Research on Organic Action Plans & current experience in Scotland

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Assessing Organic Action Plans as policy tools for growth of the organic sector in the UK and Europe

Organic Farming MSc thesis
SRUC/Glasgow Uni - 2023

Context

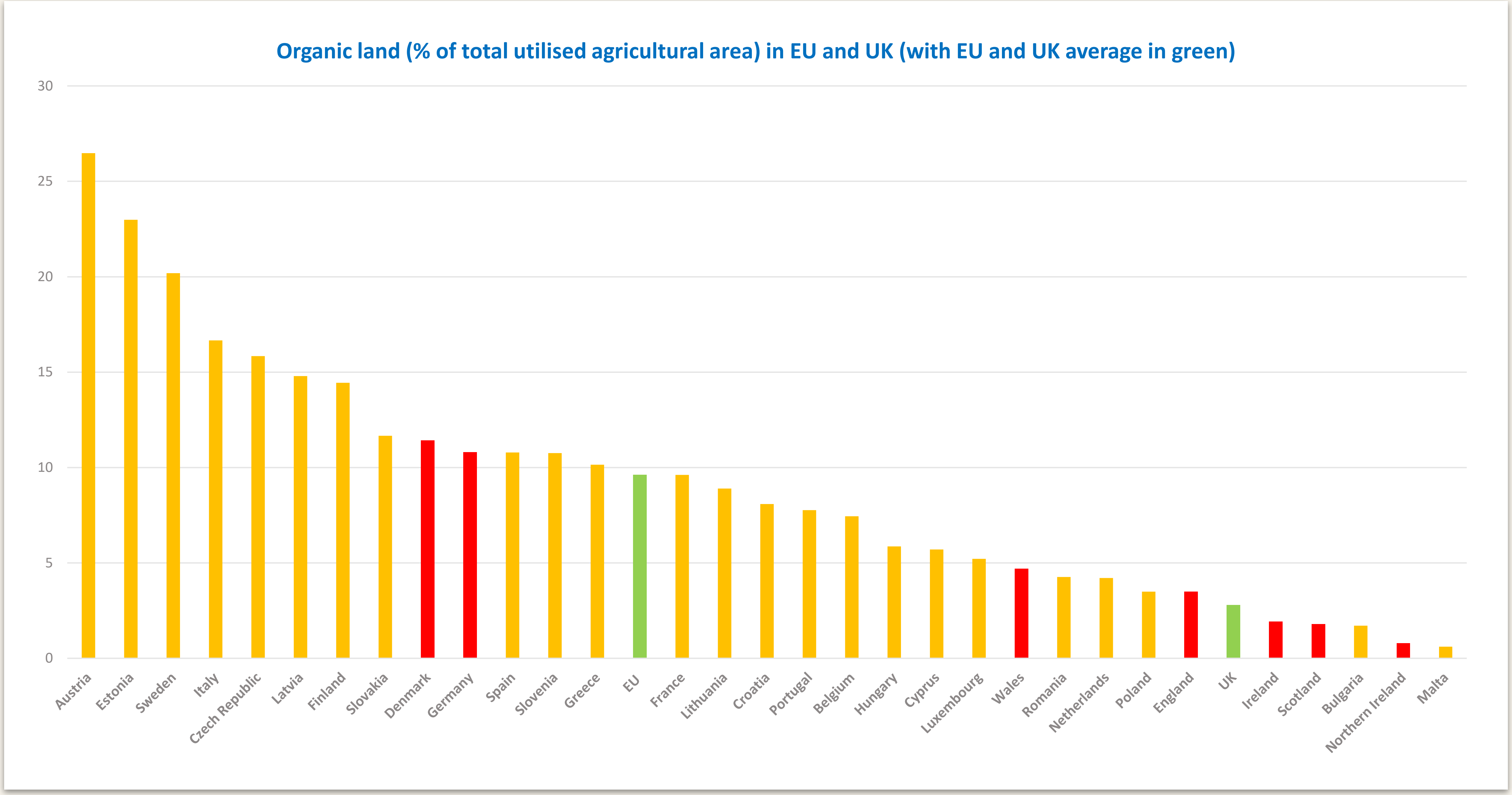
- Public policy support has been provided by the EU and UK since 1990s recognising the environmental, market and social benefits delivered by organic

