

POLAND



Report on the Status of Organic Agriculture and Industry in Poland

Gefördert durch



Bundesministerium
für Ernährung
und Landwirtschaft

BÖLN

Bundesprogramm Ökologischer Landbau
und andere Formen nachhaltiger
Landwirtschaft

aufgrund eines Beschlusses des
Deutschen Bundestages

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Disclaimer

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This report has been prepared to the best of our knowledge and belief. We cannot however accept any guarantee for the accuracy, correctness or completeness of the information and data provided.

Content

A Poland: Facts and Figures	3
<hr/>	
B State and Development of Agricultural Production	5
Climate and Natural Condition	
Agricultural Holdings and Production	
Crop Structure and Harvests	
Livestock Production	
Economic Indicators of Agricultural Production	
Import and Export of Agricultural Products	
<hr/>	
C The Organic Sector in Poland	8
History of Organic Farming	
Number of Organic Producers and Area under Organic Production	
Crop Structure	
Organic Plant and Animal Production	
Legislation and Control System	
Institutions in the Organic Farming and Organic Control System	
Control Bodies (CBs)	
Other Stakeholders	
Organic Producers' Organisations	
Non Governmental Organisations (NGOs) Supporting Development of Organic Farming	
Organic Trade Fairs	
State Financial Support for Organic Farming	
Organic Food Processing	
<hr/>	
D The Organic Market	21
Status and Development of Sales of Organically Produced Food	
Organic Sale Channels	
Specialized Shops	
Super, Hypermarkets and Discount Stores	
Organic (Bio) Supermarkets	
Convenience Shops, Drug Stores	
Online and Direct Sales	
Intra EU Trade of Organic Products	
Organic Food Consumers	
<hr/>	
E Import and Export of Organic Products	26
Key Imported Organic Agri-Food Products	
Origin of Organic Imports	
Organic Exports	
Outlook	
<hr/>	
F References	29

Poland: Facts and Figures

Map



Figure 1: Map of Poland with administrative units (voivodships)

Country Statistics

312,705 km²

Total area of the country

38,265 thousand

Population (2020)

13,640 €

GDP per capita at current prices (2020)

14,682 thousand hectares

Utilized agricultural area (2020)

1,317 thousand

Number of farms (2020)

11.1 ha

Average area of agricultural land on the farm (2020)

2.4 %

Share of agriculture, forestry and fishing in GDP (2020)

9.40 %

Share of the population employed in agriculture (2020)

Organic Area and Operators

18,575

Number of organic farms including in conversion (2020)

509,291.27 ha

Total area under organic production (2020)

108,439.01 ha

Agricultural area under conversion to organic (2020)

400,852.25 ha

Certified organic area (2020)

Organic Animal Production

696,153

Number of poultry (2020)

31,102

Number of cattle (2020)

27,088 thousand

Egg production (pieces) (2020)

28,725 thousand liters

Milk production (2020)

3,253

Number of pigs (2020)

State and Development of Agricultural Production

In 2020 there were 1,317 thousand agricultural holdings in Poland. The prevailing trend, recorded for at least two decades, consists in a decrease in the number of farms, while the agricultural area remains at a similar level.¹ The number of farms has dropped by almost 13 % in the last decade. But their average size has increased from 11.3 hectares to 12.4 hectares over that period. The total agricultural area was 14,637 thousand ha in 2020.

Climate and Natural Condition

Poland is a low-lying country, mean height above sea level is 173 m. Over 96 % of the territory is situated below 350 m ASL. Poland lies in a zone where the influences of the continental European (relatively dry summers and cold winters) and temperate climates compete with the influence of the Atlantic climate. The climate of Poland is characterized by great variability of weather and significant changes in the course of the seasons in subsequent years. The average annual temperature ranges from 6.0 °C to 8.8 °C.² The variation in air temperature affects the length of the growing season and the period of active plant growth. The frosts frequently occurring in early spring pose threat to agricultural and horticultural crops. On average, the growing season in Poland lasts 214 days, ranging from 199 to 233 days depending on the region. The average annual rainfall is 500–600 mm in the lowlands and 1200–1500 mm in the uplands and the mountains.³ The periodic appearance of droughts is a characteristic feature of the Polish climate. In 2020 a strong rainfall deficit appeared

in Poland's north-west, the Coast, and South Baltic Coastlands that impacted agricultural production. In Poland there are 35 different types of soils with brown soils, acid brown soils, grey brown podzolic soils being the most common. The brown and podzolic soils together cover more than half of the country's area (52 %).⁴ A much smaller area is covered by chernozem soils, rendzina soils, black soils and alluvial soils. Acidification is one of major problems for soil protection in Poland.⁵ Frequent rainfall shortages combined with low soil quality have a negative impact on agricultural productivity.

1 see <https://stat.gov.pl/obszary-tematyczne/rolnictwo-lesnictwo/psr-2020/powszechny-spis-rolny-2020-raport-z-wynikow,4,1.html>

2 see <https://www.imgw.pl/sites/default/files/2021-04/imgw-pib-klimat-polski-2020-opracowanie-final-eng-rozkladowki-min.pdf>

3 ibidem

4 see <https://stat.gov.pl/en/topics/environment-energy/environment/environment-2019,1,11.html>

5 see https://iung.pl/sir/zeszyt63_1.pdf

Agricultural Holdings and Production

In 2020 there were over 1.3 million agricultural holdings in Poland that occupied 14.7 million ha and kept 10.2 million live stock units (LSU). There is a gradual increase in the percentage of the largest farms, with an area of 50 ha and more of utilized agricultural area (UAA), which in 2020 amounted 3.0 % but still over a half (52.1 %) were up to 5 ha UAA.⁶

The average area of agricultural land on the farm, which has been steadily increasing for years amounted to 11.1 ha in 2020. In 2020, the total sown area was about 10.7 million hectares, and compared to the year 2019 decreased by 1.4 %. The UAA remains quite stable – 14.7 million hectares corresponding to 46 % of the whole country – suggesting that small holdings are taken over by bigger ones.

Crop Structure and Harvests

In 2020 the largest area was occupied by cereals (69.0 %), including wheat (22.1 %) and triticale (12.9 %).⁷

There has been pronounced an upward trend in the harvest of cereals. In 2020 the harvest of cereals was higher as in 2019 and reached 35,500 thousand tonnes. The harvest of field vegetables in 2020 amounted to 3,868 thousand tonnes and was 0.5 % higher compared to the previous year, while the production of vegetables grown under cover decreased by 9.6 %.

The increase in production took place despite unfavorable weather conditions. The harvest of fruit from trees exceeded 3,900 thousand tonnes in 2020 and was 12.8 % higher than the preceded year, whereas the harvest of soft fruit in orchards and berry plantations amounted to almost 554 thousand tonnes and increased by 16.4 %. Poland is one of the main producers of apples, sour cherry, strawberries, currants, raspberries in Europe.⁸ A little more than one quarter (26.6 %) of the EU-27's harvested apple production came from Poland in 2019.⁹

Livestock Production

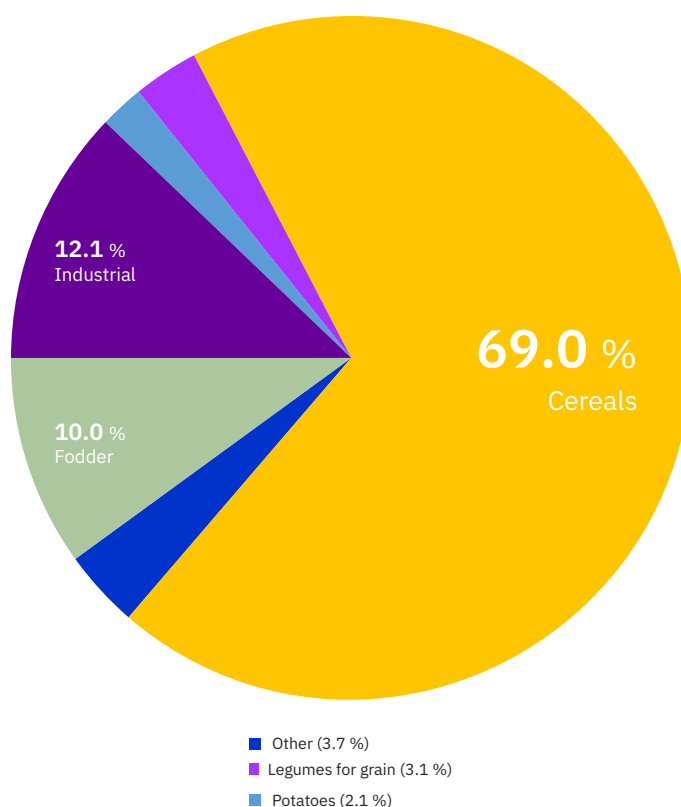
In 2020 the population of the main species of livestock on farms was 6,306 thousand heads of cattle including 2,475 thousand dairy cows, 11,153 thousand heads of pigs.¹⁰ The poultry population reached 225,636 thou-

sand heads including 55,082 thousand laying hens. The number of cattle and pigs per 100 ha increased as compared to 2010 respectively by 10 and 25 %.

