

# REGIONAL DIAGNOSIS OF THE ORGANIC SECTOR OF ŁÓDZKIE REGION



## Table of contents

Summary .....	4
Introduction.....	4
European frameworks.....	7
Current production and market trends.....	7
EU support for the organic food sector.....	9
Regional policy and legal regulations regarding organic production.....	11
Legal conditions for the production of organic raw materials and farm certification process.....	11
Legal regulations in the European Union (EU) .....	11
National regulations .....	11
Control and certification system in organic farming.....	13
Entities authorising certification bodies to carry out control and to issue certificates and supervising these bodies .....	13
Control system in Poland .....	14
Stages of document exchange in connection with planned inspections of new farms and ecological companies by certification bodies.....	14
The list of certification bodies in Poland .....	15
Labelling of organic products: .....	15
Statistical data .....	16
National forms of support .....	17
Regional stakeholders .....	18
Łódzkie Region Executive Board.....	18
Agricultural Market Agency, Regional Branch in Łódź .....	19
Agricultural local government unit.....	20
Research units .....	20
Advisory unit.....	21
Organic stakeholders from the private sector .....	22
The stakeholders bringing together organic and non-organic sector/stakeholders from non-organic sector .....	22
Challenges identified in the region and possible solutions.....	23
Consumer profile .....	23
Certification of organic products.....	23
Processing technologies .....	23

SWOT ANALYSIS.....	24
Production and processing .....	24
Marketing .....	25
Training and consulting .....	25
Conclusions and recommendations .....	26
Needs of SMEs .....	26
Further actions .....	27

## Summary

In the Lodzkie region, the increasing demand for organic food conduces to development of organic farms, while growing demand for organic food is most often conditioned by health, the willingness to provide safe food for children and the need to improve diet. The main areas of support include the following: integration of neighbours from large urban agglomerations by expanding social cooperatives focusing on high-quality food; establishment of associations of entrepreneurs from organic food sector and organic farmers; marketing of local/traditional organic products in social campaigns combined with study visits, in particular for children and teenagers (showing how production looks like, participation of recipients in organic food manufacturing); support of local farmers in the field of logistics, marketing, modern sales technologies, and thus shortening the supply chain (producer - consumer). There is also a need to establish an electronic system (a platform) which will make data gathered by various entities trading in organic products available. Its goal will be to disseminate information about such products and consequently increase the number of customers. In addition, a strong emphasis should be placed on the promotion of organic products which will directly translate into increased awareness of final recipients. Proposed activities in this regard include among others social campaigns combined with visits at organic plants/farms showing the process of organic food production with an emphasis on its good impact on health.

## Introduction

Five units have been engaged to work on the SME ORGANICS project in the Marshal Office of Lodzkie Region:

- Regional Office of Lodzkie Region in Brussels;
- Department of Regional Policy;
- Department of Entrepreneurship;
- Department of Agriculture and Environmental Protection;
- Department of Rural Development.

The Regional Office of Lodzkie Region in Brussels is responsible for coordinating and implementing the project, for example for organising trips to study visits to partner countries, meetings with a group of stakeholders, a study visit in Poland as well as for monitoring of works on project documents, i.e. Regional Diagnosis and Organic Action Plan.

The Department of Entrepreneurship and Department of Agriculture and Environmental Protection have been engaged as an advisory body responsible for substantive analysis of project-related issues, while the Department of Regional Policy and Department of Rural Development are responsible for the substantive analysis of activities related to the development of the Organic Action Plan and their possible financing from the European Union funds, in particular from the Regional Operational Programme of the Łódzkie Region and the Rural Development Programme.

**Stakeholders from whom data have been obtained:**

**Łódzki Rynek Hurtowy "Zjazdowa"**

ul. Budy 4, 91-610 Łódź  
[www.zjazdowa.com.pl](http://www.zjazdowa.com.pl)

**POLSKA WITALNA SP. Z O. O.**

Łódź 90-237, ul. Matejki 34A  
[www.polskawitalna.pl](http://www.polskawitalna.pl)

**EM AGRO**

Wilczkowice Dolne 38, 99-100  
[www.facebook.com/emagrokrjewscy](http://www.facebook.com/emagrokrjewscy)

**AMKEZ**

Hucisko Przybyszowskie 15,  
97-524 Kobbie Wielkie  
<http://www.amkez.com>

**EKO-NATURA S.C.**

Kopyść 48, 98-100 Łask  
[www.kwaschlebowy.eu](http://www.kwaschlebowy.eu)

**Zielony Lis s.c.**

ul. Paderewskiego 5/12  
93-530 Łódź  
[www.zielony-lis.pl](http://www.zielony-lis.pl)

**Organic farm "Mrowisko"**

ul. Łopatki 8, 98-100 Łask  
[www.facebook.com/pg/GospodarstwoEkologicznemrowisko](http://www.facebook.com/pg/GospodarstwoEkologicznemrowisko)

**Research Institute of Horticulture in Skierniewice**

ul. Konstytucji 3 Maja 1/3  
96-100 Skierniewice  
[www.inhort.pl](http://www.inhort.pl)

**Łódź University of Technology, Faculty of Biotechnology and Food Science**

ul. Wólczańska 171/173

90-924 Łódź

[www.binoz.p.lodz.pl](http://www.binoz.p.lodz.pl)

**Waldemar Fortuna**

owner of a farm

**Owocni Spółdzielnia Socjalna**

ul. Sikorskiego 45/49 lok., 15

95-015 Głowno

[www.owocni.org](http://www.owocni.org)

**LokalnyRolnik.pl**

[www.lokalnyrolnik.pl](http://www.lokalnyrolnik.pl)

**Arkadiusz Kartus**

owner of a fruit-growing farm

**The Agricultural and Food Quality Inspection**

**Main Inspectorate (IJHARS)**

ul. Wspólna 30, 00-930 Warszawa

[www.ijhars.gov.pl](http://www.ijhars.gov.pl)

**Central Statistical Office (GUS)**

al. Niepodległości 208, 00-925 Warszawa

[www.stat.gov.pl](http://www.stat.gov.pl)

**Fruit and vegetable juice pressing**

**Wiatrowy Sad Grażyna Wiatr**

Kałużew 14, 95-061 Dmosin

[www.wiatrowysad.pl](http://www.wiatrowysad.pl)

## European frameworks

### Current production and market trends

A dynamic growth and development on the organic food market has been observed in recent decades.