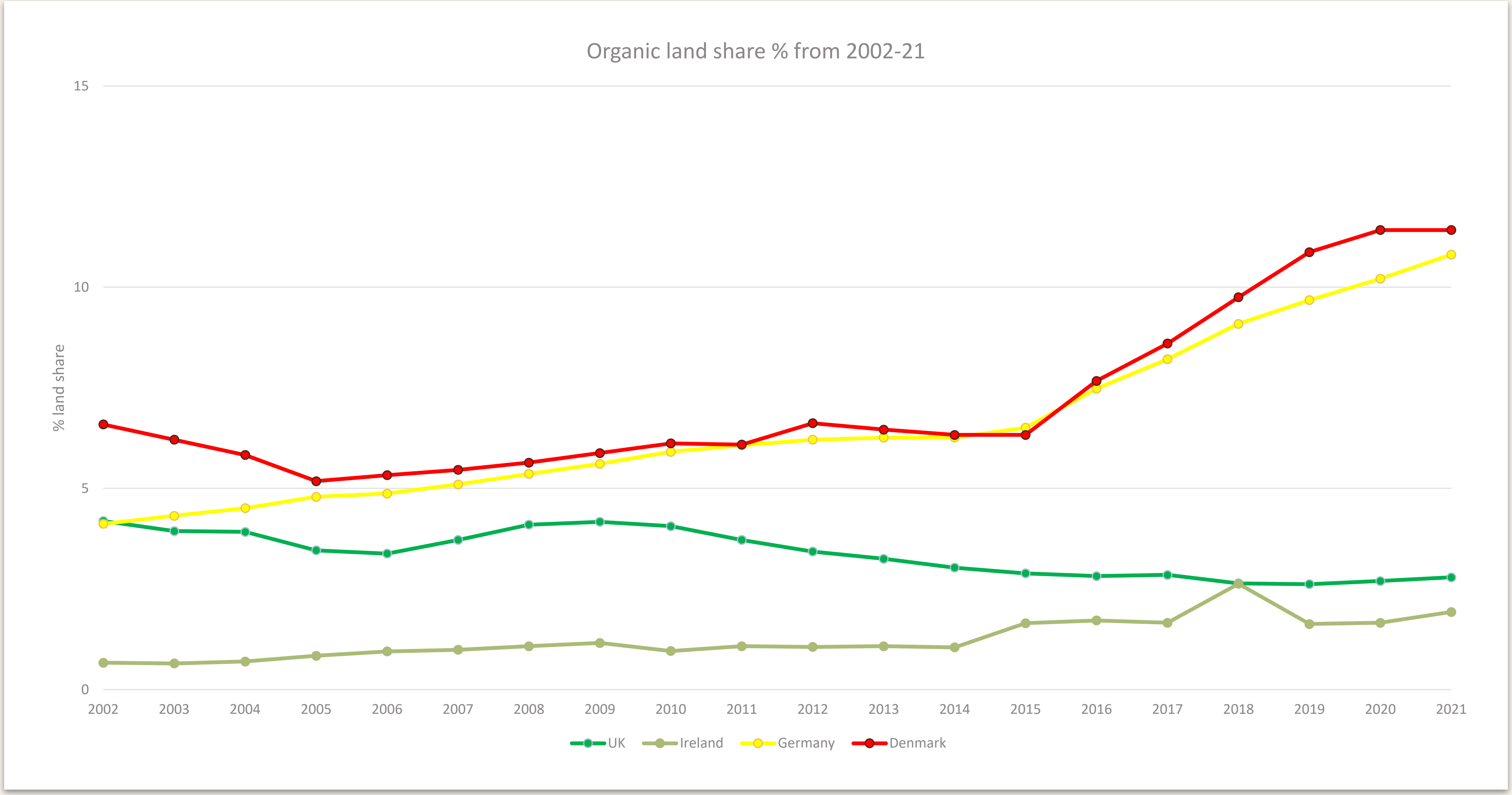
- Organic Action Plans can integrate a range of policy measures on production and consumption of organic food – and help develop the market for organic produce

- In Scotland, there have been three plans, in 2003, 2011 and 2016. Work has just started on a fourth (2024).

