



CONSUMER BEHAVIOR ON THE ORGANIC PRODUCTS MARKET IN POLAND AND OTHER EU COUNTRIES

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Abstract. The aim of the article is conducting a comparative analysis of the organic products market in Poland compared to the other European Union (EU) countries. Poland's accession to the EU in 2004 had a profound effect on consumer awareness in the country, leading to a series of regulatory and legislative changes, as well as alterations in the availability of products and shifts in consumer behavior and decisions. The article presents research on the determinants of purchasing choices, the level of consumer awareness and the technical preparation of Poland in the context of sustainable development policy and the comparative analysis of organic products market between Poland and other EU countries.

Keywords: consumer behavior, ecological awareness, organic products market, European Union.

Introduction to consumer behavior

Consumer behavior is the process of choosing, buying, using, accepting or rejecting products, ideas or experiences in order to satisfy needs or desires. Other researchers define consumer market behavior as mental and physical activities, including their motives and causes (Gupta & Mukherjee, 2022). Consumer behavior is strongly related to economic changes in a given country. This is related to the opportunities, including financial ones, which a given change brings. On the Polish market, trends in consumer behavior are visible, created by globalization and its consequences, as well as all geopolitical changes, which have a direct or indirect impact on shaping consumer behavior. After Poland's accession to the EU, changes in consumer behavior were noticeable in several key areas, including greater diversity and availability of products, the growing importance of conscious consumerism, the development of e-commerce and the development of financial mobility.

Poland's accession to the EU resulted in significant transformations in the structure of food supply. Many more foreign products appeared on the Polish market, which had a major impact on consumer preferences. Increasing access to imported goods, both food and electronic, caused Poles to choose products from outside the country, especially from EU countries, whose quality was perceived as higher. Consumers became more demanding and aware of the quality of products. Due to the increased competition on the market, as well as the liberalization of trade, Poles began to pay more attention to product prices. Prices became an important factor in the choice,

and consumers began to look for promotions, discounts and more advantageous offers, especially in the context of the growing number of foreign retail chains.

Poland's accession to the EU, associated with greater integration with the European market, had an impact on the development of online trade. The volume of international orders increased, accompanied by a heightened level of competition within the domestic market. This in turn led to the further development of courier services and e-commerce infrastructure in Poland. The environment conducive to changes in consumer behavior is also constituted by technological changes in many markets, including those related to various forms of financing. This changed the approach to managing personal finances, and consumers began to use loans more often, especially for the purchase of durable goods such as apartments, cars or consumer electronics and household appliances (Zalega, 2023).

Changes in consumer attitudes also reflected changes in their preferences, which over the years have been shaped as quickly and distinctly as changes in culture, awareness, or preferences. After accession to the EU, new trends related to ecological and ethical production of goods began to appear. Poles began to pay more attention to issues related to the quality, origin of products, and the impact of consumption on the environment. Interest in ecological products increased, and initiatives related to a responsible approach to shopping appeared. Increased prosperity and access to various products and services influenced the lifestyle of Poles. The EU introduced a number of regulations regarding the protection of consumer rights (Mkrtchian, 2023), which translated into an increase in Poles' awareness of their rights. Consumers became more demanding, expecting not only high-quality products, but also better treatment from companies and institutions. The number of complaints and inquiries to consumer organizations has also increased.

Consumer behavior in Poland after joining the EU changed towards greater openness to foreign products, greater attention to the quality of purchases and growing consumer awareness. Changes in consumer behavior are evident in relatively new markets and those associated with increased environmental and economic awareness. Therefore, this article presents changes in consumer behavior in European organic food markets. A market characterized by high quality, development, and strong dependence on European economies and education (awareness). The growing demand for ecological products is one of the elements of changes in the modern consumption model. Organic farming is currently one of the most recognizable food quality systems.