Among the EU Member States, Poland has the highest production of poultry meat (2.6 million tonnes). Poultry annual meat production increased in 2019 by 1.9 %, continuing upward trend.¹¹ By contrast, pig production fell in 2020. The pig sector undergoes significant turbulences due to the outbreak of African Swine Fever disease (ASF).

In 2019 milk production increased by 2.3 % (14.1 billion liters) continuing a generally upward trend recorded in recent years.

Table 1: The structure of sowing area (2020)



6 see <https://stat.gov.pl/en/topics/agriculture-forestry/agriculture/agriculture-in-2020,4,17.html>
 7 see <https://stat.gov.pl/en/topics/agriculture-forestry/agriculture/agriculture-in-2020,4,17.html>
 8 see https://www.fruitlogistica.com/FRUIT-LOGISTICA/Downloads-Alle-Sprachen/Auf-einen-Blick-European_Statistics_Handbook_2020.pdf
 9 see <https://ec.europa.eu/eurostat/web/products-statistical-books/-/ks-fk-20-001>
 10 see <https://stat.gov.pl/obszary-tematyczne/rolnictwo-lesnictwo/psr-2020/powszechny-spis-rolny-2020-raport-z-wynikow,4,1.html#>
 11 see <https://ec.europa.eu/eurostat/web/products-statistical-books/-/ks-fk-20-001>

Economic Indicators of Agricultural Production

About one half (48.9 %) of the value of the total output of the Poland's agricultural industry in 2020 came from crops (12.9 billion EUR), within which cereals and vegetables followed by industrial crops and fruits had the largest share. 48.5 % of total output came from animals and animal products (12.8 billion EUR), a majority coming from milk, poultry, and pigs. Agricultural services (592 million EUR) and inseparable non-agricultural activities (89 million EUR) contributed with 2.6 % to agricultural output.

Import and Export of Agricultural Products

There is a steady increase in Polish foreign trade in agri-food products observed since Poland's accession to the EU. In 2020 export of food, agriculture and fishery products accounted for 14,3 % of total value of Poland's export. The value of export of agri-food products increased in 2020 by 11.3 % as compared to 2019.¹²

Poland is an important producer and exporter of apples, poultry meat, carrots, onion, white cabbage, triticale, currants and mushrooms in the EU.

In 2020 meat and meat products mainly poultry meat, processed meat, beef and pork had the largest share (19 %; 6.3 billion EUR) in the commodity structure of exports. The next group was cereals (14 %; 4.9 billion EUR) followed by tobacco and tobacco products (12%; 4.2 billion EUR), sugar and confectionery (72.5 billion EUR), dairy products (7 %; 2.3 billion EUR) and fish and fish products (7 %; 2.3 billion EUR).

The most important export countries were Germany, the Czech Republic, Great Britain, France, Italy, the Netherlands, Russia, Sweden, the United States and Hungary. In the structure of the exports of agri-food products, exports to other EU countries prevail – 71 % of products were sold on EU internal market.

In 2020 import of agri-food products accounted for 9.9 % of the total import to Poland and grew by 9.9 % as compared to 2019.¹³ Agri-food products were mainly imported from Germany, China, Italy, Russia, the Netherlands, France, the Czech Republic, the United States, South Korea and Belgium. The main imported product categories were fish and seafood, meat and edible pluck, fruit and vegetables.

Table 2: Output value of the agricultural industry at current prices (2020)

Category	Million EUR	%
Cereals	4 658.40	17.64
Industrial crops	2 015.82	7.63
Forage plants	854.46	3.24
Vegetables (incl. horticultural products)	2 722.80	10.31
Potatoes (incl. seeds)	723.14	2.74
Fruits	1 932.05	7.32
Other crop products	18.39	0.07
Cattle	1 763.83	6.68
Pigs	2 412.12	9.13
Sheep and goats	13.22	0.05
Poultry	3 008.85	11.39
Other animals	11.18	0.04
Milk	4 200.95	15.91
Eggs	1 315.92	4.98
Other animal products	67.88	0.26
Services , secondary act.	681.45	2.58
Total output agricultural industry	26 405.78	-

¹² see <https://stat.gov.pl/en/topics/agriculture-forestry/agriculture/agriculture-in-2020,4,17.html>

¹³ ibidem

The Organic Sector in Poland

Development of organic farming in Poland dates back to the 1920s and biodynamic movements but despite the early beginning, the recent history of organic agriculture could only begin in the 1980s with political and economic transformation started. There are good growth prospects for organic farming in Poland due to environmental conditions and high production potential of the agri-food sector. Demand for organic food in Poland is increasing but organic food market is still remains a niche.

History of Organic Farming

Development of organic agriculture in Poland began in the 1980s but interest in alternative agriculture started in mid 1920s.

Senator Stanisław Karłowski, inspired by the idea of biodynamic agriculture, presented by Rudolf Steiner during the series of lectures for landowners in 1924 in Kobierzyce near Wrocław, started to manage his 1730 ha estate in accordance with principles of biodynamic agriculture. Karłowski propagated biodynamic methods, organized courses, and because of his initiative in 1938 was founded the **Society to Inculcate the Principles of Life and Economy in Harmony with Nature** whose members were eminent representatives of the academic community.¹⁴ Shortly after the outbreak of the Second World War Karłowski was arrested and murdered. After the Second World War his estate was nationalised, and the idea of biodynamic agriculture was abandon.

In the 1960s, Eng. Julian Osetek – a chemist by profession – started to manage his three-hectare farm in Nakło-nad-Notecią in line with principles of biodynamic agriculture. With no followers, he worked alone for many years.¹⁵ More widespread interest in biodynamic agricul-

ture emerged in the 1980s, when professor Mieczysław Górny from Warsaw University of Life Sciences inspired by a lecture of Julian Osetek engaged in the promotion of this method. Professor Górny, who was a forester by education and dealt with soil ecology found in biodynamic agriculture practical application for theoretical knowledge.

Despite the unfavorable attitude of the then institutions of the agricultural sector and Academia, the interest in the idea of agriculture “in harmony with nature” was growing. At the initiative of Prof. Górny and in cooperation with experts and organic farmers from various European countries, numerous courses and trainings on organic farming were organized.

In 1983, Prof. Górny gave rise to establishment of the Agroecology Unit later transformed into Department of Food Ecology at the Faculty of Human Nutrition and Rural Household of Warsaw University of Life Sciences, which contributed to recognition of organic farming among the Academic Community.¹⁶

14 Tyburski and Żakowska-Biemans, 2007

15 Tyburski, 1996

16 Górny, 2002

In February 1989 – during one of the organic farming courses – a decision was made to create an association to represent the organic farming movement. And subsequently, with the founding convention on April 1, 1989, held in the auditorium of the Nicolaus Copernicus University in Toruń. **The Association of Ecological Food Producers EKOLAND** was registered in court on September 1, 1989.

At the same time, in 1989, the pioneers of the organic farming movement from Poland, Czechia (Czechoslovakia), East Germany and Latvia (The Russian Republic of Latvia) initiated cooperation with the **International Federation of Organic Agriculture Movements (IFOAM)**, which triggered further development of organic farming in the whole region.¹⁷

In 1990, the EKOLAND Association carried out the first farm inspection, and out of 32 farms, 27 received the “attest”.¹⁸ The first criteria of organic farming of the EKOLAND Association were published in 1994. Currently EKOLAND is the only producer organization with its own private standards and logo.

In 1993, another organization for organic producers was established in Lublin, the Polish Society of Ecological Agriculture.

In 1996, the first independent control unit, Agro Bio Test, was set up on the basis of the Inspection and Attestation Commission operating within the structures of EKOLAND, and in 1998 another control unit – Bioekspert – started its control activities.

In the years 1991–1996 not only the number of organic farms went up from 49 to 236, but also the area under organic production increased more than tenfold and reached 6,855 ha.

Since 1997, a decrease in the number of farms and the area under organic management has been observed – both of which have contributed to initiating the dialogue between the organic farming movement and state institutions that operate in the area of Agriculture.

In the 1990s, the process of **institutionalisation** of organic farming began: in 1997 cooperation between the organic farming movement and the Ministry of Agriculture and Food Economy was formalized through creation of an organic-farming working group.

Since 1998, despite the lack of legal regulations, organic production has been supported with **subsidies** from the state budget. Under the Regulation of the Minister of Agriculture and Food Economy on the amount of subsidy rates for agriculture (May 11, 1998), and detailed rules and procedure for subsidizing of 1998 (Journal of Laws No. 71, it. 461), funds were allocated to subsidize the costs of controlling organic farms.

