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Mediterranean Organic Agriculture Network

Mediterranean Organic Agriculture Network – Report 2019

Madžarić Suzana, Al Bitar Lina, Bteich Marie Reine and Pugliese Patrizia (eds.)

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MOAN
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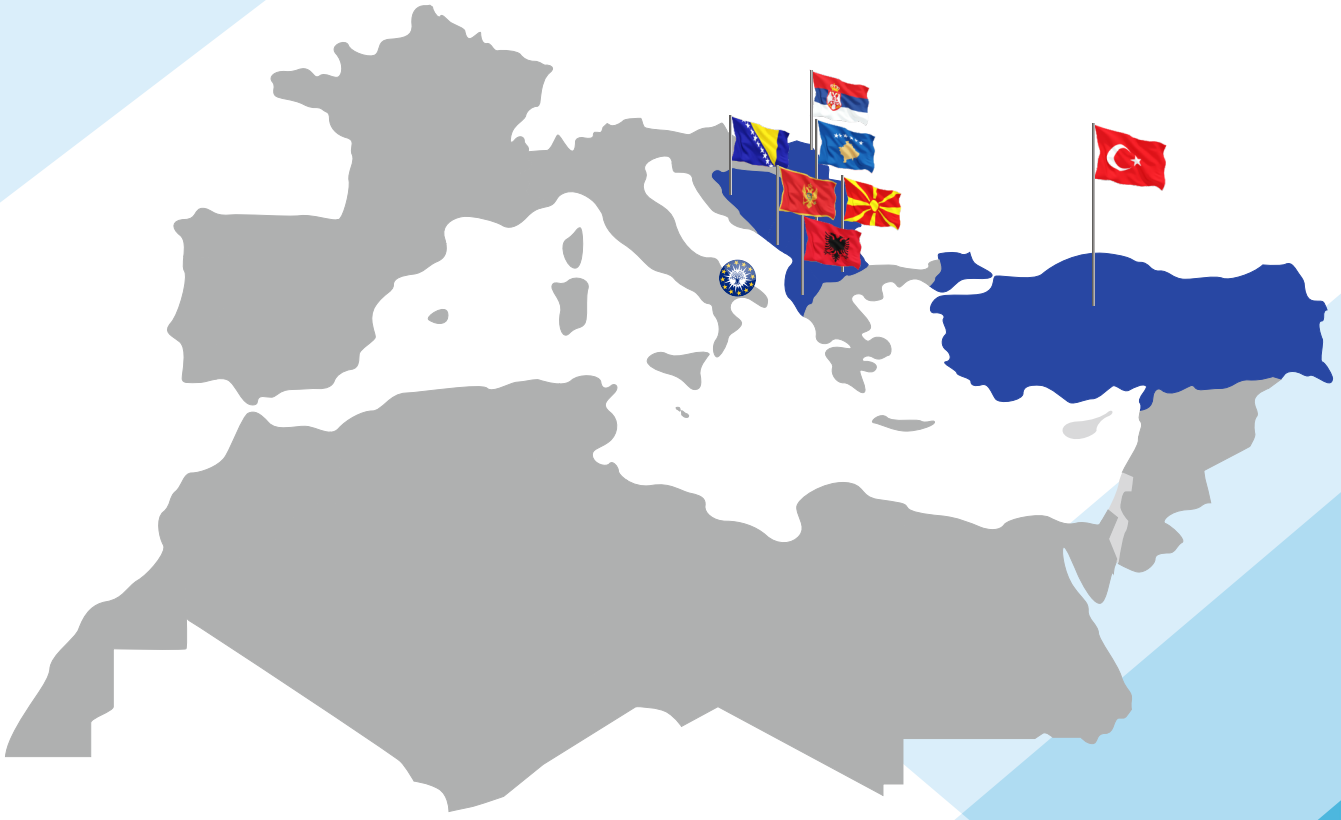
Candidates and Potential Candidates (CPC) Countries

Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia and Turkey

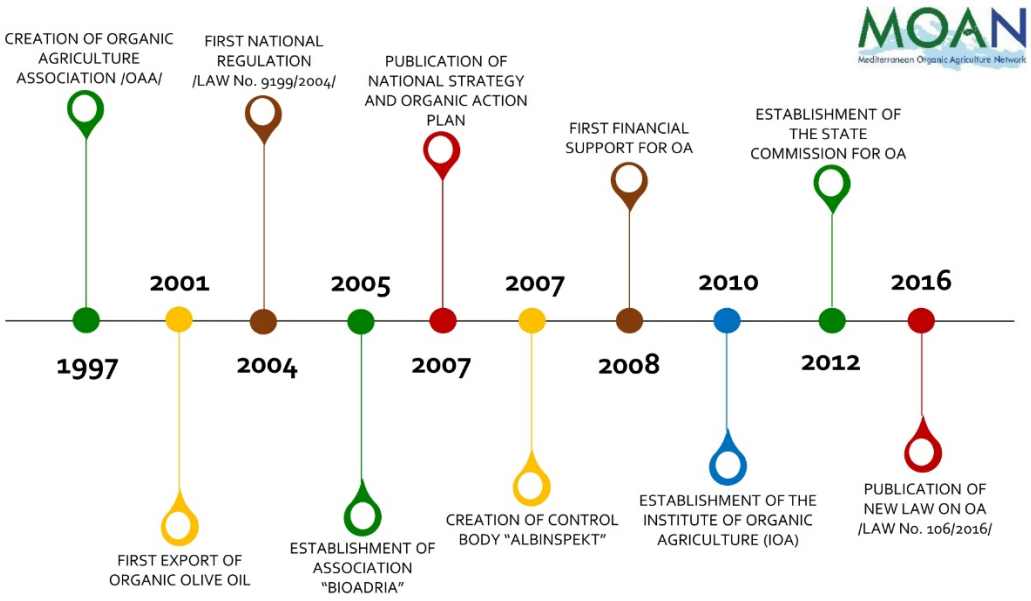


Albania
Country profile

HISTORICAL DEVELOPMENT | Albania

Rudina CAKRAJ[1]

Organic agriculture (OA) in Albania was initiated in the early 90's, with the first concrete step in 1997 when the *Organic Agricultural Association of Albania* was established. The beginning of the 21st century was marked by the first export of the organic olive oil to Switzerland. The following years were quite dynamic; the year 2004 was very important at regulatory level since the first national regulation on OA was published (infographic below).



In 2005, the association "*BioAdria*" was established, gathering different organic operators. In 2007, an important impulse to the sector growth was given by the publication of the *Strategy for Development of OA* for the period 2007-2013, including a national action plan. In the same year, the national control body "*Albinspekt*" was founded, and it is still operational. In line with the national strategy and action plan, in 2008, the first financial support in the form of subsidies was provided to organic operators.

For research and education, the year 2010 is to be remembered since the *Institute of Organic Agriculture* was established in Durrës. Two years later, the *Ministry of Agriculture and Rural Development* established the State Commission for OA as the body in charge of approval and supervision of control bodies. In the historical development of OA in Albania, a more recent milestone is the publication of a new law in 2016.

[1] Ministry of Agriculture and Rural Development. Mediterranean Organic Agriculture Network (MOAN) country representative.

MAIN SECTOR INSTITUTIONS — Albania

The Ministry of Agriculture and Rural Development (MARD) is the competent authority for OA in Albania. Within the MARD, there is no OA unit, the *Sector of Food Safety Policies* (FSP) is responsible for organic production issues. As reported above, the *State Commission for Organic Production* (SCOP) is in charge of the recognition of certification bodies and control of their activities, in cooperation with the FSP sector in the MARD. The sector responsible for OA issues is in charge of developing legislation, updating lists of organic operators in the country, registration of organic operators, and producing statistics on OA production and export, etc.

The main actor for organic certification in Albania is the sole national control body "*Albinspekt*", despite the presence of international control bodies.

Regarding research, the *Institute of Organic Agriculture* (IOA) in Durrës plays a major role, with some of the following activities: consultancy to farmers and other organic operators, sharing of research results, organization of training, plant disease forecasting, etc. Also, they are an important partner for the implementation of different projects, working in strong collaboration with different international and national institutions.

Different organic associations are present in the country, the most important being "*Association BioAdria*". In addition to farmers and farmers' groups, its members are also other operators, researchers, university professors, etc. The *Organic Agricultural Association of Albania* (OAA) stopped its activities in 2001, and its members joined "*BioAdria*" association in 2005 when it was established.

In the field of marketing, the *Albanian Association of Marketing* (AAM) is an important actor in the creation of marketing strategies, working with private and public entities.

REGULATORY FRAMEWORK AND SUPPORT POLICIES — Albania

As reported earlier, the first national legislation was published in 2004, followed by several decisions and orders issued by the Ministry. Constant efforts to improve regulatory framework resulted in the publication of the new regulation in October 2016 (Law No. 106/2016), which entered into force in the same year (Table 1).

Table 1. National legislation

Date of publication	October 10, 2016
Entry into force (year)	2016
Number	Law No. 106/2016
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	√
- **Processed Food/Feed**	√
- **Labelling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	Partially with EU regulation
Equivalent with EU	No

The law of 2016 has recently been supplemented by two sub-legal acts:

⇒ Decision of Council of Ministers, No. 336, dated 06.06.2018. "*On detailed rules for organic plant production and seaweed production*".

⇒ Ministers' Order, No.131, dated 28.3.2018 "*On list of products and substances allowed to be used in organic production*".

The new regulation covers plant, livestock, and aquaculture production rules, processed food and feed, labelling, control, and import rules. It is partially harmonized with the EU regulation (EU 834/2007 and 889/2008). The present law lays down common rules concerning: *i)* all stages of production, processing, preparation and distribution of organic products and their control; and *ii)* the use of indications referring to organic production in labeling and advertising.

Considering support policies, subsidies are continuously available for OA through direct schemes, starting from 2008. With respect to previous years, in 2017 the payment of subsidies for OA doubled. In 2018, unlike other years, support measures to farms using the organic production method included also farms in conversion (with a gradual increase in payment with the progress of conversion period).

STATISTICS — Albania

Despite dynamic historical development and continuous improvement of regulatory aspects, the sector growth cannot be seen as satisfactory, especially when considering the cultivated organic agricultural area. Organic forest and wild collection area are dominating the sector, with a total of 380 612 ha in 2017, while the cultivated land occupies a significantly smaller area (549 ha in 2017), with the cultivation of a narrow range of plant species (Table 2 and 3).

The total number of organic operators was 150 in 2017, from which 61 are producers, 53 processors and 36 exporters. Data for other operators and organic market share and value are not available.

Table 2. Key data	2017
Organic agricultural area (ha)	549
Organic share of total agricultural land (%)	0.08
Organic forest/wild collection (ha)	380 612
Organic land in conversion (ha)	66
Total No. of organic operators	150
No. producers	61
No. processors	53
No. retailers	n.a.
No. exporters	36
No. importers	n.a.
Organic market (€)	n.a.
Share of the total market (%)	n.a.

*n.a. – not available

⇒ Reported data for land in conversion (66 ha) indicate further interest in OA and are promising in relation to the growth of the cultivated area.

⇒ Due to the inconsistencies in the data collection system, 2016 statistical data in all categories presented in Table 2 were not available.

Strawberries are the main cultivated organic arable crop in Albania with a total of 43 ha followed by herbs (39 ha), while a smaller portion of land (6 ha) is employed for fresh vegetable production.

In the category of permanent crops, cultivated medicinal and aromatic plants (MAPs) are the first with 395 ha (representing almost 72 % of the total organic cultivated area), followed by olives (43 ha). Cultivation of other permanent crops was not reported. As for organic livestock production and beekeeping, data were not reported. However, among the organic operators, it is important to note that one organic aquaculture producer and one animal breeder are operational in Albania.

Another peculiarity of the Albanian OA sector is the cultivation of saffron over an area of 0.4 ha.

Table 3. Main three arable and permanent crops cultivated (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Strawberries	43	7.8
	Herbs	39	7.1
	Vegetables for fresh consumption	6	1.1
Top 3 key permanent crops	MAPs	395	71.9
	Olives	43	7.8
	n.a.	n.a.	n.a.

* n.a. – not available

MARKET AND PROMOTION — Albania

Organic production is export-oriented and among the marketing channels listed in Table 4-a; only large retail shops as supermarkets, and specialized retail shops offer organic products (all imported) in Albania. Direct on-farm selling is also one of the active marketing channels, though some products, such as olive oil, are sold with prices almost the same as for conventional olive oil. Nevertheless, the offer can still be considered as limited and coupled with the lack of demand in the local market.

Table 4. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	**TV ads**	X
Specialized retail shops	√	**Radio**	X
Health shops/pharmacies	X	**Newspapers**	√
Direct on-farm selling	√	**Leafleting/newsletter/brochures**	√
Wholesaler	X	**Public transport**	X
On-line selling	X	**Social networks**	X
		Fairs	√

Promotion is performed through newspapers, different printed materials (leafleting, brochures etc.), and participation in national and international fairs (Table 4-b). Mass media such as TV and social networks are still not sufficiently used for the promotion of OA in Albania.

IMPORT AND EXPORT — Albania

As reported in the section of historical development, the export of organic products from Albania started in 2001 with olive oil heading to Switzerland and certified by the Swiss control body "*Bio.inspecta*". Export remains the main orientation of the Albanian organic operators. At present, the Albanian exported products are besides olive oil, medicinal and aromatic plants (MAPs) and plant essential oils with Germany, Austria, France, Switzerland, USA, Bulgaria and Turkey as main destination countries.

Award-winning organic olive oil producers from Albania

Data on the import of organic products were not available, but information from some informal sources indicates the presence of importers mainly for OA inputs.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Albania

MARD is continuously collaborating and is involved, together with other local institutions and organizations, in several projects with international partners and donors. Among the most important projects for development and promotion of OA in Albania, is the ten years *Sustainable Agriculture Support* Programme (SASA project) from 2001 to 2011, implemented with FiBL Switzerland. Other two important programmes were implemented in collaboration with CIHEAM Bari: "*Integrated Projects for Proliferation and Technical Assistance in the Implementation of Organic Production Methods*" (PAB-Interreg IIIA 2004-2007) and "*Provisions for Italian Participation in the Stabilization, Reconstruction and Development Process in Balkan Area Countries*" (Bio-84/01) for the training of technical experts in OA.

The Institute of Organic Agriculture (IOA) together with the *Agricultural University of Tirana* (AUT) are the two pillars for research and education in the field of OA. Besides performing open field and laboratory studies, IOA is active in the publishing of scientific papers and offers training courses for organic producers. A number of the above-mentioned activities is performed in collaboration with different international partners and funding agencies (e.g. USAID, UNPD, COSPE, SIDA, etc.).

CHALLENGES/PRIORITIES IDENTIFIED — Albania

The establishment of an efficient control system is one of the main challenges for the OA sector in Albania in order to ensure fair competition and to fulfil consumers' requirements for high-quality food products.

Among the priorities for the sector development and growth, mention shall be made of the following: *i)* diversification of production (increase in the cultivated area); *ii)* further harmonization of the national regulation with the one of the EU; *iii)* promotion and awareness raising among local consumers, with the objective of increasing the demand and thus developing the domestic market.


Albanian organic vegetable producers

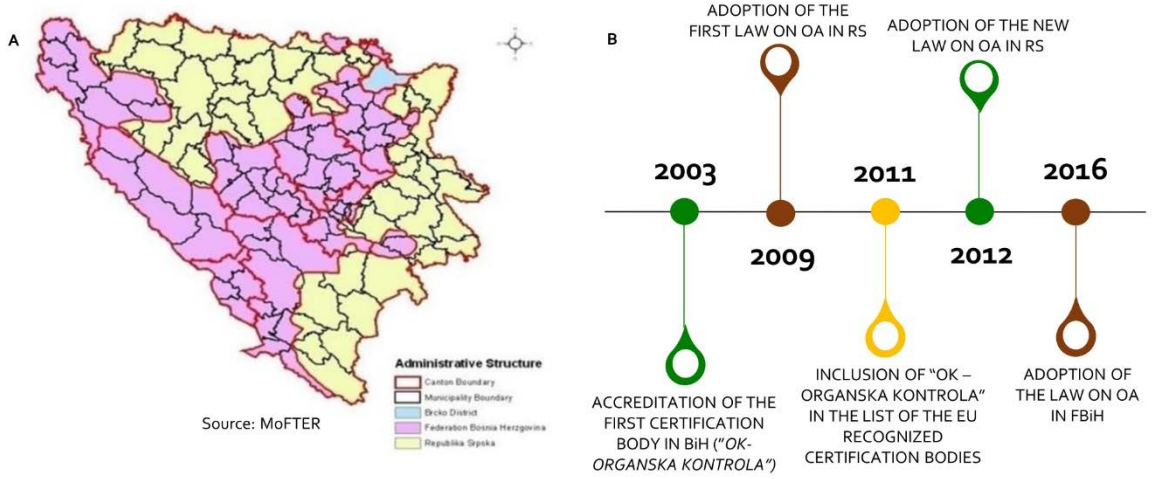
Linkography:

- @ www.bujqesia.gov.al – Ministry of Agriculture and Rural Development.
- @ www.ibb.al – Institute of Organic Agriculture.
- @ www.albinspekt.com – Certification body "*Albinspekt*".
- @ www.aam.al – Albanian Association of Marketing.

Bosnia and Herzegovina Country profile

Dušan NEŠKOVIĆ[1]

For a better understanding of the evolution of the organic sector in Bosnia and Herzegovina, it is necessary to start with a short description of the administrative structure of the country. Bosnia and Herzegovina (BiH) consists of two Entities: the Federation of Bosnia and Herzegovina (FBiH) and the Republic of Srpska (RS), and one region with special status – Brčko district (BD). Furthermore, the Entity FBiH is divided into 10 regional units or cantons (infographic below - section A). Due to this highly decentralized administrative structure, it is rather complex to describe the institutional aspects and the legal framework as most relate to one of the entities or to the canton level rather than to the country as a whole.



The organic agriculture (OA) in BiH started to gain ground in the 1990s, with the first activities related to the promotion, application of the OA methods, quality control and certification. The development process has been slow: the first certification body, "*Organska kontrola – OK*", was accredited in 2003. In 2011 it was recognised by the European Commission and included in the list of the certification bodies allowed to provide certification of organic products in third countries, intended for sale on the EU market.

In 2009, RS adopted the first law on OA and later, in 2012, adopted a new one, that was subsequently modified by several amendments. In the FBiH, the law on OA was adopted in 2016 and current initiatives are directed towards the establishment of the register for organic producers and of the logo for organic products (infographic above – section B).

[1] Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina. Mediterranean Organic Agriculture Network (MOAN) country representative.

At the level of FBiH, an association of organic producers was established in 2009 ("*Organsko FBiH*", having different regional and cantonal associations as members, whereas in RS, an organic producers' association was established in 2015.[2]

MAIN SECTOR INSTITUTIONS	Bosnia and Herzegovina

The competent authorities for OA (and all matters related to the agricultural sector) are *the Ministry of Agriculture, Forestry, and Waters* (MAFW) in RS and the *Ministry of Agriculture, Water Management and Forestry* (MAWMF) in FBiH. In the case of Brčko district, the competent authority is the *Department of Agriculture, Forestry and Water Management* (DAFWM).

At the state level, coordination is ensured by the *Sector for Agriculture, Food, Forestry, and Rural Development*, within the *Ministry of Foreign Trade and Economic Relations* (MoFTER).

Competences and their distribution between different levels of government regarding policies for agriculture and rural development are defined by the constitutions of the entities, the cantons and the Statute of the Brčko District. At the BiH level, among its assigned duties MoFTER is competent for performing activities and tasks related to defining the policy, main principles, coordination activities and for harmonizing Entity authorities' and institutions' plans at international level in the field of agriculture.

REGULATORY FRAMEWORK AND SUPPORT POLICIES	Bosnia and Herzegovina

Legislation in the area of organic production is adopted at the Entity level (Law on Organic Production "*Official Gazette Republic of Srpska*", No. 12/13; Law on Agricultural Organic Production, "*Official Gazette of the Federation of BiH*", No. 72/16). Brčko District, instead, has not enacted any regulation on OA.

Logo of the domestic certification body "*Organska kontrola*"

Organic essential oil of immortelle plants produced in BiH

OA is directly mentioned and targeted as an important sector of the plan adopted in February 2018, the *Strategic plan of rural development of BiH (2018-2021) - Framework document*, described in the sub-measure *Support to production, certification and control of organic production at all levels, in accordance with EU best practices and market requirements*.

Subsidies for OA are available in both entities FBiH, RS and Brčko district.

[2] Source: www.mvteo.gov.ba - Strategic Plan of Rural Development of BiH (2018-2021) – Framework document.

STATISTICS — Bosnia and Herzegovina

The only available indicator regarding OA in BiH is the organic agricultural area, which increased from 576 ha in 2016 to 659 ha in 2017 (Table 1). Currently, no other data are available from official sources.[3]

Some information about organic producers in BiH is available on the web page of the domestic certification body "*Organska kontrola*" (in footnote 3, point 2), which provides a list of producers certified by them. As indicated in the list, at the end of August 2018, there were 56 producers certified according to the EU regulation, with equivalence for export to EU market, and 9 producers certified only for the local market.

Table 1. Key data	2016	2017
Organic agricultural area (ha)	576	659
Organic share of total agricultural land (%)	0.02	0.03
Organic forest/wild collection (ha)	n.a.	n.a.
Organic land in conversion (ha)	n.a.	n.a.
Total No. of organic operators	n.a.	n.a.
No. producers	n.a.	n.a.
No. processors	n.a.	n.a.
No. retailers	n.a.	n.a.
No. exporters	n.a.	n.a.
No. importers	n.a.	n.a.
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

⇒ Information from web sources indicates that at the beginning of 2018 there were around 55 to 60 organic producers in FBiH, whereas in RS their number was estimated at 15 to 20.

⇒ According to the same source (footnote 3, point 1) five certification bodies are currently operational in BiH, being all accredited in accordance with the international procedures.

Organic production is quite diversified, including cereals, vegetables, berries, cultivated medicinal and aromatic plants and collection of wild herbs and mushrooms. It is interesting to note that a high percentage of producers are also processors.

Based on the information available on the web page of the MAWMF FBiH, in 2018 there were two livestock farms in the conversion period at the level of FBiH. No data are available on the livestock production in RS, nor in Brčko district.

MARKET AND PROMOTION — Bosnia and Herzegovina

Despite the lack of information related to the domestic market, it is positive that almost all marketing and promotion channels are present in the country (Table 2a, 2b). Only wholesalers are not recorded as part of the marketing channels.

Thanks to the different international agencies (*United States Agency for International Development* - USAID, *Swedish International Development Cooperation Agency* – SIDA, etc.) some of the organic producers from BiH had the chance in previous years to participate in the "*BioFach*" fair in Germany.

[3] Information provided in the rest of the section "Statistics" comes from the following internet sources: 1) www.agroklub.ba and 2) www.organskakontrola.ba.

Table 2. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	TV ads	√
Specialized retail shops	√	Radio	√
Health shops/pharmacies	√	Newspapers	√
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesalers	X	Public transport	√
Online selling	√	Social networks	√
		Fairs	√

IMPORT AND EXPORT — Bosnia and Herzegovina

Information related to the import of organic products in BiH was not available. In the case of export, its estimated value was EUR 3.5 million in 2016 and 4 million in 2017.

Main export categories were vegetables, fruits, medicinal plants, fresh, frozen and dried mushrooms and berry fruits (raspberry, blackberry, blueberry, cranberry, and strawberry).[4]

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Bosnia and Herzegovina

Among cooperation projects in BiH, an important initiative took place in 2005, in the framework of the EU CARD programme (*Community Assistance for Reconstruction, Development and Stabilization*), when the NGO LIR ("*Local Development Initiative*") conducted the project for the development of OA and the creation of a cluster for OA in the North-West of BiH. Another initiative is "*Farma II*" (2016-2020) project (phase II of "*Farma I*" (2010-2015)), supported by USAID and SIDA, and aiming at increasing the confidence of local consumers in buying BiH-produced organic food and agricultural goods, and supporting the export to the EU market, with the provision of technical assistance and training to improve the sector competitiveness and enhance the production of value-added food products.

In 2015 the "*Association for the Rural Development – ARD Banja Luka*" together with the *Centre for Economic and Rural Development* - CERD and the Association of Citizens "*Something More*" implemented the project "*Improvement of policies for organic farming and harmonization with EU standards*", funded by the *European Fund for the Balkans*.

In the field of capacity building and education, an important instrument for BiH is EU TAIEX - *Technical support/Technical Assistance and Information Exchange instrument of the European Commission*, which assists public administrations in the harmonization, application, and enforcement of EU legislation as well as to facilitate the sharing of EU best practices.

CHALLENGES/PRIORITIES IDENTIFIED — Bosnia and Herzegovina

Among the priorities for the development of OA in BiH, focus is placed on the full harmonisation of legislation with EU regulations, the development of local market, the knowledge provision and the technical support to organic producers.

One of the main challenges for the future is the data collection system for OA that is not functioning well at the level of all administrative units. To facilitate the sector growth, a context

[4] Source: www.mvteo.gov.ba – Strategic Plan of Rural Development of BiH (2018-2021) – Framework document.

analysis should be performed with detailed information and data on the current sector status to serve as the baseline data for future projects.

BiH organic producers participating in the national fair

Organic greenhouse production in BiH

Linkography:

- www.mvteo.gov.ba – Ministry of Foreign Trade and Economic Relations.
- www.fmpvs.gov.ba – Ministry of Agriculture, Water Management and Forestry of the Federation of Bosnia and Herzegovina.
- www.vladars.net – Ministry of Agriculture, Forestry and Waters of the Republic of Srpska.
- www.bdcentral.net/index.php/sr/odjeljenja-vlade-brko-dsitrikta-bih/poljoprivreda-umarstvo-i-vodoprivreda – Brčko district, Department of Agriculture, Forestry and Water Management.
- www.organskakontrola.ba – Certification body "*Organska kontrola*".

Kosovo
Country profile

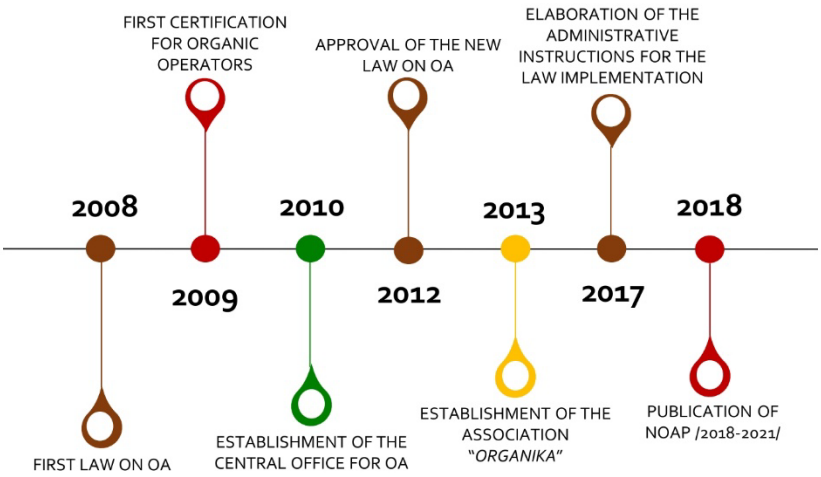
HISTORICAL DEVELOPMENT

Kosovo

Valdete AVDIU[1]

The sector of organic agriculture (OA) in Kosovo is still young and mainly focused on wild collection produces. The first initiatives towards OA started in 2002, with a different enthusiasts such as professors from the University of Prishtina. In the same year, the *Organic Association of Kosovo* (OAAK) was established.

The sector development was supported since the very beginning by various national and international funding sources.



