Comparing International Organic Sector Strategies and Action Plans

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Introduction

The world is changing quickly. Growing consumer preference for sustainable products is fuelled by the reality that the planet is in crisis. Climate change, biodiversity loss, polluted waterways and other environmental and social pressures are changing the way people think about their world. There is now a significant consumer movement towards products that are based on less extractive, more ecologically friendly production methods.

Worldwide, organic farming is recognised as a way of farming that responds to consumer demand for more environmentally friendly farming practices. Organic production systems provide consumers with product options that mirror changing world views. Global sales of organic products have exhibited consistent rapid growth every year for over a decade. In 2019, global sales of certified organic products reached Euro 106.4 billion (187.26 billion NZD) (FIBL and IFOAM).

New Zealand's organic sector has achieved significant growth and has the ability to grow much more. At nearly NZD $723 million, the New Zealand organic sector has increased in value by 20% since 2017. (Organics Aotearoa New Zealand). While there is significant demand for organic products worldwide, the pathway to meet this demand – both domestically and abroad – requires a detailed strategy and action plan.

Comparative Analysis

This report presents a comparative analysis of organic sector strategies and Organic Action Plans (OAPs) in a range of other nations, all of which play a significant role as trading partners in New Zealand's economy.

This study identifies policy-relevant findings and key themes from other countries in order to enable New Zealand's Organic Sector Strategy team to learn from others' experiences. This report aims to provide both New Zealand policymakers and organic sector leaders with insights into the approaches taken by a sample of New Zealand's trading partners.

The report highlights strategies from the following locations for various reasons. These are:

1. **The European Union** is one of New Zealand's largest trading partners. Its Farm to Fork strategy is at the heart of the European Green Deal, an economic growth strategy that aims to overcome climate change and environmental degradation.
    a. **Denmark** is known as the world's most organic nation. Its organic strategy has won several international awards and has been commended as the 'best' strategy for organics by IFOAM. Denmark as a country has the world's highest annual per capita organic consumption – NZ$605.4 (344 Euros). Organic food accounts for 12.1% of total food sales (Pekala).
    b. **Ireland** has an organic sector comparable to New Zealand's in regards to size, organic strategy and policy development stage, as well as sector challenges and opportunities.
2. **The UK and the US** both are significant trading partners for New Zealand's organic products. The US is the largest organic market in the world, organic food accounting for 5.8% of total food sales (Organics Aotearoa New Zealand). Both the UK and the US are going through significant political transitions and are rapidly developing policies to address climate change.
3. **Australia** is New Zealand's neighbour and closest trading partner. Australia does not have a national organic strategy, but has the largest amount of acreage under organic management in the world.

This study focuses on national-level strategies, each written either by government departments or by national organic sector organisations that are engaged with their respective governments at a high level.

This research was conducted as a desktop review of available strategies and supporting documents that were available online.

Key Themes

The countries studied are taking a variety of approaches to developing their organic sectors. The strategies surveyed reflect diversity in cultural norms, geographical considerations affecting growing conditions, political systems, assessments of environmental issues such as clean waterways and climate change, and assessments of human health.

Regardless of the above variables, five target areas hold a core position in all of the organic sector strategies and plans surveyed. These are:

- Government Policy
- Training and education

- Research, innovation and development
- Producer support
- Market development

Breaking down these five target areas, this study found that eight themes ran consistently throughout the national organic strategies and plans reviewed.

The themes are:

- Organic production should be considered a 'common good' because its benefits are far-reaching, helping nations reach specific environmental, economic, health and climate goals.
- Organic agriculture has a significant role to play in both mitigating and adapting to climate change.
- Organic farming has been widely used as a means for rural development.
- Governments provide financial support for organic conversion in most of the countries reviewed.
- The organic sector should have representation within government agricultural departments and should always have a seat at the table when discussing climate change, soil health and agricultural policy.
- Organic production needs to be integrated into multiple policies, across multiple agencies.
- Market growth for domestic organic production significantly benefits from public procurement.
- Incentives are widely used to reward organic farmers for positive practices that deliver on environmental challenges.

