POLAND
ORGANIC SECTOR FACTSHEET
PRODUCTION/MARKET TRENDS & POLICIES

KEY INDICATORS

With 554,632 hectares (2022), Poland had the third-largest farmland area under organic management among the EU-13 countries (after Romania and the Czech Republic). However, the share of 3.8% organically managed farmland is the fourth lowest among the EU countries. Growth from 2001-2022 was tenfold and thus considerably above EU growth. Regarding organic retail sales, which were at 310 million euros (data incomplete), they are estimated to constitute 0.6% of all retail sales.

ORGANIC FARMLAND	2001	2022
Area* (Share of Total Farmland)	44,886 ha (0.3%)	554,632 ha (3.8%)
Area Growth from 2001 to 2022	1,135.6%	

ORGANIC LAND USE & AQUACULTURE	2001	2022
Arable Land* (Share of Total)	19,577 ha (0.2%)	431,516 ha (3.9%)
Permanent Crops* (Share of Total)	14,484 ha (0.4%)	27,504 ha (7.9%)
Grassland* (Share of Total)	326,239 ha (22.4%)	90,423 ha (2.8%)
Aquaculture Production (Share of Total)	N/D	888 MT (2%) (2021)

ORGANIC OPERATORS	2001	2022
Producers (Share of Total)	1,787 (0.1%)	21,187 (1.6%)
Aquaculture Producers	N/D	8 (2020)
Processors	15	760
Importers	N/D	314

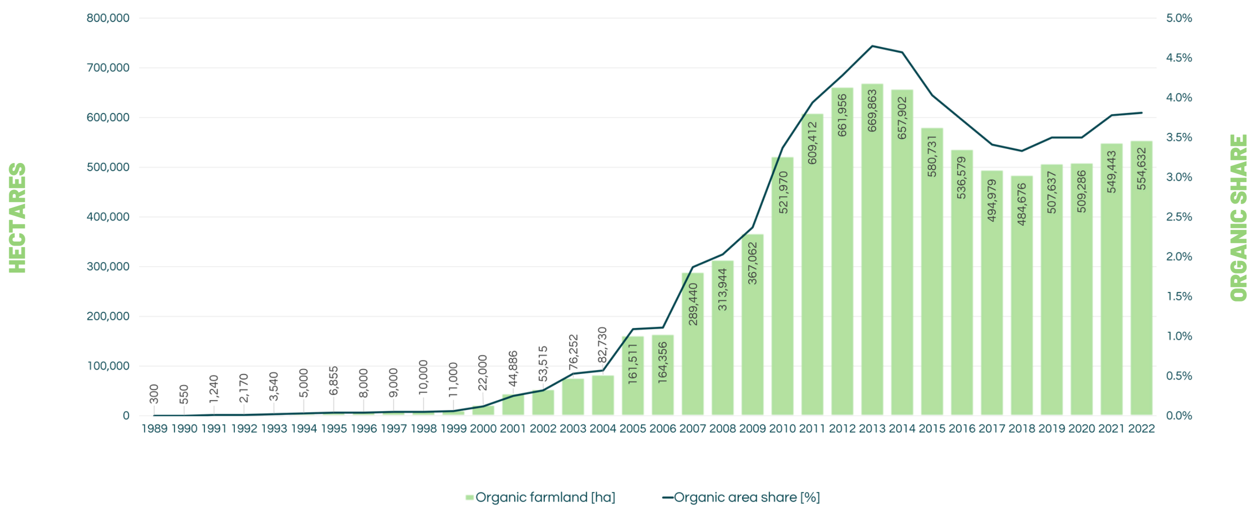
ORGANIC RETAIL SALES	2001	2022
Retail Sales (Share of Total)	N/D	310 M€ (0.6%)
Per Capita Consumption	N/D	8.2 €
Retail Sales Growth from 2001 to 2022	N/D	
Imports	N/D	32,905 MT

Source: FiBL survey based on national data sources, Eurostat and TRACES/European Commission in the framework of the OrganicTargets4EU project

**In conversion and fully organic*

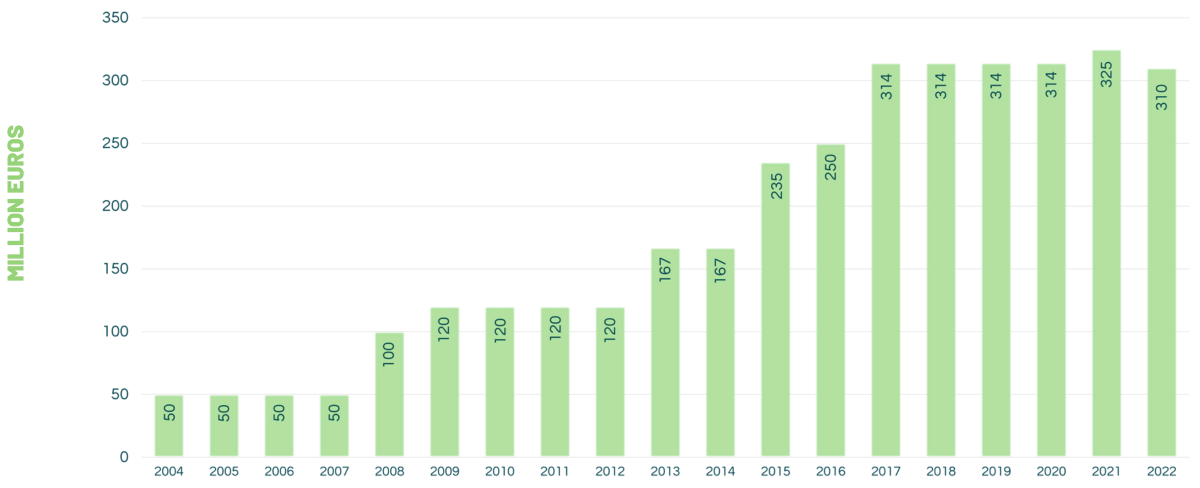
KEY INDICATORS

DEVELOPMENT OF ORGANIC FARMLAND IN POLAND



Source: FiBL-AMI Survey based on Eurostat, Polish Ministry of Agriculture, Nic Lampkin

