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STUDY

Current State, Plans and Needs of Ukrainian Organic Exporters

January 2025

UKRAINE

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This publication provides an overview of the current state, plans, tasks, and problems of organic exporters in Ukraine as of December 2024 – January 2025 with the aim to further plan a strategy to support exporters in their activities.

The study of the current state, plans and needs of Ukrainian organic exporters by Organic Initiative Public Association is distributed free of charge and can be downloaded from the Organic Initiative's website www.organicinitiative.org.ua or from information portal www.organicinfo.ua.

The study of the current state, plans and needs of Ukrainian organic exporters was conducted in December 2024 – January 2025 by Organic Initiative Public Association (Ukraine) in cooperation with the MZ HUB research agency with the support of Switzerland within the framework of the Swiss-Ukrainian Programme "Higher Value Added Trade from the Organic and Dairy Sector in Ukraine" (QFTP) implemented by the Research Institute of Organic Agriculture (FiBL, Switzerland) in partnership with SAFOSO AG (Switzerland), and the Swiss Import Promotion Programme (SIPPO) implemented by Swisscontact.

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KYIV, 2025

STUDY OF CURRENT STATE, PLANS AND NEEDS OF UKRAINIAN ORGANIC EXPORTERS

Aim

The aim of this study is to explore the current state, plans, tasks, and problems of organic exporters for the purpose of further planning and developing a strategy to support these exporters in their activities

Objectives

- To explore the companies' current status of exports: directions and types of exported products, supply chains, etc
- To assess their plans for entering new markets: what new markets and with which specific products the Ukrainian organic exporters plan to enter new markets
- To find out which technical needs are relevant for the companies
- To learn the results of companies' participation in international trade fairs in the previous season and their future plans
- To explore the challenges and problems that hinder companies' development and exports
- To learn which export trends the exporters see in 2024
- To create a database of contacts for organic exporters for further involvement in support projects

Methodology

The questionnaire was posted on Lemur online survey platform

Respondents

To collect the data, 91 organic exporters from Ukraine were interviewed (out of a total of approximately 150 organic exporters from Ukraine)

CONTENTS

Section 1.
CURRENT STATE OF EXPORTS

1.1. What products and where Ukrainian organic producers export

The largest share of surveyed companies exported berries, in particular blueberries. The second most exported crop is soybeans, which is exported by 14% of the surveyed companies, and every 10th company exported wheat and/or other cereals.

Table 1.1.:
Crops exported by organic producers in 2024 (% of companies, n=91)

27%	Berries (not specified, excl. blueberries)
19%	Frozen blueberries
14%	Soybeans
11%	Other cereals (oats, hulled millet, millet)
10%	Medicinal herbs
10%	Wheat (spelt)
8%	Corn
7%	Rapeseeds
6%	Sunflower cake
6%	Sunflower oil
4%	Honey
4%	Flax
3%	Apple juice concentrated
3%	Groats
2%	Sunflower seeds
2%	Nuts
2%	Barley
1%	Milk
1%	Confectionary products
18%	Other*

*Mentioned only once: sunflower phosphatide concentrate, red beans, ice cream, coriander, birch sap, essential and vegetable oils, birch buds, frozen fish, mushrooms, hemp, flour, lentils, rosehip oil, milk thistle oil, flaxseed oil

The key market to which the surveyed Ukrainian organic producers export is Germany (62% of exporters), followed by Poland (48%), and the third group includes the Netherlands, Italy, the Czech Republic, and France.

Table 1.2.:
Countries where organic products were exported in 2024 (% of companies, n=91)

1.	**Germany**	**62%**
2.	**Poland**	**48%**
3.	**Netherlands**	**33%**
4.	**Italy**	**31%**
5.	**Czech Republic**	**30%**
6.	**Austria**	**26%**
7.	**France**	**21%**
8.	**Switzerland**	**17%**
9.	**Belgium**	**14%**
10.	**Moldova**	**13%**
11.	United Kingdom	11%
12.	USA	9%
13.	Denmark	8%
14.	Lithuania	8%
15.	Canada	7%
16.	Israel	7%
17.	Romania	4%
18.	Sweden	3%
19.	Latvia	3%
20.	Spain	2%
21.	Hungary	2%
22.	Other countries*	7%
23.	Refused to answer	2%