Ecological awareness, understood as concern for the natural environment expressed in choices and actions, is an important factor influencing consumer decisions. Shaping ecological awareness is related to the development of problems related to environmental pollution, climate change and the depletion of natural resources. Consumers are beginning to increasingly consider the impact of their consumption decisions on the planet. The results of a study commissioned by the Ministry of Climate and Environment regarding the ecological awareness of Poles showed that '62% of respondents believe that the state of the environment depends on the activity of each of us' (MKiŚ, 2022). The increase in ecological awareness is the result of many factors, such as social campaigns, ecological education (e.g. in the field of waste segregation), availability of information about the impact of products on the environment (e.g. carbon footprint calculations), growing interest in the topic of sustainable development.

According to a study commissioned by SEC Newgate ESG Monitor, 61% of surveyed Poles declare interest in the topic of sustainable development, which is an increase year-on-year by 13 pp. All this contributes to changing consumer attitudes and behavior. One of the main causes of environmental degradation is unsustainable consumption. Unsustainable consumption and production patterns are the main drivers of climate change crises, such as loss of biodiversity, threats

to human life through pollution, and excessive waste. Although humans constitute only 0.01% of the mass of all living beings, they are responsible for the destruction of 83% of wild mammals and half of all plant species (Arora & Mishra, 2023).

The consumer can contact the European Consumer Point (EPC) in Poland, which will help resolve the issue, e.g. through mediation or advice on complaints to the relevant authorities. If the company does not respond to the complaint or does not want to return the money, the EPC can help report the case to the relevant consumer protection authority in the country where the company is based, or help refer the case to the ODR (Online Dispute Resolution) platform, which is an online dispute resolution system in the EU. Legal protection of the consumer as well as increased competitiveness in the organic food market have made Polish consumers more demanding, and companies have to focus on innovation and improving quality in order to stay on the market. The increased availability of foreign products has also influenced the growth of standards of Polish companies, which have had to adapt their services and products to international standards in order to remain competitive. Poland's accession to the EU also had an impact on the perception of price. Poles, comparing the prices of goods on the European market, began to notice differences in the cost of living and as a result began to approach their purchasing choices more consciously. On the one hand, products from the West became more accessible, but on the other hand, consumers began to analyze the price-quality ratio more, which led to more conscious purchasing decisions.

To structure the analytical framework of the study, the following research questions have been formulated:

- How does the organic products market in Poland compare to that of other EU countries in terms of size, growth dynamics, and consumer behavior?
- To what extent has Poland's accession to the EU influenced the development of the organic food market and consumer awareness in the country?

The analysis of consumer behavior in Poland and other European countries requires research on both domestic and intra-market determinants as well as those with a macroeconomic background, which is why a narrative literature review is an important basis and the main research method in the article.

Review of Literature in Organic Food Markets in Europe

The literature review was prepared on the basis of scientific publications from the past three years (2022–2025), as well as government, institutional, and statistical websites presenting organic food market research in Poland and relevant statistical data. To provide a more comprehensive picture of the Polish market and its development following Poland's accession to the EU, the analysis also included the markets of European countries in which a significant expansion of the organic food sector is observable.

In 2020, the European organic food market reached EUR 52 billion, a 15% increase compared to the previous year. Germany was the largest market with a turnover of EUR 14.99 billion (Trávníček et al., 2022). In 2023, retail sales of organic products in Europe increased to EUR 54.7 billion, of which EUR 46.5 billion were in the EU. The demand for healthy food exhibits both quantitative and qualitative dimensions. Developments within the organic food market have progressed at varying levels of intensity across European countries, making it pertinent to analyze how these transformations are unfolding. That is why the aim of this article is conducting a comparative analysis of the organic products market in Poland compared to the other EU countries.

As consumer awareness of food and its consequences increases, consumers demand more nutritious, fresh, and healthy food (Firoozzare et al., 2024). Research shows that the trend toward increased interest in organic food is undermined during uncertain times such as war or pandemics (Grunert et al., 2023). COVID-19 has thus far played a detrimental role globally and significantly changed people's purchasing behavior (Minh & Quynh, 2024). The purchasing behavior of consumers in the organic food market is confirmed by research and determined by certain demographic groups, with age (usually older, but results are mixed), gender (female), income (higher), education (higher) and marital status (married) more likely to buy organic food (Wang et al., 2023).

