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INDEPENDENT FREE NEWSPAPER ABOUT THE ORGANIC SECTOR

"The bulldozer and not the atomic bomb may turn out to be the most destructive invention of the 20th century" PHILIP SHABECOFF

BIOFACH & VIVANESS 2020
Even more and better!
12 - 15 February 2020 | Nuremberg, Germany

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BIOFACH & VIVANESS

Montse Mulé Cardona,
Editor, bio@bioecoactual.com

BIOFACH&VIVANESS 2020 Even more and better!

Nürnberg Messe. 12-15th February

BIOFACH2020
into organic

VIVANESS2020
into natural beauty

BIOFACH & VIVANESS 2020 expands its exhibition space with the opening of two halls, awarded for their modern design, concept and sustainability, to meet the demand for growth in the sector. The trade show director, **Danila Brunner**, explains that "The extra halls allow us to offer another 400 exhibitors a place at the combined trade fair. We are therefore continuing to write the success story of BIOFACH and VIVANESS and underpin their role as the key industry gathering and worldwide exhibition on the market. Specifically, we are adding Hall 7A (German exhibitors) to BIOFACH, while the international segment will expand into Hall 3A. VIVANESS will make its debut in Hall 3C in 2020. The overall concept offers us and our customers the ideal expansion and configuration options for the future!"

In this edition, more than 50,000 visitors from all over the world are expected to meet and interact with the 3,500 exhibitors from 100 nations that present their products at the combined fair BIOFACH & VIVANESS, world leader in the organic sector.

Using a new application that the organization has developed, participants will be able to find and access all the information about exhibitors, products and events. A map with GPS navigation will allow participants to reach easily their next meeting, scheduled presentation or seminar. More information at www.biofach.de/en/app and www.vivaness.de/en/app

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Know-how & Learning, New Products & Trends and Experience & Discover

In this edition the thematic areas arouse much interest: The **Fachhandelstreff** for specialist retailers; new products, newcomers and start-ups, **Best New Product Awards, BIOFACH Novelty Stand; Worlds of Experience: Olive Oil, Wine and Vegan.** There is a new special show: **All about water- is the basis of all life endangered?** Associations, institutions and companies will present their projects and products relating to water as an essential resource for life.

"Organic delivers". "Organic works". The BIOFACH congress

Key challenges for the future: clean water, fertile soils, biodiversity

The conclusions of the scientific studies, including those from Thünen Institute, confirm that organic farming offers solutions to the key

FOOD

BIOFACH & VIVANESS

challenges of the future, such as water protection, maintenance and new creation of fertile soils and the promotion of biodiversity. At the same time, it protects health by ensuring that no harmful products are discharged to soil, water or atmosphere, fights climate change thanks to its greater carbon sequestration and generates income in rural areas thus contributing to its sustainable development.

Prince Felix of Löwenstein, Chairman of the German Federation of Organic Food Producers (**BÖLW**), says: "These scientific insights show that organic represents a forward-looking economic system in which prices reflect environmental reality and food production is managed fairly and sustainably. Every hectare of organic land and every organic foodstuff are already making a contribution to a sustainable future for our planet. Organic farming is the way for us to really and effectively transform our foodstuff production".

Louise Luttikholt, IFOAM Organics Int. Executive Director, illustrates that: "Organic agriculture methods provide inspiration to millions – from farmers to consumers – and entire regions to work together to achieve a sustainable future that is fit for our grandchildren to live in. Increasing numbers of farmers are switching to organic agriculture, and more and more people are choosing organic products. But for the organic sector, "organic" means more than positive economic development. Ultimately, it's all about the fact that we want to show our environment, water, soil, biodiversity, climate and growers the respect they deserve."

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The Congress is the soul of the sector. Here many topics of interest are discussed, such as how politicians can encourage the transformation of agriculture and food culture to a sustainable basis; what policy and communication strategies are the most efficient ones; how organic farming can contribute to the fight against hunger; climate change and desertification; and what is the contribution of organic agriculture to the maintenance of biodiversity.

"Sustainable foodstuff production that does not exceed the limits of what the planet can support, and is embedded in our local communities. Foodstuff production that looks after the environment and provides people with a livelihood at the same time! For us it is important that customers, producers and politicians view the transformation of our eating culture as an opportunity. We must therefore seize it with both hands. Only when we really understand the huge benefits that organic offers will we be able to provide systemic answers, engage in meaningful discussions and give the transformation wings. Within the organic sector, we are also aware of the need to constantly refine organics, invest more in research and training for skilled workers, and commit at a political level to speed up the transformation process", says **Louise Luttikholt**.

Prince Felix of Löwenstein points out that "Organic agriculture and foodstuff production have a direct impact on all living things, from the smallest microbes in the soil and the animals on our farms to human health and wellbeing. Organic farms all around the world are already showing that it pays to deal carefully with our natural resources. Economy and ecology are not mutually exclusive. On a larger scale we can see that organic plays an important role that enables us in turn to achieve many important goals – on all levels: the Sustainable Development Goals (SDG) set by the UN, and also the environmental, climate and animal protection goals set by Germany and the EU".■

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IFOAM ORGANICS INTERNATIONAL

Nicole Kruz, Communications Coordinator.
IFOAM – Organics International. www.ifoam.bio

Organic Agriculture
Delivering Global Solutions to the Sustainable Development Goals

At IFOAM - Organics International, we believe agriculture should be a force for good, providing solutions to global issues like hunger, water pollution, biodiversity loss, and climate change. Organic agriculture looks at agro-ecosystems holistically and recognizes the interconnection between human health, nature, and production. The multi-faceted environmental, social, and economic benefits of sustainable agriculture can meet many of the Sustainable Development Goals (SDGs).

SDG 1: Eliminating Poverty

Worldwide there are about 500 million smallholder farming households living on less than $2 a day. Linking organic farmers to markets can help to increase household income and provide communities with greater access to nutritious food.

SDG 2: Eradicating Hunger

Ecologically sound organic production systems can achieve food security by increasing yields, improving disease and pest resistance, and reducing debt incurred from expensive chemical inputs.

SDG 3: Achieving Good Health and Well-being

Organic agriculture can help to improve soil fertility, protect biodiversity, mitigate climate change, safeguard water resources, and ensure fair prices and sustainable supply chains for farmers.

SDG 4: Ensuring Quality Education

Poor nutrition affects our ability to learn and education plays a huge role in raising awareness of good food. Building capacity around diet diversification by establishing organic school nutrition gardens is one effective way.

SDG 5: Reducing Gender Inequalities

Female farmers play a vital role in ensuring food security but lack of training or resources results in yields lower than those of male farmers. By increasing their access to resources and guaranteeing secure land tenure, female farmers can increase yields by 20 – 30%.