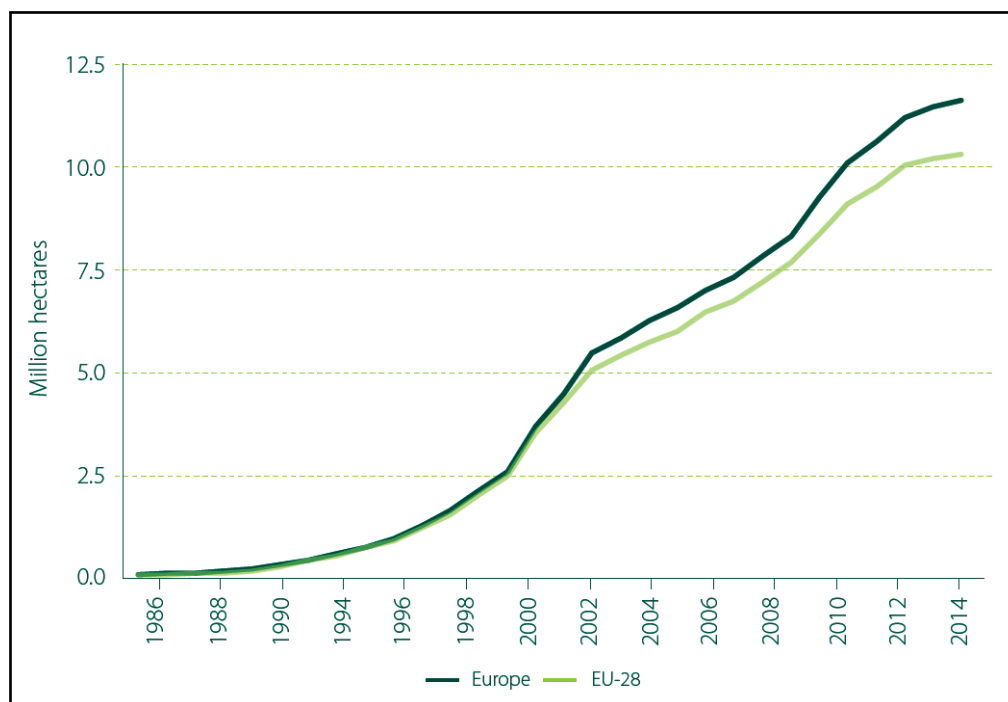
**Table 1. Main production areas and market trends in 2014.**

Group of countries	Retail sale (EUR billion)	Consumption per person (EUR)	Producers	Area of land (million ha)	Share in total land
<b>EU-28</b>	24	47.4	257,525	10.3	5.7 %
<b>Europe</b>	26.2	35.5	339,824	11.6	2.4 %
<b>Global</b>	62.6	8.3	2,260,361	43.7	1.0 %
<b>EU-15</b>	23.5	58	194,979	7.8	6.1 %
<b>EU-13</b>	05	4	62,546	2.4	4.7 %
<b>CPC</b>	0.005	0.1	73,375	0.5	1.5 %
<b>EFTA</b>	2.1	154	8500	0.2	4.4 %
<b>Other European countries</b>	0.1	1	424	0.7	0.2 %

Source: FiBL-AMI survey of 2016 based on domestic sources (Willer et al., 2016)

EU-28: Belgium (BE), Denmark (DK), France (FR), Germany (DE), Greece (EL), Ireland (IE), Italy (IT), Luxembourg (LU), the Netherlands (NL), Portugal (PT), Spain (ES) and United Kingdom (UK), Austria (AT), Finland (FI) and Sweden (SE), Cyprus (CY), Czech Republic (CZ), Estonia (EE), Hungary (HU), Latvia (LV), Lithuania (LT), Malta (MT), Poland (PL), Slovakia (SK) and Slovenia (SI), Bulgaria (BG) and Romania (RO), Croatia (HR). EU-15: BE, DK, FR, DE, EL, IE, IT, LU, NL, PT, ES, UK, AT, FI and SE. EU-13: CY, CZ, EE, HU, LV, LT, MT, PL, SK, SI, BG, RO, HR.

**Table 2. Currently, organic production accounts for 5.7% of the agricultural EU area (2.4% in Europe) – based on data from 2014 regarding the total area of agricultural land under organic management, doubled in the last decade**



