Country presentations

COLOMBIA - General situation of organic agriculture in Colombia –organic food market in Colombia

Maria Cecilia Medina Gutierrez

The development of OF in Colombia began by the end of the 1980s. It.was favored by the work of organizations with social consciousness and sensibility, which enhanced information flows, rural education, and internal organization for marketing, management and in some cases relation to international development support agencies. NGOs and some religious organizations working with rural communities applied the method called „Diálogo de saberes" (knowledge in exchange) learning a lot about traditional knowledge of the communities. This method is a permanent exchange about the local resources and values. The process strengthens the sense of community membership, self confidence and let people recognize the value of their own culture and the role they play as guardians and protectors of their own food and independence. Meetings to encourage the use of traditional food and seed exchange are part of it. Many manuals on organic agriculture in the tropics have been written as result of this work, mostly generated through field work.

External cooperation agencies are financing the presence of peasant and indigenous organizations in international fairs like ANUGA or BIOFACH in Germany, or financing experts to support the connection with international markets, or the arrangements to get agroindustrial machines.

Today, the REDAE (national network for ecological agriculture) unites the people working or supporting OF in Colombia. Another network „RDS" (red de desarrollo sostenible de Colombia - Net for sustainable development) is also connected to REDAE.

There is inequality of land tenure in Colombia. In the year 1988 a million peasant units, 62,4% of all agricultural properties held only 5.2% of the area farmed; the mean size of the parcels was 1,2 ha. This small farms are often on eroded, sloping and not very fertile land. Some forced displacement caused by social and armed conflict cause the abandonment of the production units and migrations. Because of internal political decisions on food imports and the fall of coffee prices, a lot of peasants were ruined or lost their jobs. For them it was not easy to switch to alternative cultures being coffee a perennial crop, so they must survive collecting or cultivating coca leaf and poppies, which is better paid or joining guerilla gruops or the army. Nevertheless some organizations working on organic agriculture, survived that crisis because of the better prices of their products in international markets. This makes of OF an alternative if the producers achieve a short market chain. This is the case of ASPROME, an umbrella organization for other eleven peasant, indigenous, women and afrolatinoamericans organizations. They export organic fruits, dried foods, jams, coffee.

The first resolution on OF appeared with the number 0544 from December 21/1995. As the possibility to export organic products with better prices was recognized by the government some political regulations were issued and the resolution from 1995 was replaced by the resolution 0074 from 2002. New resolutions related to organic production, transformation and commercialization were created. Examples are the resolution 00150 from year 2003 concerning soil conditioners and fertilizers, the resolution 00375 from year 2003 for vegetable extracts and biological components, the resolution 00148 from year 2004 creating the national ecological seal and giving the right to use and manage it to certification agencies.

Part of the government programs on OF is PRONATTA, a national program for technology transfer that also supports OF research projects. The „Plan nacional de Mercados Verdes" is a program of the ministry of the environment for the creation of „green markets". It tries to extend the market of organic products connecting the producers with supermarket chains, restaurants chains and organizing meeting points to promote organic products. Institutions working on organic topics and sustainability are supported by the government. This is the case of the Instituto Alexander von Humboldt, dedicated to research on biodiversity topics to create new business opportunities.

As a contradiction, the government supports political decisions that threaten the organic agriculture inside the country. One example is the permission to fumigate illegal cultures, serving the interest of US companies which produce the herbicide, the military equipment for their use and earns money doing the fumigation. The herbicides affect natural ecosystems and contaminate water and food from communities. The control of food prices and the imports of cheaper food, sometimes from lands producing food with transgenic plants, are affecting the Colombian food producers. The permission to introduce transgenic seeds in the year 2002 was fortunately stopped and raised a big protest in the Colombian society in year 2003.

Certification

The first farms inspected by IFOAM accredited inspectors in the year 1988 in Cauca were producing panela (raw sugar cane blocks) for export, in the Caribic Coast, coffee, bananas and palm oil (1990-1991). In 1992 the first Colombian association of organic coffee growers was created in Cauca (ACOC) with the support of the NGO Instituto Mayor Campesino. There were a lot of initiatives producing not certified organic products since that time. Today, because of the marketing reasons, there are some national certification agencies like Biolatina, Biotrópico, SGS Colombia (Société Générale de Surveillance), CCI (Corporación Colombia Intenacional), Bureau Verites QI de Colombia, Cidet ,and international certification agencies like NATURLAND, ECOCERT, OCIA-Organic Crop Improvement Association, BCS Öko-Garantie International operating in Colombia. Japanese, American and EU certifications are needed to be accepted in these markets. A study was conducted to create support for organic certification; the so called ECOS project (Estímulo a la certificación orgánica sostenible).

The majority of organic producers are being burdened with the additional cost of the certification. This makes the internal prizes of organic products high, difficulting the development of organic agriculture, since people cannot afford to pay for the organic food in the domestic markets. Because the certification process was developed without enough participation of the Colombian organic producers and NGOs, some of them refuse so undergo certification. These producers do not want their products to be more expensive because of it. They say the institutions in charge of the certification have no real organic philosophy or knowledge of the national organic producing systems. A lost of organic values happens if products are only affordable for high income society groups. This is how an alternative movement developed; trying to continue working with confidence markets, which already existed before the regulations were issued. They work with the word of the producers, and the internal control system of the communities, they have the farmers´ own seals, and are associating in groups to sell in organic community shops or peasant markets. This kind of movements ia supported by the Latin-American and Caribic Agroecology Movement, MAELA- (Moviemiento Agroecológico Latinoamericano).