SDG 6: Securing Clean Water

Glyphosate-based formulations are the most widely used herbicides. Instead of spraying glyphosate, organic farmers use crop rotation and cover crops that can naturally suppress weeds and improve soil fertility.

SDG 8: Ensuring Decent Work and Economic Growth

Some of the world's unhealthiest jobs are found in food systems. The World Health Organization estimates that there are "3 million cases of pesticide poisoning each year". Sustainable food production can ensure safer works and better livelihoods.

SDG 10: Pursuing Reduced Inequalities

Farmers are often the most affected by poverty, hunger, and climate change. A food system based on the principles of organic agriculture, health, ecology, fairness and care can significantly improve their livelihoods.

SDG 12: Promoting Responsible Consumption and Production

To encourage a shift in our systems, national procurement policies can stipulate that food served in schools and public institutions is sustainably produced. As consumers, we can increase responsible consumption by reducing food waste and choosing to eat local, seasonal, and organic.

SDG 14: Protecting Life Below Water

Waste from industrial agriculture causes oxygen-starved areas devoid of life to form in our oceans. Eliminating the use of chemical fertilizers can end these dead zones and ensure our waters are safe for marine life.

SDG 15: Safeguarding Life on Land

Biodiversity loss is at an all-time high. Organic farmlands are a haven for wildlife, providing food and shelter for up to 30% more species than conventional farms.

Organic Delivers a Sustainable Future

IFOAM - Organics International also encourages you to join the Honest Food (#eathonest) campaign. Because in a world where food is sprayed with harmful chemicals, packed in plastic, and shipped around the globe, we need more Honest Food. Meet us at our congress session or visit

www.honestfood.bio!■

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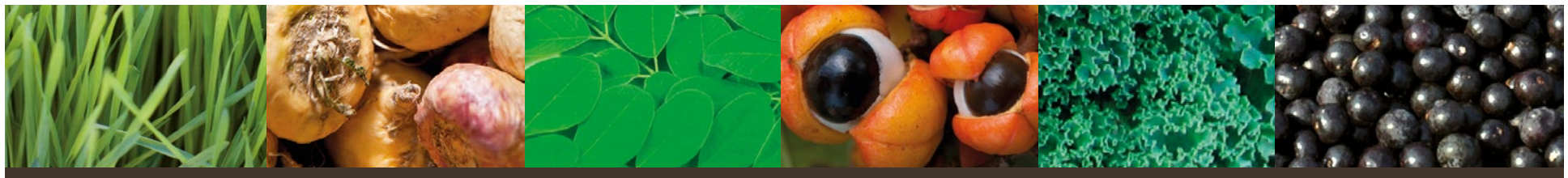

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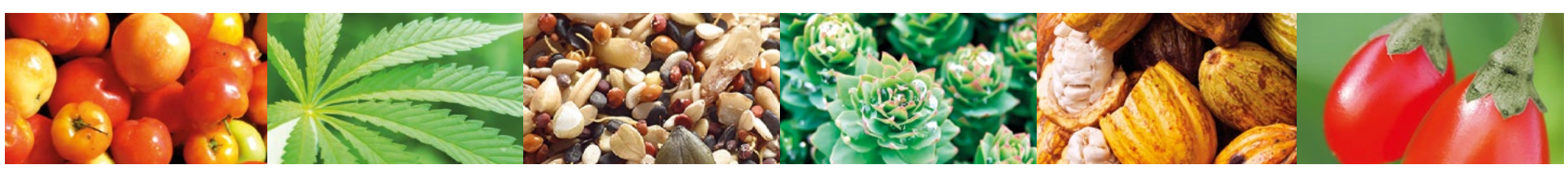

ORGANIC MARKET

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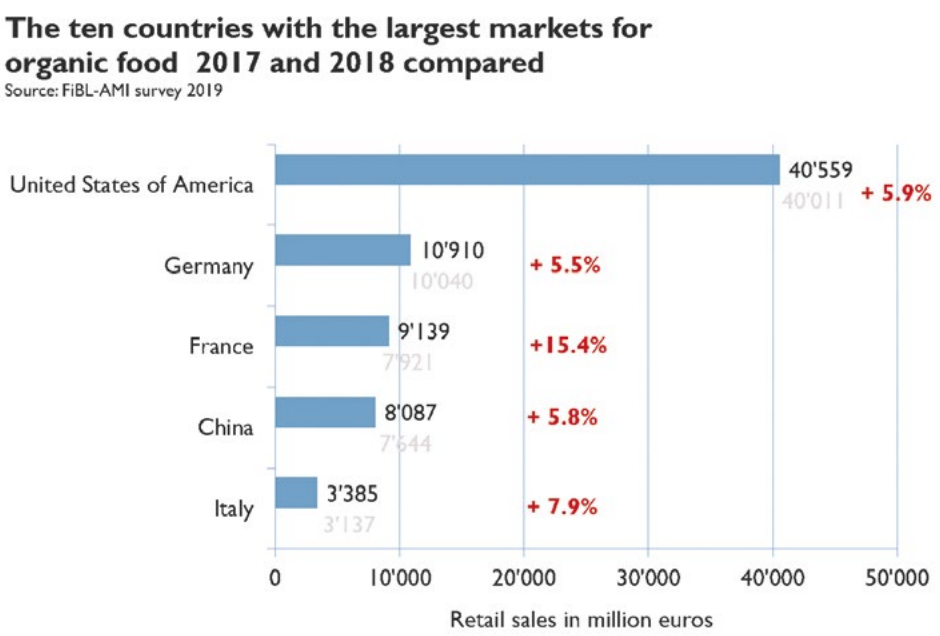
Organic market worldwide: observed trends in the last few years

FiBL

Globally, organic farming continues to grow and has reached wide acceptance amongst farmers, consumers, market actors, and policymakers. According to the latest available data (2017) almost 70 million hectares are under organic agricultural management, and this constitutes 1.4 percent of the global agricultural land. The organic market has grown to more than 92 billion euros. Figures already available for 2018 show that growth continues.

Introduction

Organic farming, which emerged in the first decades of the past century (Vogt 2000), continues to grow globally and has reached wide acceptance amongst farmers, consumers, market actors, policy makers and the public in many countries. Organic agriculture has garnered increasing official attention and support in the past years, in particular since 2000.



©FiBL. The ten countries with the largest markets for organic food 2017 and 2018 compared.

The Research Institute of Organic Agriculture FiBL has been compiling and publishing data on organic agriculture based on national data sources and data from international certifiers annually since 2000. The data are published annually in a yearbook (Willer & Lernoud 2019) and online (FiBL 2019). According to the latest FiBL survey on certified organic agriculture worldwide, as of the end of 2017 organic food and drink sales reached 92 billion euros.

