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DOI: 10.30858/zer/84948

ORGANIC PRODUCTS IN THE PRODUCERS' AND CONSUMERS' OPINION – CASE STUDY

Abstract

The development of the organic food market is a consequence of changes in the current consumption patterns and the supply increase. The article attempts to answer the question whether consumers and producers have the similar opinions linked to the determinants of choice and perception of organic products as well as elements related to their distribution and marketing. For this purpose, a survey was conducted among the participants of the Poznań Green Market. According to the conducted research, both consumers and producers equitably identify ecological products with high quality and health benefits. These features were also most often indicated as the main determinants of purchase of these products. The differences in the opinions of the surveyed groups concerned knowledge of the signs and places of purchase/ offering of organic food.

Keywords: organic products, consumers, producers, surveys.

JEL codes: D12, Q13, Q57.

Introduction

Despite the dynamic development, particularly in recent years, the organic food market in Poland is still a niche market. As Łuczka-Bakuła points out (2007), in Poland there are optimal environmental and economic conditions which are favourable for the development of organic farming providing supply of finished products and raw materials for the production of processed products. The application of ecological methods of production in many Polish regions is possible because of preservation of high biodiversity and low level of environmental pollution (Brodzińska, 2010).

In accordance with Council Regulation (EC) No. 834/2007 the term “organic production” shall be understood as “the most environmentally friendly practices, high level of biodiversity, protection of the natural resources, application of the high standards concerning animal welfare and production methods complying with the requirements of those consumers who prefer products produced with the use of the natural substances and processes” (Council Regulation No. 834/2007, p. 1). Hence, the organic production is recognised as belonging to the systems ensuring high quality of the products and, at the same time, care for the natural environment (Dévényi, 2011). Increasing demand for organic food is a part of changes in the current consumption models. The factors affecting the purchase of organic products include mainly healthcare, care for the natural environment and animal welfare, level of population income, as well as knowledge and marketing activities of the producers (Dimitri and Dettmann, 2012; Ozgüven, 2012; Shafie and Rennie, 2012; Witek, 2014). Changes in the purchasing behaviour on the Polish organic products market are confirmed by the results of studies carried out, e.g. by Nestorowicz, Pilarczyk, Jerzyk, Rogala and Dissterheft (2016). The authors identified the way the consumers perceived organic products and they assessed barriers and opportunities to organic food market development. In Poland, the consumer preferences related to organic products are also subject of studies of Łuczka-Bakuła (2011), Żakowska-Biemans (2011a, 2011b), Bryła (2016a), Grzybek and Szopiński (2016) and many other.

The organic food market undergoes transformations resulting, on the one hand, from changing expectations and consumers' attitude and, on the other, growth in organic food supply. Further development of this market requires continuous recognition of the drivers of its demand and supply side. Hill and Aleksander (2003) underline that the consumers, their preferences and behaviours play a significant role in the market strategies of the modern enterprises. An important element of these strategies is, e.g., distribution and its multiple functions which, consequently, bring maximisation of clients' satisfaction and offer them products in the place and at the time convenient for them. Information concerning this matter will enable, e.g., a much better adjustment of the offer to the target market needs. It also concerns the agri-food sector, including organic products. The main objective of the conducted studies is the confrontation of the consumers' and producers' opinion on the organic products. Thereby, the aim is to answer the question whether purchasers and sellers assess determinants having an effect on the choice and perception of the organic products, as well as elements related to their distribution and marketing, in a similar manner. Understanding of these issues may be of practical importance for producers of the organic food contributing to improvement of their competitive position on the market. These issues were presented against the background of the selected topics concerning organic food market in Poland.

Methodology of research

The results of the survey carried out during weekly fair “Green Market” in Poznań in 2016 were used as a source material. Therefore, the research is of a local nature. Two corresponding survey questionnaires addressed to consumers and producers were developed. This allowed a comparison of the opinion of respondent groups on the organic products. Following the pilot research, 62 producers who manufacture organic products and 168 consumers of this type of products were randomly selected. The questionnaire, addressed to consumers, consisted of 15 questions. They concerned, e.g.: recognition of the organic products labels, associations related to organic food, opinions on prices and determinants as well as place of purchase of this type of food. In turn, the questionnaire addressed to producers consisted of 17 questions. Those questions concerned: consumers’ awareness and factors that influence the purchase of the organic food, products sale points, opinion on the organic food labels as well as membership in organisation related to organic products. In case of the questions where Likert scale was applied, the weighted average was considered when presenting results of the research. The surveys carried out provided an extensive material which cannot be fully presented due to volumetric restriction of the article. Hence, only the selected results were presented focussing on the comparison of producers’ and consumers’ opinion in accordance with the specified objective. At the same time, it should be emphasised that the specificity of the place where the survey was carried out is the reason why the conclusions should not be of general nature. However, they may constitute the source of information on this kind of purchasers and producers and thus contribute to further analyses and comparisons with the equivalent research carried out on other respondent samples.

