2025 EUROPEAN ORGANIC CONGRESS

STRENGTHENING ORGANIC ROOTS FOR A COMPETITIVE AND SUSTAINABLE 2050

25-27 JUNE **WARSAW, POLAND**

#EUorganic2030 #EOC2025

Thoughts on an organic vision for 2040

Susanne Padel
Organic Policy, Business and Research Consultancy

Organic farming: a principled approach to food systems sustainability

Organic 1.0 (1920s to 1970s): Organic pioneers established the concept of organic farming and made connections between soil, food and health

Organic 2.0 (1980s to 2020s): Organic became codified and regulated in production and processing standards & certification schemes around the world.

- IFOAM Principles of Health, Ecology, Fairness and Care from 2005
- IFOAM Definition of Organic 2007

Organic 3.0 (envisioned as starting in the 2020s): Organic food and farming should become more ecologically sound, economically viable, socially just, culturally diverse and transparently accountable

IFOAM principles of Organic Agriculture

Organic agriculture should…

The Principle of Health.

sustain and enhance the **health** of soil, plant, animal, human and planet as one and indivisible

The Principle of Ecology.

be based on living **ecological** systems and cycles, work with them, emulate them and help sustain them

The Principle of Fairness.

build on relationships that ensure **fairness** with regard to the common environment and life opportunities

The Principle of Care.

be managed in a **precautionary** and responsible manner to protect the health and well-being of current and future generations and the environment

2025 EUROPEAN ORGANIC CONGRESS

The four principles and organic regulations

Regulations and standards set out what farmers and processors are permitted to do and what is prohibited/restricted

- Mainly focus on aspects that are easy to audit (e.g. input use)
- Some but limited statements of principles in standards and regulations
- Do not cover the whole food system
- Do not require a “credo” of operators

More aspirational values of the principles are not covered

- These are more difficult to audit
- These include soil health, ecological balance, agroecological system, bio-diversity, resources use, self- sufficiency, fairness, future generations, precaution and others
- They are well documented in organic literature historically

The organic guarantee

"Organic is one of the most recognized food labels and most people in developed countries consume some amount of organic food today" (Seufert et al., 2017. DOI: 10.1016/j.foodpol.2016.12.009)

- Producers agree to follow the rules and be inspected
- Consumers buy organic food mainly for personal reasons
  - fewer residues, personal health, taste, GMO free
  - some altruistic reasons

- No guarantee of purchase
- How important is trust in certification?

Scientific evidence of benefits of organic

In many areas, organic farming results in lower environmental impacts than other forms of agriculture

- Water protection
- Soil conservation
- Biodiversity
- Climate protection
- Resource use efficiency
- Animal welfare

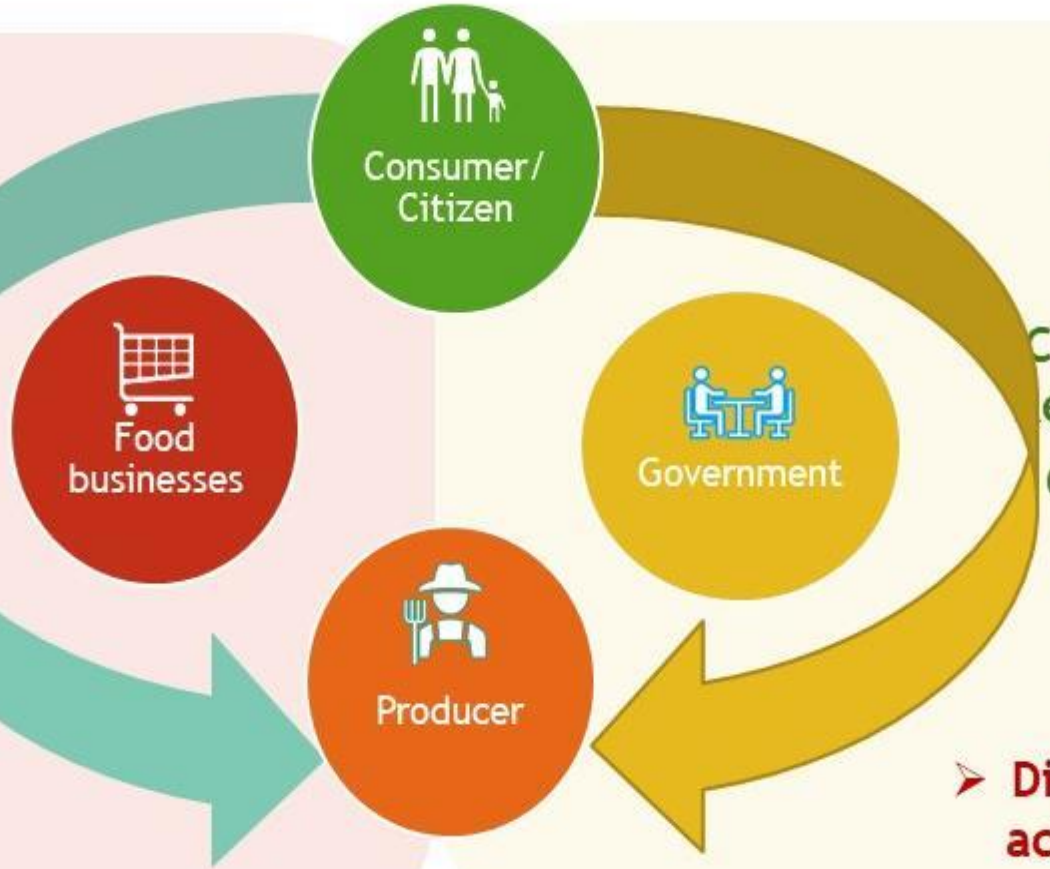
Meta-analysis of over 500 scientific publications
Sanders et al., 2025

