



20 EUROPEAN 25 ORGANIC CONGRESS

**STRENGTHENING ORGANIC ROOTS FOR
A COMPETITIVE AND SUSTAINABLE 2050**

25-27 JUNE

WARSAW, POLAND

#EUorganic2030

#EOC2025

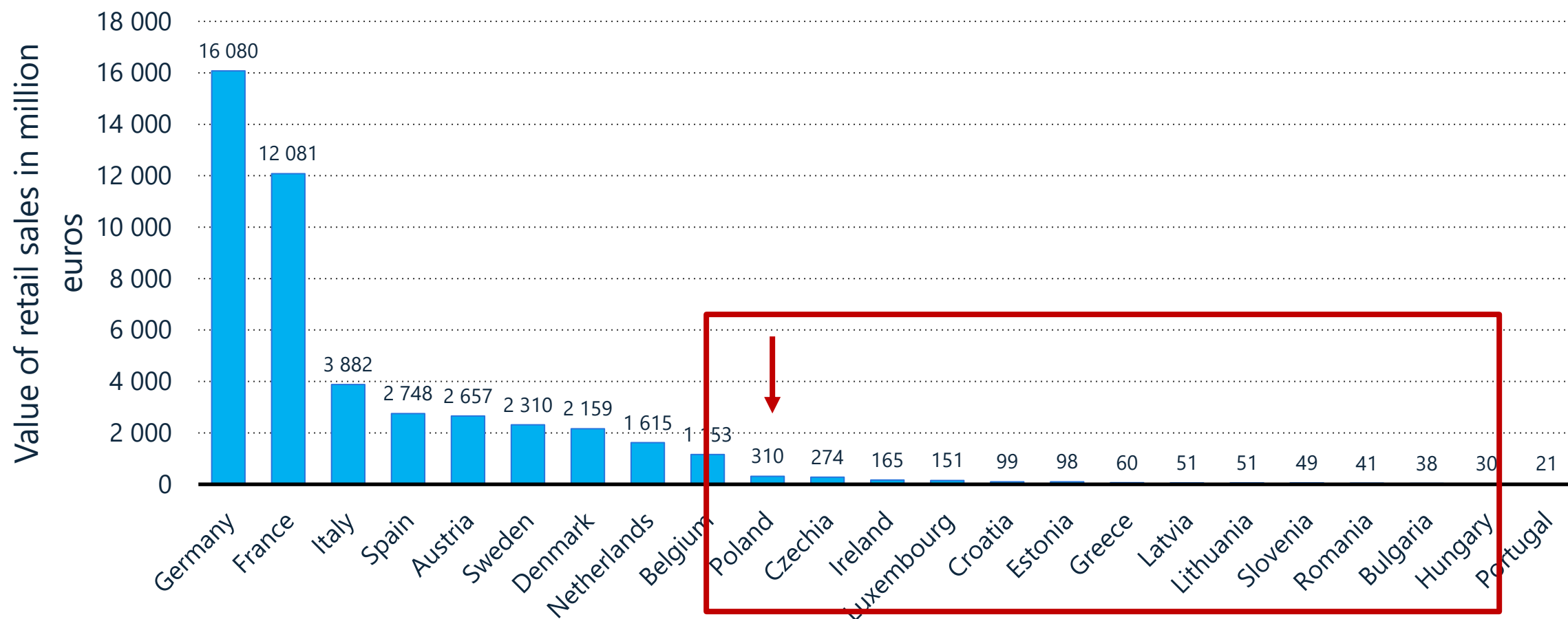


Market review: Organic market trends 2025 Poland

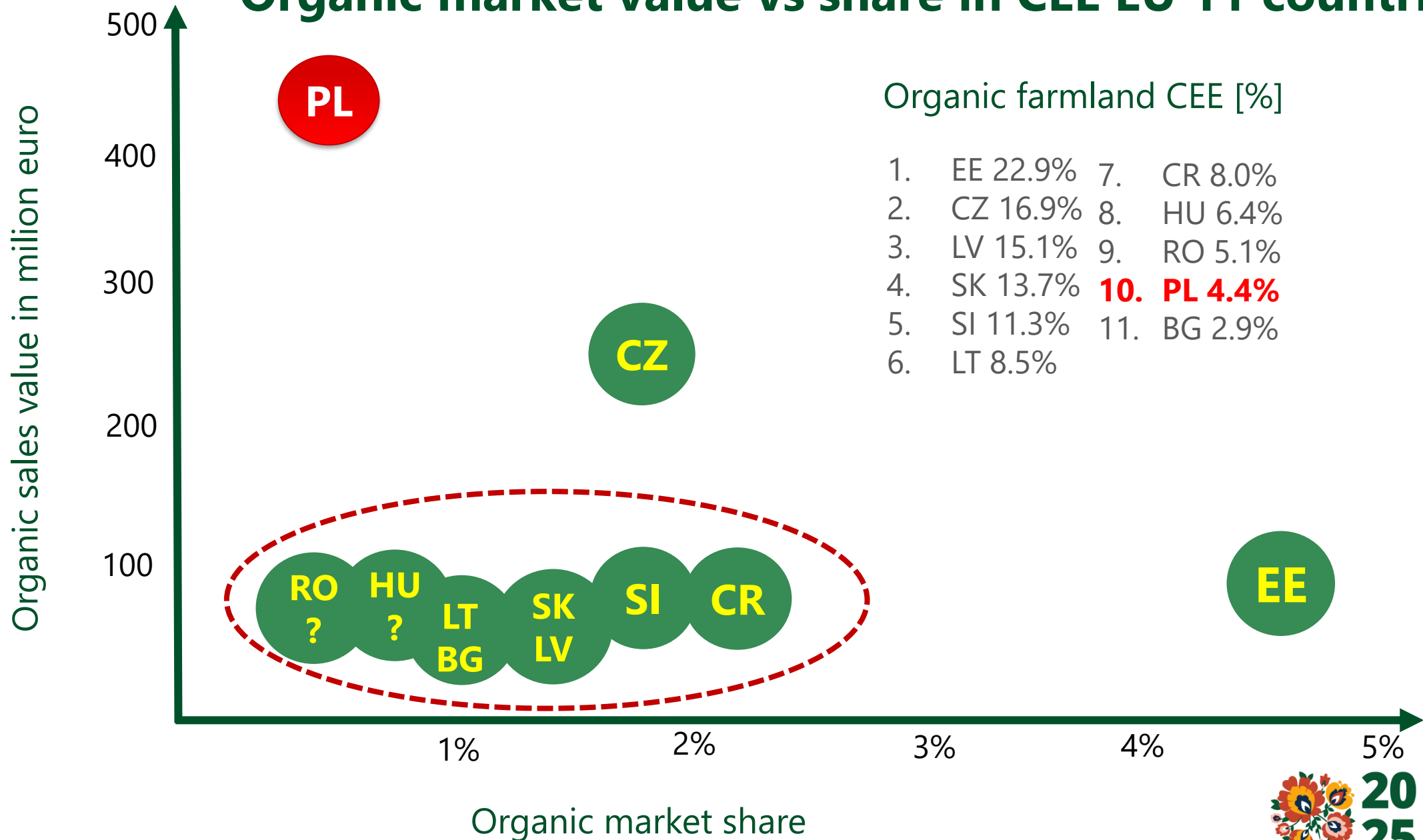
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Institute of Human Nutrition Sciences
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Value of organic retail sales in the EU-27 in 2023, by country (in million EUR)



Organic market value vs share in CEE EU 11 countries



Organic Food Market In Poland [2024]

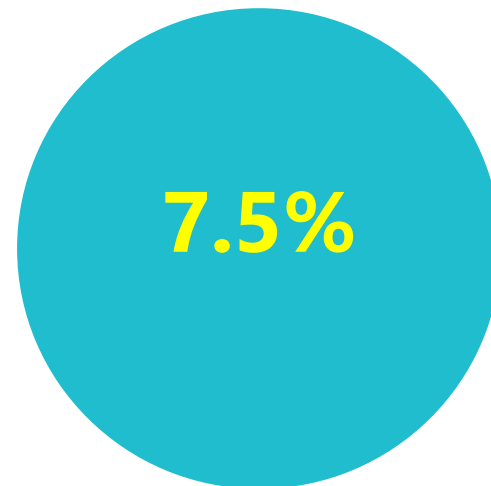
RETAIL SALES VALUE



MARKET SHARE



2024 vs 2023



CONSUMPTION



Organic agricultural area :

691.471 ha (4.7%)

Agricultural producers:

23.100 (0.02%)