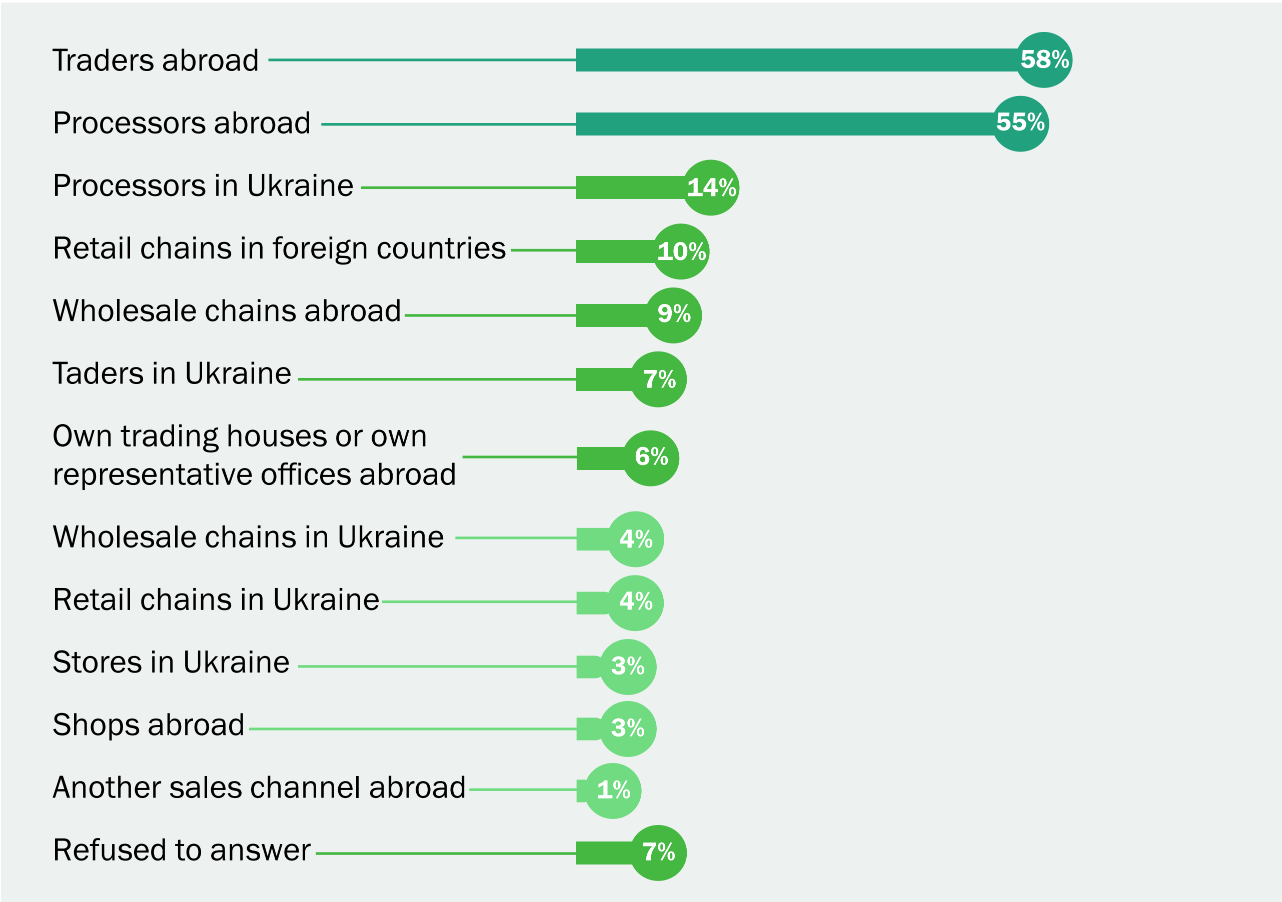
*Mentioned only once: Slovakia, Serbia, Poland, Norway, Bulgaria

1.2. A typical supply chain of Ukrainian organic exporters in 2024

Currently, foreign traders and processors are the key buyers of Ukrainian organic products.

Only 1 in 10 exporters work directly with retail and/or wholesale chains abroad, and only a few work directly with stores abroad.

Table 1.3.:
Types of buyers of Ukrainian organic products in 2024
(% of companies, n=91)



Describing the trends in exports in 2024, almost half of organic exporters (45%) primarily note the growth in demand for organic products. In general, among these trends, an increase in demand for organic products is often noted, and the comments of the surveyed export specialists indicate that Ukrainian organic exporters experienced a steady increase in demand for their products in 2024. At the same time, such trends as an increase in demand for organic products produced in Ukraine and an increase in demand for niche crops were also mentioned.

Only one company noted a downward trend in demand for Ukrainian organic products, which means that there is no such strongly pronounced trend. In general, only in one comment a decline in demand was mentioned, citing a decrease in consumer purchasing power as the reason, and another expert noted that it had become more difficult to find a buyer and to export. This indicates that Ukrainian exporters do not see a downward trend in demand for organic products in general and Ukrainian products in particular.

The second most important trend mentioned (which may be due to the first one) is related to the need of or requirements for high quality of exported products (28%).

Table 1.4.:
Trends on the foreign market of organic products in 2024
(% of companies, n=29 of those who answered the question)

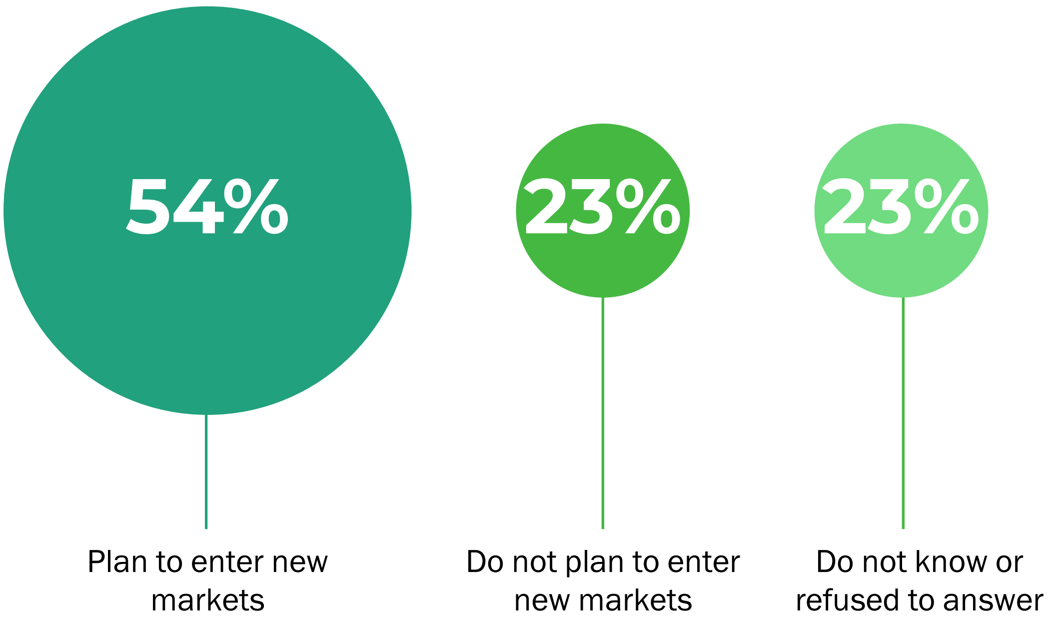
45%	Increased demand
28%	Requirement to ensure high quality of products
10%	Interest in Ukrainian brands and products
10%	Packaging complying with environmental requirements
7%	Decrease in demand
3%	High competition
3%	Expanding the range of products
3%	Economic instability
3%	Growing demand for protein products
3%	Interest in niche cereals
3%	Price reduction