Export market

The export quantities have increased in the last years from 4 million US dollar in 1998 to 19 million US Dollar in the year 2002. Today, Colombia has 37000 ha certified as organic. The exporters are private and associate Colombian producers. One producing company already has representation agencies in North America, Australia, New Zealand, Germany and Japan. Other producers are associated to deliver enough market quantities and to pay the certification. They go to the international fairs like Biofach Japan, Germany, Brazil. The products in this segment are the same products in which Colombia has experience from the conventional markets, some organic products being exported now are: coffee, green coffee, frozen dried coffee, palm oil, spreads, margarine, kernel oils, non dairy coffee creamers, molasses, sugar syrup, seje oil (Oenocarpus bataurea), coconut oil, cocoa, chocolate liquor, cocoa butter, cocoa powder, organic fruits (mango, bananas, raspberries), jams, dried fruits, concentrated fruits, flowers and ornamental plants. Other products with export possibilities have not yet achieved the quantities to be offered continuously. Examples are: spices, potatoes, green pods, peppers, tomatoes, garlic, cucumbers, asparragus, artichokes, melons, water melons, citrus fruits (lemon, oranges), grapes, strawberries, raspberries, avocados, pinapples, maracuyas, papayas, pitayas and other exotic fruits.

Buyers of Colombian products are USA, France, Great Britain, the Netherlands, Germany, Japan and Belgium.

Internal market

In the domestic market the prices of organic products are sometimes more than twice the price of non organic products. Some brand names have bean created to sell organic products. Products mainly for the domestic market are: buffalo milk, meat and cheese, cow milk, eggs. There are certified organic vegetable producers associations offering 25 different products. They sell in supermarkets, which already have special organic points. Associations of organic producers without certification sell in organic shops. These are still few and operate mainly in the big cities. New marketing initiatives work with the internet, home delivery services, distribution in schools and within friendly programs of consume for example in restaurants of big companies or institutions. Alternative exchange models like trade by bartering, also supported by some NGOs, include organic agriculture products. One example is the project „Trueque y Truequeando por Antioquia‟ (Bartering across Antioquia) from the Institute for Antioquia Development and the „Corporación Comunicar‟ in Bogotá.

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HUNGARY - Situation of ecological agriculture in Hungary

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Hungary is located in Central-Eastern Europe, in the Carpatian basin. Its climate is temperate with less precipitation, the average rainfall is 594 mm and the annual average temperature is 9.7º C.

Hungary has a great potential of plant production. The majority (about 70%) of the total area is used as agricultural field. The amount of arable lands is 4.5 million hectares. Although there are lots of pastures and meadows, animal husbandry is less important in the country.

Agriculture has old traditions in Hungary, mainly in the southern and eastern part of the country. The importance of the agricultural sector is decreasing, nowadays the 7-8% of the population works full time in agriculture and for another 4% it means supplementary income.

Organic agriculture was started in the beginning of ‘80s by forming a group from enthusiastic amateurs and farmers. This club was called Biokultúra, later it formed into *Biokultúra Association*, the most wide-spreaded, best known organic organization in Hungary. Nowadays there are more non-governmental organizations connected to organic movement such as

- Hungarian Federation of Organic Farming Associations
- Péter Sárközy Foundation
- Association of Hungarian Organic Farmers

Only two certification bodies operate in Hungary:

- Biokontroll Hungária Kht. – registration number HU-ÖKO-01
- Hungária Ökogarancia Kft. – registration number HU-ÖKO-02

According to the latest data there are about 133000 hectares of certified organic field and 1583 certified producers/farmers in Hungary. Figure 13 illustrates the continuous growth of organic area.

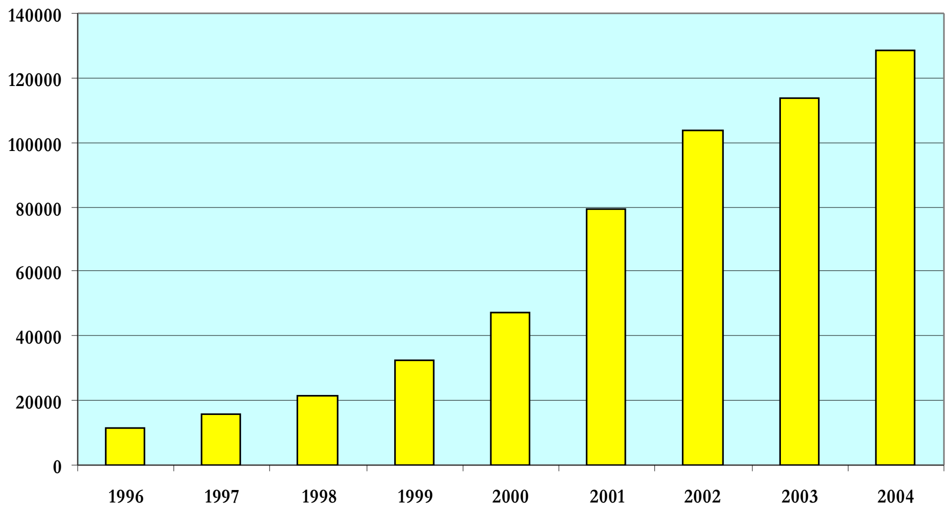


Figure 13 Growth of organic area in Hungarz

Utilization of Hungarian organic lands can be seen on Figure 14. About 50% of the total area is used as arable land, pastures and meadows represent the second biggest amount.