As organic products become more popular, increasing efforts are being made in Europe to ensure that organic food is truly organic. Consequently, trust in organic certification systems is growing. Previous studies have shown that trust in organic certification logos plays a significant role in encouraging consumers to purchase organic products (Patel et al., 2022). EU certificates such as CE markings¹ or the green leaf EU Organic Farming Logo have become widely known, and consumers have begun to demand greater transparency in matters related to the origin of products, their ingredients and production methods (Sansome et al., 2025). An undoubted challenge for EU countries is the implementation of the European Green Deal plan, which aims to make Europe the first climate-neutral continent by 2050 (Wolf et al., 2021).

A key initiative in the context of ecological awareness is the 'farm to fork' policy, aimed at creating a sustainable food system that is greener, healthier, fairer and more resilient to climate change. The policy aims to reduce the impact of agricultural production on the environment by promoting more sustainable farming and breeding methods (Elshaer et al., 2023). Food production accounts for a large share of CO₂ emissions. Therefore, this policy aims to reduce greenhouse gas emissions from agriculture, including, among others: by reducing methane and nitrogen oxide emissions and promoting more energy-efficient production methods (Breure et al., 2024).

In Poland, there are large differences in the development of organic agriculture in different regions of the country, which means that the implementation of the policy requires adaptation to local conditions, which is one of the most common arguments raised by farmers during the strike. The traditional model of agriculture is still dominant in Poland, and the transition to more ecological practices requires investment, knowledge and time, which is why it is visible, apart from some farmers, in the form of strikes (Bujdei-Tebeica, 2024). There is another aspect that is a source of farmers' resistance – switching to more sustainable production requires high financial outlays (Touch et al., 2024). Farmers expressed fear of increased costs and reduced production. As a result of the protests, the authorities promised to consider changes to some regulations and introduce measures to support farmers during the transformation period. The resistance of some social groups is undoubtedly a challenge for Poland in the coming years. This policy poses many challenges, but also opportunities for farmers and consumers who can benefit from more healthy and ecological products (Agarwala et al., 2022).

The market for organic products is developing dynamically, especially in highly developed countries. One fifth of the world's organic farming is grown in Europe (Willer et al., 2025). The average share of organic farming in Europe is almost 3%. For comparison, in the world this percentage is only 1.4%. In the EU itself it is 7.2%. The countries with the largest share of organic agriculture are Austria and Estonia – they have over 20% of such crops. In Sweden, organic farming is 18.8%, in Italy, Latvia and Switzerland it is approximately 15%. In Czechia, Slovakia and Finland, the share of organic crops exceeds one tenth of agricultural land. The largest area of organic crops

¹ Conformité Européenne is a symbol informing that the product meets the health, safety and environmental protection requirements applicable in the EU.

(measured in hectares) is covered by crops in large agricultural countries of the EU, e.g. Spain, Italy, France and Germany. These countries produce the most organic food in Europe today (PIŻE, 2024, November 30).

There are many systemic solutions that, through EU law, aim to force individual countries to adopt pro-environmental behavior or to cease unsustainable behavior and activities. One example is the raw plastic tax, which has been in force in the EU since January 2021. Currently, the plastic tax rate is EUR 800 per tonne of unrecycled plastic packaging waste. According to the Ministry of Climate and Environment, in 2024, Poland will pay up to PLN 2.3 billion in plastic tax, compared to PLN 2 billion in 2023. (Business Insider, 2024, April 18). The tax rate is reflected in final product prices and, therefore, may also influence consumer purchasing decisions. The introduction of fees – even symbolic ones – for single-use plastic bags resulted in a quick and widespread change. The Ministry of Climate and Environment informs that before the introduction of the regulation, the annual consumption of plastic shopping bags (applies to all thicknesses) was estimated at approximately 300 pieces per resident. As a result of the introduction of the recycling fee in 2018, the consumption of plastic shopping bags was calculated at approximately 9 pieces. In 2023, the ministry announced that it did not plan to increase recycling fees because the assumed goal of reducing the consumption of plastic shopping bags had been achieved.