The first law on OA was published in 2008, while the following year the first organic operators were certified for Non-Wood Forest Products (NWFP) collection and honey production. In 2010, the *Unit for Organic Farming* (central office) was established as part of the *Department for Agricultural Policies and Markets* (DAPM), within the *Ministry of Agriculture, Forestry and Rural Development* (MAFRD). The new law on OA was approved in 2012, followed by the elaboration of several administrative instructions during the period 2014-2017, for the law implementation. The second important operators' association "*Organika*" was established in 2013. In 2018, the *National Organic Action Plan* (NOAP) was published (infographic above). In the same year, the Republic of Kosovo joined *Mediterranean Organic Agriculture Network* (MOAN).

MAIN SECTOR INSTITUTIONS

Kosovo

The competent authority for the sector of OA in Kosovo is the *Ministry of Agriculture, Forestry and Rural* Development (MAFRD) and the *Unit for Organic Farming* within the *Department for*

[1] Ministry of Agriculture, Forestry and Rural Development. Mediterranean Organic Agriculture Network (MOAN) country representative.

Agricultural Policies and Markets (DAPM). In 2014, by decision of the MAFRD Secretary General, the *Commission on Organic Farming* (COF) was established as an inter-institutional body; it is currently one of the key actors of the sector. Furthermore, among the state institutions it is important to mention the *Agency for Agricultural Development* (AAD), the *Ministry of Environment and Spatial Planning* (MESP), the *Kosovo Accreditation Agency* within the *Ministry of Trade and Industry*, *Food and Veterinary Agency* as control authority, *Kosovo Forest Agency* (KFA), *Kosovo Environmental Protection Agency* (KEPA), *Kosovo Investment and Enterprise Support Agency* (KIESA) and the National Park Directorates.

Other important sector players are the associations OAAK and "Organika", the Albanian certification body "*Albinspekt*" and the Greek certification body "*Q-check P.C.*", the *Initiative for Agriculture Development of Kosovo* (IADK) and the private company "*Agroprodukt*". Among the academic institutions, we should mention the University of Prishtina with the Faculty of Agriculture and Veterinary Medicine, and the Department of Biology, within the Faculty of Mathematics and Natural Sciences.

REGULATORY FRAMEWORK AND SUPPORT POLICIES	Kosovo

Organic agriculture in Kosovo is regulated by the Law on Organic Farming No. 04/L-085 published in the Official Gazette No.28/16 in October 2012 and approved during the same year by the Kosovo Parliament (Table 1). The law is based on the EU regulations 834/2007 and 889/2008 and prepared by the working group established by the MAFRD and Italian experts, in the framework of KOSAGRI project ("*Strengthening the Kosovo Ministry of Agriculture, Forestry and Rural Development for the improvement of the vegetable production according to EU standards*").

Table 1. National legislation

Date of publication	October 16, 2012
Entry into force (year)	2012
Number	Law on Organic Farming (Law No. 04/L-085)
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	√
- **Processed Food/Feed**	√
- **Labeling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	EU regulation
Equivalent with EU	No

The Law on OA establishes objectives and principles concerning:

⇒ All stages of production, preparation and distribution of organic products and their control.

⇒ The use of indications referring to organic production in labelling and advertising.

The Law is applicable to the following products originating from organic production: unprocessed agricultural products, processed agricultural products for use as food, feed, vegetative propagating material and seeds for cultivation, and yeasts used as food and feed. It contains plant, livestock, and aquaculture production rules, processing, labeling, control and import rules.

The eight administrative instructions for the implementation of the OA law have been elaborated during the years 2014-2017 by TAIEX (*Technical Assistance and Information Exchange* - instrument of the European Commission) and KOSAGRI experts; the complete package was presented in 2017:

⇒ Administrative Instruction on Control System, Control Authority, Control Bodies and Rules on Control Application;

⇒ Administrative Instruction on Aquaculture Production;

⇒ Administrative Instruction on Livestock Production;

⇒ Administrative Instruction on Plant Production;

⇒ Administrative Instruction on Duties, Responsibilities, and Composition of the Commission on Organic Agriculture;

⇒ Administrative Instruction on Labelling and logo of organic products in the Republic of Kosovo;

⇒ Administrative Instruction on Production rules and methods for organic processed products;

⇒ Administrative Instruction on Criteria, Standards, and Conditions for imports of organic products in Kosovo.

In 2018, the National Organic Action Plan of the Republic of Kosovo 2018-2021 (NOAP) was published with the methodological support and supervision of the KOSAGRI[2] project experts (Table 2). The plan was developed based on a participatory approach, with the contribution of different stakeholders such as farmers, NGOs, private companies, academic and other experts interested in OA. In addition to NOAP, OA is also included in other strategic documents as *The Strategy and Action Plan on Biodiversity (2011-2020).*

In addition to the targets listed in Table 2, NOAP overall aims include:

⇒ Development of international cooperation and exchange of information and good practices among producers, traders, research centres, extension services.

⇒ Use of participatory and inclusive approach in the NOAP implementation and monitoring.

Table 2. Details on National Organic Action Plan

English name	National Organic Action Plan of the Republic of Kosovo
Full name in national language	Plan Veprimi Kombëtar Për Zhvillimin e Bujqësisë Organike në R. e Kosovës
Running from – to:	2018-2021
5 **key targets:**	- Increase organic agricultural area. - Promote domestic demand for organic products. - Increase export. - Educate and train different actors involved in OA.
Financial resources	State budget and other interested funding sources.

Concerning the financial support to organic operators, since 2016 MAFRD has been supporting all farmers through direct payments. The payment amount depends on the crops cultivated (i.e. arable or permanent crops), while as from 2018 support measures are also provided for the conversion period and certification costs.

STATISTICS	Kosovo

OA sector in Kosovo is mainly based on the collection of Non-Wood Forest Products (NWFP) and small area cultivated with medicinal and aromatic plants (MAPs). There are five zones certified for the organic collection of NWFP, with a total area of 373 488 ha (data for 2016) and 2 200 tons of collected products. While the area of cultivated MAPs is significantly lower, though with a constant

[2] KOSAGRI project was funded by the Italian Ministry of Foreign Affairs and International Cooperation –Italian Agency for Development Cooperation and jointly implemented by CIHEAM – Bari and Kosovo Ministry of Agriculture, Forestry and Rural Development.

increase in the last years. Indeed, in 2009, the area cultivated with organic MAPs was only 5 ha, in 2017 it reached 170 ha thus demonstrating an increased interest among agricultural producers.


Non Wood Forest Products (NWFP) as one of the pillars of OA sector in Kosovo

The collection of organic NWFP is considered to have a significant economic impact on the local communities. It is estimated that around 20 000 individual collectors are involved in the NWFP collection, 100 sub-operators, and around 10 processing companies. In 2017, collecting companies with organic certification were in total 11, again with a significant increase over time (in 2014 there was only one). At the current stage of sector development, other statistical data were not available. However, establishment of the market information service for organic products within the MAFRD is planned among the future activities.

MARKET AND PROMOTION	Kosovo

As for production, the development of the local market for organic products is slow. Only few imported products are available in the local market. While cultivation and collection of NWFP and MAPs are oriented towards external markets.

The demand for organic food is limited due to the fact that consumers are not familiar with OA, promotional activities are insufficient and have reached only a small proportion of the society. It is encouraging that one of the NOAP strategic advances is the development of the local market. If the proposed actions are implemented, it is expected that by 2021 the local consumption of organic products will be significantly higher.

Despite the fact that the domestic market is at an early stage, exported quantities have increased in the last year and this could be seen as a result of increased promotional activities at international fairs. Some examples are the participation of certified organic companies from Kosovo in "*Biofach*" and "*Anuga*" fairs (Germany). At the national level, information on promotion channels was not available.

IMPORT AND EXPORT	Kosovo

More than 90 % of the total amount of collected NWFPs is exported on a yearly basis. The main destinations are the markets of the EU member countries (Austria, Germany, Switzerland), followed by neighboring countries (Serbia, Macedonia, Montenegro).

As expected, NWFPs (wild medicinal plants, mushrooms, berries, etc.) and cultivated MAPs are the main exported organic products. Collected NWFPs are usually purchased by the collecting centers with drying facilities. The collecting centers are usually working for private companies through which packaging, labeling, market distribution, and export are performed. According to the NOAP document, the value of organic export is estimated to be around EUR 5 million per year.

The data and information about quantities and types of imported organic products were not available. However, we should keep in mind that these amounts are very small.

COOPERATION/RESEARCH PROJECTS AND EDUCATION	Kosovo

International cooperation had a significant role in OA sector development in Kosovo. Different initiatives were supported by the international donors with the objective to transfer the knowledge to organic operators, to support capacity building at the institutional level, to prepare legislative framework. One of the successful examples is the already mentioned KOSAGRI project from 2010 to 2017 and significantly contributed to generating favourable conditions to develop OA in Kosovo. Also, cooperation activities are well developed with USAID and Swiss-Caritas.

The Faculty of Agriculture and Veterinary Medicine at the University of Prishtina is the leading institution in the sector of research and education. In 2002, some of its professors were pioneers of OA in Kosovo. With time, they have developed capacities to provide education, training, information campaigns and technical assistance to organic operators and consumers in general. Also, OAAK, other associations and NGOs are active in the organization of training, demonstrative filed trials, promotional campaigns, etc.

CHALLENGES/PRIORITIES IDENTIFIED	Kosovo

Through the activities and interest expressed in the recent years, it is clear that the state institutions are strongly committed to supporting the development of OA, which is an important base for sector growth. At this stage of NOAP implementation, it is a priority to ensure the fulfilment of its objectives and to implement activities as planned. At the same time, it is necessary to monitor the implementation as a learning tool. To continue with participative approach during NOAP implementation, during 2019 special workshop is planned with the involvement of all stakeholders interested in OA progress in Kosovo.

Diversification of production is one of the challenges since the local producers and consumers are not well informed about OA. This indicates the need for projects and activities that focus on the promotion and how to spread the word about OA among the rural and urban population.

OA is not sufficiently integrated into the educational programs, while in case of research lack of allocated funds represents an important obstacle for local academic staff. In addition, it is important to establish medium- and long-term open field studies, which will enable the identification of optimal plant varieties and crop management plans adapted to the local conditions. Furthermore, the availability of large and unpolluted areas should be a stimulus for organic livestock production.

Production of honey presents important potential for development of OA in Kosovo

Linkography:

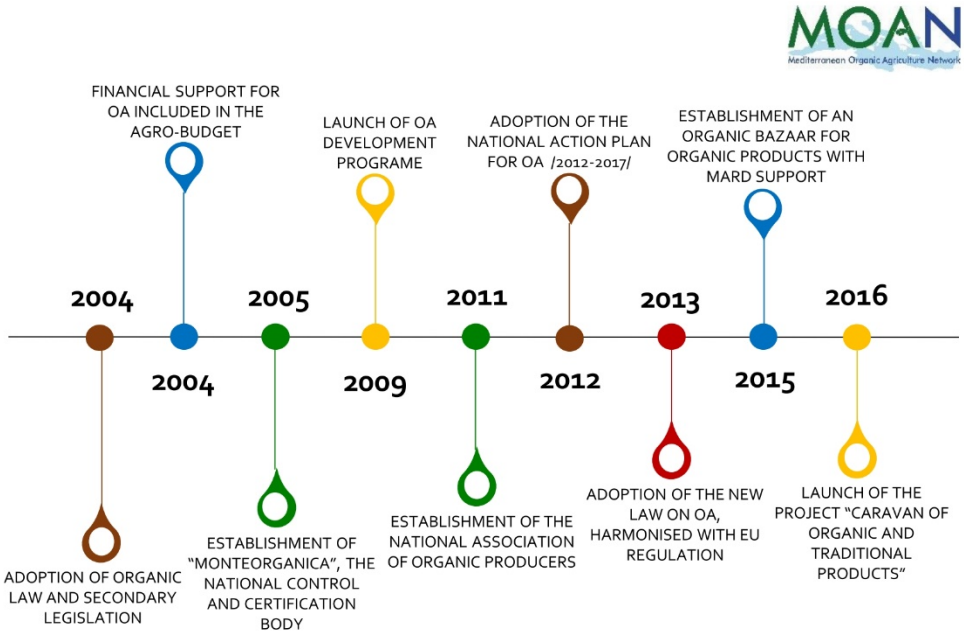
- @ www.mbpzhr-ks.net – Ministry of Agriculture, Forestry and Rural Development.
- @ www.azhb-ks.net – Agency for Agricultural Development.
- @ www.mmph.rks-gov.net – Ministry of Environment and Spatial Planning.
- @ www.dak-ks.org – Kosovo Accreditation Agency – Ministry of Trade and Industry.
- @ www.kiesa.rks-gov.net – Kosovo Investment and Enterprise Support Agency.
- @ www.iadk.org – Initiative for Agriculture Development of Kosovo.

Montenegro
Country profile

HISTORICAL DEVELOPMENT | Montenegro

Andrijana RAKOČEVIĆ[1]

The first steps towards the organic agriculture (OA) regulation in Montenegro were taken in 2004-2005, when the first organic law and the secondary legislation were adopted. At the same time, financial support for OA was provided as part of the national agro-budget (infographic below). At the end of 2005, the national control and certification body "*Monteorganica*" was established, and was authorized and financed by *The Ministry of Agriculture and Rural Development* (MARD).



In 2011, the *National Association of Organic Producers* was established being the first initiative of farmers associations. Nowadays, a smaller local associations of organic producers are present and closely cooperate with the national association. The first national action plan for OA was adopted in 2012, while in 2013 a new law on OA, harmonized with EU regulation (EU 834/2007 and 889/2008) was approved. In the period 2014-2017, a secondary legislation was adopted to pursue full harmonization with Regulation (EC) No 889/2008.

A further step forward in the promotion of OA was in 2016 with the establishment of an organic bazaar in Podgorica, where organic farmers can sell their products once a week, and the start of the project "*Caravan of organic and traditional products*" aiming at promoting organic and traditional products.

[1] Ministry of Agriculture and Rural Development. Mediterranean Organic Agriculture Network (MOAN) country representative.

MAIN SECTOR INSTITUTIONS — Montenegro

The Ministry of Agriculture and Rural Development (MARD) is the competent authority for OA in Montenegro and is an umbrella institution in charge of defining the agricultural policy and undertaking the measures needed for its implementation. *The Quality Policy and Land Administration Department* within the *Directorate for Agriculture* in MARD adopts the regulations regarding quality policy, organic production, and agricultural land.

Among the other key sector institutions, the Biotechnical Faculty (University of Montenegro), the aforementioned national association of organic producers, and the national control body play an important role in the OA sector functioning and development.

REGULATORY FRAMEWORK AND SUPPORT POLICIES — Montenegro

The National law on organic production was published and came into force in 2013, providing for the rules on plant and livestock production, processed food and feed and aquaculture (details in Table 1). For each section, a rulebook was published in the Official Gazette of Montenegro, reporting the detailed conditions and rules. The National law was later harmonized with Regulations (EC) No 834/2007 and (EC) No 889/2008.

An important achievement in national support policies was the implementation of the National Organic Action Plan (NOAP) for the period 2012-2017 (Table 2). The general objective of the NOAP was to: "*Support the development of organic farming, processing, and consumption of organic products in the domestic market, including tourism, and using comparative advantages of Montenegro for creating a coherent, market-oriented organic sector with the necessary professional staff at all levels*".

Incentives in agriculture and rural development are currently adopted on a yearly basis and implemented through the Agro-Budget, prepared by the MARD. Further support is also provided to organic farming by the *Rural Development Measures* and *Measures for Sustainable Management of Natural Resources*. The specific support amounts are summed to the basic payments under the direct support measures for livestock and plant production.

Table 1. National legislation

Date of publication	December 6, 2013
Entry into force (year)	2013
Number	Official Gazette of Montenegro 56/2013
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. Rules**	√
- **Processed Food/Feed**	√
- **Labeling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	EU regulation
Equivalent with EU	Yes

⇒ In 2017, support to organic agriculture was financed under the Additional Financing of MIDAS project (Montenegro Institutional Development and Agriculture Strengthening) and EU IPA project (EU Instrument for Pre-accession Assistance), aimed at strengthening Montenegrin agriculture with the establishment of a Land Parcel Identification System.

⇒ Support is provided to organic producers for plant production, livestock production and beekeeping.

⇒ Support is also provided by the European Commission through a financing instrument to fund assistance to countries on their way to membership - Instrument for Pre-Accession Assistance in Rural Development (IPARD).

⇒ Here, organic producers and processors have an opportunity to invest in agricultural holdings to restructure and adapt to the EU standards, and to invest in processing and marketing of agricultural products.

Table 2. Details on National Organic Action Plan	
English name	National Action plan for Organic Production
Full name in national language	Nacionalni akcioni plan razvoja organske proizvodnje
Running from – to:	2012-2017
Key targets	- Development of organic farming and processing - Development of local market and connection with tourism industry - The professional staff at all sector levels
Financial resources	The government of Montenegro with the support of the Danish Government

STATISTICS — Montenegro

The key sector statistics, reported in Table 3 for the years 2016 and 2017, indicate a decrease in the organic agricultural area from 3 470 ha in 2016 to 2 797 ha in 2017, and confirm, on the other hand, a positive trend of the organic land in conversion with a 615 ha increase during the same period.

Organic forest and wild collection remain the dominant area of production of OA in Montenegro, with more than 143 000 ha in total.

The total number of organic operators increased from 280 in 2016 to 308 in 2017, all being agricultural producers except for 3 processors. Data on the local market and the number of retailers, exporters, and importers were not available.

Table 3. Key data	2016	2017
Organic agricultural area (ha)	3 470	2 797
Organic share of total agricultural land (%)	1.12	1.09
Organic forest/wild collection (ha)	143 409	143 451
Organic land in conversion (ha)	420	1 035
Total No. of organic operators	280	308
No. producers	280	308
No. processors	3	3
No. retailers	n.a.	n.a.
No. exporters	n.a.	n.a.
No. importers	n.a.	n.a.
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

Montenegro Organic Agriculture Logo

The main crop and livestock categories are reported in Table 4. Among the arable crops, cereals rank first, covering 235 ha, followed by clover grass mixtures (128 ha). As for permanent crops, mixed fruit plantations (usually combining cultivation of apples, pears, and plums in the same area) take the lead with 251 ha, followed by plums (79 ha) and apples (32 ha).

Table 4. Main three arable and permanent crops cultivated, and livestock categories (2017)			
	Crop	**Area (ha)**	**% of the total organic area**
Top 3 key arable crops	Cereals	235	8.4
	Clover grass mixtures	128	4.6
	n.a.	n.a.	n.a.
Top 3 key permanent crops	Mixed fruit plantations	251	8.9
	Plums	79	2.8
	Apples	32	1.2
	Species	**No. of heads**	**% of the total organic livestock**
Top 3 key livestock categories	Sheep	1 194	n.a.
	Poultry	390	n.a.
	Goats	265	n.a.

* n.a. – not available

Sheep are the leading livestock category in Montenegro, with a total of 1 194 heads in 2017. Second is poultry, with 390 heads, while the number of goats is 265. It is worth mentioning also the bovine animals, with a total of 218 heads.

The classification of livestock based on use indicates that all sheep present are reared for meat, whereas goats are all intended for milk production. Among the bovine animals, meat production prevails (200 heads), while milk production accounts for a significantly smaller proportion (only 18 heads).

Organic honey production at different sites in Montenegro

Beehives are quite numerous, reaching a total of 2 375 in 2017, and beekeeping represent the predominant sector in organic animal production.

There are two main sources of data and information about the Montenegrin organic sector that are the MARD and "*Monteorganica*".

MARKET AND PROMOTION — Montenegro

The marketing and promotion channels for organic products in Montenegro are summarised in Table 5. However, the list of marketing channels does not include large retailers and wholesalers. Details on the products sold are also presented below:

⇒ **Specialised retail shops** - Honey, dairy products (goat cheese, yogurt, and whey), flour, fresh fruit and vegetables, eggs.

⇒ **Health shops/pharmacies** - Medicinal herbs and teas.

⇒ **Direct on-farm selling** - Honey, dairy products and olive oil.

⇒ **On-line selling** - Buckwheat flour, rye flour, wheat flour, fresh fruit and vegetables, and honey.

Overall, the best-selling organic products on the local market are honey, buckwheat flour, olive oil, and goat cheese.

Table 5. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	X	TV ads	√
Specialized retail shops	√	Radio	√
Health shops/pharmacies	√	Newspapers	√
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesalers	X	Public transport	X
On-line selling	√	Social networks	√
		Fairs	√

Except for public transport, all other promotion channels for organic products are represented in Montenegro.

IMPORT AND EXPORT — Montenegro

Rules for organic imports are set by the national regulation. More specifically, organic products may be imported if the operator possesses a certificate issued by a control body included in the list of designated control authorities and approved control bodies in the EU or in the EU official list of control authorities and control bodies operating in third countries. Operators importing organic products certified by control bodies not included in the official lists shall be subject to a process of recognition by the national competent authorities.

Yogurt, fruit and vegetables, medicinal herbs, dietary supplements, confectionery products, and juices are the most widely imported products. Base on a rough estimate, the amount and value of imported organic products in 2017 were equal to 2 650 tons and 5 500 000 Euros, respectively.

The amount of exported products in 2017 was equal to 560 tons, for a total value of 1 300 000 Euros. Blueberries and medicinal herbs are the leading export categories.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Montenegro

The "*Organic Agriculture Development Programme*" (OADP), is one of the relevant cooperation projects conducted in the OA sector between 2009 and 2013, and led by the MARD in collaboration with the Danish Government. The OADP consisted of two components: i) **Institutional development** (support to organic education and research, preparation of "*Monteorganica*" for accreditation, training of agricultural extension service providers and support for the development of producers associations); and ii) **Competitiveness component** (establishment of a grant facility for investigation in organic production, processing and distribution, and support to marketing and promotion of organic food).

In the field of education and training, the Biotechnical Faculty (University of Montenegro) plays a leading role, by carrying out applied research works addressing critical issues in organic production, especially the greenhouse cultivation. Collaboration and networking with institutions involved in OA and based in the region and in the EU are also stimulated in order to gain cutting-edge knowledge and expertise on the sector.

Study visits were an important aspect of the education and training initiatives undertaken in the past years: a visit to France in 2015 organized for organic farmers by the MARD and "*Agence BIO*" (The French Agency for Development and Promotion of Organic Farming), including a visit to the

organic agriculture fair "*Tech & Bio*" and several French organic farms. In 2016 the MARD organized a study visit for organic producers from Montenegro to "*BIOFACH*" - the world's leading trade fair for organic food, in Germany.

CHALLENGES/PRIORITIES IDENTIFIED	Montenegro

Knowledge generating activities are identified as a priority for organic operators in Montenegro, since most producers have to face many challenges to comply with the organic certification requirements. Adequate education and research should, directly and indirectly, affect production in terms of improving producers' understanding of the principles of organic production, fulfillment of regulations and technological know-how.

Organic farmers associations should be strengthened, including professionals to support the members in facilitating their production work, while improving the produce quality.

One of the biggest challenges for organic agriculture and for the whole agricultural sector in the country is migration from rural areas and the aging farming population.

Organic figs produced in Montenegro

Organic olive orchard

Linkography:

- www.minpolj.gov.me – Ministry of Agriculture and Rural Development.
- www.btf.ucg.ac.me – Biotechnical Faculty (University of Montenegro).
- www.orgcg.org – "*Monteorganica"* – National Control Body.

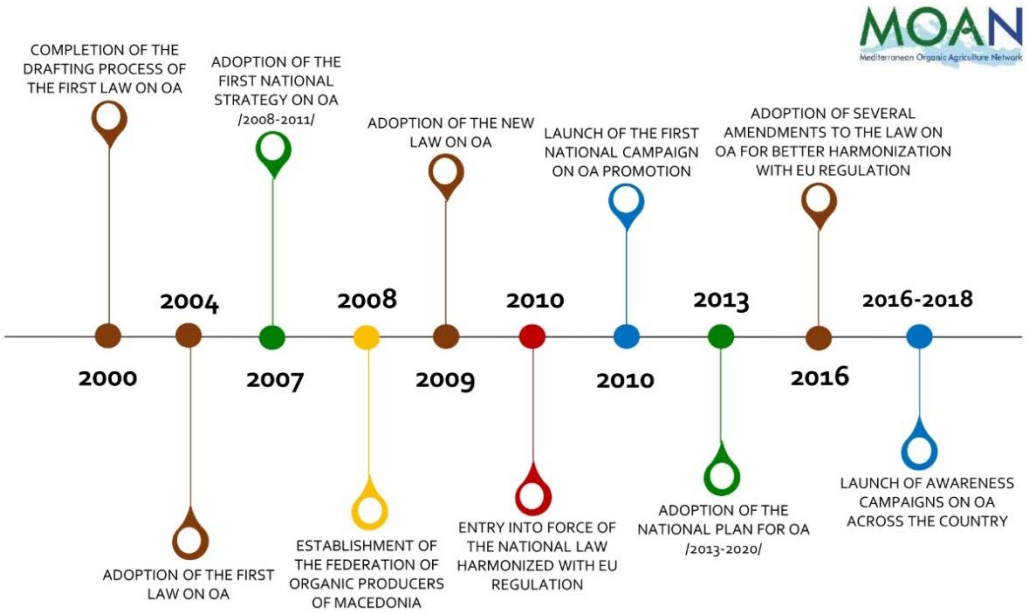
North Macedonia Country profile

HISTORICAL DEVELOPMENT

North Macedonia

Vasko GJORGIJEVSKI[1]

Organic agriculture (OA) in North Macedonia has experienced a more dynamic development since 2000, when the first draft of the National Law on OA was completed (infographic below). The first law on OA was adopted in 2004, and the first national strategy on OA was adopted in 2007, for the period 2008 to 2011. *The Federation of Organic Producers of Macedonia* (FOPM) was established in 2008 with the task of unifying and coordinating regional producers' associations. One year later, in 2009, the new law on OA was adopted and afterwards revised to be harmonized with the EU regulation (EU 834/2007 and 889/2008).



In the historical development process, 2010 was recorded as the first year, in which a national campaign for the promotion of OA was launched. In order to ensure continuous development, in 2013 the National Plan for OA was adopted for the 2013-2020 period. Promotional activities continued in the period 2016 to 2018 with the aim of raising awareness about OA and disseminating knowledge about plant protection products in OA and about the services provided by the "*State Phytosanitary Laboratory*".

MAIN SECTOR INSTITUTIONS

North Macedonia

The organic agriculture unit is part of the Agriculture Department within *the Ministry of Agriculture, Forestry and Water Economy* (MAFWE), which is the competent authority for the organic sector in North Macedonia. The *Institute of Accreditation of Republic of North Macedonia* and FOPM together with two certification bodies operating in the country (*Balkan Biocer*t and *Procert Control and Certification OKS*) are considered key actors of the sector.

[1] Ministry of Agriculture, Forestry and Water Economy. Mediterranean Organic Agriculture Network (MOAN) country representative.

The current national legislation was adopted in 2009 and entered into force the same year. It is fully implemented and covers the rules on plant and livestock production, aquaculture, processing of organic food and feed, labelling, controls, and import rules. National Law is harmonized with the EU regulation (EU 834/2007 and 889/2008). In addition to the Law on Organic Agricultural Production, a number of bylaws were also adopted in 2010 and modified in 2011 for more efficient implementation (Table 1).

Table 1. National legislation

Date of publication	December 7, 2009
Entry into force (year)	2009
Number	Law on Organic Agricultural Production (No. 146/2009)
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	√
- **Processed Food/Feed**	√
- **Labeling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	EU regulation
Equivalent with EU	Yes

⇒ A full review of the national law started in 2014, resulting in new amendments adopted in 2016 for better harmonization with the EU regulation.

