*13*	*27*	*115.5*
Fruit, fresh or dried, excl. citrus & tropical fruit	146	134	-8.5
of which apples and pears	*59*	*38*	*-36.3*
of which grapes	*20*	*22*	*11.0*
Fruit juices	89	87	-2.8
of which orange juice	*32*	*30*	*-4.6*
of which apple juice	*30*	*24*	*-20.1*
Preparations of vegetables, fruit or nuts	55	57	3.9
of which preparations of fruit	*50*	*51*	*1.0*
Citrus fruit	29	30	2.7
of which lemons	*16*	*16*	*5.9*
of which oranges	*8*	*7*	*-4.3*
Total	**1 252**	**1 352**	**8.0**

5

EU organic imports, share in volume (t), 2018[18]

Figure 21 – EU organic imports, share in volume (t), 2018[18]



Source: DG AGRI

TABLE 7 - Organic import volumes by product category, 2018 and 2019 (t)

Rank	Product categories	2018 imports	2019 imports	Change (%)	Share in total (%, 2019)	Cumulated share (%, 2019)	*Estimated share organic/total imports (%, 2019)*
1	Tropical fruit, fresh or dried, nuts and spices	785 162	885 930	12.8	27.3	27.3	*9*
2	Oilcakes	341 663	385 924	13.0	11.9	39.2	*2*
3	Cereals, other than wheat and rice	254 197	233 179	-8.3	7.2	46.4	*1*
4	Beet and cane sugar	165 811	213 797	28.9	6.6	53.0	*8*
5	Wheat	241 882	203 927	-15.7	6.3	59.3	*4*
6	Oilseeds, other than soyabeans	192 514	160 137	-16.8	4.9	64.2	*2*
7	Vegetables, fresh, chilled and dried	147 471	159 155	7.9	4.9	69.1	*3*
8	Unroasted coffee, tea in bulk & maté	127 232	141 383	11.1	4.4	73.5	*4*
9	Fruit, fresh or dried, excl. citrus & tropical fruit	146 111	133 723	-8.5	4.1	77.6	*3*
10	Soyabeans	105 870	132 079	24.8	4.1	81.7	*1*
11	Fruit juices	89 008	86 519	-2.8	2.7	84.4	*4*
12	Rice	216 017	70 509	-67.4	2.2	86.5	*3*
13	Cocoa beans	74 100	65 751	-11.3	2.0	88.6	*3*
14	Preparations of vegetables, fruit or nuts	54 847	56 983	3.9	1.8	90.3	*3*
15	Sugar, other than beet & cane	39 400	43 186	9.6	1.3	91.7	*2*
16	Palm & palm kernel oils	39 644	40 586	2.4	1.3	92.9	*0*
17	Olive oil	30 125	33 621	11.6	1.0	94.0	*19*
18	Citrus fruit	29 042	29 837	2.7	0.9	94.9	*1*
19	Food preparations, not specified	17 994	22 725	26.3	0.7	95.6	*5*
20	Wine, vermouth, cider and vinegar	21 062	19 937	-5.3	0.6	96.2	*1*
21	Flours and other products of the milling industry	20 324	19 304	-5.0	0.6	96.8	*10*
22	Eggs and honey	17 808	18 032	1.3	0.6	97.3	*8*
23	Bulbs, roots and live plants	12 484	13 519	8.3	0.4	97.8	*5*
24	Vegetable oils other than palm & olive oils	10 155	13 005	28.1	0.4	98.2	*0*
25	Miscellaneous seeds and hop cones	7 332	9 157	24.9	0.3	98.4	*9*

TABLE 14 - Organic import volumes of vegetables, fresh, chilled and dried, by exporting country, 2018 and 2019 (thousand t)

	2018 imports	2019 imports	Change (%)	Share (%, 2019)
Egypt	32.4	41.5	28.2	26.1
Israel	33.8	34.3	1.4	21.5
Turkey	34.1	26.4	-22.4	16.6
Russian Federation	7.2	13.5	87.6	8.5
China	10.6	13.3	25.8	8.4
Ukraine	3.6	6.9	95.5	4.4
United Arab Emirates	5.2	0.0	-100.0	0.0
Total	**147.5**	**159.2**	**7.9**	**100.0**
Share selected countries in total (%)	*86*	*85*		

Source: Traces

TABLE 18 - Organic import volumes of fruit juices by exporting country, 2018 and 2019 (thousand t)

	2018 imports	2019 imports	Change (%)	Share (%, 2019)
Turkey	22.9	21.9	-4.8	25.3
Mexico	19.1	21.6	13.2	25.0
Morocco	5.7	6.4	11.9	7.4
Ukraine	5.9	4.5	-24.8	5.2
China	5.8	2.3	-59.9	2.7
Total	**89.0**	**86.5**	**-2.8**	**100.0**
Share selected countries in total (%)	*67*	*66*		

Source: Traces

TABLE 16 - Organic import volumes of fruit, fresh or dried, excluding citrus & tropical fruit, by exporting country, 2018 and 2019 (thousand t)

	2018 imports	2019 imports	Change (%)	Share (%, 2019)
Turkey	30.1	30.8	2.4	23.0
Argentina	30.3	23.1	-23.5	17.3
Ukraine	13.0	14.7	13.1	11.0
New Zealand	16.8	14.1	-16.3	10.5
Serbia	13.1	10.4	-20.8	7.7
Chile	14.5	9.6	-34.1	7.1
Morocco	5.1	5.5	6.9	4.1
Total	**146.1**	**133.7**	**-8.5**	**100.0**
Share selected countries in total (%)	*84*	*81*		

Source: Traces

Regulations

According to data collected by IFOAM – Organics International and FiBL, 72 countries had fully implemented organic regulations as of 2020. Twenty-two countries had regulations, which were not fully implemented, while 14 countries were in the process of drafting legislation (Table 45, Table 46).

Among the countries that passed new organic regulations in 2020 are Madagascar and Egypt. There are also countries that are going through major revisions of their existing regulations; among these are the European Union and the United States. Countries that have concluded significant amendments of their existing regulations in 2020 include the Philippines and Peru.

Table 45: Status of organic agriculture regulation: Number of countries by region 202(

Region	Drafting	Fully Implemented	Not fully Implemented	Total countries
Africa	5	1	4	10
Asia	7	10	11	28
Europe		39	4	43
Latin America and the Caribbean	2	16	3	21
North America		2		2
Oceania		4		4
Total	**14**	**72**	**22**	**108**

Source: IFOAM – Organics International 2021

In an increasingly regulated world and with a growing global organic market, trade and equivalence agreements are increasingly relevant and desired in order to lift trade barriers. In 2020, Taiwan was the most active actor in negotiating equivalence agreements. Taiwan's revised organic regulation that came into force in May 2019 included a one-year timeline for converting existing unilateral recognitions by Taiwan into bilateral equivalency agreements; otherwise, they would expire.

By autumn 2020 Taiwan had signed five new bilateral equivalency agreements with Japan, Australia,

Organic European market

Europe: 92% of European organic consumption in the EU

In 2017, of the top ten global organic markets, seven were located in Europe. The European market for organic products amounted to € 39.8 billion in 2017, or 42.9% of the global organic market, including € 36.8 billion in the European Union1 (39.7% of the global organic market). Specialized distribution is much more developed in Europe than in the rest of the world. However, in 2017, large retailers were responsible for most of the growth of the organic market in Europe. Most of the major European retailers now offer organic products under private labels. The use of organic products in out-of-home catering has developed in many European countries.

Focus on some European countries

Healthy growth continued in most country markets in 2017, with some countries (such as France and Denmark) reporting exceptional growth. As will be shown later, there are significant differences in Europe between market sizes and sales per capita.

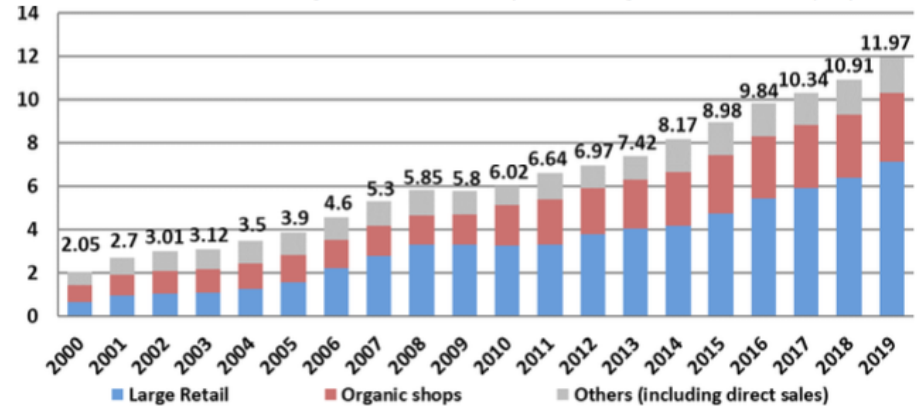
Europe has the largest concentration of organic food retailers in the world. Most are located in Germany, France, and Italy. Much of the growth however is coming from mass market retailers, such as supermarkets, hypermarkets, and discounters. Almost all leading food retailers are marketing organic foods under their private labels. In countries like Switzerland and Denmark, retailer private labels generate the most sales for many organic product categories.

Organic foods are also making inroads in the catering and foodservice sector, with a growing number of restaurants, coffees, bars, and canteens using organic ingredients and / or serving organic products. Some governments are encouraging schools and government canteens to use organic ingredients.

Central & Eastern European (CEE) countries, such as Poland, Hungary, and Romania, have traditionally been important growers and exporters of organic crops. However, internal markets are slowly developing in these countries.

Germany is in second place globally with 11% of the organic market in 2017. In 2018, the German organic market grew by 5.5%, reaching 10.91 billion € 1 and the market share of these products amounted to 5.3%. 95% of German households bought an organic product at least once in 2017.

Evolution of the German organic market (excluding out-of-home) (in € billion)



: "Other circuits": bakeries, butchers, fruit & vegetable stores, weekly markets, farm sales, basket bscriptions, mail order, service stations and health food stores (including Reformhäuser). "Organic ops": include large farm stores (with more than € 50,000 in sales)

Source: German working group on the organic market

Supermarkets remained the main sales channel for organic products in 2018 (59%), its organic sales increased by 8.6% in 2018. In 2017 and 2018, supermarkets continued to increase their offer of organic products. In 2018, there were nearly 2,600 specialized organic stores. Specialized distribution represented 26.9% of the German organic market in 2018. Sales in this channel only increased by 0.8% in 2018. In recent years, specialized distribution has suffered from increased competition from large retailers. . However, the situation seems to have improved in 2019. The sale of organic products online is growing, but many projects are not proving to be profitable. Animal welfare is the main reason for buying organic products mentioned.