Who should pay: the consumer or the citizen?

Consumers buy certified food
Pay a premium

(Costs along supply chain)

Producers follow standards
Get certified,
Receive better price



Public benefits:
Water protection
Soil fertility
Biodiversity
Climate adaptation
Resource efficiency
Climate protection
Animal welfare
Public health
Social wellbeing

- **Directly relevant to achieve policy goals**

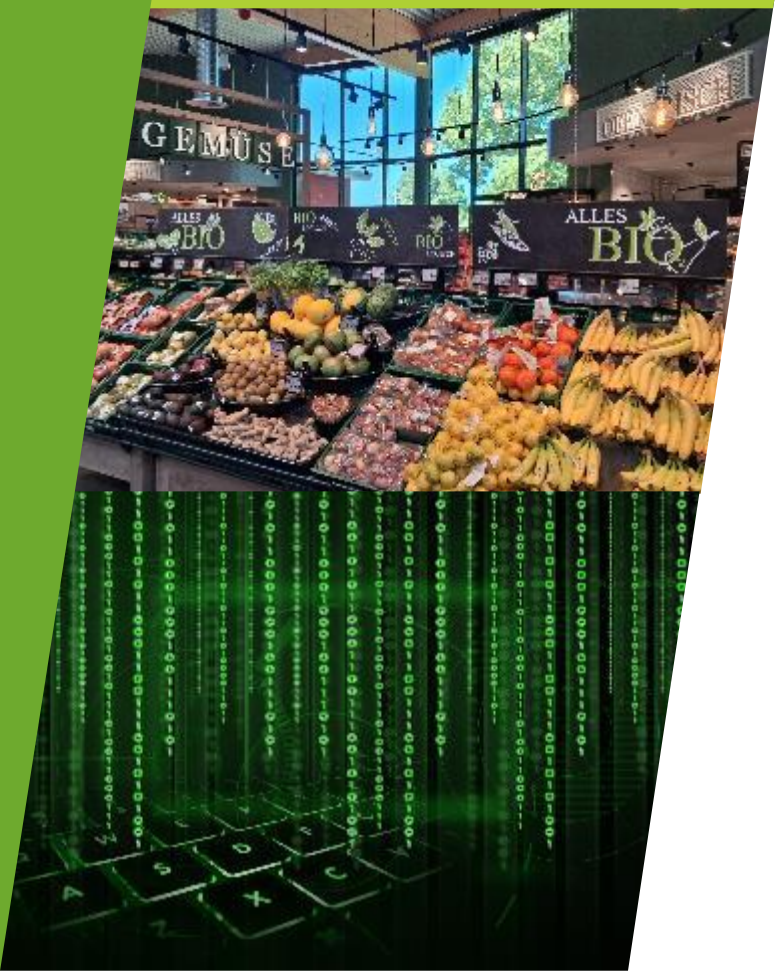
- Consumer can be expected to pay for what is directly relevant to them
- Should not the Citizens (public purse) pay for the public benefits?

Why a new vision for organic for 2040?

The political, economic and environmental context is changing

1. Reduced policy interest following farmer protests
2. Regenerative farming and agroecology are attracting attention in the farming sector and appear in the market, but remain poorly defined
3. Organic markets affected by food price inflation and post Covid return to eating out, but signs of recovery in several countries
4. Climate change is real
5. Digitalization, big data and AI are impacting on producers, supply chains and certification

What does this mean for organic? What can it contribute?