From 1999 onwards, organic and in conversion farmers were permitted to apply for area payments. With the first act on organic farming passed and approved of in 2001, a control and certification system was established in which the Minister of Agriculture and Rural Development became the one in charge of authorizing private certification bodies to conduct control and issue certificates. Supervision over the authorized certification bodies has been delegated to the Chief Inspectorate for the Purchase and Processing of Agricultural Products.

Introduction of the support system contributed to the increased interest in converting farms into organic ones. In the years 2000–2004, the area under organic management increased from 25,000 ha to 82,730 ha. The number of organic farms reached 3,760 in 2004 and grew almost threefold as compared to 2000.

In 2004, upon **accession to the European Union**, Poland implemented Council Regulation (EEC) No. 2092/91 of June 24, 1991 on organic production of agricultural products and labeling of agricultural products and foodstuffs (Journal of Laws L 198 of July 22, 1991, p. 1). Financed from the second pillar of the Common Agricultural Policy (CAP) of the EU under the Rural Development Program for 2004–2006, the system of subsidies for organic farming was launched.

The agricultural policy implemented after 2004 resulted in further increase in the number of farms and area under organic management, but it failed to trigger market effect. From 2013 on, both the number of farms and the area of organic farming began to shrink. Unfavourable changes were also recorded with regard to the number of livestock. Many producers have given up on organic livestock farming due to excessive bureaucratic burdens, particularly acute for smaller farms.

Lack of coherent strategy to boost the development of organic farming and organic food sector in Poland resulted in slower growth. The share of area under organic production (3.5 %) is still well below the EU average (8.5 %). The demand for organic food is growing but organic sector still struggles for attention at the state policy level. The growth of organic area in Poland is not increasing at the same pace as the organic market. As a result, a significant volume of organic food comes from intra EU trade.

¹⁷ Geier, 1990

¹⁸ Babalski, 1999

Number of Organic Producers and Area under Organic Production

After joining the EU, Poland experienced a remarkable growth in the number of organic farms and area under organic production. In the years 2004–2013, the area under organic production increased from 82,730 ha to 669,969 ha and the number of organic farms grew more than sevenfold.

In 2020, there were 20,274 organic producers, including 18,575 agricultural producers, cultivating a total of 509,291 ha land including areas in conversion. Compared to 2013, the number of organic farms in 2020 decreased by 30 % and the area under organic production declined by 24 %.

The share of organic farming in the agricultural area of the country in 2020 was about 3.5 % of the total agricultural area.

Organic farms in Poland are bigger than their conventional counterparts. The average area of organic agricultural land in organic farms was about 27.4 ha in 2020, while the average area of utilized agricultural land per farm in Poland is slightly above 11 ha.¹⁹

There are significant differences in terms of the number of organic farms and area under organic production among the macroregions (NUTS 1)²⁰ and voivodships (NUTS 2) of Poland. More than half of all organic farms and area under organic management were located in four voivodships: Warmińsko-Mazurskie, Podlaskie, Mazowieckie and Zachodniopomorskie.²¹

Organic farms located in the Warmińsko-Mazurskie and Zachodniopomorskie voivodships are large-scale, many specialize in the production of cereals intended for foreign markets. In Podlaskie and Mazowieckie voivodships, farms are smaller with more diversified production.

Since 2004, the share of small farms has been declining, while the number of larger farms continue to increase. In 2020, farms with an area up to 10 ha accounted for 37.4 % of all organic farms, while in 2004 their share was 44 %.

Table 3: The number of organic farms (2004–2020)

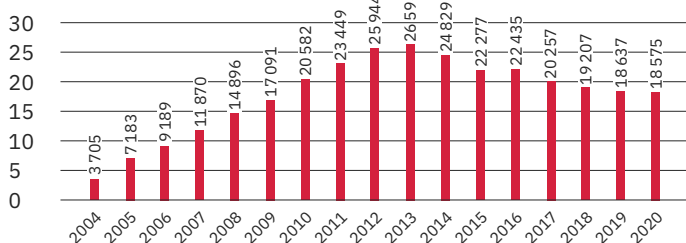


Table 4: The area under organic production (2004–2020 / ha)

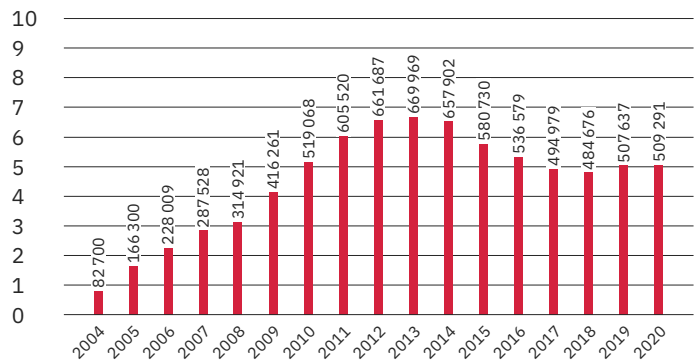
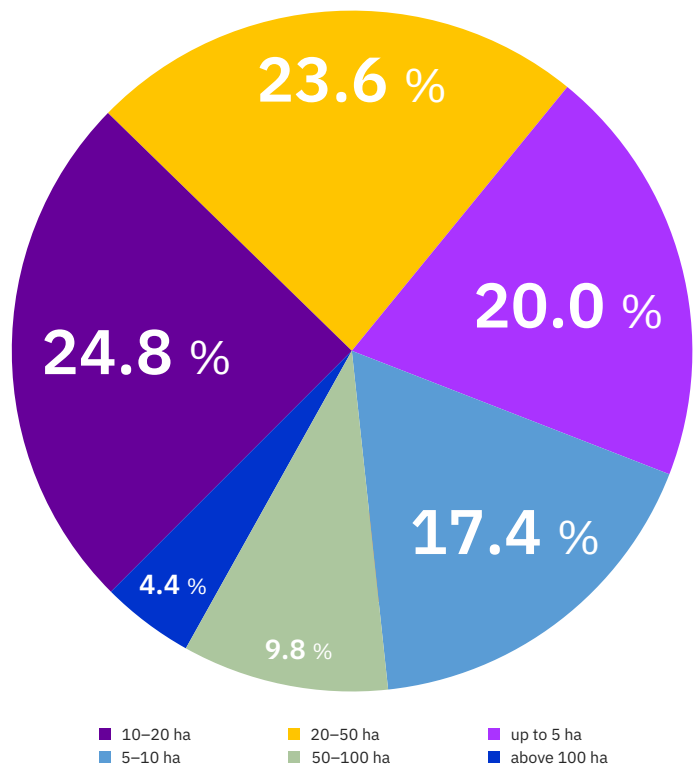


Table 5: The size structure of organic farms (2020)



19 see <https://stat.gov.pl/en/topics/agriculture-forestry/agriculture/agriculture-in-2020,4,17.html>

20 There are 7 NUTS (Nomenclature des Unités territoriales statistiques) administrative macroregions in Poland namely North, North West, Mazowieckie, Central, South West, South and East.

21 <https://stat.gov.pl/en/topics/agriculture-forestry/agriculture/agriculture-in-2020,4,17.html>

Table 6: Number of organic farms and area under organic production by macroregion and voivodship (2020)

Voivodship	Macroregion	Number of organic farms	Area under organic production (ha)	Share in AAU (%)
Dolnośląskie	South West	688	30 418	3.3
Kujawsko-pomorskie	North	385	7 093	0.7
Lubelskie	East	1 907	28 357	2.1
Lubuskie	North West	926	43 126	9.8
Łódzkie	Central	519	9 954	1.0
Małopolskie	South	664	8 360	1.4
Mazowieckie	Mazowieckie	2 179	41 218	2.1
Opolskie	South West	62	3 324	0.6
Podkarpackie	East	969	12 726	2.1
Podlaskie	East	2 906	52 415	5.0
Pomorskie	North	521	20 792	2.8
Śląskie	South	121	3 460	0.9
Świętokrzyskie	Central	590	8 340	1.6
Warmińsko-mazurskie	North	3 241	108 808	10.9
Wielkopolskie	North West	748	29 330	1.7
Zachodniopomorskie	North West	2 149	101 507	11.2
Poland		18 575	509 201	3.4

Table 7: The structure of the area under organic farming (2017–2020/%)

Crop category	2017	2018	2019	2020	Change (%) 2017–2020
Fodder crops	28.6	25.8	23.4	23.1	-19.23
Meadows and pastures	23.5	20.6	19.7	16.9	-28.09
Cereals	23.5	27.6	30.5	29.2	24.26
Horticultural and berry crops (fruit)	5.7	6.2	7.1	9.2	61.40
Vegetables	7.5	6.2	5.9	5.6	-25.33
Legumes for dry seeds	3.3	3.9	5.3	7.4	124.24
Industrial plants	5.7	7.0	5.4	4.7	-17.54
Other crops	1.9	2.4	2.5	3.6	89.47
Potatoes	0.3	0.3	0.2	0.3	0.00
Total	100	100	100	100	

Crop Structure

In 2020 cereals (29.2 %) and fodder crops (23.1 %) had the biggest share in the structure of organic crops (in conversion and certified). In 2017–2020 the share of the area under cultivation of cereals increased, while the share of the area under fodder crops, as well as meadows and pastures decreased.