The most purchased organic products are eggs, dairy products, vegetables and fruits.

France was the world's third largest market for organic products in 2017. It reached € 9.69 billion in 2018 (+ 16% vs. 2017) with a market share (excluding RHD) of 4.8%. 88% of French people declared having consumed organic products in 2018, including 71% of French people at least once a month in 2018 and 12% at least once a week3.

Large-scale distribution remained the leading sales channel in 2018 (46.2%) 4, ahead of specialized stores (31.9%), direct sales (11.7%), catering (5.7%) and artisans-traders (4.4%). In recent years, the supermarket chains have launched specialist store chains. During the first three quarters of 2019, sales of organic fixed-weight products in supermarkets increased by 20.5% overall compared to the same period of 2018. The channel specialized has been developed for a long time. France is even a forerunner in this area since it is here that the first chain of organic stores and the first organic supermarkets were born. There are now around fifteen organic store chains and, in total, more than 2,923 independent or network stores. In 2018, direct sales and sales to artisans and traders remained dynamic. Online sales are developing, in particular thanks to the operator Greenweez.

The main reasons for consuming organic products are the preservation of health, the quality and taste of the products, the

preservation of the environment and animal welfare. Price remains the main obstacle to the growth of the organic market. Fruits and vegetables are the main organic products consumed in France.

The **Italian** organic market approached € 4.09 billion in 2018 (+ 15% vs 2017) and the market share of organic products reached 3.5%. 86% of Italian households bought an organic product at least once in 2018. 60% of consumers consumed organic products at least once a week.

In 2018, large-scale distribution represented 47% of the Italian organic market, specialized distribution 21%, catering 15% and other channels 17%. While specialized distribution has long dominated the Italian organic market, we have seen faster growth in sales of organic products in supermarkets since 2011. In 2018, sales of organic products in supermarkets increased by 21% compared to 2017. The space dedicated to organic

products in mass distribution has been growing for several years. Currently, all the brands offer organic products. The self-service offer, in particular for fruit and vegetables, is developing in this circuit. Sales of organic products in stores Organic specialty stores fell by 2.3% in 2018 compared to 2017. There were 1,354 organic specialty stores in 2018. This channel is very fragmented: 21% of stores are completely independent. Online sales of organic products more than quadrupled between 2008 and 2017. 375 websites offered organic products in 2018. In 2018, 2,857 organic farms practiced direct sales. During the first half of 2019, the organic products market (excluding catering) increased by 1.5% compared to the first half of 2018.

The consumption of organic products is more developed in the north of the country.

Food safety is the main reason for buying organic products.

The most popular organic products are fruits, vegetables, cereal products, olive oil, eggs and honey.

The **Swedish** organic market was estimated at € 2.7 billion in 2018 and 2019. After strong growth in 2014 and 2015, it experienced a slowdown, then almost stagnation in 2019 (+ 1% compared to 2018). The market share of organic products was 9.0% in 2019.

In 2019, supermarkets represented a little more than half of the Swedish organic market, ahead of the monopoly (19%),

catering (20%) and online sales (5%). In supermarkets, organic sales fell in 2019, but they continued to grow in the Swedish monopoly (+ 6%). Sales of organic products in catering and online continued to grow in 2019. Sales of organic products on the Internet could increase significantly in the coming years.
The main reasons for consuming organic are health, environmental protection and animal welfare.
The **Spanish** organic market was valued at € 2.1 billion in 2018 (i.e. + 7% vs. 2017). In 2018, around 475,000 Spaniards consumed at least one organic product per week (compared to less than 300,000 in 2013).
The growth of the Spanish organic market is strongly linked to the development of the supply in supermarkets, in particular under private labels. Carrefour has started to open Carrefour Bio stores in Spain. Specialized distribution therefore faces more competition from supermarkets than before. The introduction of organic products in RHD is developing.
The demand for organic products is particularly high in Catalonia, Madrid, Valencia and the Basque Country.
Generation Y is the main category of consumers of organic products in Spain.
Vegetables, meat, fruits and cereals are the most popular organic products
Health is the main reason for buying organic products.

The Spanish organic market should continue to grow strongly over the next few years, in particular thanks to the development of organic consumption by young people.

In **Belgium,** the organic market was estimated at € 760 million 1 in 2018 (+ 15% vs. 2017) and the organic market share reached 3.2%. In 2018, 95% of Belgians bought an organic product at least once. Organic consumption is significantly higher in Wallonia than in
Flanders.

Supermarkets remained the main sales channel for organic products in 2017 (56%). It offers a lot of organic products under private label. Organic specialty stores were the second largest distribution channel, with a quarter of the organic market. Unlike the situation
In many neighboring countries, their share is growing every year, to the detriment of direct sales and those of artisans. At the end of 2018, Belgium had around 600 specialized organic stores. Online sales and drives seem to develop more slowly than in France.

Vegetables, dairy products and fruits are the most popular organic products in Belgium.

The organic markets of Central and Eastern European countries represented only 2% of the EU organic market in 2017.

Poland was in first place with € 250 million in 2017 (+33% vs 2016), but organic products still only represented 0.5% of the food market. In 2018, around 30% of Poles bought organic products, but only 4% did so on a regular basis. The GMS represented the first sales channel for organic products. There are organic specialty stores, mostly located in large urban areas. The sale of organic products online is growing. Health and food safety are the main reasons for buying organic products.

In 2017, the **Czech** organic market reached € 133 million (+ 30.4% vs. 2016) and the market share of organic products 1.17%. Supermarkets remained the main distribution channel for organic products (40.5%), ahead of drugstores, online commerce and specialized and health food stores. The GMS has increased its offer in recent years. Direct selling is growing, especially on the Internet and in the markets. The most popular organic products are processed products. The main obstacle to the development of the consumption of organic products is the price.

The **Romanian** organic market was valued at € 41 million in 2016. In 2018, organic products represented less than 1% of sales of food products in supermarkets, while this circuit constituted more than two-thirds of the Romanian organic market. A small percentage of the products sold in the markets are organic. Organic specialty stores are rare. The sale of

organic products online is growing. Dairy products are the main organic products sold, ahead of infant food. Price sensitivity remains a major drag.

The **Hungarian** organic market was valued at € 30 million in 2015. The GMS is the leading channel for marketing organic products, almost all brands offer them, most often under private labels. Online sales of organic products are growing. Organic products are also sold in specialized distribution and on markets. The main obstacles to the consumption of organic products are the price and the lack of confidence.

■ In **Portugal** there is no overall estimate of the organic market, but sales of packaged organic products and drinks were valued at € 60.5 million in 2017. 47.7% of Portuguese regularly buy organic products.

In recent years, there has been a strong increase in local demand for organic products, which has led to the development of specialized distribution, organic markets and organic supply in supermarkets. Supermarkets are the primary sales channel for organic products. These are also sold in marketplaces, online and through AMAP.

■ The **Greek** organic market was estimated at € 66 million in 2017 (stagnation vs 2016). Since the economic crisis, the market has not started to rise again. Supermarkets represented 68% of the organic market in 2016, ahead of specialized

distribution (27%). There are very few organic products online and in catering.

The main reasons for buying organic products are the non-use of chemical additives, natural treatments and health. The main obstacle is the lack of confidence in organic products.

A dynamic European Consumption

♣ Organic fresh fruits are among the most consumed organic products in the European Union. Bananas and apples are the most popular organic fruit with European consumers.

Organic fragrance, aromatic and medicinal plants: Almost 44,300 ha of PPAM cultivated organically in the EU in 2015 •

Significant products include food not or little produced in the EU, such as tropical fruits and nuts (24 % of organic import volumes) and coffee and tea (4 %), or commodities with a low share of organic EU production, including cereals (22 %

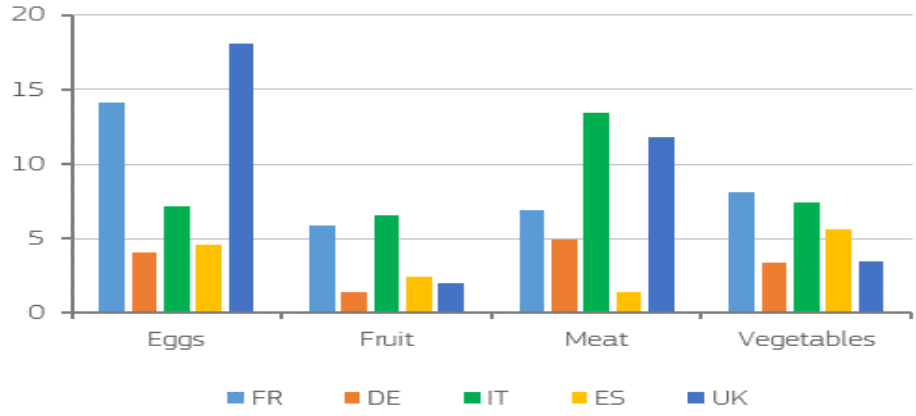
The EU ranks second in global organic consumption

In 2017, the global organic food and drink market reached EUR 92 billion. The US accounts for 47 % of the global market, followed by the EU, with 37 % (EUR 34.3 billion). Over the last ten years, the EU market doubled its size and it continues growing at a significant pace (11 % in 2017 compared to 2016), indicating that it has not yet reached its maturity stage.

The penetration of organic food products varies significantly between countries. The largest EU markets for organic are Germany, with 10 billion EUR (5.1 % organic in total retail

sales), and France, with 7.9 billion EUR (4.4 %). The French organic retail market is a good example of a country where organic has overcome its introduction stage and has now earned its place. Consumers have become more environmentally aware and organic sales increase significantly (18 % in 2017).

Organic fresh fruit and vegetables represent another success story of organic farming, with over 10 % organic consumption in Austria, Denmark and Sweden, and a sustained growth rate.