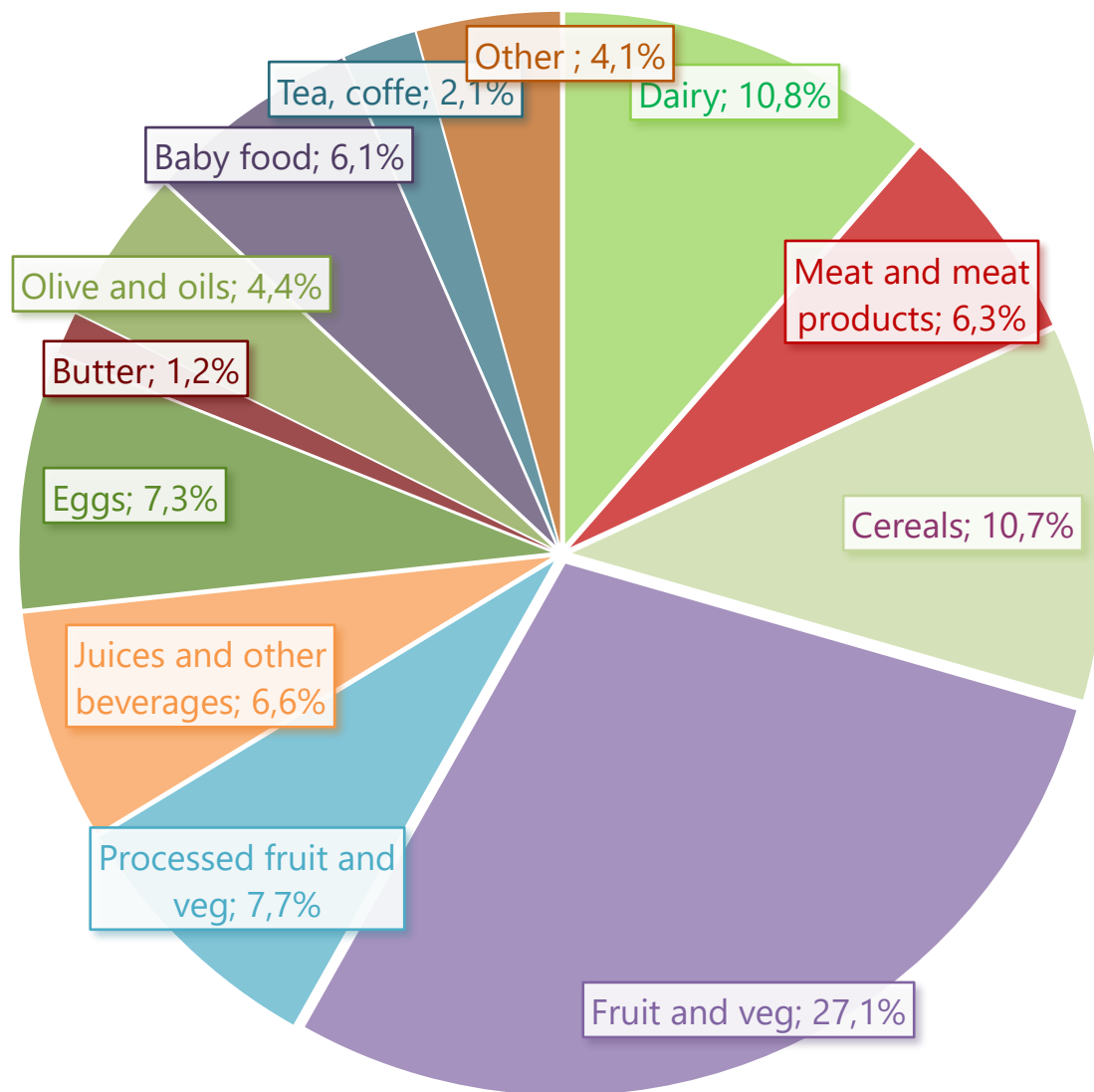
Processors (preparation):

1.227

Socio-Economic Profile of Organic Food Consumers

- Women
- Millennials (ages 35–44)
- Higher socio-economic status (SES)
- Households with children
- Urban residents

Organic retail sales value share [2023]



Highlights:

Unprocessed fruits and vegetables – 27.1%

Milk and dairy products – 10.8%

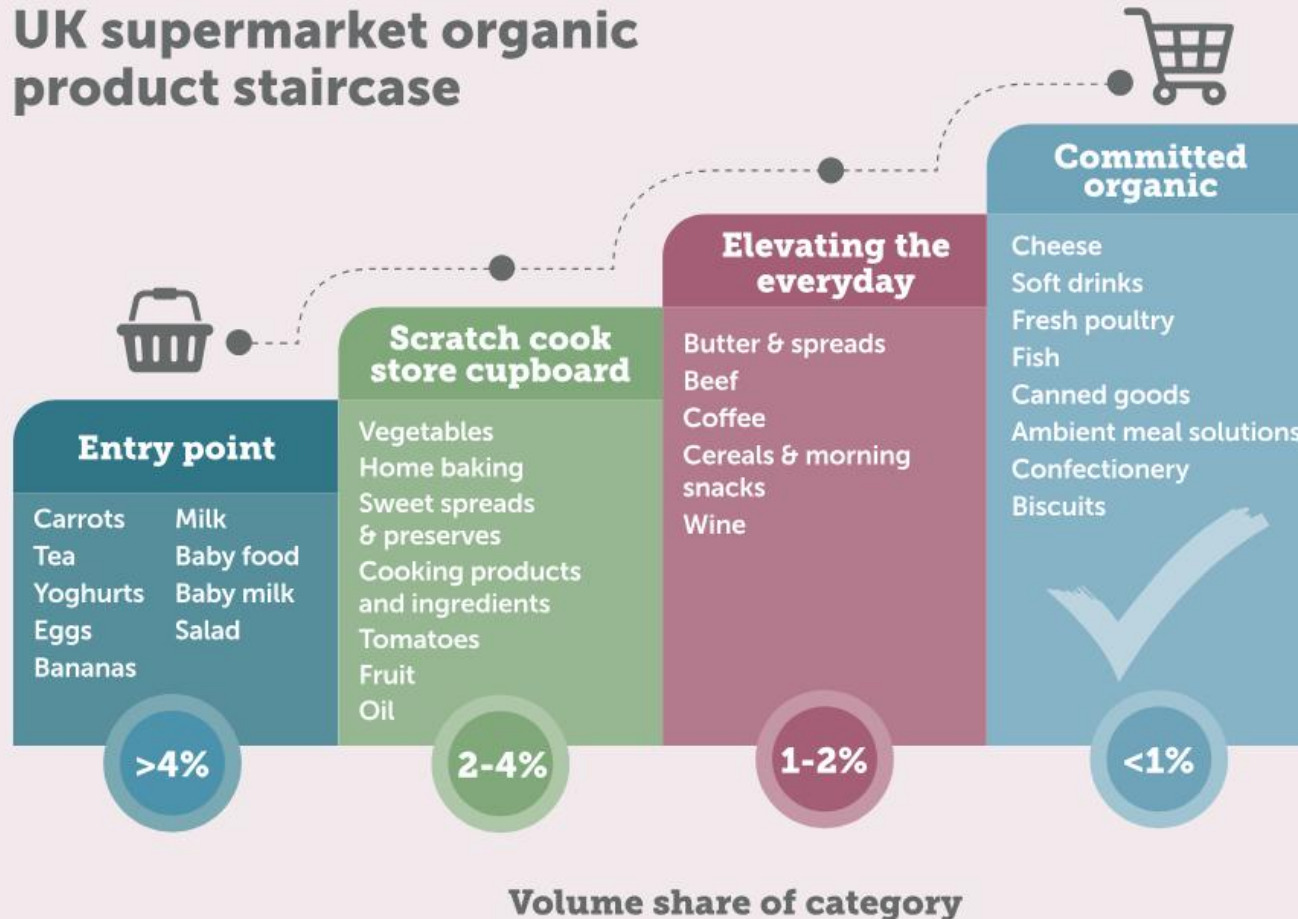
Cereal products – 10.7%

Processed fruit and vegetables – 7.7%

Eggs – 7.3%

Polish „Organic staircase”