Current market trends observed over the past years include continued growth, rising organic market shares, increasing imports, and general retailers gaining importance as marketing channel. Other relevant developments are that organic area and market shares are increasingly used to demonstrate progress towards SDGs 2 (zero hunger) and 12 (sustainable consumption), and that, while organic data availability improves, many challenges need to be tackled.

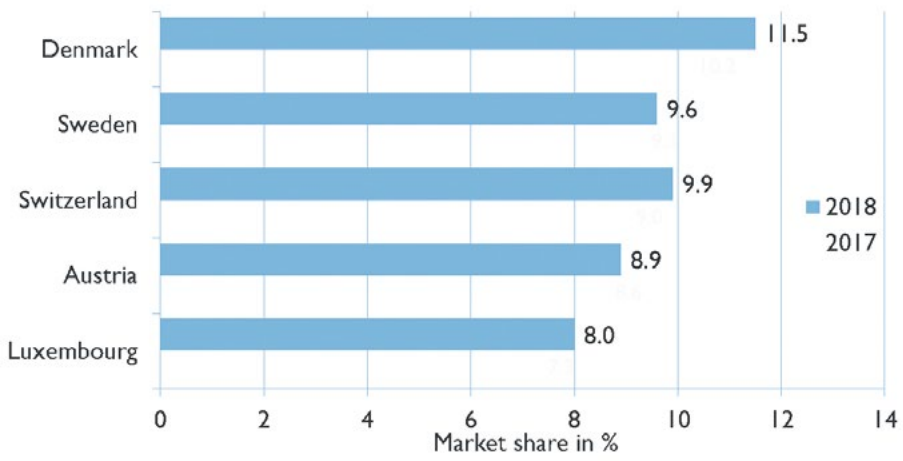
Trends

Trend 1: Growth continues - US and EU the biggest single markets – China catching up

As in the past, in 2018, the countries with the largest organic markets continued to be the United States (€40.6 billion), Germany (€10.9 billion), and France (€9.1 billion). However, a new trend is that China is gaining ground fast, due to rising consumer

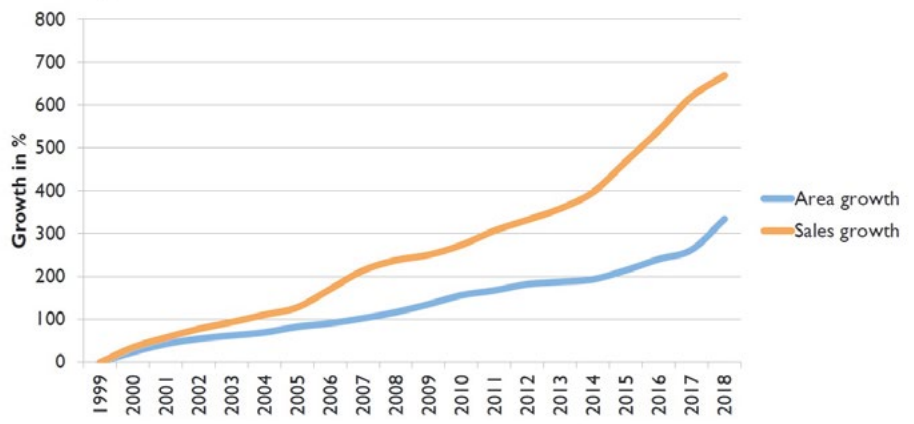
ORGANIC MARKET

The countries with the highest organic shares of the total market 2017/2018
Source: FiBL-AMI survey 2019



©FiBL. The countries with the highest organic shares of the total market 2017-2018.

European Union: Growth of organic agricultural land and of retail sales compared
Source: FiBL survey 2019



©FiBL. European Union Growth of organic agricultural land and of retail sales compared.

interest and food safety issues (€8.1 billion). The global market, which was at approximately €92 billion in 2017, amounted to more than 95 billion in 2018 (based on data available at the time of writing) and all major markets showed growth again, some even double digit

Trend 2: Organic market shares on the rise – highest shares reached in European countries

Globally, European countries account for the highest shares of organic food sales as a percentage of their respective food markets. Denmark has the highest organic market share globally (11.5 percent) and is the first country to pass the 10 percent mark. After Denmark, Switzerland (9.9 percent) and Sweden (9.6 percent) reached the highest shares in 2018

Trend 3: Imports on the rise

While there is little information on the amount of organic product imports and exports, it may be assumed that imports play an increasingly important role. In the European Union, the market is growing faster than the area of production. In Denmark, one of the major markets in Europe and one of the few countries that has import data; imports have been increasing by 180 percent between 2008 and 2017; and by 20 percent in 2016-2017 alone. It may be assumed that the trend is similar for the other big markets.

Recently, the European Union has published for the first time data on imports to the European Union, showing the imports in metric tons by country and product; the data is based on information from certifiers. As only the 2018 data are available, nothing can be said about trends yet. However, the data show that 3.3 million metric tons of organic products were imported and that a major focus was on feedstuffs, a lot of it from China and Ukraine. Furthermore, the imports of tropical fruit, mainly from Latin American countries, play an important role. The European Union plans to publish these data regularly from now on and it will be interesting to monitor the developments in the future (European Union 2019).

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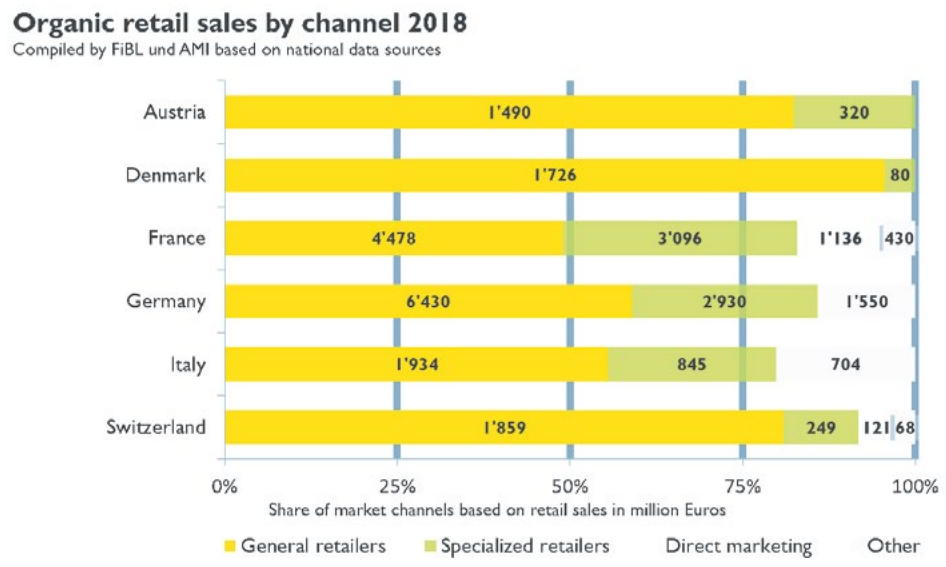
ORGANIC MARKET

Trend 4: General retailers are gaining ground

Figure 4 shows that the importance of the various retail marketing channels (excluding food service/ catering) differs from country to country. In the past, countries with strong involvement by general retailers showed steady organic market growth (e.g., Austria, Denmark, Sweden, Switzerland, and the United Kingdom). France and Italy, however, are good examples of countries with strong market growth, where specialized retailers play a very important role. However, France is the only country among those selected, where all marketing channels enjoy equal growth.