Section 2.
PLANS TO ENTER NEW MARKETS

2.1. New countries organic exporters plan to enter in 2025

In general, more than half (54%) of the surveyed organic exporters express their intention to enter new markets.

Table 2.1.:
Intentions to enter new markets in 2025 (% of companies, n=91)



France, the USA, Switzerland and Canada are the leaders among the countries where companies plan to enter. It is worth noting that the vast majority of the top 10 countries named by exporters as export expansion destinations are the European countries (7 out of 10), most of them being the EU members (5 out of 7).

In general, out of the more than 25 countries mentioned, 13 countries (50%) are the European countries and 2 are the countries of North America (USA and Canada).

Table 2.2.:

Countries of export expansion in 2025

(% of companies, n=49, those planning to enter new markets)

1.	**France**	**16%**
2.	**USA**	**16%**
3.	**Switzerland**	**12%**
4.	**Canada**	**12%**
5.	**United Kingdom**	**11%**
6.	**Netherlands**	**10%**
7.	**Germany**	**9%**
8.	**Italy**	**8%**
9.	**Austria**	**7%**
10.	**Israel**	**5%**
11.	Belgium	4%
12.	Lithuania	4%
13.	Czech Republic	3%
14.	Poland	3%
15.	Japan	3%
16.	Moldova	2%
17.	UAE	2%
18.	China	2%
19.	Romania	1%
20.	Other countries*	10%
21.	Refused to answer	4%

If we assume that the companies will continue to export to the markets where they are already present and expand their export activities in 2025, the markets of Germany, Poland, and the Netherlands will remain a priority, while Italy, France, the Czech Republic, and Austria will become more important for Ukrainian organic exports.

*Mentioned once: Armenia, Georgia, Kazakhstan, Saudi Arabia, South Africa, Hungary, and Turkey

It is worth noting the growing interest of exporters in the markets of Switzerland, the USA and Canada in 2025, as, according to this study, more companies expressed their intention to export to these markets than operated on these markets in 2024 (Switzerland in 2024 — 17% of companies, plans for 2025 — +12%, the USA in 2024 — 9% of companies, plans for 2025 — +16%, Canada in 2024 — 7% of companies, plans for 2025 — +12%).

Table 2.3.:
Countries of current exports and export expansion in 2025
(% of companies, n=91)

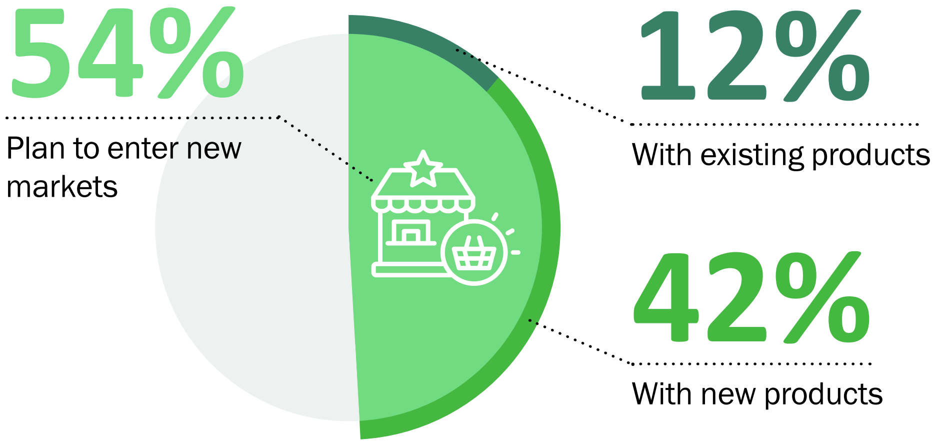
	Name of the country	Already present on the market	Plan to enter the market (% of all surveyed companies)	Forecast of the number of companies on the markets of the countries for 2025 (companies already operating on the market + companies planning to enter the market (%)
1	Germany	62%	9%	71%
2	Poland	48%	3%	51%
3	Netherlands	33%	10%	43%
4	Italy	31%	8%	39%
5	France	21%	16%	37%
6	Czech Republic	30%	3%	33%
7	Austria	26%	7%	33%
8	Switzerland	17%	12%	29%
9	USA	9%	16%	25%
10	United Kingdom	11%	11%	22%
11	Canada	7%	12%	19%
12	Belgium	14%	4%	18%
13	Moldova	13%	2%	15%
14	Israel	7%	5%	12%
15	Lithuania	8%	4%	12%
16	Denmark	8%	0%	8%
17	Romania	4%	1%	5%
18	Japan	0%	3%	3%
19	Latvia	3%	0%	3%
20	Sweden	3%	0%	3%
21	Hungary	2%	1%	3%
22	UAE	0%	2%	2%
23	China	0%	2%	2%
24	Spain	2%	0%	2%
25	Other countries*	0%	10%	10%

*Mentioned once: Armenia, Georgia, Kazakhstan, Saudi Arabia, South Africa, Hungary, and Turkey

2.2. Products with which exporters plan to enter new markets

More than half of the respondents (54%) expressed their intention to enter new markets. Only 12% of all the surveyed exporters plan to enter new markets with a new type of product. This indicates that, in general, exporters are not changing their export strategy but rather seeking to increase sales of existing products on the new markets.