In 2020 the area under cultivation of cereals increased by 31 % compared to 2017 and reached 113,986 ha. The area under vegetable cultivation amounted for 23 526 ha and declined by 10.5 % in 2020 as compared to 2017. Currently an upwards trend in the area under vegetables can be observed due to the growing domestic demand. The biggest growth was recorded in terms of area under fruit cultivation, which doubled in 2017–2020. Lubelskie, Mazowieckie and Podkarpackie voivodships have the largest area under fruit production. The production of vegetables is mainly concentrated in Warmińsko-Mazurskie, Lubelskie and Mazowieckie. The largest area under potatoes cultivation is located in Podlaskie, Warmińsko-Mazurskie and Lubelskie voivodships.²²

²² based on data from 2018

Table 8: Area of main organic crops (after conversion period) (2017–2020/ha)

Crop category	2017	2018	2019	2020	Change % (2017–2020)
Fruit	19 926	22 061	23 746	39 401	97.79
Vegetables	26 286	20 801	22 540	23 526	-10.50
Potatoes	1 416	1 124	1 064	1 392	-1.70
Cereals	86 981	99 095	117 871	113 980	31.04

Table 9: The share of area under main organic crops (2020)

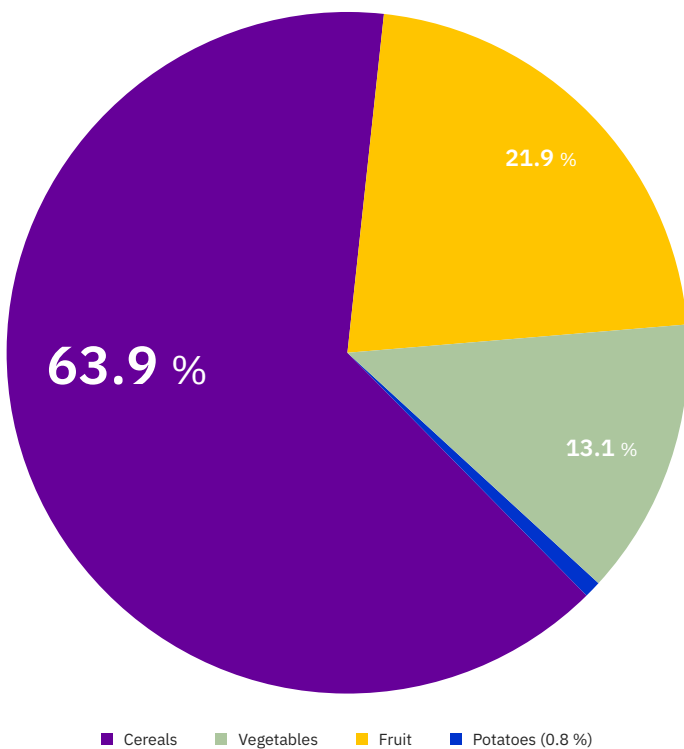


Figure 2: Organic apple orchard in Łódzkie voivodship

Organic Plant and Animal Production

The greatest changes in 2017–2020 were recorded in relation to the estimated production volume of fruit that increased by 217.9 %.²³ The estimated production of organic fruit in 2020 amounted to 164,337.6 tonnes, whereas the production of vegetables reached 89,036.6 tonnes and increased by 75.9 % as compared to 2017. A similar trend was observed in relation to the production of cereals (mainly wheat, triticale and oat), which in 2020 amounted to 315,269.2 tons and was 79.2 % bigger than in 2017.

In 2020 the most important fruit crops in terms of production volume included apples (105 601.89 t) and soft fruits like strawberries (8 011.51 t), raspberries (9 145.41 t), black and red currants, the latter are cultivated mainly in Podkarpackie, Lubelskie and Świętokrzyskie voivodships.²⁴ The cultivation of the American blueberry is also significant, mainly located on acidic soils in the eastern and northern part of the country.²⁵

In the years 2013–2020, along with the decrease in the number of organic farms, unfavorable changes were observed regarding the number of animals and livestock production. The share of farms with organic livestock decreased by more than half – from 44.2 % in 2013 to 21.8 % in 2020.

Only in terms of poultry there has been recorded systematic growth in the number of livestock. In 2020 the number of poultry increased by 212.8 % as compared to 2017. However, this applies primarily to laying hens. The number of other animal species varies from year to year. In the period from 2017 to 2020, there was a slight increase in the number of cattle, dairy cows and goats. The number of pigs remained at a similar level.

The production of organic milk in 2020 amounted to 28 725 115.0 liters. In turn, the egg production reached 27 088 160 pieces in 2020.²⁶

23 The data on the volume of organic production is collected during annual farm inspection to include on the certificate the volume of production to be marketed. As such it does not fully reflect the on farm production and must be considered as estimate.

24 own calculation based on data from Agricultural and Food Quality Inspection

25 see https://jemyeko.com/wp-content/uploads/2021/07/raport_05-07-2021.pdf

26 based on own calculation of data on milk and eggs production (for consumption) from Agriculture and Food Quality Inspection

Table 10: Estimated production volume of selected organic crops (after conversion period) (2017–2020/tonnes)

Crop category	2017	2018	2019	2020	Change % (2017–2020)
Fruit	51 702.2	117 365.3	166 992.2	164 337.6	217.9
Vegetables	50 627.1	50 557.3	70 389.3	80 036.6	75.9
Potatoes	19 335.1	15 562.7	14 779.3	22 575.2	16.8
Cereals	175 963.2	195 921.3	271 934.8	315 269.2	79.2

Table 11: Number of livestock (heads)

Category of livestock	2017	2018	2019	2020	Change % (2017–2020)
Cattle	8 096	7 486	8 320	8 341	3.0
Dairy cows	11 377	10 983	10 893	12 061	6.0
Poultry	220 540	316 064	484 153	696 153	212.8
Pigs	3 893	3 221	4 189	3 253	-16.4
Sheep	19 595	16 243	15 092	15 803	-19.3
Goat	3 147	3 145	5 270	3 645	15.8



Figure 3: Organic farm with laying hens

Legislation and Control System

Organic farming in Poland is regulated by EU law:

- Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007 (OJ L 150, 14.6.2018, p. 1–92).
- In 2009, Poland passed the Act of 25 June 2009 on Organic Farming (Journal of Laws 2009, No 116, item

975) that provides the legal framework for the official control system for organic production and labelling of organic products. It specifies the Cas' tasks and competences and provides for fines to be imposed on CBs and operators where serious cases of non-compliance are found.²⁷ Due to the need to adapt Polish regulations to the amended EU regulations on organic production, the new law will be passed in 2022.

Poland adopted a mixed control system in organic farming comprising of a designated public control authority and approved private control bodies accredited by national accreditation body – Polish Center for Accreditation.

Institutions in the Organic Farming and Organic Control System

Ministry of Agriculture and Rural Development (MARD)



Ministry of Agriculture and Rural Development (MARD) is the Central Competent Authority (CCA) for the control system on organic production and labelling of organic products in Poland. MARD is in charge of approving CBs to which the task of controls and certification of operators is delegated. It is also responsible for policy implementation on organic farming and preparation of national legislation.

www.minrol.gov.pl

Polish Centre for Accreditation (PCA)



The Polish Centre for Accreditation is the national body responsible for accreditation of Control Bodies certifying in accordance with the most recent version of ISO standard IEC 17065:2012. The checks performed by accreditation body concern the technical competence, the independence, the impartiality, and the professional integrity of the control bodies).²⁸

www.pca.gov.pl

Agriculture and Food Quality Inspection (AFQI)



The Agriculture and Food Quality Inspection (AFQI) supervises CBs and is responsible for data collection and reporting on organic farming. Since 2013, AFQI conducts also state examinations to obtain the qualification of organic farming inspector and keeps register of qualified inspectors.

www.ijhars.gov.pl

²⁷ see https://ec.europa.eu/food/audits-analysis/audit_reports/details.cfm?rep_id=3058

²⁸ see https://www.eca.europa.eu/Lists/ECADocuments/SR19_04/SR_organic-food_EN.pdf

Control Bodies (CBs)

Authorized control bodies, accredited in the field of organic farming in accordance with the requirements set out in the latest versions EN ISO/IEC 17065 are responsible for on-spot controls of operators (farmers, processors, distributors, importers). CBs issue, suspend and with-

draw certificates of compliance with the requirements of EU organic law.