My thoughts related to

Policies & Regulation

Markets & Communication

Technology & Digitalisation

Policy & Regulation

Organic farmers contribute to the transition to more sustainable food systems and provide inspiration

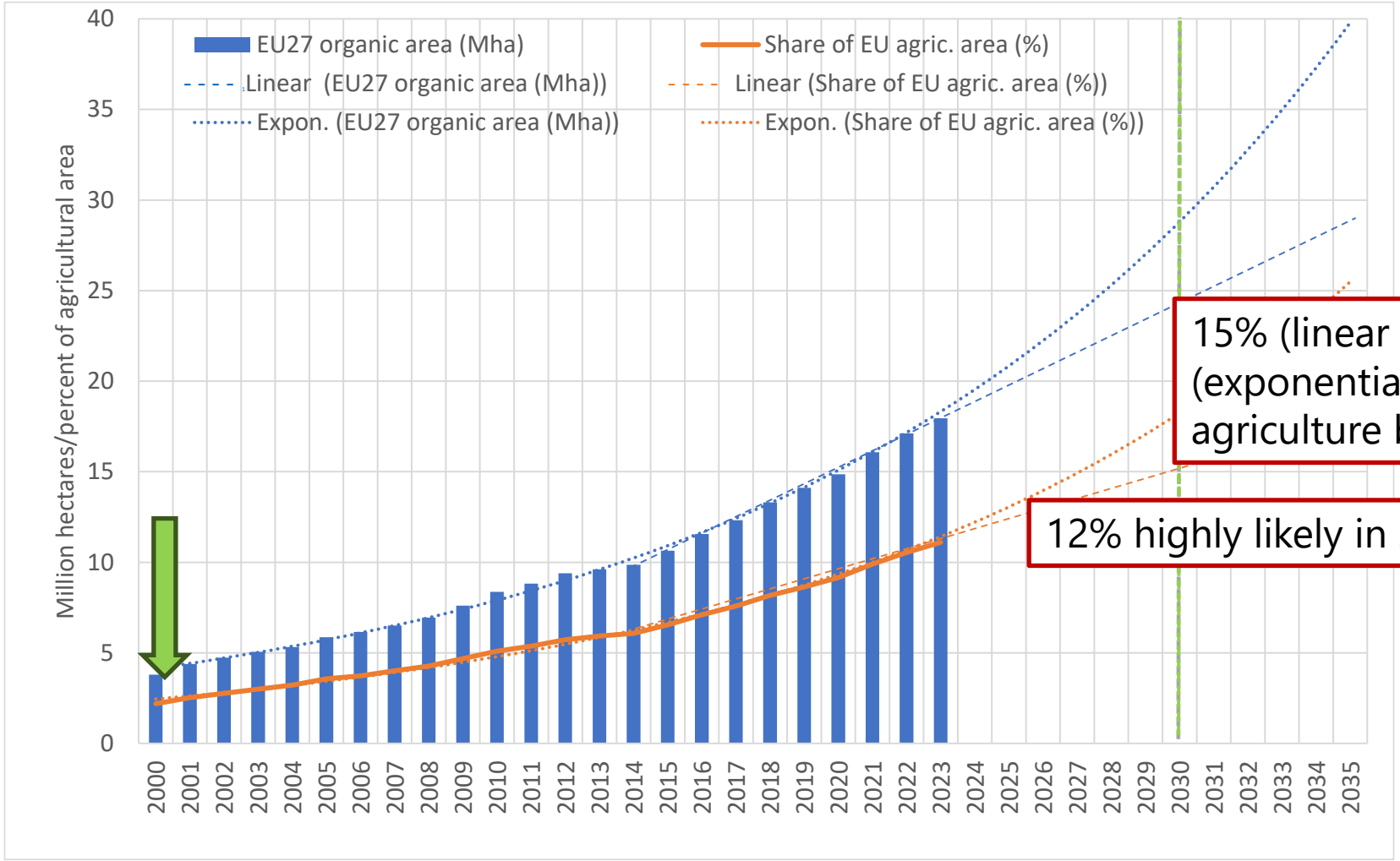
Organic is recognised in European agricultural policies

EU Organic Regulation since 1992 - Definition & inspection/certification
Area based support since 1994 - Conversion & maintenance, not on all land
Organic Action Plans since 1995 - progressive, now in EU and most MS
EU target of 25% organic farmland by 2030 - as part of Farm2Fork & Biodiversity Strategies in 2020

Continued recognition in **EU Strategic Dialogue** (September 2024) & Commissioner Hansen's **Vision for the future of European** agriculture and food policy (Jan 2025)