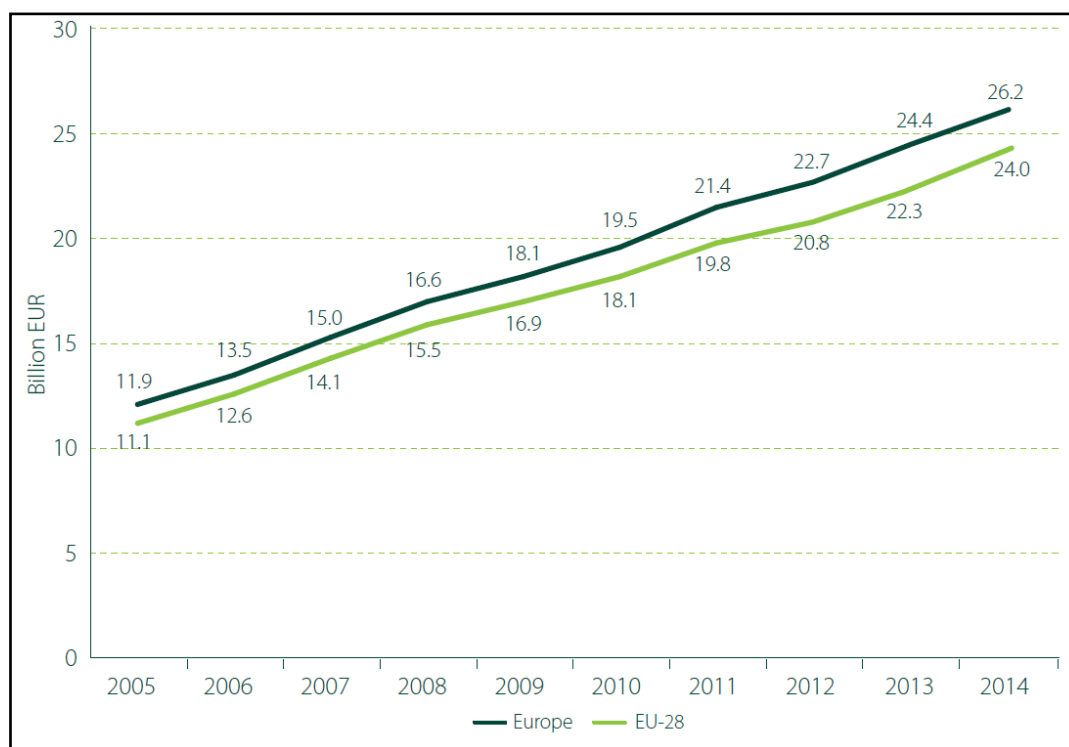
An increase in organic agricultural land in Europe, 1985-2014, source: Lampkin, Nic, FiBL-AMI surveys 2006-2016 and OrganicDataNetwork surveys 2013-2015 (Willer et al. 2016)

An increase in organic agricultural land is caused by a strong demand for organic production and high-quality products in Europe. Only in the last decade, the EU market has doubled its value from EUR 11.1 billion in 2005 to EUR 24 billion in 2014 (from EUR 11.9 billion to EUR 26.2 billion in Europe).

The organic food segment in Poland is growing at a very fast rate. In the last seven years, the market value has tripled. In 2018, the value of the organic food market will exceed PLN 1 billion. A share of organic food in Polish food market amounts to 0.3%, while this number in Austria, Switzerland and Denmark is equal to 6.5%, 7.7% and 8.4%, respectively. The EU average is approx. 4%. The size of Polish market is negligible when compared to other highly developed countries, but continuous growth in sales and number of companies producing certified organic food (currently 560) indicates an increasing interest of consumers in this trend.



**Table 3. Retail sales growth in Europe, 2005-2014**



Source: FiBL-AMI surveys 2006-2016 and OrganicDataNetwork surveys 2013-2015 (Willer et al. 2016) At the same time, recent data on production and market trends show the challenge of bridging the gap between growing demand and the supply base (Stolze et al., 2016).

## EU support for the organic food sector

Policies supporting organic farming emerged in Europe in the late 1980s and are now broadly applied in many countries. Development of such policies reflects increasing awareness of how organic farming may contribute to agricultural, environmental and rural development policy. Organic Action Plans are used in many countries to coordinate environmental support policies (Schmid et al., 2015).

The policymakers face the challenge of supporting the multifunctional system of organic farming at the national and European level, as it ensures health of present and future generations and environmental balance.

*Important:*

*Management of organic land and farms – ensuring public good*

*The market of organic products – responding directly to consumers' needs*

There is a need to balance stimulation of supply with stimulation of demand and greater market orientation. An integrated approach is required. It is being implemented more or less successfully by means of Organic Action Plans (Schmid et al., 2015).

Common Agricultural Policy remains one of the key instruments that support organic farming mainly within the framework of EU Rural Development Programmes by helping to convert conventional methods into organic ones and afterwards supporting to maintain organic farming.

Subsidies for training and consultancy, innovation, market development, investment capital and promotion of organic food are additional support for organic farming under Rural Development Programmes. Such programme may also be used as a context for an action plan, with a section devoted to other instruments, i.e. organic conversion and support in maintaining organic farming.

The EU policy focused on the organic sector involves also promotional programs to support organic products in the internal market and in third world countries (Green Public Procurement, Horizon 2020 – the framework programme for research and innovation).

Taking into account that Rural Development Programmes are financed under the European Agricultural Fund for Rural Development, they are closely linked to other European Structural and Investment Funds, such as the European Social Fund and the European Regional Development Fund, the Cohesion Fund.

The European Structural and Investment Funds (ESI Funds) are the main instrument for the coordination of various funds the goal of which is to help achieve the aims set under the Europe 2020 Strategy – intelligent, sustained development.

Partnership with the European Commission establishing the application of the ESI Funds to achieve the objectives of the Europe 2020 strategy as part of the national strategic objectives is a part of coordination of the Member States.

## Regional policy and legal regulations regarding organic production

Legal conditions for the production of organic raw materials and farm certification process

Legal regulations in the European Union (EU)

### **The organic farming system in EU is currently governed by three regulations:**

- framework Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products, repealing Council Regulation (EEC) No 2092/91;
- Commission Regulation (EC) No 889/2008 of 5 September 2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control;
- Commission Regulation (EC) No 1235/2008 of 8 December 2008 laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries.