⇒ The overall control and supervision system for OA is performed by the *State Agricultural Inspectorate* (SAI) and *Food and Veterinary Agency* (FVA). In addition, each entity applying for financial support to organic production undergoes control by the *Agency for Financial Support of Agriculture and Rural Development* (AFSARD).

Support for the sector from MAFWE was continuous, with a significant increase in the level of subsidies starting 2015. Financial support for OA was also part of the *Programme for Agriculture and Rural Development* 2013-2017. The *National Plan for Organic Production* 2013- 2020 includes the key targets indicated in Table 2.

Except the already existing support that was 30 % higher - in the form of subsidies for organic production - than the amount of direct payments for conventional production; since 2015 the increase in subsidies for OA was:

⇒ 50 % for field crop production, livestock and beekeeping production;

⇒ 70 % for orchards and vine production and 100% for vegetable production.

Table 2. Details on National Plan for Organic Production

English name	National Plan for Organic Production
Full name in national language	Национален План за Органско Производство
Running from – to:	2013-2020
Key targets:	- Strengthening the competitiveness of OA - Increase in the certified OA area up to 4 % of the total agricultural land - Increase in the certified organic livestock (including bee families and fishery) up to 4% of the total livestock in the country - Strengthening organic farmers' associations, other NGOs and their networking within the sector
Financial resources	State budget

In 2017 the implementation of measures for financial support, prescribed in the *Programme of Financial Support in Agriculture and Rural Development*, continued with funds provided from the state budget for stimulating and developing OA. Support to OA is also part of the *National Strategy*

for Agriculture and Rural Development 2014-2020 and *Agro-environmental measures and organic production - IPARD 2014-2020 Programme*.[2]

STATISTICS	North Macedonia

From 2016 to 2017 the organic agricultural area in North Macedonia decreased from 3 240 to 2 900 ha, whereas the land in conversion increased by 59 ha for the same period (Table 3). Organic forest and wild collection areas represent the largest areas of the OA sector in in the country. The figures table 3 should be considered with possible plus/minus variations; however, organic forest and wild collection area covers around 0.5 million ha.

Table 3. Key data	2016	2017
Organic agricultural area (ha)	3 240	2 900
Organic share of total agricultural land (%)	3.0	2.9
Organic forest/wild collection (ha)	470 000	500 000
Organic land in conversion (ha)	1 167	1 226
Total No. of organic operators	533	650
No. producers	533	650
No. processors	100	119
No. retailers	n.a.	n.a.
No. exporters	7	7
No. importers	4	6
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

North Macedonia Organic Agriculture Logo

The positive impulse to the sector came from the increase in the total number of organic operators from 533 in 2016 to 650 in 2017. According to the available data, all organic operators are producers, some of them being at the same time processors, exporters and importers. Organic market value and share data were not available.

Organic cultivation of maize

Organic products at domestic exhibition

Cereals represent the largest area of arable crops, with 940 ha, corresponding to 32.4 % of the total organic area, followed by forage, with 681 ha in 2017 (Table 4). For perennial crops, data were only available for fruits, with a total area of 559 ha, corresponding to 19.3 % of the total organic agricultural area.

[2] The EU Instrument for Pre-Accession Assistance – Rural Development (IPARD) to candidate countries and potential candidate countries.

The organic livestock sector in North Macedonia is well established, especially for sheep, with a total of 92 386 heads in 2017, followed by bovine animals (8 565 heads) and goats (3 833 heads). Beekeeping is represented by 7 676 beehives.

Table 4. Main three arable and permanent crops, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Cereals	940	32.4
	Forage	681	23.5
	n.a.	n.a.	n.a.
Top 3 key permanent crops	Fruits	559	19.3
	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
	Species	**No. of livestock**	**% of the total organic livestock**
Top 3 key livestock categories	Sheep	92 386	88.2
	Bovine animals	8 565	8.2
	Goats	3 833	3.7

* n.a. – not available

MARKET AND PROMOTION — North Macedonia

As for the other Western Balkan Countries, data on domestic market were not sufficiently available in North Macedonia, even though a very wide range of organic products is imported into the country. What can be seen as promising is the fact that all reported marketing channels are present in North Macedonia (Table 5-a). More information would be needed to have a comprehensive picture of the status and structure of the local organic market.

Table 5. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	TV ads	X
Specialized retail shops	√	Radio	X
Health shops/pharmacies	√	Newspapers	√
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesalers	√	Public transport	X
On-line selling	√	Social networks	√
		Fairs	√

The first national event for the promotion of organic food, "*Organic Production Day*", was organised in 2008 and continued in the subsequent years. As previously reported, the first national campaign for the promotion of OA took place in 2010. Currently, OA is promoted via newspapers, leafleting and brochures, social networks, and participation in fairs, while TV, radio and public transportation are not used as promotional channels (Table 5-b).

IMPORT AND EXPORT — North Macedonia

Import rules are defined by the national law on OA, including details on the acceptance and certification of products imported from other countries. There is a wide range of imported products in North Macedonia such as ice teas, smoothies, juices, milk from almond/quinoa/rice/soybeans; oils, coconut oil; muesli; gluten-free cake, gluten-free pasta; organic seeds, wholegrain rice, millet; cocoa, buckwheat, waffles and soy mayonnaise; but data on the value and quantities of these imports were not available

Also for organic export, information were only available for the type of products but no figures for the value and quantities exported. The main exported products are processed traditional food as ajvar, hummus, jam, malidzano, ljutenica, and teas.

COOPERATION/RESEARCH PROJECTS AND EDUCATION	North Macedonia

A very useful activity for regulatory framework was carried out within the IPA Twinning Project "*Organic Agriculture Production and Quality Protection of Agriculture Products*" (2013-2014) to ensure a full review of the North Macedonian national legislation on OA. This resulted in several amendments adopted in 2016

The project objective was to strengthen the national and regional capabilities at the institutional level in the area of Organic Agriculture production and Quality Protection. The international cooperation project "*Increasing Market Employability – IME*" (2014-2018; funded by the Swiss Contact), which established the first register of the organic farmers in Macedonia, is currently being finalised.

The most recent activity (started in 2018) concerns the collaboration with *The Swiss Foundation for the Promotion of Organic Agriculture*, aimed at the harmonisation of national legislation with the new EU regulation (EU 2018/848).

OA is taught as part of the curricula in the two Faculties of Agriculture in North Macedonia, where research on OA is also conducted.

CHALLENGES/PRIORITIES IDENTIFIED	North Macedonia

Extension service is present in the country but still with very limited activity with the organic farmers and sector in general, which hampers the sector development significantly and should be strengthened in the future.

The gap in the data collection system regarding domestic and import/export market remains the challenge and should be targeted by the international cooperation projects, to bring knowledge and good practices in this segment of the North Macedonian OA sector.

Organic products for box-scheme delivery

Traditional food prepared from organic products

Linkography:

- www.mzsv.gov.mk – Ministry of Agriculture, Forestry and Water Economy.
- www.iarm.gov.mk – Institute of Accreditation of Republic of North Macedonia.
- www.fpopm.com – Federation of Organic Producers of Macedonia.
- www.balkanbiocert.mk – "*Balkan Biocert*" – control and certification body.
- www.procert.mk – "*Procert Control and Certification OKS*" – control and certification body.

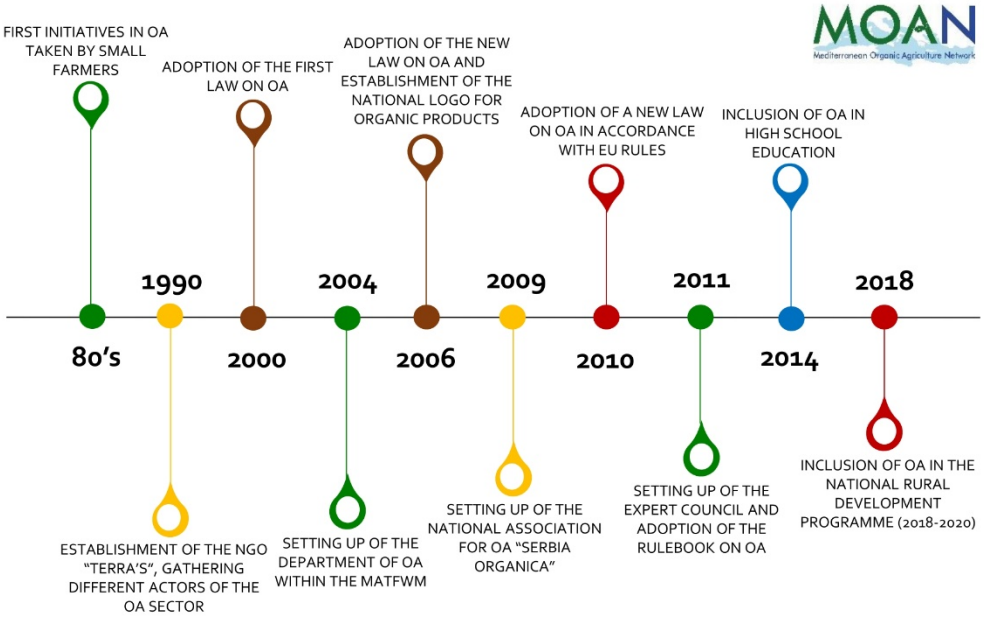
Serbia
Country profile

HISTORICAL DEVELOPMENT

Serbia

Jelena MILIĆ[1]

In the mid-eighties, organic agriculture (OA) started in Serbia through individual farmers' initiatives. In 1990, another step forward was the foundation of the NGO "*Terra's*" by a network of producers, farmers, advisors, and academics involved in organic production in the city of Subotica (North Serbia). As far as the regulatory framework is concerned, the first national law was adopted in 2000, the second in 2006, along with the establishment of the national logo, and the last one in 2010 in compliance with the European Union rules. Details are presented in the infographic below.



In 2004, a department of OA was established within the *Ministry of Agriculture, Forestry and Water Management* (MAFWM); in 2011, an expert council was set up to provide expertise and participate in project implementation. In 2014, OA was included in the curricula of the formal education of agricultural high schools.

MAIN SECTOR INSTITUTIONS

Serbia

Within the MAFWM, the competent authority for OA, two groups are in charge of OA-related issues: *i)* the ***Group for Organic Production*** – as part of the *Directorate for National Reference Laboratories*, performs various tasks in the domain of OA (e.g. authorization of control bodies, regulation of use of reproductive materials from non-organic production, amendment and modification of laws etc.); *ii)* the ***Group for Food Quality and Labelling*** – as part of the *Sector for Agricultural Policy*, proposes and participates in the preparation of national measures and programmes for the development of organic production. The latter, coordinates the work of the

[1] Ministry of Agriculture, Forestry and Water Management. Mediterranean Organic Agriculture Network (MOAN) country representative.

Expert Council for organic production and cooperates with domestic and international institutions in the field of OA.

Apart from the MAFWM, two more important institutional actors in the Serbian organic sector are the "*Accreditation Body of Serbia*" and the "*Chamber of Commerce and Industry of Serbia*".

Among the other key sector actors, it is noteworthy to mention the National Association for Organic Production "*Serbia Organica*" that plays an active role among producers and consumers, the NGO "*Terra's*" (previously mentioned)the "*Vojvodina organic cluster*", the "*Center for organic production Selenča*", and the citizens association "*Luka znanja*" (The Knowledge Harbour).

REGULATORY FRAMEWORK AND SUPPORT POLICIES	Serbia

As previously referred, starting from 2000 when the first national law on OA was adopted, the national legislation has been fully implemented also in accordance with the guiding principles of EU legislation. The current national law came into force in 2011, when the "*Rulebook on control and certification and methods of organic production*" was also adopted. In 2017, a second rulebook was adopted, concerning the documentation to submit to an authorized control body for the issuance of conformation and the conditions and methods of sale of organic products.

Details on national legislation are presented in Table 1, including the rules on plant, livestock and aquaculture production, processing, labelling, control and import of organic products. With regard to the recognition by the EU authorities, in 2010 Serbia applied for inclusion in the list of third countries.

Table 1. National legislation	
Date of publication	May 7, 2010
Entry into force (year)	2011
Number	Law on Organic Production (No 30/10)
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	√
- **Processed Food/Feed**	√
- **Labelling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	EU regulation
Equivalent with EU	No

⇒ The rulebook on control and certification in organic production and organic production methods defines in detail, *inter alia*, the conditions and procedures which must be fulfilled by the control body to perform control and certification tasks.

⇒ It sets out, as well, the methods for organic plant and livestock production, the technological procedures for processing, the requirements for storage and transportation of organic products, the content, form and the manner of keeping records, etc.

The first financial support for OA in Serbia was provided in 2004, in the form of subsidies for organic producers. Recently, in 2018, a plan for the development of organic production was adopted as an integral part of the "*National Rural Development Programme*" for the period 2018-2020, developed by the MAFWM (Table 2). The subsidies for rural development within the programme are divided overall into five pillars, listed in Table 2.

The Law on subsidies in agriculture and rural development (Official Gazette RS No 10/13, 142/2014, 103/2015 and 101/2016) represents the legal basis for the allocation of subsidies to the organic sector. This Law allocates minimally 40 % more to organic production compared to

conventional production. Subsidies are intended for production in the conversion period and for certified plant and livestock production.

⇒ Subsidies for plant production are granted based on the cultivated area, while the number of heads is taken into account for livestock faming.

⇒ For beekeeping, subsidies are allocated considering the number of beehives, whereas price premium is introduced for milk.

⇒ Additional support is given for OA in the form of refunds for control and certification costs.

Table 2. Details on National Strategy for Organic Agriculture	
English name	National rural development programme 2018-2020 (Official Gazette RS No. 60/18)
Full name in national language	Национални програм руралног развоја од 2018. до 2020. године ("Сл. галсник РС" бр. 60/18)
Running from – to:	2018-2020
Key targets:	- Agricultural production and processing sector - Environment and natural resources - Income and quality of life in rural areas - Implementation of local rural development strategies - Knowledge generation and transfer
Financial resources	State budget

STATISTICS — Serbia

In 2017, the organic agricultural area in Serbia covered 13 423 ha, with a decrease of almost 1 000 ha compared to 2016 (Table 3). A similar trend can be observed for area under conversion, whereas the total number of organic operators rose from 390 in 2016, to 434 in 2017. This increase mainly concerned the category of producers and processors. In contrast, the number of exporters dropped from 60 to 48 in the same period. Data on the value and share of the domestic market were not available.

Table 3. Key data	2016	2017
Organic agricultural area (ha)	14 358	13 423
Organic share of total agricultural land (%)	0.41	0.39
Organic forest/wild collection (ha)	n.a.	n.a.
Organic land in conversion (ha)	6 966	5 895
Total No. of organic operators	390	434
No. producers	298	333
No. processors	108	123
No. retailers	n.a.	n.a.
No. exporters	60	48
No. importers	50	50
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

Serbian organic agriculture logo

For arable crops, cereal production is predominant and wheat takes the lead with 1 348 ha (accounting for 10 % of the total organic agricultural area), followed by corn with 953 ha. Among the perennial crops, raspberries rank first with 1 575 ha (11.7 % of the total organic agricultural area), followed by apples (887 ha) and plums (771 ha) (Table 4).

Organic livestock production is relatively well developed, considering the regional context, and most of the livestock categories are uniformly developed, in terms of number of heads, with sheep being the most numerous (4 665 heads), followed by poultry (4 415 heads) and bovine animals (3

094 heads). Goats are reared as well, totalling 2 048 heads, and beekeeping is practised with 2 307 hives. Equines are also present, with a population of 177 heads.

Table 4. Main three arable and permanent crops cultivated, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Wheat	1 348	10.0
	Corn	953	7.0
	Sunflower	869	6.4
Top 3 key permanent crops	Raspberries	1 575	11.7
	Apples	887	6.6
	Plums	771	5.7
	Species	**No. of heads**	**% of the total organic livestock**
Top 3 key livestock categories	Sheep	4 665	32
	Poultry	4 415	30
	Bovine animals	3 094	21

* n.a. – not available

MARKET AND PROMOTION — Serbia

In Serbia, several market channels exist (Table 5), namely large retail stores, specialised retail shops, health shops and pharmacies, on-farm and on line selling. Details on the domestic market are not available, this lack of information is considered to be a significant gap in the national organic data collection system. By way of example, there is no data available on sales through non-multiple sales channels (box schemes, farm shops, and farmers' markets), while when exploring the Internet (e.g. the webpage of "*Serbia Organica*"), some information can be found on sales in the open markets located in Belgrade, Novi Sad and Subotica.

Table 5. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	**TV ads**	X
Specialized retail shops	√	**Radio**	X
Health shops/pharmacies	√	**Newspapers**	√
Direct on-farm selling	√	**Leafleting/newsletter/brochures**	√
Wholesalers	X	**Public transport**	X
On-line selling	√	**Social networks**	√
		Fairs	√

Promotion of organic products in Serbia is done via newspapers, leafleting and brochures, social networks and participation in fairs.

Serbian stand at "*Biofach*" fair in Germany

Specialised organic shop in Serbia

IMPORT AND EXPORT — Serbia

Import rules are part of the national legislation; for import of certified organic products, the authorized control body shall issue a confirmation that the product is produced in compliance with the national law and regulations adopted, fulfilling specific requirements (control of documents and certificate issued by the competent authority in the country of origin). Regarding the type and quantities of imported products, data were not available.

The total value of exported organic products for 2017 was estimated to be around EUR 23 million, while volume data were not available. Frozen berries (raspberries and blackberries) and apple concentrate are the main exported organic goods.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Serbia

In the last 5 years, cooperation in the field of research and education was very dynamic. From 2015 to 2016, the *Centre for Organic Production Selenča* and the *Vojvodina Cluster for Organic Agriculture* were involved in the project "*Realization of research and development activities from idea to implementation*", funded by the *National Agency for Regional Development* and aimed at improving the production of organic producers. In 2017, the Twinning project "*Strengthening capacities for implementation and further development of the legislative framework in the field of organic production and food quality policy*" was approved by the European Commission. In the same year "*Serbia Organica*" was involved in the project funded by the MAFWM whose name and objective, at the same time, was "*Determination of the amount of lost revenue and additional costs in the production of fruit and vegetables in the conversion period and in certified organic production*".

As indicated earlier, organic agriculture is now part of agricultural high school education programmes. Among the institutions involved in education and research on OA, the key players are the *University of Belgrade – Faculty of Agriculture* (UB-FA) and the *University of Novi Sad – Faculty of Agriculture* (UNS-FA) as state institutions. In addition, OA is part of the educational offer of some private universities. Another very interesting activity is a project started in 2015, with the participation of the UNS-FA and funded by the MAFWM, on innovative educational programmes for the promotion of OA as a tool for rural development. Also, the ongoing project "*Organic bridge*" (2015-2019, funded by IPA-CBC[2] Croatia - Serbia) tackles, among other issues, the low level of transfer regarding knowledge and innovation and research results in the field of organic production and corresponding industries.

CHALLENGES/PRIORITIES IDENTIFIED — Serbia

The identified priorities for the OA sector in Serbia are the establishment of an operational control system in accordance with EU requirements, the increase in areas under organic cultivation and the development of the domestic market.

As demonstrated by the present country profile, the national data collection system should be improved, especially with regard to the domestic market, mainly addressing the following criticalities: the data keeping method is not harmonized with Eurostat, data on production value are not accurate enough, and farm-gate price and retail price data are not available.

[2] The Instrument for Pre-Accession Assistance: Cross-border Cooperation Programme Croatia-Serbia 2014-2020

Organic vegetable production

Open organic market in Belgrade

Linkography:

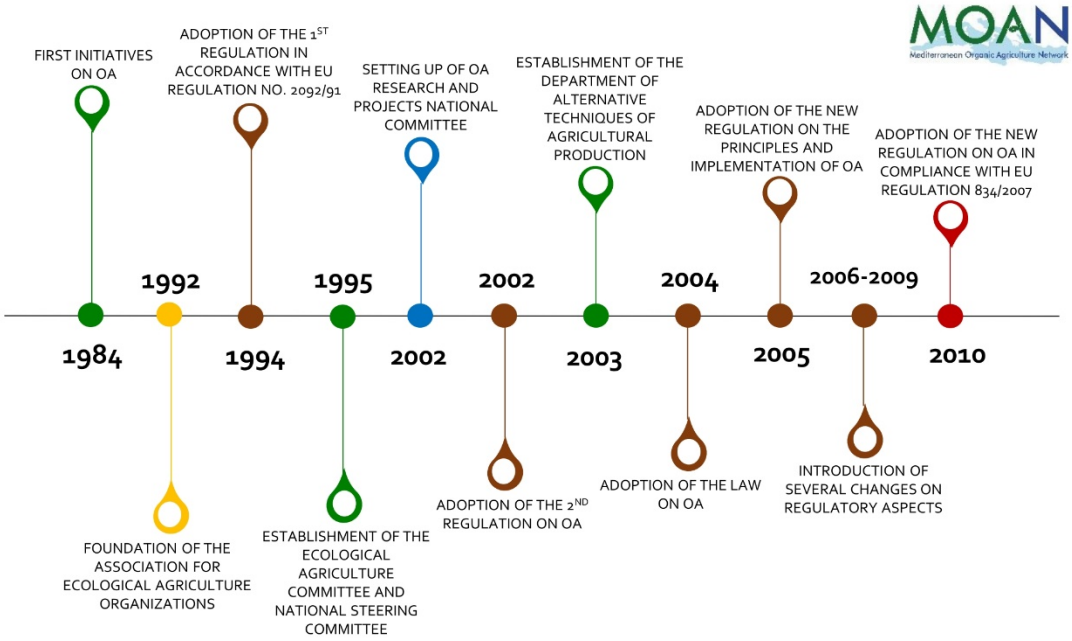
- www.minpolj.gov.rs – Ministry of Agriculture, Forestry and Water Management.
- www.dnrl.minpolj.gov.rs – Ministry of Agriculture, Forestry and Water Management; Directorate for National Reference Laboratories, Group for Organic Production.
- www.ats.rs – Accreditation Body of Serbia.
- www.pks.rs/Default.aspx?idjezik=3 – Chamber of Commerce and Industry of Serbia.
- www.serbiaorganica.info – National Association for organic production "*Serbia Organica*".
- www.terras.org.rs – Organic Association "*Terras*".
- www.organiccentar.rs – Centre for organic production Selenca.
- www.vok.org.rs – Vojvodina Organic Cluster.
- www.lukaznanja.rs – Association "*Luka znanja*".

Turkey
Country profile

HISTORICAL DEVELOPMENT | Turkey

Elif BAYRAKTAR ÖKTEM[1]

The development of organic agriculture (OA) started in Turkey in the mid-eighties, boosted mainly by the high demand of European importing companies. The growth of the Turkish organic sector has been constantly supported by the institutional and regulatory support mostly through the development of regulations; therefore milestones largely report the regulatory framework. The first regulation for OA was adopted in 1994, followed by the new one in 2002 and the Turkish law on OA in 2004. Dynamic changes and regulatory adaptations were made until 2010, when a new regulation was adopted, in compliance with the EU legislative framework (EU 834/2007).



In 1992 the *Association for Ecological Agriculture Organisations* was founded as the first network gathering actors operating, among others, in the field of OA. At the institutional level, the sector's growth has been effectively supported since 1995, when the *Ecological Agriculture Committee (EAC)* and *the Ecological Agriculture National Steering Committee* (*EANSC)* were founded. In 2002, the *OA Research and Projects National Committee* was established, together with the OA Committee, the OA National Steering Committee and the OA National Committee of Trade (see infographic above).

MAIN SECTOR INSTITUTIONS | Turkey

OA in Turkey is well framed at the institutional level, with the *Ministry of Agriculture and Forestry* (MoAF) as the competent authority, under which operates the *General Directorate of Plant Production – Department of Good Practice and Organic Farming*, which is in charge of the OA sector

[1] Ministry of Agriculture and Forestry - General Directorate for Plant Production - Department of Good Practice and Organic Farming. Mediterranean Organic Agriculture Network (MOAN) country representative.

and of the coordination of several committees and units. The institutional strength and outreach are ensured also at regional level, with the presence of OA units in 81 provincial directorates (detailed scheme - Figure 1).

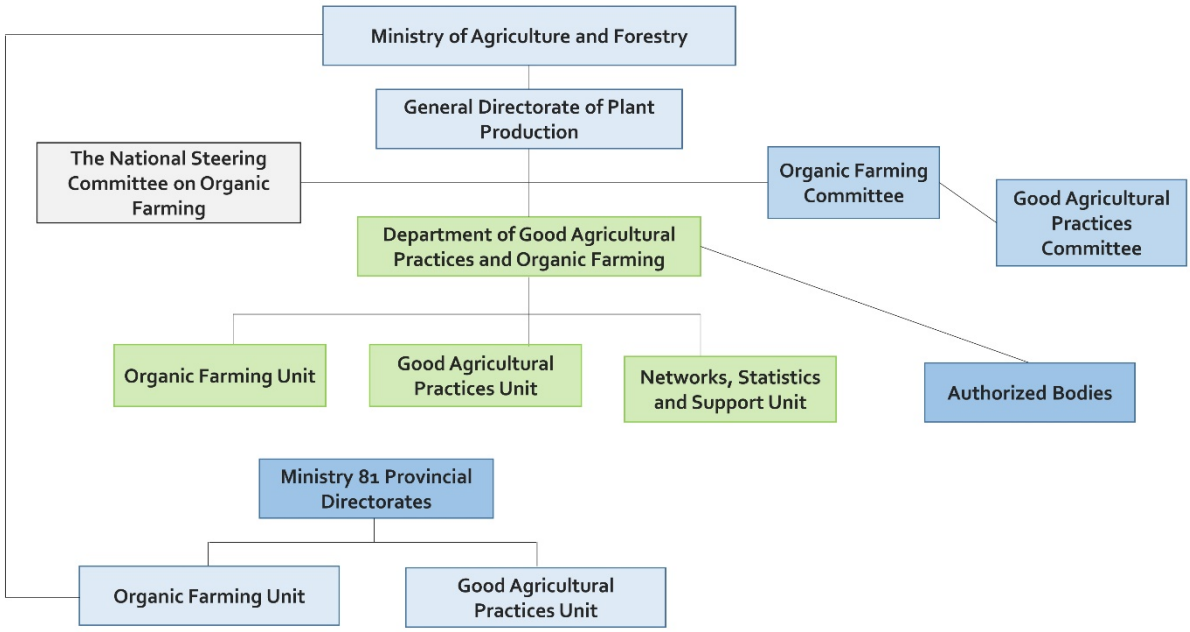


Figure 1: Republic of Turkey Ministry of Agriculture and Forestry - flowchart

Beside state institutions, several NGOs play a significant role in the OA sector as the *Association for Ecological Agriculture Organisations* (ETO), the *Organic Product Producers and Industrialists Association* (ORGÜDER), the *Ecological Life Association* (EKODER) and *BUĞDAY – the Ecological Life Support Association* and *Association of Agricultural Product Control and Certification Organisations* (KSKDER). Their actions cover different areas: technical assistance, promotion, and dissemination for OA, educational activities, market development, products certification, and above all solidarity and support among different stakeholders in the sector.

REGULATORY FRAMEWORK AND SUPPORT POLICIES	Turkey

After several revisions and amendments, the current national regulation on OA in Turkey came into force in 2010. It covers plant and livestock production, aquaculture, processing, labeling, control, and imports (Table 1), and it is in compliance with the EU regulation (EU 834/2007).

The most recent amendment to the present regulation was published in January 2018 (Official Gazette No. 30297) and, among others, it brings changes to aquaculture production (it is now possible, in specific cases of significant losses, to renew aquaculture stocks from non-organic aquaculture), and livestock production (the herd cannot be renewed with non-organic animals without the transition period), labelling (the word "organic" must be part of the label, it must also be indicated if products are re-certified).