Growth in organic land area continues

Doubling every 10 years from 2000; 18Mha (11%) in 2023



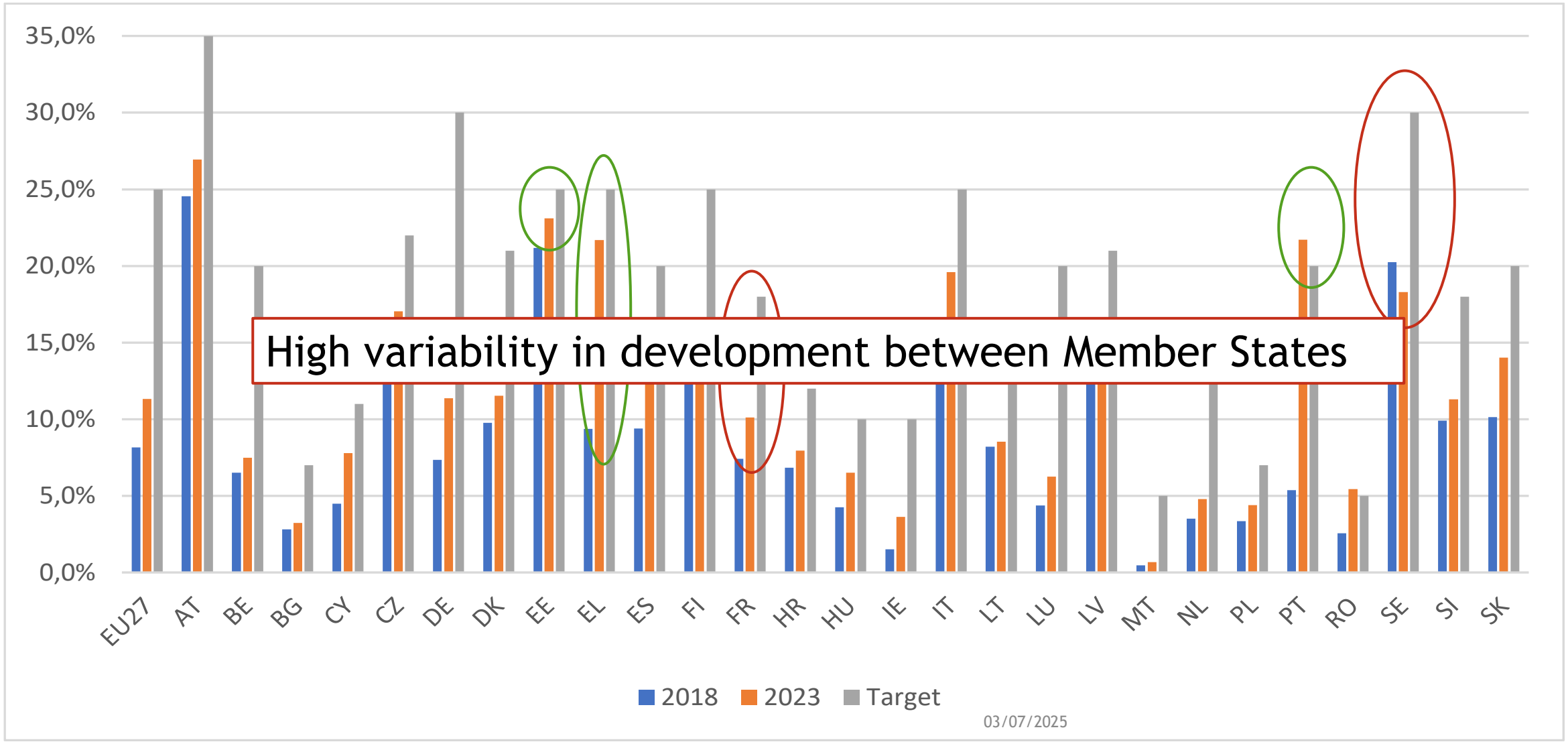
15% (linear projections) to 18% (exponential projections) of EU agriculture by 2030

12% highly likely in 2025

Source: Lampkin et al. (2025). Achieving the EU Farm-to-Fork 25% Target: How can policy support the goal. In *The World of Organic Agriculture: Statistics and emerging trends 2025* (pp. 213–219). FiBL and IFOAM.

2025 EUROPEAN ORGANIC CONGRESS

National targets (2027/30) and development trends (2018-23)



Source: Lampkin analysis based on Eurostat, FIBL Statistics and national data

And the Organic Regulation?

Evidence shows that rules also have not only direct but also indirect effects

- For example, restrictions on fertiliser and herbicides contribute to biodiversity
- Limits in livestock numbers contribute to soil and water protection

Major revisions of the European Organic Regulation in 2007 and 2018

- Ongoing discussions about simplification & reducing administration

Can we improve the direct monitoring of environmental (and social) outcomes of organic?

Can Organic continue to be playing a leading role in EU Agriculture policy in 2040?

Do we want to be mainstream?

- What compromises are we willing to accept / not accept?

Can we codify our broader values base better through more rules, or are there alternatives?

- What role will outcomes play in verification?
- What is the role of private standards compared to regulations?