3.3 Further organic areas

In addition to the agricultural land, there are further organic areas. Large parts of these are wild collection areas constituting 17.0 million hectares (European Union: 14.7 million hectares). The largest wild collection area in Europe (and in the world) is in Finland with 11.6 million hectares (mainly berries). For country détails on wild

Table 60: Organic shares for retail sales values (euros) for selected products 2017

	Austria	Belgium	Czech Republic (2016)	Denmark	Finland	France	Germany	Netherlands	Nor-way	Spain	Sweden	Switzerland	UK
Baby food					15.0%	12.7%			33.1%				
Beverages			0,4%			5.%			0.6%		5.6%	3.3%	
Bread & bakery products		2.4%	0.4%		1.0%	3.4%	8.%	1.4%	1.9%		3.5%	4.9%	0.3%
Eggs	21.6%	14.5%		32.6%	17.0%	29.6%	21.%	15.3%	8.7%	2.9%		26.6%	6.9%
Fish and fish products		0.4%				2.5%		1.2%	0.8%	0.6%	12.9%		0.8%
Fresh vegetables	15.3%			20.4%	3.9%	6.3%	9.7%		4.5%	3.3%	12.2%	23.1%	4.3%
Fruit	10.9%			18.8%		7.7%	7.8%		2.3%	1.7%	18.4%	13.9%	2.7%
Vegetables and fruit			1.3 %		3.9%	6.9%		4.0%				16.9%	
Meat and meat products	4.5%		0.2%		1.1%	2.4%	2.5%	3.3%	0.5%	1.2%	2.9%	5.6%	1.4%
Milk and dairy products	11.1%		1.4%			4.4%		4.3%	2.0%	1.1%	10.4%	12.9%	3.8%
- Butter	10.6%	4.7%		16.4%		5.6%	4.5%		3.1%				2.1%
- Cheese	9.6%			5%	3.%	1.6%	4.7%		0.7%			6.7%	1.1%
- Milk	18.5%	3.3%		31.6%	4.%	12.7%	12.1%		4.0%			16.7%	5.9%
- Yoghurt	13.9%	8.5%		18.6%	2.%	6.9.%	8.1%		0.7%				8.2%

Sources: FiBL-AMI survey 2019, based on data from Austria: RollAMA based on GfK, Belgium: LV based on GFK; Czech Republic: UZEI; Denmark: GfK ConsumerScan, provided by LF, Finland: Pro Luomu; France: Agence Bio (only supermarkets/general retailers). For baby food: Data from 2017, supermarket sales only; Germany: Agricultural Market Information Company AMI based on GfK; Netherlands: Bionext; Norway: Nielsen Norway; Sweden: Statistics Sweden (excludes alcoholic beverages); Switzerland: Bio Suisse based on Nielsen; UK: Soil Association. Note: Due to classifications and nomenclatures differing from country to country, it is not possible to supply data for all product groups, even if data for individual products may be available. Not all countries have data on the market shares of organic products. Please note that the products shown in the table above are a selection.

The European Union (EU) organic farming rules cover agricultural products, including aquaculture and yeast. They encompass every stage of the production process, from seeds to the final processed food. This means that there are specific provisions covering a large variety of products, such as

- seeds and propagating material such as cuttings, rhizome etc. from which plants or crops are grown,
- living products or products which do not need further processing,
- feed,
- products with multiple ingredients or processed agricultural products for use as food.

Producing organically means respecting the rules on organic farming. These rules are designed to promote environment protection, maintain the biodiversity of Europe and build consumer trust in organic products.

The EU rules on Organic Production (OP), considering the experience gained for the application of Regulation (EC) No 834/2007, identified several points of improvement, in order to correspond to the high expectations of consumers, and to clarify the products concerned by the Regulation. Therefore Regulation

(EC) No 834 will be repealed and replaced from the 1st of January 2021 by the new Regulation (EC) No 2018/848.

The CAP, a supporter of organic

The EU recognizes the role of organic farming as an asset for both the land and for consumers. Under the Common Agricultural Policy – CAP for the period 2014-2020, organic farmers can benefit from several support measures.

Overall, organic farmers receive more subsidies under agri-environment and animal welfare subsidies than conventional growers, in particular support for maintenance and conversion to organic farming. In 2016, 56 % of EU organic land was granted this support, receiving on average EUR 139/ha of CAP support and EUR 75/ha national co-financing. They also receive higher support under the Areas with Natural Constraints (ANC, Less Favoured Areas (LFA) under the 2007-2013 CAP), which encourages agriculture in areas with natural handicaps. Further Rural Development measures also support the development of organic production including investments in organic farming practices and aid for marketing and promotion of organic products. Organic farmers receive therefore higher subsidies under Rural Development than their conventional counterparts do.

In addition, organic producers qualify under the requirements for greening payments. Producer organisations of organic fruit and vegetables also benefit from increased co-financing rates through operational programmes. Overall, organic farmers usually (with a few exceptions) benefit from higher total EU subsidies.

National and regional supports to organic boosts supply and demand

Alongside EU aid, almost all EU countries have also shown their determination and willingness to develop the organic sector. Strategic national or regional plans support organic land use and consumption of organic. For example, Germany launched a program in 2017 to reach a 20 % share of organic area by 2030. Further countries launched similar programs to increase the organic surface[19].

On the consumption side, national plans usually target public procurement of organic, for consumption in public schools, kindergartens, hospitals and residential homes. For example, in Copenhagen (Denmark), 90 % of meals served in public entities were organic, just one year following the launch of a program for organic in 2015. Similarly, in Sweden, the objective was set to reach 60 % share of organic in public sector consumption by 2030. At the end of 2018, consumption of a wide range of products already overpassed 50 %, including coffee and tea, leguminous plants and seed, cereals, dairy products, eggs, fish and other seafood). Similar strategies are found in a number of countries, including non- exhaustively Croatia, Finland, France, Germany, Italy, Latvia and Slovenia[20]

A New legislation from 2022

New organic legislation will enter into force on 1 January 2022, further to the postponement of its implementation for a year. The rules will reflect the changing nature of this rapidly growing sector. The new regulation is designed to ensure fair competition for farmers whilst preventing fraud and maintaining consumer trust through the following:

- production rules will be simplified through the phasing out of a number of exceptions and opt outs;
- the control system will be strengthened thanks to tighter precautionary measures and robust checks along the entire supply chain;
- producers in third countries will have to comply with the same set of rules as those producing in the EU;

- organic rules will cover a wider list of products (e.g. salt, cork, beeswax, maté, vine leaves, palm hearts) and will have additional production rules (e.g. deer, rabbits and poultry);
- certification will be easier for small farmers thanks to a new system of group certification;
- there will be a more uniform approach to reducing the risk of accidental contamination from pesticides;
- exemptions for production in demarcated beds in greenhouses will be phased out.

EU regulation 2018/848 of 30 May 2018 on organic production and labelling of organic products

EU regulation 2020/1693 of 11 November 2020 amending regulation 2018/848 and to come into force in 2022

Action plan for organic production in the EU

In March 2021, the Commission launched an organic action plan for the European Union. The action plan sets out to achieve the European Green Deal target of 25% of agricultural land under organic farming by 2030.

The plan comprises of 23 actions divided across three axes:

- Axis 1: stimulate demand and ensure consumer trust
- Axis 2: stimulate conversion and reinforce the entire value chain
- Axis 3: organics leading by example: improve the contribution of organic farming to environmental sustainability

Organic action plan 2014-20

The 2014-20 action plan on organics set out to help EU organic farmers, distributers and retailers through a number of specific recommendations to make EU organics policy more effective.

The Food for Europe podcast

The new organic regulation provides for the adoption of numerous delegated acts and implementing measures to specify the technical **The new Regulation** is in the former spirit, but the main changes are:

- Details of production rules,
- Introduction of group of operators in the EU,
- (Physical) inspection of operators every 2 years under certain conditions,
- In third countries (outside EU), transition from the current equivalency recognition to compliance recognition.

For the above reasons, accreditations granted to control bodies for control of Organic Production shall be updated. After discussions with the Directorate-General for Agriculture and Rural Development of the European Commission (DG AGRI), the EA Certification Committee (CC) Working Group (WG) Food

proposes to the EA Certification Committee to harmonize as follows the transition of accreditation:

- Transition on national level
  Before the 1st of January 2021, each National Accreditation Body (NAB) shall contact its National Competent Authority to define the assessments of accreditation performed before updating accreditation certificate and the date to refuse application for the Regulation (EC) No. 834/2007.

- Transition between Equivalency and Compliance approach
  If a Certification Body accredited for OP in third countries for the recognition on equivalency (relating to Regulation (EC) No. 1235/2008), it can apply a transfer of its accreditation to be recognised in purpose of compliance. In this case, the NAB shall perform a document review, and at least one on-site assessment before granting accreditation for compliance. Witnessing is not mandatory for transitioning.
  Any accreditation granted for the current equivalency approach shall be upheld until the end of the legal transition period of the new regulation (see below).

- Expiration of equivalency recognition
  The recognition of equivalency will expire on 31st of December 2023. Specific provisions will be discussed to harmonize practices between NABs during this period.

The European Commission has announced the **postponement** of the entry into force of the **new European organic regulation** for one year, until January 2022.

It is not a final decision as this proposal must also be approved by the Council and Parliament, although it is expected that this postponement is accepted without submitting further amendments. Furthermore, the Commission has communicated

that the next EU Green Action Plan is open for public consultation (open until November 27th).

This announcement is welcomed by the European organic food and agriculture movement, represented by IFOAM Organics Europe.

standards linked, for example, to organic production standards, group certification or the organic control system.

Despite the intense work of the Commission and the Member States, from the European ecological movement they point out that many of these technical requirements still have to be debated and adopted by the Member States, leaving in the best of cases, only a few weeks for organic operators to adapt to the new standards and for organic certifiers to be accredited according to these new rules.

The European Green Deal: A vision to climate neutrality for the EU by 2050

The European Green Deal (EGD, European Commission 2019c) is a new growth strategy unveiled by the European Commission in December 2019. The European Green Deal, one of the priorities of the Von der Leyen Commission (2019-2024), aims for Europe to be the first climate-neutral continent by becoming a modern, resource- efficient economy. Specifically, the EGD aims "to transform the EU into a fair and prosperous society, with a modern, resource-efficient and competitive economy where there are no net emissions of greenhouse gases in 2050 and where economic growth is decoupled from resource use". Moreover, the EGD stresses that "the EU has the collective ability to transform its economy and society to put it on a more sustainable path".

Overview of the Farm to Fork (F2F) strategy

The F2F strategy, at the heart of the European Green Deal, "addresses comprehensively the challenges of sustainable food systems and recognises the inextricable links between healthy people, healthy societies and a healthy planet".
The F2F strategy is composed of a main communication and an annex, the latter serving as an action plan for the strategy. The strategy recognises that food systems are responsible for approximately 29 percent of the world's greenhouse gas (GHG) emissions and that nearly 70 percent of all agricultural GHG emissions come from the animal sector. It explicitly states that "there is an urgent need to reduce dependency on pesticides and antimicrobials, reduce the use of fertilisers, increase organic farming, improve animal welfare, and reverse biodiversity loss". The F2F is meant to lead a global transition towards competitive sustainability from farm to fork.