Ecological awareness has a real impact on consumer purchasing decisions (Zaniewska & Kobylińska, 2023). It is also closely related to economic awareness. Organic products often have higher prices than their conventional counterparts. However, for consumers who are ecologically and economically aware, a higher price does not prevent them from making conscious choices, because such a choice is an investment in their own health and a better quality of life for themselves and future generations. Consumer behavior is therefore dictated not only by financial possibilities, but increasingly by values and beliefs (Liu, 2024). Modern consumers are willing to pay a higher price for products that are produced in a more sustainable and environmentally friendly way. The price is therefore an expression of a conscious choice that affects environmental protection because it results from the fact that their production requires greater financial and technological outlays.

Many producers of ecological products use innovative technologies that aim to minimize the negative impact of production on the environment (Chavira et al., 2023). Consumers' environmental awareness plays a key role in reducing consumption imbalances. Both increasing environmental pollution and growing amounts of waste have become one of the most urgent problems of the UE economy. The development of technical infrastructure is a necessary condition for environmental protection and waste management. This also applies to the modernization of means of transport, road and highway networks, and the development of rail and inland transport as alternatives to road transport (Hajam et al., 2023).

Given the growing demand for organic food in Europe and increasing consumer awareness, it is worth taking a closer look at individual European countries in terms of market maturity, potential, and challenges, as well as consumer behavior and its drivers.

Comparative study of selected European organic food markets

The first stage of the study involved a literature review of the organic food market and consumer behavior within it. Statistical data on organic food production, market size, and consumption were aggregated and processed in the next stage. Due to the dynamically developing and evol-

ing organic food market, an analysis of the food market situation was conducted, based on data from at least 2021, to provide a basis for further comparative research.

The countries included in the comparative analysis were Poland, Germany, Czechia, Italy, and France. All countries are members of the EU. The following comparative factors (criteria) were used in the comparative study: number of organic food producers, consumption per capita, percentage of organic farming, level of education/support policies, and retail structure. These comparative criteria will determine the level of market maturity and its potential in a given country. The comparative analysis will also produce a map positioning organic food markets in the EU. The selected comparative criteria focus not only on the supply side of the market but also allow for the identification of factors that may influence consumer behavior in this market. The study will demonstrate the position of the Polish organic food market in comparison to other European countries.

Comparing European food markets requires presenting the context of well-being across these countries. In Poland, the primary indicator for determining well-being is GDP per capita or consumption per capita. When comparing European countries, nominal GDP per capita is limited by exchange rates and price differences, so Actual Individual Consumption (AIC) per capita in PPS is a more accurate measure of the material well-being of individual residents. This is a volumetric indicator, and the scale in the EU 27 is 100, facilitating relative comparisons.

The Polish organic food market is still developing, as evidenced by, among other things, the growing number of organic producers. According to government reports on the state of organic farming, this number was: 21,795 in 2021; 22,882 in 2022; and 23,995 in 2023. For comparison, in Germany in 2023, there were 35,400 organic farms. In 2023, the EU had the largest number of organic producers in Italy with 84,191. Poland is a growing market, but still significantly smaller than Germany or Italy. In 2023, there were 23,995 certified organic producers in Poland. Currently, the largest share in the production of organic food is held by cereals, apples, poultry and eggs, while organic animal production (mainly pork and beef) has recorded a decline in production. Among organic producers, the vast majority were farmers (approximately 93%). The total area of certified organic farms in Poland was 636,021.41 ha, which is an increase of as much as 6% compared to 2022 (Zieliński et al., 2024).

It is also worth comparing the retail structure of individual organic food markets in the EU. In Poland, there are currently approximately 700 stores in Poland specializing in the sale of organic food. The trade in organic food in supermarkets, hypermarkets and general food stores is also developing from year to year. The largest Polish organic food wholesaler, Bio Planet, ended November 2022 with sales of PLN 23.8 million, which means an increase of 30% year-on-year (IJHARS, 2023). The Polish organic food market is also characterized by growing e-commerce and underdeveloped organic distribution due to local sales and limited expansion into other markets. The situation is different in Germany, France, and Italy, where organic food markets are mature. There are strong organic brands, and organic product sales in supermarkets are growing. E-commerce is a popular sales channel, and it is growing. Western European countries are much further along in integrating organic production into the mainstream sales chain.