UK supermarket organic product staircase

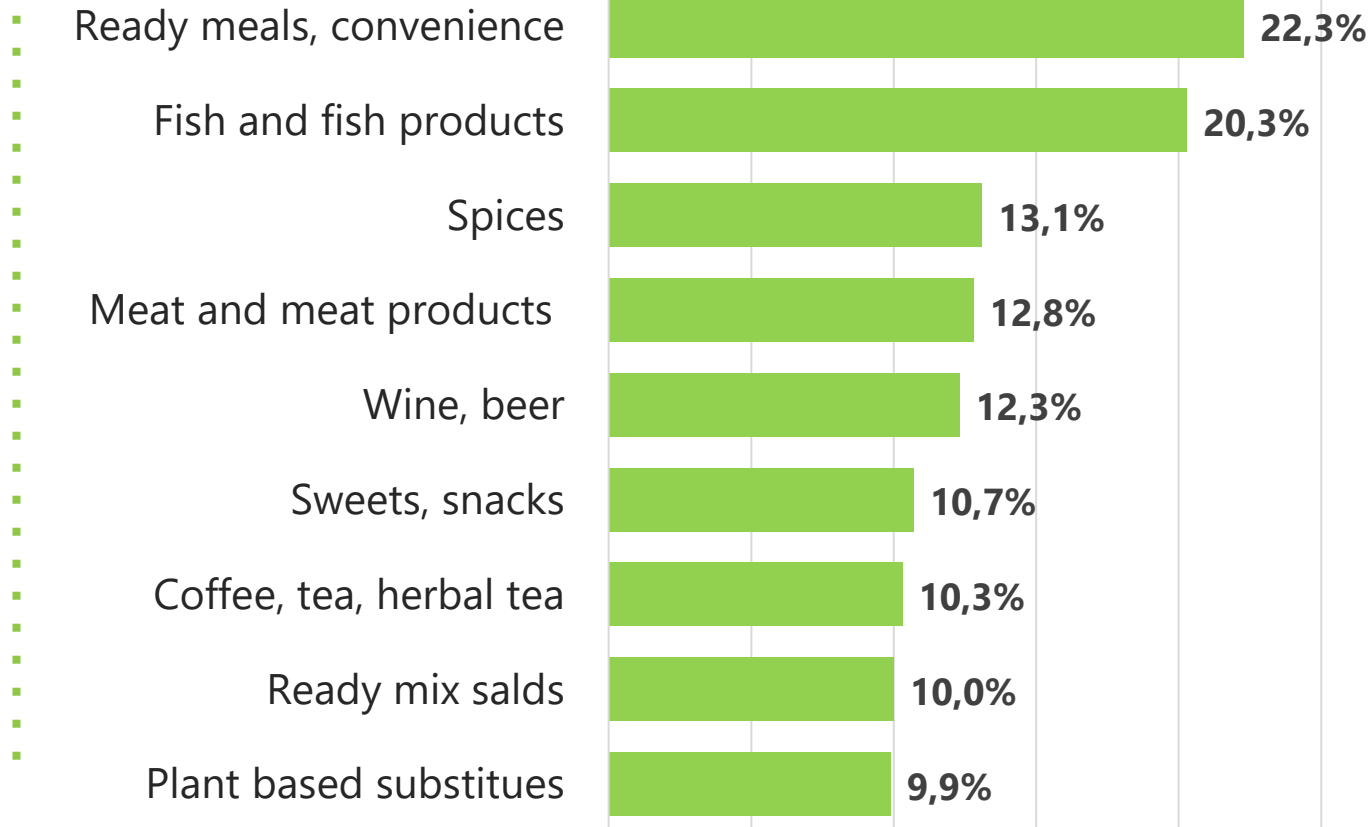


Source: NielsenIQ Scantrack data for the Organic Food & Drink category Soil Association Certification defined for the 52 week period ending 28 December 2024, GB Total Coverage @ 2025 The NielsenIQ Company. Categories chosen with Organic Market value >£25m

PL ENTRY POINT:

1. Vegetables: carrot, beetroot, onion, red pepper, garlic, leafy veg, sour cabbage&cucumber, tomatoes
2. Fruit: Bananas, apples, citrus fruit, berries
3. Dairy (milk, yoghurt, kefir)
4. Eggs
5. Baby food
6. Breakfast cereals
7. Plant based beverages

Up the stairs: What organic products do consumers find lacking?



<https://ekopierozek.pl/produkty/ekologiczne-pierogi-z-miesem/>

Organic retail landscape in Poland

Highlights:

- Organic is becoming more affordable
- Discounters still on the rise
- Private labels hold a significant share (40%)
- Organic shops remain an important player
- Convenience stores are watching from the sidelines