Methodology

- Organic action plans from last 20 years from four UK nations and three EU MS comparators (Ireland, Germany and Denmark)
- Objectives of plans assessed against data on organic land share, market share, retail sales and the number of producers and processors.
- Interviews with key stakeholders – from government, non-government organisations and organic sector representative bodies – all of whom were involved in the development process of plans in the selected countries.


Organic land (% of total utilised agricultural area) in EU and UK (with EU and UK average in green)
30
25
20
15
10
5
0
Austria
Estonia
Sweden
Italy
Czech Republic
Latvia
Finland
Slovakia
Denmark
Germany
Spain
Slovenia
Greece
EU
France
Lithuania
Croatia
Portugal
Belgium
Hungary
Cyprus
Luxembourg
Wales
Romania
Netherlands
Poland
England
UK
Ireland
Scotland
Bulgaria
Northern Ireland
Malta



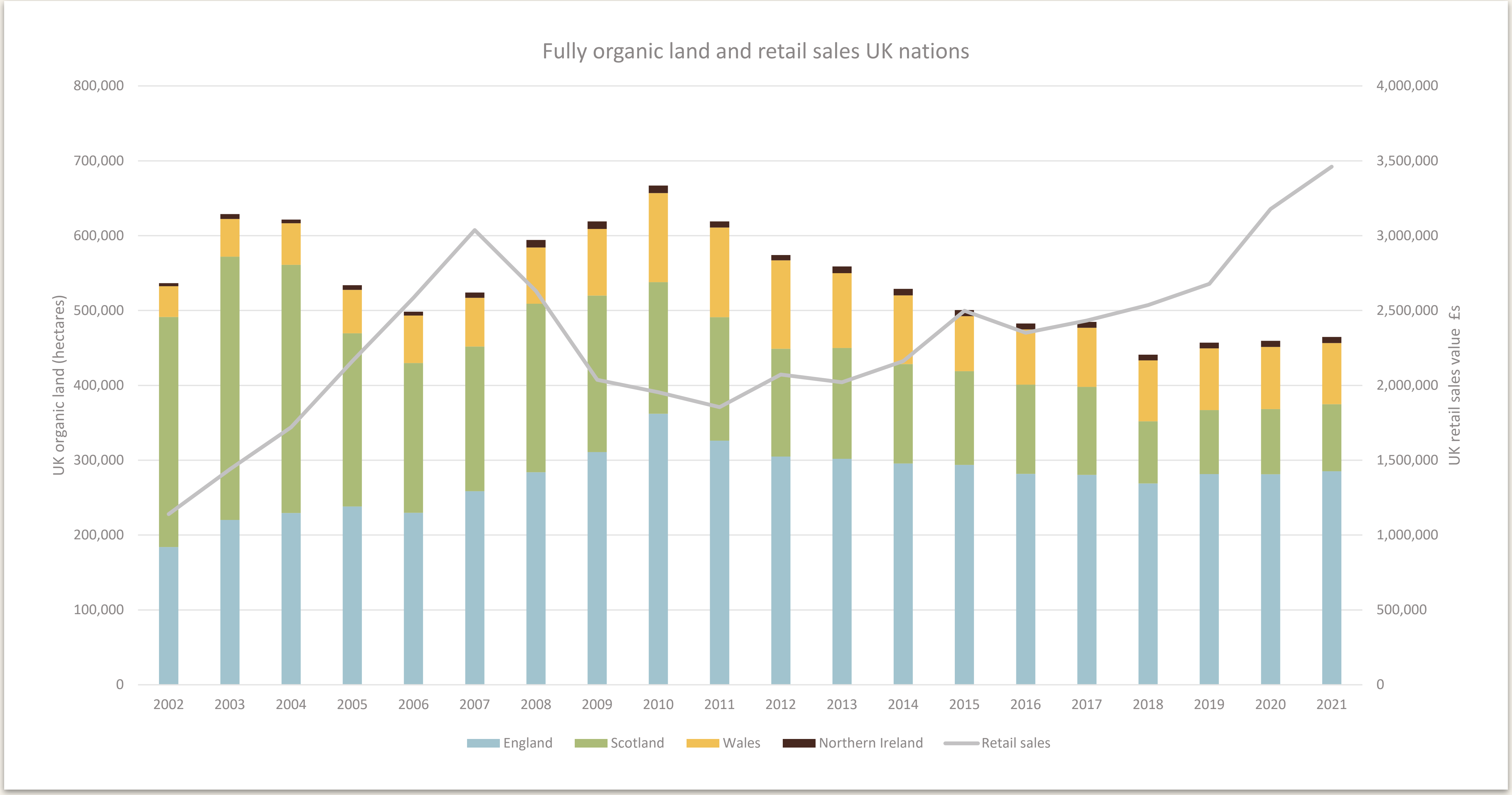
Organic land share % from 2002-21
% land share
15
10
5
0
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
UK
Ireland
Germany
Denmark

