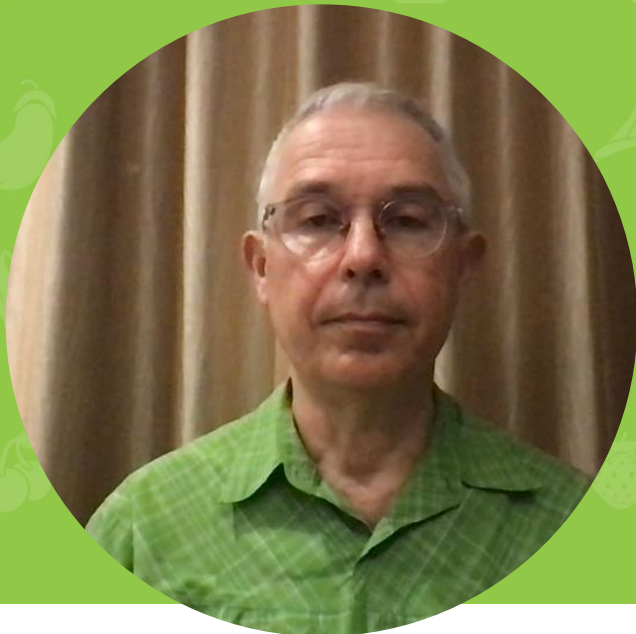


The Future of Organic Farming in Europe: Scenarios for 2040



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Why Explore Future Scenarios?

KEY DRIVERS

- The future of organic farming is **uncertain**:
 - Evolving policies & political support
 - Changing consumer preferences
 - Technological disruption
- Scenarios are useful to «windtunnel» strategies and policies, to identify opportunities and mitigate risks



Policy



Market



Technology

What Are We Really Asking?

3 uncertainties for 3 scenarios

Key drivers

1. Will the EU and national governments actively promote organic farming, or will policy favour other sustainability models?
2. Will organic be a premium niche, or will it become the mainstream food system?
3. Will digitalization strengthen organic integrity, or will it be used to introduce alternative sustainability claims?

Scenarios

1. ***Organic as the Mainstream Model***
2. ***Organic in a Fragmented Market***
3. ***Organic as a Resilient Solution in an Unstable World***



Scenario 1: Organic as the Mainstream Model

- **Vision:** Organic covers 40% of EU farmland.
- **Drivers:** Supportive EU & national policies, organic as mainstream consumer choice & gold standard, AI-powered assurance and guarantee systems and blockchain traceability enhance transparency, group certification.
- **Opportunities:** Organic as reference food & farming model, ensuring biodiversity, soil health, and climate resilience. Farmers gain access to stable funding.
- **Risks:** Dilution of standards, small farmers face challenges, consumer confusion.



Scenario 2: Organic in a Fragmented Market

- **Vision:** Organic competes with many alternative sustainability labels (e.g., “carbon-neutral”).
- **Drivers:** Hybrid policies, greenwashing, shared technologies.
- **Opportunities:** Premium niches, direct-to-consumer markets, digital transparency.
- **Risks:** Loss of market share, consumer confusion, weak political support.



Scenario 3:

Organic as a Resilient Solution to Crises in an Unstable World

- **Vision:** Organic as a resilient solution to climate and food security crises.
- **Drivers:** Global crises, food security policies, local supply chains.
- **Opportunities:** Local food systems, demand for low-input methods.
- **Risks:** High costs, competition with other labels, uneven policy support.



Comparing the Scenarios

Scenario	Organic's Position	Main Driver	Key Risk
Mainstream	Dominant (40%+ farmland)	Policy & demand	Dilution of standards
Fragmented	One of many labels	Private certifications	Consumer confusion
Resilience	Local solution	Crises & food security	Costs & instability



Strategic Questions and Conclusion

- Strategic Questions:
 - How to preserve organic's values at scale?
 - How to stand out in a fragmented market?
 - How to make organic accessible in a crisis-driven world?
- Together let's make the ladder less steep