### National regulations

The organisational system of organic farming in Poland is governed by national legal acts and strategic documents. The most important ones are as follows:

- The Act on organic farming of 25 June 2009;
- The Act of 5 December 2014 amending the act on organic farming;
- The Act on organic farming of 25 June 2009 – consolidated text;
- The Act on supporting rural development by the European Agricultural Fund for Rural Development under the Rural Development Programme for 2014-2020 of 20 February 2015;
- The Act of 10 June 2016 amending the act on registration and protection of names and designations of agricultural products and foodstuffs as well as traditional products and some other acts;
- The Act on trust services and electronic identification of 5 September 2016;
- Regulation of the Minister of Agriculture and Rural Development of 2 March 2010 on organisational units assessing and confirming the compliance of organic production resources with the requirements set out in regulations regarding organic farming and maintaining a list of these measures;
- Regulation of the Minister of Agriculture and Rural Development of 18 March 2010 on certain conditions of organic production;
- Regulation of the Minister of Agriculture and Rural Development of 29 April 2015 on the acquisition of organic inspector's license;

- Regulation of the Minister of Agriculture and Rural Development of 10 November 2010 amending the regulation on organisational units assessing and confirming the compliance of measures for organic production with the requirements set out in regulations regarding organic farming and maintaining a list of these measures;
- Regulation of the Minister of Agriculture and Rural Development of 17 August 2015 on standard form of the list of producers who met the requirements for production in organic farming, and the method of its provision;
- Regulation of the Minister of Agriculture and Rural Development of 28 April 2015 on the results of the analyses carried out;
- Regulation of the Minister of Agriculture and Rural Development of 26 May 2015 on general derogations from organic production conditions;
- Regulation of the Minister of Agriculture and Rural Development of 26 May 2015 on official and reference laboratories and the scope of analyses performed by these laboratories;
- Regulation of the Minister of Agriculture and Rural Development of 11 May 2016 on the types of irregularities or infringements of organic farming regulations and minimum measures that certification bodies are obliged to apply if such irregularities or infringements in organic farming are identified during inspection;
- Regulation of the Minister of Agriculture and Rural Development of 15 June 2016 amending the regulation on official and reference laboratories and the scope of analyses performed by these laboratories;
- Regulation of the Minister of Agriculture and Rural Development of 23 March 2017 amending the regulation on the results of the analyses carried out;
- Regulation of the Minister of Agriculture and Rural Development of 25 August 2017 amending the regulation on standard form of the list of producers who met the requirements for production in organic farming, and the method of its provision;
- Regulation of the Minister of Agriculture and Rural Development of 4 September 2017 amending the regulation on the types of irregularities or infringements of organic farming regulations and minimum measures that certification bodies are obliged to apply if such irregularities or infringements in organic farming are identified during inspection;
- Notice of the President of the Council of Ministers of 6 October 2017 on rectification of the error;
- The Development Strategy of Lodzkie Region 2020;
- Regional Innovation Strategy for Lodzkie Region RIS LORIS 2030: Innovative farming and agriculture and food processing.

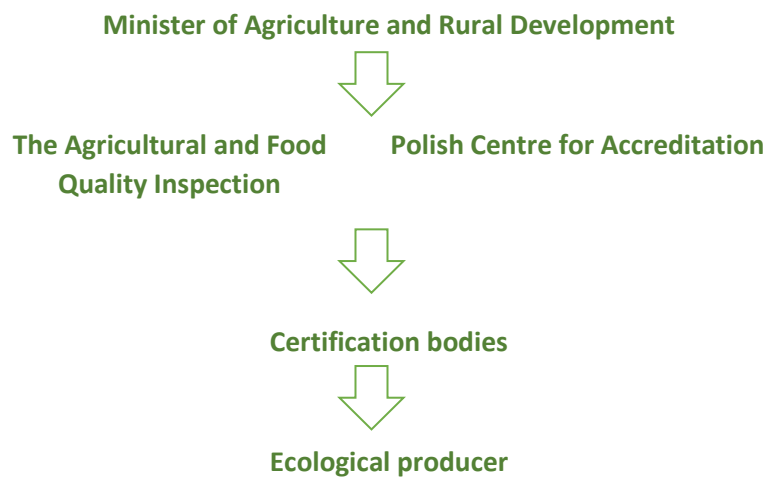
## Control and certification system in organic farming

The functioning of the control and certification system in organic farming is a guarantee for the consumer that foodstuffs available on the market have been produced in accordance with the applicable regulations on organic farming and are free of contaminants, such as: residues of plant protection products and hormones, and that no artificial fertilizers and genetically modified organisms were used during their production. In our country, it is the process of production and processing of organic raw materials and not of the final product that is subject to control, which is why not all marketed fruits and vegetables and their products are tested for pesticide residues and other contaminants. Control in organic farming is carried out by certification bodies employing persons entered in the register who are licenced to carry out such controls, i.e. “organic farming inspectors”. Such persons have passed an examination carried out by the selection committee. They are granted a certificate of being entered into the register and a personal stamp to be used during inspections while drawing up inspection reports. Such legal solutions make their activities official. This solution is unique in the European Union.