The goals of the F2F strategy are to:

- − Ensure that food production, transport, distribution, marketing, and consumption have a neutral or positive environmental impact,
- − Preserve and restore the land and sea-based resources,

- − Mitigate climate change,
- − Reverse the loss of biodiversity,
- − Ensure food security, nutrition, and public health.
  Notably, the F2F strategy is not legally binding, which means that adequate policies must support initiatives and targets contained therein. In the following section is an overview of how this would work for initiatives that directly impact organic. For the sake of succinctness, only those initiatives that directly impact organic are considered in this publication. Still, many more initiatives are included in the F2F strategy than only the ones hereafter.

Farm to Fork strategy & organic

Organic farming has a prominent place in the Farm to Fork strategy. Perhaps the most significant achievement for the organic sector is the recognition that organic can be part of the solution in addressing the environmental challenges we currently face, as the F2F strategy includes a target which aims at achieving at least 25 percent of the EU's agricultural land under organic farming by 2030 and a significant increase in organic aquaculture. This 25 percent target will not be reached with a business as usual approach, or with only a few favourable policies here and there. To reach the 25 percent target, comprehensive policy support for organic is needed across the EU, aiming to increase the supply and demand for organic products.

At the heart of the organizations' strategies - their testimonies

A survey was carried out among 14 organizations and associations of producer organizations from Austria, Belgium, Spain, France, Italy and the Czech Republic, to collect their testimony as actors on the ground

The aim of the organizations of fruit and vegetable producers is to organize the marketing of the products of their members and are therefore in direct contact with the demand of local, national and international markets.
More than 40 years ago, they were among the first to perceive the growing societal demand for safe, healthy fruits and vegetable that respect organic balances.

At the beginning of the 1980s, anxious to preserve the quality of their working tools, soil, water, air, their immediate environment, a certain number of groups of fruit and vegetable producers in groups of producers, groups of local and regional technical extension have embarked on "integrated pest management" (reasonable management of plant protection), supervised by avant-garde technicians.
From 1990, it is all the factors of production, including soil, irrigation water and the impact on the quality of the resource, the air, which is taken into account through the «Integrated production '...
The practice of Integrated Production is rapidly gaining ground to represent in the 2000s more than 50% of European production

Several Member States and many Regions have framed these steps within a regulatory framework. AREFLH in 2013 took stock of these procedures and regulations.
In 1990, the first producer organizations created an "organic" department in their product / service offering in order to meet an emerging demand from their customers and a growing number of consumers.
Later in the years 2005/2010, other collective initiatives emerged with "Eco-responsible orchards", the "Zero residue" collective, etc.

These approaches were born from the realization that sustainability and quality are the future of the fruit and vegetable sector.
They answer:
- To the demands of European producers and customers and societal expectations,
- The need to Promote environmentally friendly practices, ensure the sustainability of production techniques, enhance the image of French products and producers, be a dynamic engine of permanent progress by relying on research, experimentation and innovation
- If necessary to ensure better protection of the health and well-being of producers, better respect for biodiversity, better use of water and soil resources (Agenda 2030)

- Respond to customer and consumer requests; Organic makes it possible to diversify buyers and create added value (Organic 20% not more than 25%);
- Provide full service to customers' volume, quality, safety, range and schedule,
- Constantly looking for new product lines (product offer
- obtain a better valuation for producer
- willingness to comply with Rale, Nale, European regulations the integrated and organic production sector which is more and more important in the group strategy (reduce environmental impact, chemical treatments, health guarantee. (65% in PI and 15% in organic) for certain productions PI represents the totality of organic and IGP production and certification. Production technique, quality and sustainability, varietal renovation,
- The integrated and organic production sector, which is more and more important in the group strategy (reducing environmental impact, chemical treatments, health guarantee. (65% in PI and 15% in organic) for certain productions PI represents all of the production and certification organic and IGP.
- Collective dynamic need for the sector and pooling of technical and communication resources
- highlighting interest of the origin

The AOP testimonies

- Rougeline Bio (France): meet the demand of producers and customers (Carrefour) and societal expectations, this is a third way, it allows us to promote the know-how of integrated pest management
- Pomévasion (France) : Respond to the customer and consumer requests; the organic offer makes it possible to diversify buyers and create added value; eco-responsible orchards are a necessity for collective industry dynamics and for the pooling of technical and communication resources; development interest from France origin
- Coop Latour (France) started out with the conviction of certain members and management team to satisfy a market waiting for organic stone fruits
- Association Nationale Pommes Poires (France): Our objective: to promote environmentally friendly practices, to ensure the sustainability of production techniques, to enhance the image of French products and producers, to drive a dynamic of permanent progress based on research, experimentation and innovation

- UNICA group (Spain) awareness that sustainability and quality are the future of the sector; provide full service to customers (volume, quality, safety, range and schedule), constant search for new lines; obtain a better valuation for producer by differentiation
- Fruit du Ponent (Spain) contribute to better protection of the health and well-being of producers, better respect for biodiversity, better use of water and soil resources (Agenda 2030)
- Coop Frudeca (Spain): Expansion of markets and customers beyond conventional
- APOT (Italy): willingness to respect Regional, National, European regulations, promote quality and sustainability production techniques, and varietal innovation,
- VIVA group (Italy): the integrated and organic production sector which is more and more important in the group strategy (reducing environmental impact, chemical treatments, health guarantee. (65% in PI and 15% in organic) for certain productions Integrated Production represents the whole of production and organic and IGP certifications. Bio via Almaverde Bio exclusively 100% natural (without pesticides, fertilizers and chemical conservation)
- FINAF

The great environmental, social and economic challenges that the Italian and European agricultural sector are facing require a reflection on the one hand on the new production paradigms and on the other on the role that this same sector can have in the environmental protection strategy and with it, in the ability to create new markets and increase the competitiveness of farms. The commitment to an increasingly sustainable agriculture becomes fundamental both in the face of the needs of consumers, who are increasingly informed and attentive to environmental issues, and because in the face of increasingly extreme climatic criticalities, the implementation of practices becomes strategic sustainable to prevent risks and find effective and rapid remedies that protect producers from the enormous threats deriving from climate change.

For over 30 years, the PO members of the AOP FINAF have been using agronomic practices in the area capable of reconciling one of the most intensely productive agriculture in Europe with the protection of the environment and the health of consumers.

From a first start in the 80s with integrated pest management, aimed at excluding treatments with a strong environmental impact, in the 90s we moved to Integrated Production: a set of technical standards and operating methodologies, applied in synergy, to reduce and rationalize the use of chemical means, ensuring at the same time the obtaining of products of high quality and safe profitability. Integrated production is carried out

through specific Regulations prepared by the Regions (EC Reg. 1257/99). In the countryside, the technicians support the producers in the application of integrated pest management techniques, with the use of low environmental impact practices to further improve the quality characteristics of the products. Scrupulous and systematic checks in the subsequent stages of selection, packaging and distribution ensure a quality product and total traceability of production, that is, the exact knowledge of each stage of its journey, from field to table.

With regard to the activities of the POs adhering to FINAF, with regard to the main activities related to the development of organic farming, as well as other sustainable practices, some of the main stages are mentioned:

Widespread presence of agronomist technicians with monitoring of farms along the entire supply chain;

- Application of the Organic Production Manual which regulates all phases of the product from production to packaging, up to shipment;
- Creation of a specific branch for fresh organic products;
- Implementation of specific projects on organic tomatoes both through network contracts and through the RDP;
- As regards the processed product, conserve Italia, a branch of most of the POs that have always been members of FINAF attentive to the sustainability of its productions, for years it has drawn up a sustainability report every 3 years, and in addition to

having the main environmental certifications (EMAS ISO 14000: 2004, Missing Trading)

4

Conserve Italia has adopted a corporate management in a circular perspective, through the evaluation of the cycle of life of its products (in English LCA or Life Cycle Assessment);

- As far as investments are concerned, all POs apply the Integrated Production regulations and develop environmental actions, including: sexual confusion, the application of biological control, the use of biodegradable mulching sheets, as well as investments such as: the purchase of precision machines, the acquisition of purifiers for the reuse of water, of plants for the development of renewable energies or weather stations for water saving.

- VBT (Belgium Flanders): meet increasing market demand
- Austria: the country has 25% of its surface area organic and the market continues to grow
- EB fruit (Check Republic): meet the expectations of the domestic market and more economical driving style
- CZ fruits: (Check Republic) meet market demand

Many standards are implemented by producers' organizations, whether of public origin (European, national and regional standards) or private (international

organizations, distributors) and professional, ZRP (zero pesticide residues).
Without real harmonization between them, the burden incumbent on producer organizations, and therefore on producers, is very heavy, both in terms of compliance with procedures and in terms of the financial burden

-European standards**,** regulation 834/2007 organic production, EMAS ("Eco Management and Audit Scheme"), EU Emissions Trading System
- National standards: ex: Bio Suisse, HVE, HACCP, Bio Austria, Ama Biosiegel, JalNaturlich, Ursprung, AmaGap, Naturland
- Regional standards**:** junta Andalucia, IP standards of Catalonia, Trentino quality
- International or national certifications**:**
- Global Gap, GRASP, BRC food, IFS food, Naturland, Demeter, IFA, Food Safety, Food standard,
- Country protocols**:** eg; China, Tawain
- ISO22000, ISO14000 / 2004, FSSC22000, SISPO

- AB eco-responsible orchards, Variety club specifications, French producer quality charter based on OILB
- Private certification: many distribution chains

Numerous and precise internal and external control systems:

+ Internal controls

- Crop sheets (treatment register), residue analyzes, periodic monitoring of orchards by the PO technician (e.g. 18 eco-responsible orchard control points), Zero pesticide residue charter, packing houses controls (32 control points control), traceability controls and hygiene standards.

+ External controls by independent private companies: customer certifications, Regions Agriculture Department (Integrated Production Disciplinary),

+ European regulations, AB, Global gap, regulatory advice and Agriculture Department controls, European standards, Global Gap, ISO, Organics ...

Distinctive Brand Policies

For the most part, PDOs develop a distinctive brand policy for their eco-responsible or organic production, whether for their own entity (individual brand or private client brand) or as part of a collective approach. Some examples:

- Henriette Joly (France) and Select Fruits (export) (Pomévasion)
- Collective brands:
- - ANPP Brand eco-responsible orchards carried by members, collective communication (media, social networks, outlets, events, open-door orchards - 49% notoriety
- - Melinda and Melinda Bio Brand, and DOP della Val di Non (Golden, Canada, red Delicious) (APOT)
- Catalonia's official integrated production logo

Corporate brand

- Organic production under customer brands (Unica Group)
- Own brand Cat I, Cofrudeca and Bouquet Bio or customer brand if requested (Coop Frudeca)

- Almaverde bio and Sollarelli for customer/consumer communication, (Grupo VIVA)

The Regions support and encourage durable strategies of producers

PACA

The Region supports the annual programs of the Regional Chamber of Agriculture and the AGRIBIO network which provides support for conversion projects in order to allow the technical, economic and social success of farmers' projects and overall stability of the sectors (follow-up of producers, technical days, experimentation, and promotional action).