Table 1. National legislation	
Date of publication	18 August , 2010
Entry into force (year)	2010
Number	No. 27676
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	X
- **Processed Food/Feed**	√
- **Labelling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	EU
Equivalent with EU	No

⇒ The Ministry of Agriculture and Forestry is responsible for supervision of all organisations carrying out inspection and certification. In 2018, with the most recent amendments to the national regulation, procedures regarding Ministry inspections have been defined in details.

⇒ Also, the additional change introduced is that taxable farmers/wholesalers must issue producer receipts for organic products bought from tax-exempt farmers.

Table 2 highlights the key-targeted achievements of the *Organic Action Plan* implemented during the period 2013 to 2016. It was based on a broad approach aimed to improve all segments of the sector necessary for the rapid development and increase in production quality.

⇒ From 2005 subsidies are available for organic producers, followed with several increases in the payment amount till now. Currently support is given for plant, livestock and aquaculture producers.

⇒ From 2004 organic operators have access to investment and business loans with a lower interest rate.

Table 2. Details on National Strategy and Organic Action Plan	
English name	» Organic Farming Strategic Plan » Organic Farming Action Plan
Full name in national language	» Organik Tarım Stratejik Planı » Organik Tarım Eylem Planı
Running from – to:	2013 - 2016
5 **key targets:**	- Development and expansion of OA - Strengthening of control and inspection services - Improvement of traceability (including statistical infrastructure) - Development of training and extension services - Building institutional capacity
Financial resources	State budget

As part of the agri-environmental measures applied in Turkey, *the Protection of Agricultural Lands for Environmental Purposes Programme* (ÇATAK) is being implemented. Within the ÇATAK, producers are paid for the application of environmentally friendly agricultural production techniques aimed to protect soil and water quality, promote the sustainable use of natural resources and reduce the negative effects resulting from intensive production systems. Organic producers operating in the regions covered by the programme have the possibility to benefit from those payments.

STATISTICS — Turkey

Turkey is among the top five producing countries in the Mediterranean region, ranking fourth behind Spain, Italy, and France, with a total organic agricultural area of 543 033 ha in 2017 (representing 2% of the total UAA). The organic agricultural area increased by almost 20 000 ha compared to 2016, whereas organic forest and wild collection area decreased by more than 10 000 ha for the same period (from 34 106 ha to 22 148). On the other side, a positive trend was recorded for the land in conversion, from 144 735 ha in 2016 to 160 746 ha in 2017 (Table 3), indicating

newcomers in the sector and/or an increase in existing producers' organic area as a promising factor for the future of OA in Turkey.

Another important aspect to note is the increase in the total number of organic operators from 69 408 in 2016 to 76 322 in 2017. Producers are the leading category, followed by processors and exporters. Data concerning the number of retailers and value and share of the local organic market were not available.

Table 3. Key data	2016	2017
Organic agricultural area (ha)	523 777	543 033
Organic share of total agricultural land (%)	2.0	2.0
Organic forest/wild collection (ha)	34 106	22 148
Organic land in conversion (ha)	144 735	160 746
Total No. of organic operators	69 408	76 322
No. producers	67 879	75 067
No. processors	1 422	1 142
No. retailers	n.a.	n.a.
No. exporters	46	69
No. importers	61	44
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

Turkish Organic Agriculture Logo

Organic production in Turkey is very diversified, with the presence of almost all crop categories. Wheat occupies the largest area among arable crops (97 072 ha), followed by leguminous species for animal feed (clover with 31 940 ha and vetch with 25 130 ha), and the industrial organic crops (oilseeds, aromatic, medicinal and culinary plants, etc.) with a total of 60 069 ha.

Olives are the dominating permanent crop with 58 514 ha, followed by figs (12 728 ha) and hazelnut with 8 859 ha (Table 4). Organic nuts as a category (hazelnut, walnuts, chestnut, etc.) is generally well developed, occupying a total area of 45 281 ha in 2017.

Table 4. Main three arable and permanent crops, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Wheat	97 072	17.9
	Clover	31 940	5.9
	Vetch	25 130	4.6
Top 3 key permanent crops	Olives	58 514	10.8
	Fig	12 728	2.3
	Hazelnut	8 859	1.6
	Species	**No. of heads**	**% of the total organic livestock**
Top 3 key livestock categories	Poultry	1 262 307	97.8
	Sheep and Goats	21 832	1.7
	Bovine animals	6 632	0.5

* n.a. – not available

Organic poultry production in 2017 exceeded 1.2 million heads, almost equally distributed between laying hens and broilers. Sheep and goats come second, with 21 832 heads as cumulative value, followed by bovine animals (6 632 heads). As to beekeeping, the total number of beehives in 2017 was 48 153.

MARKET AND PROMOTION — Turkey

Availability of domestic market data is still a challenging issue largely due to the lack of targeted and specific research studies on that subject. We were able to identify the presence of almost all marketing channels listed in Table 5-a and to a lesser extent, of promotion channels (Table 5-b). The estimated value of the domestic consumption of organic products in 2015 was around 20 million US dollars, and it is expected to increase significantly by 2020.

Table 5. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	TV ads	X
Specialized retail shops	√	Radio	X
Health shops/pharmacies	X	Newspapers	X
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesalers	X	Public transport	X
On-line selling	√	Social networks	√
		Fairs	√

IMPORT AND EXPORT — Turkey

Information regarding the import and export of organic products to/from Turkey exists but is still limited. Import requirements are covered by the national regulation: it is needed, inter alia, that importing companies are re-certified by a certification body located in Turkey. The main importers are the EU countries (Germany, Sweden, The Netherlands etc.), while the main imported product categories are processed food (e.g. fruit jams, baby food) and industrial crops produced by Turkish companies abroad (e.g. cotton from Kirghizstan, soybean from Kazakhstan).

The value of exported organic goods in 2015 was estimated to be around 70 000 000 US dollars. The main destinations for Turkish organic products are the EU countries (e.g. Germany, France), but also Switzerland, the USA, and Japan. The leading product categories are dried fruits, nuts, lentils, chickpeas etc. In recent years, organic cotton clothing products are recording a rising trend in exports, by amount and value.[2]

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Turkey

The Ministry of Agriculture and Forestry participates in EU and international projects targeting OA thematic, MoAF is one of the participants in the CORE ORGANIC PLUS project (*Coordination of European Transnational Research in Organic Food and Farming Systems*), (2013-2018). Further, Turkey is one of the partner countries of the SKIFF project (*Skills for Future Farmers*), acting in six thematic areas, including OA, to develop innovative educational programmes based on web platforms for more sustainable agricultural production.

OA research in Turkey has been experiencing a rather dynamic development since 2001. By the year 2015, 63 nationwide research projects on OA were finalised. Under the coordination of the *General Directorate of Agricultural Research and Policies*, 21 different projects have been carried out by research institutes of different provinces or are still ongoing. At the national level, 17 research institutes are active in the field of OA.

[2] Source: Ministry of Agriculture and Forestry – Republic of Turkey

The education and training network is well developed, as shown by the fact that from 2004 till 2017 the Ministry and provincial directorates involved 3 736 technical staff and more than 142 000 producers in different training programmes. Realised activities include capacity building at the level of provincial directorates, training for the personnel involved in the control and certification for OA, training for producers and awareness raising among consumers.

CHALLENGES/PRIORITIES IDENTIFIED	Turkey

The development of the local market is a priority for the Turkish OA sector. Diversification of production combined with high population and a well-developed tourist industry could result in much higher consumption of organic products at the domestic level. The success of this initiative will require a joint action with promotional and awareness-raising campaigns.

However, a precondition is to improve the availability of data regarding local market and thus obtain high-quality baseline information which will serve for further planning and improvements of this important aspect.

Organic hazelnuts and figs as very important Turkish products in terms of production and export quantities

Linkography:

- www.tarim.gov.tr – Ministry of Agriculture and Forestry.
- www.eto.org.tr – Association for Ecological Agriculture Organisations (ETO).
- www.orguder.org.tr – Organic Product Producers and Industrials Association (ORGÜDER).
- www.bugday.org – BUĞDAY - Ecological Life Support Association.

MOAN
Mediterranean Organic Agriculture Network

European Union Mediterranean (EU Med) Countries

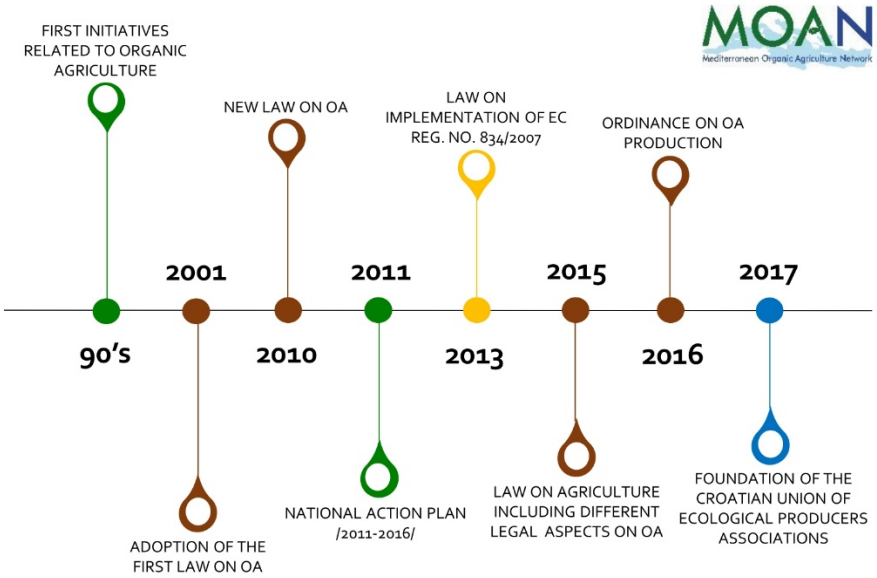
Croatia, France, Greece, Italy, Malta, Portugal, Slovenia and Spain

Croatia
Country profile

HISTORICAL DEVELOPMENT | Croatia

Gita ĐURKOVIĆ[1]

The development of organic agriculture in Croatia dates back to the early 90's when the first producers started to follow the organic principles. In 2001, the first legal framework for OA and the adoption of the Law on OA (*Official Gazette* No. 12/2001) gave a strong impulse to the sector development. Ten years later, the new law on organic production and labelling of organic products came into force (infographic below).



The *National Action Plan for Organic Agriculture* was published in 2011, covering the period 2011-2016. The law on the implementation of Council Regulation (EC) No. 834/2007 was published in 2013 when the legal framework was harmonized with the European Union (EU). The legal framework was further consolidated in 2015 and 2016 (more details in the following sections), while in 2017 the union gathering different associations of Croatian organic producers was established.

As a curiosity, we should note that in 1861 Rudolf Steiner (founder of the biodynamic agriculture) was born in Donji Kraljevec, Coratia (Međimurje region - northern Croatia). In the year 2007, in Donji Kraljevac, Centre Dr. Rudolf Steiner was founded.

MAIN SECTOR INSTITUTIONS | Croatia

Within the *Ministry of Agriculture*, the competent authority, the *Department for Organic Agriculture* operates under the *Directorate for Agriculture and Food Industry* and is in charge of OA. Other institutions important for the OA sector are the *Agency for Payments in Agriculture, Fisheries and Rural Development*, *Croatian Agriculture and Forestry Advisory Service*, *Chamber of Agriculture*, *Croatian Chamber of Economy* and *Croatian Accreditation Agency*.

[1] Ministry of Agriculture – Department for Organic Agriculture. Mediterranean Organic Agriculture Network (MOAN) country representative.

Different associations of organic producers and operators are present at the level of the counties (Croatia is administratively divided into 20 counties) and at the country level (e.g. Istria Eko Product, Dalmatia Eko, Zagreb Eko etc.).

REGULATORY FRAMEWORK AND SUPPORT POLICIES — Croatia

As a EU member country, the Croatian legal framework for OA is harmonized with and equivalent to EC Reg. No. 834/2007 and 889/2008; it includes plant, livestock, and aquaculture production rules, processing, labelling, control and import rules on organic products (Table 1).

Currently, the sector is regulated by the Law on Agriculture (*Official Gazette* No. 30/15) and the Ordinance on organic farming (*Official Gazette* 19/16). The first law was designed to streamline the legal framework, while the second includes national procedures for the implementation of EU regulation.

Table 1. National legislation

Date of publication	March 17, 2015
Entry into force (year)	2015
Number	Law No. 30/15
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	√
- **Processed Food/Feed**	√
- **Labelling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	EU
Equivalent with EU	Yes

⇒ Croatia *Rural Development Programme (2014-2020)* supports and promotes environmentally-sound farming systems including OA.

⇒ *Measure 11 – Organic farming* addresses, among others, the following needs:

- Soil erosion prevention and increase of soil fertility and soil organic matter.
- Maintenance of water, soil and air quality.
- Conservation of landscape and biodiversity.

Support to organic farming is provided through *Rural Development Programme 2014-2020* (RDP), under *Measure 11 – Organic farming* (Sub-measure 11.1 - payment to convert to organic farming practices and methods and sub-measure 11.2 - payment to maintain organic farming practices and methods). The objective of the given measure is to promote OA practices and to deliver environmental benefits considering the following pillars: air, soil, water, and biodiversity. Also, the present programme considers an increase of the area under OA as an important tool to combat climate change.

Furthermore, support to organic farmers in Croatia is also available through direct payments and IACS payments (*Integrated Administration and Control System*). In general, payments to organic operators are on average 30 % higher compared to the conventional one.

STATISTICS — Croatia

Organic agricultural area in Croatia records an increase of around 3 000 ha for the period 2016 – 2017 (from 93 814 to 96 618 ha). The data for organic forest and wild collection, and for the area under conversion were not available. The total number of organic operators increased from 3 673 to 4 328 for the same period. The growth occurred in all categories of organic operators (Table 2). It should be noted that a high proportion of processors are also producers at the same time. Information regarding the organic market value and share was not available.

Table 2. Key data	2016	2017
Organic agricultural area (ha)	93 814	96 618
Organic share of total agricultural land (%)	6.1	6.5
Organic forest/wild collection (ha)	n.a.	n.a.
Organic land in conversion (ha)	n.a.	n.a.
Total No. of organic operators	3 673	4 328
No. producers	3 546	4 133
No. processors	312	357
No. retailers	12	23
No. exporters	1	3
No. importers	8	14
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

Croatian Organic Agriculture Logo

Breakdown by the crops (crop categories) shows that the most represented arable crops are fodder with a total of 16 248 ha in 2017, followed by industrial crops (14 604 ha) and cereals (11 326 ha). Permanent crops occupy a significantly smaller portion of organic land, with nuts ranking first (6 401 ha), followed by olives and vineyards with 1 750 ha and 1 010 ha, respectively (Table 3).

Organic livestock production in Croatia

Almost half of the organic agricultural area (42.2 %) is devoted to meadows and pastures, with a total of 40 745 ha. Despite this, organic production in Croatia can be considered very diverse since a wide range of plant species is cultivated.

Table 3. Main three arable and permanent crops cultivated, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Fodder crops	16 248	16.8
	Industrial crops	14 604	15.1
	Cereals	11 326	11.7
Top 3 key permanent crops	Nuts	6 401	6.6
	Olives	1 750	1.8
	Vineyards	1 010	1.0
	Species	**No. of head**	**% the total organic livestock**
Top 3 key livestock categories	Sheep	54 583	66.1
	Bovine animals	17 226	20.8
	Goats	3 381	4.1

In 2017, the total number of organic livestock was 82 622 heads, from which more than 54 000 sheep, followed by bovine (17 226) and goats (3 381). Also, breeding of poultry, equine, pigs and

rabbits is reported. Furthermore, the total number of beehives was 1 721 in 2017, while about aquaculture the total production in 2017 was 135 tons.

MARKET AND PROMOTION — Croatia

Almost all marketing channels listed in Table 4 are used for organic products (except health shops and pharmacies). As to promotion, TV, radio, newspapers and public transport were not identified as active channels, while OA is promoted through leafleting and brochures, social networks and participation in international and national fairs.

Table 4. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	TV ads	X
Specialized retail shops	√	Radio	X
Health shops/pharmacies	X	Newspapers	X
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesaler	√	Public transport	X
On-line selling	√	Social networks	√
		Fairs	√

In the past, awareness-raising campaigns on promotion and information sharing were conducted among consumers and farmers. Cooperation among different actors was promoted to support the development of the local market. Despite constant growth, development of the local market is not considered to be at a satisfactory level.

IMPORT AND EXPORT — Croatia

Information and data on import and export were not officially available. Most of the fresh organic produce is consumed on the local market, while imported goods are mostly processed food. Also, according to some independent estimations, import volume and value significantly exceed export.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Croatia

As a permanent form of education and training, planned by the national RDP, vocational training skills acquisition actions are mandatory for all producers in OA. All the beneficiaries of the support measures for OA shall attend a given number of training hours, which is higher during the first two years of commitment. Later, the programme is more flexible and producers can select by themselves the activities they would like to follow (e.g. short courses, seminars, workshops, demonstration activities, etc.).

Educational programs including or based on OA are available at University of Zagreb, Josip Juraj Strossmayer University of Osijek and University of Split.

Pilot projects on introducing organic products in public kitchens (i.e. primary school canteens) were implemented in the past as a tool for the popularization of OA. Updates on the current status of given activities are not available.

As an EU member country and one of the strongest economies in the Balkan Peninsula, Croatia is actively involved in many cooperation and research projects related to the OA sector, though details were not available.

CHALLENGES/PRIORITIES IDENTIFIED	Croatia

One of the objectives of *The National Action Plan for Organic Agriculture* (2011-2016) was to reach 8 % of the total utilized agricultural area under OA by 2016. To date, this goal has not been achieved and remains as a priority. Furthermore, investments in OA in Croatia are on average significantly lower compared to other EU member countries; it is expected that the increase in investments will also result in a surface area increase.

As mentioned earlier, local market is not significantly developed and one of the future priorities is to increase awareness among consumers, especially out of big cities and urban areas. Huge potential to support this activity can be found in the sector of tourism, as one of the strongest in the national economy. If coupled with quality labels (such as organic, PDO, PGI and TSG - Protected Designation of Origin, Protected Geographic Indication, and Traditional Specialities Guaranteed, respectively), tourism could boost quality food sector's growth and bring increased visibility at national and international level.

Open market of organic products

Participation of Croatian organic producers at fairs

Linkography:

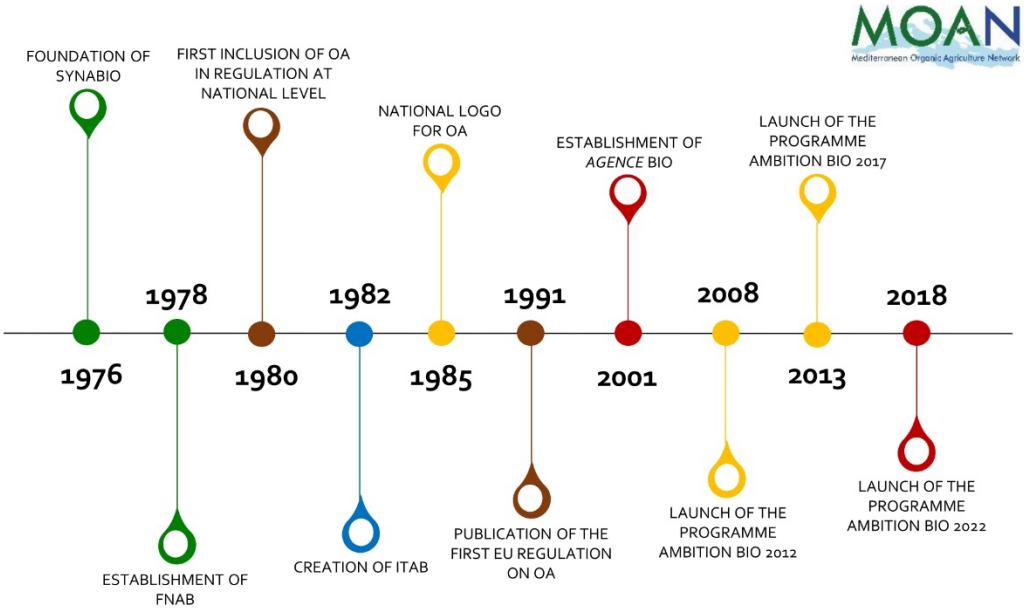
- www.mps.hr – Ministry of Agriculture.
- www.apprrr.hr – Agency for Payments in Agriculture, Fisheries and Rural Development.
- www.savjetodavna.hr – Croatian Agriculture and Forestry Advisory Service.
- www.komora.hr – Chamber of Agriculture.
- www.hgk.hr – Croatian Chamber of Economy.
- www.akreditacija.hr – Croatian Accreditation Agency.

France
Country profile

HISTORICAL DEVELOPMENT | France

Cyrille CARAYON[1]

Organic agriculture (OA) has strong roots in the French agricultural sector, starting even in 1930. From that period until 1970, OA pioneers were active in the promotion of OA, resulting in the establishment of several OA organizations. As one of the most significant milestones, in 1976 the *National Union of Organic Companies* was established (SYNABIO – Union of transformers and organic distributors). Two years after, in 1978, the *National Federation of Organic Farming* (FNAB) was created, while in 1980 OA was for the first time included in the national regulation on agriculture (infographic below).



The sector development was early supported at the level of research with the creation of the *National Institute of Organic Farming* (ITAB) in 1982; and promotion with a publication of the national logo for OA (*Agriculture Biologique* – AB) in 1985. In 2001 "*Agence* BIO" (*French Agency for Development and Promotion of Organic Farming*) was established, as one of the most important actors within the sector. Since 2008, French is having a national programme for the development of OA "*Ambition Bio*", two of which have already been completed ("*Ambition Bio 2012*" and "*Ambition Bio 2017*"), while the third one is currently in implementation ("*Ambition Bio 2022*").

Interestingly, the *International Federation of Organic Agriculture Movements* (IFOAM) was founded in Versailles (France) in 1972.

[1] Ministry of Agriculture and Food. Mediterranean Organic Agriculture Network (MOAN) country representative.

MAIN SECTOR INSTITUTIONS	France

The *Organic Agriculture Unit* operates as part of the *Unit for Management of Quality*, within the *Ministry of Agriculture and Food* as competent authority. Among key sector institutions are the *National Institute of Origin and Quality* – INAO (*Institut national de l'origine et de la qualité*), *French Accreditation Committee* – COFRAC (*Comité français d'accréditation*) and the already mentioned "*Agence* BIO", SYNABIO, FNAB, and ITAB. Also, many regional associations of organic operators are active in France.

The *General Directorate for Competition, Consumption and Fraud Control* – DGCCRF (*Direction Générale de la Concurrence, de la Consommation, de la Répression des Fraudes*) is the French authority responsible for the market control. Every year a specific control campaign is performed to ensure that the organic control system is working well and to inspect possible fraud within the sector.

REGULATORY FRAMEWORK AND SUPPORT POLICIES	France

As an EU member country, the regulatory framework in France consists of the EU legislation and the implementing rules on OA. In the previous years, while waiting for the harmonization of rules at the European level for some specific products and activities within the OA sector, France adopted the following national standards: *i)* Specifications concerning "pet food" based on raw materials from organic production (from 2004); *ii)* Specifications concerning the organic production method for farm animals and supplementing the provisions of the Regulations (EC) No 834/2007 of the Council and Commission Regulation (EC) No 889/2008 (from 2010); and *iii)* Specifications for out-of-home catering of a commercial nature in organic farming (from 2011).

The national control system for OA is based on third-party certification by control bodies (CBs) supervised by the INAO as competent authority, which is also in charge of other quality schemes. The competent authority approves the different CBs working in France, supervises the CBs activities and delivers some derogations according to EU regulation. INAO is also managing a stakeholders consultancy body, *Commission Nationale de l'Agriculture Biologique* (CNAB), where regulatory issues are discussed with organic stakeholders.

Recently, in July 2018 members of the CNAB validated a set of specifications setting the rules for the production of organic quail (*Coturnix Coturnix*), an organic production that did not exist before in France. Also, CNAB set up a working group on organic insects to work on the framework for this new production intended for the feeding of organic animals (e.g. fish, poultry, etc.).

Support to the sector is ensured through the national programme for the development of OA "*Ambition Bio 2022*", financed with a total of EUR 1.1 billion by the state budget (Table 1). The programme is focused on the following axes:

- Axis 1: Development of production
- Axis 2: Structure of the sector (support for the balanced development of different value chains)
- Axis 3: Development of consumption (promotion of the OA products)
- Axis 4: Reinforcement of research
- Axis 5: Training activities for all sector actors
- Axis 6: Adaptation of regulation to contribute to the development of OA

∠ Axis 7: Support for conversion to OA in the outermost regions (French Guiana, La Réunion, Martinique, Guadeloupe, Mayotte and Saint-Martin).

Further, financial support is also available through national fund CASDAR (*Le Compte d'affection Spécial au Développement Agricole et Rural*), which supports development actions in the sector of agriculture and rural development.

⇒ Support to OA is also provided through *European Agricultural Fund for Rural Development* (EAFRD) which co-finances the rural development programmes of the Member States (e.g. Measure 11 – Payments for conversion and maintenance to/of organic farming practices).

Table 1. Details on National Strategy and Organic Action Plan	
English name	Ambition Bio 2022
Full name in national language	Programme Ambition Bio 2022
Running from – to:	2018-2022
Key target:	- Boost conversions to organic farming and better organize the supply of organic products.
Financial resources	State budget

STATISTICS — France

The total organic agricultural area in France recorded an increase by more than 200 000 ha for the period 2016-2017, reaching 6.6% of the total utilized agricultural area (UAA). With the total organic area of 1 745 000 ha in 2017, France ranks third among EU Med countries, after Italy and Spain. Increase in the area was coupled with an increase in the total number of organic operators, from 47 106 to 54 044 for 2016 and 2017, respectively. The present increase occurred in all categories of organic operators (Table 2).

Considering the value of the local organic market, France is among the top three countries in the world, with EUR 8.3 billion of the organic market value in 2017 (accounting for the share of 4.4% from the total market).

Table 2. Key data	2016	2017
Organic agricultural area (ha)	1 530 000	1 745 000
Organic share of total agricultural land (%)	5.7	6.6
Organic forest/wild collection (ha)	n.a.	n.a
Organic land in conversion (ha)	n.a.	n.a.
Total No. organic operators	47 106	54 044
No. producers	32 266	36 691
No. processors	10 600	12 286
No. retailers	4 017	4 783
No. exporters	n.a.	n.a.
No. importers	223	284
Organic market (€)	7 billions	8.3 billions
Share of the total market (%)	3.8	4.4

*n.a. – not available

France Organic Agriculture Logo

The main crop and livestock categories are reported in Table 3. Among the arable crops cereals are occupying the highest area, with a total of 291 766 ha in 2017, followed by oilseeds (59 172 ha) and protein crops (28 281 ha). Vineyards are the first when considering permanent crops, with the total area of 78 502 ha in 2017, while fruit crops and olives are closing the top three permanent crop categories, with 59 172 ha and 4 735 ha, respectively (Table 3). OA in France is in general characterized by a very wide range of cultivated species.

Table 3. Main three arable and permanent crops cultivated, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Cereals	291 766	16.7
	Oilseeds	59 172	3.4
	Protein crops	28 281	1.6
Top 3 key permanent crops	Vineyards	78 502	4.5
	Fruits	38 657	2.2
	Olives	4 735	0.3
	Species	**No. of head**	**% of the total organic livestock**
Top 3 key livestock categories	Poultry	17 128 499	91.3
	Bovine animals	649 856	3.5
	Sheep	602 124	3.2

The high level of organic livestock sector development is in line with crop production, thus France has more than 18 million of livestock heads when taking in consideration the main species (bovine animals, pigs, sheep, and goats). But also it has significant production of other animal species, including rabbits, equine animals, etc. Among the top three livestock categories, poultry is the first, followed by bovine animals and sheep (Table 3).