Currently, there are 13 CBs approved in Poland. The authorization of CBs is granted in six different areas: plant production and animal husbandry, wild collection of plants and parts thereof, beekeeping, aquaculture and seaweed, processing of organic products and production of feed and yeast, placing goods on the market including import from third countries.

Table 12: List of control bodies and the scope of their authorization (2021)

Certifying body	Plant production and animal husbandry	Wild collection of plants and parts thereof	Beekeeping	Aquaculture and seaweed	Processing of organic products and production of feed and yeast	Placing goods on the market incl. import from third countries
PL-EKO-01 EKOGWARANCJA PTRE Sp. z o.o. (↳)						
PL-EKO-02 PNG Sp. z o.o. (↳)						
PL-EKO-03 COBICO Sp. z o.o. (↳)						
PL-EKO-04 BIOEKSPERT Sp. z o.o. (↳)						
PL-EKO-05 BIOCERT MAŁOPOLSKA Sp. z o.o. (↳)						
PL-EKO-06 Polskie Centrum Badań i Certyfikacji S.A. (↳)						
PL-EKO-07 AGRO BIO TEST Sp. z o.o. (↳)						
PL-EKO-08 TÜV Rheinland Polska Sp. z o.o. (↳)						
PL-EKO-09 Centrum Jakości AgroEko Sp. z o.o. (↳)						
PL-EKO-10 SGS Polska Sp. z o.o. (↳)						
PL-EKO-11 DQS Polska Sp. z o.o. (↳)						
PL-EKO-12 Bureau Veritas Polska Sp. z o.o. (↳)						
PL-EKO-13 Krajowe Centrum Badań i Certyfikacji "Gwarantowana Jakość" Sp. z o.o. (↳)						

Other Stakeholders

Polish Chamber of Organic Food (PIŻE)



The Polish Chamber of Organic Food (PIŻE) is an organization of organic food business operators. It has over 100 members (farmers, producers, shops, distributors of organic food). The mission of the Chamber is to promote healthy lifestyle and to rise awareness on organic food and farming in Polish society. Promotion of organic farming takes place mostly by organizing multiple social campaigns, fairs and other business events.

www.jemyeko.pl



Figure 4: Debate on organic food market organized by The Polish Chamber of Organic Food in 2020

The National Support Centre for Agriculture (KOWR)



KOWR is a Polish governmental agency that offers support to foreign operators searching for Polish business partners by organizing trade missions for importers and providing foreign stakeholders with information on Polish agri-food markets. KOWR manages promotional activities dedicated to high-quality products including organic products and implements promotion policy instruments in the agri-food sector.

<https://www.kowr.gov.pl/en>

Agricultural Advisory Centre (AAC)



Agricultural Advisory Centre (AAC) Branch in Radom operates within the state agricultural advisory system. AAC Branch in Radom is responsible for training of advisers in the field of organic farming and coordinates a network of organic demonstration farms.

<https://www.cdr.gov.pl/>

Organic Producers' Organisations

EKOŁAN Kujawsko Pomorskie Stowarzyszenie Producentów Ekologicznych EKOŁAN.

<http://eko-lan.pl/>

Stowarzyszenie Demeter Polska

<https://demeter-polska.pl/>

Stowarzyszenie Eko Lubelszczyzna

<http://www.ekolubelszczyzna.pl/>

Stowarzyszenie Producentów Żywności Metodami Ekologicznymi EKOLAND

<http://www.ekolandpolska.pl/>

Stowarzyszenie Producentów Żywności Ekologicznej EKO DAR

<https://ekodar.swilcza.com.pl/>

Podkarpacka Izba Rolnictwa Ekologicznego

<https://pire.swilcza.com.pl/>

Stowarzyszenie Polskich Sadowników Ekologicznych

<https://ekoowoc.pl/>



Figure 5: Stand of the Association of the Polish Organic Fruit Growers in Łódzkie voivodship

Zachodniopomorski Oddział Stowarzyszenia Producentów Żywności Metodami Ekologicznymi

<http://www.ekolandzach.pl/>

Polska Ekologia

<https://www.polskaekologia.org/>

Non Governmental Organisations (NGOs) Supporting Development of Organic Farming

Forum Rolnictwa Ekologicznego im. Profesora Mieczysława Górnego

<http://www.forumrolnictwaekologicznego.pl/>

Stowarzyszenie Ekologiczno-Kulturalne ZIARNO

<http://ziarno.grzybow.pl/>

Polski Klub Ekologiczny w Gliwicach

<https://pkegliwice.pl/>

Koalicja Żywa Ziemia

<https://koalicjazywaziemia.pl/>

Organic Trade Fairs

International Organic Trade Fair BIOEXPO

<https://bioexpo.pl/>



Figure 6: Stand at Vegetable processing company Charsznickie Pola Natury at Organic Trade Fair BIOEXPO 2021

Ekogala

<https://www.ekogala.eu/>

Natura FOOD & beECO

<https://www.naturafood.pl/>



Figure 7: Offer of organic farm Farma Świętokrzyska at BIOEXPO Organic Trade Fair 2020

Info

Information portal on organic food and farming BIODURIER

<https://biokurier.pl/>

Table 13: Organic farming support measures (2021)*

No.	Organic farming package	Variants of organic farming package	Payment rates EUR / ha*
1	Agricultural crops in-conversion		313.9
2	Vegetable crops in-conversion		478.7
3	Herbal crops in-conversion		356.1
4	Fruit crops during conversion period	Basic fruit crops in-conversion	551.4
		Berry crops in-conversion	476.6
		Extensive fruit crops in-conversion	218,2
5	Fodder crops on arable land in-conversion		234.1
6	Permanent grassland in-conversion		134.3
7	Agricultural crops after conversion		253.3
8	Vegetable crops after conversion		307.8
9	Herbal crops after conversion		356.1
10	Fruit crops after conversion period	Basic fruit crops after conversion	373,8
		Berry crops after conversion	417.2
		Extensive fruit crops after conversion	218.2
11	Fodder crops on arable land after conversion		162.6
12	Permanent grassland after conversion		134.3

State Financial Support for Organic Farming

Organic farming in Poland is currently supported within the EU Rural Development Programme (RDP) 2014–2020 that has been extended for the years 2021–2022 due to delays in implementing the new policy measures under EU Common Agricultural Policy (CAP) 2021–2027. On 8 March 2021, the Ministry of Agriculture and Rural Development introduced a new regulation (Dz.U. 2021 poz. 434) amending the detailed

conditions and procedure for granting financial aid under measure 11 “Organic farming” covered by the RDP for 2014–2020. The payment rates for organic farming increased as compared to 2020 from 17 up to 55.3 % (average increase of 27.8 %), depending on the package and variant. Additionally organic producers can apply for reimbursement of control costs under the aforementioned measure.

* Euro Exchange rates Table NBP 2021-November-29
(1 EUR = 4.6982 PLN)

Organic Food Processing

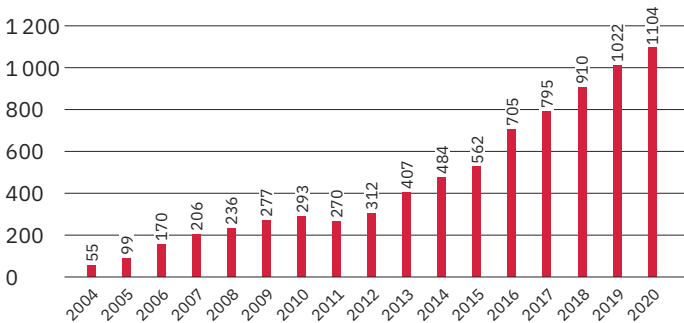
Poland has the largest food processing sector in Central and Eastern Europe and is the sixth largest producer of food products in the EU.²⁹ The most important segments in terms of value were meat, dairy, beverage, confectionary, and bakery.

The food industry is one of the most fragmented sectors in Poland. Most of the enterprises within the sector are SMEs. However, their contribution to the total sales of the sector account for a minor share of 13 %, which indicates that the market is strongly dominated by larger companies.

The vast majority of organic food processors in Poland are small and medium-sized enterprises, often family run businesses. However, the sector attracts more and more large-scale processors extending their portfolio with organic lines.

In 2020 according to the data of the Agriculture and Food Quality Inspection there were 1104 entities classified as dealing with preparation of organic food. Pursuant to Art. 2 Council Regulation (EC) No 834/2007 preparation means the operations of preserving and/or processing of organic products, including slaughter and cutting for livestock products, and also packaging, labelling and/or alterations made to the labelling concerning the organic production method. Thus, this group covers processors as well as food packers.