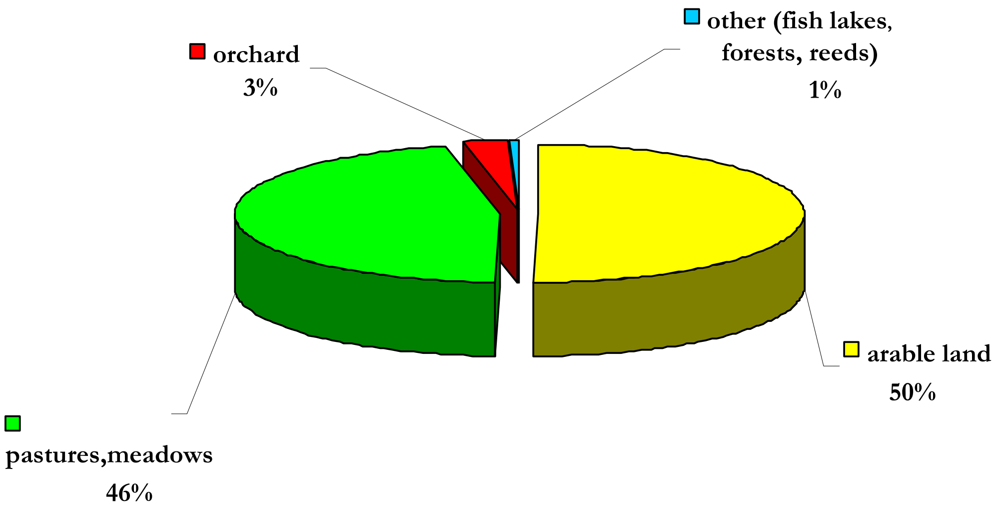


Figure 14 Utilization of organic lands in 2004

This figure demonstrates the ratio of crops grown on organic fields. The high ratio of pastures and meadows derives from the land utilization. The most common crops in production are cereals (with winter wheat on the first place), they mean almost one quarter of all organic plant production. Fresh vegetables and fruits are about 2.2-2.5%.

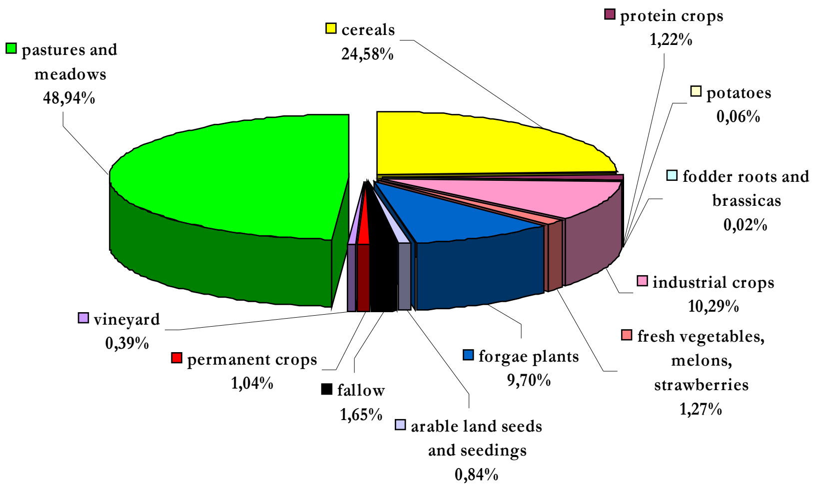


Figure 15 The distribution of organic land areas according to the crops grown in 2004

Organic animal production

160 farms deal with animal production altogether with 12 254 animal units (500 kg). The distribution of livestock is shown in table 5. The most important animal is the cattle, especially the famous Hungarian Grey Cattle, which is absolutely suitable for organic purposes.

Animal species	Animal units
Poultry	147,2
Buffalo	327,4
Sheep	2121,8
Goat	252,8
Horse	247,3
Pig	703,5
Mule	1,4
Cattle	8419,4
Donkey	32,8
Total	12253,6

Table 5 Number of animal units according to animal species

Bee-keeping

Bee-keeping and honey production are quite important in Hungary, particularly in organic way. There are 169 inspected beekeepers. The most important data of bee-keeping are shown by table 6.

No. of bee-keepers	No. of in conversion' bee families	No. of fully converted bee families	Total no. of families
169	910	13 374	14 284

Table 6 Number of inspected bee-keepers, bee families in 2003

Thank of the annual report of Biokontroll Kht. (they control the 95-96% of the certified areas) the data are considerably accurate.