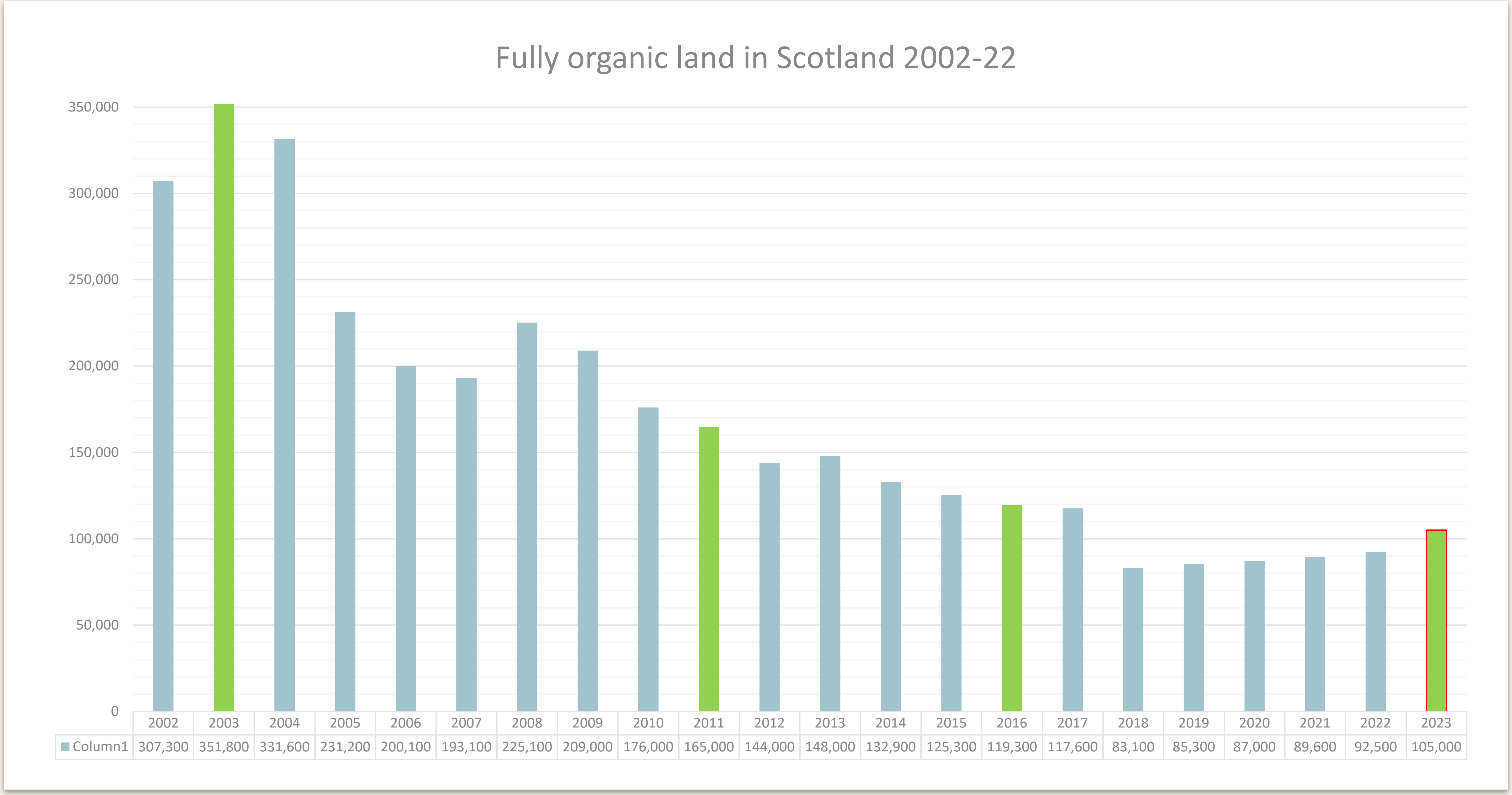
Mapping of key action points within selected Organic Action Plans