Organic food market in Poland

The origin of the organic agriculture in Poland ensuring organic products supply is traced back to 1920s¹. However, only from 1998, the intensified development of the organic production took place, which was affected by the introduction of subsidies to costs incurred in controlling holdings. The direct subsidies to organic agricultural land introduced in 1999, also played a similar role. At the same time, by 2002, the lack of country-wide control systems enabling market systematisation, improvement of export and ensuring consumer protection, was the factor that hindered development of the organic agriculture in Poland. Key changes came into effect with the accession of Poland to the European Union. On the one hand, this provided producers with the opportunity to obtain higher subsidies to organic agricultural land and, on the other hand, it increased oppor-

¹ Steiner, whose lectures became the basis for the environmental practices in agriculture, is regarded as a pioneer of the organic agriculture in Poland (Szołtysek, 2004).

tunities for development of the demand for the organic products offered by the producers (Kowalska, 2010). In the period of 2004-2013, the number of organic producers increased by more than 7 times (from 3.7 thousand to approximately 27 thousand). In 2015, 22,991 farms were involved in the organic production and the area taken up by organic farming amounted to 552,400 hectares, constituting 3.4% of total farm-owned agricultural area in the country (www.minrol.gov.pl). For comparison, the average share of land being farmed organically in relation to total agricultural area in the EU-28 in 2015 was 6.2%. The largest proportion of agricultural area used for organic production was found in Austria (nearly 20%) and Sweden (15.4%). The proportion of the organically farmed land in relation to total agricultural area amounting to 10% was characteristic also for Estonia and the Czech Republic. In turn, in the countries with agricultural production structure similar to this of Poland (in the light of climate conditions), such as Germany and France, the proportion of the area under organic cultivation in relation to total agricultural area amounted to 6.3% and 4.7%, respectively (*Facts and figures...*, 2016). In 2015, the average consumer in the EU spent EUR 54 on organic products. The level of expenditure on such kind of products was significantly higher in Denmark (191 EUR/person/year), Luxembourg (170 EUR/person/year), Germany (106 EUR/person/year) and France (83 EUR/person/year). It determined the high proportion of retail sales of the organic food – in comparison to the other EU countries – in total food sales in these countries. The highest proportion was observed in Denmark (8.4%) and Luxembourg (7.5%). On the other hand, Germany has the world's second largest market of organic products measured by the value of sales amounting to EUR 8.6 billion in 2015. In the top ten EU countries there are also France, Great Britain, Italy and Spain (Willer, Schaack and Lernoud, 2014). The average level of expenditure on the organic products in Poland was more than 12 times lower than in the EU on average and it amounted to EUR 4.4 per person. In 2015, the value of Polish organic products amounted to EUR 167 million and the share of the organic food in relation to the food products market totalled around 0.5%. However, in the last years, the dynamic development of the organic products market in Poland is observed and is estimated to be around 15% annually (Willer, Schaack and Lernoud, 2014; *Żywność ekologiczna...*, 2017).

One of the barriers of the market development is a dispersion of the supply (Blaik, Matwiejczuk and Pokusa, 2005). Hence, the physical flow of the products in the transport and logistics chain is very important. The activities related to the implementation of this flow are carried out by entities of the distribution channels which include commercial brokers, companies providing logistics services, producers and final purchasers. Their proper functioning constitutes one of the most important factors of the food products market development (Smoluk-Sikorska and Łuczka, 2014). According to Nestorowicz and Pilarczyk (2010), despite transformations on the organic products market in Poland,

the distribution channels are characterised by the traditional nature. Babalski (1997) underlines that from the producers' perspective, the short distribution channels are often more favourable on the organic product market. It is connected with the lower costs and margins, which allows for the sale of products at competitive prices. At the same time, the risk of different kind of damage or expiration of the use-by date is reduced. Therefore, in general, at an initial stage of the market development, organic farm relies too much on the direct sale, including sales in its own shop, "next door" or at the market². However, this form of sales is profitable provided that the farm is situated close to the main outlet markets which include large and very large urban agglomerations. The strengths of direct sales are wide possibilities for the producer to control the level of the achieved prices. The smooth cash flows between the seller and purchaser can be observed during this process. When providing the direct sale, the producer may adjust offer to the structure and to the level of demand. In addition, direct contact with purchasers allows to obtain information on customers' expectations and preferences. On the other hand, the fact that direct sale requires greater involvement of the consumer and poses higher sales risk on the producer, is a kind of deficiency (Czunafa, 2001). Bryła (2016b) as well as Maciejczak (2016) indicate that selection of the distribution channel depends on two key factors: product type and consumers' preferences. With the level of development of the organic products market, and thereby with the increase of consumers' interest in these products, the differentiation of places where the products are offered occurs, as has happened in the European Union countries. In addition to various forms of direct sale, the organic products are also sold in the specialist shops and supermarkets.