Diagram 2.1.:
Plans to enter new markets in 2025 with new or existing products
(% of companies, n=91)



New types of products with which exporters plan to enter new markets:

- Yoghurt and butter
- Sunflower oil
- Oil cake
- Soybeans for use as food
- Milk thistle
- Rosehip
- Rapeseed
- Flax
- Sour cherry
- Flour (not specified)
- Hulled millet (including steamed)
- Amaranth
- Medicinal herbs
- Fresh fruit and vegetables (not specified)
- Processed products (not specified)

Thus, it can be assumed that the products to be introduced on the new markets cover all key types: raw materials, wild collected plants, finished products, and value added products.

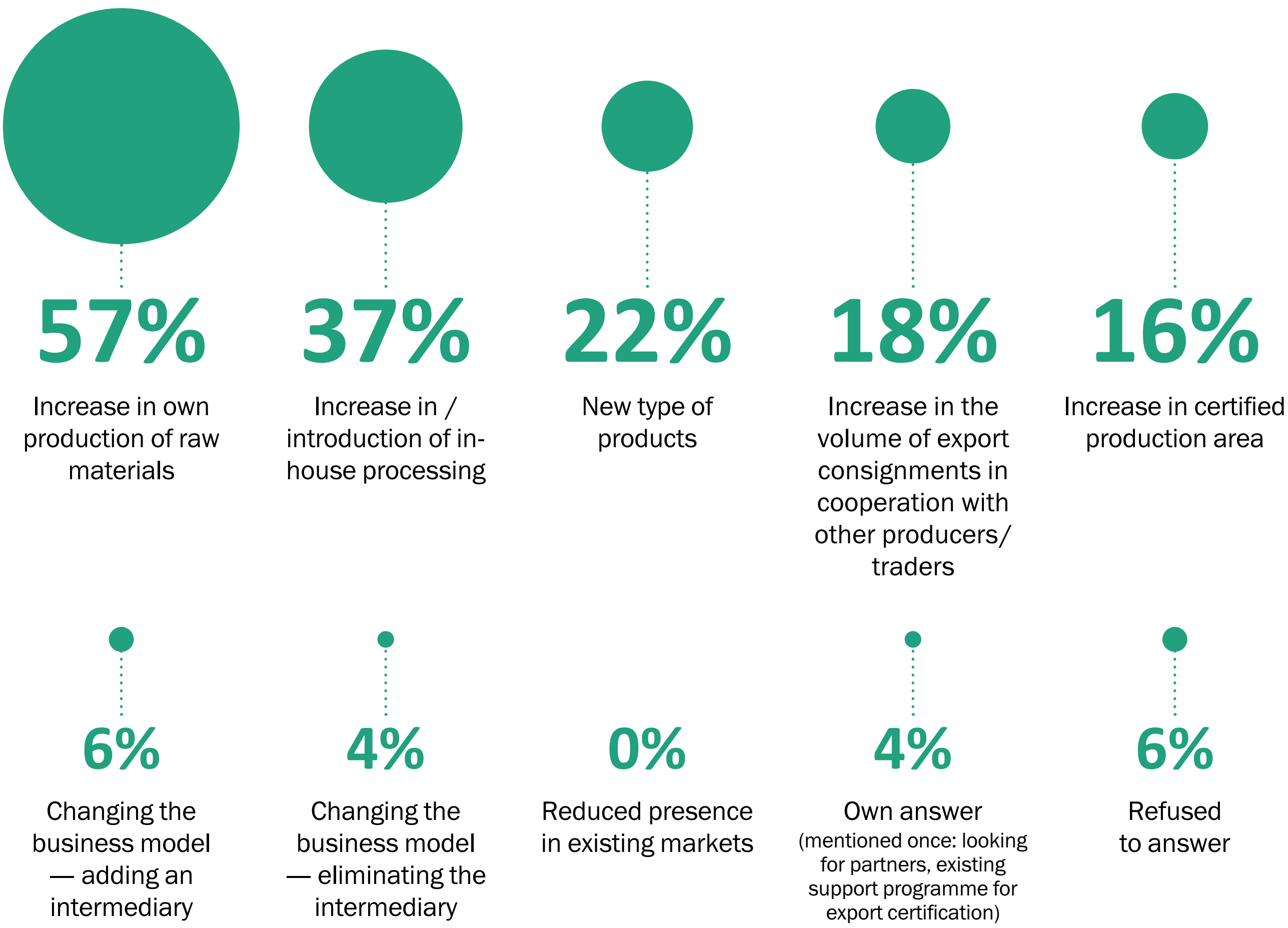
Section 3.

COMPANIES' GOALS ON THE NEW MARKETS AND FACTORS INFLUENCING THEIR ENTRY TO THE NEW MARKETS

The main factors that allow a number of companies to plan to expand their export markets include the readiness and/or intention to increase production volumes (57%) followed by the development of in-house processing (37%). New products come in third (22%) along with increased cooperation with other producers or traders (18%) and an increase in certified areas (16%).