Organic market of Hungary

About 5% of organic products are sold on the domestic market, mainly fresh vegetables and fruits, cheese and diary products and processed meat products. Organic bakery products, fresh meat, ready-to-eat food are rarer. The demand is increasing but not so many people can afford it. The domestic organic prices are very high compared to the salaries. The prices – depending on the type of crop – are higher by 40-200% than conventional prices.

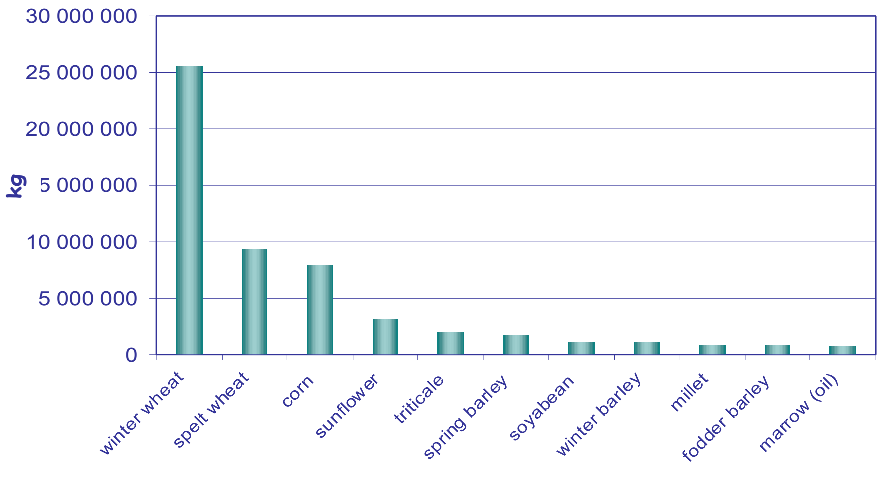


Figure 16 Main exported products

Nowadays, in almost every big town have an organic market or a corner on the traditional town market. In Budapest there are three quite well-known and big organic markets, where consumers can purchase fresh organic food. Most of the super-, hipermarkets sell some kinds of organic food, mainly bakery and diary products, flours, eggs, but very rarely fruits and vegetables. There are many healthy shops where organic products can be bought.

The remaining 95% is exported. The main exported products are cereals, fodders, then beef, eggs, honey herbs. The majority of the products are exported to Germany, Austria, and Switzerland. Unfortunately, Hungary exports mainly raw materials, fresh products and imports processed products which activity should be changed in the near future for more income.

ITALY - organic food market

Angelantonio D'Amario, Fabio Marzoli, Francesco Martino, Michele Morettini

The organic market in Italy has continuously growning during the past years. The economic value of the Italian organic market is estimated to be around 1.45 billion Euro. It is therefore no surprise that the big national companies and the Italian subsidiaries of multinational corporations have shown great interest in organic agriculture. In the second half of the 90's the supermarkets have entered to this niche sector, most of them with their own private label. Many fairs and markets are now devoted to organic agriculture. The largest fair is held in Bologna in September (SANA).

Supply of organic foods

From data provided by Italian inspection bodies emerge that, up to 31 December 2003, the operators of the organic sector were 48,473 of whom 42,185 farmers, 1,849 farmers/processors, 4,264 processors and 175 importers. About the diffusion on the Italian regions: Sicily, Sardinia, Emilia Romagna, Apulia, and Calabria are the most important regions (See table 7).

Mostly in south Italy are localized organic farms while in the north the processors and importers. The surface cultivated with organic systems is about 1,052,002 hectares of which 70% are forages, meadows, grazes and cereals; the remaining part are constituted by olive trees, grapevine, citruses, fruits and industrial plants (See tables 8, 9, 10).

Over a third of all Italian organic production is exported, mainly to other European countries, but also to the USA and Japan. Among exported Italian organic products are:

- Fruit and vegetables (top-quality, owing to the favourable climatic conditions and the professional skill of the producers)

- Extra virgin olive oil (olive trees have been grown in Italy since ancient times, and Italian olives offer a great variety of scents and flavours, ranging from the most delicate aroma to an intense, fruity bouquet)
- Wine (with excellent award-winning products highly praised in the most important international wine events).
- Cheeses (ranging from the celebrated Parmigiano Reggiano to the rarest traditional specialities).
- Pasta (whole-wheat, white, either plain or with herbs or spices)