± 700
Independent
retailers

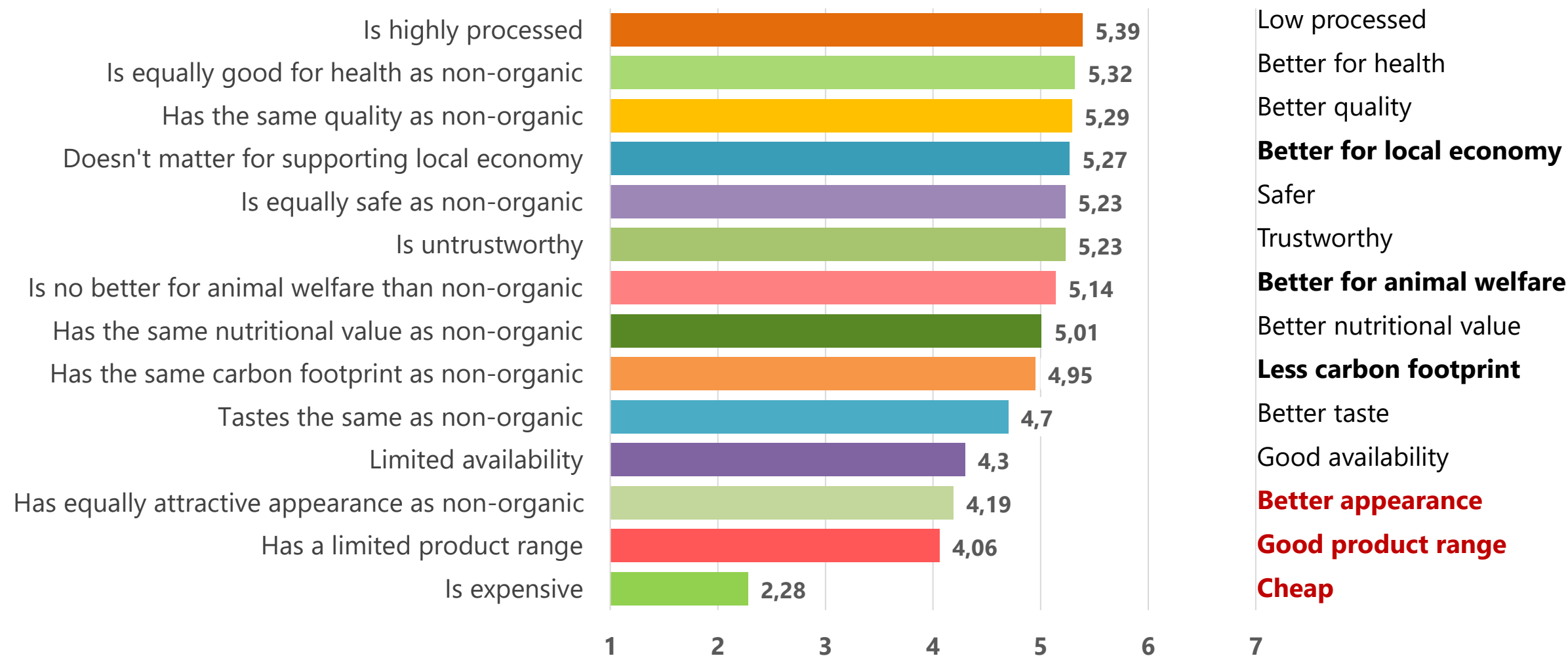
± 100
online
shops

Direct
sale



19

Beliefs about organic food among Polish consumers



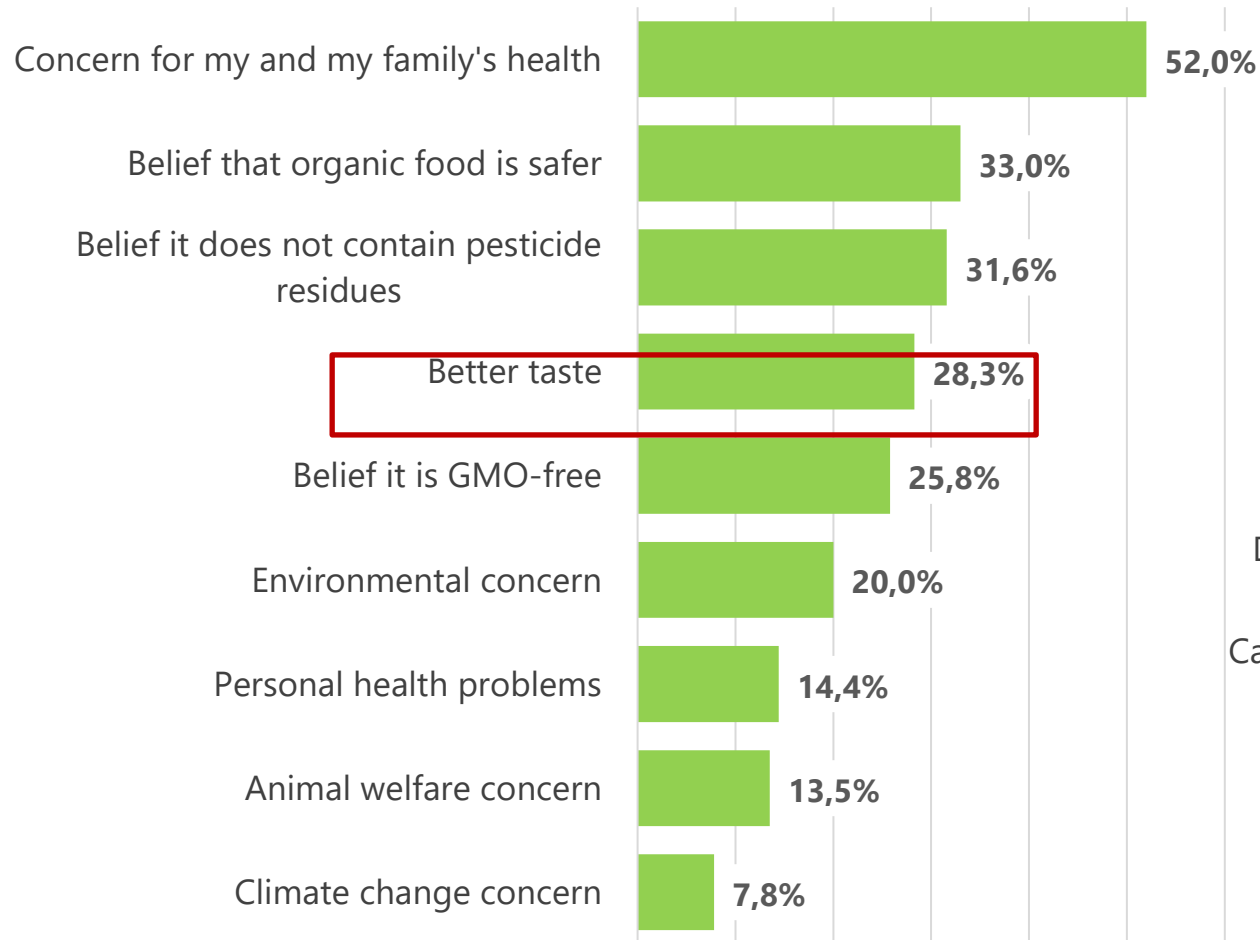
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Source: Marketing, Promotion and Market Analysis: Research on the Market Value of Organic Products in Poland, by Production Sector, and Identification of Products with the Highest Development Potential. Project funded by the Ministry of Agriculture and Rural Development, 2023.