Research results

Women accounted for 60% of the total number of 168 surveyed consumers. Almost three-fourths of all respondents were people aged 31-40 (59 persons) and 41-50 (63 persons). 25 respondents were over 51 years old and 21 people were respondents aged 21-30. In the surveyed group, 77 respondents declared that they had secondary and higher education degree, of which 32% (54 persons) had higher education degree. The remaining respondents (38 persons) declared that they had professional education. Among respondents 75% (126 persons) constituted employed persons, 10% – pensioners and annuitants, and 7% and 8% – homeless people and students, respectively.

From among the surveyed producers, 23 offered fruit and/or vegetables, and 10 producers offered milk and milk products, meat and meat products. Eight producers manufactured organic cereal products, whereas four producers manu-

² In addition to direct sale forms in different EU countries listed herein, the following are also popular: roadside sale, "door to door" sale, off-farm own shop, tavern – bar, wine bar, "collect yourself", e-sales, neighbourhood sales "from farmer to farmer" (*Sprzedaż bezpośrednia...*, 2013).

factured herbal mixes and the same number of producers provided eggs. Fish and fish products production was declared by two producers and wine production was declared by one producer. The vast majority of producers (84%) cultivate organic crops for more than 3 years. More than a half of the surveyed producers (33 persons) did not belong to any group or organisation related to the organic products. However, 22 producers declared their belonging to “Culinary Heritage” network and 6 producers were authorised to mark their products with “Try Fine Food” label. One respondent belonged to the E. Kwiatkowski Polish Food Producer Association.

One of the first questions that respondents were asked, concerned associations related to organic products, while the producers were asked to indicate what – in their opinion – the organic food is identified with (Fig. 1). A set of answers of two groups was very similar. The highest rating was awarded to high quality of food and its safety for human health. In addition, the producers emphasised specific taste, which was noted with lower score by consumers. Similar proportion of respondents (among consumers – 114, and among producers – 46) recognised the association of the organic products with their high price as important and very important.

The large part of respondents' associations translated into indications concerning determinants having an effect on purchase of organic product. Figure 2 shows that for the consumers, health considerations and high quality of the offered products constitute a key factors deciding on purchase of the organic products. This is confirmed by source literature. Numerous studies conducted among different groups of respondents indicate that health benefits are the most important prerequisite for purchasing organic food (Łuczka-Bakuła, 2011; Żakowska-Biemans, 2011b; Ozguven, 2012; Shafie and Rennie, 2012; Bryła, 2016; Nestorowicz, Pilarczyk, Jerzyk, Rogala and Disterheft, 2016). In addition, the producers listed concern for health in the first place when assessing their purchasing decisions. It can, therefore, be concluded that both producers and consumers are convinced of the health-oriented advantages of the organic products. On the other hand, concern for the environment being a reason for purchasing organic food was assessed by the producers as moderately important or important, whereas for the consumers, it was non-significant factor. The research carried out by Łuczka-Bakuła (2011), concerning the relation between behaviour of the consumers on the organic food market and environmental actions shows that the observed increase in ecological awareness of Polish consumers does not translate into systematic pro-environmental actions. While selecting the organic food, the motivation was dominated by the perspective of individually perceived concern for the health rather than environmental concerns.

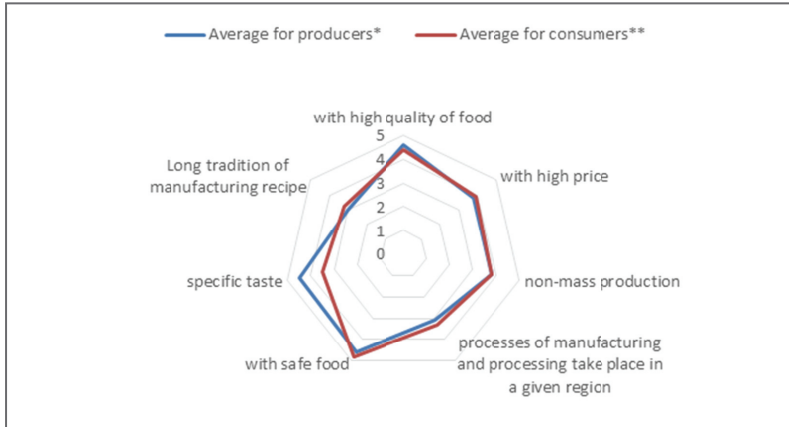


Fig. 1. Identification of organic products by consumers (in producers' and consumers' opinion). Source: own study based on the survey data, $n = 62^*$ and $n = 168^{**}$.