Table 14: The number of entities dealing with “preparation” of organic products (2004–2020)



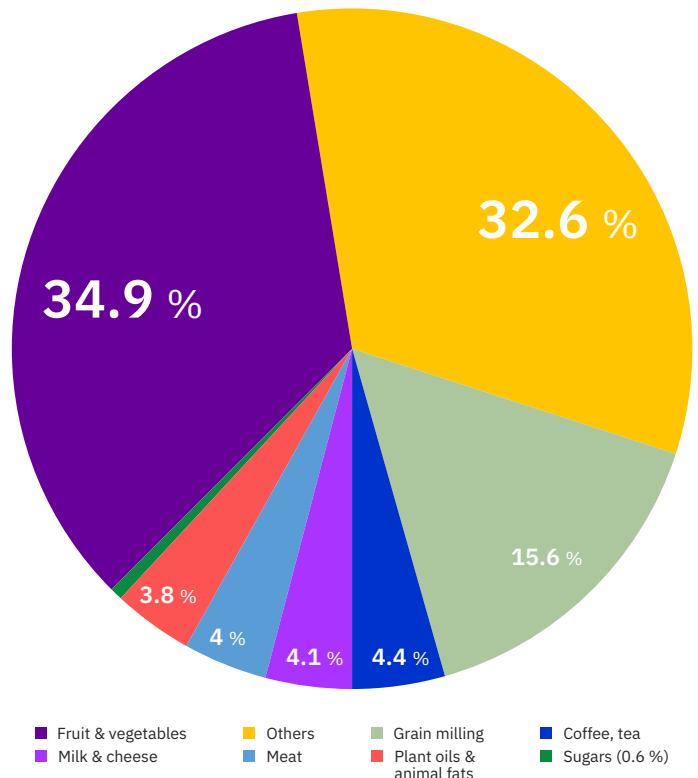
In the 2004–2020 the number of entities classified under category “preparators” grew from 55 to 1,104. In 2020 there were 668 organic processors and 218 entities dealing with preparation and packaging of organic products. The remaining entities did not carry any operations with organic products. 34.9 % of processors were involved in the processing of fruit and vegetables, whereas 15.6 % processed cereals. The share of oper-

ators processing products of animal origin was significantly lower. There were only 4.1 % entities involved in milk processing and cheese production, and 4.0 % in meat processing.

The highest number of processors deals with fruit and vegetables due to relatively good access to raw material and growing demand. Among entities classified as organic processors there are several large-scale cold stores delivering frozen fruit and vegetables to foreign markets. This products category still has marginal share in the domestic market but the interest in frozen organic products is growing.

The share of organic processed products of domestic origin steadily increases. Companies operating in the organic food market focus on introducing new products categories and varieties. Organic food manufacturers are coming up with new and innovative organic food products in the form of ready-to-eat snacks, cookies, pulses, spices, medical plants, herbs and organic juices.

Table 15: Share of organic processors by product category (2020)



²⁹ see <https://www.fi-compass.eu/publication/publications/financial-needs-agriculture-and-agri-food-sectors-poland>

The Organic Market

The value of the Polish organic food market exceeded EUR 300 million in 2019 (gross retail prices)³⁰ and grew by 20 % in 2020. The organic market is expected to expand at a CAGR³¹ of 9.4 % and is anticipated to reach around EUR 600 million by 2026.³² Organic products, particularly organic packaged goods, become more prevalent in Poland, including the mainstream channels such as discounters and hyper-markets, which is one of the key drivers of the growth value.

Status and Development of Sales of Organically Produced Food

It is estimated that the organic food segment accounts for approximately 0.5 % of the value of the domestic food market. The organic food market is one of the fastest growing segments but from the perspective of the entire value of Polish FMCG market is still a niche category. Fresh fruits and vegetables have been the top selling category of organically grown food since the organic farms started retailing their products over three decades ago and still have a large market share.

According to NielsenIQ, in 2020 expenditure on organic food in non-specialized stores amounted to over PLN 776 million.³³ These data come from the Retail Trade Panel and concern only the categories covered by the survey, excluding fruit and vegetables, which are

among the most frequently purchased organic products. Compared to 2019, the value of the shopping cart increased by 23 %. The product categories generating the highest sales value were food for infants and children, yoghurts, plant-based beverages, as well as juices, nectars, and other beverages. In 2020, beverages were a category that recorded a significant increase in sales value compared to the previous year (69 %) and exceeded 1 % share of the entire category of juices, nectars and beverages in Poland.

30 see https://inozc.sggw.edu.pl/wp-content/uploads/sites/8/2021/06/Raport_MRiRW_pdf_2019_Institut.pdf

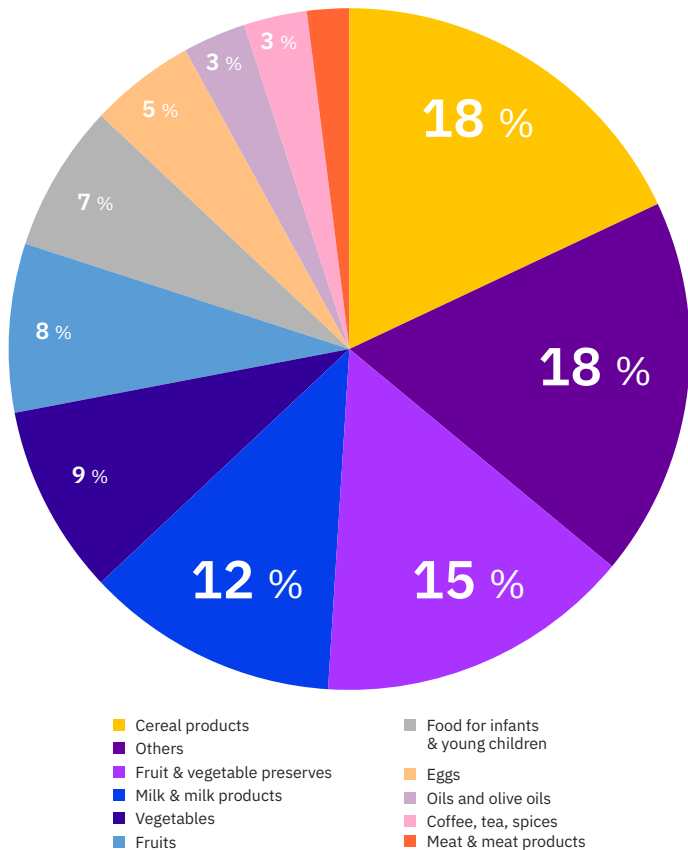
31 Compound Annual Growth Rate (CAGR)

32 see <https://retailmarketexperts.com/en/news/pmr-bio-food-market-grew-by-over-20-in-2020/>

33 see https://jemyeko.com/wp-content/uploads/2021/07/raport_05-07-2021.pdf

PMR Research's forecasts that the value of the organic food market in Poland will exceed PLN 1.7 billion in 2021, and CAGR will amount to 9.4 %.³⁴ In turn, per capita expenditure on organic food will increase, from around PLN 50 in 2021 to over PLN 70 in 2026.³⁵

Table 16: Value share of selected product categories in the organic food market (2019)*



as part of direct cooperation with suppliers or using commercial intermediaries. The largest organic food wholesaler, **Bio Planet**, with an estimated 25 % market share offers 7,000 SKUs, including 1,000 SKUs under private labels.³⁷ They deliver organic products to 1,800 B2B customers. The product categories with the highest share in sales include beverages, unprocessed products (fruit and vegetables), sweets and snacks, dairy products, dried fruit as well as oils and olive oil. About 60 % of the products offered by Bio Planet is of foreign origin, with main categories such as beverages, nuts, dried fruit, vegetable fats and products based on coconut and soybeans.

Super, Hypermarkets and Discount Stores

In the 1990s sale of organic food in large-format retailing grew steadily. Initially, the share of foreign products was significant, but the large format retailers gradually expanded their offer with products from domestic suppliers.

In 2002, the Polish branch of the British **Tesco** chain became interested in introducing organic vegetables and fruits from domestic crops to the assortment. Unfortunately, after a few months, the cooperation was discontinued due to the insufficient volume of deliveries, the lack of their diversification, and the inability to ensure their regular delivery.

Organic Sale Channels

In the 1980s organic food was sold directly from the farms, on farmers markets and on fairs. The first organic food stores were open in the late 1980s in large urban agglomerations.

Specialized Shops

According to expert estimates there are at least 850 stores specializing in the sale of organic food with an average sales area of 60 square meters.³⁶ These stores implement various strategies of operation, their assortment is dominated by processed food, but they systematically expand the offer with fresh food products

Info

Producer and distributor of organic food Bio Planet S.A.