In Germany, the market has entered into a transition period. Supermarkets have become the driving force in the market, whereas specialised retailers are facing more and more competition. While in 2014, 33 percent of all organic products were sold in organic food shops, this number decreased to 27 percent in 2018, when general retailers sold almost 60 percent of the organic food.



2018. Source: FiBL & AMI.

Trend 5: Data availability, access and quality improve, but more efforts are needed

While data availability, data access, data variety and data quality have improved substantially since FiBL started its global statistics, there are a number of challenges related to organic data collection that need to be tackled. These include lack of data, irregular data collection, incomplete data, lack of common classifications, lack of common definitions, and inconsistent data. To improve the use of the indicators "organic area share" and "organic retail sales" by policy makers in order to assess the environmental performance of agriculture, higher quality data are needed. Better support for data collection from governments and international institutions could help to improve the situation.

Outlook

The development of the organic sector, which has seen the continuous growth of the organic market and land under organic management, reflects the dynamic and innovative nature of organic food and farming in response to the expectations of policymakers and the demands of consumers for high-quality food production!. ■

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PORTUGAL 2020

ORGANIC MOVEMENT

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Are we implementing Organic 3.0? - An opinion statement

Five years ago, BIOFACH discussed Organic 3.0. Are we now implementing it and are we on track? Yes, but...

India 2017: the global Organic General Assembly of the organic movement approved the strategic framework of Organic 3.0. The overall idea was to reposition organic in the world, to highlight strategic priorities and to start scaling organic into mainstream. Are we now really doing that? Has there been any progress or was Organic 3.0 just a huge discussion without any impact?

This article concludes that some parts of Organic 3.0 really brought change, but that other parts lag far behind expectations. Particularly in aspects where homework needed to be done, for instance in implementation of the strategic features, we can observe a lack of conceptional leadership.

Positioning Organic

IFOAM Organics International changed its mission from "*leading, uniting and assisting the Organic Movement*" into "*leading change, organically*", highlighting that the organic work does not just serve those that label products organic, but that it wants an overall change in the agriculture paradigm. Doing well in producing an added value for consumers and creating more income for the entire value chain is not enough. It is no longer about a competitive advantage, for example with better animal welfare standards or improved social benefits for farmers and their children. It is about overcoming industrialization in agriculture. In other words, not only organic people, but everything including competitors needs to become truly sustainable.

To start with a positive conclusion: Repositioning based on Organic 3.0 has worked. In fact, likeminded movements (e.g. agroecology, fair trade, community-based agriculture etc.), policy makers and people in general increasingly heard it, reacted positively and the picture of Organic is changing.

Organics for SDG and Policy

The Sustainable Development Goals (SDG) are the main and the only internationally accepted holistic development framework. The 2030 Agenda for Sustainable Development is mainstream and the organic movement shares the objectives. Interestingly, the debates about the SDG (e.g. the SDG Summit 2019 in New York of the head of states of the 193 signatory countries) see organic as part of the solution. We now hear very often that methods that are well embedded in organic standards, manuals and best practice guidelines (e.g. soil fertility management and ecological intensification) should be the standard. There is also consensus that industrialized agriculture is an important cause for

ORGANIC MOVEMENT

many threatening issues such as poverty or environmental destruction.

Sadly, recent developments make those issues we were scared of, such as climate change and loss of biodiversity, more dramatic. The Friday-for-future movement and green parties gain ground, which indicates growing public awareness about issues where organic is well-positioned. Solutions like farming organically are highly wanted.

To conclude: Yes, the organic 3.0 message of organic as a mainstream solution has reached policy makers at least at the global level. This despite the fact - against the views of numerous scientists – that many don't trust that organic can produce a sufficient quantity of food for a growing and more demanding global population. On top of that, policies have not yet sufficiently trickled down to national and local levels.

Market Realities

Organic 3.0 has the ambition to exceed the 1% (food market share) niche. While objectives cautiously were not quantified in the official document, expectations back then were much higher than reality nowadays. Countries like Denmark demonstrate that surpassing the 10% market share is possible. Other countries like France demonstrate double-digit growth. Overall, there is a very constant upwards trend and markets continue to grow at least in the economically well-developed areas in Europe and North America. However, in many countries, organic hasn't developed much. There, organic products are found only occasionally and organic is far from being mainstreamed. In other words, organic revolutions haven't happened and are not on the horizon, which may be good to maintain integrity and the possibility to have organic institutions and attitudes grow organically.

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Organic 3.0 features in scrutiny

The four Organic 3.0 features: "culture of innovation", "continuous improvement towards best practice", "diversity of ways to ensure transparent integrity" and "holistic empowerment from farm to fork" have not advanced much. There is a lack of real good answers about how to deal with novel technology (e.g. artificial meat, digitalization, new GM technology) and the innovation committees failed to do an effective job. Inside the sector, heavy competition and over orientation on minimum standards is still the rule rather than the exception. And there are no solution mechanisms for the problem that the farmers get very little of the price premium particularly in value chains in developing countries (e.g. coffee). True Cost Accounting (TCA) unfortunately stagnates. The concepts are very complex and hard to understand. We didn't manage to create a simplification and an understanding that one can't just introduce TCA, but only push towards it in the political debates and decisions.

To conclude: The organic leadership – including the democratically legitimized representatives and advocates, the think tanks, the business and service provider fora, the scientists etc. – is challenged to make progress in the identified key issues and to build structures that are able to cope with the challenges.■

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ORGANIC IN THE EU

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Prospects for the Common Agricultural Policy 2021 – 2027

IFOAM EU GROUP MAKING EUROPE MORE ORGANIC

Why the CAP needs a radical reform

At its inception, the Common Agricultural Policy (CAP) aimed at feeding thousands of Europeans after the damages caused by the Second World War. This goal was reached within a few years, leading to massive overproduction. Since the 1960's the CAP is the main support mechanism for farmers in the European Union (EU). As farmers' average wages continue to decline, food prices remain volatile and climate change impacts crop production, ongoing support for a struggling sector is key. Yet, direct payments, which form the first pillar of the CAP and amount to nearly 75% of the actual CAP budget, are not equally distributed. They are ill-targeted, incentivising farmers to only fulfil the policy's minimum requirements without contributing to the protection of the environment and climate.