None of the consumers confirmed that his/her purchasing decisions were driven by the possibility to support income of the organic products producers and by the availability of these products. On the other hand, these determinants were indicated by the producers who assessed them, however, as less or moderately important from the consumers' perspective. On the basis of the answers given, it may also be concluded that the organic products prices do not provide consumers with incentives for the purchase. This view is also confirmed by answers given by the consumers to additional questions such as: whether, in their opinion, the organic food is too expensive, which were replied in the affirmative by 106 persons (63% of total number of respondents), and only 29 respondents did not find these products too expensive. The remaining respondents had no opinion on the issue. At the same time, the research has shown that producers are aware that high price constitutes a barrier of demand for their products, which was also reflected in the question concerning difficulties encountered by producers during sales (Fig. 3). Almost half of the surveyed producers found that it is relatively high price of the organic products offered by them (in comparison with conventional products). This is the result, e.g., of higher costs related to implementation and performance of such production, including certification, as well as smaller scale of production. Among barriers 30% of respondents has also highlighted difficult distribution. This is linked to the fact that the shelf-life of organic products is short and frequently, fast delivery to the customer is a prerequisite for their sale. On the other hand, 16% (10 persons) found difficulties in low demand for the products sold.

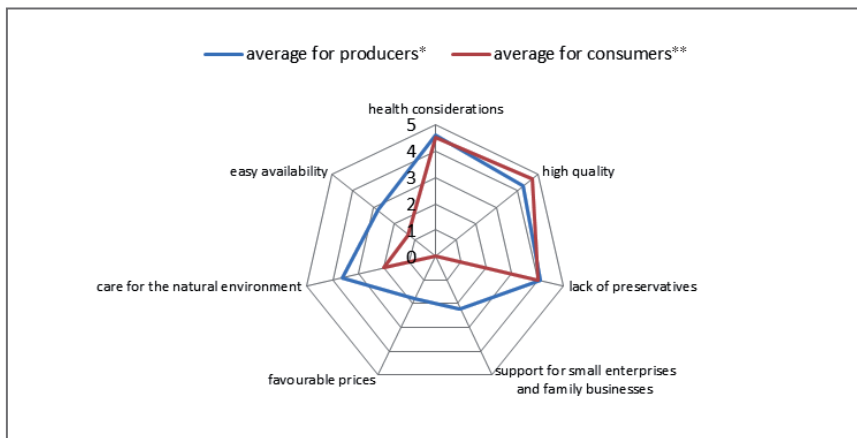


Fig. 2. Factors determining the purchase of the organic food in producers' and consumers' opinion. Source: own study based on the survey data, n = 62* and n = 168**.

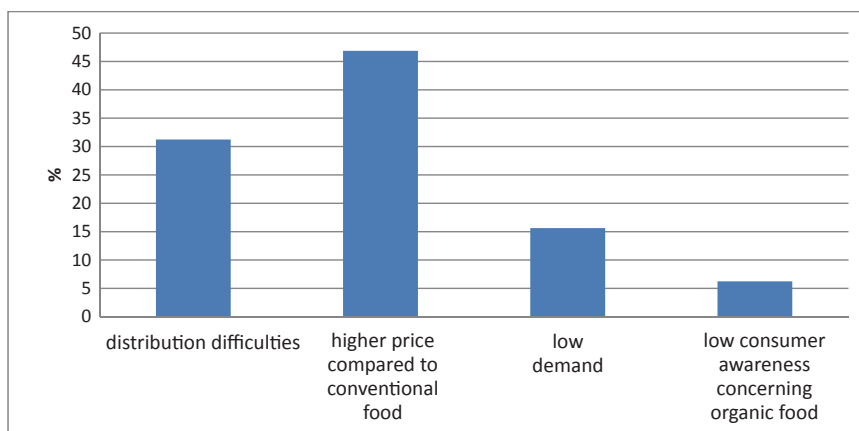


Fig. 3. The types of obstacles hindering organic products sale. Source: own study based on the survey data, n = 62.