<https://bioplanet.pl>

³⁴ ibidem

³⁵ see <https://mymr.pro/products/rynek-zywnosci-bio-w-polsce-2021>

* expert's estimate

³⁶ ibidem

³⁷ see https://bioplanet.pl/zasoby/obrazki/bioplanet-pl/relacje%20inwestorskie/BioPlanet_4_IPO_118_2021_DM_BOS_int.pdf

In 2007, **Carrefour** initiated cooperation with the organization of organic producers **Polish Ecology**. In April that year, organic products appeared on the shelves of a hypermarket in Warsaw for the very first time. After five years, organic products could be purchased in 17 Carrefour stores across Poland. Similar initiatives in trading organic food were undertaken by the national cooperative organization **Spółdzielnia Spożyców Społem**, that launched in 2005 the **Ecological Program**, under which organic food was offered at separate stands labelled with a slogan “Make an eco-decision”.³⁸

Currently, most large-format retail chains offer both organic processed and fresh products. Still, the supply of domestic fresh produce, especially seasonal fruit, and vegetables, does not meet the demand. As a result, fresh fruit and vegetables are also sourced from other EU and third countries.

A wide range of organic fresh and packaged products is offered by non-discount retail chains such as **Auchan**, **Carrefour**, **Leclerc** and two discounters **Biedronka** (belonging to the Portuguese Jeronimo Martins) and **Lidl** owned by the Schwarz-Gruppe. Among the discount chains operating on the Polish market, the first to sell organic food was Lidl. Since 2011, Lidl stores sell also fresh products, including fruit and vegetables from domestic suppliers.



Figure 9: The offer of fruit and vegetables at Carrefour hypermarket in Warsaw



Figure 8: The offer of products under private BIO label at Carrefour hypermarket in Warsaw

Info

Auchan

<https://www.auchan.pl>

Carrefour

<https://www.carrefour.pl>

Biedronka

<https://www.biedronka.pl>

Leclerc

<https://leclerc.pl>

Lidl

<https://lidl.pl>

38 see http://wzcz.sggw.pl/wp-content/uploads/2020/01/Raport_MINROL_15_11_2017_upowsz-1.pdf

The offer of organic food is also expanding in other discount chains, such as Kaufland (Schwarz-Gruppe), Aldi, Intermarche, Netto. However, organic meat and processed meat products are still not available on regular basis in discount shops. Both non-discount and discount retail chains focus on expanding the range of products under private labels. NielsenIQ data shows that private label products accounted for 40 % of the sales value in 2020.

According to PMR's latest forecasts in the years 2021–2026, discount stores will be the fastest-growing channel on the grocery market in Poland.³⁹ A survey conducted in 2021 by PMR revealed that over half of the organic consumers regularly buy organic food at discount stores.⁴⁰ The sales of organic foods in large-format retailers and discounts boost interest in organic category among Polish consumers.

Organic (Bio) Supermarkets

In 2019, the Carrefour chain opened the first bio supermarket. Currently they offer approximately 2,500 products, 80 % of which are bio products, while the remaining ones are dedicated to vegans and people with gluten and lactose intolerance.⁴¹ The company's strategy is to expand the range of organic products under private label. Currently, the Carrefour private label BIO brand includes over 400 products. In 2021, the chain began to develop the sale of organic food in selected hypermarkets using "store in store" format.

There are also retail chains in Poland that specialize in the sale of organic food. The oldest of them is **Organic Farma Zdrowia S.A.**, which currently has 32



Figure 10: The offer of fresh vegetables at Lidl stand during organic trade fair BIOEXPO 2021

stores throughout the country and runs online sales. The company's offer includes over 4,000 SKUs, including cosmetics and environmentally friendly cleaning agents.

In 2017, the first **Bio Family** store dedicated to the sale of organic food was opened in Poznań. Currently, the chain has six stores (offering organic food and cosmetics) located in large cities throughout the country. Bio Family stores operate in the form of 24/7 and self-service stores (access outside working hours via a mobile application).

Both Organic Farma Zdrowia and Bio Family developed a range of products under private labels.

Convenience Shops, Drug Stores

The food retail landscape in Poland differs from that of the main European countries. Retailing in Poland is characterized by a high share of traditional small- and medium-sized outlets, which are usually located in residential areas. Consumers tend to visit these shops several times a week for small purchases of first-need products. Most often, these stores like **Żabka** offer organic branded packaged products but also attempt to develop products under private labels and extend the offer with fresh organic produce.

Info

Organic Farma Zdrowia S.A.

<https://organic24.pl/>

BIO Family

<https://biofamily24.pl/>

Żabka

<https://www.zabka.pl>

Rossmann

<https://www.rossmann.pl>

39 see <https://retailmarketexperts.com/en/news/pmr-discount-stores-will-grow-above-7-annually/>

40 see <https://retailmarketexperts.com/en/news/pmr-bio-food-market-grew-by-over-20-in-2020/>

41 see https://serwiskorporacyjnycarrefour.pl/en/news/About_Us/The_First_Carrefour_Bio_Store_In_Poland_Is_Launched

Organic packaged food is also available in the drugstores like **Rossmann**, both as products under **enerBio** own brand, as well as with the manufacturers' brand. The assortment includes fruit and vegetable preserves, nuts, breakfast cereals, sweets, but also drinks and wine. Petrol stations and kiosks also tend to expand the offer of organic products but there are mainly snacks and drinks.

Online and Direct Sales

The COVID-19 pandemic has contributed to the growing interest in organic food in both traditional retail and e-commerce. According to experts' estimates, the number of online stores specializing in the sale of organic food has doubled in the last 2 years. The vast majority offer only processed products, while the share of stores providing customers with the possibility of regular purchases of fresh products remains small.⁴²

The sales of organic food also grow in the segment of online supermarkets that do not have any stationary stores like **Frisco.pl** belonging to Eurocash group – the largest wholesale FMCG distributor (28 % share) in Poland.

In Poland, for several years there has been a growing interest in purchasing food directly from farmers, and initiatives that shorten the food supply chains gain more and more popularity. Polish consumers are very concerned with the origin of food and prefer products sourced locally.

In Poland, there are few marketplaces dedicated to selling organic food. One of the longest operating is the Warsaw **Biobazar**. Usually, smaller producers sell their products at local markets. Direct sales via the Internet are also developing. The initiatives of organizing sales or creating purchasing groups are supported by agricultural advisory centers. The development of direct sales and the shortening of supply chains is one of the top priorities of the national agri-food policy.

Intra EU Trade of Organic Products

The data on intra-EU trade of organic products is not available in Poland as there is no differentiation between organic and conventional items in the national foreign trade statistics. Poland is considered as an important supplier in terms of volume and value of organic cereals and fruit (apples and soft fruit) in the EU. Other products categories and particularly processed organic food are of low relevance.

Organic Food Consumers

The share of consumers who regularly buy organic food is steadily growing. In a survey conducted in 2019 41 % consumers declared to buy organic food at least once a week. Polish consumers are motivated to buy organic food by health concern as well as belief that organic food is safe and free from pesticide residues. More often organic food is bought by women, consumers aged 36–45 and families with children.

Organic fruit, vegetables and eggs are the top three most often bought products categories. More than a quarter of consumers declared to buy organic fruit and vegetables “at least once a week” and 63 % regularly purchase organic eggs. Dairy, processed meat and bakery products are regularly purchased by more than 1/3 of organic consumers. Less frequently consumers buy organic snacks, herbs, spices, tea and coffee, nuts and dried fruit as well as semi-finished products and ready meals.

Price remains the main barrier to buy organic food. However, consumers are willing to spend more on organic fruit and vegetables (69 %), eggs (54 %), meat (49 %) and dairy (45 %).⁴³

The COVID-19 pandemic boosted demand for organic food in Poland. Almost 1/5 of consumers declared that they bought more organic food due to pandemic.⁴⁴

According to Euromonitor as organic products are generally more expensive than standard alternatives and consumers' incomes come under pressure it is likely that many consumers will be forced to reconsider their spending decisions. It is expected that the average unit price of organic packaged food will remain stable in the near future.⁴⁵

Info

Frisco.pl

<https://www.frisco.pl/>

Biobazar

<https://biobazar.org.pl/>

42 see <https://jemyeko.com/organic-farming-and-its-market-in-poland-from-the-perspective-of-2020-current-status-and-prospects/>

43 Trendy w ekozakupach Polaków 2020. Raport Farmy Świętokrzyskiej, 2020.

44 ibidem

45 see <https://www.euromonitor.com/organic-packaged-food-in-poland/report#>

Import and Export of Organic Products

While the imports⁴⁶ of organic products to the EU market slightly decreased in 2020, in Poland there is reversed trend observed. In 2020, Poland imported 36.077 tonnes of organic agri-food products. This represents a 23,2 % increase compared to 2019 where the volume of import reached 29.285 tonnes.

Key Imported Organic Agri-Food Products

In 2020 – as in the previous year – commodities⁴⁷ represented 54 % of all imports from third countries. The key product categories were cereals, oilseeds, and products of the milling industry.

The share of category “other primary” products⁴⁸ increased to 41 %, while the import of processed products including wine and beverages decreased respectively by 32,8 % and 27,2 %. Under the category “other primary” main products categories imported to Poland included fruit, citrus & tropical fruit, fresh or dried.

The highest growth in terms of import volumes was observed in case of food preparations including product categories, such as infant food, confectionary, and pasta.