This is why Europe needs a paradigm shift to a CAP that rewards farmers for providing good and healthy food as well as for caring for our public goods, like our soils, biodiversity or water resources. Organic farming contributes to a sustainable food and farming sector while satisfying citizens' preferences. Yet, a large-scale conversion to organic is only possible if the CAP's ambition is revised upwards, allowing more farmers to make the necessary additional efforts and investments.

The organic movement's vision for the new CAP

Since its creation, the CAP has undergone significant reforms. The creation of Rural Development (Pillar 2) was crucial for developing organic farming and other sustainable farming practices. In 2013, the new 'greening' component was added to the direct payments. However, due to the low ambition of requirements for greening, it has not led to a real change in farming practices. To make the CAP a policy that delivers on social, economic and environmental objectives, it should build on the Commission's proposal of June 2018 to raise the level of ambition. It should include the so-called 'New Delivery Model' and go even further by balancing environmental ambitions with a robust results-based framework.

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Result-oriented

Introducing a 'New Delivery Model' based on EU-wide results is a major

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ORGANIC IN THE EU

shift. The current management-based system centralises power within the European Commission, while the new model will decentralise power. Granting more flexibility to Member States and regions in designing their own Strategic Plans can help to adapt the CAP to local realities. Yet, this approach can only succeed with a robust European governance in place to avoid fragmentation of the EU's agricultural sector, to ensure a level playing field and avoid a "race to the bottom" among Member States.

On top of that, the indicators used to measure the environmental, social and economic CAP objectives should link to actual impacts as much as possible. This would ensure that measures that have a real effect on the ground are financially rewarded. Moreover, the list of CAP indicators should be evaluated and complemented on an ongoing basis. During the design phase of their CAP Strategic Plans, Member States should also be required to analyse the health of their organic farming sector, enabling them to draw strategies for the sector's further development under the next CAP.

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Tackling causes rather than treating symptoms

The CAP revision should reward farmers who deliver public goods and leave behind the logic of compensating farmers only for "lost revenue". It is important to allow Member States to offer attractive premiums to farmers who wish to do more for the environment and climate. A combination of the different tools of both CAP pillars should be encouraged, such as the multi-annual agri-environmental measures of Pillar 2, for example for conversion to organic farming, and the annual eco-scheme (a new tool that can support sustainable practices, such as organic farming) of Pillar 1.

Avoiding a race to the bottom

Strong common safeguards should counterbalance the increased flexibility of the CAP. Ambitious 'ringfencing' of at least 70% of the entire CAP budget across both pillars

The CAP revision should reward farmers who deliver public goods

can avoid a downward spiral for the climate and the environment. Eco-Schemes should be better defined and favour farming systems that provide many environmental benefits, including organic farming and agroecology. Furthermore, the new CAP should keep and reinforce the 'no backsliding' principle that ensures that Member States cannot roll back existing environmental measures or ambitions.

Challenges and ongoing negotiations

Disappointing vote by the previous Agriculture Committee of the European Parliament

In April 2019, the previous Committee on Agriculture and Rural Development (COMAGRI) voted on changes to the CAP proposal from

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ORGANIC IN THE EU

the Commission. The European organic movement finds that these are inadequate to meet environmental challenges and the needs of the sector. Some positive elements of the AGRI Committee's vote include the ringfencing of 20% of direct payments for Eco-Schemes and the limitation of the flexibility for moving money from Pillar 2 to Pillar 1. Still, the maintenance of the direct payments model and the will to attribute at least 60% of the Pillar 1 budget to untargeted "income support" shows that the 'business-as-usual' approach prevailed with the previous AGRI Committee. Moreover, by removing the former obligatory Ecological Focus Areas (EFAs) and limiting the protection of wetlands and peatlands to Natura 2000 areas, the European Parliament has weakened the minimum environmental requirements that all farmers must respect (the so-called conditionality).

Direct payments, which amount to nearly 75% of the actual CAP budget, are not equally distributed

Factors influencing the upcoming negotiations

The composition of the European Parliament has changed with the elections in May 2019. This means that the newly elected Members of the European Parliament will have their say in the reform process before the final vote in plenary in early 2020. At the time of writing this article, a new rapporteur and shadow-rapporteurs are about to be appointed on the three regulations making up the CAP reform, namely the Common Markets Organisation (CMO), the Horizontal Regulation and the Strategic Plans.

Concerning the Strategic Plans regulation, which is the most controversial, new compromise amendments may be added to the original report of the AGRI committee. Negotiations within the European Parliament may also impact the vote as the Committee on Environment, Public Health and Food Safety (COMENVI) is an associated committee under rule of procedure 57. COMAGRI and COMENVI will need to cooperate on the most pressing issues, such as the CAP's green architecture, to ensure a comprehensive approach and a common position before the trilogue negotiations with the Commission and the Council, foreseen in 2020.

123rf Limited©andreykuzmin. European commission official building entry.

IFOAM EU strives to influence the new compromise amendments in order to ensure that environmental measures from both pillars are ambitious and designed effectively. In addition, we aim at the inclusion in the final compromises of an obligation for all Member States to conduct an analysis of their organic sector's production, expected demand and needs within the framework of their National Strategic Plans.■

ORGANIC IN THE UK

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UK's organic market: expected to exceed £2.5billion by 2020

The UK's organic market is in good health and enjoying strong growth for its 8th year. Soil Association Certification's Organic Market Report, published every year in spring, takes a holistic look at the market. In 2018, the UK's organic market was worth £2.33 billion after a 5.3% growth in sales, well ahead of the non-organic market. The figure represents the highest ever value placed on the organic market, following seven consecutive years of growth, and means that almost £45 million is spent on organic every week in the UK. Within the broader food and drink market, organic is now around 1.5% of the market, and we expect it to exceed a value of £2.5 billion by 2020.

Sales performance is strongest in the home delivery channel, recording +14.2% in 2018, while grocery continues to show strong sales, fuelled by many of the successful brands in the tea, cereals, home baking and oils categories. Traditional 'entry point' sectors like dairy, fruit and vegetables have had slower sales as they compete with much lower shelf prices on non-organic.

Wider issues are having a big impact on customers' food choices. To try and understand some of the reasons behind this trend, Soil Association Certification conducted consumer research during the summer of 2019, and found that sustainability is a rapidly growing driver for consumers when they shop for food. People are not choosing products just because of the benefits these products bring to them; they are choosing products because of the wider benefits they bring to the environment. This means there is a major opportunity for organic. The explosion of interest in environmental issues has driven a renewed focus for organic in the UK and should guarantee continued growth in sales despite any economic uncertainty.