Organic Strategies

Organic strategies and action plans are mechanisms for achieving a more integrated and balanced approach to organic policymaking, providing road maps for commercial growth.

Each reviewed organic strategy was developed based on an analysis of the strengths and weaknesses of that country's organic sector. In each case, that analysis became a platform for identifying key actions to support the sector's growth.

Focus Areas

Five main target areas were found in each of the organic strategies and plans reviewed. Specific actions to achieve strategic goals are organised within these focus areas.

The five areas are:

- **Government policy:** It was clear from every reviewed organic strategy that organic farming has an important place in each country's future agricultural goals and thus requires a coherent legal framework to support it. Policy goals include:
    - simplifying access to organic farming through regulatory channels
    - ensuring that organic farms and businesses have a seat at the table in the development of policy to address the climate crisis
    - focusing on policy solutions supported by scientific data, with verification measures aimed at meaningfully reducing agriculture's impact on climate change
    - reviewing and addressing economic and policy issues that discourage uptake of organic land management.

- **Training and education**: Organic production is highly specialised and requires specific education and knowledge. Almost every national organic strategy recognises a shortage of people with the needed skills and experience. This is especially true for issues of managing pests, diseases and weeds; finding alternatives to copper; reducing energy use; utilising knowledge of organic farming to help non-organic farming access greener solutions, and sourcing compatible ingredients (seeds, feed, etc.).

  To remedy these gaps in technical skills and knowledge, the reviewed strategies focus on the following areas:
    - on-farm education and training
    - integrating organic farming training into college, university and technical school curricula
    - government training across ministries and embassies
    - promoting organics in municipalities and schools through educational activities and materials.

- **Research, development and innovation:** The important role of R&D/I is explicitly mentioned in all plans. Many markets have organic-specific research centres, while others have integrated organic production options into all publicly funded research.

  There is a widespread acknowledgement that research in all areas is needed. Historically, research in holistic farming management systems has been under-resourced.

  Research has a continuing focus on improving efficiency and performance, particularly in relation to climate change. More research is needed in order to develop tools for life-cycle analysis and data collection, especially around carbon sequestration.

- **Producer support:** To strengthen the organic supply base, most countries utilise government funds to support producers who are in conversion to organic or are maintaining farmland organically.

  Organic strategies and plans target this support at specific sectors. Strategies also include advisory services and infrastructural investments. Countries within the European Union have used Rural Development Funds for investment support and have used other structural measures to facilitate increased innovation and develop higher-value commodities that give farmers better economic returns. This in turn fuels local economies.

  Supporting organic production can also target specific government policy outcomes. Governments provide financial incentives to:
  - reduce the use of nitrogen
  - increase production in key areas to help meet local and export demands
  - reduce barriers to organic pesticide management.

- **Market Development:** There are two main ways to stimulate market growth for organic products: increasing export growth and promoting domestic demand.

  Many EU countries promote domestic demand through marketing initiatives and public procurement. Focus has been on consumer trust and awareness campaigns, especially with national organic marks; building cohesive industry-level marketing strategies and plans; and government procurement for schools, hospitals, government canteens and other public settings.

  Promoting export growth includes collaborating with embassies to build local dialogue for organics, relevant government ministries taking part in export promotion activities, and reinforcing dialogue with public institutions on strategic export markets for organic products.

European Strategies

European Union

The European Union has set a target for Europe to be a carbon-neutral continent by 2050. The European Green Deal has been set as the framework for achieving this target. At the heart of the

Green Deal sits the Farm to Fork Strategy. The emphasis on organic farming has been clearly set out by its goal of 25% of agricultural land under organic farming by 2030. This significant move highlights the EU's ambition towards a large-scale resilient and environment-friendly farming system. This strategy is grounded in a holistic framework to ensure that organic food becomes a normalised idea for the public. Through this framework, member states will design their agriculture strategies with guidance from the Common Agricultural Policy (CAP) and with financing help from the European Agricultural Guarantee Fund (EAGF) (European Commission). The Farm to Fork strategy is a strategic model that New Zealand could emulate in the future.