DEVELOPMENT OF ORGANIC SALES IN POLAND



Source: FiBL-AMI Survey based on Biokurier and further sources

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CAP ORGANIC POLICY SUPPORT

Poland's CAP Strategic Plan foresees a near doubling of the supported organic area, but from a low starting point of 2.4%. Total expenditure on organic support is planned to increase five-fold, to 250 M€ in 2027 due to increased support rates per ha and a greater proportion of land receiving the higher conversion payments, although these have been restricted to vegetables and permanent crops from 2023.

CONVERSION & MAINTENANCE	2018	2027
Land Area Supported (Change from 2018)*	342 kha	659 kha (+93%)
Share of Total Agricultural Area Supported*	2.4%	4.5% (+89%)
Share of Certified Organic Area Supported (Change)*	71%	N/D
Expenditure per Year*	47 M€	250 M€ (+430%)
Expenditure per Hectare Supported*	138 €	380 € (+174%)

SHARE OF CAP RESOURCES	CAP EXP. 2023-2027	ORGANIC SHARE*
Organic Farming Support (P2)*	905 M€	100%
Eco-Schemes (P1)	4,334 M€	15.1%
Agri-Environment, Climate, Welfare (P2)	1,652 M€	
Total CAP Expenditure	24,978 M€	3.6%

**including in-conversion and fully organic land*

CAP ORGANIC CONVERSION AND MAINTENANCE PAYMENTS FOR DIFFERENT LAND USES

INDICATOR	YEAR	FUND	GRASSLAND	ARABLE CROPS	HORTICULTURE	FRUIT CROPS
Conversion Support (€/ha)	2019	P2	125	265	362	438
	2023	P2	229	372	663	681
Change from 2019 to 2023			+83%	+40%	+83%	+25%
Maintenance Support (€/ha)	2019	P2	120	209	297	337
	2023	P2	234	353	534	440
Change from 2019 to 2023			+96%	+68%	+82%	+31%
Conversion Support Higher than Maintenance	2019	P2	+4%	+27%	+22%	+30%
	2023	P1	0%	+5%	+24%	+55%

P1 (Pillar 1) European Agricultural Guarantee Fund (EAGF); P2 (Pillar 2) European Agricultural Fund for Rural Development (EAFRD) and national co-financing

Sources for pages 3 and 4
Lampkin N, Lembo G, Rehburg P (2024) Assessment of agricultural and aquaculture policy responses to the organic F2F targets. OrganicTargets4EU project Deliverable 1.2. Braunschweig: Thünen-Institut.
Lampkin N, Sanders, J (2022) Policy support for organic farming in the European Union 2010-2020. Thünen Working Paper 200. Braunschweig: Thünen-Institut.

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NATIONAL ORGANIC ACTION PLAN

Poland's current organic action plan is its fourth since 2007. No land area or market targets were specified in the current or the previous plan. The 4.5% of UAA supported by 2027 target from the CAP Strategic Plan has been assumed, which is equivalent to almost 6.5% certified organic area based on the share supported in 2018. Actions are primarily focused on supply chain development, knowledge transfer and innovation.

TARGETS

	PERIOD	LAND AREA TARGET*	OTHER TARGETS
Previous Action Plan	2014-20	None	None
Current Action Plan	2021-27	4.5% of UAA by 2027 (CSP)	None

KEY ACTIONS

	PREVIOUS ACTION PLAN (2014 - 2020)	**CURRENT ACTION PLAN** (2021 - 2027)
PRODUCTION	Increase competitiveness, output	Support for producers incl. aquaculture
MARKETS	Support processing investments; support local producer networks; diversify marketing channels; engage local, national authorities in developing sector; develop green procurement; develop robust certification systems; support producer organisations, supply chain development; public procurement esp. In schools; strengthen control system; support certification costs	Priority support for investments; support for producer organisations; co-operation between supply chain actors, local authorities; public procurement, esp. schools; strengthen control system incl. training, information sharing, standardised approaches: support certification costs
INFORMATION	Increase consumer awareness about organic food characteristics, benefits; effective advisory services; network of demonstration farms; strengthen research/advisory links; develop information resources, practical courses; research focused on future changes to regulations	Information, promotion campaigns supported by organic organisations; information portal for consumers; advice, demonstration network, also for aquaculture; specialist regional advisory units; courses in colleges; training, information for new converters; multi-annual research, dissemination programme; research agenda to be agreed with sector; information on alternative marketing channels

AQUACULTURE

The organic share of total aquaculture production in Poland in 2020 was less than 1%. Poland was not included in our analysis of the EMFF (2014-2020) and EMFAF (2021-2027) operational programmes and the Multi-annual National Strategic Plan for Aquaculture. Aquaculture is however referenced in the national organic action plan, in particular with reference to financial and advisory support for aquaculture production. As the funding is project specific and there is no ring-fenced organic budget, statistics on organic aquaculture support expenditure are not available.

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