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Through campaigns like Organic September, our month-long focus on organic, we are seizing the opportunity to communicate clearly with the changing customer, to raise their interest in organic and to ask them to switch to organic options. We also need support from the UK government and from the supermarket chains, as they account for 66% of sales of all organic in this country. We are also encouraging more organic products within the foodservice sector, getting customers used to eating organic 'out of home'. We know that UK shoppers want more sustainable options; it's now time for all of us to come together to promote clearly the benefits that organic brings to people and the planet.■

FOOD

ORGANIC IN SPAIN

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Large caps land in the Spanish organic market

The rapid incursion of large corporations in the sector is changing the traditional structure and organization of the Spanish organic market. This is creating a very different picture compared to just five years ago, not only in terms of market growth, but also in terms of its structure, organization and balance.

The situation

The recent purchase of the Ebro Foods organic division (with brands such as Vegetalia or Celnat) by Midsona consolidates an increasingly strong trend that began a few years ago. Thus, the inclusion of Biográ in the structure of Idilia Foods, owner of brands such as Colacao or Nocilla; the purchase of Biogran by the Dutch company Wessanen; or the acquisition of Natursoy by Nutrition & Santé are examples of this phenomenon of concentration of volume and power throughout the commercialization chain.

This concentration process is also

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companies, as with the recent merger of Veritas and Ecoorganic to create the largest group of organic supermarkets in Spain; or the merger of the French group of manufacturers Léa Nature with Biocop, a pioneer family business based in Barcelona.

Why so fast?

It seems that the rise of domestic consumption and its constant double-digit growth over the past 10 years have surprised the Spanish market with its structures only half-done. The structure of the Spanish sales channel, characterised by a greater concentration and variety of establishments compared to the rest of Europe (3.4 stores per 1,000 inhabitants vs. 2.6 in Europe in 2017, according to Nielsen data) has contributed to this phenomenon. Spain faces the same market dynamics as its main European neighbours, but has a weaker sectoral organization. Organic stores associations such as Biocoop in France, intersectoral and interprofessional associations such as Gard in France; AIAB in Italy; or BÖWL in Germany, are structures that have been created and consolidated in time to deal steadily with the arrival of large capitals and concentration movements to the organic sector.

The consequences for the Spanish market and its foreseeable evolution.

The latest MAPA study of the sector (2017 data) reports a 40-45% market share for the specialist channel and a 35-40% share for the conventional channel. Their forecasts for 2020 reverse this proportion: 35% versus 45%. But everything indicates, given the rapid evolution of the conventional channel in the last two years, that the proportions have already changed and will continue to do so in the short and medium term, even exceeding these forecasts.■

ORGANIC AGRICULTURE

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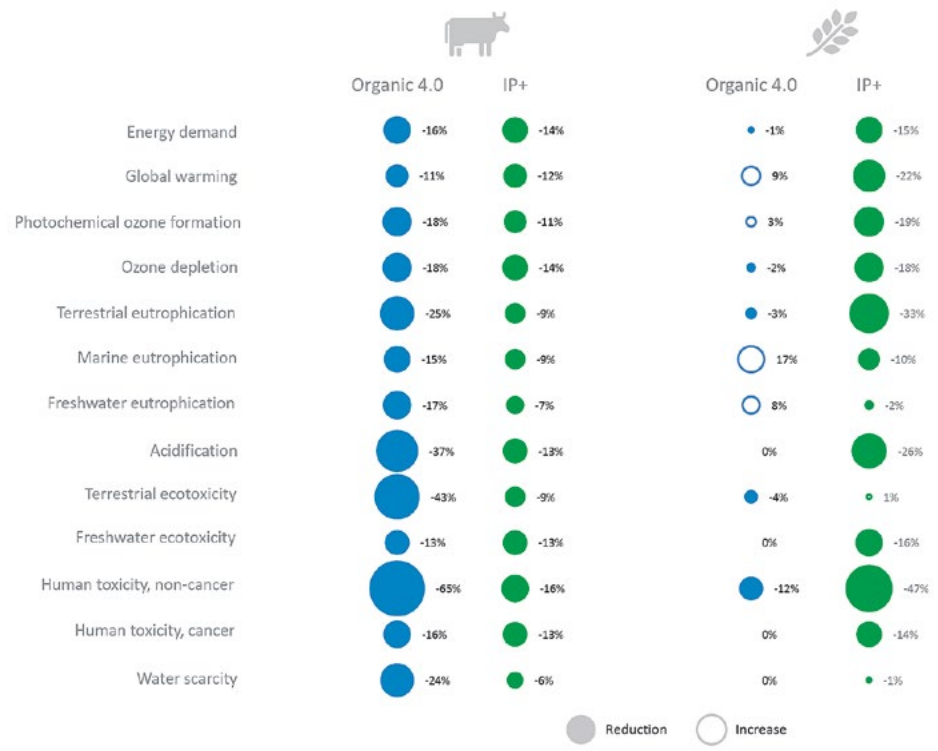
Ways to further improve the sustainability of agriculture systems

The necessary transition towards sustainable agricultural and food systems

Agriculture and food systems need to provide enough nutritious and high quality food for a growing population. The intensification of agriculture has led to a significant increase in production and food security globally. However, current agricultural practices are a major cause of environmental problems (e.g. biodiversity loss, GHG, pollution, soil degradation). Therefore, an environmentally sound and sustainable transformation of the agricultural system is needed. Overall, organic agriculture is known as a particularly environmentally sustainable form of agriculture with positive effects on environmental parameters like soil fertility, climate mitigation, biodiversity, resource use and animal welfare. Organic agriculture, therefore, can contribute to the accomplishment of multiple Sustainable Development Goals (SDG), such as climate action (SDG 13), responsible production & consumption (SDG 12), life below water & on land (SDG 14 & 15), zero hunger (SDG 2), clean water (SDG 6), good health & wellbeing (SDG3) and decent work conditions (SDG 8). Accordingly, the Federal Government of Germany, in its Sustainability Strategy, has set out the goal to increase the organically farmed area to 20% of the total agricultural land by 2030, as compared to 8.21% in 2017. Yet, organic agriculture can only be part of the solution. Conventional farming will need to become more sustainable as well. In this transition process, organic farming can play a central role as a source of ideas for the further improvement of sustainable practices.