The most prominent areas that the EU will focus on include stimulation of the supply chain, food security, elimination of environmental risks created by chemical-intensive farming, and building healthier food supply and demand systems with a minimal economic impact on producers and consumers. Biodiversity conservation is one example of an important environmental benefit that will be achieved alongside a strengthened farming system.

At present New Zealand significantly lags behind the EU's initiatives toward building a sustainable organic supply chain. However, New Zealand can learn from the strategies set out by the EU, as well as from other countries that are trailing behind the EU in terms of previous government support for organic farming.

The European Union has set the Farm to Fork strategy as its first aspirational goal within the Green Deal. The strategy aims to achieve the following:

1. Accelerate Europe's transition towards a sustainable food system, especially the food supply chain
2. Make Europe a carbon-neutral or carbon-negative continent by 2050
3. Help Europe adapt to the impacts of climate change and mitigate previous damage
4. Reverse biodiversity loss across Europe
5. Ensure that everyone has access to safe, nutritious and sustainable food
6. Generate fairer economic returns, while ensuring affordability for consumers
7. Foster competitiveness and promote fair trade.

The above-mentioned aims will come with an accelerated EU transition to a sustainable food system. The EU also aims to transition 25% of their agriculture to organic and to reduce the use of chemical pesticides. A 50% reduction in the use of excess nitrogen and phosphorus by 2030 is also on the agenda.

The Farm to Fork strategy is devised to work by empowering National Action Plans. Member nations will create national policies that increase awareness of organic food. The EU will help members to overcome technical gaps in organic farming by sharing research and introducing innovation to member states. Increasing information on organic production, marketing and trade will be a part of the strategy. The EU plans to stimulate the organic market through organic food promotion policies, green public procurement, promotional activities to ensure consumer trust, and increased awareness of organic food through promotion of the EU organic logo.

At the same time, the EU plans to encourage farmers to switch to organic farming by offering support for converting and maintaining organic farming methods through CAP. New organic regulations also simplify production rules and phase out several exemptions. Meanwhile, robust precautionary checks must be cleared by countries within as well as outside of the EU, to ensure product quality. Small farmers will also be able to enter the initiative through allowance of group organic certifications. Research, innovation and other necessary education will also be disseminated to farmers to make sure that standards are met and issues such as contamination are minimal. The EU strategy recognises that strong attention to education and research is absolutely necessary, as knowledge is the primary limiting factor in organic production.

The European Union’s Biodiversity Strategy 2030 will also be aided by the positive environmental effects of organic farming. Other frameworks and strategies that will benefit from organic farming are the Green Infrastructure Communication and the Soil Thematic Strategy (European Commission). Other pieces of legislation will more easily meet their goals from the adoption of organic farming, including the Water Framework Directive and the National Emission Ceiling Directive. The organic policies of the EU will be integrated with other policy goals.

The EU’s Farm to Fork Strategy will work with both the producers and the consumers of organic products. Member states’ national policies will address issues such as overcoming complicated rules that hinder small farmers’ access to organic schemes, fraudulent behaviours that negatively impact the reputation of organic farming, nutrient pollution and recycling organic wastes. This holistic approach to organic farming is one of the frameworks that New Zealand should pay attention to.