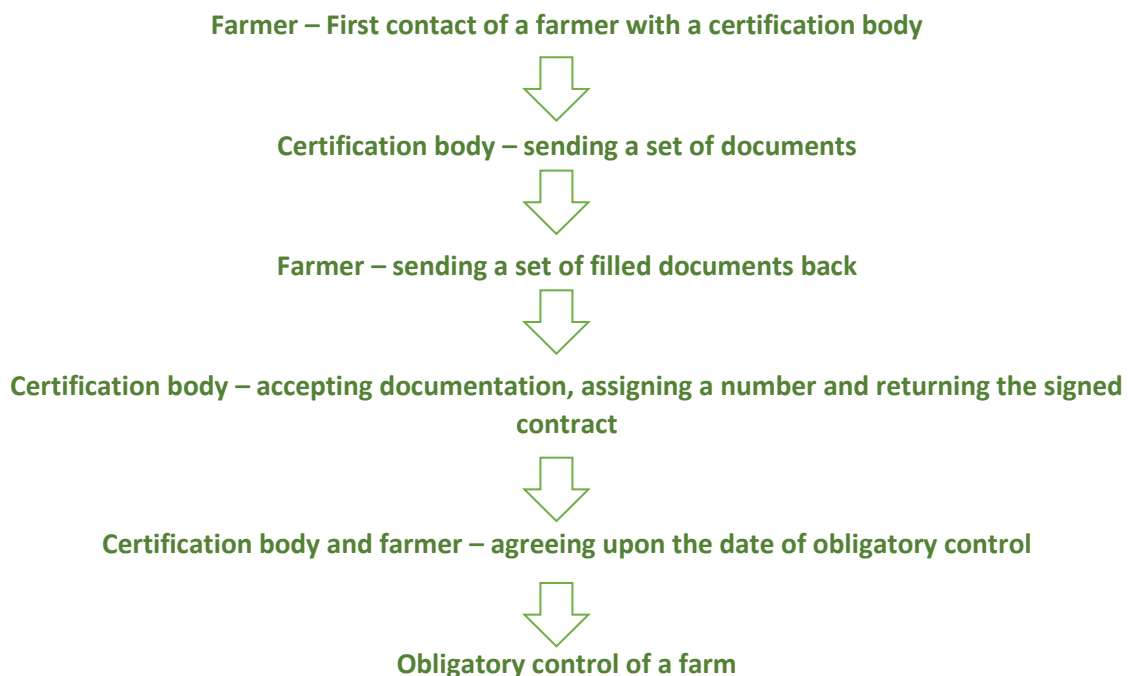
## Entities authorising certification bodies to carry out control and to issue certificates and supervising these bodies

- The Minister of Agriculture and Rural Development, as an entity authorising certification bodies to control and issue certificates;
- The Agricultural and Food Quality Inspection (IJHAR-S) supervises certification bodies and organic production;
- The Trading Standards Authority cooperates with IJHAR-S in exercising supervision over certification bodies and organic production, in the scope of placing products listed in Article 1(2)(a) or (b) of Regulation No. 834/2007 on the retail market;
- The Veterinary Inspection cooperates with IJHAR-S in exercising supervision over certification bodies and organic production, in the scope of products listed in Article 1(2)(c) of Regulation No. 834/2007;
- The State Plant Health and Seed Inspection Service cooperates with IJHAR-S in exercising supervision over certification bodies and organic production, in the scope of products listed in Article 1(2)(d) of Regulation No. 834/2007;
- Authorised certification bodies accredited for organic farming in accordance with the requirements laid down in the most recent versions, notified by publication in the C series of the Official Journal of the European Union, European standard EN ISO/IEC 17065:2013 or the ISO Guide 65 (“General requirements for units maintaining product certification systems”).

## Control system in Poland



## Stages of document exchange in connection with planned inspections of new farms and ecological companies by certification bodies



### The list of certification bodies in Poland

The list is provided at <http://www.minrol.gov.pl/Jakosc-zywnosci/Rolnictwo-ekologiczne/Kontrola-i-certyfikacja>

### Labelling of organic products:



The use of the logo on organic food labels produced in the European Union has become mandatory since 1 July 2010. It may also be used by organic producers from outside the EU, if these products meet the EU requirements of organic farming. The logo was selected in January 2010 in a competition announced by the European Commission. In order to guarantee fair competition and protect the consumers' interest, the new EU organic logo has been registered as the Organic Farming Collective Mark in the Benelux Office for Intellectual Property and in the Community and international register. The "Euro-leaf" – eco-label that can be placed by producers meeting the requirements on the organic production on labels of their products. It is obligatory on all pre-packaged organic products produced in the Member States and complying with the applicable Community standards. The logo features EU stars in the shape of a leaf on a green background. The eco-logo conveys two clear messages: Nature and Europe. The Eurobarometer study has shown that the "Euro-leaf" – a special EU logo is already recognized by a quarter of EU citizens (24%).

## Statistical data

**Table 4. Regional data – Łódź Voivodeship**

	Source	2015	2014	2013	2012
<b>Number of organic producers/farms</b>	BDL*, IJHARS	526	544	550	537
<b>Number of organic processors/processing companies</b>	Report on organic farming in Poland in 2013-2014; IJHARS	40	34	17	15
<b>Number of organic food importers</b>	IJHARS	43	32	18	10
<b>Area of organic agricultural land (ha)</b>	IJHARS	10,157.36	11,228.87	10,341.81	9,908.72
<b>Total area of agricultural land (ha)</b>	BDL	1,103,135	1,100,298	1,112,531	1,113,600
<b>Share of organic agricultural land area in the total area of agricultural land (ha)</b>	BDL	0.87%	0.91%	0.74%	0.57%
<b>Total number of farms</b>	BDL			128,309	130,241
<b>Share of organic farms in total number of farms</b>	BDL			0.43%	0.42%
<b>Total value of regional food market (in PLN) – wholesale and retail sale</b>	BDL		5,248,730.3	6,082,369.9	5,283,916.3



**Table 5. National data**

Area of organic agricultural land (ha)	<b>BDL</b>	580,730.03	657,902.06	669,969.37