REGIONS	EXLUSIVE FARMERS	EXLUSIVE PROCESSORS	EXLUSIVE IMPORTERS	FARMERS PROCESSORS	FARMERS IMPORTERS	PROCESSORS IMPORTERS	FARMERS IMPORTERS PROCESSORS	TOTAL
ABRUZZO	945	113	1	63	0	1	0	1.123
BASILICATA	1.601	48	0	29	0	0	0	1.678
CALABRIA	4.118	162	0	102	0	0	0	4.382
CAMPANIA	1.446	188	0	91	0	5	0	1.730
EMILIA R.	3.900	623	1	156	0	38	1	4.719
FRIULI V.G.	276	66	1	29	0	5	0	377
LAZIO	2.368	247	1	158	0	2	0	2.776
LIGURIA	359	69	0	32	0	11	0	471
LOMBARDIA	1.004	397	2	95	0	30	0	1.528
MARCHE	1.622	128	0	59	0	4	0	1.813
MOLISE	370	39	0	13	0	0	0	422
PIEMONTE	2.588	321	0	100	0	15	0	3.024
Pr. Aut. TN e BZ	624	118	3	31	0	1	0	777
PUGLIA	4.095	352	1	172	0	1	0	4.621
SARDEGNA	4.602	96	0	64	0	0	0	4.762
SICILIA	7.852	403	0	151	0	3	1	8.410
TOSCANA	2.035	383	1	305	0	11	1	2.736
UMBRIA	1.169	92	0	83	0	4	2	1.350
V. Aosta	63	3	0	3	0	0	0	69
VENETO	1.148	416	1	113	0	27	0	1.705
TOTAL	42.185	4.264	12	1.849	0	158	5	48.473

Table 7 Operators of the organic sector.

ORGANIC PRODUCTS	HECTARES		
	IN CONVERSION	ORGANIC	TOTAL
TOTAL CEREALS	**56.195**	**153.181**	**209.376**
COMMON WHEAT	6.267	16.360	22.627
DURUM WHEAT	26.749	62.772	89.521
RYE	56	292	348
BARLEY	4.531	12.679	17.211
OAT	3.805	9.437	13.242
CORN MAIZE	4.373	10.381	14.754
RICE	1.247	4.952	6.199
OTHER	9.167	36.307	45.474

Table 8 Cereal details.

ORGANIC PRODUCTS	HECTARES		
	IN CONVERSION	ORGANIC	Total
CEREALS	56.195	153.181	209.376
LEGUMINOUS	4.317	7.345	11.662
POTATOES	158	730	888
SUGAR BEET	102	3.887	3.990
FORAGE BEET	102	215	317
INDUSTRIALI CROPS	7.696	24.617	32.313
VEGETABLES	2.585	8.769	11.354
FLOWERS AND GARDEN PLANTS	26	75	102
FORAGES	74.738	222.259	296.997
OTHERS ARABLE CROPS	3.319	5.838	9.157
FRUITS	15.766	36.448	52.214
CITRUSES	5.834	10.915	16.749
OLIVE TREES	24.792	61.410	86.201
GRAPEVINE	11.439	20.271	31.709
MEADOWS AND PASTURES	83.837	179.165	263.003
OTHER	9.236	16.734	25.970
TOTAL	**300.141**	**751.860**	**1.052.002**

Table 9 Total surfaces of organic farms.

ORGANIC PRODUCTS	HECTARES		
	IN CONVERSION	ORGANIC	TOTAL
INDUSTRIAL CROPS TOTAL	**7.696**	**24.617**	**32.313**
RAPESEED AND TURNIP	84	73	157
SUNFLOWER	1.913	6.040	7.953
SOYA	1.393	4.318	5.711
TOBACCO	2	68	71
MEDICINAL AND AROMATIC PLANTS	364	3.416	3.779
OTHER	3.940	10.703	14.642

Table 10 Industrial crops details.

The animal production is: 189,806 bovines cattle (milk and meat), 537,397 goats, 20,513 pigs, and 1,287,131 chickens etc (See table 11).

Today consortia and trading companies increasingly plan production and crops together with single farms. To steer the growth of the organic segment safely, efficiently and with appropriate instruments considerable investments are necessary. This will ensure an increasingly larger choice of products on offer, a better service, guaranteed product quality, and the continuous monitoring of the evolution of consumer demands. This, in turn, will mean an improved planning of product availability for trading operators and for the consumers as well as lower prices and higher quality standards.

ANIMALS CATEGORY	ANIMALS NUMBER
BOVINE	189.806
OVINE	436.186
GOATS	101.211
PIGS	20.513
POULTRY	1.287.131
RABBIT	1.068
BEES HIVE	76.607

Table 11 Organic animal production.

Demand of organic foods

The value of Italian purchase of organic products is about 301 millions euro. The categories of products that Italians prefer consume are: milk and dairy products (26%), fruits and vegetables (16%), dietary supplements and dietetic food (10%), beverages (9%), biscuits and cookies (8%) and childhood products (6%).

These choices shows that Italians prefer to buy organic products when they want to be sure of their safeness.

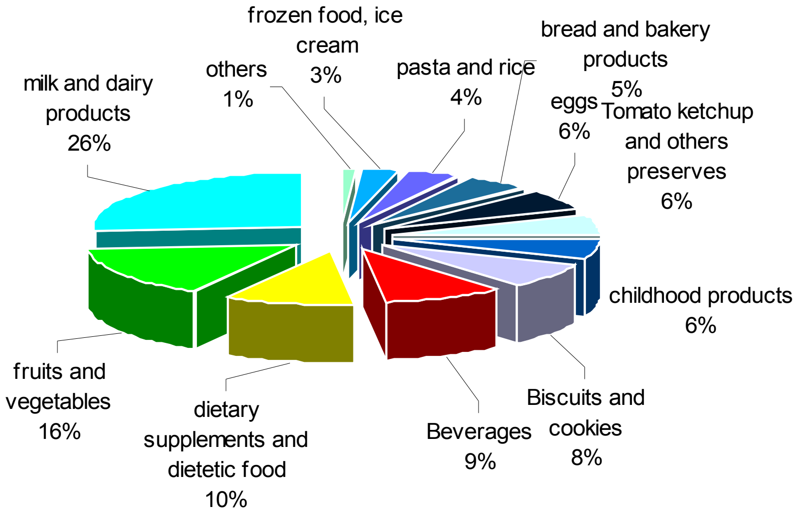
Independently from the categories the following products are the best sold in the organic sector: yogurt, fresh vegetables, eggs, fruits beverages, baby food, fresh milk and dietary cookies.