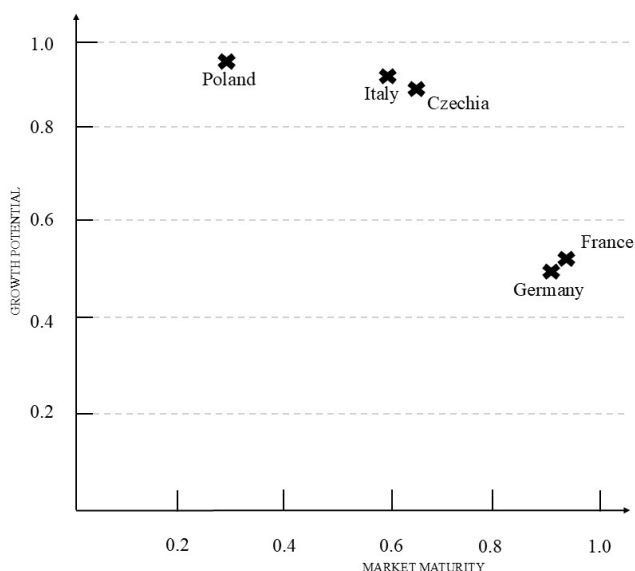
For a more in-depth comparative analysis of European organic food markets, it is also worth considering criteria such as the percentage of organic farming in total agriculture, as well as the less quantifiable but equally important level of education and support policies for organic food markets in individual EU countries. The table below takes these criteria into account.

Table 1. Comparative table of criteria characterizing selected European markets in 2023

Category	Poland	Germany	France	Italy	Czechia
AIC per capita in PPS	86	116	107	101	81
Organic farming in %	3.9 %	11.5 %	10.4 %	18.1 %	11.0 %
The number of organic producers	23 995	~35 400	61 163	~84 191	No precise data available
Main retail structure	fragmented, discount stores, e-commerce	mature market, supermarkets, private labels mature market	mature market, supermarkets	strong growth in supermarkets	supermarkets, e-commerce
Education & support policy	low education, price barriers	high awareness and stable support	mature awareness, stable support	active marketing, support policy	policy plan to increase share (up to 4%)

Source: author's analysis based on data from [Willer et al. \(2025\)](#) and [Eurostat \(2025\)](#).

By compiling the factors shaping the development of organic food markets in EU countries, we can present a map positioning selected countries along two key axes: market maturity and growth potential. Market maturity refers to the level of per capita consumption, retail presence, the number of producers, and the development of public policies. Growth potential takes into account market saturation, the share of organic farming, changes in consumer attitudes, market dynamics, the degree of urbanization, and demographic trends.

**Figure 1.** Positioning map of selected European countries

Source: author's own work.

The positioning map is a complementary tool for characterizing organic food markets in European countries. Germany is by far the most developed market among those studied. It is charac-

terized by high consumption and extensive distribution channels, but the market is close to saturation. France, on the other hand, as a mature European market, still has the potential for further growth, as evidenced by growing consumer interest in organic products, the dynamic development of specialized retail chains, and increasing political and financial support for organic farming, which fosters innovation and increases the area of certified organic crops.

Italy is the leader among European organic food markets. However, it should be noted that Italy is a leader in organic production, but consumption levels are lower than in France and Germany – both due to export potential and growth in domestic consumption. Czechia occupies a different position on the European food market positioning map. It is an emerging market with an active policy supporting its development. Further growth is possible, but this depends primarily on the implementation of plans. The Polish organic food market is in the early stages of development, as evidenced by the rising but still low consumption levels. Poland has high growth potential, especially in terms of consumer education, the development of distribution networks, and political support. To exploit this potential, it is necessary to look at the main challenges of this market, including, above all, the factors that motivate consumers to shop in this market.