- Local Data Bank

## National forms of support

**Table 6. Forms of support for the organic food sector**

Instrument	Responsible authority	Beneficiary	Financial contribution	Production	Processing	Commercialisation and marketing	Consulting and training	Education	Innovation	Value chain management
<b>support for studies concerning the organic food sector</b>	national level – Minister of Agriculture and Rural Development	national research institutions, universities, agricultural units of the Polish Academy of Sciences	they annually financed from 12 to 32 research projects in 2004-2013	X	X				X	
<b>agricultural advisory services</b>	national level – Minister of Agriculture and Rural Development, advisory centre	farmers, reproductive and experimental farms		X					X	
<b>Information and promotion activities</b>	national level – Minister of Agriculture and Rural Development	organisations active in the field of organic farming				X				
<b>Rural Development Programme (2007-2013)</b>	national level – Minister of Agriculture and Rural Development; regional level – Marshal Office of Lodzkie Region	Organic farmers	Reimbursement of fixed costs resulting from participation in the system (permanent grassland, vegetable farming, herb farming, fruit-growing).	X				X		

<b>Rural Development Programme (2014-2020)</b>	national level – Minister of Agriculture and Rural Development; regional level – Marshal Office of Lodzkie Region	Municipal, powiat and local action groups	Infrastructure, training, educational projects, indirect aid					X	X		
--	---	---	--	--	--	--	--	---	---	--	--

## Regional stakeholders

The stakeholders from the private and public sectors along with the areas in which they operate are presented below.

### Lodzkie Region Executive Board

Lodzkie Region Executive Board plays a crucial role in sharing regional policy by preparing the most important strategic documents for the region, i.e.: Development Strategy of Lodzkie Region for 2020 and Regional Innovation Strategy for Lodzkie Region LORIS 2030. In addition, Lodzkie Region Executive Board for the Regional Operational Programme for Lodzkie Region for the period 2007-2013 and 2014-2020.

ROP 2014-2020 for the Lodzkie Region contains 11 priority axes that correspond to the challenges faced by the region that were identified in key strategic documents, including Development Strategy of Lodzkie Region for 2020 and Regional Innovation Strategy for Lodzkie Region LORIS 2013, and provide for areas of intervention the support of which will end with most visible effects. The Priority Axis II. Innovative and Competitive Economy of the ROP for Lodzkie Region 2014-2020 involves supporting the creation of new products and services. SMEs are direct support recipients – the goal of which is to increase companies' competitiveness and place high-quality services and products on the market.

The Development Strategy of Lodzkie Region 2020 described the Area of Agriculture Development in the Region along with the challenges identified:

- establishing producer groups;
- developing local and regional markets;
- promoting regional and organic products.

The strategy i.a. assumes that by 2020 access to EU funds will speed up the implementation of innovative solutions, which will contribute to the development of the organic farming sector.

Innovative agriculture and agri-food processing constitute one of the greatest potential identified in the Regional Intelligent Specialisations provided in LORIS 2030.

RIS3 describes structures at strategic and operational level in order to carry out activities among entities that usually do not cooperate with each other.

### Agricultural Market Agency, Regional Branch in Lodz

The Agency carries out the following activities as part of the mechanisms undertaken:

- It provides agricultural producers, processors and exporters with financial resources for participation in mechanisms of EU agricultural policy administered by the Agency and national activities (RDP 2014-2020 Measure 11 Organic farming - Campaign 2017);
- It issues administrative decisions related to the participation of these entities in the mechanisms of the Common Agricultural Policy (CAP) and national policies;
- It informs about the conditions to be met in order to use the EU mechanisms managed by the Agency;
- It administers registers maintained on the basis of national and EU law;
- It monitors the volume of quota and out-of-quota production within the allocated production quotas;
- It collects and pays financial resources for the promotion of food from EU and national budgets, as well as from funds for the promotion of agri-food products.
- It carries out controls to determine whether entrepreneurs who receive financial resources granted by the Agency or the right to produce specific products, operate in accordance with the regulations;
- It provides the European Commission (EC) with information on CAP activities implemented by the Agricultural Market Agency;
- It participates in making decisions by the EU institutions that are related to administered CAP mechanisms and provides beneficiaries and all interested persons with information about these decisions;
- It draws up periodic and *ad hoc* analyses, forecasts, information and studies on the current and predicted situation on basic agricultural markets;
- It carries out information activities aimed at increasing the knowledge on the EU agricultural policy programmes managed by the Agricultural Market Agency and the conditions for participation in these programmes.

## Agricultural local government unit

### **Chamber of Agriculture of Lodzkie Region**

As a unit of agricultural local government that brings together farmers who pay the agricultural tax, the Chamber of Agriculture of Lodzkie Region was operating pursuant to the Act on Agricultural Chambers of 14 December 1995. The agricultural local government acts on numerous levels. Article 5 of the Act on Agricultural Chambers sets forth its statutory activities that are implemented by: - providing farmers with advice on all matters related to agriculture, including organic farming; free legal advice; activities carried out by committees appraising damages to mitigate the effects of losses suffered by farmers that are caused by adverse weather conditions and damages caused by wild game and forest animals; conducting training activities related to agriculture; organisation of conferences (for example "Organic farming in Lodzkie Region – development perspectives"). The Chamber participates in initiatives carried out by local communities, Olympiads and competitions the goal of which is to improve conditions and safety of living in rural regions. Another initiative undertaken by the Agricultural Chamber of Lodzkie Region was to implement the project "Farming as a driving factor of the Lodzkie Region" during which two cultural, educational and exhibition events were organised. They took place on 1 June 2014 in Nowe Zduny and on 7 September 2014 in Szadek. Farmers and producers of organic food were promoted there and during these events they could exhibit their organic products and promote ecologic activities.

Thanks to the Chamber, farmers from Lodzkie Region could participate in the TECH & BIO organic technique fairs in Valence that took place in France on 23-24 September 2015. During the fairs, the farmers could broaden their knowledge and improve their skills in the field of organic farming techniques, and visit organic farms.

We hope that thanks to activities undertaken by the Agricultural Chamber of Lodzkie Region the farmers from our region will decide to switch to organic farming and quickly catch up with farmers from other Member States.