It is important to note that none of these companies plan to leave the markets where they are currently present.

Diagram 3.1.:
Factors that influence the organic exporters' decision to enter new markets
(% of companies, n=49, those who plan to enter new markets)



The main goal for the companies planning to expand their sales markets by entering new markets is to increase exports of existing products (almost 90%).

It is also important to note that for almost half of the companies expanding markets is also a way to find a market to sell their products at a higher price than before (this goal was mentioned by almost half of the respondents (45%)) and to strengthen the brand position abroad (45%). Expanding sales markets for diversification is much less common, as is launching new products only for these markets.

Diagram 3.2.:

Companies' goals on the new markets (% of companies, n=49, those planning to enter new markets)

Section 4.

PROBLEMS AND CHALLENGES FACED BY EXPORTERS AND SUGGESTIONS FOR THEIR SOLUTION

The fact that logistics is also a major problem is complicated logistics due to the obstacles created at the Polish border (60%). The fact that logistics is also a major problem is confirmed by the fact that 31% of respondents who mentioned complicated logistics due to the consequences of the war, and logistics was named as the No. 1 challenge when exporters answered the question about the challenges they see in connection with entering new markets (almost 30% of surveyed exporters entering new markets).

The second most important problem is the shortage of raw materials at an affordable price (32%).

The next most common problems include customs procedures that complicate exports (32%) and high competition on sales markets (29%).

Less common obstacles include requirements for products in general: lack of suitable laboratories (27%), shortage of suppliers (21%), and inability to provide the volumes required by the partner (20%).

Only 18% of respondents mentioned the problem of prices, namely that product prices do not correspond to market prices.

Quality assurance and certification are the least problematic issues.

Diagram 4.1.:
Three key concerns of exporters

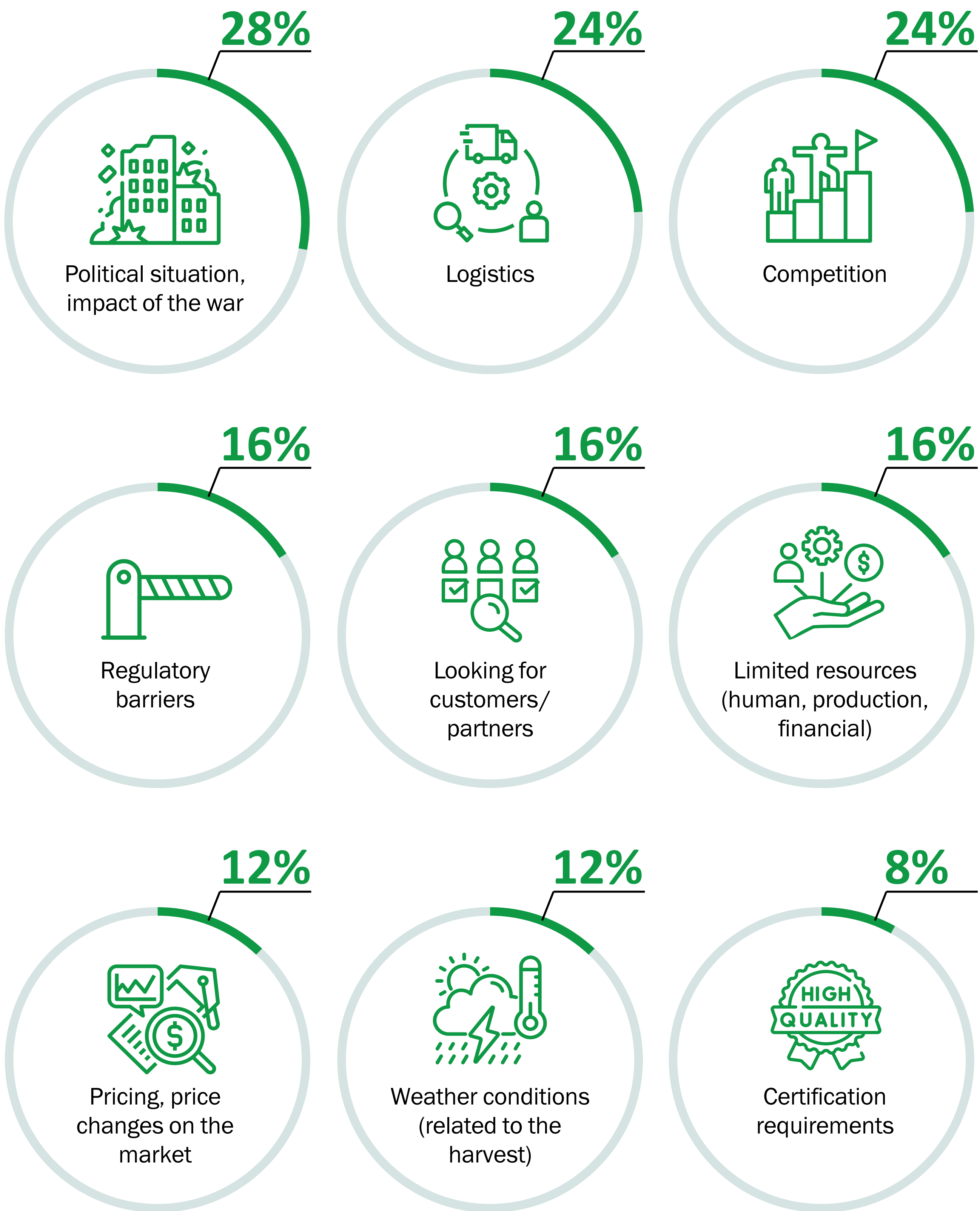
Table 4.1.:
Problems faced by exporters (% of companies, n=91)

The organic exporters that plan to expand their sales markets also most often mention the impact of the war, logistical difficulties, and high competition on the new markets.