Three main project leaders

- Bio de Provence and the Departmental Organic Agriculture Groups (AGRIBIO-

Regional Chamber of Agriculture and Departmental Chambers of Agriculture-

Organic Agriculture Research Group: (fruit and vegetable research expert and AB technical referent).

Other actors are also involved in this topic within less specific programs.

European support can support, for 5 years, farmers who commit to practicing organic farming (Conversion to Organic Farming or Maintenance to Organic Farming). State and Rhône-Méditerranée-Corse Water Agency credits have been targeted for this system, which covers the entire territory. The overall EAFRD envelope of € 21 million is in high demand due to the continued strong increase in conversions in the regions.

BIO-High Environmental Value:
In 2020, the Region encouraged the (national) development of High Environmental Value (HVE) certification by creating a collective certification support system: environmental certification is a system resulting from the Grenelle de l'Environnement and supervised by the authorities public. It contributes to the promotion of the agroecological approach; Apart from the Organic Agriculture certification, few steps made it possible to promote the virtuous practices of farmers to consumers.
The Region has supported these virtuous and difficult-to-implement initiatives by supporting collective activities. The regional call for proposals encourages professional structures to pool the resources devoted to this mission. In this context, 8 collective structures will be supported in order to certify 1,500 regional farms over the next 3 years.

Bretagne

Brittany has 964 farms producing organic vegetables in 2.019. The areas certified and in conversion amount to 6,730 hectares (+ 16% / 2018), or nearly 20% of the national areas (1st place in terms of production) national fresh organic vegetables). 628 Breton farms produce organic fruit for 1,614 ha.

To make Brittany a leading region in eating well, the Region is supporting the development of agricultural practices towards agriculture that is more respectful of the environment, through a set of targeted aid.

Managing authority of the European Agricultural Fund for Rural Development (EAFRD), the Brittany Region mobilizes regional aid financed by this fund to support organic farms through several measures:

• Measures to maintain organic farming (MAB). Over the 2015-2018 period, these maintenance measures supported more than 1,300 farms, for an amount of € 17.71 million.

• Conversion to organic farming (CAB) measures. At the same time, they supported organic conversions through € 32.8 million in support for nearly 1,000 farms over the same period.

More than 900 “Pass bio” diagnostics aimed at developing organic farming by supporting the installation, conversion or transmission of farms opting for organic systems were also supported between 2011 and 2020. These diagnostics, carried out by the intervention of an authorized agricultural service provider, support farmers towards sustainable practices.

Promotion of “eating well” in high schools and raising awareness among students of food education (taste, nutrition, health, etc.): support in defining an establishment project mobilizing educational and management teams, catering teams as well as as students, in partnership with academic authorities. Proposal for a 100% vegetarian meal in Breton high schools. Raising awareness among catering teams and students about the fight against food waste. First tested on 14 sites, these actions will be generalized in 2020-2021 in the 115 Breton public high schools

Auvergne Rhône Alpes

Before 2017: Organic plans for the Auvergne region and the Rhône-Alpes region. Support focused on the various partners of the organic sector

Since 2017: Organic plan for the Region: Axis 1: Support businesses and investment projects: advice on conversation in organic farming => € 832,825 / year across all sectors. Support focused on a portage of the Regional Chamber of Agriculture.

Grand Est

It provides the following supports:

- AB certification assistance
- AB conversion help

Increase in the regional aid rate for productive investments made within the framework of certified organic production
Increase in the regional aid rate for plantations of apple varieties resistant to scab in order to reduce the use of phytosanitary products

Catalunya

Starting in 2008, a specific Action Plan was established to promote the production and consumption of organic products. From 2008 to the present, 3 programming periods have been developed. In addition to these plans, there have been specific aid for organic farmers within the rural development programs, as well as aid to encourage the entry of new producers into organic production.
With regard to Integrated Production, one of the attributions of the CICC (Consell Català de la Producció Integrada) by law is the promotion of integrated production. The purpose of the promotion is to make consumers aware of the benefits of certified products through this quality system.
The CCPI has carried out different actions over the last few years, from inclusions in magazines, television and radio spots, to participation in the most important fairs in the sector such as Fruit Attraction and Fruit Logística. However, the main action that it has been developing in the last decade is direct promotion in supermarkets, where the product is found. At the

commercial surfaces, hostesses are distributed so that they explain to the consumer the benefits of buying products identified with the ladybug.

A new country project is currently being developed: Sustainable Agricultural Production (PAS)
It is a new production model, voluntary and certifiable, which aims to increase the sustainability of agricultural holdings, a model that aims to take certified productions a step further and which aims to go beyond current integrated production. This model aims to be an integrative model where, encompassing organic production (integrating aspects that community regulations do not contemplate, such as the social part, the energy part and adaptation to climate change)
.
The Sustainable Agricultural Production of Catalonia arises as a result of the reflection of which productive model should be promoted in our farms, in order to find a balance between production and competitiveness and the conservation of resources and the environment. Agriculture, as an economic activity, totally depends on natural resources (water, soil, air, etc.) and, therefore, is the main one interested in their conservation.
Water, land, nutrients and other natural resources must be used effectively at a rate of replacement that allows their

conservation, it is necessary to manage the biodiversity associated with agricultural operations and it is necessary to minimize the impact that agriculture has on their environment, so that the damage is as low as possible (in this sense, the Farm to Fork strategy highlights the potential of food systems to reverse the trend in the effects of climate change and environmental degradation.

From the PAS, they want to promote sustainable

.

In order to define the agricultural practices that will sustain this productive system, our Department, together with the Institute for Agrifood Research and Technology (IRTA), is working on the definition of these practices.

The PAS is an opportunity for the agricultural sector, so that Catalan farms are more sustainable every day, making farmers aware that they do a very important job of conserving resources and the natural environment. This, in turn, can be transferred to society so that it can value the role of farmers in caring for the natural environment and people's health

Sustainable agricultural production makes an effort to integrate all the policies of the European Union, in relation to resources, so that the practices to be promoted are in line with them.

With this production system it is intended, above all, a change of mentality in the agricultural sector, where producers understand that the implementation of certain sustainable

agricultural practices entail clear environmental benefits and that this extra effort they can make, in relation to the obtaining healthy and safe food, produced without damaging resources or the natural environment, can be compensated and recognized by society.

Sustainable agricultural production wants to reach the maximum number of Catalan farms, classifying them according to their degree of sustainability at level C (all farms that meet legal management requirements and good agricultural and environmental conditions (BCAM), at level B (sustainable farms, which carry out data monitoring) and at level a (which will be a few farms that achieve environmental excellence, where the environmental benefits of the practices carried out can be demonstrated). This classification will make it possible to value the sustainably produced food, being able to influence positively in a greater demand for these products that come from more sustainable farms and, therefore, a recognition by the distribution.

Valencia

The policies of the Region in the last 10 years, in particular with regard to the evolution of the conversion of certain

horticultural productions towards organic farming, integrated production or other sustainable practices?

Until 2016, the main policies aimed at converting to organic farming and integrated production were those included in the different Rural Development Plans financed with the EAFRD through its Measure 11 (organic farming), the promotion and research developed since the Valencian Institute of Agricultural Research (IVIA), especially in the biological fight of plagues and the aid destined to defray the ATRIAS, covering the expenses of qualified technicians that direct the actions against the plagues of each crop, as well as aid for the acquisition of phytosanitary products that can contribute an innovation and improvement in the application of the techniques of the integrated fight.

Since 2016, the I Valencian Plan for Organic Production 2016-2020 was launched, which plans all public action aimed at converting our production towards organic production. The objectives, lines and actions can be seen in the Plan itself at the following link:

http://www.agroambient.gva.es/documents/163228750/163232590/I+PLA+VALENCI%C3%80%20DE+PRODUCCI%C3%93%20ECOL%C3%92GICA.pdf/96c71dcb-3b4a-4687-a039-81de15d1b6db

Andalucia

The continuous boom in organic production and domestic demand for this type of product. As well as the growing demand of the sector to plan this action and the commitment to organic farming as a tool for the fight against climate change.

Promotion of the introduction of biological control in protected crops in integrated production through economic incentives
Promotion of Integrated Production Clusters through economic incentives

Agri-environmental aid
II Plan Andaluz de Agricultura Ecologica 2007-2013
https://juntadeandalucia.es/export/drupaljda/libro_plan_ae.pdf
III Plan Andaluz de la Producción Ecológica Horizonte 2020
https://juntadeandalucia.es/export/drupaljda/III_PAPE_DEFINITIVO_.pdf

The strategic choices have led the Region towards this evolution.
Regulations for integrated production of the main crops of our autonomous community have been drawn up, so that most of the producers have the possibility of making integrated production.
On the other hand, it is a requirement in different agri-environmental aids to make integrated or ecological production, accompanying this production system with other practices that are also beneficial for the environment.

Emilie Romagna

The policies of the Region of the last 10 years, in particular, in the evolution of the conversion of certain fruit and vegetable productions towards organic farming, integrated production, or other sustainable practices

Over the last 10 years, the Region has continued its policy of supporting the application of organic and integrated agriculture and other sustainable practices (eg renaturalization, increase in organic matter in the land, etc.). These policies began in the mid-1980s and have always been maintained and improved

The interventions implemented starting from research and experimentation (continued in the current programming with the GOI of Measure 16 of the PSR) and the verification of technical assistance interventions financed at 50%; they were then supported with the training of farmers and then with direct payments starting from the 90s (Reg 2078) and then with the environmental strategy of the fruit and vegetable CMO; in the current RDP (and also with the fruit and vegetable CMO) organic and integrated agriculture enjoy, in addition to direct aid to the surface, also a transversal priority on all training / information interventions; aid for certification, business and supply chain investments, as well as on Measure 16.

The possibility was then given for integrated productions to benefit from the regional Controlled Quality mark (LR 28/99) also from the National Quality System of Integrated Production SQNPI (Sustainable Production) mark of the MIPAAF (Law 4/2011 and DM 4890 / 2014)

Basilicate

What are the policies of the Region of the last 10 years, in particular, in the evolution of the conversion of certain fruit and vegetable productions towards organic farming, integrated production, or other sustainable practices?
PRS Basilicata 2014-2020 MIS 10.1.1 - Agro-Climatic-Environmental Payments - Integrated Production
PRS Basilicata Region 2014-2020 MIS 11 - Organic Agriculture

What strategic choices have led the Region towards this evolution?