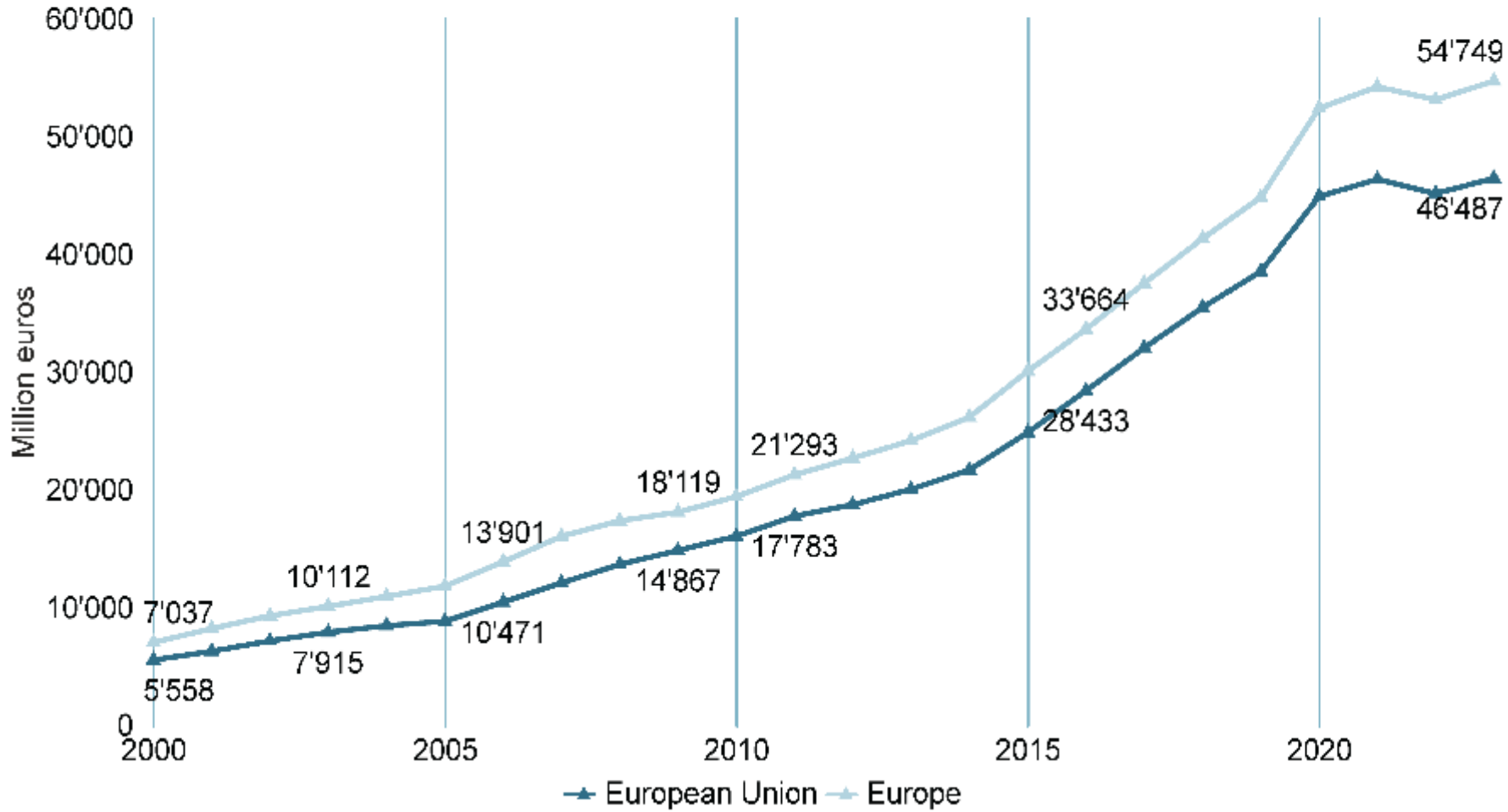
Do we need other ways to develop and debate about organic?

- Not only recognised for the clear rules but also aspirations?