Denmark

Denmark and Sweden have fairly advanced national policies for organics. Denmark’s national policy is known as “Working Together for More Organics”. Denmark sees its organic businesses in a highly positive light, and the political culture is far more pro-organic and progressive compared to the political culture of New Zealand. Denmark’s organic sector strategy can be said to be the guiding star of all national policies across Europe and North America. Denmark also played an important role in developing the EU's Farm to Fork strategy. The country had already set a goal of doubling organic production by 2020 from its base production in 2007. Denmark has set more ambitious organic goals than those included in the Farm to Fork strategy. For example, one of Denmark's goals is conversion of 30% of agricultural land to organic farmland by 2030, compared to the 25% set by the Farm to Fork strategy. Denmark also has national green procurement by the government. The country is aiming for 30% of food consumption to be organic, as well as 60% of the food in public canteens to be organic, by 2030 (Ministry of Food Agriculture and Fisheries of Denmark). Ironically from a New Zealand standpoint, Denmark is seeing the greatest organic growth in its Zealand province.

Denmark is known to be the world's leading country for organic agriculture. The country has focused heavily on increasing its organic exports, promoting the domestic organic market through public institutions, supporting farmers in the transition to organic farming and providing assistance to develop the organic business sector. Export growth has been accomplished through support for the export business sector, collaboration with embassies and involvement of the Ministry for Food, Agriculture & Fisheries in export promotions. Easing export pathways to bigger markets such as China has been an important focal point of the export growth policy as well.

At the same time, Denmark plans to grow its domestic organic demand by having the government promote organic sales domestically, pushing public kitchens and other public institutions to take up organic products and promoting organic food brands. The domestic organic business sector will also receive support to meet the increased local demand. The government plans to provide financial assistance, technical advice and services, promotion of local sales and increased education at primary and higher education levels. Universities in particular will be engaged in solving organic challenges. Other government policies to promote organic agriculture include lowering taxes on certified organic products, taxation of carbon emissions, introducing pesticide fees and increasing support for organic farming initiatives.

Established farmers will receive government financial support to transition to organic farming (Organic Land Subsidy Scheme, EUR 117/hectare/year) (Ministry of Food Agriculture and Fisheries of Denmark). The government will also monitor the existing organic sector to identify barriers to development.

The government has also planned to financially incentivise existing farmers to reduce the use of nitrogen, increase production of organic fruits and berries, reduce permit fees where alternative pesticide methods are being used and support nutrient circulation. Dairy and meat farmers will receive technological assistance to develop organic protein-rich fodder, which will also allow the country to further develop organic pig production.

The important points of Denmark's national organic strategy that should be considered by New Zealand are as follows:

1. The government authored the strategy and is leading the charge to meet its climate, sustainable food and environmental goals by assisting the growth of organic production systems.
2. Organics has ubiquitous political support. It is not politicised and seen to be owned or in a space belonging to one political party over the other.
3. The government incentivises farmers to use organic agriculture practices.
4. The government supports the domestic market by promoting domestic demand via educational and procurement policies.
5. The government supports farmers through a transition to organic farming by providing funding and advice.

Ireland

Ireland's organic strategy is notable for New Zealand to consider, as the position of the country's organic sector is most comparable to New Zealand. Ireland has two major strategies for its 2025 goals. Ireland's primary strategy is the Food Wise 2025 strategy, which aims to add value to Irish agricultural products. This strategy is complemented by the Organic Food Sector Strategy 2025.

Ireland has increased its organic agricultural land by 50% since 2014 with the help of the EU's Rural Development Programme, which includes the Organic Farming Scheme. This scheme provides financial aid to registered organic farmers, and €29 million out of its €56 million budget has already been issued to those registered (Department of Agriculture, Food and the Marine). Similarly, other investment aid programmes such as the Organic Capital Investment Scheme, utilised across all EU countries, have also provided financial aid of up to 60% for qualified young farmers to invest in infrastructure and equipment (Talmhaoichta and Mara).