As regards organic: to contribute to the reduction or exclusion of synthetic products for fertilization and to a lesser exploitation of land with consequent improvement of the quality of agricultural soils and surface waters. In addition, promoting crop

diversification with significant advantages on biodiversity and the landscape, on animal welfare, on the quality and health of agricultural products and on the containment of atmospheric emissions of pollutants from agricultural activity

What about the future?

Organic markets tomorrow?

The future growth of the organic market will depend both on the increase in surface area, on the structuring of supply chains, on the development of the introduction of organic products into distribution channels, and, of course, on the consumers themselves.

■ for a long time, the difference in growth rate between the organic market and organic production has been identified as the main obstacle to the development of the consumption of organic products. Between 2007 and 2017, the global organic market tripled, while areas cultivated organically have doubled. Even if in recent years, the organic production is growing more quickly than before, there are still areas where it grows less quickly than the market, as for example in the United States. Experts expect the market to grow further over the next few years. Of course, the growth rate will continue to be dependent

on the progress of organic surfaces. Shortages of certain categories of products are expected to arise in several areas. The growth in surface area is strongly linked to the public policies that will be put in place over the next few years. Moreover, according to Ecovia Intelligence, the increase in surface area has concerned more meadows than crops.

■ The development of certain markets will be linked to the structuring of sectors and the creation of processing tools. Many countries export raw organic products to import processed ones. In addition, some products are not available organically although they are locally produced in conventional.

“In terms of sales channels for organic products, according to Ecovia Intelligence, supermarkets have become the main distribution channel for organic products in most markets. The situation seems, in fact, a little more nuanced because direct sales carry a lot of weight in countries where organic consumption is still limited. It is mainly in Europe and North America that mass distribution has a very important weight. In recent years, the brands have strongly developed their ranges, in particular under private labels. In the United States, the organic supermarket brand Kroger, represented around € 1.8 billion in sales in 2018. The development of the organic offer in supermarkets (particularly in hard discount for Europe) has contributed to the democratization of organic products.

Specialized distribution is increasingly suffering from competition from generalist distribution. To continue to develop, it will have to innovate more and more.

Some common trends too many markets

The supply of organic products in mass distribution is growing and the market share of mass distribution is often on the rise.

- Health appears to be one of the main reasons for purchasing organic products in many countries.
- Young people, in particular Generation Y, consume more organic products than their elders.
- Online food shopping is growing.
- Local origin is a very important selection criterion that often takes precedence over organic.
- More and more consumers are becoming vegetarians or vegans1. There has been an increase in the number of people opting for a vegan diet for environmental reasons.
- Consumers do not seem to be sufficiently informed about organic products in a large number of countries.

And the Post-2020 CAP?

In the context of the post-2020 CAP, the Eco-scheme is a new tool proposed for direct aid to support voluntary farmers in initiatives favorable to the protection of the

environment through incentive or financial compensation.
The challenge is to succeed in supporting the dynamics of agroecological transition of farms. The balanced combination of maintaining agro-ecological practices and systems on the first pillar within the framework of voluntary programs (payment for environmental services provided by biological, grassland, autonomous, diversified systems, etc.) and support for the transition to the second pillar (Conversion to organic farming "CAB" and evolution of systems including MAEC) would constitute a real lever. The integration of the environmental dimension into the agricultural production model is an economic asset making it possible to strengthen resilience, gain in competitiveness and increase the income of farmers. Maintenance aid for farms which have already made a transition should fall under annual eco-schemes and multiannual aid for agroecological transition should retain its place in rural development.

To promote the development of a strong and more sustainable production of fruit and vegetables, it would be necessary to support a regulation at European level

with sustainability guidelines such as greater promotion of biodiversity, reduction in the use of phytosanitary products, promotion of alternative methods to the chemical fight, greater use of organic fertilizers, etc, a regulation of a voluntary but certified nature and with high control, including multi-residue analytics and other aspects that increase the demands of other private protocols, in order to provide greater added value to the producer.
A regulation that is strict in the field of agricultural sustainability, but that allows its specific adaptation in each region given the different conditions of each one. In short, a European regulation would add value and security to a sustainable production.

A recognition and regulation of integrated production must be made at the European level, this can be a real boost in the face of the growth of this production system. It is important that certain common agricultural practices in organic production are regularized, such as: use of local cultivation varieties, self-production of biofertilizers on farms or mobile installations for transformation into farms (slaughterhouses, oil mills, etc.

Climate change has strong consequences on fruit and vegetables productions which are totally dependent of

the weather. Climate change is one factor driving the spread of pests and diseases, along with increasing global trade. Climate change can affect the population size, survival rate and geographical distribution of pests; and the intensity, development and geographical distribution of diseases.

Temperature and rainfall are the big drivers of shifts in how and where pests and diseases spread, according to experts.

“In general, an increase in temperature and precipitation levels favours the growth and distribution of most pest species by providing a warm and humid environment and providing necessary moisture for their growth’’,

The plant protection products available for the producers were drastically reduced in the last ten years by the European regulations. The sector is waiting for a strong and permanent research policy to find new eco-friendly substances economical compatibles.

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What challenges and what development prospects for the producers?

- A real expectation of consumers and customers for healthy and virtuous agriculture,

- Constantly growing demand which brings real added value to the product
- An enrichment of the range of customers
- A niche in the market with a big price difference with conventional products
- The increase in the world population and the consumption of LF makes the fruit and vegetable sector a promising niche with a future

What opportunities?

The convenience sector is in high demand (ready-to-use products) which is driving sales of processed products;
Organic production is perceived as an added value by the consumer. But it is becoming more democratic year after year through mass distribution channels. In this context, how to maintain this valuation? ;
It represents a real opportunity to create new product lines, reach new consumers

These productions offer the possibility of enhancing the production of the territories, preserving the soil, limiting water erosion, keeping organic matter, biodiversity, new product lines, new consumers
The increase in organic production is linked to its healthy character; there is greater consumer acceptance of defects in

shape, size, color as this is associated with "natural" methods of production.

The consumer demands a range of ecological and non-GMO products.
But innovation is essential for the future of the sector in order to enable it to offer products with higher added value and a wider range justifying a higher price; There is greater consumer acceptance of defects in shape, size and color because they are associated with natural production methods

European, national and regional public institutions actively support the development of organic production and local circuits

What threats?

In times of economic recession some consumers turn away from organic products; the consumer confuses sustainability, proximity, natural and healthy;
The use of pesticides causes consumer mistrust.
Also current price differences accentuate social inequalities

An excess of supply risks leading to a fall in prices, and a commoditization of the product

It takes a long time to create a new variety and the demand is constantly evolving

Small farms encounter difficulties in moving towards innovation,

The European market is subject to strong competition from imports from third countries, making it difficult to value higher costs.

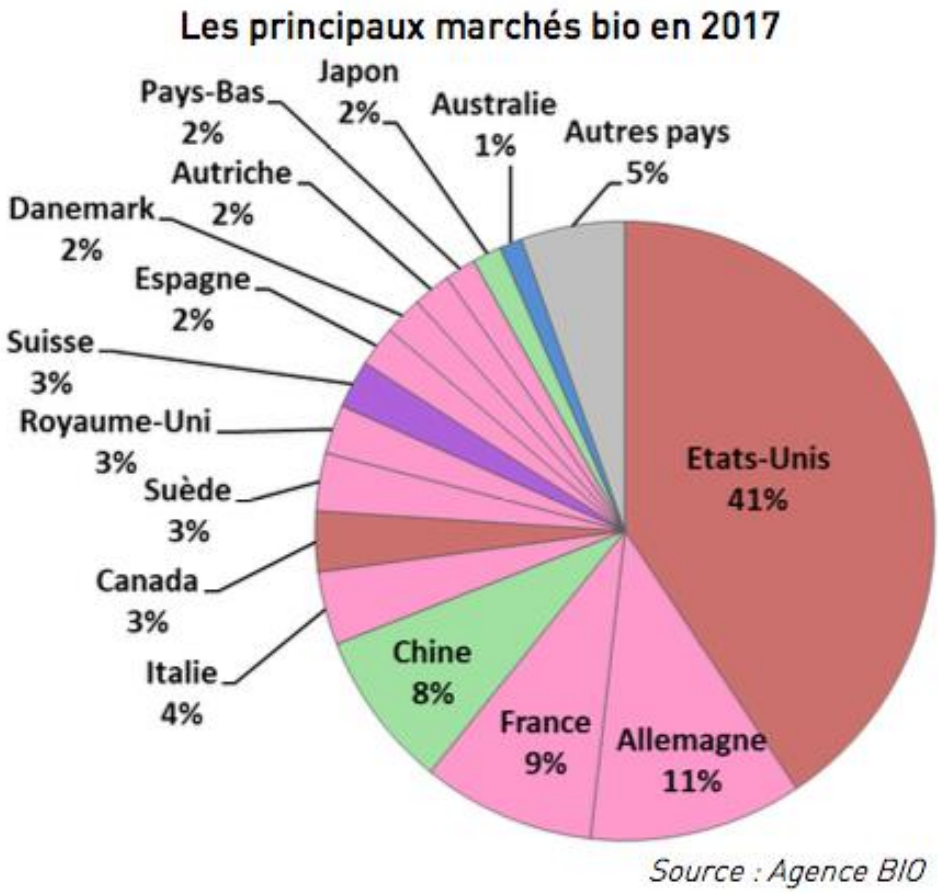
What weaknesses?