Markets & Communication

Europe and the European Union: Growth of organic retail sales 2000 - 2023

Source: FiBL-AMI surveys 2001-2025



Signs of organic market recovery in some but not all countries

Germany

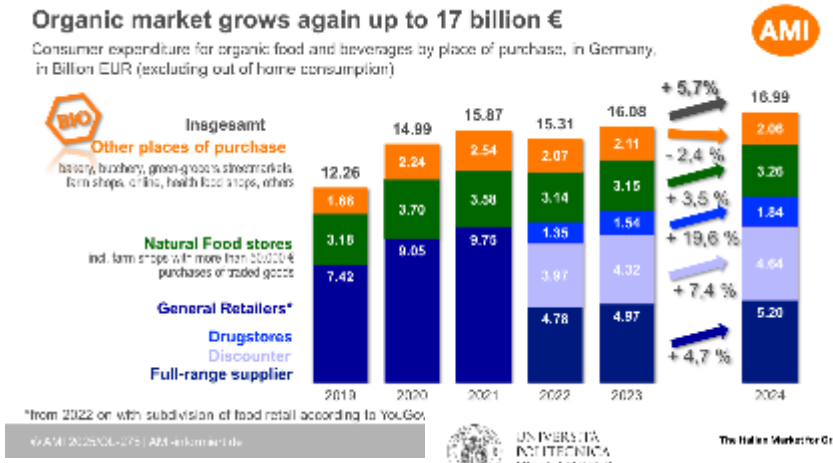
- Overall, +5.7% from 2023 to 2024
- Strong growth of retailers' own brands

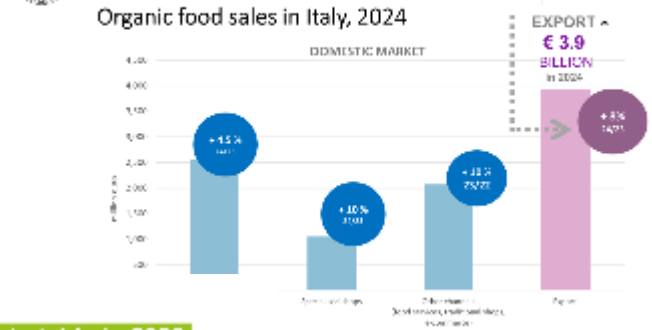
Italy

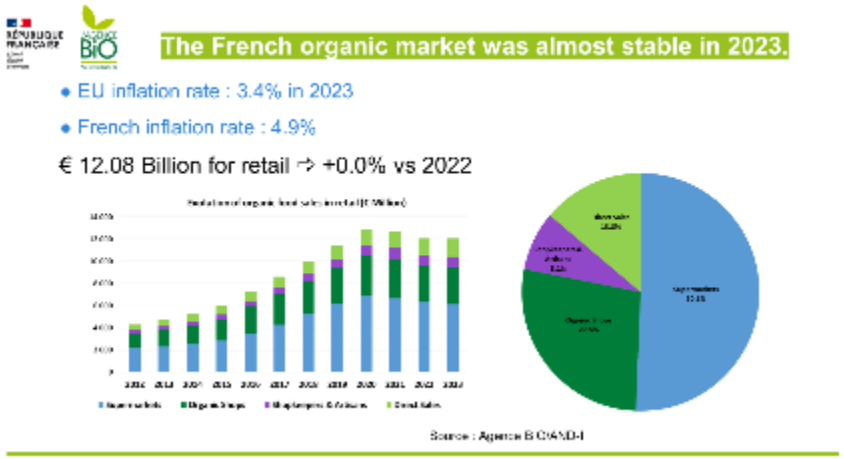
- Supermarkets +4.5%
- Exports +7%

France

- Stagnation overall
- Sales in specialist stores increased







Source: Organic Market in Europe Presentations at Biofach 2025

Not one but several organic markets

Some countries (e.g. Austria) highly focused on a few multiple retailers with >80% share, some other outlets

Others (e.g. Czechia) more reliant (>60%) on alternative outlets incl. online sales, specialist organic shops and out-of-home catering

Structures are changing
Organic markets are becoming more professional

What narrative can increase consumer trust and market share for organic?

- Do competing sustainability schemes have better arguments? (e.g., regenerative, agroecology, climate labels and eco-scores)

- Can we find “one message” for organic?
  - Or many different stories and narratives highlighting diversity of approaches and the many different benefits?
  - How to communicate the value of certification?

- Can the sector work better together?
  - And better with private businesses?

Technology & Digitalisation

European Court of Auditors (ECA) special report on organic

Recommendation:

"ensure the availability of relevant data to assess the development of organic farming and its impact on environment and climate by using existing tools and information more effectively" (p 5)

Source: ECA. (2024). *Special report 19/2024: Organic farming in the EU*. European Court of Auditors. http://www.eca.europa.eu/en/publications/sr-2024-19

Development needs in relation to data & digitalization

Data support decision-making of all stakeholders

- Market data not uniformly collected
- Lack of access to financial and market data can be a barrier to conversion and business investment

Data support policy making, fraud detection, monitoring of impact and measuring progress.