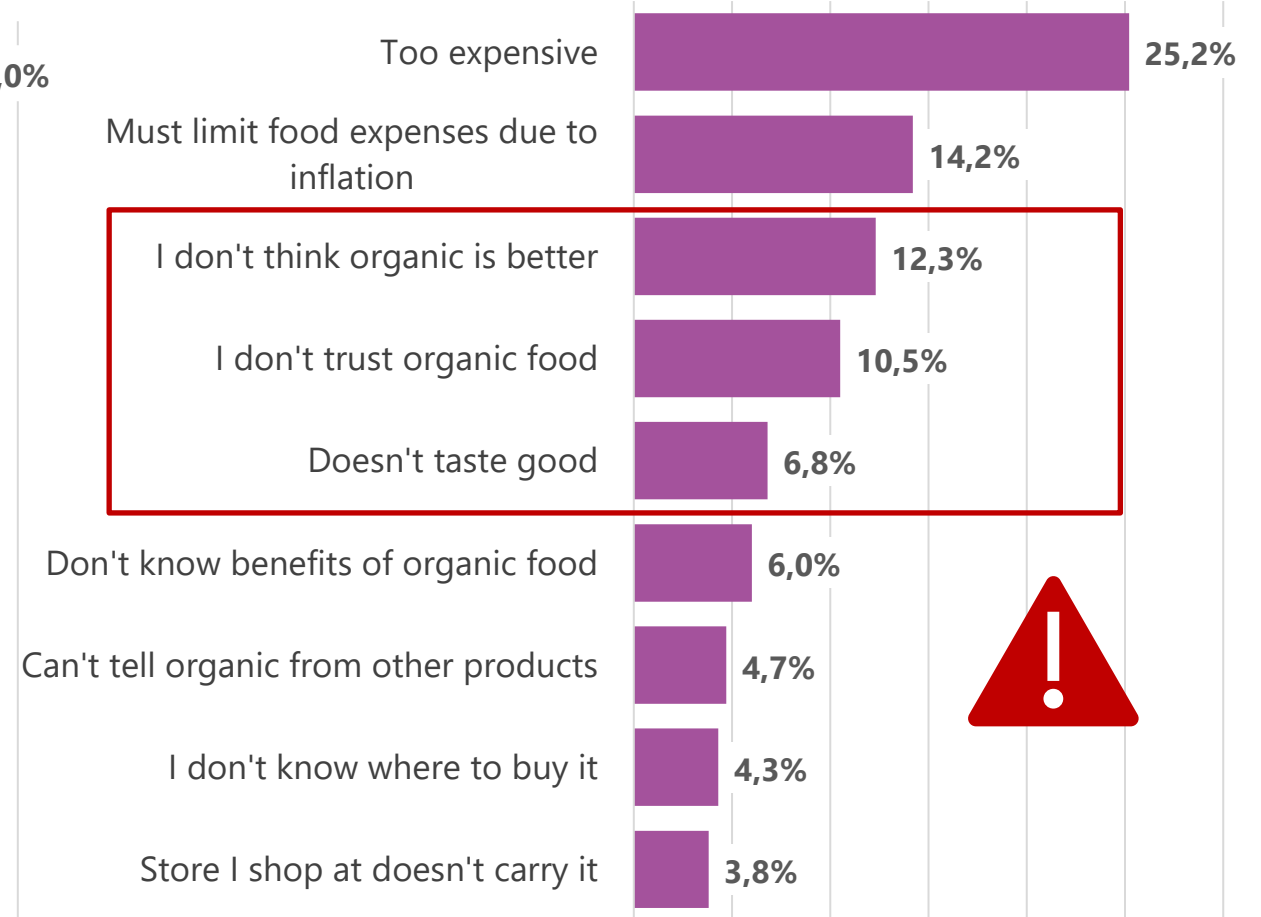
[2023, n=1553]