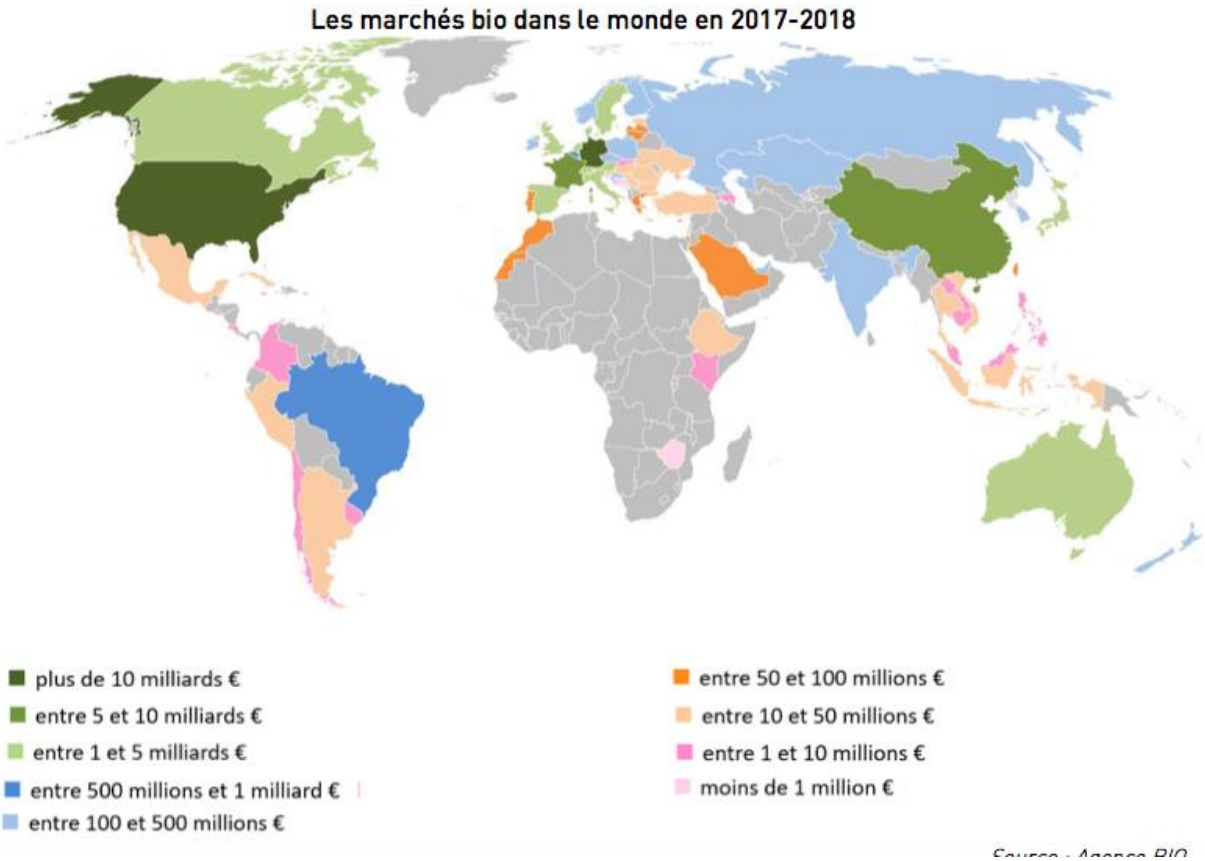
higher production costs, lower yields, lower quality, and increased disease pressure

Increasingly erratic climatic variables that impact taste, color, shelf life, limited water resources (freezes, excess heat, water stress, new diseases)

ANNEXES

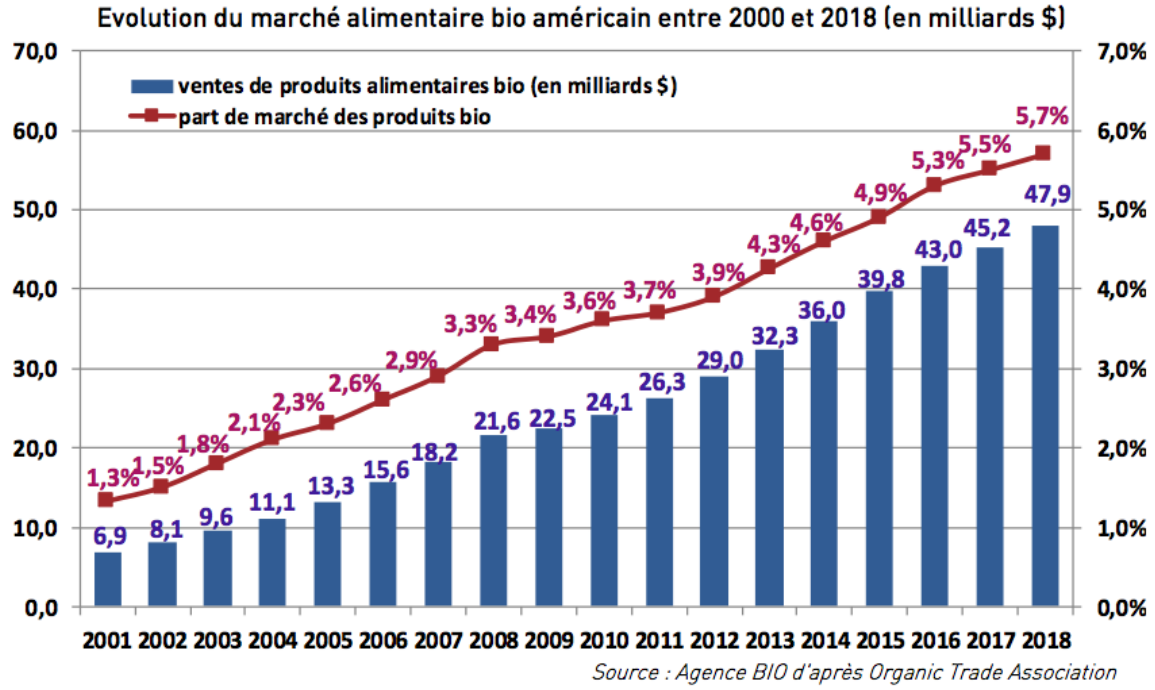
Other countries, other markets, other consumers?


Les principaux marchés bio en 2017
Japon 2%
Australie 1%
Autres pays 5%
Pays-Bas 2%
Autriche 2%
Danemark 2%
Espagne 2%
Suisse 3%
Royaume-Uni 3%
Suède 3%
Canada 3%
Italie 4%
Chine 8%
France 9%
Allemagne 11%
Etats-Unis 41%
Source : Agence BIO



The United States was in first position with 41% of the global organic market in 2017. The value of total sales of the organic sector (food and non-food) represented $ 52.5 billion in 20181, of which $ 47.9 billion was food products (€ 41.8 billion 2), an increase of 5.9% compared to 2017 (after an increase of 6.4% in 2017) 3. The United States organic market has more than doubled in eleven years. Organic products represented 5.7% of the food market in 2018. US demand for organic products is growing faster than production. In 2017, the United States experienced a shortage of organic products. The situation

improved in 2018, thanks to an increase in production and imports.



82% of households in the United States said they bought organic products at least occasionally in 2017, according to a survey published by the Organic Trade Association4. According to a study on the behavior of American households carried out in September 2017, Generation Y buys more organic products than the previous ones. Their purchases increase from year to year. According to Ecovia Intelligence and Mintel, this generation even represents more than half of the organic market in the United States. 40% of people of this generation see buying organic products as an integral part of their lifestyle.

Health and nutritional value appear to be the main reasons for purchasing organic products. A survey conducted in 2017 showed that American consumers are willing to pay more for organic food: 44% of consumers agree to pay 20% more for organic fruits and vegetables. The survey shows, however, that the price is still a major drag.

Fruits, vegetables and dairy products are the most popular organic products in the United States.

The organic market is more developed on the West Coast, particularly in California, as well as around New York City. California is also a region where organic production is developed.

Today, it is possible to find organic products in three-quarter of the categories of foodstuffs. Many conventional companies have launched organic products.

Large-scale distribution is the main channel of sale of organic products in the United States. The main retail chains all offer

organic products under dispenser brands. 75% of the productsconventional currently have a organic alternative in mass distribution,thanks in particular to organic products under private label.
Marketing of organic products another circuits are also being developed, in particular on farmers' markets2, through deliveries and via the Internet. The year 2017 was marked by the takeover of the Whole Foods3 brand, specializing in organic products, by Amazon. This is seen as a major change in the organic market. Amazon plans to expand its network of organic Whole Foods supermarkets in the United States. In 2018, online sales accounted for only 2% of retail food product sales, but this share is expected to increase significantly over the next few years. More and more organic products are introduced in commercial and collective catering. Almost three-quarters of daycares in the United States already use organic products.

The **Russian** organic market is still small but is growing rapidly. It was valued at € 160 million in 2018, a tenfold increase since

the early 2000s. 3% of Russian households regularly bought organic products in 2015. The Russian market is very dependent on imports (80% of the organic market national in 2018). According to experts, this market has great development potential. It will undoubtedly develop with the growth in production because imported organic products are very expensive due to the trade embargo2. The Organic Production Law should come into force at the start of 2020, it should help develop organic production and the market. The organic market could reach € 235 million in 2020 and € 1.5 billion by 2025. Russian consumers place more importance on healthy and sustainable products and less and less on brands. The Boston Consulting Group study of around 4,000 Russian consumers shows that almost half of them plan to spend more on products that benefit health and quality of life, such as food expenses, education and travel.

Auchan is the only brand to offer an organic section in its points of sale. In other supermarkets, organic products are placed near conventional products.

Russia is currently experiencing a phase of economic growth and the incomes of its inhabitants are increasing, which is favorable to the development of the consumption of organic products. However, there is a significant gap between the big cities and the rest of the country3. Purchases of organic products are mainly concentrated in Moscow and in St

Petersburg (80% of sales in 2018). In these two cities, specialized organic stores and restaurants offering organic products are developing. Moscow has around 20 stores with between 40 and 90% of their offer organic and Saint Petersburg 4 stores offering organic products. Russian consumers are mainly interested in fresh organic products (dairy products, meat, fruits and vegetables). It is the inhabitants aged 25 to 45 and belonging to the middle to upper classes who are the largest consumers of organic products.
The main obstacles to the development of the Russian organic market are the lack of confidence, the price and the lack of availability. According to a study by the Ecological Union in 2018, nearly 40% of Russians said they were ready to buy organic products, but 47% found it difficult to find organic products. The growth of the market will depend strongly on the evolution of the incomes of the population and the growth of supply.

In Turkey, there is no reliable assessment of the organic market. The number of points of sale offering organic products is increasing. Supermarkets are the main distribution channel for organic products in Turkey and the one with the largest organic range. This is growing, especially for processed products. Supermarkets offering organic products are located in major cities and in tourist coastal towns. The open bazaars of

Istanbul, Bursa and Izmir, which are held once a week, also constitute an important distribution channel for organic products (fresh fruits and vegetables and cereals). There are also 30 specialized organic bazaars2 where products are sold directly by farmers. Their number is growing slowly. There are few specialized organic stores with a wide range of products3. There is no organic supermarket chain yet. Online sales of organic products are growing.
According to ETO, there is a double obstacle to the development of the Turkish organic market: a lack of consumer confidence and the poverty of small farmers. Subsidies are only paid after the first year of transition and are relatively low, the cost of certification is high, small farmers cannot manage market access (in terms of range and quantity of products).

The USDA, however, estimates that the market for organic packaged products in Turkey is expected to grow by more than 10% per year between 2017 and 2022.
About 80% of Turkish organic production is exported. Turkish organic farming started with the impetus coming from Europe in the 1980s. The rest of the organic production is consumed locally but is not always marketed organically.
Organic packaged food is expensive in Turkey and is mostly purchased by educated, high-income urban consumers.