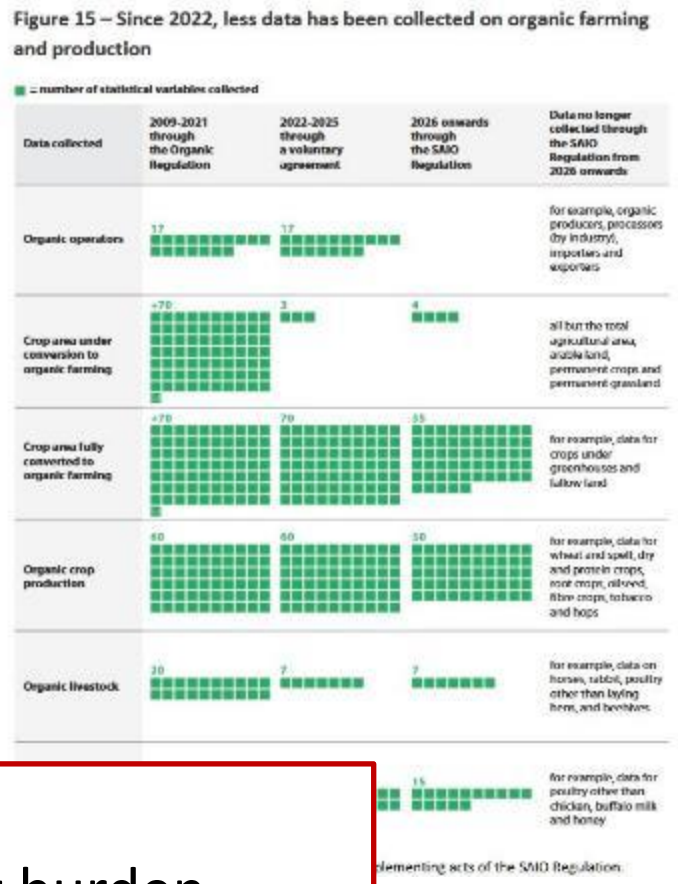


Figure 15 – Since 2022, less data has been collected on organic farming and production

= number of statistical variables collected

Data collected	2009-2021 through the Organic Regulation	2022-2025 through a voluntary agreement	2026 onwards through the SAIO Regulation	Data no longer collected through the SAIO Regulation from 2026 onwards
Organic operators	17	17		for example, organic producers, processors (by industry), importers and exporters
Crop area under conversion to organic farming	>70	3	4	all but the total agricultural area, arable land, permanent crops and permanent grassland
Crop area fully converted to organic farming	>70	70	55	for example, data for crops under greenhouses and fallow land
Organic crop production	60	60	50	for example, data for wheat and spelt, dry and protein crops, root crops, oilseed, fibre crops, tobacco and hops
Organic livestock	20	7	7	for example, data on horses, rabbit, poultry other than laying hens, and beehives
			15	for example, data for poultry other than chicken, buffalo milk and honey

lementing acts of the SAIO Regulation

We need better and more data
We need smart but reliable ways to collect data without adding burden

Earth Observation and AI potential for organic
For example, German Project EOekoLand

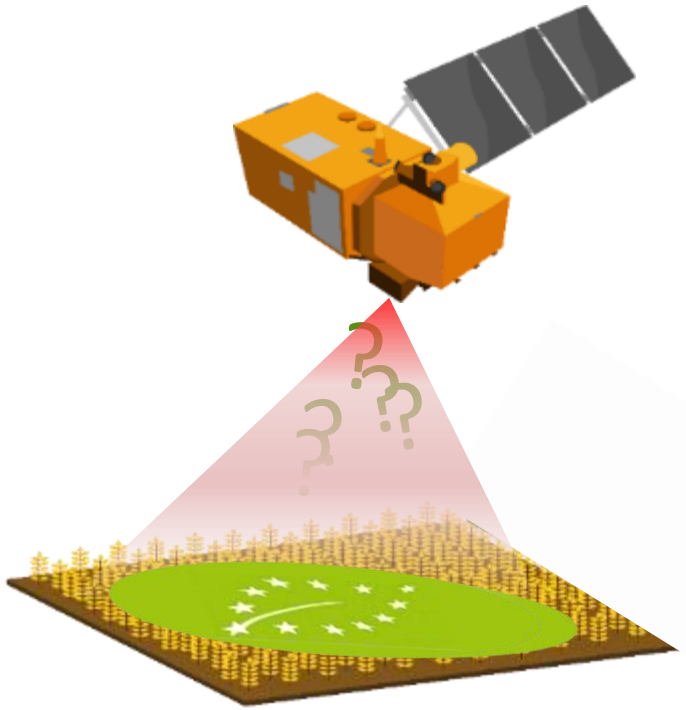
Both require access to very good reference data

- Access to IACS or certification data with geo-referencing
- Several years data about field sizes, crop sequence and other field structural data to train models

- The diversity of settings across Europe (field size, cropping, soils, climate, vegetation) is very challenging

Differentiation between organic/conventional seems partially possible

- Main crops easier than minor ones
- Varies by crops, e.g., organic and extensive grassland “look” very similar



https://www.thuenen.de/en/institutes/farm-economics/projects/erdbeobachtung-und-kuenstliche-intelligenz-fuer-das-monitoring-im-oekologischen-landbau

THÜNEN

2025 EUROPEAN ORGANIC CONGRESS

How to measure farm environmental output or impact?