The other, less important, issues include pricing issues (both on the market and in terms of production or logistics costs), regulatory barriers (both in Ukraine and in the destination country), difficulties in finding partners, general production constraints (human, financial, production capacity), and unpredictability/dependence on weather conditions.

Diagram 4.2.:

Challenges that exporters see in entering new markets (% of companies, n=25, those who plan to enter new markets and answered the question)



Section 5.

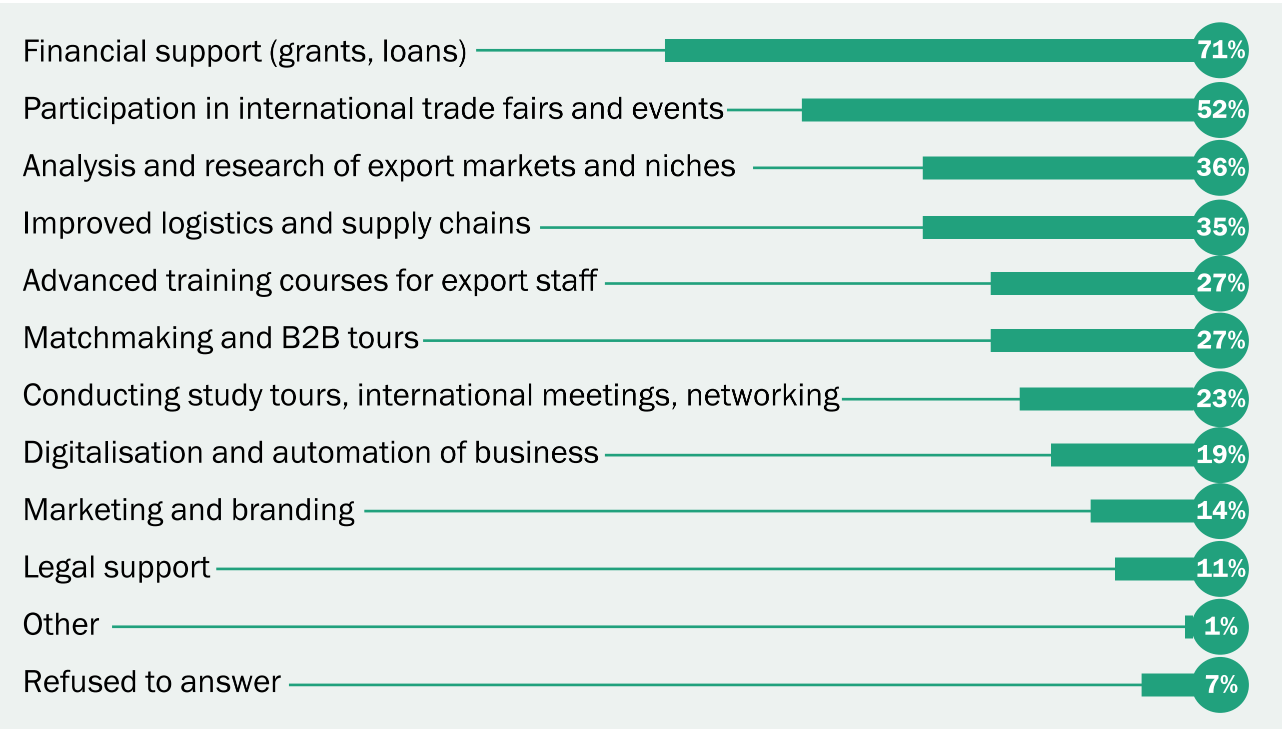
COMPANIES’ NEEDS FOR SUCCESSFUL EXPORT ACTIVITIES

Companies are most likely to state their need for additional funding (loans and grants). In the second place there is a need for support in participating in international trade fairs (mentioned by half of the respondents, 52%). In general, the survey shows a high demand for support in the form of events, tours and networking to find partners for export. In addition to the mentioned needs for support in participation in international trade fairs, the following needs were also mentioned: 27% confirmed the need for organising matchmaking and B2B tours, 23% — the need for study tours, international meetings, and networking.

More than a third of companies (36%) need support with analysis and research of export markets and niches. More than a third (35%) need the improvement of logistics and supply chains. Almost a third of the total number of surveyed exporters (27%) mentioned the need for advanced training courses for export staff.

Among the proposed areas of support, the respondents are least interested in legal support, assistance with branding and marketing, as well as digitalisation/automation of business processes.

Diagram 5.2.:
Expectations regarding the areas where support of export activities is needed (% of companies, n=91)



Section 6.

PARTICIPATION IN INTERNATIONAL TRADE FAIRS

Some 61% of the surveyed companies were not exhibitors or did not attend trade fairs in 2024. The international trade fair BIOFACH, Nuremberg, Germany, is the leader among the trade fairs visited.

Diagram 6.1.:
Participation in international trade fairs as exhibitors in 2024
(% of companies, n=91)

38%
Participated in international trade fairs as an exhibitor

27%
Did not participate as an exhibitor, only as a visitor

34%
Did not attend any trade fairs at all in 2024

Diagram 6.2:
International trade fairs the companies participated in as exhibitors in 2024
(% of companies, n=35, participated in international trade fairs as exhibitors)

86%
BIOFACH into organic

37%
SIAL INSPIRE FOOD BUSINESS

11%
FRUIT LOGISTICA

8%
Gulfood

Almost all of the surveyed exhibitors, with the exception of one (34 out of 35 exhibitors), are fully satisfied with their participation in trade fairs.