Organic beekeeping sector in 2017 had more than 100 000 beehives. Further, the aquaculture sector is also well developed with the total production of almost 5 500 tons in 2017.

MARKET AND PROMOTION — France

High value and share of the domestic organic market are reflected in the presence of all marketing channels listed in Table 4-a; in addition to them also collective catering is one of the active channels in France. Among the best-sold products are eggs, milk and milk products, fresh fruits and vegetables, meat, grocery products, spirits, etc. The highest value of organic products sold is done via supermarkets and organic retailers.

Table 4. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarket, Supermarket)	√	TV ads	√
Specialised retail shops	√	Radio	X
Health shops/pharmacies	√	Newspapers	√
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesalers	√	Public transport	X
On-line selling	√	Social networks	√
		Fairs	√

Among the promotion channels listed in Table 4-b, except radio and public transport, all others are used for the promotion of organic products.

IMPORT AND EXPORT — France

From the total French organic consumption in 2017, 69 % was produced in France, while the remaining 31 % was imported. Compared to the 2016 import increased by 2 % (from 29 to 31 %).

At the wholesale stage, the value of organic import increased by 27 % for the same period. However, more than 40 % of the value of these imports goes for exotic products (i.e. banana, cocoa, coffee, etc.) or purely Mediterranean (i.e. olives and citrus fruits). Import of these products is related

to the fact that France is not producing them, or there is a very little of production. Thus, when excluding exotic products, the supply coming from French production reaches 82 % of local consumption.

Despite significant domestic demand, French companies exported organic products for the total value of EUR 707 million in 2017 (presenting an increase of 12 % compared to 2016). 59 % of these value comes from the export of organic wines. When considering the export growth by product categories, a significant increase in 2017 was recorded for sweet and salty grocery (an increase of EUR 59 million compared to 2016) and cider and organic beer (an increase of EUR 11 million for the same period).

RESEARCH PROJECTS AND EDUCATION	France

In the field of agriculture research, the *National Institute of Agricultural Research* – INRA (*Institut National de la Recherche Agronomique*) is the main research institute. Within the INRA several researchers and teams are working on organic topics, and they also have an internal commission for organic research working to promote research on OA (*Commission interne de l'Agriculture biologique*).

The National Institute of Organic Farming – ITAB (*Institut Technique de l'Agriculture Biologique*) is a dedicated organic institute working on research and on experimentation to develop techniques in OA. ITAB is working in different sectors (i.e. plants, animals, genetics, crop protection etc.) and also in partnership with other institutions. In general, French research institutions related to OA are well represented in important EU funding schemes and projects as H2020, Eranet Coreorganic+, Ok-Net Arable, etc.

Every year, organic research projects are selected through a national call funded by the "Agence BIO", for the total value of EUR 8 million. Experiments are also done in collaboration with some of the farmer's associations. Further, the Ministry is promoting organic training in agriculture schools with demonstration farms, and with the involvement of training networks as "*Formabio*" (official network for organic agriculture within educational and vocational schools and public and private institutes in France).

CHALLENGES/PRIORITIES IDENTIFIED	France

As a priority, France has set a goal of having 15 % of total UAA under organic agriculture by 2022. On this road the "Ambition Bio 2022" programme is helping farmers to meet the needs of consumers with increased resources devoted to supporting conversion (EUR 200 million in state credits, EUR 630 million in EAFRD funds, plus EUR 50 million per year via the diffuse pollution tax starting from 2020): doubling the "*Avenir BIO*" fund managed by the organic agency (progressively raised from EUR 4 million to EUR 8 million per year), and finally an extension and revaluation of the organic tax credit from 2 500 to 3 500 Euro until 2020.

Linkography:

- www.agencebio.org – "*Agence BIO*".
- www.itab.asso.fr – National Institute of Organic Farming – ITAB.
- www.fnab.org – National Federation of Organic Farming – FNAB.
- www.synabio.com – National Union of Organic Companies – SYNABIO.
- www.inra.fr – National Institute of Agricultural Research.

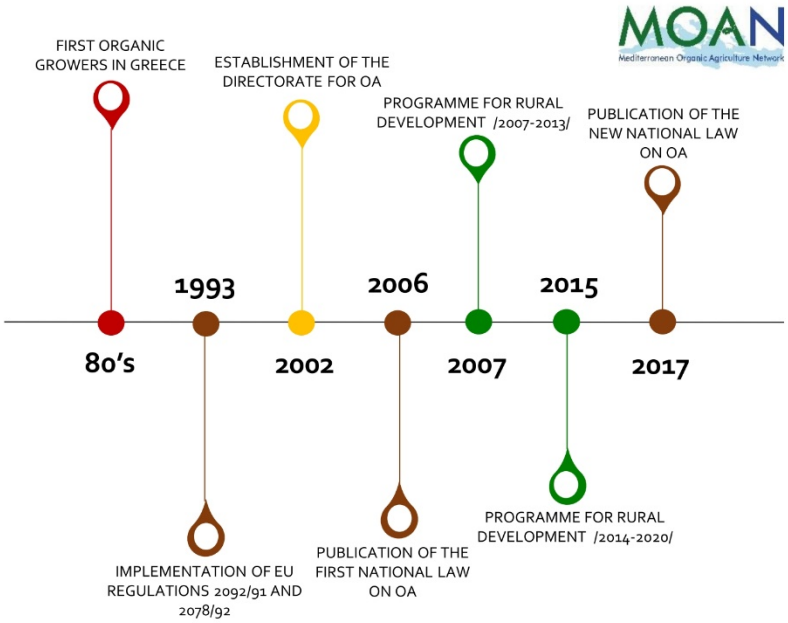
Greece
Country profile

HISTORICAL DEVELOPMENT

Greece

Thanasis GKAGIOGIAKIS[1]

The first organic growers appeared in Greece in the 80's, mostly involved in the production of olive oil and raisins for export. In 1993 this sector was better defined with the implementation of the EU regulations 2092/91 and 2078/92. Almost 10 years later, in 2002, the *Directorate for Organic Agriculture* (OA) was established, whereas in 2006 the first national law on OA was published (infographic below).



In 2007, the implementation of agro-environmental support programme (2007-2013) started including the measures for organic operators. This support continued with the "*Rural Development Programme* 2014-2020", currently in implementation. As the last step at the regulatory level, the new national law on OA was issued in 2017.

MAIN SECTOR INSTITUTIONS

Greece

The Directorate of Quality Schemes and Organic Farming, operating under the *Ministry of Rural Development and Food*, is the competent authority for OA in Greece. Other important state actors are the *Directorate General of Food*, *Unit of Organic Products of Plant Origin*, *Unit of Organic Products of Animal Origin and Aquaculture*, and the control authority *The Greek Agricultural Organization ELGO-DEMETRA*.

The main organic associations which are currently operating in Greece are the *Federal Association of Organic Farmers of Greece* and the *Association of Organic Farmers of Open Farmers' Markets*.

[1] Ministry of Rural Development and Food. Mediterranean Organic Agriculture Network (MOAN) country representative.

REGULATORY FRAMEWORK AND SUPPORT POLICIES — Greece

Organic agriculture in Greece is regulated and certified according to the EU regulation and defined at national level with the organic law. The latest update of the regulatory framework occurred in 2017 when the new national law was published and came into force (Table 1).

Table 1. National legislation

Date of publication	October 9, 2017
Entry into force (year)	2017
Number	Ref. No of Ministerial Decision 2543/103240/02-10-2017, gazette: 3529.
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	√
- **Processed Food/Feed**	√
- **Labelling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	EU
Equivalent with EU	Yes

⇒ The control of organic products on the market is carried out mainly by ELGO - DEMETRA, which is the authority responsible for control in all areas of organic farming.

⇒ ELGO - DEMETRA controls the labeling of organic products and whether this is consistent with the national and EU legislation on OA.

There is no national action plan or development strategy solely devoted to OA in Greece. Support to organic operators is provided through the "*of Rural Development Programme (RDP) 2014-2020*" (Measure 11 – Organic farming). In total, EUR 747 million are allocated to OA. Also, other actions of RDP support producer groups to apply the organic production rules.

Measure 11 of RDP comes under two following priorities:

⇒ Priority 4: Restoring, preserving and enhancing ecosystems related to agriculture and forestry

⇒ Priority 5: Promoting resource efficiency and supporting the shift towards a low carbon and climate resilient economy in agriculture, food and forestry sectors.

Table 2. Details on National Support Policies

English name	Organic Farming - Measure 11 of the 'Rural Development Programme 2014-2020'
Full name in the national language	Βιολογική Γεωργία - Μέτρο 11 ''Πρόγραμμα Αγροτικής Ανάπτυξης 2014-2020''
Running from – to	2017-2020
Key targets	- Protection of the environment; - Production of high quality and safe products; - Animal welfare.
Financial resources	National and EU resources

STATISTICS — Greece

Greece ranks fourth among the EU Med countries, with a total organic agricultural area of 410 140 ha in 2017 (presenting 4 to 5 % of the total UAA). Compared to 2016, this indicator increased by more than 65 000 ha, which can be explained by the 4-fold increase in the land in conversion for the same period (from 34 305 ha to 129 406 ha) (Table 3).

The total number of organic operators in 2017 was 29 595, with an increase in all categories, except for exporters, compared to the previous year. As for the most Mediterranean countries, data were not available for the value and share of the domestic market.

Table 3. Key data	2016	2017
Organic agricultural area (ha)	342 584	410 140
Organic share of total agricultural land (%)	4-5	4-5
Organic forest/wild collection (ha)	n.a.	n.a.
Organic land in conversion (ha)	34 305	129 406
Total No. of organic operators	21 781	29 595
No. producers	20 197	27 808
No. processors	1 495	1 586
No. retailers	n.a.	n.a.
No. exporters	69	34
No. importers	20	30
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

⇒ One of the main characteristics of the Greek OA sector is the high contribution of the permanent grasslands to total organic agricultural area, which was 200 663 ha in 2017.

⇒ The reported area under permanent grasslands corresponds to more than 49 % of the total organic agricultural area.

With a very wide range of organic crops produced, Greece follows the pattern of other EU Med countries (including all categories of cereals, fresh vegetables, pulses, fruits, etc.). Among the arable crops, cereals occupy the largest area, with durum wheat (18 512 ha), barley (5 219 ha) and oats and spring cereal mixtures (8 420 ha). Olives rank first in the category of the permanent crops with more than 50 000 ha, followed by grapes (4 424 ha) and citrus fruit (1 811 ha) (Table 4).

Table 4. Main three arable and permanent crops cultivated, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Durum wheat	18 512	4.5
	Barley	9 413	2.3
	Oats and spring cereal mixtures (mixed grain other than maslin*)	8 420	2.1
Top 3 key permanent crops	Olives	50 085	12.2
	Grapes	4 424	1.1
	Citrus fruits	1 811	0.4
	Species	**No. of head**	**% of the total organic livestock**
Top 3 key livestock categories	Sheep	935 267	57.1
	Goats	375 514	22.9
	Poultry	244 914	14.9

* Mix of wheat and rye grown together.

Similar to plant production, the organic livestock sector is well developed, with almost 1 million sheep as the most numerous species, followed by goats (375 514 head) and poultry (244 914 head). Also, cattle are quite numerous, with a total of 81 425 heads.

In Greece, organic products are sold through various market channels (Table 5-a). Large retail shops, wholesalers and online selling provide a wide array of organic products (processed and

unprocessed goods). While for other more specialized channels, available products categories are listed below:

⇒ Specialized retail shops - fruit, vegetables, cereals, pharmaceutical plants, and dairy products.

⇒ Health shops and pharmacies - mainly unprocessed and/or processed pharmaceutical plants.

⇒ Direct on-farm selling - all types of unprocessed organic products.

Table 5. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	TV ads	X
Specialized retail shops	√	Radio	X
Health shops/pharmacies	√	Newspapers	√
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesaler	√	Public transport	X
On-line selling	√	Social networks	√
		Fairs	√

When it comes to the promotion (Table 5-b), the main channels are newspapers, different types of leafleting, social networks and participation in fairs. Also, promotional seminars are organized addressing different audience groups.

IMPORT AND EXPORT	Greece

Organic products are imported from third countries, according to Regulation (EC) No 1235/2008. They are controlled by the *Regional Centres of Plant Protection and Quality Control* and *Border Inspection Posts* in collaboration with the regional *Directorates for Rural Economy and Veterinary Medicine*. Processed organic products dominate this market segment, while data on value and volumes of imported goods were not available.

As in the case of import, detailed information was not available for the export of organic products. Olive oil, wine, and fresh fruits and vegetables are the main exported product categories.

RESEARCH PROJECTS AND EDUCATION	Greece

One of the main research and education institutions in Greece in the sector of OA is the *Agricultural University of Athens*. Also, different agricultural institutes and research institutions across the country are carrying out research studies related to OA (considering production, processing, market, consumers, etc.) and offering courses on OA.

CHALLENGES/PRIORITIES IDENTIFIED	Greece

Increase in the organic production area and quantities produced was identified as one of the future priorities. Also, it is necessary to accompany this process with the decrease in the production costs, which would attract a higher number of producers to consider conversion to OA.

Lack of trust in organic products at the level of the domestic market is seen as a challenge that needs to be overcome in the future with awareness campaigns and similar actions, including multi-stakeholder participation.

Linkography:

@ www.minagric.gr/index.php/el – Ministry of Rural Development and Food.
@ www.elgo.gr – Greek Agricultural Organization ELGO-DEMETRA.

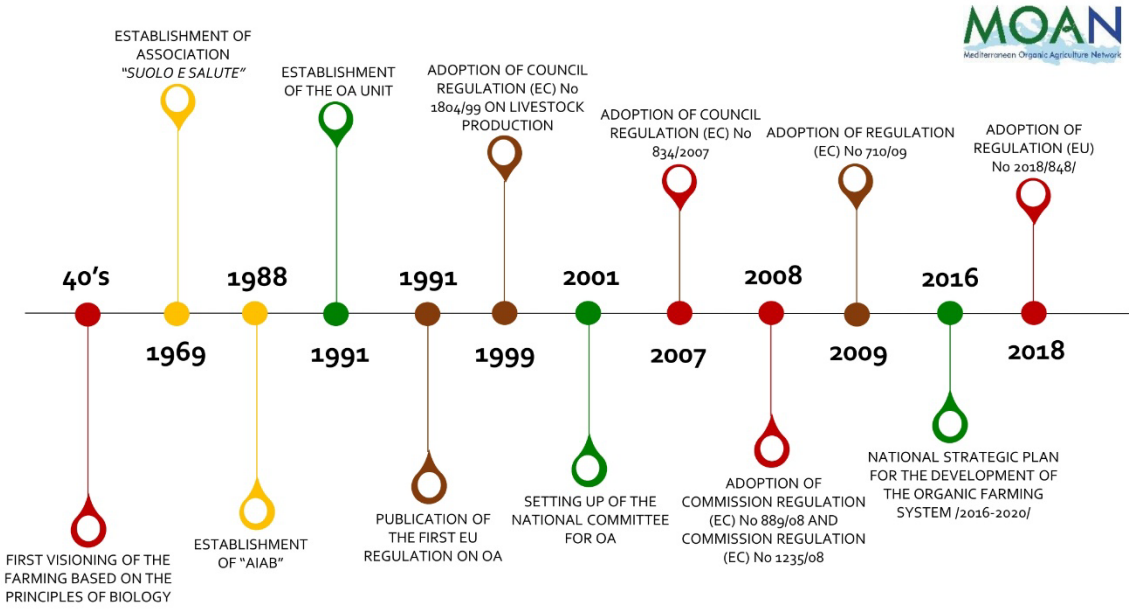
Italy
Country profile

HISTORICAL DEVELOPMENT and REGULATORY FRAMEWORK

Italy

Roberta CAFIERO[1]

Organic agriculture (OA) in Italy started its development well before the enactment, in 1991, of the EU legislation. At the end of the 1940s of the past century, Alfonso Draghetti was already formulating the vision of an integrated *modus operandi* of the farm based on the principles of biology, followed by the foundation, in 1969, of the first association for OA, "*Suolo e Salute*", by Professor Francesco Garofalo, and the contemporary pioneer biodynamic activity of Ivo Totti. Among other pioneers we may recall at the beginning of the 1970s Gino Girolomoni, who founded with a group of farmers the cooperative "*Alce Nero*", the "*Ki Group*" in 1974, Giulia Crespi in 1976 (*Cascine Orsine* in the protected area "*Parco del Ticino*"), "Probios" and the cooperative "*Iris*" in 1978, up to the group of farmers in Sardinia who, in 1982, founded another cooperative, "*S'atra Sardigna*".



All such realities were pushing at their regional level in order to set up proper legislation frameworks, which became reality in some Italian Regions like Lazio, Marche and Tuscany at the end of the 1980s. Development of local rules of production was also accelerated due to the contribution of a new association, founded in 1988, AIAB - *The Italian Association for Organic Farming*, created by a group of organic farmers to represent producers, technicians and consumers wanting to express a different relationship between man and earth, farmers and citizens (infographic above).

The historical development of the regulatory framework of OA described for Italy applies at the same time for the EU. The first EU Regulation on organic production, Council Regulation (EEC) No

[1] Ministry of Agriculture, Food, Forestry Policies and Tourism. Mediterranean Organic Agriculture Network (MOAN) country representative.

2092/91, was published in 1991, while an organic farming unit was established in the same year within the Ministry of Agriculture in Italy. Imports of organic products from third countries were regulated at EU level in 1992, following the adoption of Commission Regulation (EEC) No 94/92. In 1995, the Italian Ministry of Agriculture published the legislative decree No 220/95 implementing the provisions laid down in Regulation (EEC) No 2092/91. Further developments of the EU regulatory framework occurred in 1999, when Council Regulation (EC) No 1804/1999 for organic livestock production was adopted.

The beginning of the 21st century for the Italian organic sector was marked by the setting up of the *National Committee for Organic Agriculture* (Ministerial Decree No 91 982 of October 2001). The period from 2007 to 2009 was very dynamic at EU level, starting with Council Regulation (EC) No 834/2007 on organic production and labeling of organic products (repealing Council Regulation (EEC) No 2092/91). In 2008, detailed rules for the implementation of the above mentioned regulation were published as follows: *i)* Commission Regulation (EC) No 889/2008 laying down detailed rules for the implementation of Regulation (EC) No 834/2007 on organic production and labeling of organic products with regard to organic production, labeling and control and *ii)* Commission Regulation (EC) No 1235/08 - laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries.

Later, in 2009 and 2012 Commission Regulation (EC) No 889/2008 was amended, first considering detailed rules on organic aquaculture animal and seaweed production (Commission Regulation (EC) No 710/2009) and then, considering detailed rules on organic wine production (Commission Implementing Regulation (EU) No 203/2012). More recently, in 2018, the new Regulation (EU) No 2018/848 on organic production and labeling of organic products was adopted, repealing Council Regulation (EC) No 834/2007 and it will apply from January 01st, 2021.

It is important also to highlight that, in 2016, the Italian *Ministry of Agriculture, Forestry, Food and Tourism* (Mipaaft) approved a "*National Strategic Plan for the Development of the Organic Farming System*". Along with the National Strategic Plan another initiative has been carried forward in the recent years by the Italian Parliament: the proposal of a new national law for organic farming, "*Provisions for the protection, development and competitiveness of organic, agri-food and aquaculture production*". The law includes important issues, such the creation of an Italian organic logo, a national plan for organic seeds, the promotion of training in the sector, the aggregation of producers, supply chain agreements to enhance organic production, and the development of organic districts, the last ones important realities that have been developing in different Italian regions. The law proposal is currently under discussion at the Italian Senate.

MAIN SECTOR INSTITUTIONS	Italy

The Ministry of Agriculture, Forestry, Food and Tourism (Mipaaft) is the competent authority for OA in Italy. Within the Mipaaft operates *Central Inspectorate for Quality Protection and Repression of Food Fraud* (ICQRF), as its integral part, in charge of carrying out supervision activities for the control bodies, together with authorities of the regions and autonomous provinces. At the country level control activities for organic operators are delegated to 19 private control bodies. Other key sector institutions and actors are presented in Table 1, and subdivided into public bodies (at the top of the table) and other important value chain actors (at the bottom of the table).

Table 1: Key sector institutions and other value chain actors
Ministry of Health (MDS)
Accredia – National Accreditation body
Council for Agriculture Research and Economics (CREA)
Institute of services for the agricultural and food market (ISMEA)
Italian Information System on Organic Agriculture (SINAB)
Italian Federation for Organic and Biodynamic Farming (FederBio)
National Association of Organic Certification and Control Bodies (Ass.O.Cert.Bio)
Italian Association for Organic Farming (AIAB)
Italian Association for Biodynamic Farming

Since the year 2000, all the institutional data about organic farming in Italy are made available to the wider public at the platform *National Information System on Organic Agriculture* (*Sistema d'Informazione Nazionale sull'Agricoltura Biologica* – SINAB). SINAB represents an example of how all organic farming data (national statistics – area, operators, import, etc.) and sector-related information (legislation, research activities, and sites, etc.) are made easily available to all sector actors, being at the same time an important communication and dissemination tool. Mention also should be made for the *National Agricultural Information System* (*Sistema Informativo Agricolo Nazionale* – SIAN), where the list of all organic operators is available in addition to other datasets related to agriculture.

SUPPORT POLICIES	Italy

Aforementioned "*National Strategic Plan for the Development of the Organic Farming System*" for the period 2016-2020 (Table 2) is focused on 10 specific actions. Among these, we can quote the development of OA in the context of Rural Development Plans, institutional communication, green public procurement, training and information activities, revision of the control rules, controls on imports and a strategy for research and innovation in organic farming.

Several actions were developed during the last years and are still underway but, most of all, the goals set by the Plan to increase the area under organic farming by 50% in the period 2016-2020 and to improve the sector's turnover by 30% were actually reached at the end of 2018, well before 2020.

⇒ The plan is the result of an activity carried out by the Italian Ministry of Agriculture (Mipaaft) along with all the sector players. It includes a set of actions to be completed by 2020 in order to respond to the needs of the national OA sector.

⇒ Additional support for OA is available through the *Rural Development Plans*.

Table 2. Details on National Strategic Plan for Organic Agriculture	
English name	Italian Strategic Plan for the Development of the Organic Farming System
Full name in national language	*Piano Strategico Nazionale per lo Sviluppo del Sistema Biologico*
Running from – to:	2016-2020
Key targets:	- 50% increase in the organic area; - 30% increase in the organic market; - Improvement of control on import from third countries; - Drafting of a national plan for research and innovation in OA.
Financial resources	EU funds and MIPAAFT

STATISTICS — Italy

Italy ranks second among the Mediterranean countries (after Spain), with a total organic agricultural area of more than 1.9 million ha in 2017 (Table 3) and is also one of the world's top ten producing countries. Moreover, within the MOAN member countries, it takes the lead in the organic share of the total agricultural land (15.4 %).

When looking at the trends, it is worth noting that economically significant crops (and characteristics of the Mediterranean area) such as cereals and olives, reached a cultivated organic area of 305 871 and 235 741 ha respectively in 2017. Compared to 2010, these values grew by 57 % and 68 % respectively, with an increase in cultivated area of 110 897 ha and 94 993 respectively.

Table 3. Key data	2016	2017
Organic agricultural area (ha)	1 796 363	1 908 653
Organic share of total agricultural land (%)	14.5	15.4
Organic forest/wild collection (ha)	n.a.	n.a.
Organic land in conversion (ha)	594 888	536 314
Total No. of organic operators	72 154	75 873
No. producers	55 567	57 370
No. processors	16 578	18 092
No. retailers	n.a.	n.a.
No. exporters	n.a.	n.a.
No. importers	363	411
Organic market (€)	3 267 MM	3 552 MM
Share of the total market (%)	2.8	3.0

*n.a. – not available

⇒ Italy is one of the few Mediterranean countries where data related to the organic market were available.

⇒ The total value of organic market in Italy in 2017 exceeded EUR 3 000 million.

⇒ The current value of the organic market corresponds to 3 % of the total national market

The total number of organic operators rose by more than 3 000 from 2016 to 2017, including all categories of organic operators (producers, processors, and importers). The highest number of processors is represented by olive oil millers, followed by jams and preserves processors, grain millers, wine processors, etc.

As expected for the "*pasta*" country, cereals are the most produced arable crop, with more than 300 000 hectares in 2017 as specified above (16 % of the total organic agricultural area), followed by vegetables (55 056 ha) and protein crops (49 730 ha) (Table 4).

Table 4. Main three arable and permanent crops cultivated, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Cereals	305 871	16.0
	Vegetables	55 056	2.9
	Protein crops	49 730	2.6
Top 3 key permanent crops	Olives	235 741	12.3
	Vineyards	105 384	5.5
	Nuts	47 452	2.5
	Species	**N. of heads**	**% of the total organic livestock**
Top 3 key livestock categories	Poultry	2 903 532	67.0
	Sheep	736 502	17.0
	Bovine animals	336 278	7.7

As for most Mediterranean countries, olive trees account for the highest production area among permanent crops, totalling 235 741 ha in 2017 as highlighted above. Grapevine production comes second with more than 100 000 hectares and nuts close the group of the top 3 key permanent crops, with 47 452 ha.

Production of organic poultry in Italy reached almost 3 million heads in 2017. Sheep were the second most numerous livestock category, with a total of 736 502 heads, followed by bovine animals (336 278 heads). The good level of development achieved by organic livestock in Italy is also confirmed by the high population of goats (115 590 heads), pigs (61 242 heads) and even equines with 15 293 heads. Moreover, organic beekeeping is well established with a total of 171 094 beehives in 2017.

MARKET AND PROMOTION — Italy

The domestic market is characterized by a constant growth and the presence of all marketing channels listed in Table 5-a. In addition to the listed channels, where different categories of products can be found (all types of fresh and processed food), mention should be made of farmers' markets for the sale of vegetables, fruit, eggs, dairy products, honey, etc.

Century old olive trees

Cereals production near to the harvesting time

Fruit and vegetables are the bestselling product categories, representing together more than 40 % of the total organic market in Italy. Furthermore, a high percentage of the market share is intended for cereal by-products (16 %), milk and dairy products (13 %) and eggs (5 %). The highest proportion of organic products (over 60 %) in Italy is sold through large retail channels (hypermarkets and supermarkets).

Table 5. Marketing and Promotion channels

a) Marketing channels	
Large Retail stores (Hypermarkets, Supermarkets)	√
Specialized retail shops	√
Health shops/pharmacies	√
Direct on-farm selling	√
Wholesalers	√
On-line selling	√

b) Promotion channels	
TV ads	√
Radio	√
Newspapers	√
Leafleting/newsletter/brochures	√
Public transport	X
Social networks	√
Fairs	√

The presence of all marketing channels is well supported by promotion. As indicated in Table 5-b, all promotion channels except for public transport are developed in Italy. Also, street markets are present and regarded as important for organic sector promotion. Use of social media concerning information on OA has been very recently developed by CIHEAM Bari, in cooperation with Mipaaft, and in the context of a specific communication project. Its aim is mainly to keep consumers aware of the peculiarities of organic productions, interesting events, the news of the sector, also from the institutional point of view, and this will add to the initiatives of private actors who are very active in the same context.

Highlights /Best practices

The Italian Ministry of Agriculture is currently backing an important initiative to promote organic food in school canteens. A total amount of EUR 44 million will be granted to support this action during a 3-year period, with a view to providing "organic" meals to children at a lower cost for the families and teach them about the benefits of OA. The Ministerial decree No 14771 of December 18th, 2017 laid down the minimum requirements for the definition of "organic school canteens", thus paving the way for their implementation.

IMPORT AND EXPORT — Italy

The value of imported organic goods in Italy equalled around EUR 170 million in 2017. Industrial crops were the most imported organic products (mostly soya and soya bean coming from China and sunflowers seeds from Turkey); followed by cereals (rice mainly from India and Pakistan; and wheat from Turkey), whereas fruits rank as third.