Robust, with very limited additional burden, stands up in court

Topic	Output	Offical (IACS) data	Organic or similar control system	More complex calculations using IACS and farm data	Field samples
Soil	Compaction				VESS
	Organic matter	Share of legume leys		Organic Matter Balance	Soil organic matter content
	Contaminants (heavy metals)		No contaminant sources		
Water	Eutrophication	Livestock density		N/P Balance	
	Contaminants (PPP, Nitrates)		No synth. PPP No synth. N	Pesticide Load Index	Autumn Nmin
	Emissions	Livestock density	No synth. N	GHG-Emissions NH_3-Emissions	

Doing organic data better

Advantages of digitalization of certification data

- ☺ More data in a timely manner
- ☺ Geo-referencing of production
- ☺ Fraud prevention: tracing origin (e.g. mass balance system) along the supply chain
- ☺ Safeguarding the credibility of "organic

Barriers to data sharing

- ☹ Data ownership and data protection
- ☹ Lack of organic identifiers in statistical data
- ☹ Lack of unified definitions and nomenclature for organic
- ☹ Requirements of some data quality standards

Digitalization technologies offer many promises

Earth observation and AI:

- Both need a lot of reference data to be trained
- Detection of “organic area” not yet fully proven
- Combination with other records (IACS, certification)

Blockchain:

- Good examples of how it can support certification are still lacking

Much is still under development but
proven benefits more limited

Questions to consider

Policy and regulation

- Does organic want to be mainstream?
- Can we establish "*organicness*" differently – reflecting food systems and the broad values base?

Markets and communication

- What is the USP of *Organic* compared to the competition?
- What does *Organic* mean in different food systems?

Technology and Digitalisation

- What more can we do with certification data?
- What risks alongside opportunities does big data and technology offer for *Organic*?

2025 EUROPEAN ORGANIC CONGRESS

References

Organic 3.0: For Truly Sustainable Farming & Consumption | IFOAM. (2016, November 3). https://www.ifoam.bio/why-organic/organic-landmarks/organic-30-truly-sustainable

IFOAM 2005: Principles of organic agriculture.

Seufert, V., Ramankutty, N., & Mayerhofer, T. (2017). What is this thing called organic? – How organic farming is codified in regulations. Food Policy, 68, 10–20. https://doi.org/10.1016/j.foodpol.2016.12.009

Sanders, J., Brinkmann, J., Chmelikova, L., Ebertseder, F., Freibauer, A., Gottwald, F., Haub, A., Hauschild, M., Hoppe, J., Hülsbergen, K.-J., Jung, R., Kusche, D., Levin, K., March, S., Schmidtke, K., Stein-Bachinger, K., Treu, H., Weckenbrock, P., Wiesinger, K., … Heß, J. (2025). Benefits of organic agriculture for environment and animal welfare in temperate climates. Organic Agriculture. https://doi.org/10.1007/s13165-025-00493-w

EC Strategic Dialogue (2024) https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal/agriculture-and-green-deal/strategic-dialogue-future-eu-agriculture_en

EC Vision Agriculture and Food (2025) https://agriculture.ec.europa.eu/document/download/16558b9e-afed-4596-bf7c-16359d9979c7_en?filename=factsheet-vision-agriculture-food_en.pdf

Padel S, Zander K, Lampkin N, Sanders J. (2020). The consumer or the citizen: Who should pay for the benefits of organic farming? Organic World Congress 2020, Rennes. https://orgprints.org/id/eprint/42215/

Lampkin et al. (2025). Achieving the EU Farm-to-Fork 25% Target: How can policy support the goal. In The World of Organic Agriculture: Statistics and emerging trends 2025 (pp. 213–219). FiBL and IFOAM. https://orgprints.org/id/eprint/55039/

ECA. (2024). Special report 19/2024: Organic farming in the EU. European Court of Auditors. http://www.eca.europa.eu/en/publications/sr-2024-19

EOekoLand project of Thuenen Institute: EChttps://www.thuenen.de/en/institutes/farm-economics/projects/erdbeobachtung-und-kuenstliche-intelligenz-fuer-das-monitoring-im-oekologischen-landbau

Sanders J, Lampkin N (2023) Honorierung von Umweltleistungen unter besonderer Berücksichtigung des ökologischen Landbaus: UGÖ-Schlussbericht Teil II. Braunschweig: Thünen-Institut für Betriebswirtschaft, IV, 16 p. Main summary report. https://literatur.thuenen.de/digbib_extern/dn067271.pdf