Despite its proven benefits, there are still some limitations in the current organic agricultural system. For example, critics primarily address the lower yields compared to conventional farming (-19% to -45%) or the use of fungicides that are not in line with the principles of modern plant protection, e.g. copper. Defined standards and legally binding rules (cf. EU regulatory framework on organic production) are unique to organic agriculture and a major factor for its success. At the same time the rigid set of principles and prohibitions may jeopardize the uptake of new innovations and hinder further development of the current system.

FOOD

ORGANIC AGRICULTURE

The way forward for organic and sustainable farming systems

In a recently published study commissioned by the German Environment Agency, Haller et al. (2019) critically analysed the strengths and weaknesses of organic agriculture and formulated scenarios for the development of both organic and conventional systems. Scenario Organic 4.0 takes into account technological progress and innovation to reduce yield gaps and foresees a stronger orientation on sustainability, e.g. by reducing concentrate feeds in dairy systems. The strong focus on prohibitions would be replaced by case-by-case assessments of both old and new technologies. The IP+ Scenario further develops conventional systems and makes the objectives of integrated production obligatory. This scenario includes, for example, a reduction of the maximum N input per hectare and year to 120 kg, mandatory crop rotations and restrictions on pesticide use.

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Farm-level simulations provided detailed insights into the potential impacts of these scenarios on the environment (Graph 1). For the Organic 4.0 scenario, results show that reducing the yield gap leads to a higher eco-efficiency in organic farming (impacts per kg product). However, this is challenged by higher crop nutrient needs and increased plant biomass on the field resulting from the increased yields and use of organic manure. This increases the risk of N losses in organic systems, leading to both higher global warming and water eutrophication potentials per hectare of farmed land. In Organic 4.0 dairy systems, the significant reduction of concentrate feed leads to substantial improvements in the environmental performance. With respect to the IP+ scenario, reduction in the fertilization level and concentrate feed lead to an improved environmental performance of conventional crop and dairy systems and thus reduce the performance gap to organic farming. To conclude, the model results show once again that high global eco-efficiency (environmental performance per kg of food) does not necessarily go hand-in-hand with high local environmental performance (per hectare) and highlights the trade-off between these two objectives.

In order to facilitate the necessary shift, further improvements are necessary. For a long time, digitalization in the agricultural sector was only seen as benefitting high-input, large scale farming systems. However, in the meantime, precision agriculture is also showing new possibilities for organic and low-input farming, e.g. precise weed control, early disease diagnosis, optimized fertilization by drones or controlled traffic farming. In the realm of plant protection, the development of more effective and less harmful measures is crucial. Existing products and methods must be optimized and new ones developed, e.g. new botanicals and biocontrol organisms. Moreover, to improve the eco-efficiency of organic farming systems, modern varieties that allow for higher yields under low-input cultivation practices are required. This must also include more resistant varieties, able to cope with more extreme weather conditions. Therefore, strong efforts in basic and applied research have to be made to further improve both organic and conventional agriculture systems.

'*Ways to further improve the sustainability of agriculture systems*' is a project funded by the German Environment Agency (UBA). Authors: Haller, L.; Thompson, M.; Riedel, J.; Moakes, S.; Stolze, M.; & Niggli, U. (2019). ■

Mark Smith, *Director General at NATRUE* | *www.natrue.org*

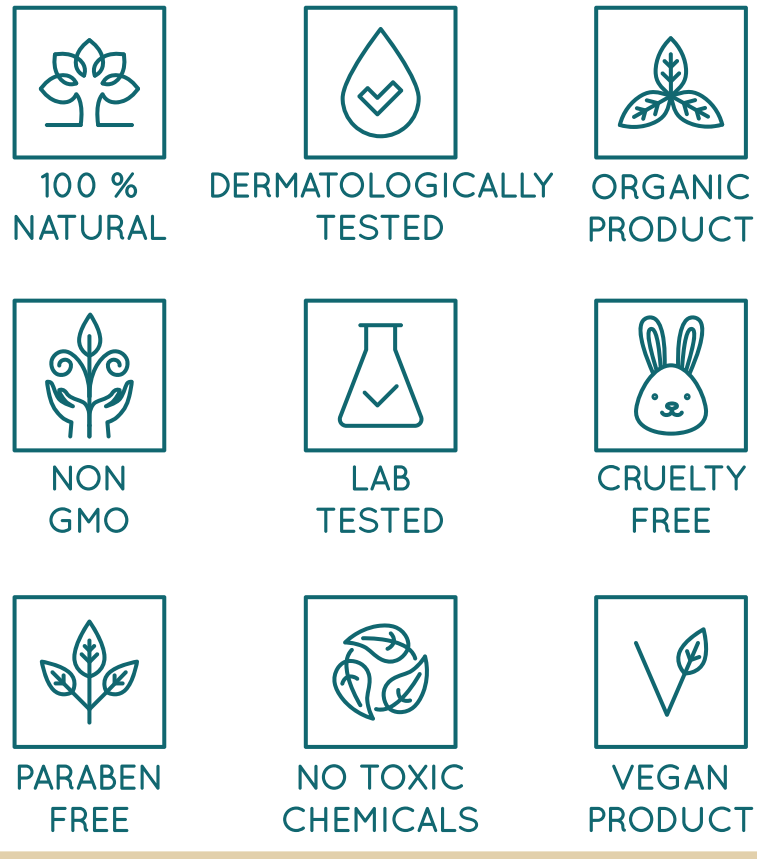
Organic Cosmetics into 2020

Conscious consumerism and interest in natural and organic increase year-on-year. New products, new markets and new channels for cosmetic products to reach a growing consumer base is reflected in the interest from indie brands, to established pioneers, to conventional companies looking to enter the sector with both certified and non-certified brands.

Looking into 2020 a 'green new deal' for Europe can align with the sector's values

Despite an increasingly diverse and competitive landscape, still affected by the lack of better regulation to harmonise the control of misleading natural and organic claims across the Union, the natural and organic sector still outperforms the cosmetic industry as a whole where known drivers for consumers range from hazard avoidance to environmental consciousness; from animal welfare and veganism, to being simply part of a holistic lifestyle.

Nevertheless, for consumers to continue to have access to a wide and diverse range of authentic product categories from decorative cosmetics to hand creams and shampoos, we must consider that ensuring appropriate ingredient regulation, to guarantee a wide palette of non-GMO natural and organic raw materials without the need to arbitrarily substituent for (semi-)synthetic substances, goes hand-in-hand to assure the quality finished products consumers expect.