The desire to participate in the trade fairs next year is declared by 58% of the surveyed companies, with BIOFACH still being the leading trade fair, but other trade fairs are also of interest to at least one in five companies.

Diagram 6.3.:
Desire to participate in international trade fairs as exhibitors in 2025-2026
(% of companies, n=91)

Section 7.

CONCLUSIONS AND RECOMMENDATIONS

7.1. Key conclusions of the study

Export trends

According to this survey, the top 10 countries that import organic products from Ukraine by the number of exporters to these countries in 2024 include:

This list is 90% similar to the list of Top 10 countries in the world importing organic products from Ukraine in 2023 according to the study "Organic Market Study of Ukraine (2023)" (according to the organic exporters interviewed, Israel was not included in the Top 10 in 2024, instead Belgium was included).

In 2024, **the typical supply chain used by Ukrainian organic exporters** was mainly selling to traders and processors abroad (58% and 55% respectively).

The main export destination is Europe, and Germany is the key market to which the surveyed Ukrainian organic producers export their products (62% of exporters), followed by Poland (48%), and the third group includes the Netherlands, Italy, the Czech Republic, and France.

Describing **the export trends in 2024**, almost half of organic exporters (45%) primarily noted the growing demand for organic products. The second most important trend mentioned (which may be due to the first one) is related to the need of or requirements for high quality of exported products (28%). In general, the comments of the surveyed experts on this issue indicate that Ukrainian organic exporters experienced a steady increase in demand for organic products in general in 2024. In addition, they noted such trends as an increase in demand for organic products produced in Ukraine and an increase in demand for niche crops.

Intentions to enter new markets and export new products

Overall, more than half (54%) of the surveyed organic exporters express their intention to enter **new markets**. The top countries which the exporters plant to enter are primarily the European countries (France, Switzerland, the UK, the Netherlands), as well as the USA and Canada.

Almost 90% of the companies that declare their intention to enter new markets are going to do so with existing products. Only a small share (12%) of all surveyed exporters plan to enter new markets with a new type of products.

The new products to be launched on the new markets cover all key types: raw materials, wild collected plants, finished products, and value added products.

The exporters mentioned the following new types of products with which they plan to enter new markets:

- Yoghurt and butter
- Sunflower oil
- Oil cake
- Soybeans for use as food
- Milk thistle
- Rosehip
- Rapeseed
- Flax
- Sour cherry
- Flour (not specified)
- Hulled millet (including steamed)
- Amaranth
- Medicinal herbs
- Fresh fruit and vegetables (not specified)
- Processed products (not specified)

Factors and goals that influence exports

The main factors that allow a number of companies to plan to expand their export markets include the readiness and/or intention to increase production volumes (57%) followed by the development of in-house processing (37%). New products come in third (22%) along with increased cooperation with other producers or traders (18%) and an increase in certified areas (16%).

The main goal for companies planning to expand their sales markets by entering new markets is to increase exports of existing products (almost 90%). In addition, for almost half of the companies expanding markets is also a way to find a market to sell their products at a higher price than before (this goal was mentioned by almost half of the respondents (45%)) and to strengthen the brand position abroad (45%).

According to these data, it can be argued that, in general, the volume of exported products will increase significantly in 2025, as more than half of respondents (54%) declare entering new markets. However, there will be no dramatic changes in export markets or new products, as 90% of those planning to enter new markets will export existing products rather than produce or process new ones.

The TOP 10 countries that exporters plan to enter in 2025 as new markets is almost identical to the list of TOP 10 destination countries in 2024 (arranged by rating of responses):

Destination counties for organic export in 2024	Countries of export expansion in 2025
Germany	France
Poland	USA
Netherlands	Switzerland
Italy	Canada
Czech Republic	United Kingdom
Austria	Netherlands
France	Germany
Switzerland	Italy
Belgium	Austria
Moldova	Israel

7.2. Recommendations for organisations and programmes that support organic companies and organic exporters in Ukraine

1

This study suggests that organic exports will develop significantly in 2025, with half (54%) of the surveyed organic exporters planning to enter new markets in 2025.

Entering new markets will be done mainly by increasing production volumes of the existing product range rather than by producing new types of products. Only 12% of all surveyed exporters plan to enter new markets by producing new products. This indicates that, in general, exporters do not change their export strategy, but rather seek to increase sales of existing products on the new markets.

Given that the majority of exporters adhere to a conservative strategy, do not update their product line or diversify their product range, while global export standards require innovation, diversification and value addition, it is important to focus support for exporters not only on finding new markets for existing products, but also on stimulating diversification of the product range for export.

Such support could include:

- **training programmes or consulting on new product development,**
- **marketing support for entering new markets with new products,**
- **programmes to promote the development of processing and other types of value addition,**
- **analysis and research into promising market niches that may be attractive for exporting new products.**

Such programmes, which would promote the development of new products and increase added value, could become additional tools to improve the competitiveness of Ukrainian organic exporters.

2

Germany, Poland, the Netherlands, Italy, the Czech Republic and Austria, which are already familiar with Ukrainian organic products, are the priority markets for the development of new ones. Ukrainian organic exporters are also increasingly interested in France, the USA, and Switzerland.