Drivers and barriers to buy organic food in Poland

REASONS TO BUY



BARRIERS TO BUY



[2023, n=1553]



Bridging the Attitude–Behaviour gap in organics (CMO model)



Understanding the organic-minded consumer in Poland

Insight from segmentation analysis

Health-oriented mindset: "I care about healthy eating" – 5.66

Conscious food choices, guided by sustainability, ethical concerns, and a strong sense of personal responsibility:

„Decisions about what I eat and drink are important to me” – 6,03

„It's important to understand the impact of our eating habits on the environment” – 5,93

„I try to choose food produced in a sustainable way” – 5,76

„I'm concerned about the conditions in which the food I buy is produced” – 5,39

Trust organic farmers: "I trust more organic farmers than non organic"" – 5.02

**"Conscious and values-driven"
(36.5%)**



Understanding the organic-minded consumer in Poland

Insight from segmentation analysis

Demonstrates strong preferences for ethical sourcing, animal welfare, and supporting local producers:

"I choose free-range eggs" – 6.1

"I choose locally produced food" – 5.47

"I buy vegetables/fruits directly from farmers" – 4.92

But...have a passion for good food, consider it an important part of their life, and are open to new sensory and culinary experiences...

**"Conscious and values-driven"
(36.5%)**

Key Consumer Food Drivers...

Taste

Affordability

Health and Wellness

Convenience

Sustainability and Ethics

Transparency and Trust

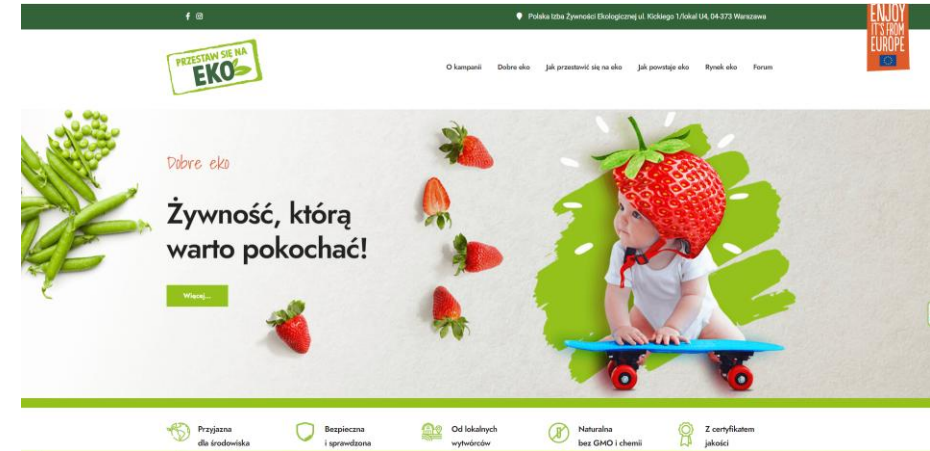
Safety and Quality

Experience and Personalization



Challenges Ahead – Key Market-Related Concerns of Stakeholders

- 1. Promotion of organic food – 63.2%**
2. Tax preferences for organic food processors – 63.2%
3. Launching organic deliveries to educational institutions – 49.1%
- 4. Preference for organic food in public procurement – 33.3%**
5. Specialist consulting – 24.6%
6. Support for the development of new products – 24.6%
7. Free legal advice – 21.1%
- 8. Development of organic food marketplaces – 19.3%**
9. Marketing training – 19.3%
- 10. Access to market data – 7.0%**



<https://przestawsienaecko.eu/>



Thank you for your attention!

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Organic
AS A
NEW
NORMAL