All the above mentioned products are the 45,34% of the total amount value of the Italian organic purchase. Moreover many consumers that began to buy these products continue to buy them regularly.

The best increase for the organic purchases has been during the year 2001. Food scares about mad cow disease led to an acceleration of the growth: in the first three months of 2001, the greatest wholesalers reported a growth in sales volume from 40 to 65% in respect of the same months of 2000.

After this "emotional" growth the purchases have lightly decreased: in 2002 Italians bought 1.6% less product (in volume) in comparison to 2001.

The products that have recorded the higher decrease are: baby foods (-16% in volume; -11,9% in value), milk and dairy products (-3% in volume; +33,5% in value), fruits and vegetables (-3% in volume; +28,2% in value), beverages (-2% in volume; +40% in value), pasta and rice (-1% in volume, +23,2% in value). An opposite trend has been that of meat and derived products (+9% in volume; +13,6% in value) and that of eggs (+29% in volume; +27,6% in value).



The consumers

Overcame the initial approach of Italians to the organic products now is possible to delineate the organic consumer. The largest concentration of consumers buying organic products is in the northern regions of Italy, where the industrial and economic structure is stronger. Most of the organic products are however produced in the southern, more agriculturally oriented, and warmer part of the country.

The average consumer of organic products is between 30 and 60 years old, lives in a city or large town in the north of the country, has an average or higher than average education, and is in the upper middle or upper income bracket.

They are partially conscious to pay a premium price, which is justified by health related justifications. A survey has shown that 73% of Italians give a right definition of organics and know some key characteristics (no chemicals, more naturalness), 22 % give not wrong but vague definitions ("healthy, genuine, safer"). Moreover 77% of the Italian adults think organic food is healthier, 64% that organic food is different from conventional, 63% think organics taste better, 75% think that organic production is safer for the environment (and 80% think organic products are expensive). To eat high quality, better-tasting and ecologically sound food, 68% of Italians are surely (26%) or maybe (42%) willing to pay a higher price.

Indeed, one of the major obstacles to increase in demand of organic products in Italy is the consumer lack of information and confusion. In the above mentioned survey only few respondents are classified as "highly informed" while most consumers have a very low level of information, and confuse organic products with "natural", "low-input" or even "wholemeal" and "macrobiotic" products. Among these, someone believe that organic products are only produced in Italy and almost all the remaining part simply does not know if imported products could be labelled as "organic".

Prices and Economic Aspects

Premium prices for organic products are still relevant, especially at the retail level for processed imported goods. Imports are quite important for processed goods except for pasta and noodles (of which Italy is a net exporter) and fruit and vegetables. Imported milk has recently had a sharp increase. The prices paid for organic cereals are 30 to 40 per cent higher than for conventional crops. Prices for organic fruit and vegetables, though, vary according to the season and are at times comparable to the conventional ones.

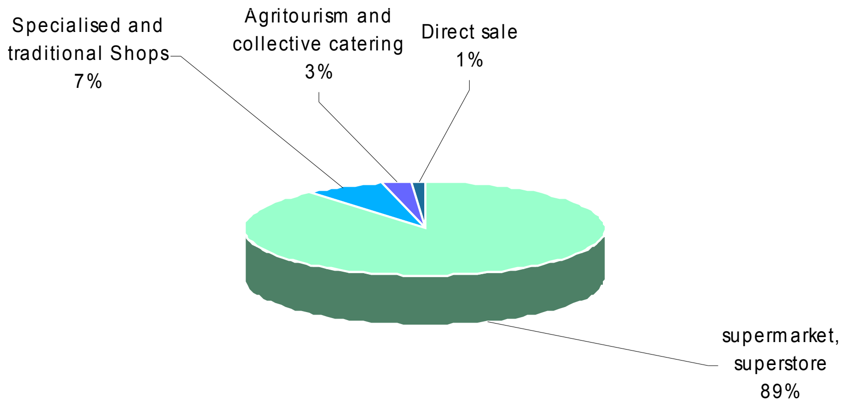
	Supermarket, non-organic	Shops, organic	Organic farmers market	Supermarket, organic
Olive oil	9'980	16'175	20'000	11'320
Potatoes	1'980	3'200	2'800	2'791
Tomatoes	2'980	3'500	5'500	4'482
Onions	1'680	3'950	3'800	3'411
Cucumber	3'980	5'450	3'500	2'907
Carrots	2'480	3'650	3'000	3'561
Apples	3'680	4'400	3'500	5'300
Oranges	2'233	3'000	2'800	3'071
White wine	6'600	7'453	4'000	7'987
Yogurt	7'180	8'250	n.a.	8'660
Eggs	442	650	500	712
Baby food	13'093	13'500	n.a.	16'250

Table 12 Comparison of prices (June 2001, units 1kg/l or 1 egg)

Because of the small-scale processing plants and inefficiencies in distribution channels, processed food often has very large premium prices.
A three-year long economic analysis of organic and conventional arable farms has shown that, due to premium prices, organic farms are as profitable as comparable conventional farms. In addition, it has been shown that organic farming is not always more labour intensive.