As far as export is concerned, relevant data and information were not available.

RESEARCH PROJECTS AND EDUCATION — Italy

The list of research projects in the field of OA in Italy is available on the SINAB platform. Among the several ongoing and recently ended projects, emphasis should be laid on the following three, all funded by Mipaaft:

⇒ DIMECOBIO – Project, for the period 2014-2020 and implemented, *inter alia*, in partnership with ISMEA and CIHEAM Bari. The project aims to provide a detailed analysis of the OA sector economics in Italy and to define and update yearly the sector statistics (i.e. area, number of operators, yield, costs, prices, etc.), based on reliable sources and according to standardized methods. Information resulting from the project activities will help fine-tune the strategic choices for the implementation of the various sectoral policies.

⇒ BIOFOSF – The main objective of the project was to determine whether the residual phosphites, sometimes found in organic fruit and vegetable products, are derived from phosphates present in a number of organic fertilizers (produced from raw materials of animal origin allowed for

use in OA), or if their occurrence is related to the illegal use of phosphites/ fosetyl-aluminium based plant protection products or to the presence of reduced forms of phosphorus in nature. The project was coordinated by CREA, for the period 2016-2018, and it included three dimensions: legislation, research and dissemination.

⇒ ALT.RAMEINBIO – An already ended project (run from 2015 to 2017), but still interesting due to its focus on copper use in OA. The project aimed to explore the possible alternative solutions (compounds and formulations) for copper use in OA, but also to develop strategies and technologies for the reduction of the currently used amounts.

Organic agriculture programmes are offered individually or as part of other agricultural curricula in several Italian Universities. As regards more technically focused education, some short courses were delivered during the period 2018-2019 at the *Università Politecnica delle Marche* – a Training course in management of conversion to organic and biodynamic agricultural production, and at the *Università degli Studi di Urbino Carlo Bo* – Models, policies and strategies for the development of organic farming, both financed by public funds.

CHALLENGES/PRIORITIES IDENTIFIED	Italy

The challenges and priorities identified are in line with the objectives and actions of the *National Strategic Plan for OA,* aimed at sustaining the organic sector through institutional communication, green public procurement, training, transparency, research, and innovation. All the actions listed should lead to increase the organic production area up to 2 100 000 ha and the market value up to EUR 5 billion by 2020, mainly by strengthening the supply chain relationships.

Organic vegetable production in Italy

Linkography:

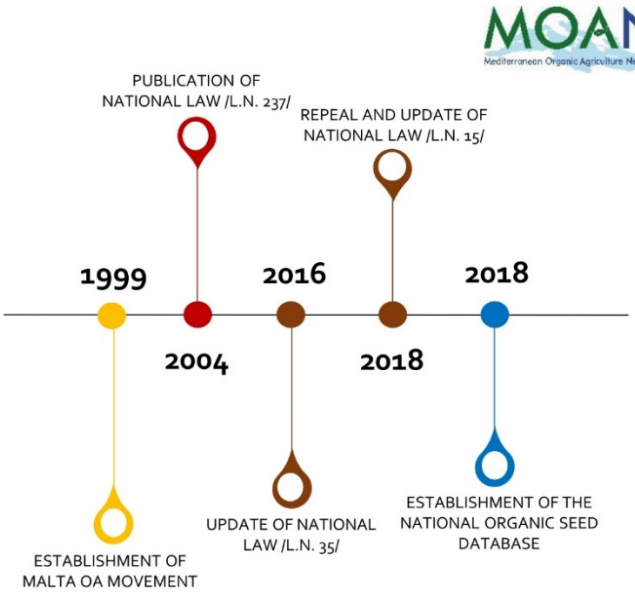
- @ www.politicheagricole.it – Ministry of Agriculture, Forestry, Food and Tourism.
- @ www.crea.gov.it – Council for Agriculture Research and Economics.
- @ www.sinab.it – National Information System on Organic Agriculture.
- @ www.accredia.it/en/ – National Accreditation Body.
- @ www.feder.bio – Italian Federation for Organic and Biodynamic Farming.
- @ www.assocertbio.it – National Association of Organic Certification and Control Bodies.
- @ www.aiab.it – Italian Association for Organic Farming.

Malta
Country profile

HISTORICAL DEVELOPMENT | Malta

Marcelle AGIUS[1]

Organic production in Malta has not been historically dynamic or full of events, but it is steadily advancing. As regards the first milestone, the *Malta Organic Agriculture Movement* (MOAM) was established in 1999. As for its regulatory framework, Malta published its first national law on OA in 2004. This law was recently updated twice (in 2016 and in 2018) (infographic below).



In 2018, in line with the EU regulation, Malta established the national organic seed database with the objective to draw up a list of organically produced seeds and vegetative propagation materials that are available in Malta.

MAIN SECTOR INSTITUTIONS | Malta

The competent authority for OA is the *Agriculture Directorate* within the *Rural Development Department*, operating under the *Ministry for the Environment, Sustainable Development, and Climate Change*. Given the sector's small size, the number of key actors is also limited. Thus, besides the Ministry, the MOAM plays an important role by supporting all initiatives undertaken for plant and livestock production that are environmentally friendly and provide food without chemical residues. It brings together farmers, consumers, technical advisors etc. working jointly for the promotion of OA and for its better positioning within the Maltese agricultural sector. Concerning the last key sector actor, mention should be made of the *Malta Competition and Consumer Affairs Authority* (MCCAA) which acts as Control Authority to carry out certification and controls on organic

[1] Ministry for the Environment, Sustainable Development and Climate Change - Rural Development Department. Agriculture Directorate – Mediterranean Organic Agriculture Network (MOAN) country representative.

operations. MCCAA is also in charge of consumer protection, market surveillance, metrology standards, etc.

REGULATORY FRAMEWORK AND SUPPORT POLICIES — Malta

Since Malta is a member country of the EU, the regulatory framework in place consists of the EU legislation and the implementing rules on OA. A national law was published in 2004 and recently updated (including repeal, update, and publication in 2018) for further consolidation of the OA control system.

Data reported in Table 1 are related to the recently published *Subsidiary Legislation* 427.93 (*Legal Notice No*. 15 of 2018), a national legislation providing the implementation of provisions of EU regulations on OA production, processing, retail, labelling, control, and import from third countries

Table 1. National legislation

Date of publication	January 12, 2018
Entry into force (year)	2018
Number	Subsidiary Legislation 427.93 (L.N. 15 of 2018)
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	√
- **Processed Food/Feed**	√
- **Labelling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	/
Equivalent with EU	Yes

As part of the *Malta Rural Development Programme 2014 – 2020*, support to OA is provided under the two following measures:

⇒ Measure 11 – Payments for conversion and maintenance to/of organic farming practices;

⇒ Measure 3 – Support for participation in quality schemes.

STATISTICS — Malta

Taking into consideration the limitations related to the field size and, in general, the overall size of the utilized agricultural area (10 254 ha of UAA in the country), the growth recorded in the organic agricultural area for Malta, from 24 ha in 2016 to 43 ha in 2017, is considered to be significant (Table 2). Moreover, the total number of organic operators increased from 37 to 45 during the same period.

What makes the Maltese statistics interesting, unlike all other Mediterranean countries, is that retailers are the most numerous group of operators. This is explained by and is an evidence of the consumer growing interest in OA, leading to an increased interest by operators to get certified as organic retailers.

While the category of organic producers remained almost the same, processors decreased from 10 in 2016 to only 5 in 2017. Three of them are jams and preserves processors, one is an olive oil miller and one is a wine producer. There are no organic exporters in Malta, whereas the number of organic importers in 2017 totalled 12. These figures clearly indicate the existing demand on the local market.

Table 2. Key data	2016	2017
Organic agricultural area (ha)	24	43
Organic share of total agricultural land (%)	0.2	0.4
Organic forest/wild collection (ha)	0	0
Organic land in conversion (ha)	3	4
Total No. of organic operators	37	45
No. producers	14	13
No. processors	10	5
No. retailers	6	18
No. exporters	0	0
No. importers	13	12
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

⇒ In addition to the crops listed in Table 3, it is worth mentioning that Malta also produces fresh vegetables (including melons and strawberries over an area of approximately 5 ha).

⇒ Smaller production areas are devoted to cultivation of dry pulses and protein crops; aromatic, medicinal and culinary plants; pome fruits etc.

Grapes and olives are the two leading crops in the Maltese OA sector, covering 9.3 and 9.1 ha respectively in 2017. This area totally corresponds to more than 40 % of the total organic area in Malta. As regards other permanent crops, 0.6 ha is under citrus production (Table 3).

Arable crops, in general, occupy a smaller area, with barley ranking first (2.6 ha), followed by common wheat and spelt (2.3 ha) and potatoes (1.0 ha). Organic livestock and beekeeping are not currently present in Malta.

Table 3. Main three arable and permanent crops, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Barley	2.6	6.0
	Common wheat and spelt	2.3	5.3
	Potatoes	1.0	2.3
Top 3 key permanent crops	Grapes	9.3	21.6
	Olives	9.1	21.2
	Citrus	0.6	1.4

MARKET AND PROMOTION — Malta

Malta offers a full range of marketing channels (Table 4) for distribution of organic products, indicating, again, the high potential for future development of the local market. When considering the types of products sold, fresh fruit and vegetables and processed food prevail.

Promotion channels currently used for organic products are TV ads, leafleting and participation in fairs (Table 4-b). There is no Information available about volumes and value of organic products sold on the local market.

Table 4. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	TV ads	√
Specialty retail shops	√	Radio	X
Health shops/pharmacies	√	Newspapers	X
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesalers	√	Public transports	X
On-line selling	√	Social networks	X
		Fairs	√

IMPORT AND EXPORT — Malta

Organic products are imported to Malta in compliance with EU regulations, considering third countries (i.e. in 2017, there were no organic imports from third countries). There is no data currently available about the volume and value of imported organic goods from the EU. However, it is known that processed food dominates organic imports from the EU.

To date no organic product has been exported from Malta.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Malta

The only activity identified in the field of projects related to OA (cooperation, research or education) was Malta's participation in the training "*Organic farming scheme*", funded by the project "*Better Training for Safer Food Initiative of the European Union*" (BTSF) in 2017.

The objective of the training was to improve the knowledge of the participants coming from the EU member states and third countries on the control requirements for organic products while exchanging the best practices for control activities and procedures.

CHALLENGES/PRIORITIES IDENTIFIED — Malta

As indicated earlier, small land parcels and land fragmentation (and therefore, proximity to conventional farms) are the main challenges for the OA sector in Malta. A solution could be granting special status to some areas, e.g. protected areas or small 'bio-districts', where groups of producers and other operators act together and possibly have access to group certification. With the new EU regulation (starting from January 1, 2021) group certification will be regulated and allowed for all EU member states, thus offering an opportunity to small farmers in Malta.

One of the priorities in the future is to increase awareness about OA among all members of the society, and not only agricultural producers, aiming at increasing local demand for organic products.

Linkography:

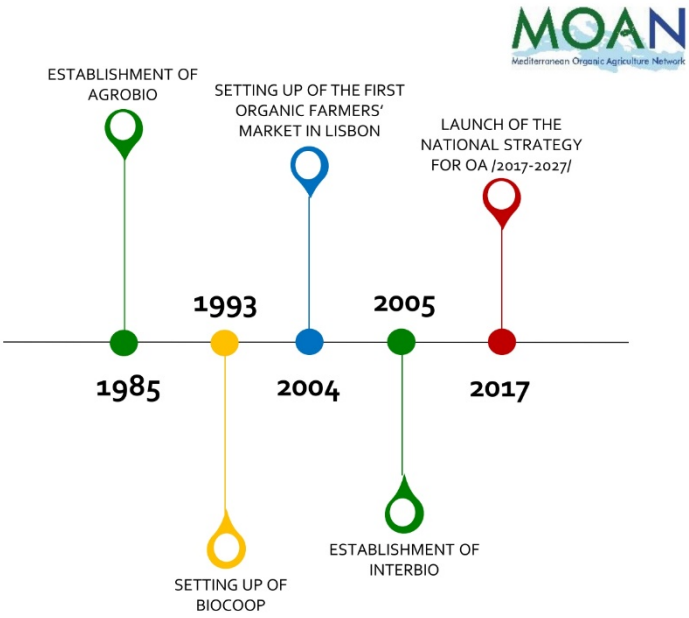
- www.ad.gov.mt/– Directorate of Agriculture, Rural Development, Ministry for the Environment, Sustainable Development and Climate Change.
- www.mccaa.org.mt – Malta Competition and Consumer Affairs Authority.
- www.facebook.com/maltaorganic/ – Malta Organic Agriculture Movement.

Portugal
Country profile

HISTORICAL DEVELOPMENT | PORTUGAL

Cristina HAGATONG[1]

The *Portuguese Association of Organic Agriculture* (AGROBIO) was established in the mid-eighties as a pioneering institution for the organic agriculture (OA) sector in Portugal. Almost ten years later, the first cooperative of organic consumers was founded in Lisbon (BIOCOOP), with the objective to boost the commercialization of organic products. This market segment was further enhanced in 2004 when the first organic farmers' market was open in Lisbon.



In 2005, the inter-professional OA organization INTERBIO was established, as a non-profit organization aiming to represent the interests of organic operators. The most recent milestone, with a significant impact on the future of OA in Portugal, is the *National Strategy for Organic Agriculture* /2017-2027/ adopted in 2017. Moreover, the national observatory on organic production and the Portuguese federation of OA were established in the same year.

MAIN SECTOR INSTITUTIONS | PORTUGAL

The *Directorate-General for Agriculture and Rural Development* (DGADR) is the competent authority for OA in Portugal, with its *Quality and Genetic Resources Unit*, operating under the *Ministry of Agriculture, Forest and Rural Development*. The DGADR is a state service responsible for the implementation and coordination of the control system for quality schemes, including organic production. Also, the control of organic products on the market, including labelling, is performed by the *Food and Economic Security Authority* (ASAE - *Autoridade de Segurança Alimentar e Económica*).

[1] Ministry of Agriculture, Forest and Rural Development - Directorate-General for Agriculture and Rural Development. Mediterranean Organic Agriculture Network (MOAN) country representative.

As for non-state institutions, AGROBIO remains one of the sector key actors. AGROBIO is the first national organic farming organization, bringing together consumers, producers, processors, retailers, technicians, and students. Moreover, most Portuguese organic farmers are members of one of the several associations which provide technical support and advice on organic cropping practices and organise field visits.

REGULATORY FRAMEWORK AND SUPPORT POLICIES — Portugal

Since Portugal is a member state of the European Union, the OA sector is regulated by the EU legislation and implementing rules. The recently adopted National Strategy for Organic Farming 2017-2027 is the most important document for the sector and it sets out a number of specific objectives for future development (Table 1). The focus is placed on area increase, processing capacity building, and development of local market and networks for experimental activities in OA. Support measures are also provided by the *"Rural Development Programme 2014-2020"* concerning area-based payments which include conversion period and maintenance of OA.

Besides area-based payments, the national rural development programme also lays down measures that include indirect support in line with OA:

⇒ Measure 3 – Enhancement of agricultural production.

⇒ Measure 7 – Agriculture and natural resources.

Table 1. Details on National Strategy for Organic Agriculture

English name	National strategy for organic farming
Full name in national language	*Estratégia nacional para a agricultura biológica*
Running from – to:	2017-2027
3 key targets:	- Duplicate the area under OA and the internal processing capacity; - Increase the consumption of organic products; - Create an experimentation network.
Financial resources	Budget of the organizations and institutions involved in implementation.

STATISTICS — Portugal

Portugal ranks fifth among the EU Med countries (after Spain, Italy, France, and Greece), with a total organic agricultural area of 253 761 ha in 2017. Compared to the previous year, the area under organic rose by 8 709 ha, while the total number of operators increased by almost 1 000. The increase in the number of the producers was from 4 285 in 2016 to 4 674 in 2017, and for the processors from 611 to 760, in the same period (Table 2).

Table 2. Key data	2016	2017
Organic agricultural area (ha)	245 052	253 761
Organic share of total agricultural land (%)	6.7	6.9
Organic forest/wild collection (ha)	0	0
Organic land in conversion (ha)	73 308	35 871
Total No. of organic operators	4 672	5 654
No. producers	4 285	4 674
No. processors	611	760
No. retailers	149	195
No. exporters	n.a.	n.a.
No. importers	11	22
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

⇒ The sector growth was also confirmed by the increase in the number of retailers and importers.

⇒ Data were not available for the number of exporters, thus indicating the shortcomings in the data collection system. However, exporting activities are present, since Portugal is known to export organic olives and wine.

Overall, organic production in Portugal is highly diversified, with a wide array of arable and permanent crops. Fodder crops occupy the largest area among arable crops (35 424 ha), followed by cereals (5 887 ha) and horticultural crops (2 305 ha) (Table 3). It is worth noting that in 2017, fallow land covered an area of 6 041 ha.

For most Mediterranean countries, olive trees take the lead among the permanent crops but in Portugal nuts occupy the largest area (24 435 ha), accounting for almost 10% of the total organic agricultural area. Olive trees come second with 21 634 ha, followed by grapes (3 504 ha).

Table 3. Main three arable and permanent crops cultivated, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Plants harvested green from arable land (fodder crops)	35 424	13.9
	Cereals for grain production (including seeds)	5 887	2.3
	Horticultural crops (including melons and strawberries)	2 305	0.9
Top 3 key permanent crops	Nuts	24 435	9.6
	Olives	21 634	8.5
	Grapes	3 504	1.4
	Species	**No. of heads**	**% of the total organic livestock**
Top 3 key livestock categories	Sheep	99 332	33.4
	Bovine animals	95 245	32.0
	Poultry	48 160	16.2

Animal husbandry sector is also developed, with more than 90 000 heads of sheep and bovine animals, while poultry is the third with 48 160 heads. Goat and pig production is also present, with 6 475 and 1 157 heads, respectively.

MARKET AND PROMOTION — Portugal

In Portugal, all organic marketing channels are present, where all product categories are sold, while health shops and pharmacies only sell food supplements. Similarly, all promotional channels, except for public transport, are used for organic products in Portugal (Table 4 – a and b).

Table 4. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	**TV ads**	√
Specialized retail shops	√	**Radio**	√
Health shops/pharmacies	√	**Newspapers**	√
Direct on-farm selling	√	**Leafleting/newsletter/brochures**	√
Wholesalers	√	**Public transport**	X
On-line selling	√	**Social networks**	√
		Fairs	√

Detailed data on the domestic market were not available because at present there is not an organic market data collection system. However, over the past few years, there has been a strong demand for organic foods, leading to an increased number of specialized organic food stores, organic farmers' markets and also to a wider presence of organic products in conventional supermarkets and food stores.

IMPORT AND EXPORT	Portugal

Imported organic products are released by the customs authorities only if the specific import requirements for such products are fulfilled. When the importer (or its representative) informs the customs services, the *Regional Directorates for Agriculture and Fisheries* (DRAP) and border inspection points are entrusted with the documental checks before allowing free circulation of the goods. The main importers are other EU member countries, as Spain, France, Germany, Italy etc.

As already mentioned in the statistic section, olive and wine are the main exported products and they are intended for the EU market. Additional data on export were not available.

RESEARCH PROJECTS AND EDUCATION	Portugal

Research on organic farming is carried out by several regional and national agricultural bodies, agricultural high schools and universities (e.g. *Instituto Politécnico de Viana do Castelo*, *Escola Superior Agrária Politécnico de Coimbra*). AGROBIO and numerous regional organic farmers associations all provide technical support. Several public universities and agricultural higher schools offer education in organic agriculture as a mandatory or optional module. Moreover, training courses on organic farming for technical advisors, farmers, specialized short courses and workshops for the general public are provided by organic farming organizations.

CHALLENGES/PRIORITIES IDENTIFIED	Portugal

The challenges and priorities identified in the *National Strategy for Organic Farming 2017-2027*, besides those listed in the Table 1, include an increased availability and improved efficacy of the data collection system regarding local market, import and export of organic products.

Linkography:

- @ www.dgadr.gov.pt – Directorate-General for Agriculture and Rural Development.
- @ www.agrobio.pt – Portuguese Association of Organic Agriculture.

MOAN
Mediterranean Organic Agriculture Network

Southern and Eastern Mediterranean (SEM) Countries

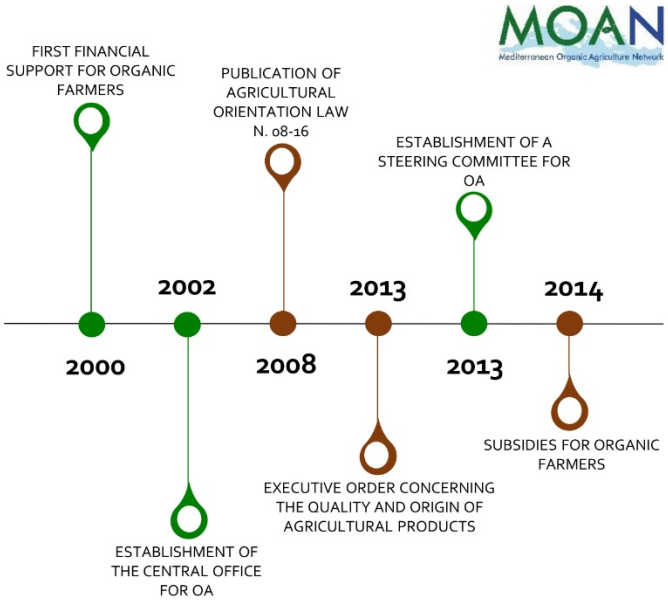
Algeria, Egypt, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia

Algeria
Country profile

HISTORICAL DEVELOPMENT — Algeria

Hadjira Houria ABDELLAOUI[1]

Among the SEM countries, Algeria reports the slowest pace of organic agriculture (OA) development. The first financial support to organic farmers was provided in 2000; in 2002, the central office for OA was established within the Ministry of Agriculture (infographic below).



As to regulatory aspects, the first law including segments related to OA was published in 2008, followed by an executive order in 2013. In the same year, the steering committee for OA was founded, while the second set of subsidies for farmers was granted in 2014. After this period, additional information is not available.

MAIN SECTOR INSTITUTIONS — Algeria

The Ministry of Agriculture, Rural Development and Fisheries (MADRP) is the competent authority and the only state actor in the sector of OA in Algeria. The national unit for OA is not operational, but MADRP is collaborating with agricultural engineers trained in organic farming to open the discussion on how to facilitate the sector development. Among other state actors involved in this sector, mention shall be made of the *Technical Institute of Fruit Trees and Vines* (ITAFV) and *The National Wine Products Marketing Office* (ONCV).

Private actors established their way of operating, without coherence with national institutions. Among them, leading actors are private companies involved in the production of organic palm dates, as "*Bionoor*" and "*Biodattes Algérie*". Furthermore, mention should be made of the *Algerian Association of Date Producers*.

[1] Ministry of Agriculture and Rural Development and Fisheries. Mediterranean Organic Agriculture Network (MOAN) country representative.

From the first support initiatives to OA in 2000 till now, the expected progress in the field of legislation and policies has not been achieved. Despite the potential for OA development, due to the prevalence of extensive agricultural production, efforts made at the institutional level were not sufficient to establish any legal framework for the sector.

Considering the foregoing, OA sector in Algeria is ruled by the Agricultural Orientation Law No. 08-16 of 3 August 2008 and the Decree No. 13-260 of 7 July 2013. The first one defines the general framework of the system recognizing the quality of agricultural products by the signs related to their origin, other agricultural labels and the products of the organic farming. Details for the decree content are not available.

In the framework of the Algerian national fund for agricultural development ("*Fond national de développement agricole*"), support policies for OA exist but they are not clearly defined. The only information available indicates that two types of support are provided, one for soil preparation and the second for organic inputs (in the form of subsidies). However, it is interesting to note that this kind of support is still available for organic operators.

The steering committee for OA was established in 2013 by MADRP, with the objective of adopting the strategy for the promotion and popularization of the organic production methods at the regulatory and technical level. Also, the role planned for the steering committee was to define a roadmap for the sector development. To date, there is no information available on whether the goals set have been achieved.

Key data on OA sector in Algeria are presented in Table 1. The total organic agricultural area of 1 400 ha remained the same for the period 2016-2017, representing only 0.02 % of the total utilized agricultural area.

Table 1. Key data	2016	2017
Organic agricultural area (ha)	1 400	1 400
Organic share of total agricultural land (%)	n.a	0.02
Organic forest/wild collection (ha)	n.a.	n.a.
Organic land in conversion (ha)	628	628
Total No. of organic operators	78	78
No. producers	76	76
No. processors	3	3
No. retailers	n.a.	n.a.
No. exporters	2	2
No. importers	1	1
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

* n.a. – not available

Organic dates from Algeria

Data, in general, do not differ for the two years presented. Thus, the total number of organic operators was 78 in both years, being almost all of them producers. Also, the number of processors (3), exporters (2) and importers (1) remained the same.

Within the crop categories, data were only available for permanent crops. The largest area corresponds to the cultivation of organic olives (628 ha), followed by palm dates (564 ha) and vineyards (208 ha) (Table 2). In general, the listed permanent crops are the only ones to be grown with the organic production method.

Table 2. Main three permanent crops cultivated (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key permanent crops	Olives	628	44.9
	Palm dates	564	40.3
	Vineyards	208	14.8

MARKET AND PROMOTION — Algeria

Data on the domestic market, in the form of marketing and promotion channels present, are reported in Table 3. Information available indicates that part of date production and the majority of organic wine and olive oil is sold on the local market. In the case of wine, marketing channels are also hotels and restaurants.

Table 3. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	**TV ads**	√
Specialized retail shops	√	**Radio**	√
Health shops/pharmacies	X	**Newspapers**	√
Direct on-farm selling	X	**Leafleting/newsletter/brochures**	√
Wholesaler	X	**Public transport**	X
On-line selling	√	**Social networks**	√
		Fairs	X

Several promotion channels for OA are active in Algeria. One of the forms mostly used for TV promotion is reportage. Unfortunately, participation in fairs was not reported and this is the segment that should be improved in the future.

IMPORT AND EXPORT — Algeria

As for the market and promotion category, detailed data were not available on the import and export of organic products. In Algeria, it is very common that private companies act as farmers/ contractors, taking in charge most of the production factors (inputs, certification, logistics, etc.) and eventually the export of products.

Data on product categories are not available, except as reported above that the majority of palm dates production is exported, mainly to France and Germany.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Algeria

From the information available, it was possible to get just a partial overview of the sector of research and education on OA in Algeria. Thus, one of the initiatives performed was designed to provide the technical assistance for the promotion of organic olive oil in Algeria; it was done in cooperation with the *Food and Agriculture Organization of the United Nations* (FAO), for the period July 2017 – November 2018. Also, OA was part of the Twinning project (financed by the European

Commission) whose objective was to assist and promote OA sector through the improved methods of control, labeling, market organization, and support to farmers' organizations.

At present, the project entitled "Bioactive compounds from *Olea europaea* - investigation and application in food, cosmetic and pharmaceutical industry" is being implemented in cooperation with the European Union and the *French National Institute for Agricultural Research* (INRA). Additional details are not available.

As far as we know, there are no university programs offering courses on OA as part of education curricula. Whereas, ITAFV and *Direction for Extension and Research Training* (within the MADRP) are active in the organization of the courses to the farmers and technical staff.

CHALLENGES/PRIORITIES IDENTIFIED	Algeria

Higher involvement of state institutions within the sector is needed, to serve as a positive signal for present organic operators, but also to increase the interest of conventional producers in OA. Moreover, a better coordination with the private sector could bring an added value and spread their experience among other interested operators.