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A core pillar of NATRUE is advocacy: to speak up for the sector on legislation that may impact the sector. As a representative with a seat at the EU Commission's Working Group on cosmetic

products, NATRUE sees the following as hot ingredient topics for 2020:

- **Endocrine-disrupting chemical substances (EDCs):** EDC regulation can impact any substance or mixture, natural or not. In 2019, following two publications on this topic in 2018, the EU Commission ran an open call for data on ingredients with potential ED properties used in cosmetic products related to 14 priority substances that would be risk assessed by the SCCS. Natural substances on the list include Benzyl salicylate, Genistein and Daidzein, as found in soybean extracts, and Kojic acid. Hand-in-hand the Commission have developed a Roadmap Fitness Check to assess whether relevant EU legislation on endocrine disruptors delivers its overall objective to protect human health and the environment by minimising exposure to these substances. The outcome of the Fitness Check is expected in 2020, which will feed into a wider debate on how the results will be implemented into actions for all cosmetics depending on the proposed criteria. There is a significant political, NGO and consumer pressure, and so it will undoubtedly be a top issue for the new Commission.

- **Fragrance allergens - new labelling:** Following the 2012 Opinion of the Scientific Committee on Consumer Safety (SCCS), there was a recommendation for a large number of additional fragrance allergens for labelling totalling up to 87 from the current 26 allergens to be listed by law. A policy Roadmap was proposed in 2018 that included various options from no change, to on-pack or off-pack labelling of the additional allergens. In 2019 selected stakeholders were interviewed and a timetable for a public consultation prepared prior to further analysis of the proposals' impact in 2020. The impact of further labelling is not insignificant for natural and organic cosmetics, and requires consideration for aspects such as transparency and proportionality.

- **Microplastics:** In 2019 European Chemicals Agency (ECHA) submitted to the European Commission its restriction proposal for microplastic particles that are intentionally added to mixtures used by consumers or professionals. A public consultation on ECHA's restriction dossier was concluded in Q3 of 2019. The registry of restriction excludes polymers that occur in nature as well as soluble polymers not in the form of a particle. Synthesised polymers derived from natural origin would be in scope if in a solid particle form unless these would fulfil interim biodegradability criteria. Liquid polymers/polymers in solution are not treated as particles by definition, and do not fall under the scope of the restriction. A post-consultation regulatory proposal is expected in 2020.

With the Commission and Parliament in-place NATRUE welcomes agendas that focus on integral aspects of the natural and organic sector such as sustainability and protection of biodiversity. Policy in these areas is no longer a choice but an inevitability.

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Looking into 2020 a 'green new deal' for Europe can align with the sector's values. Proposals should encourage further development of the circular economy and plastic strategies to reduce waste, foster green innovation and lower environmental impact; enhance the bioeconomy to reduce fossil fuel dependence; secure organic and non-GMO supply chains for producers; better control of misleading natural and organic product claims.

As the non-profit International Natural and Organic Cosmetics Association, NATRUE has a unique, and privileged, position permitting direct participation and contribution to legislative change. NATRUE's involvement is crucial to providing sectoral perspective, clarity and expertise to regulators and stakeholders at European and international regulatory decision-making level.

Conscious consumerism and interest in natural and organic increase year-on-year

NATRUE stands for a high-quality benchmark that avoids arbitrary exceptions and maximises content to avoid diluting the integrity of natural and organic product claims to keep greenwashing off the shelves. Consumers can be assured that in seeing the NATRUE seal they can enjoy natural and organic cosmetics that really deserve their name. Into 2020 the NATRUE Label continues to expand; exceeding 6300 products covering more than 250 brands in 30 countries worldwide.■

ORGANIC PACKAGING

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Navigating the sustainable packaging minefield

Which country in Europe would you think has the highest per capita creation of municipal waste? The answer might surprise you. It's Denmark, whose citizens produce 777 kilos of waste per person each year, compared to the European average of 480 kilos. Another Scandinavian country, Norway, comes in second place. Since Scandinavia is so strongly associated with all things organic and sustainable, this might seem counterintuitive. But if this Nordic anomaly tells us anything about the bewilderingly complex business of packaging, it is to expect the unexpected.

A good example is the case of UK supermarket Morrison's decision to remove plastic wrapping from cucumbers, under growing pressure from consumers and the media. Everyone, it seems, agrees that the shrink-wrapped cucumber is a text-book example of excessive packaging. But when, 18 months later, Morrison's examined the effect of unwrapping its cucumbers, it discovered that it had led to a third more food waste.

The direct link between food waste and packaging is what complicates all decision-making in this area. Research by the charity WRAP shows that consumers often express concern about excessive packaging, but have limited awareness of packaging's role in preserving food. The reality is that reducing packaging and cutting food waste are now judged equally important priorities.

Much of the current focus on packaging innovation is in developing plastic alternatives, especially in the area of biodegradable and compostable materials. As a result, we have seen many large retailers switch to compostable bags. But research published by the University of Plymouth shows that, here too, the picture is complicated. The researchers showed that biodegradable carrier bags remained fully intact (and functional!) three years after being submerged in seawater or buried in soil. Many 'compostable' bags only biodegrade in industrial composting facilities – and far too few ever reach them. At the same time, plastic alternatives are known to contaminate conventional recycling facilities.

So, questions over the usefulness of bioplastics continue. Is growing plants for bioplastic a sensible use of resources (think of the need to divert land from food use), for example? What about the pollution from additional use of fertilizers and pesticides? A growing number of brands, however, now proudly proclaim themselves plastic-free. London-based organic cereals pioneer Alara Wholefoods, for example, has switched to a 100% 'garden compostable' material made from plant-fibers, and international organic produce distributor Eosta has also moved "decisively to entirely compostable bioplastics".

Plastic reduction is another key strategy. Here, organic yoghurt producer Yeo Valley was an early innovator, developing cartons with thinner, lighter plastic walls, strengthened with a tear-off layer of recyclable card. The commercial opportunities for innovation in this area are quickly evolving too. Take the Swedish eco-packaging specialist Ecolean, which earlier this year won a major contract to supply its super-lightweight pouches to Chinese drinks giant SQZ.

Courtesy of Jim Manson. Waitrose Unpacked zone

One of the hottest trends in food retail is packaging-free

Meanwhile, there is a growing opportunity to use packaging to communicate brand values, and one of the hottest trends in food retail is packaging-free. In the 1970s and 1980s bulk ingredients bins were a staple feature of almost every health food store. Now they are making a comeback – and not just in smaller independents. Major supermarket chains are also trialing packaging-free zones. UK supermarket Waitrose recently unveiled its 'Unpacked' refill station, while Marks & Spencer claimed a supermarket 'first' by offering a reusable container incentive at its food-to-go areas.

Specialist zero-waste stores are also opening – Unverpact in Germany, Unpackaged in London and Italian franchise Negozio Leggero among them. The real test for this bold and uncompromising model –in these stores no products at all are packaged– will be whether consumers see it a practical proposition. Sadly, one zero-waste pioneer, Austin, Texas-based Ingredients recently folded. Its owners concluded (like Kermit), "it's hard being green".■

FOOD