Still, despite the influx of capital, Ireland has a relatively small number of organic farmers. An estimate puts the number at 1700 farmers (mostly organic meat farmers) and 400 organic processors, distributors and importers. The organic market size of Ireland is €200 million and there is a huge growth potential for organic farming, as the demand for organic products outweighs supply significantly. Irish consumers also show a significant preference for organic food over conventional food. The number of Irish consumers that have positive views about organic products over non-organic products is overwhelming (91%) (Talmhaoichta and Mara). Internationally, Ireland is known for its organically farmed salmon and is the biggest producer of organic salmon in Europe. Besides the lack of supply, the high purchasing cost of organic food are also one of the limitations to the growth of the organic market in Ireland.

Ireland's organic goals may differ from New Zealand's goals for organics; however, a SWOT analysis of the two countries reveals that both have similar opportunities and pitfalls. Ireland's strategy revolves around a consumer-led organic food sector that enhances the local food system's sustainability and produces a wide array of organic products to meet local and export needs. Ireland's strategy is sub-sector focused, grounded in performing a SWOT analysis of each sub-sector and then producing action plans that specify the responsible authorities, time frames and milestones to be achieved.

Ireland has recommended the following actions for each sub-sector:

1. Creating a sectoral profile, including value chain analysis
2. Increasing education, training and research in the area of organics
3. Creating a long-term market creation plan with specific targeted goals
4. Introducing regulations to protect the reputation of the sector and the stakeholders
5. Making a strategy to increase awareness of organics
6. Introducing public procurement for industries and consumers
7. Introducing organic farming schemes to support the long-term organic farming industry, and increasing the effectiveness and efficiency of the organic farming industry post-2020.

The Ireland Organic Strategy 2019-2025 seems to be one of the most relevant examples for New Zealand. Ireland's local supply of organic food is still insufficient. Therefore, Ireland is focusing on developing the production of aquaculture as well as organic dairy, meat and poultry to meet domestic demand. The strategy suggests reviewing organic production and payments to farmers through the Rural Development Program every five years to make sure that funding is high-efficiency and that maximum productivity is achieved. The following issues are the main barriers for the plan to overcome: slow market development, insufficient training and education, insufficient consumer awareness and lack of green public procurement.

United Kingdom and the United States

United Kingdom

The United Kingdom, post-Brexit, currently lacks a national organic strategy. However, the Soil Association, the peak sector body for organic in the UK, has established clear priorities and advice for the UK government to consider. The Soil Association has advised on the use of agricultural land for sustainable farming and have developed several strategy documents to support key initiatives. (Soil Association)

1. Form a holistic national organic policy that is integrated into other national agriculture, environment, and land management policies
2. Identify and promote organics as a public good and procure public funding
3. Address ‘macro-economic’ and policy issues that discourage uptake of organic land management to satisfy the available market opportunities
4. Promote and facilitate R&D for organics
5. Position the UK in line with the EU’s organics initiatives in order to compete in the marketplace, while also addressing environmental issues and climate change
6. Impose fines on agricultural polluters to reverse the lack of economic support for organic farming.

In addition to the Soil Association, the UK government has commissioned a National Food Strategy which is also developing strategies to deal with climate change. Part one of the strategy was published in July 2020 with part two to be published in July 2021. Chapter 6, entitled A New Green Revolution, looks at the impact that climate change will have on the UK’s ability to feed itself, while also accepting that agriculture is a major contributor to this crisis. Part one suggests that the UK must pivot quickly to more environmentally friendly production systems that blend old and new ways of farming. For instance, combining organic farming with modern technologies to develop best practices for capturing carbon, increasing biodiversity and building a healthier world. (Dimbleby)

United States of America

The private sector in the United States is playing an important role in leading the market for organic agriculture and products. The Organic Trade Association (OTA) is the most prominent of the private organisations that are working to enhance the capacity and capability of the organic business community. OTA is a membership-based organisation that is spearheading the organic trade of 9,500 organic businesses in the United States across 50 states (Organic Trade Association). The US government itself does not have a national organic strategy, however, organisations like the OTA lobby the government on behalf of its members and the organic sector and present key initiatives to government.