	ENG	SCO	WAL	NI	GER	DK	IRE
Land target							
Increasing market share							
Public procurement							
Conversion support							
Better integration with AES							
Supply chain support							
Market development							
Consumer-facing promotion							
Export focus							
Availability / supply of seed							
Benchmarking / efficiency							
Research / Innovation							
Education / training							
Data / information							
Regulation / Governance							
Public funding committed							
Monitoring / Evaluation							

Targets within Organic Action Plans studied

	England	Scotland	Wales	NI	Denmark	Ireland	Germany
Land target			Increase land to 10-15% share by 2010		To double production area by 2020		20% target for organic land share
Production target						Increase organic milk production by 10% annually; double cattle production from 0.8-1.6%	
Market share target	To increase to 70% from a 30% base						
Sectoral targets						Production targets for cereals (2,426ha to 5,000ha); Horticulture (524-750ha); Farmed salmon (20k-26k tonnes	
Procurement target							At least 20% organic food in public kitchens, aiming for 30%


Fully organic land and retail sales UK nations
UK organic land (hectares)
800,000
700,000
600,000
500,000
400,000
300,000
200,000
100,000
0
UK retail sales value £s
4,000,000
3,500,000
3,000,000
2,500,000
2,000,000
1,500,000
1,000,000
500,000
0
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
England
Scotland
Wales
Northern Ireland
Retail sales


Fully organic land in Scotland 2002-22
350,000
300,000
250,000
200,000
150,000
100,000
50,000
0
2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023
Column1 307,300 351,800 331,600 231,200 200,100 193,100 225,100 209,000 176,000 165,000 144,000 148,000 132,900 125,300 119,300 117,600 83,100 85,300 87,000 89,600 92,500 105,000

Comparing desk-based analysis with interview analysis

Indicators from action plan analysis	Themes from interview analysis
Public funding committed	Financing
Area supported under organic management	Political support
Market share for organics	Partnerships/collaboration
Increasing consumption	Market development
Monitoring/evaluation	Evaluation
Communication	Clear messaging
Area under organic management	Setting targets (land, producers, market share, procurement etc)
Policy coherence	Policy integration
Procurement of organic food	Public procurement of organic food
Education and training	Environmental benefit
Data collection	Data/information
Research investment	External factors
Benchmarking/business improvement	
Exports of organic food	

Headline findings from research

- Organic Action Plans, in certain circumstances, can be effective mechanisms for delivering on multiple public policy objectives.
- While each individual plan must be tailored to specific local needs, common elements of successful plans can be identified.
- Under the right circumstances, these examples of best practice can be successfully replicated in different countries.
- Key themes include financing, target setting, capacity building in organic NGOs, accountability for delivery of actions, the use of public-private partnerships and the role of public procurement.
- Monitoring and evaluation frameworks are crucial to measuring progress towards stated objectives and should be integrated during the development stage of the plan.

Additional points for Scotland

- Balance supply ‘push’ and demand ‘pull’ measures – focus on environmental benefits but also market development to avoid over or under supply of produce – this was not achieved with previous plans

- Monitoring and evaluation frameworks must be integrated during the development stage and used to measure progress towards objectives – these were absent from plans.

Support for organic in Scotland

- In the Bute House Agreement, the Scottish Government committed to 'at least' doubling the amount of organic land in Scotland by 2026, and to producing an Organic Action Plan.

- The Scottish Organic Stakeholders Group (SOSG) is working with government to develop the Action Plan to help deliver sustainable growth of the sector.

- Industry body Scotland Food and Drink now has an Organic Development Manager post, focusing on market opportunities for organics in Scotland.