This study also shows the dependence of exporters on individual markets: most exporters are focused on a few major countries (in particular, the EU counties and the USA). 45% of respondents indicated that more than 75% of their exports are to just 2-3 countries. This concentration creates potential risks in the event of changes in trade or other conditions, economic crises or increased competition on these markets, or other factors. Diversification of markets in this situation can also be a factor in strengthening exporters. Therefore, support programmes that will help to diversify the geography of organic exports from Ukraine are needed and may include:

- **analysis of promising markets outside the EU and the USA,**
- **support for the participation of exporters in international trade fairs and missions or other types of programmes and tools for finding partners in other promising countries,**
- **other types of programmes and support that expand the geography of organic exports from Ukraine.**

3

The biggest problem for Ukrainian organic exporters is complicated logistics due to the obstacles at the Polish border (60%). The fact that logistics is a major problem is confirmed by 31% of respondents who mentioned complicated logistics due to the consequences of the war, and logistics was named No. 1 challenge in the answers to the question of what challenges exporters see in connection with entering new markets (almost 30% of surveyed exporters entering new markets). Over a third of respondents (35%) require improvements in logistics and supply chains.

Accordingly, these problems create additional barriers and costs for exporters, jeopardise contract performance, and generally make Ukrainian exporters less competitive on the international markets.

To solve these problems, the following types of support are needed:

- **promoting and advocating for improvements in the border crossing situation at the state level,**
- **to optimise the logistics of organic exporters, technical assistance projects/ programmes, development partners and export support organisations should create such initiatives as export alliances that will allow consolidating supplies and manage logistics processes more efficiently.**

4

The second biggest problem is the shortage of raw materials at an affordable price (32%), and it is therefore important to **help exporters to find and develop partnerships with producers who supply products.**

5

The problem of high competition on sales markets (29%) is one of the main problems mentioned by exporters.

Based on this data, the following can be considered priority areas for supporting organic exporters:

- **strengthening the competitiveness of Ukrainian organic exporters on the foreign markets,**
- **since a significant share of exporters (54% of respondents) plan to enter new markets, support for exporters is needed to strengthen their ability to enter new markets and increase the competitiveness of Ukrainian exporters on the new markets.**

6

The most relevant need of organic exporters is financial support through grants or loans. The second priority is assistance with participation in trade fairs, matchmaking and creating partnerships. It is also important to analyse markets and market niches for selling products — here it is worth concentrating on the most popular markets (those where they already export or plan to export).

Given the needs described above, the priority areas of support should include all possible programmes and activities that facilitate the analysis of new markets and search for export partners:

- **market and market niche analysis,**
- **increasing the visibility of Ukrainian organic exporters on foreign markets, primarily through trade fairs,**
- **other tools for finding partners: matchmaking and B2B tours, study tours, international meetings, networking.**

Supporting the exhibition activities of organic exporters will be very important in 2025. More companies declare their intention to participate in trade fair in 2025 than in 2024, and only 20% do not plan to participate in trade fairs at all and only 22% plan to participate as visitors (in 2024, the number of those who did not participate in trade fairs or attended them only as visitors was higher — 34% and 27%, respectively). BIOFACH (Nuremberg, Germany) will be the leading trade fair in 2025, but other trade fairs are also of interest to at least one in five companies.

7

Almost a third of the surveyed exporters (28%) note a trend towards high product quality and high quality requirements. **It is high product quality, improved product quality, compliance with quality requirements, and increased competitiveness in terms of product quality that Ukrainian exporters should pay attention to, as well as the technical assistance projects/programmes that support organic exporters in Ukraine.**

8

Ukrainian exporters need training programmes: almost a third of the total number of surveyed exporters (27%) confirmed the need for advanced training courses for export staff.

The study findings will form the basis for further support programmes and strategic initiatives aimed at developing organic exports from Ukraine. The Organic Initiative and its partners will continue to work on implementing appropriate solutions in cooperation with international technical assistance programmes/projects, exporters and government agencies. Further details of the plans will be determined in the process of strategic planning.

Annex

INFORMATION ABOUT THE SURVEYED COMPANIES

Table A1:
Location of organic exporters (% of companies, n=91)

Volyn region	14%	Ternopil region	3%
Zhytomyr region	13%	Kharkiv region	3%
Vinnytsia region	10%	Khmelnytskyi region	3%
Kyiv region	9%	Dnipro region	2%
Ivano-Frankivsk region	8%	Odesa region	2%
Kyiv city	8%	Chernivtsi region	2%
Rivne region	8%	Zaporizhzhya region	1%
Lviv region	7%	Kirovohrad region	1%
Poltava region	7%	Mykolaiv region	1%
Cherkasy region	4%	Kherson region	1%
Zakarpattia region	3%		

Table A2:
Certification body of the surveyed companies (% of companies, n=91)

99%	2%	1%
Organic Standard	CONTROLUNION	bio.inspecta

Table A3:
Volume of organic products exported by organic producers in 2024
(% of companies, n=91)

Up to 50 tonnes	14%
50-200 tonnes	19%
200-1,000 tonnes	24%
1,000-50,000 tonnes	18%
More than 50,000 tonnes	2%
Refused to answer	23%

Table A4:
Assessment of pricing in 2024 (% of companies, n=91)

Price in 2024 was better compared to 2023	38%
Price in 2024 was worse compared to 2023	22%
Price has not changed	24%
Refused to answer	15%

Table A5:
Experience of selling organic products as conventional in 2024
(% of companies, n=91)

Have experience in selling organic products as conventional	37%
No experience	53%
Do not know	2%
Refused to answer	8%