However, these actions could be eased by the development of the national regulatory framework. Together with regulations, there is a need to propose a national action plan and to establish a national committee for OA. Also, the data collection system requires significant changes and the establishment of a database at national level.

Linkography:

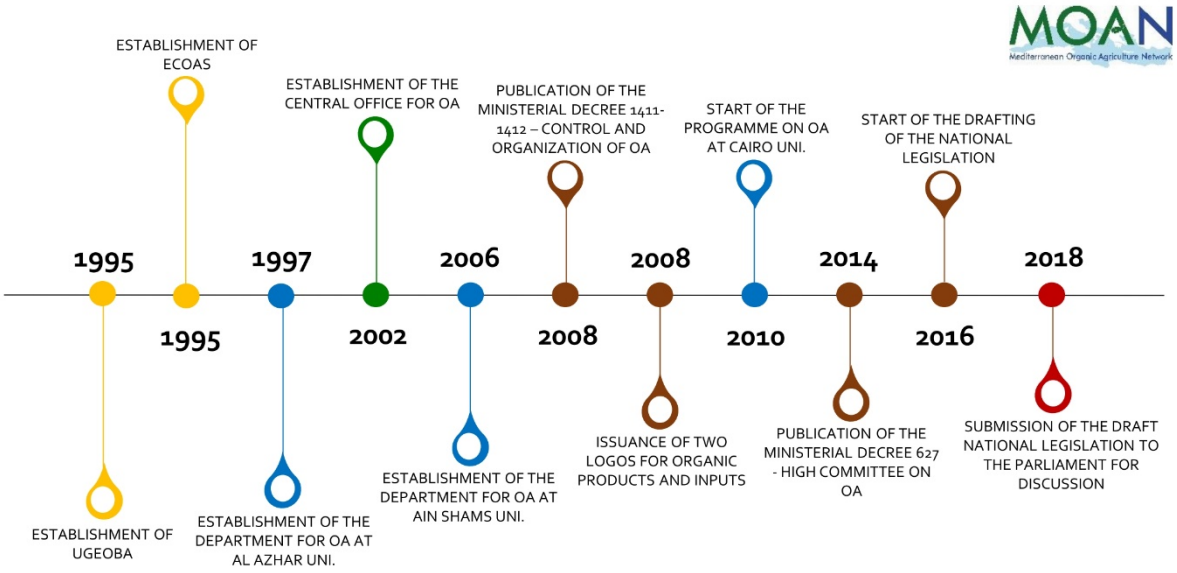
- www.minagri.dz – Ministry of Agriculture, Rural Development and Fisheries.
- www.itafv.dz – Technical Institute of Fruit Trees and Vines.
- www.dgf.org.dz/fr – Directorate-General for Forestry.
- www.gvapro-dz.com – *Groupe Valorisation des produits agricoles* (GVAPRO).
- www.biodattes.com – "*Biodattes*" – Private operator (palm dates production and export).
- www.bionoor.com – "*Bionoor*" – Private operator (production, export).

Egypt
Country profile

HISTORICAL DEVELOPMENT | Egypt

Atef Abdel Azziz RAGAB[1]

In 1995 two major initiatives had a great impact on organic agriculture (OA) in Egypt: the establishment of a producers' association, the *Union of Growers and Exporters of Organic and Biodynamic Agriculture* (UGEOBA), and the formation of the *Egyptian Centre of Organic Agriculture Society* (ECOAS) as National Control Body. Some important actions for the sector growth are presented in the infographic below. Among the MOAN member countries, Egypt is the only one with two logos (both issued in 2008): one for OA products and one for OA inputs.



Besides the information illustrated graphically, we should remark that in 2002 the *Central Laboratory of Organic Agriculture* (CLOA) was appointed as the unit responsible for all affairs related to the organic sector. Among its recent activities, it is interesting to note that in 2017 CLOA started a programme for the production of seeds for OA in cooperation with the *Chinese Academy for Science of flowers and horticulture.*

MAIN SECTOR INSTITUTIONS | Egypt

Among the key sector institutions, *the Ministry of Agriculture and Land Reclamation* (MALR) and CLOA are the competent state authorities, followed by the *Egyptian Accreditation Council* (EGAC), the *Export Development Authority* (EDA) and the *Agriculture Research Centre* (ARC). Several associations are operating at the country level, in addition to an important value chain's actors, including the *Egyptian Bio-dynamic Association* (EBDA), the *Fayoum Agro-Organic Development Association* (FAODA), the *Farmers Development Association* (FDA) etc. In the private sector, *SEKEM* is seen as the key actor.

[1] Central Lab of Organic Agriculture. Mediterranean Organic Agriculture Network (MOAN) country representative.

REGULATORY FRAMEWORK AND SUPPORT POLICIES — Egypt

The draft of the Egyptian law on organic agriculture was issued in 2017 and officially submitted to the Parliament for discussion in May 2018. Before this important step, it obtained prior approval after review by the legislative council of the Egyptian government, and was then discussed in a public consultation. The drafting process was undertaken in the framework of CIHEAM Bari Master of Science programme in "*Mediterranean Organic Agriculture*" (AY 2015/2016), in collaboration with CLOA and ARC, under the umbrella of the Egyptian Ministry of Agriculture, based on the ministerial decrees No. 1411–1412/2008. Additional details on the national regulatory framework for OA are presented in Table 1, including some of the decrees published.

Table 1. Details on the national regulatory framework

Draft	The draft contains an extensive list of definitions, organic production and processing standards, and the list of allowed and prohibited substances. It also contains labeling, certification, accreditation, enforcement, and testing requirements. It covers all agricultural products labeled and sold as "organic" or "organically produced". The rule covers organic vegetable growers, orchards, livestock producers, ranchers, processors, handlers, retailers and mass catering, along with any other activity that may affect the final organic products.
Draft submitted to Parliament	The draft has been discussed in three sessions and the discussions are still under way, with the objective to be finalised soon.
Decrees	- The ministerial decree No. 1952/2002 to appoint the Central Laboratory of Organic agriculture as the unit responsible for all affairs related to different organic production activities. - The ministerial decree No. 1411 – 1412/2008 to control and organise organic agriculture in Egypt. - The ministerial decree No. 627/ 2014 and No. 1339/2018 for the High Committee of Bio-control and Organic Agriculture.

Until the approval and application of the Egyptian organic agriculture law, support to the sector has been driven by the bilateral agreement between the plant quarantine department and the CLOA to control inspection and certification bodies. It has been active since April 2018 until further notice; it is in charge of checking the inspection and certification process and the evaluation of organic export from Egypt, and is intended to establish a reliable database for the organic sector.

STATISTICS — Egypt

Among the SEM countries, Egypt ranks second, after Tunisia, with a total organic agricultural area of 105 908 ha in 2017, showing an increase of more than 10 000 ha compared to the year before. As to the organic share of the total utilised agricultural area (UAA), Egypt was the second among SEM countries in 2017 as well, with 2.4 %. Key data on the organic sector are shown in Table 2.

Organic forest and wild collection area covered 60 000 ha in 2016 and 2017, whereas 20 000 ha were in the conversion period. The total number of organic operators increased slightly for the period 2016 to 2017, with the growth recorded only in the category of organic producers. The number of organic processors remained unchanged, while in 2017 all processors were indicated as organic exporters as well. The organic share in 2017 gave an important impulse to the local market development and was estimated to be 1-2 % of the total market.

Table 2. Key data	2016	2017
Organic agricultural area (ha)	91 731	105 908
Organic share of total agricultural land (%)	2.3	2.4
Organic forest/wild collection (ha)	60 000	60 000
Organic land in conversion (ha)	20 000	20 000
Total No. of organic operators	1 142	1 212
No. producers	900	970
No. processors	242	242
No. retailers	n.a.	10
No. exporters	n.a.	242
No. importers	n.a.	n.a.
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	1-2

*n.a. – not available

Egyptian Organic Product and Organic Inputs Logo

The current status of crop production patterns is reported in Table 3 with the 3 main categories. Depending on the data availability, the main cultivated crops are indicated as single species or crop categories. Data on livestock production were not available, thus indicating the insufficient development of this kind of organic production. Industrial crops are dominating in arable land covering 35 735 ha, of which the highest area is devoted to aromatic plants, medicinal and culinary plants (31 944 ha). Fresh vegetables, melons, strawberries, and cultivated mushrooms are the second with 23 998 ha, followed by cereals cultivated on 8 170 ha. Among permanent crops, the three leading categories are vineyards, citrus fruits, and olives.

Table 3. Main three arable and permanent crops , and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Industrial crops	35 735	38.9
	Fresh vegetables, melons, strawberries, and cultivated mushrooms	23 998	26.2
	Cereals	8 170	8.9
Top 3 key permanent crops	Vineyards	1 970	2.1
	Citrus fruits	1 190	1.3
	Olives	1 008	1.1

The importance of the organic sector is reflected as well in the labour market, with the involvement of 798 600 permanent workers and 2 662 000 seasonal workers in 2017. Depending on the size of organic enterprises, the number of workers employed ranges from 10 to 1 000.

The distribution of organic products covers all marketing channels, except wholesalers (Table 4-a). More than 80 % of organic products are sold in specialized retail shops, including mostly vegetables, fruits, and textiles. A significant proportion of fresh vegetables and fruits is sold directly at the farm gate, while health shops and pharmacies are mostly distributing MAPs. Large retailers account for around 5 % of the market, especially for seasonal vegetables, olive oil, and MAPs. The same goes for online selling, except for MAPs distribution, which is not made via this channel.

Marketplaces for organic products in Egypt are concentrated around the urban areas of Cairo and Alexandria, where consumers include 60-70 % of foreigners. In general, the positive trend is reflected by the presence of organic food sections in many supermarkets.

Table 4. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	TV ads	√
Specialized retail shops	√	Radio	√
Health shops/pharmacies	√	Newspapers	√
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesalers	X	Public transport	√
Online selling	√	Social networks	√
		Fairs	X

The promotion of organic products and sector, in general, is made via a wide range of channels, except the participation in fairs (Table 4 – b), which should be addressed in the future.

IMPORT AND EXPORT — Egypt

Information about the import of organic products into Egypt is not available, due to the lack of a national database or of external sources. In the case of export, information is available only for the main product categories but not for the quantities and values. Thus, key products exported are:

- ⇒ **Herbs** - chamomile, coriander, dill, lemongrass, hibiscus, marjoram, parsley, peppermint, and spearmint.
- ⇒ **Vegetables** - potatoes, onions, garlic, green beans, peppers, and peas.
- ⇒ **Fruits** - citrus, mangoes, grapes, and olives.
- ⇒ **Field crops** - roots and tubers, peanuts and baby corn.
- ⇒ **Cotton** and **textiles**.

Regarding the product destination markets, detailed data are not available, except that the main markets are those of the European Union countries, followed by Japan and USA.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Egypt

Significant research and development projects have been undertaken in the last five years, such as Bio Guard and MARSADEV. Bio Guard project aimed to protect the major crops contributing to the national economy through the application of beneficial microorganisms to bio-control plant and human pathogens in OA. It was implemented by a local company, *Libra Biodynamic Agriculture*, from 2014 to 2016, and it represents a successful example of cooperation between industry and research, with the support of the *International Federation of Organic Agriculture Movements* (IFOAM).

MARSADEV (Matrouh Rural Sustainable Development) project was coordinated by CIHEAM – Bari, in cooperation with the Egyptian Ministry of Agriculture and the *Desert Research Centre* (DRC) of Marsa Matrouh. The project was implemented in the 2014-2017 period and was aimed to enhance local agricultural production by improving processing techniques and encouraging organic production and agricultural associations.

Educational programmes on OA are offered by the Faculties of Agriculture at the three Egyptian Universities: Al Azhar University (Cairo), Ain Shams University (Cairo) and Cairo University. In

addition, CLOA and ARC are actively involved in the dissemination of knowledge on OA through the provision of training for farm managers and engineers on different aspects of OA production systems and the technical application of bio-control agents and bio-fertilisers.

CHALLENGES/PRIORITIES IDENTIFIED	Egypt

The creation of a data collection system and the establishment of a national database are pinpointed as a necessity for the sector's future growth and above all for the improvement of the control system in case of infringements and violation.

The practical application of research findings, as pilot projects, is identified as one of the main challenges, mainly due to the lack of funding sources.

Examples of Egyptian organic products: organic herbal tea and organic table olives

Linkography:

- www.agr-egypt.gov.eg – Ministry of Agriculture and Land Reclamation.
- www.arc.sci.eg/InstsLabs/Default.aspx?OrgID=25 – Central Lab of Organic Agriculture.
- www.arc.sci.eg – Agriculture Research Centre.
- www.egac.gov.eg – Egyptian Accreditation Council.
- www.faoda.org/indexen.html – Fayoum Agro Organic Development Association.
- www.ebdaegypt.com – Egyptian Bio-Dynamic Association.
- www.sekem.com/en/index – "*SEKEM*" – private organic operator.

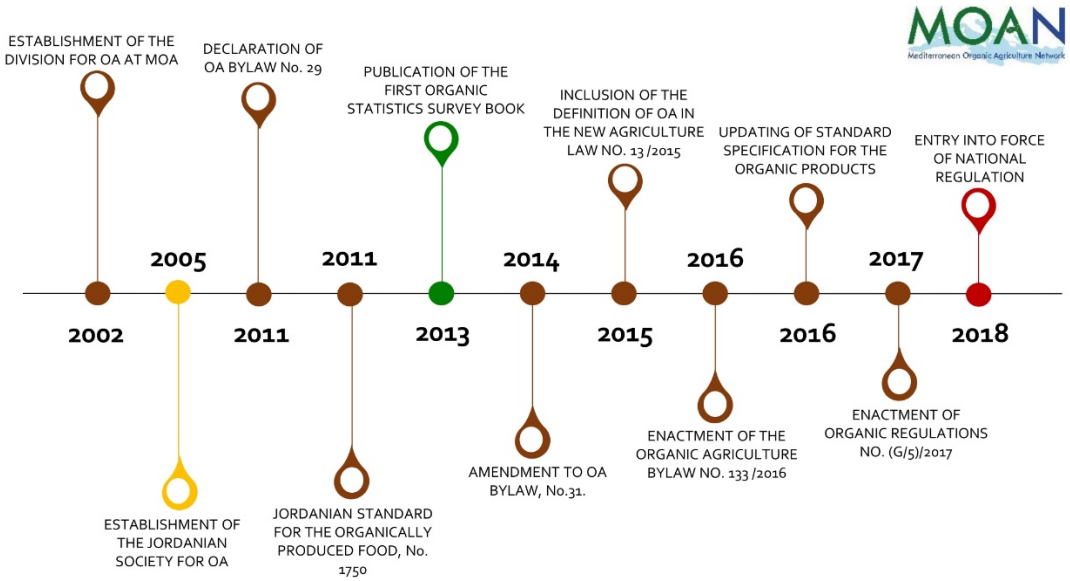
Jordan
Country profile

HISTORICAL DEVELOPMENT

Jordan

Tamam KHAWALDA[1]

In the historical overview of organic agriculture (OA) in Jordan, illustrated in the infographic below, the aspects related to the regulatory framework have been prevalent, indicating efforts done at the country level to boost the sector's development. The division for OA was established at the Ministry of Agriculture in 2002, followed by the formation of the Jordanian society for OA in 2005.



The first bylaw concerning OA was published in 2011, and significant improvements were achieved leading to the entry into force of the national regulation on OA quite recently (2018). Among other actions and events, it is remarkable that since 2013 Jordan has constantly published and updated organic statistic survey books.

2018 was also the first year of implementation of the *National Action Plan for OA*; in the same year the *Division of Organic Farming*, within the *Ministry of Agriculture*, was upgraded to the status of *Organic Agricultural Products Department.*

MAIN SECTOR INSTITUTIONS

Jordan

The competent authority for the organic sector in Jordan is the *Ministry of Agriculture* (MoA). Within MoA, there is the Organic Agricultural Products Department operating under the Plant Production Directorate. Other key institutions are the *Jordan Standards Metrology Organization* (JSMO), the *Jordanian Society for Organic Farming* (JSOF) and the *National Centre for Agriculture Research* (NCAR).

[1] Ministry of Agriculture - Organic Agricultural Products Department. Mediterranean Organic Agriculture Network (MOAN) country representative.

As aforementioned, the national regulation on OA entered into force in 2018 (details are presented in Table 1). At the same time, the certification bodies were informed about the obligation to implement it (namely the organic bylaw No. 133 and the organic regulations No. (G/5)). Also, in the same period the former Division of OA was upgraded to the status of *Organic Agricultural Products Department*.

National regulations cover plant and livestock production rules, processing of food and feed, labelling, control, and import rules, while aquaculture rules are not yet included. Further, regulations also cover beekeeping production rules and registration procedures for the certification bodies and operators at the MoA.

Table 1. National legislation

Year of publication	Bylaw – 2016; Regulation - 2017
Entry into force (year)	2018
Number	Bylaw No. 133; Regulation G/5
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	X
- **Processed Food/Feed**	√
- **Labeling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	EU
Equivalent with EU	No

Plant production rules cover, among others, the following aspects:

⇒ Seeds and plant propagation materials;

⇒ Duration of the conversion period;

⇒ Management of soil fertility;

⇒ Preventive and curative measures for pest and disease control;

⇒ Rules for collection of native wild plants.

The National Organic Action Plan (NOAP), published in 2018, covers the period 2018 to 2022 (Table 2) and is focused on the conversion of conventional farmers to organic farming. This is the second NOAP, which in the first edition covered the period from 2009 to 2014; at that time, it was presented by Her Majesty Queen Rania, as an effort to promote a sustainable approach to OA development across the Kingdom.

Within the new NOAP, MoA is the main funding source and is particularly keen to adopt a clear policy to support the organic sector and overcome barriers faced by farmers, especially during the conversion period.

Alongside with the NOAP, the organic sector is also included in the following documents:

⇒ The National Agricultural strategy 2016-2025.

⇒ The National Action Plan for Mainstreaming the Sustainable Consumption and Production in Agriculture, Food Industry, Transport, and Waste Management Sectors (2015-2025).

Table 2. Details on National Organic Action Plan

English name	The National Action Plan for Organic Agriculture
Full name in national language	الخطة التنفيذية للزراعة العضوية على المستوى الوطني
Running from – to:	2018-2022
Key targets	To convert 150 farms or other operators to organic agriculture.
Financial resources	Ministry of Agriculture

The following actions are prioritized by the NOAP: *i*) follow-up on the implementation of the legal and regulatory framework for OA, taking into consideration the international regulations and

standards and the conditions of Jordan; *ii*) adoption of government policies that encourage OA through providing financial and moral support and help overcome obstacles especially during the conversion period; *iii)* preparation and development of a national programme to increase awareness about OA and its social, economic, environmental, health and other benefits; *iv*) preparation and development of marketing plans and programmes, and opening of new outlets for Jordanian organic products at national and international level; *v*) helping operators to overcome technical obstacles of OA production and *vi*) international and regional cooperation.

The cover page of the Jordanian NOAP in Arabic and English

STATISTICS — Jordan

The total organic agricultural area in Jordan for 2017 was 1 446 ha, with a reduction of 71 ha, as compared to 2016 (Table 3). Data for organic forestry and wild collection, as well as for the land in conversion, were not available.

The total number of organic operators increased for the same period from 23 in 2016 to 28 in 2017. Some of the producers are involved not only in production activities but also in the processing and export of organic products. All processors are olive millers. As to the organic market share and value, data were not available.

Table 3. Key data	2016	2017
Organic agricultural area (ha)	1 517	1 446
Organic share of total agricultural land (%)	0.6	0.5
Organic forest/wild collection (ha)	n.a.	n.a.
Organic land in conversion (ha)	n.a.	n.a.
Total No. of organic operators	23	28
No. producers	19	23
No. processors	4	5
No. retailers	n.a.	n.a.
No. exporters	n.a.	n.a.
No. importers	n.a.	n.a.
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

As reported in the first section of the country profile, since 2013 Jordan has published survey records on OA, based on the following:

⇒ Questionnaires distributed to farmers, processors and at stores (filled on-site);

⇒ Direct communication with control bodies;

⇒ Detailed survey to identify marketing channels and processing units across the whole country.

Arable crops occupy a small area and include only two categories: field crops with 27 ha and vegetables with 16 ha. Among permanent crops, olives are prevailing with 356 ha (accounting for

24.6 % of the total organic agricultural area), followed by date palms (163 ha) and citrus (13 ha). The livestock production was not present in 2017.

Table 4. Main three arable and permanent crops (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Field crops	27	1.9
	Vegetables	16	1.1
	n.a.	n.a.	n.a.
Top 3 key permanent crops	Olives	356	24.6
	Date palms	163	11.3
	Citrus	13	0.9

* n.a. – not available

MARKET AND PROMOTION — Jordan

All marketing channels listed below (Table 5 - a) are present in the country. There are also many local (permanent, seasonal and weekly) markets for fresh and processed organic products, in addition to retail outlets for local and imported organic products.

Table 5. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	**TV ads**	√
		Radio	√
Specialized retail shops	√	**Newspapers**	√
Health shops/pharmacies	√	**Leafleting/newsletter/brochures**	√
Direct on-farm selling	√	**Public transport**	√
Wholesalers	√	**Social networks**	√
On-line selling	√	**Fairs**	√

The same trend was observed for promotion, where all listed channels are used to promote organic products. Informational meetings and workshops are also organised to promote and increase awareness among consumers about OA.

IMPORT AND EXPORT — Jordan

The new regulation covers import rules containing some obligations for the operator who imports organic products, i.e. to notify the MoA about any consignment of organic products and to have a certificate attached to it, issued by the certification body and ensuring that the product is organic.

The data about import and export volumes and product categories are not available.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Jordan

As for the research projects on OA, important is to mention the initiative "*BioJordan*", conducted from 2009 to 2013 under the King Abdullah Development Fund and the Royal Court, to evaluate the development of OA in the country. Further, in 2015 within the project Middle East Regional Agricultural Programme (Danish development cooperation), Jordan was represented by the *National Centre for Agricultural Research and Extension* for the implementation of the component for the inclusion of OA in the regional agricultural programmes. A project on conversion to organic farming is currently under way in cooperation with the Jordanian Association for OA.

A project related to sustainable and organic agriculture in Jerash Governorate is currently being implemented in collaboration with the *Japan International Cooperation Agency* (JICA). It is focused on the production of organic olive oil and the increase in competitiveness of Jordanian olive oil on international markets. It has already had positive impacts on the economic situation of rural farmers.

In the sector of education on OA, starting from 2018 the MoA has developed special programmes for schools. Under the above-mentioned project - Middle East Regional Agricultural Programme, training to farmers was provided on different topics, including the principles of organic farming, organic farm management, the importance and benefits coming from the use of compost, etc.

Moreover, the MOA is working intensively for the development and creation of additional training opportunities for farmers and agronomists and for awareness-raising among consumers. Additionally, since 2018 the MoA has been involved in training and awareness campaigns on the role of women in the rural development sector. All the listed activities are also included in the new NOAP (2018-2022).

CHALLENGES/PRIORITIES IDENTIFIED	Jordan

Despite significant efforts made by the MoA to increase awareness and knowledge about OA among farmers and consumers, this remains a major challenge for the future development of the sector in Jordan. The higher cost of organic inputs and certification costs are identified as barriers for farmers interested in OA; it might be envisaged to work on group certification.

One of the priorities is to increase the number of outlets for organic products, which are currently concentrated in the capital city – Amman. The objective should be to have more open markets and permanent outlets for local organic products, thus increasing the competitiveness of local producers towards imported goods.

Promotion of OA in the Jordanian primary schools

Demonstration field for OA production techniques

Linkography:

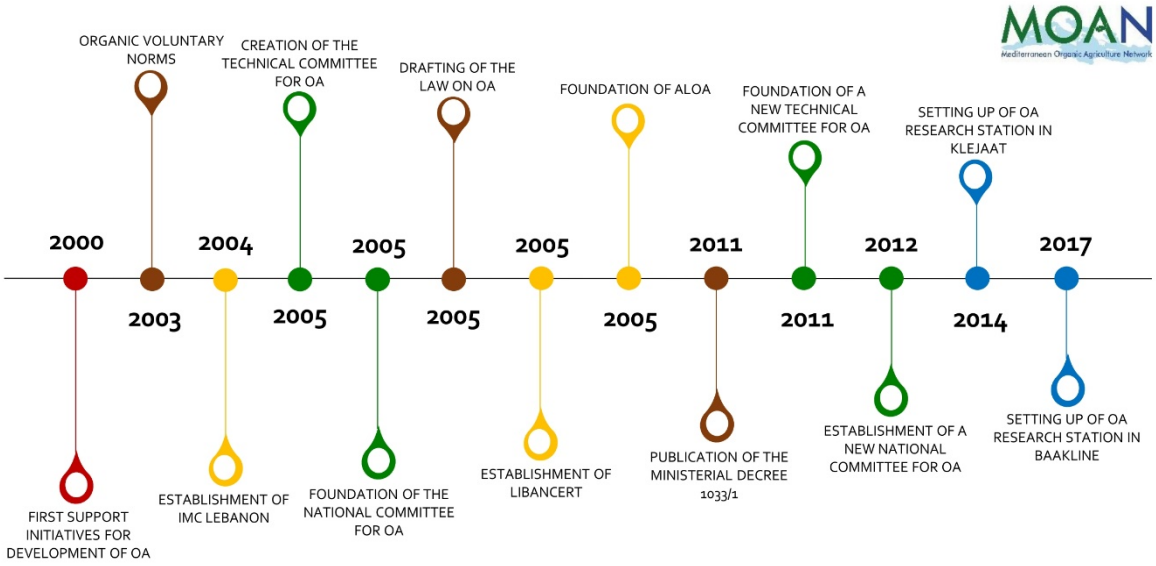
- www.moa.gov.jo/ar-jo/Home.aspx – Ministry of Agriculture.
- www.jsmo.gov.jo/en/ – Jordan Standards and Metrology Organization.
- www.nais-jordan.gov.jo/Pages/index.aspx?lang=EN&DId=10002&I=104159&CId=0&CMSId=8 Jordanian Association for Organic Farming.
- www.ncare.gov.jo – National Center for Agriculture Research.

Lebanon
Country profile

HISTORICAL DEVELOPMENT | Lebanon

Pauline EID[1]

The first initiatives and programmes for the development of organic agriculture (OA) in Lebanon started in the early 1990s, with support from different international organisations. The sector's development dynamics was marked by important actions and events, as shown in the infographic below. It can clearly be seen that milestones are mostly related to the institutional structure, such as the establishment of technical and national committees for OA, which took place twice in case of both. Furthermore, the national committee is currently inactive.



The same as the national committee, the Association for Lebanese Organic Agriculture (ALOA) and the Lebanese certification body – LibanCert are no longer operational. Positive aspects include the setting up of two research stations with a specific focus on OA, one in Kleiaat in 2014 and one in Baakline in 2017.

MAIN SECTOR INSTITUTIONS | Lebanon

The organic agriculture unit within the *Ministry of Agriculture* (MoA) has not yet been established; however, an organic technical committee is operating at the MoA and is in charge of the sector regulation and monitoring. Other key actors include the *Lebanese Standards Institution* (LIBNOR) – under the Ministry of Industry, and the certification body *Istituto Mediterraneo di Certificazione* – IMC Lebanon. IMC Lebanon was established in 2004, and in 2014 it was merged with *Controllo e Certificazione Prodotti Biologici* – CCPB to form CCPB Middle East s.a.r.l., the only certification body currently active in the country.

[1] Ministry of Agriculture - Organic Technical Committee. Mediterranean Organic Agriculture Network (MOAN) country representative.

REGULATORY FRAMEWORK AND SUPPORT POLICIES — Lebanon

In 2005 a draft of the national organic law was submitted to the Parliament but it is still waiting for approval (Table 1).