In big cities, the demand for organic products is growing. AMAPs are developing there because consumers want to have direct contact with producers. Rice is one of the main organic products sold in Turkey.

Asia: a growing organic market

■ Asian consumers are seeing their incomes increase, which gives them easier access to quality products.

The Asian organic market has experienced strong growth in recent years. It was estimated at nearly € 10.1 billion in 2017. Asian consumers are increasingly aware of ecological and food safety issues. The lack of legislation on organic products in a number of countries is, however, an obstacle to the development of consumption.

The six main markets in Asia for organic products are China, Japan, Kazakhstan, South Korea, India and the United Emirates.

■ In 2017, China was the fourth largest organic market in the world and the first in Asia. It was estimated at € 7.6 billion in 2017, but organic products still only represented a modest share of total food product sales: 1.1%. This is a market with great potential of development.

Due to food security problems in **China** and the increase in their income, people are turning more and more to organic

products. These are, considered healthy, qualitative, fashionable and modern. Consumers pay attention to food labels and are interested in news articles about health. They are also increasingly concerned about the quality of the water. Supermarkets are the main distribution channel for organic products (around 75% of the market), however specialized organic distribution and direct sales are growing. Some specialty stores are independent, while others belong to networks. Specialized organic stores are now located in all major Chinese cities. The Beijing organic market, which was established in 2010, takes place three times a week and has around 50 vendors. The sale of organic products on the Internet is growing strongly. Online food stores offer a large number of organic references. Some online stores are specialized organic. The transformation of organic products is developing to satisfy the domestic market. Consumption of organic products takes place mainly in cities. Rapid urbanization and the growth of the middle class, coupled with rising disposable incomes, have very likely had a positive influence on the Chinese organic market. The use of organic products in public catering is growing.

1- The biggest food scandal was that of the melamine found in infant milk powders and dairy products in 2008.
2- In addition, in 2017, online sales represented 60.5% of sales of fresh produce in China.

Besides food safety and health, other reasons for buying organic products are the preservation of the environment, animal welfare and taste. Chinese consumers, however, are still relatively poorly informed about organic products: around a quarter of the population is familiar with these products. The price appears to be another brake on the growth of sales of organic products, even if more and more Chinese are ready

Japan was Asia's second-largest organic market in 2017, but only ranked fourteenth globally. In 2018, He approached 1.5 billion €. It is developing relatively slowly, in particular due to the lack of availability of Japanese organic products (a market very dependent on imports because a small part of the agricultural areas dedicated to organic and there are few young organic farmers), to a distribution network of organic products still underdeveloped, consumer confusion between organic and "natural" 1 and the Japanese practice of consuming washed

and calibrated fruits and vegetables. The non-official recognition of participatory guarantee systems by the Japanese government is also an obstacle to the development of the sector. The price also seems to be a brake on the development of the Japanese organic market.

However, in 2018, more than half of the distributors offered at least some organic products. Organic products are mainly sold in supermarkets, in farmers' markets, in restaurants and on the Internet. The large supermarkets such as Aeon, Coop net and Life all have organic departments. 17 organic restaurants were identified in 2019. Tokyo and Osaka have a number of organic cafes and shops. The specialized French brand Bio C'Bon began to establish itself in Japan in 2016. According to Business France, it has been relatively successful. These stores sell fruits and vegetables, dairy products, meat, fish, coffee and tea. There are about ten other specialized independent (some of them online).

Organic products are also used in school canteens.

Processed products represented 69% of Japanese organic market in 2018.

Health and food safety are the two main reasons for buying organic products in Japan.

Japan organized its first organic festival in December 2016. It has been held every year since. There are organic producers, restaurants and crafts.

The USDA estimates that the Japanese organic market should grow little over the next few years.

According to a recent OMRP survey, 97% of Japanese people know the word organic, but only 5% correctly understand its meaning. ■ In India, the organic market amounted to € 186 million in 2017, or only 0.1% of the food market. For several years, the Indian press has been raising public awareness of the importance of consuming healthy food. Most of the offer is distributed in urban areas. The organic market is growing mainly thanks to the demand from city dwellers, who are more and more numerous2. Urban buyers are willing to pay higher costs for organic produce, while eleven people in rural India are less aware of the benefits of organic produce. Bangalore is the city where the consumption of organic products is the most developed. The number of organic stores is growing strongly there. Other factors favour the growth of the organic market: the sale of organic products on the Internet is growing quite rapidly,

the purchasing power of Indians is increasing and Indians are increasingly aware of the environmental and health benefits of organic products. . Generation Y youth are more interested in these products than the rest of the population. Price is the main obstacle to the development of the Indian organic market, followed by the mismatch between supply and demand.

Fruits and vegetables are the organic products most bought by Indians. Most of the food categories include organic products. The Indian organic market is expected to grow further over the next few years, in response to increased consumer awareness of the importance of food quality following food crises, coupled with increased income. According to the USDA, the Indian market for organic packaged products is expected to grow by more than 10% per year over the next few years and, according to Avalon Consulting, the Indian organic market could even exceed € 1.8 billion by this time. 2024.

■ Consumers in the Middle East are increasingly interested in organic products, especially those belonging to Generation Y because they place a great deal of importance on the consumption of healthy foods. According to experts, the Middle Eastern organic market is expected to grow by an average of 14.4% per year between 2015 and 2022 to reach around € 16.5 billion. The consumption of organic products is mainly localized in large cities.

Latin America:

A still modest organic market

A high proportion of organic production is exported. Nevertheless, a domestic market for organic products is developing in a number of countries.

Brazil

It was the largest organic market in Latin America with € 778 million in 2016. In recent years, the growth of the Brazilian organic market has slowed down due to economic and political crises. Brazilians are, however, increasingly interested in healthy and sustainable products. 55% of Brazilians recognize the national organic logo. 15% of the inhabitants of large cities regularly bought organic products in 2016. The State of Sao Paulo represents more than half of the Brazilian organic market. Two-thirds of sales of organic products are made in supermarkets, but the offer of organic products is growing in all sales channels. The Brazilian retail chain Pão de Açúcar is the main seller of organic products in Latin America. Some of the organic products it sells are under the Taeq private label. Its competitor, Carrefour Brazil, aims to double its sales of organic products by 2020. Dedicated departments are gradually being established in its stores.

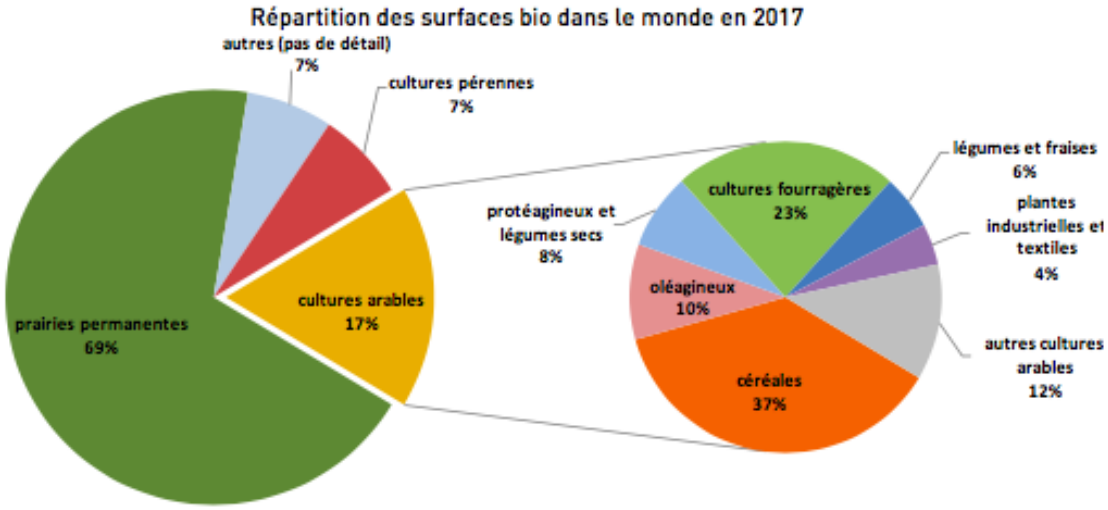
The main reasons for consuming organic products are health, environmental protection and quality. The price remains the main obstacle.

Vegetables and fruits are the most consumed organic foods in Brazil.

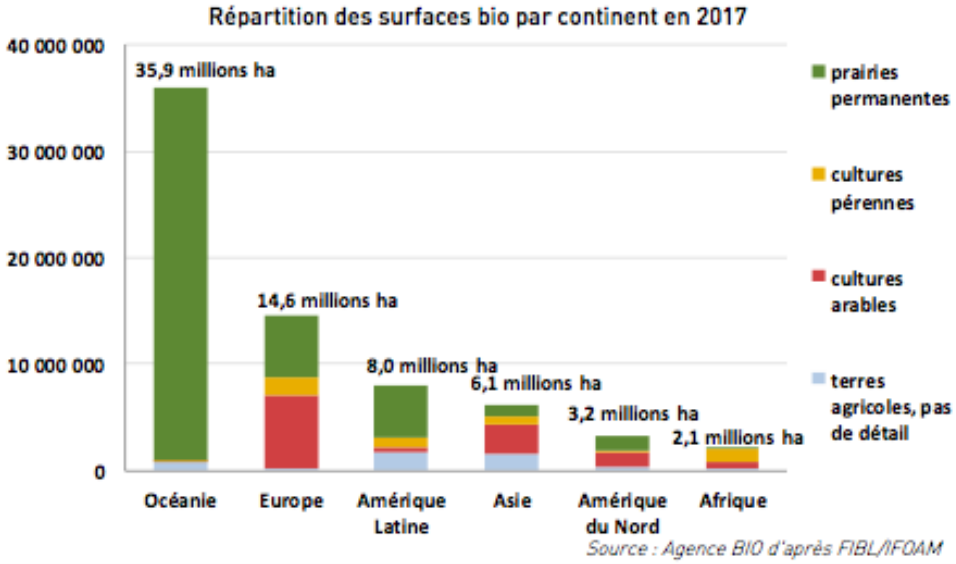
In 2009, the National Program for School Meals instituted the obligation to use 30% of the budget dedicated to public food purchases to buy products from family farms and preferably organic. At the end of 2017, 40 million students were benefiting from this program.

Focus sur les productions végétales bio

Répartition des surfaces bio mondiales : Plus des deux tiers des surfaces en prairies permanentes



Source : Agence BIO d'après FIBL/IFOAM



Source : Agence BIO d'après FIBL/IFOAM