## Research units

### **Research Institute of Horticulture in Skierniewice**

The Institute has been conducting research in the field of organic horticultural production since 2004, namely since it has received first financial resources for this purpose. The aim of these studies is to develop and improve organic technology used to grow fruits and vegetables. For the purposes related to studies on organic fruit growing, the team of workers organised under supervision of dr hab. Elżbieta Rozpara the first in Poland Organic Experimental Orchard in Nowy Dwór-Parcela (commune of Nowy Kawęczyn, Lodzkie Region) at the Institute of Horticulture. This research facility is annually certified in organic farming. Multidimensional experimental works are conducted there as part of the Multi-annual Institute of Horticulture Programme and other projects financed on the basis of regulations of the Minister of Agriculture and Rural Development and EU projects. These works include: assessment of suitability of different species and varieties of horticultural plants for organic farming, innovative

methods of soil and plant maintenance at organic plantations. Experiments concerning methods of preventing and combating diseases, pests and weeds in organic farming of horticultural plants are also an important part of these works. Studies on organic nursery and seed production are also carried out.

The Institute of Horticulture successively notifies the producers of the results of studies on organic horticultural production during Organic Workshops, during thematic conferences, with the help of specialist studies, lectures and horticultural journals. In the final phase, the first edition of “Organic Fruit Production Technology” will be developed.

### **Lodz University of Technology, Faculty of Biotechnology and Food Science**

As a public university, Lodz University of Technology, Faculty of Biotechnology and Food Science participates in research on the food sector, including organic food and food having good impact on health. It conducts training sessions and offers consultancy in the field of creating technological processes in the above-mentioned area and innovation of food production with regard to sustainable development. The Faculty of Biotechnology and Food Science offers four modern studies (biotechnology, food technology and human nutrition, environmental biotechnology, cosmetics technology) and numerous majors making it possible to become an engineer or M.Sc. degree, including studies in English. While studying food technology and human nutrition, students learn how to conduct technological and biotechnological processes in food production, including methods of preservation and storage of food. They are taught how to implement and supervise food production and become familiar with the requirements of proper human nutrition. They develop their skills studying majors, such as food technology, food analysis and assessment. Studies in the field of environmental biotechnology shape skills related to the prediction, prevention and determination of ecosystem pollution. Graduates acquire skills expected by enterprises and institutions that deal with municipal services management and in industrial plants generating waste, as well as in local government units that protect and monitor the environment.

### **Advisory unit**

#### **Lodzkie Agricultural Advisory Centre with its office in Bratoszewice**

The Department of Organic Agriculture and Environmental Protection provides advice on the development and promotion of organic farming and environmental protection; improvement of the quality of agri-food goods; agricultural, environmental and climate programmes; renewable energy sources; preservation of rural natural heritage: biodiversity, increasing the rural forest cover, water and sewage management, and waste management. The Department of Organic Agriculture and Environmental Protection provides advice on the development and promotion of organic farming and environmental protection; improvement of the quality of agri-food goods; agricultural, environmental and climate programmes; renewable energy sources; preservation of rural natural heritage: biodiversity, increasing the rural forest cover, water and sewage management, and waste

management. The Department disseminates environment-friendly agricultural production methods and lifestyle, i.a. by means of the following activities:

- disseminating knowledge and providing assistance in the field of agricultural production using ecological and integrated methods, including development of plans for farms to switch to organic production;
- promoting organic food manufactured using integrated methods on the consumer market by presenting farms and their products during promotional events, fairs and exhibitions;
- cooperating in the implementation of tasks resulting from agri-environmental programmes and action programmes aimed at reducing outflow of nitrogen from agricultural sources in particularly exposed areas.

### Organic stakeholders from the private sector

Area	Number
Agricultural producers producing organic products in Lodzkie Region	373
Producers producing and trading in organic products in Lodzkie Region	55
Organic food processors in Lodzkie Region	33

Source: The Agricultural and Food Quality Inspection 2016

### The stakeholders bringing together organic and non-organic sector/stakeholders from non-organic sector

- Łódzki Rynek Hurtowy “Zjazdowa” – a wholesale market with a supra-regional scope, at which agricultural producers sell vegetables and fruits;
- Polska Witalna – a society promoting healthy, balanced lifestyle in harmony with nature;
- Zielony Lis s.c. – online shop offering high-quality food products;
- Waldemar Fortuna – owner of a farm;
- Lokalny rolnik [Local farmer] – a purchasing platform that allows for buying products directly from farmers;
- Wiatrowy Sad – a company that produces fruit juices from its own fruit farm.

## Challenges identified in the region and possible solutions

### Consumer profile

- The need to expand and educate a group of consumers interested in organic food;
- Insufficient local marketing of organic products;
- The need to develop agriculture supported by society, i.e. agriculture producing safe, healthy food (direct consumer-producer contact, shorter supply chain, lowered product prices, the producer manufactures its goods for specific group of recipients – cooperatives);
- The need for social campaigns combined with visits to organic farms and companies processing organic food (showing how production looks like, visitors participating in the process of organic food development – educational aspect) in order to broaden the group of consumers interested in high quality food, in particular among children, teenagers and students;
- Model of organic fairs in housing estates;
- Promoting the importance of food cooperatives and community in the production and distribution of organic food;
- Creating a community of producers and consumers;
- Integration of neighbours from large cities by expanding social cooperatives focusing on high-quality food;
- Consumers with allergies to the chemical ingredients in food (dyes, preservatives, fertilizers) are becoming an increasing group of recipients.

### Certification of organic products

- Lack of awareness of the recipient of “Euro-leaf” product logo;
- Farmers from small farms do not see the need to certify their products, because they sell them to neighbours and people referred to them. Nevertheless, organic management methods are a good solution for such farms, because they could sell certified products at higher price to specialist shops, etc.;
- Insufficient support at the local level in the field of environmental education;

### Processing technologies

- Limiting imported organic food and focusing on innovative processing of local organic products.