Table 1. Details on the national regulatory framework

Draft submitted to Parliament	2005 / A national organic law was prepared and submitted to the Parliament and is still waiting for approval.
Decrees	2011 / No. 1033/1 - The delay in approving the law pushed the Ministry of Agriculture to issue a ministerial decree 1033/1 on 21/11/2011 to regulate the organic production and processing. ⇒ The decree is similar in content to the law and it shall function as a surrogate until the law is approved. Also, several other decrees concerning the organic sector were issued.

Support to the sector is not well defined; however, within the MoA Strategy for the period 2014 to 2019, one of the priorities is *"Developing value chains, focusing on better quality, production, marketing and export of agricultural products"*, where the promotion of the organic farming sector is mentioned under the products of plant origin. Furthermore, the strategy aims to promote good agricultural practices through the support to organic farming and quality certification schemes.

STATISTICS — Lebanon

It seems that in recent years the growing demand for organic products on the local market stimulated an increase in the organic agricultural area. Thus, in 2017 the cultivated area was 1 353 ha, as compared to 1 275 ha in 2016 (Table 2). In addition, the total number of organic operators increased from 125 to 138 for the same period. The highest increase was recorded for the number of producers (from 110 to 122) and processors (from 52 to 61). Olive millers and processors of pickled vegetables are the prevailing type of processors.

Table 2. Key data	2016	2017
Organic agricultural area (ha)	1 275	1 353
Organic share of total agricultural land (%)	0.2	0.2
Organic forest/wild collection (ha)	393	209
Organic land in conversion (ha)	n.a.	n.a.
Total No. of organic operators	125	138
No. producers	110	122
No. processors	52	61
No. retailers	7	8
No. exporters	n.a.	n.a.
No. importers	7	5
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

Unlike most other SEM countries, except Tunisia, data were available for other sector operators as well:

⇒ The number of retailers remained almost the same, from 7 in 2016 to 8 in 2017;

⇒ The number of importers decreased from 7 in 2016 to 5 in 2017;

⇒ Data were not available for the value and share of local organic market.

In the cultivated area, a small portion is occupied by arable crops, with the prevalence of cereals (36 ha) and different vegetables (Table 3). Leafy vegetables occupy the same area as cereals (36 ha), followed by root, tuber and bulb vegetables (34 ha).

Organic grape production and harvesting

Drying of organic tomatoes

Grapes for processing cover the highest area, both in absolute terms, and relative to the other permanent crops, with 417 ha in 2017, followed by olives (244 ha), avocado (28 ha), and apple (27 ha). Despite the relatively small area, we must note that OA in Lebanon is very diverse, with cultivation of a very wide range of arable and permanent crops.

Table 3. Main three arable and permanent crops , and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Leafy vegetables	36	2.7
	Cereals	36	2.7
	Root, tuber and bulb vegetables	34	2.5
Top 3 key permanent crops	Grapes for processing	417	30.8
	Olives	244	18.0
	Avocado	28	2.1
	Species	**No. of heads**	**% of the total organic livestock**
Top 3 key livestock categories	Poultry	27 470	96.6
	Goats	730	2.7
	Sheep	230	0.8

Compared to other SEM countries, livestock production is well established, especially in the case of poultry with 27 470 heads (mainly for the production of eggs), followed by goats (730 heads) and sheep (230). Beekeeping is present with a total of 416 beehives in 2017.

MARKET AND PROMOTION — Lebanon

The local market is quite well established in terms of marketing channels (Table 4 - a). In addition to those listed, there are also farmer's markets and box-scheme delivery. When considering the best sold products on the local market, the following five categories are the most common: vegetables and fruits, grains, eggs, dairy products, and baked products.

Promotion is done via radio stations, printed materials (i.e. leaflets, brochures), social networks and participation in fairs (Table 4 - b). In line with MoA efforts to increase awareness about OA, Lebanon hosted the 10th MOAN meeting, held in Beirut from 05th to 9th November, 2018.

Table 4. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	√	TV ads	X
Specialized retail shops	√	Radio	√
Health shops/pharmacies	√	Newspapers	X
Direct on-farm selling	√	Leafleting/newsletter/brochures	√
Wholesalers	√	Public transport	X
On-line selling	√	Social networks	√
		Fairs	√

IMPORT AND EXPORT — Lebanon

Data on the import and export volumes and quantities are not currently available. Only product categories are presented.

⇒ **The main imported products** are poultry meat, rice, peppers, spices, dairy products, beverages, pastas, sugar, sweeteners, spreads, condiments, wine, flour, ice cream, sauces, gravy, yeast, oils, vinegar, jams, honey, syrups, candy, sweets, flakes, cereals, milk, canned vegetables, and salty snacks.

⇒ **The main exported products** are fresh fruits and vegetables, eggs, seedlings of aromatic plants, olive oil, and thyme.

Specific requirements for the import and export of organic products to/from Lebanon are not included in the draft national regulation, thus creating difficulties in terms of traceability. This is especially the case with imported goods, which are usually sold with the organic logo of the country of origin, without entering the national system for organic data collection.

RESEARCH PROJECTS AND EDUCATION — Lebanon

In 2014 the *Lebanese Agriculture Research Institute* opened a new research station in Kleiaat focusing on organic research, and in 2017 it did the same in Baakline. Research activities were focused, among others, on the control of the tomato leaf borer (*Tuta absoluta*) in organic farming. Results of this research were disseminated to organic farmers during a seminar held at the MoA. Details were not available for other research initiatives, except that most of them were focused on economic impact, market assessment and studies on consumers within OA.

CHALLENGES/PRIORITIES IDENTIFIED — Lebanon

Organic producers in Lebanon are not well connected with each other, nor associated. This is the real challenge to overcome in the future by investing in the development of social capital and increasing awareness among organic operators in general about the benefits coming from common actions.

The national regulation and its entry into force remains a priority; moreover, with the publication of the new European Union regulation, it should be reconsidered whether the present draft should be modified and adapted.

Organic strawberries in greenhouse production

Example of processed organic products

Linkography:

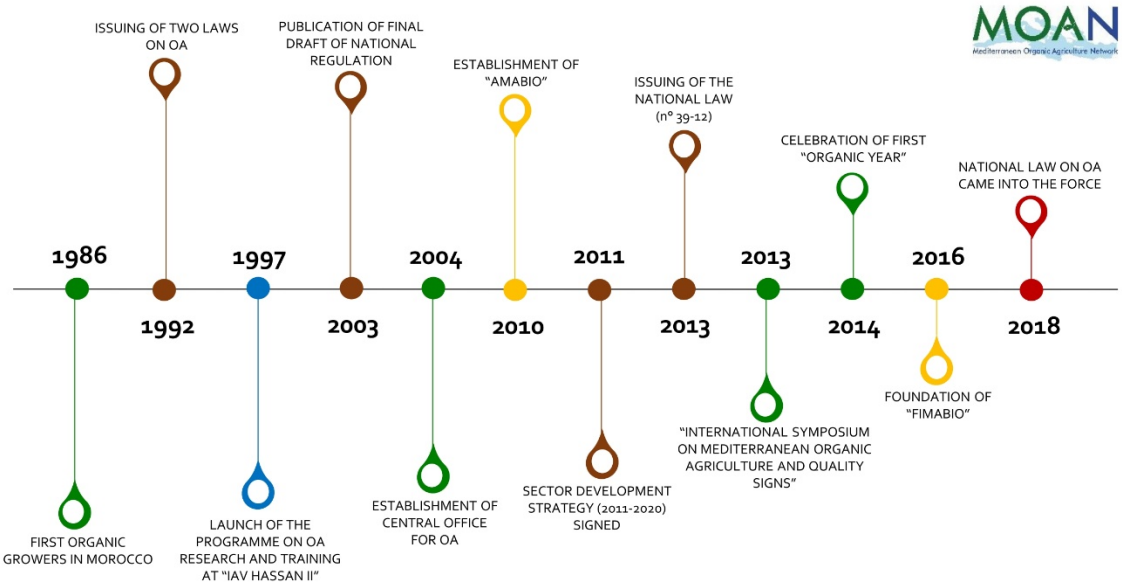
- @ www.agriculture.gov.lb – Ministry of Agriculture.
- @ www.libnor.gov.lb – Lebanese Standards Institution- Ministry of Industry.
- @ www.facebook.com/pg/Imcccpb-Lebanon-1026049594122353/posts/ – IMC-CCPB Lebanon.

Morocco
Country profile

HISTORICAL DEVELOPMENT | Morocco

Nawal FARKACHA[1]

The first organic growers in Morocco were involved in the citrus production and started their activities in 1986. This early initiative was strengthened at regulatory level in 1992 when two laws concerning organic agriculture (OA) were issued (infographic below). One was related to the technical control of organic labeled export-oriented products and the second was a summary of the European legislation on organic farming.



Among other important events, the central office for OA was established in 2004 and the Moroccan Association for Organic Production (AMABIO) in 2010. A national law was issued in 2013 and recently came into the force. As an important event at the Mediterranean level, linking together organic and geographical indication products, an "*International Symposium on Mediterranean Organic Agriculture and Quality Signs related to the Origin*" took place in Agadir, in 2013, with the support of CIHEAM Bari.

MAIN SECTOR INSTITUTIONS | Morocco

As umbrella institution, the *Ministry of Agriculture, Fisheries, Rural Development and Forests* (MAPMDREF) is responsible for organic sector management and development. Associations are well established and important sector pillars are present with the *Moroccan Movement for Organic Farming* (FIMABIO), *National Association of Producers of Organic Farming* (A.NA.PRO.BIO), *National Association for the Promotion of Organic Products* (VAL.BIO.MAROC) and *National Association of Distributors and Exporters of Organic Products* (ANADEX.BIO).

[1] Ministry of Agriculture, Fisheries, Rural Development and Forests. Mediterranean Organic Agriculture Network (MOAN) country representative.

As previously reported, the national law on OA entered into the force in September 2018. It covers plant and livestock production rules, processing, labelling, control, import rules and aquaculture production rules (details in Table 1). The law also covers the marketing of organic products and the use of plant propagating material and seeds.

The national logo was published in 2015, while conditions for equivalence with third countries regulations in 2017.

Table 1. National legislation	
Date of publication	February, 2013
Entry into force (year)	2018
Number	National regulation (Law No 39-12)
Key contents:	
- **Plant production rules**	√
- **Livestock production rules**	√
- **Aquaculture prod. rules**	√
- **Processed Food/Feed**	√
- **Labelling**	√
- **Controls**	√
- **Import rules**	√
Harmonized with:	X
Equivalent with EU	No

⇒ Implementing texts for national legislation are detailed in 2 decrees and 8 Ministerial orders (Arrêtés).

Among decrees concerning OA, the focus is on:

⇒ Decree No. 2-13-358 of 10 March 2014. Composition and mode of operation of the National Commission of organic production.

⇒ Decree No. 2-13-359 of 10 March 2014. Implementation of Law No 39-12.

In 2011, the *Sector Development Strategy* for the period 2011-2020 was signed. It has a focus on three types of activities: research and training, technical assistance and commercialization of OA (Table 2). Financial resources for the strategy implementation amount to a total of EUR 100 million (25% from the state budget and 75% from sector professionals).

Some of the objectives indicated in the strategy are listed below:

⇒ To increase cultivated organic area (up to 40 000 ha).

⇒ To increase total organic production (up to 400 000 t, from which 60 000 t for export)

⇒ To create 35 000 permanent jobs and boost the total sector turnover up to EUR 72 million.

Table 2. Details on National Strategy and Organic Action Plan	
English name	Organic Value Chain Development Strategy in Morocco
Full name in the national language	*Contrat-programme pour le développement de la filière biologique au Maroc*
Running from – to:	2011-2020
3 **key targets:**	- Research and Training - Technical assistance - Commercialization
Financial resources	State budget and private initiatives (FIMABIO)

Organic forestry and wild collection are dominating the sector. In this segment, Morocco ranks first among SEM countries, with 197 896 ha in 2017 (Table 3). Despite the sector constant development, cultivated organic area still occupies a significantly smaller proportion of the total

organic area, being 9 854 ha in 2017. A total number of organic operators recorded growth from 227 to 230 operators, from 2016 to 2017.

The data collection system is characterized by shortcomings, thus details on the type of operators are not available. The structure of the operators (i.e. producers, processors, retailers, exporters etc.) could provide additional insights about the sector and it would be valuable to obtain data in this respect. Also, data on local organic market share and value were not available.

Table 3. Key data	2016	2017
Organic agricultural area (ha)	8 566	9 854
Organic share of total agricultural land (%)	0.03	0.03
Organic forest/wild collection (ha)	180 390	197 896
Organic land in conversion (ha)	737	1 050
Total No. of organic operators	227	230
No. producers	n.a.	n.a.
No. processors	n.a.	n.a.
No. retailers	n.a.	n.a.
No. exporters	n.a.	n.a.
No. importers	n.a.	n.a.
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

Moroccan Organic Agriculture Logo

The structure of the cultivated crops is presented in Table 4, with the three leading ones for each segment. Among the arable crops, production of cereals, legumes, and forage ranks first with 1 094 ha, followed by vegetable crops (737 ha), spices and MAPs (478 ha). A peculiarity for Morocco is the production of saffron on 35 ha in 2017.

In the category of permanent crops, olives are first with 3 100 ha, followed by figs (2 100 ha) and citrus fruits (1 281 ha). In the same category, it is interesting to mention the production of organic avocado, which occupies an area of 351 ha - with a yearly production of 10 tons per ha. Organic livestock production is present in Morocco, but additional details and statistics are not available.

Table 4. Main two arable and permanent crops cultivated (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Cereals, legumes, and forage	1 094	11.1
	Vegetable crops	737	7.5
	Spices and MAPs	478	4.9
Top 3 key permanent crops	Olives	3 100	31.4
	Figs	2 100	21.3
	Citrus fruits	1 281	13.0

Development of the local market is part of the national strategy, where one of the objectives is to increase domestic consumption of organic products. Currently, present marketing channels include around 20 specialized retail shops, health shops and pharmacies (mostly for organic cosmetics), on-farm selling via box scheme distribution and online selling in the capital city of Rabat (Table 5 – a).

There is an evident lack of promotion for organic products (Table 5 – b), with TV and radio as main channels, coupled with participation in fairs (e.g. BIOFACH in Germany and SIAM in Morocco). To improve this aspect, an extensive promotional programme will be undertaken during the period 2018 -2022 as part of the project with the World Bank. Indeed, a promotional campaign on national TV and radios was launched in November 2018.

Table 5. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail stores (Hypermarkets, Supermarkets)	X	TV ads	√
Specialized retail shops	√	Radio	√
Health shops/pharmacies	√	Newspapers	X
Direct on-farm selling	√	Leafleting/newsletter/brochures	X
Wholesaler	X	Public transport	X
On-line selling	√	Social networks	X
		Fairs	√

IMPORT AND EXPORT — Morocco

Data on import were not available, while for the export, the main product categories are identified as follows:

- ⇒ **Early fruits and vegetables** - zucchini, cucumber, pepper, tomato, melon, and strawberries.
- ⇒ **Citrus fruits** - oranges and small citrus fruits.
- ⇒ **Processed plant products** - argan oil, deep-frozen orange juice, preserved olives, frozen strawberries, capers, and canned green beans.
- ⇒ **Spices and herbs** - thyme, rosemary, and verbena.

With respect to the export quantities, data, partially available for 2017, were as follows: vegetables – 3 932 tons, citrus fruits – 3 383 tons and processed organic products – 8 984 tons. Markets of the European Union (i.e. France, Germany, and Switzerland) are the main destination for Moroccan organic goods, followed by Turkey and USA.

COOPERATION/RESEARCH PROJECTS AND EDUCATION — Morocco

The leading institutions in the sector of research and education are "*Institut Agronomique et Vétérinaire Hassan II*" (IAV Hassan II), "*École Nationale d'agriculture de Meknès*" (ENA) and "*Institut National de Recherche Agronomique*" (INRA). Under the responsibility of the above institutions, several research activities concerning OA have been carried out in the framework of the National Strategy for the development of organic value chains.

IAV Hassan II was a pioneer in the sector of education and in 1997, it launched the program on OA research and training.

CHALLENGES/PRIORITIES IDENTIFIED — Morocco

Even though training, research, and technical assistance are the pillars of a national strategy on OA, improvement of these segments is still of great importance for the sector development.

Furthermore, the development of marketing strategy for a higher presence of organic products in the local market was highlighted as a challenge, indicating the need to become one of the targets of future projects.

Linkography:

- @ www.agriculture.gov.ma/en – Ministry of Agriculture, Fisheries Rural Development and Forests.
- @ www.fimabio.org – Moroccan Movement for Organic Farming.
- @ www.iav.ac.ma – Institut Agronomique et Vétérinaire Hassan II.
- @ www.inra.org.ma – Institut National de Recherche Agronomique.

Palestine
Country profile

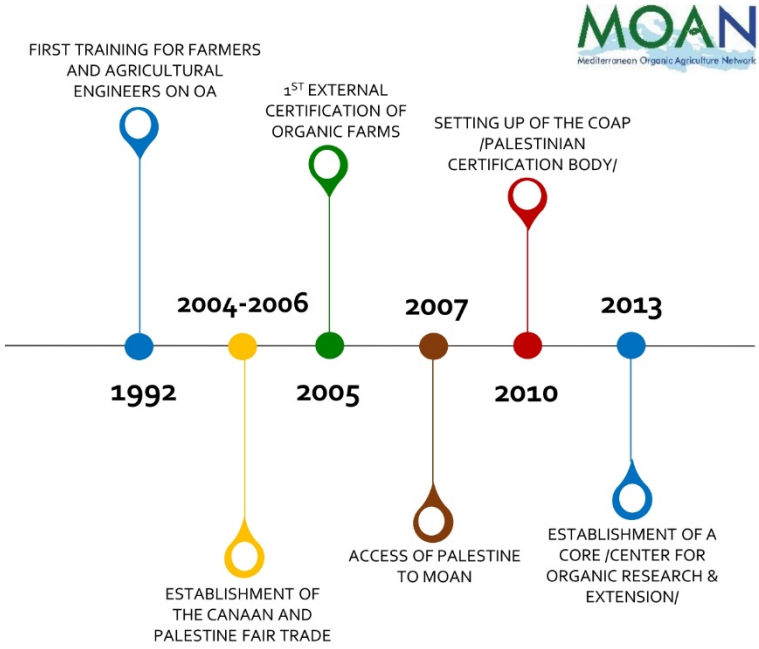
HISTORICAL DEVELOPMENT

Palestine National Authority

Ibrahim Hamdan ABDALHAMID[1]

Organic agriculture (OA) in Palestine can be considered young, although the earliest experiences in this sector can be traced back to 1992. However, slow but continued progress has been recorded until now.

The development of OA started with NGO activities, through different projects supported by external funds. At the institutional level, in 1992 *The Palestinian Agricultural Relief Committee* (PARC) took the first step towards OA by organizing a training programme for farmers and agriculture engineers on OA principles and production techniques. This activity lasted until 2004 and it was carried out in collaboration with *The Egyptian Centre for Organic Farming* (ECOA), where farmers and agronomists attended a targeted training programme (infographic below).



During the period 2004-2006, two fair trade organizations were established (the *Canaan Fair Trade Company* - CANAAN and the *Palestine Fair Trade Association* – PFTA). In 2005, the first organic farmers were certified by an external control body, while in 2010 the Palestinian control body was established (*Company of Organic Agriculture in Palestine* – COAP). One of the milestone in Palestine's OA historical development is its access to the *Mediterranean Organic Agriculture Network* (MOAN) in 2007. Further advances have been made to unlock the local potential for OA development in 2013 by setting up the *Centre for Organic Research and Extension* (CORE).

[1] Ministry of Agriculture - Pest Risk Analysis Department. Mediterranean Organic Agriculture Network (MOAN) country representative.

MAIN SECTOR INSTITUTIONS	Palestine National Authority

The Ministry of Agriculture (MoA), which is in charge of the agriculture sector, is the competent authority for organic production. However, an OA unit has not been set up yet. Recently, within the MoA, a committee has been appointed, composed of the personnel from different departments, and entrusted with the management of OA issues.

In addition to the MoA, the following sector key players should be mentioned:

⇒ *Palestine Agriculture Relief Committee* (PARC)

⇒ *Canaan Centre for Organic Research and Extension* (CORE)

⇒ *Company of Organic Agriculture in Palestine* (COAP)

⇒ *Canaan Fair Trade Company* (CANAAN)

⇒ *Palestine Fair Trade Association* (PFTA)

REGULATORY FRAMEWORK AND SUPPORT POLICIES	Palestine National Authority

So far, OA has been practised without involving directly the MoA and without the support of a national regulation or of specific standards. The only initiative concerning a regulatory framework can be traced back to 2010, when some volunteers from the MoA and the COAP, as part of the PARC, committed themselves to the drafting of a national regulation. However, information about the output of this attempt are not available.

At present, there is no national control system in force, and producers rely on certification bodies accredited by international organizations. Two certification bodies are operating in the country: *i)* the aforementioned COAP – a local certification body, performing single farm and group certification, and *ii)* the *Institute for Marketecology* (IMO) (member of the *ECOCERT group*, an international certification body, without an *in loco* office), which has a contract with CANAAN to perform group certification, including internal audit. The IMO inspects farmers and their cooperatives on an annual basis for control and certificate issuance.

Different types of organic aromatic olive oil produced in Palestine

Direct support is not provided to the OA sector; nevertheless, through the agricultural strategy (*Agriculture Strategy 2017-2020*) and/or other sector strategies (*Food safety policy*, *Environment*

Protection Policy, etc.), the MoA is engaged in support of moving toward ecological farming, recycling, sustainable use of resources, reduced use of chemicals, market development, food safety, and gender equality.

STATISTICS	Palestine National Authority

In 2017, the organic agricultural area totalled 5 297 ha, but it was lower compared to the previous year (for 696 ha). A similar trend was observed for the area under conversion, which declined from 943 ha in 2016 to 678 ha in 2017. Even if we consider that this area has partially completed the conversion period and has been certified, the figures for 2017 indicate that there is little interest among other agricultural producers in moving to OA and in starting conversion (Table 1).

Along with the decrease in the area under organic, the total number of organic operators declined (from 1 553 to 1 499 in the same period; mostly in the category of producers), while the number of processors has remained almost the same (from 46 in 2016 to 45 in 2017, of which 42 are olive oil millers). Except for the number of exporters (equal to 5 in both years), there was no data available for other operators, and the share and value of the local organic market.

Overall, the operators' withdrawal and the shrinkage of the certified organic area were recorded over the last couple of years, due to the lack of direct support policies and of funded projects focused on the OA sector. It is worth mentioning, by way of example, that some cooperatives started to practice OA, in the past, within a number of projects that covered the certification costs. However, after the project end, the farmers could not pay for certification themselves, especially when their produce was not sold on external markets (on the local market organic products are sold at the same price as conventional products).

Table 1. Key data	2016	2017
Organic agricultural area (ha)	5 993	5 297
Organic share of total agricultural land (%)	0.04	0.04
Organic forest/wild collection (ha)	4	4
Organic land in conversion (ha)	943	678
Total No. of organic operators	1 553	1 499
No. producers	1 553	1 449
No. processors	46	45
No. retailers	n.a.	n.a.
No. exporters	5	5
No. importers	n.a.	n.a.
Organic market (€)	n.a.	n.a.
Share of total market (%)	n.a.	n.a.

*n.a. – not available

⇒ Organic wild collection covers an area of 4 ha, all intended for collection of capers.

⇒ One of the main characteristics of the Palestinian OA is intercropping, and this creates some difficulties in data elaboration when considering area per single crop.

⇒ Where intercropping is applied (next to olive trees), the species grown are the following:

- Carob
- Jojoba
- Thyme

When considering the crop categories (Table 2), only wheat is reported among arable crops, with a total of 80 ha, while in the group of permanent crops, olives cover the largest area with 5 016 ha, followed by almonds (195 ha) and lemon (1.3 ha).

Table 2. Main three arable and permanent crops cultivated, and livestock categories (2017)

	Crop	Area (ha)	% of the total organic area
Top 3 key arable crops	Wheat	80	1.5
	n.a.	n.a.	n.a.
	n.a.	n.a.	n.a.
Top 3 key permanent crops	Olives	5 016	94.7
	Almond	195	3.7
	Lemon	1.3	0.02

* n.a. – not available

Interestingly, also organic garlic (0.2 ha) and date palms are grown over an area of 1.4 ha. Nowadays, there is neither organic livestock nor beekeeping production in Palestine.

MARKET AND PROMOTION — Palestine National Authority

The only marketing channel for organic products in Palestine today is represented by the wholesalers (Table 3-a), mostly engaged in exports. As regards the promotion channels (Table 3-b), leafleting, social networks and fairs are the main channels for OA.

Table 3. Marketing and Promotion channels

a) Marketing channels		b) Promotion channels	
Large Retail (Hypermarket, Supermarket)	X	**TV spots**	X
Specialized retail shop	X	**Radio**	X
Health shops/pharmacies	X	**Newspapers**	X
Direct on-farm selling	X	**Leafleting/newsletter/brochures**	√
Wholesaler	√	**Public transport**	X
On-line selling	X	**Social networks**	√
		Fairs	√

IMPORT AND EXPORT — Palestine National Authority

There are no information and data available on import of organic products. Therefore, it would be interesting to explore the import activities under way for organic inputs, since they are very much needed given the current production scale.

As Palestinian OA is export-oriented, most of the crops grown and of the products are intended for external markets. The range of export destinations is quite broad; it includes the USA, the EU markets, Canada, South Korea, Japan, Australia, Hong Kong, India, Kuwait, the UAE, Malaysia, Taiwan, and Switzerland, and indicates a huge potential for the future sector growth.

Among the exported products, the most important is olive oil, followed by almonds, capers, thyme, basil, lemon, and garlic. Freekeh and cuscus are exported as well.

Concerning the domestic market, organic olive oil is the only product whose presence has been reported, but no information is available about the sales amount and value. Organic olives and olive oil are partially consumed by the producer or marketed locally, and there is no clear price difference compared to conventional products.

COOPERATION/RESEARCH PROJECTS AND EDUCATION	Palestine National Authority

Some research trials have been done, with the involvement of the CORE and the PFTA, on intercropping, cover crops, composting and olive and almond key pests. No other detail is known concerning research or cooperation projects.

A similar situation is observed in the sector of education, where there are neither sepcific programmes nor courses with a focus on OA. However, the CORE and the PARC are cooperating with CIHEAM Bari and Al-Najah National University to provide capacity building and training assistance. Also, the MoA and CIHEAM Bari signed an agreement for the participation of Palestinian students in the Mediterranean Organic Agriculture Master of Science programme delivered by CIHEAM Bari.

CHALLENGES/PRIORITIES IDENTIFIED	Palestine National Authority

One of the critical issues for small organic producers in Palestine is the limited availability of organic inputs which increases production costs, thus affecting the product price and the product access to the local market. Moreover, certification costs and the lack of consumer awareness are an additional obstacle to the domestic market development. These problems are a priority for the future of OA in Palestine, and targeted and timely solutions might contribute to unlock the country's potential for increase of the organic area.

At the technical level, pest control in OA is an important challenge for Palestinian organic producers and it should be addressed by knowledge sharing and capacity building. One more criticality is the current lack of cooperation and research projects that should be faced to possibly create a bridge for knowledge and skill transfer.

Different generations of organic farmers in Palestine

Linkography:

- www.moa.pna.ps – Ministry of Agriculture.
- www.palestine-core.org – Canaan Centre for Organic Research and Extension.
- www.coap.org.ps – Company of Organic Agriculture in Palestine.
- www.pal-arc.org – Palestine Agriculture Relief Committee.
- www.canaanpalestine.com – Canaan Fair Trade Company.
- www.palestinefairtrade.org – Palestine Fair Trade Association.

MOAN

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