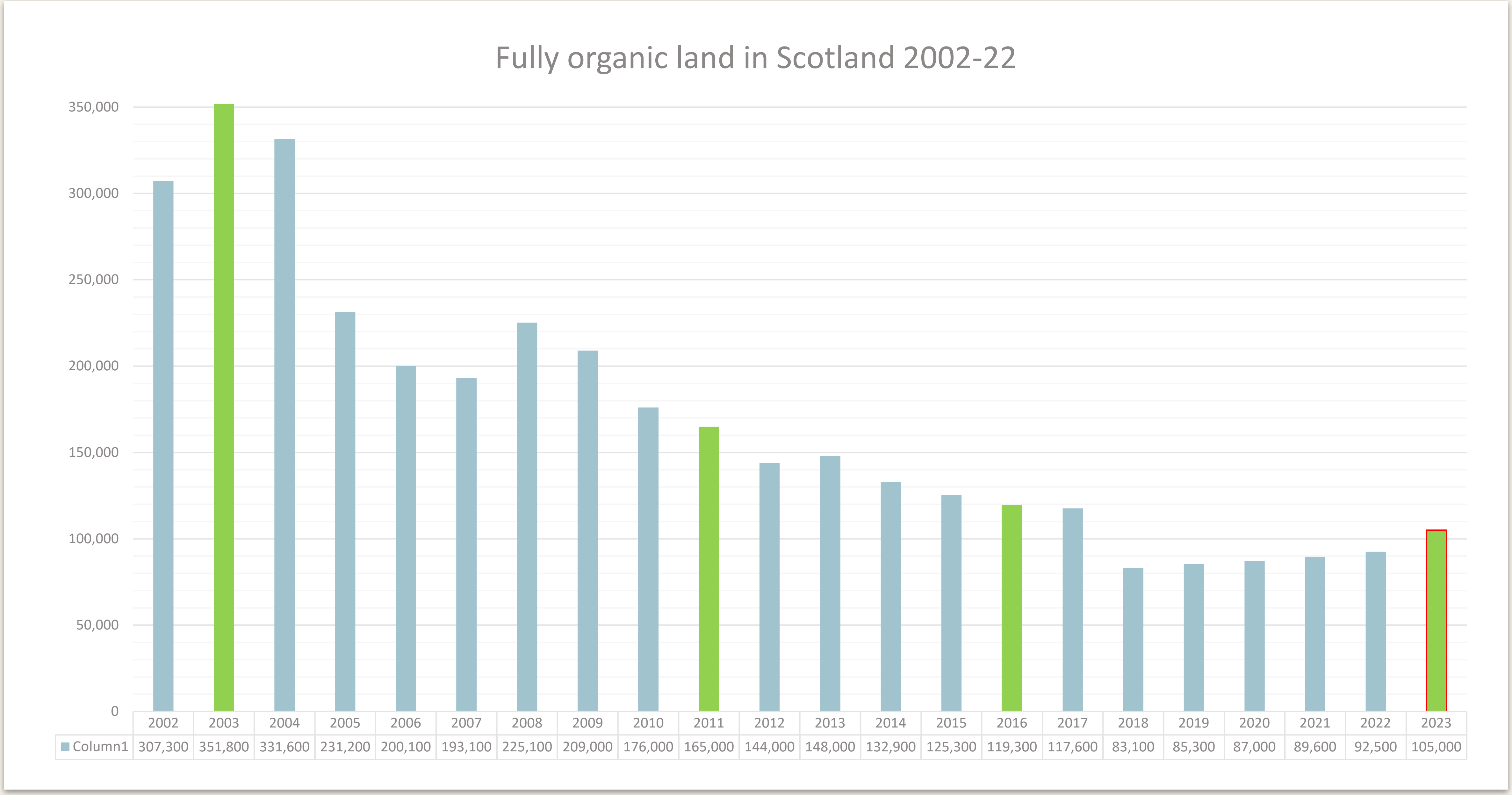
Recent changes to AECS

Organic Conversion/Maintenance

- Area caps removed in 2023 (and remain suspended for 2024 round). While there is no upper limit for land in organic conversion or maintenance you must be able to demonstrate that the land is used for agricultural purposes.