Marketing Channels

In the year 2002 about 94% of the total volume (89% in value) of organic food sold in Italy was bought on supermarkets. The others marketing channels are: traditional and specialized shops (3% in volume and 7% in value), agritourism and collettive catering (2.4% in volume and 3% in value) and direct sale (about 1%).



Supermarkets

The increase of availability of organic products on supermarkets has been one of the reasons of the growing of the organic market. Mostly they have launched their own line of organic products with advertising, TV commercial, sampling corner in some hundreds of supermarkets, press conferences etc. The whole organic market has take advantage of this marketing operation.

On the other hand supermarkets can not be the only distribution channel for organic products. Many consumers still prefer traditional shops or the direct sale from the farmer because of the perception of natural and genuine systems of production. Moreover not all organic farms are able to face with supermarket; thus others distribution channels will continue to play an important role on the organic market

Specialised Shops

There are about 1000 shops in Italy that specialise in organic food, two thirds of which are located in the north of the country. They are mostly independent shops, smaller than 100 square metres. There are also, of course, larger outlets (between 200 and 500 square metres) and about fifty franchise shops of regional or nation-wide chains. The most important franchisor is Naturasì, with about 30 franchisee superettes (some are butchers, called "Carnesì").

Organic Catering

There are currently about a hundred organic restaurants, most of which are located in the northern and central regions and in the larger towns. For the greater part, they are vegetarian or macrobiotic restaurants.

A very interesting and rapidly growing phenomenon is that of organic school cafeterias. Originating from a 1980s pilot project in the Cesena area, they now serve more than 600,000 children from nursery to middle schools in metropolitan areas (Rome, Bologna, Turin, Padua) as well as in smaller towns. Since 1999 there have been laws compellling municipalities and hospitals to use daily some organic, typical and traditional food in their catering services. The region Friuli Venezia Giulia supports municipalities, which adopt organic catering with a considerable grant (30% of the total cost). Also Tuscany and the Marche give contributions to Municipalities so that prices can be lowered.

41 towns in the Milan district have organic school meals, 34 in the Trento district, 32 in the Udine district. But the real leader is Modena province: 22 out of its 47 towns are serving organic foods at school.

The regional law no. 29/2002 of Emilia Romagna (strongly promoted by the Green regional deputy Daniela Guerra) imposes a 100% organic diet for nursery and primary schools (from 3 months to 10 years), and at least 35% in advanced schools, universities and hospitals. Other products have to be traditional, typical or coming from certified IPM. As current contracts will expire, school meals will be put out to the new contract, and gradually, before 2005, in every school of the region all 350,000 children (and 35,000 teachers and attendants) will eat organic.

Further Reading

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La spesa domestica per i prodotti biologici confezionati nel 2002 (ISMEA) http://www.sinab.it/sezioni/sit/%20allegati_sit/38/ismea_consumi.pdf

Mipaf: L'AGRICOLTURA BIOLOGICA IN CIFRE AL 31/12/03 www.politicheagricole.it/ PRODUZIONE/AGRIBIO/Italia%202003.pdf

SLOVAKIA – Ecological agriculture

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Figure 17 Logo of organic products in Slovak Republic

Development of organic agriculture in Slovakia

Development of this type of agricultural production in Slovakia started in the year 1991 in connection with experience and development trends in West European countries. In this period, the basic regulatory framework for the system of ecological economy became "Rules of organic agriculture valid for the territory of the Slovak Republic", which were based on principles and requirements of ecological agriculture defined by the IFOAM. 31 farms have entered the system, mostly agricultural cooperatives with a total area of 14 773 ha of agricultural land. After the conclusion of the conversion, 31 entities were allowed to label organic production from the 1994 harvest as "bio".

Conception of organic agriculture

In the year 1995, a "Conception of Organic Agriculture in Slovakia" was worked out and approved by the government of the Slovak Republic. This fundamental document determined the basic direction of ecological agriculture in the Slovak Republic in a horizon until the year 2010, and has adopted a set of measures for its realisation.

A basic change in the legal performance of ecological agriculture occurred in the year 1998 when was passed Act of the National Council of the Slovak Republic No. 224/1998 Coll. on Ecological Agriculture and the Production of Bio-Foodstuffs.

Present state of organic agriculture in the slovak republic

The area of ecologically cultivated land is approximately 65 388 ha at present, of that 16 110 ha of arable land, 48 911 ha of permanent grass cover, 234 ha of orchards and 133 ha of vineyards. 131 organic entities are registered, of which 65 organic producers of bio-products, 59 entities are in conversion, and there are 16 organic producers of bio-foodstuffs.