There was also a slight decrease in the import of non-edible products including plants and essential oils.⁴⁹

46 import and export to third countries

47 “Commodities” includes, among others: cereals, vegetable oils and oilseeds, sugars, milk powders and butter, unroasted coffee & cocoa

48 “Other primary” includes meat products, F&V, milk, yoghurt and honey products

49 „Non edible” covers plants and essential oils

Table 17: Total organic agri-food import volumes by product category (2019 & 2020/tonnes)

Product category	2019	2020	Change/% 2019–2020
Commodities	15 686	19 460	24.1
Other primary	11 344	14 718	29.7
Processed products incl. wine	1 580	1 062	-32.8
Food preparations (infant food, confectionery and pasta)	199	428	115.1
Non edible	282	265	-6.0
Fish and other non agri	4	5	25.0
Beverages	191	139	-27.2
Total	29 286	36 077	23.2

Origin of Organic Imports

The main trading partners in 2020 were Ukraine (37 %), Kazakhstan (22 %) and Ecuador (15 %), covering 83 % of the organic agri-food import volume.

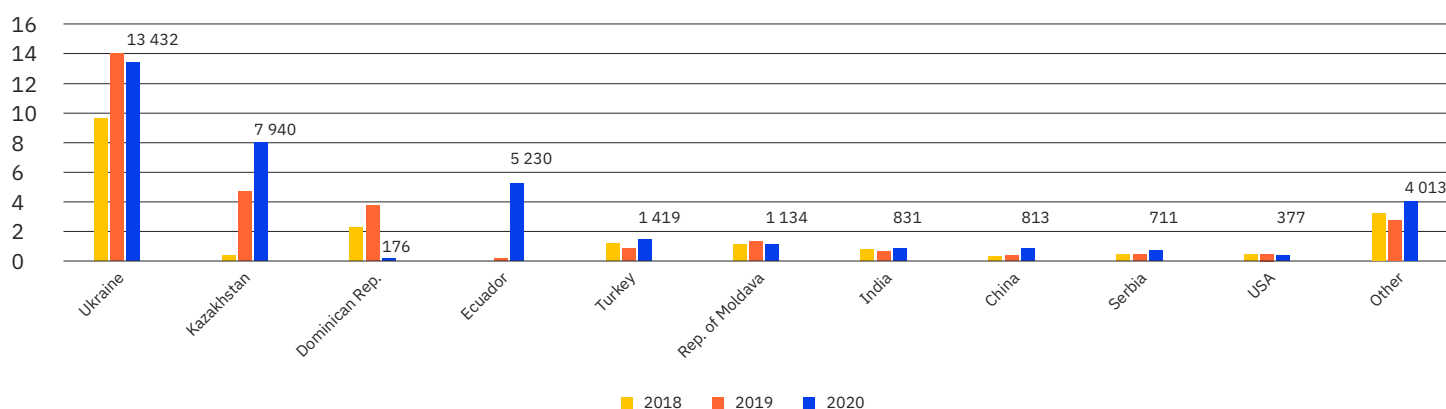
Ten countries exporting organic products to Poland represented 89 % of total imports in 2020. The export to Poland from these ten countries increased by 20.44 % in 2020, while exports from the remaining exporters (other) increased by 50.72 %. Also, the total number of export countries increased to 43 compared to 40 a year ago.

Main imported products from Ukraine are cereals, products of the milling industry and frozen fruits. Oil-seeds, (linseed) are primarily imported from Kazakhstan. There was observed a 67 % increase in the import of oil-seeds from Kazakhstan in 2020 compared to 2019. Ecuador became in 2020 a main supplier of organic bananas to Polish market replacing Dominican Republic.

Organic Exports

In Poland there is no available statistics on export of organic commodities. As the domestic organic food market is still immature, a significant share of domestic organic production is traded abroad within the intra EU-trade. There have been some attempts made to enter third country markets, but the organic export remains insignificant. According to **Bio Planet** (the main distributor of organic products) in Poland only 3 % of their turnover is generated by export sales.

Table 18: The main trading partners (2018–2020/tonnes)



Outlook

Poland has opportunities to develop organic farming or organic farming due to the natural conditions and high production potential of the agri-food sector. Despite financial support, the number of organic farms and the area of organic farming has been decreasing for several years. There are many reasons for this, including institutional as well as related to the organization of supply chains and the development of organic food market.

The barriers to the growth of organic farming in Poland include the lack of political involvement in organic farming, the lack of strong organizations representing the political and economic interests of entities operating in the organic food and farming system, the reluctance of farmers to cooperate, as well as excessive bureaucratic burdens discouraging them from entering the organic sector.⁵⁰ Lack of economies of scale, inefficient supply chain and spatially dispersed location of producers result in outflow of organic products to the conventional market. A weakness in the development of organic farming is also the transfer of knowledge, including the lack of a sufficient number of advisers specializing in organic farming.

In addition, industry experts indicate an unfavorable production structure on organic farms, including a low share of farms having livestock, which adversely affects the sustainability of production.

The challenges identified by experts contributing to “Organic Food Market in Poland Report 2021” include reaching a critical mass to further develop organic sales, building consumers’ awareness of organic food, improving access to organic raw material and ingredients, shortening supply chains, reducing production costs and the use of plastic in organic food packaging.

The observed decrease in the number of producers operating in the organic farming system indicate the need to review the effectiveness of the existing support measures and to identify the priority areas to boost organic production and organic food market. In the Framework Action Plan for Organic Food and Farming in Poland 2021–2027 the key issues identified as essential to progress the sector are: (1) improvement of knowledge transfer, (2) fostering innovations in organic production, (3) support for organic producers and (4) maintaining confidence in the organic farming system.⁵¹ There are several measures proposed to counteract the decreasing number of organic farms and area under organic production, but specific targets and indicators are not set. Furthermore, the action plan does not take into account the disparities in development organic farming between the regions, which seems crucial to ensure the sustainable development of organic farming and organic food market.

50 see <https://jemyeko.com/organic-farming-and-its-market-in-poland-from-the-perspective-of-2020-current-status-and-prospects/>

51 see <https://www.gov.pl/web/rolnictwo/ramowy-plan-dzialan-dla-ywnosci-i-rolnictwa-ekologicznego-w-polsce>

References

Figures

1	Map of Poland with administrative units (voivodships)	3
2	Organic apple orchard in Łódzkie voivodship	12
3	Organic farm with laying hens	13
4	Debate on organic food market organized by The Polish Chamber of Organic Food in 2020	16
5	Stand of the Association of the Polish Organic Fruit Growers in Łódzkie voivodship	17
6	Stand at Vegetable processing company Charsznickie Pola Natury at Organic Trade Fair BIOEXPO 2021, fot. Karol Przybylak	18
7	Offer of organic farm Farma Świętokrzyska at BIOEXPO Organic Trade Fair 2020	18
8	The offer of products under private BIO label at Carrefour hypermarket in Warsaw	23
9	The offer of fruit and vegetables at Carrefour hypermarket in Warsaw	23
10	The offer of fresh vegetables at Lidl stand during organic trade fair BIOEXPO 2021	24

Tables

1	The structure of sowing area (2020), source: https://stat.gov.pl/en/topics/agriculture-forestry/agriculture/agriculture-in-2020,4,17.html	6
2	Output value of the agricultural industry at current prices (2020), source: https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=aact_eaa01&lang=en	7
3	The number of organic farms (2004–2020), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	10
4	The area under organic production (2004–2020 / ha), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	10
5	The size structure of organic farms (2020), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	10
6	Number of organic farms and area under organic production by macroregion and voivodship (2020), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	11
7	The structure of the area under organic farming (2017–2020/%), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	11
8	Area of main organic crops (after conversion period) (2017–2020/ha), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	12
9	The share of area under main organic crops (2020), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	12
10	Estimated production volume of selected organic crops (after conversion period) (2017–2020/tonnes), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	13
11	Number of livestock (heads), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	13
12	List of control bodies and the scope of their authorization (2021), source: https://www.gov.pl/web/rolnictwo/jednostki-certyfikujace	15
13	Organic farming support measures (2021), source: https://www.gov.pl/web/arimr/stawki-platnosci9	19
14	The number of entities dealing with preparation of organic products (2004–2020), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	20
15	Share of organic processors by product category (2020), source based on data AFQI, https://www.gov.pl/web/ijhars/rolnictwo-ekologiczne	20
16	Value share of selected product categories in the organic food market (2019), source: https://inozc.sggw.edu.pl/wp-content/uploads/sites/8/2021/06/Raport_MRiRW_pdf_2019_Institut.pdf	22
17	Total organic agri-food import volumes by product category (2019 & 2020/tonnes), source: Traces: https://ec.europa.eu/food/animals/traces_en	26
18	The main trading partners (2018–2020/tonnes), source: Traces: https://ec.europa.eu/food/animals/traces_en	27

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