- Small-scale organic producers (under 3ha threshold for BPS) can access £500 minimum payment provided they are utilising at least 0.01ha of their land for growing

- Policy development work ongoing within Scot Govt on post-CAP support framework (from 2026) and what provisions there will be for organic farming within that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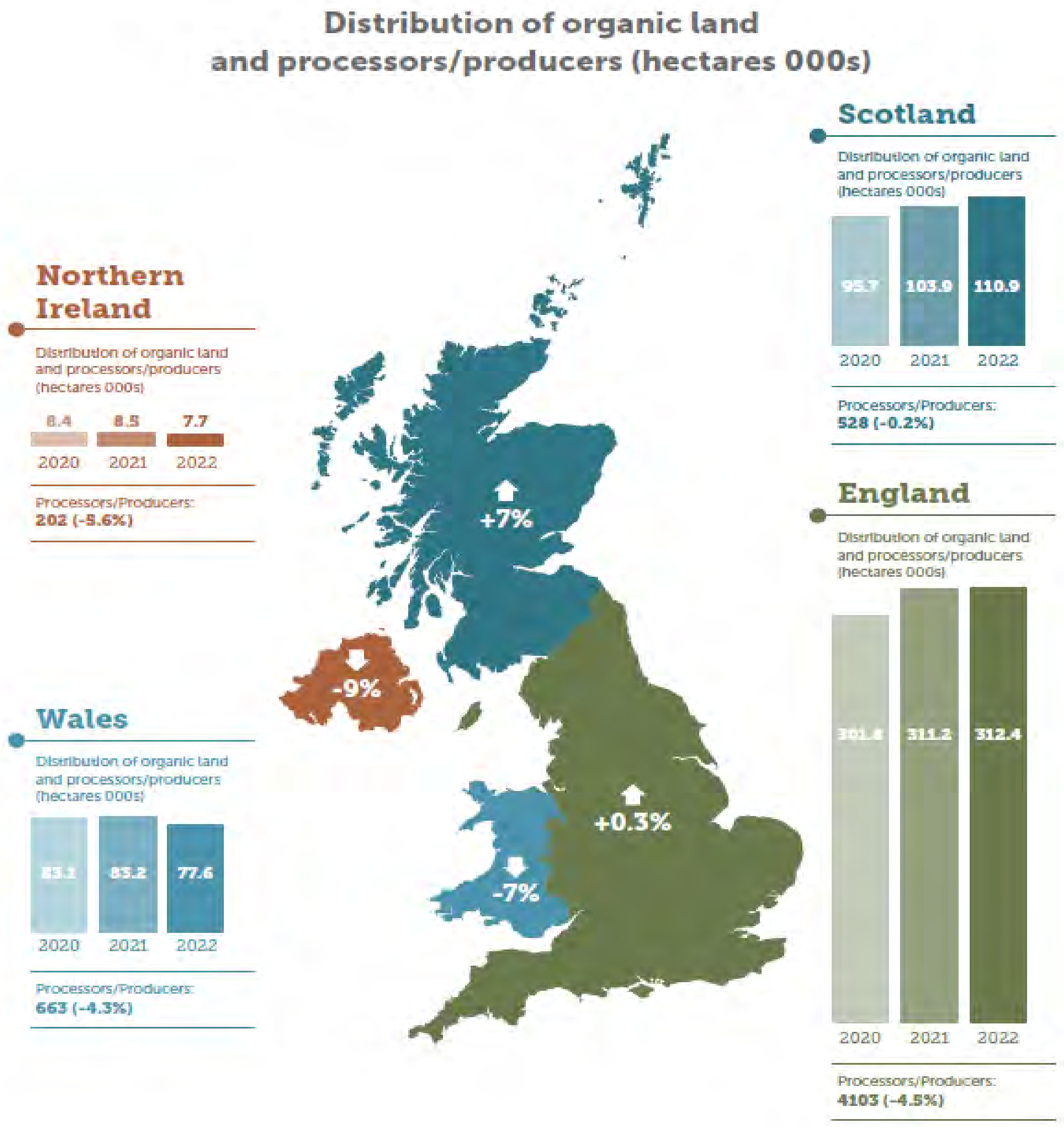
Organic Market Report 2024

Organic land increasing in Scotland while reducing in Wales and NI and remaining static in England

However, number of producers/processors in Scotland slightly down on last year – also falling across all other areas of the UK



Final thoughts on Scotland

- Is there an appetite for change to current organic payment rates and structure?
- Should the OAP take a strategic view of the type of organic land use that public policy/payments should aim to incentivise?
- Rather than a land target, would production targets be more appropriate for individual sectors where market demand is not being met by domestic production, for example organic cereals, vegetables or pulses?
- Can Scot Govt, through the Good Food Nation Act, and National Food Plan, prioritise organic in public procurement?

Questions?