With respect to the geographical distribution of farms, their highest density is in mountain and sub-montane areas, mainly in the districts of Čadca, Kysucké Nové Mesto, Svidník, Bardejov, Stropkov, and Humenné, while the network of organic enterprises is lower in lowlands. Cereals are grown the most (wheat, spelt, rye), however, also peas, sunflowers and fodders, the cultivation of medicinal and aromatic plants, as well as of vegetables, mainly of asparagus, is successful, with the production of bio-grapes and bio-fruits developing. A substantial part of the plant production is being exported to countries of Western Europe. In animal production, there prevails sheep and goat breeding, along with the production of traditional cheese products and the breeding of cattle, mainly without market production of milk.

After admission to the EU, organic agriculture is being carried out in compliance with EC Regulation No. 2092/1991, and subsidy support is arranged within a Rural Development Plan measure – Agri-environment and Living Conditions of Animals. In compliance with EC policies, the Action Plan for Organic Agriculture in Slovakia has become the new strategic document for organic agriculture.

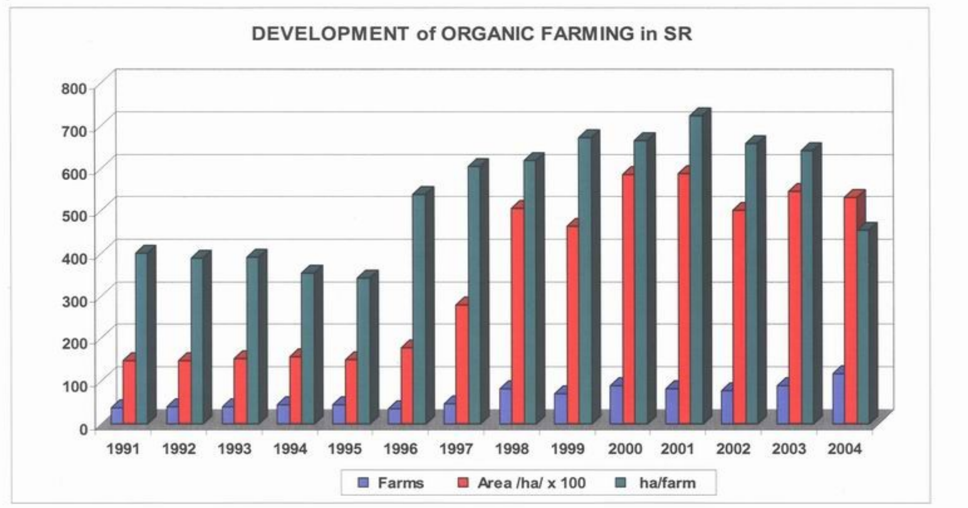

Figure 18 Development of orgnic farming in Slovak Republic

References

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FINLAND - Organic markets in Finland

Hanna Tuomisto

At the moment there are 4 939 organic farms in Finland, which is 6,9 % of all farms in Finland. Organic land area is 168 521 hectares, which is 7,6 % of all fields in Finland.

The share of organic markets is about 1 % of total sales (in value) in Finland. Variation between different product groups is 0,5-4,0 % (flakes 6,2 %, flours 4,3 %, pasta 2,5 %, milk 2,6 %, eggs 4,8 %, vegetables 3,3 %). Organic sales decreased 5 % during 2003-2004. Only sales of organic eggs increased. Willingness to increase the share of organic has decreased among farmers, processors, retailers and catering sector.

Distribution of organic sales: 24 % vegetables, 17 % milk, 11 % bred, 7 % flours and flakes, 32 % other (coffee, tea, honey, processed food) and 9 % fruits.

Product	Share of total	Production %	Sold as organic
Milk	1,0	1,0	100
Beef	0,8	1,5	65
Sheep, goat	15,7	5,8	90
Pork	0,5	0,4	75
Broiler	0,1	0,0	34
Eggs	2,7	2,6	90

Table 13 Organic animal products:

4 % of consumers in Finland use organic products over 6 %, 16 % of consumers use 1,2-6 %, 40 % 0,5-1,2 % and 40 % of consumers don't use organic products at all. The most of the organic consumers live in the big cities. Over 90 % of organic food is sold in the supermarkets.

In Finland are two own organic labels: a formal sun label and an organic association's ladybird label. Ladybird label has stricter requirements and it is granted only to Finnish products. In Finland is also used the organic label of EU and Demeter label.

Sun label

Ladybird label

Consumer prices

Table 14 Consumer prices in Finland

Product	Organic product €/kg	Conventional product €/kg
Rye bred	4,11	3,25
Wheat flour	1,06	0,60
Ground meat (beef)	9,66	4,75
Cheese	12,48	10,09
Banana	2,56	1,62
Coffee	16,77	4,46
Milk	1,03	0,74
Eggs	5,67	2,19
Potato	0,70	0,59
Onion	2,39	1,73
Tomato	4,49	2,59

Problems

There are many problems in organic food marketing in Finland. The supply of the organic food doesn't meet the demand. On the other hand interest in organic products has decreased and the most important reason is too high prices. Supermarkets do not want to boost organic markets.