Challenges in the organic food market in Poland and other EU countries

The challenges in the organic food market in Poland focus on production costs, consumer education and awareness, and organic farming infrastructure. The higher production costs of organic food in Poland (compared to conventional food) result from lower crop productivity, the need to use more labor-intensive production methods, climatic conditions and certification costs. As a result, organic food prices are often higher, which can be a barrier for a wide range of consumers, especially those with lower incomes. Although awareness of the benefits of organic food in Poland is growing, there is still a need to intensify educational activities. Not all consumers are aware of the difference between organic and conventional products, and they do not always understand the full impact of organic production methods on health and the environment.

In Poland, a major challenge for the organic market is still insufficient supply. Supermarket chains and online stores offer an increasingly wide range of organic products, but there are still regions of Poland where access to organic food is limited. In small towns and rural areas, the availability of such products is often insufficient. In Poland, many farmers do not have sufficient knowledge of organic methods, which is a barrier to the development of this sector. Despite growing government support, there is still a lack of training and access to appropriate tools and technologies.

The challenges in the organic food market in the EU focus on the need to adapt to EU regulations, inequalities between Member States, and food and price security. In the EU, organic farming is seen as a key element of sustainable development policy. Climate change, such as droughts or rainfall variability, pose a threat to the stability of organic production, which is particularly sensitive to changing weather conditions. Compliance with strict regulations on the production and certification of organic food is a challenge for both farmers and producers. These requirements can be expensive and difficult to meet, especially for small farms, which makes it difficult for them to enter the organic market.

Although organic food production is well developed in Western European countries such as Germany, France and the Netherlands, in Central and Eastern European countries – including Poland, this sector is still in the development phase. This requires a differentiated approach depending on the level of development of agriculture in individual Member States. In the face of growing demand for organic food in the EU, there is a risk that producers will be forced to lower standards in order to reduce production costs and increase price competitiveness. This may lead to a decrease in the quality of organic food and a decrease in consumer confidence in this type of product.

There is a great deal of inequality in the development of the organic food market worldwide. In developed countries, e.g. the US, EU, Japan, organic production is well developed, while in many developing countries the sector is still in its early stages. Challenges related to the lack of infrastructure, adequate resources, and education in the Global South are hindering the development of organic farming. Although demand for organic food is growing, in many regions of the world production has not kept pace with this demand. Particularly in developing countries, the lack of appropriate agricultural technology, irrigation water, and other resources necessary for organic food production limits the possibility of scaling up production. As the organic food market becomes increasingly global, trade policy becomes increasingly important. Customs and regulatory barriers, including differences in organic standards between countries, can hinder international trade in organic products. For example, the differences in organic certifications across regions mean that organic products must meet different standards in different parts of the world. As demand for organic products grows, challenges related to certification and quality assurance also arise. There is a risk of misuse of organic certifications, which can lead to greenwashing, or misrepresenting products as organic. In addition, some markets may not have sufficient mechanisms to monitor and ensure the quality of organic food.

Climate change poses a serious challenge to organic farming worldwide. Reduced water availability, changes in soil quality and extreme weather events (e.g. hurricanes, droughts) have a direct impact on yields and the stability of organic production, especially in regions that are already struggling with environmental problems. The challenges in the organic food market in Poland, the EU and worldwide are diverse and include economic, regulatory, technological, social and environmental issues. Although organic food production is developing dynamically, there are still many barriers that hinder its further development. Investments in consumer and farmer education, development of agricultural technologies and appropriate support policies are crucial for this sector to develop in a sustainable and effective manner.

The development of supply on the market of ecological products is determined by both systemic changes and changes affecting the individual, i.e. consumer behavior. Systemic changes force food and cosmetics producers to adopt more ecological solutions, which are visible not only in the context of the product quality itself, but also in the packaging. Systemic changes may also concern and affect consumers directly (not indirectly, as in the case of taxes on producers). The most effective way to change consumer behavior is economic incentives, such as the introduction of fees, taxes or even penalties. The shopping habits of Poles are a very important issue that the state should systematically control and shape so that their behavior and purchasing decisions are as ecological as possible. The modern Polish consumer should be aware of his product choices and their impact on the environment.

The analyses conducted in this study provide comprehensive answers to the research questions posed. The article demonstrates how the organic products market in Poland compares with that of other EU countries and explains the extent to which Poland's accession to the EU has influenced the development of the organic food sector and consumer awareness.

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