## SWOT ANALYSIS

### Production and processing

#### Strengths

- Rare use of pesticides and synthetic fertilizers;
- A very large and potentially very receptive internal market;
- The use of traditional, environmentally friendly cultivation and processing methods;
- Growing awareness of farmers regarding the harmful effects of chemicals used in agriculture on the environment;
- High research and development potential, especially related to biological implementations;
- High economic activity of the region's inhabitants;
- Specialization of the region in the cultivation of fruit and vegetables and breeding;
- A large number of ecological farms organised in a manner that is conducive to livestock production;
- Organisation of farms conducive to the protection of biodiversity as well as the unique and well-preserved biodiversity of agricultural areas;
- High quality of organic products.

#### Weaknesses

- Local environmental pollution;
- Local pollution of surface water;
- Low quality of tourist infrastructure;
- Poor growth of the organic food production sector, low share of such food on the domestic market and poor export of processed organic products;

#### Opportunities

- Growth in demand for high quality food on the domestic and European market;
- Growing interest in organic food;
- EU policy focused on using the potential of individual regions;
- Development of organic farming as being environmentally friendly.

#### Threats

- Change in agricultural policy to the detriment of ecological farms.



## Marketing

### Strengths

- Advanced IT services;
- A large number of warehouses and logistic infrastructure.

### Weaknesses

- Low availability of subsidies for the marketing of organic food;

### Opportunities

- Growing interest in active forms of spending a weekend;
- Vogue for healthy lifestyle and health protection;
- Society more and more interested in organic products;
- Availability of funds for organic farming;
- Increasing environmental awareness of society.

### Threats

- Limited availability of organic food and lack of information about places of sale.

## Training and consulting

### Strengths

- A well-developed system of higher education;
- Activity of local communities;
- Well-conducted research: research units, e.g. the Institute of Horticulture provides knowledge and new solutions to organic farmers as part of studies on organic farming financed by the Ministry of Agriculture and Rural Development;
- promotion of the idea of biological implementations in agriculture through consultancy and training of farmers (Regional Centre of Microorganisms).

### Weaknesses

Few funds for training farmers and consumers about agriculture and organic food

### Opportunities

- Strengthening the system of connections, cooperation and transfer of knowledge between theoreticians and practitioners;
- New, unique educational activities in the field of organic farming;
- Broadening the curriculum in the field of organic food in agricultural schools and academic centres.

### Threats

- Slow development of the organic market;
- Competition in the form of imported food from various countries of the world;
- Value chain management.

### Strengths

- Development of new sales technologies through a purchasing platform, i.e. lokalnyrolnik.pl;
- Strengthening direct sales (shortening the supply chain, eliminating intermediaries);
- Creating a community of producers and consumers;
- Integration of neighbours from large cities by social cooperatives focusing on high-quality food;
- Support for small enterprises and farms by enabling sales in large cities (through the purchasing platform).

### Weaknesses

- Insufficiently development market for organic products;
- Low availability of products, high prices;
- No willingness farmers to associate, hence it is difficult to organise larger batches of uniform organic products;
- Low environmental awareness of the region's inhabitants;
- Poor marketing strategy of producers and traders in the region related to organic food.

### Opportunities

- Large potential of the development of the organic sector;
- High demand for organic food in cities;
- Support for local farmers in the field of logistics, marketing and modern sales technologies.

### Threats

- Lack of funds to support the planned activities.

## Conclusions and recommendations

### Needs of SMEs

- The need to create a producer group of organic food;
- The need to develop organic agriculture supported by society (direct consumer-producer contact, shorter supply chain, lowered product prices, the producer manufactures its goods for specific group of recipients – cooperatives);

- Business support/consulting for organic food processors – currently it is too expensive and ineffective, help for small businesses and informal groups at every stage of business development, working out specific solutions, focusing on the effect, not theoretical knowledge;
- Insufficient marketing of organic products, the need for social campaigns combined with visits to producers and processors of organic food (showing how production looks like, visitors participating in the process of organic food development - educational aspect);
- Model of organic fairs in housing estates combined with strengthening of cooperatives in cooperation with local governments;
- Limiting the import of organic food and supporting organic local products;
- Strong emphasis on the promotion of organic products – emphasising their impact on health and environment, education in kindergartens, general schools and agricultural schools.

### Further actions

Taking into account the SWOT analysis, further actions should be taken in the following areas: production and processing, marketing, training and consulting, value chain management as well as identified challenges faced by the region. These should include:

#### Cooperatives

- promoting food cooperatives and joint operation of producers and distributors of organic food with the support of local authorities;
- support for neighbourhood eco-fairs (by guaranteeing preferential conditions due to the help of local authorities);
- bringing together key decision makers, entrepreneurs, institutions and units involved in the organic food sector.

#### Education

- support for education for children and teenagers in the field of organic food - lectures in schools, visits to organic farms, participation in practical classes, such as baking bread, making cheese, etc.;
- promoting a healthy lifestyle by educating recipients about organic food, its production process and its differences from conventional food;
- raising the recipients' awareness of the differences in the composition of products with an organic certificate, how certificates are granted and of the requirements to be met by a producer or a farmer to obtain such certificate;
- promoting and disseminating local ecological products through social campaigns, trade fairs and other events;

- broadening the curriculum in the field of organic food in agricultural schools and academic centres.

#### **Value chain management**

Supporting the creation of online platforms and systems bringing suppliers and recipients of agricultural products together that automatically match the offers, is based on modern capabilities of information processing systems and eliminates the need to view an enormous number of offers and provides access to information tailored to the needs determined by the user.