According to the OTA, current priorities to advance organic agriculture and the sector includes:

1. Advancing organic agriculture at the US Department of Agriculture to establish a national program to incentivise transition to organic that focuses on reducing financial risks, improves

market and infrastructure development, increases access to land, and provides technical assistance

2. Ensure that organic has a seat at the table in climate discussions so that any policy that addresses the role of climate change in food and agriculture should advance the opportunity for organic to be a climate change solution. (Organic Trade Association)

3. Develop policies and programs that help ALL farmers improve soil health, protect farmland, invest in on-farm renewable energy and increase research.

The OTA is also trying to persuade the Biden administration to incorporate more organic products in public procurement. By focusing on organic procurement for public institutions such as homeless shelters, schools, food banks, hospitals, and government canteens, the government helps build demand for domestic organic production.

Like New Zealand, the US also faces the same problems in the organic sector, namely, lack of government buy-in, and competition between multinational conglomerates and the domestic organic community that supply local markets.

To help with these problems the OTA plans to increase market and infrastructure development by ensuring that organics becomes a relevant topic during environmental policy discussions. The approach to this goal is planned through strengthening the connections between consumers and the organic farming sector, marketing locally and internationally, and implementing clear animal welfare standards to allow organic farmers to compete with the big poultry and meat industries.

Australia

Compared to New Zealand, pathways to scalable organic production has older roots in Australia. However, similar to New Zealand, Australia does not have a national organic strategy or national organic standard. Similarly, Australia has a sector body – Australian Organic – which is similar to a combination of Organics Aotearoa New Zealand (industry), the Organic Exporters Association of New Zealand (international trade) and the Soil and Health Association of New Zealand (consumers).

The current priority of Australia is to develop a legislative framework for organics (Australian Organic). The Department of Agriculture, Water and the Environment (DAWE) has set up an advisory group that will help in the creation of a nationwide regulatory framework for the production and sales of organic products (*Organic and Biodynamic Produce - Organic Industry Advisory Group*).

While there is no national organic strategy per se, government-backed R&D strategies have been in place since the late 1990s. Throughout the years, these strategies have contributed to the country becoming the world's largest area of certified organic land – around 51% of the global total, and the world leader in organic beef production.

By focusing on the sector though R&D strategies, Australia has been able to deliver continuous improvement and productivity for the organic sector. The strategies allowed for an increased rate of adoption of current organic systems knowledge, improved the interactions between organic and conventional agricultural R&D, and facilitated broader co-investment in organic industry research.

The R&D plans of Australia have identified knowledge, investment, and delivery optimisation as the three pillars of success for the promotion and development of organics (*Organic Industry Research and Development Plan*)

These three pillars are:

1. Knowledge – What knowledge is required to achieve the desired industry outcomes? Where is that knowledge available? What research needs to be undertaken to address gaps in the current knowledge base?

2. Investment - What resources are required to deliver the plan? Who are the potential investors in the program? What processes and structures are required to secure their investment?

3. Delivery - What processes and structures need to be put in place to deliver the plan? How does new and existing knowledge get translated into industry outcomes?

Two key programs that have been created under previous strategies that are very relatable to New Zealand include:

1. The Australian Organic Hub; a digital platform to source and scale knowledge for the producers to help overcome knowledge gaps.
2. The Organic Industry Research Program; the program identifies priority sectors and sources research based on performance indicators.

Conclusion

Countries around the world recognise the positive benefits of organic farming on the environment, human health, rural development, and climate change. Organic production systems are recognised as contributors to the objectives of a variety of national policies covering these issues.

While organics is seen as one solution to some of society's most pressing problems, the economic growth of the organic sector is fuelled by changing consumer preferences for products that meet their health and ethical demands.

The organic sector strategies and Organic Action Plans in this report were reviewed to help inform New Zealand's organic sector leaders about what several of New Zealand's largest trading partners are considering, implementing and working towards. They provide a glimpse into the changing world in which New Zealand's organic sector operates and must navigate as all countries move quickly to respond to and mitigate climate change.

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