Consumers were asked about the frequency of purchasing organic products. Almost half of respondents declared to purchase organic products several times a week (80 persons). The organic products were purchased several times per month by 71 persons and only 17 persons chose the answer “several times a year”. On the other hand, no one among respondents declared to purchase organic food every day. Taking into account individual product categories, the consumers pointed to very frequent and frequent purchase of ecological fruit and fruit preparations, milk and meat and their products, as well as vegetables

and vegetable preparations (Table 1). These are the basic food products underpinning the human diet. Organic confectionery and edible fats were purchased least often. This may be affected by the fact that these products are less available and, in addition, the consumers try to avoid them to protect their own health. In case of the confectionery, this may also result from the possibility to prepare them on one's own at home.

Table 1

Categories of organic products and frequency with which they are purchased by consumers

	Never bought	Occasionally (during trips, holidays)	Rarely (several times a year)	Frequently (several times a month)	Very frequently (several times a week)	Average ^a
meat and meat products	-	13	34	108	13	3.7
cereal preparations	13	54	76	17	8	2.7
milk and milk products	-	13	46	63	46	3.9
fruit and fruit preparations	-	9	50	59	50	3.9
vegetables and vegetable preparations	-	29	34	46	59	3.5
confectionery, sweets	113	55	-	-	-	1.3
edible fats	76	79	13	-	-	1.6
eggs	13	43	108	4	-	2.5
fish and fish products	8	50	108	-	-	2.6

^a weighted average of the surveyed features

Source: own study based on the survey, n = 168.

On the other hand, the producers were asked when they observed the increase in sales or interest in the food products offered by them. Almost half of respondents (30 persons) pointed to a close connection between advertising, especially direct advertising, and increase in products sale, which highlights the importance of the advertising in the sales process. The producers also pointed to increase in the consumers' interest in the Christmas period (15 producers). This may mean that consumers look for high quality products constituting the basis for the traditional dishes prepared in this period. Thirteen producers also noticed increase in sale in holiday period (long weekends, holidays, winter vacation). In this period, the potential consumers go for a rest to different regions of the

country and they are open to traditional products which very frequently include the organic products. This may also foster the direct purchases from the producer (at the point of manufacture). As Figure 4 shows, the point, where manufactured products are offered, was most frequently pointed by the surveyed producers. However, in case of consumers, this form of purchase was practiced occasionally. Both groups chose markets and bazaars as the places where organic products are frequently offered/purchased. Relatively small number of producers (15) sold their products – frequently and very frequently – through specialist shops which in turn were the most frequently indicated by the surveyed purchasers of the organic products. This form of distribution was indicated primarily by the producers of meat and meat products and by half of all producers of milk and milk products. Most likely, this is due to the fact that these products are the most demanding in terms of transport conditions and this, particularly, results from the way the products are stored and exposed.

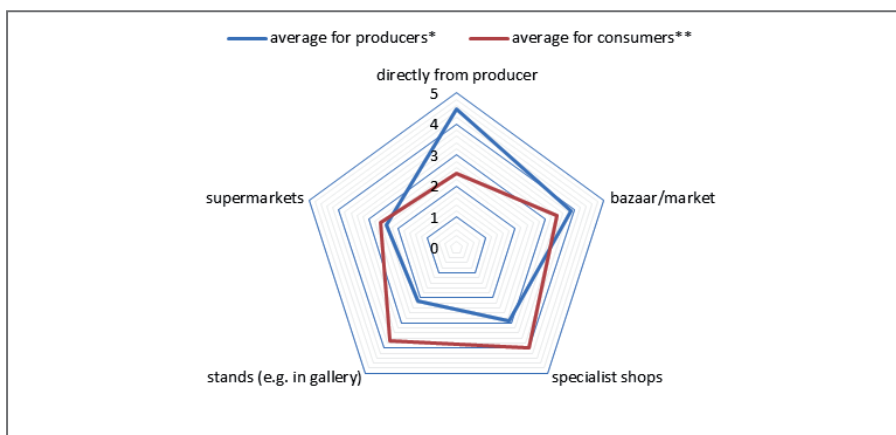


Fig. 4. Place where organic products are offered/purchased.

Source: own study based on the survey data, $n = 62^*$ and $n = 168^{**}$.

The opinions on sources for transfer/acquisition of information on organic products were also confronted (Figure 5). The producers declared that most frequently they inform their customers on products at bazaars and markets as well as Internet. This may be caused by relatively low costs of application of these communication forms. Only five producers chose the option of informing customers on products through television, radio and press. In addition, these sources of information were indicated by surveyed consumers least often. It should be added that specialist shops and friends were an important source of information concerning products for the consumers, which was not indicated by the producers.

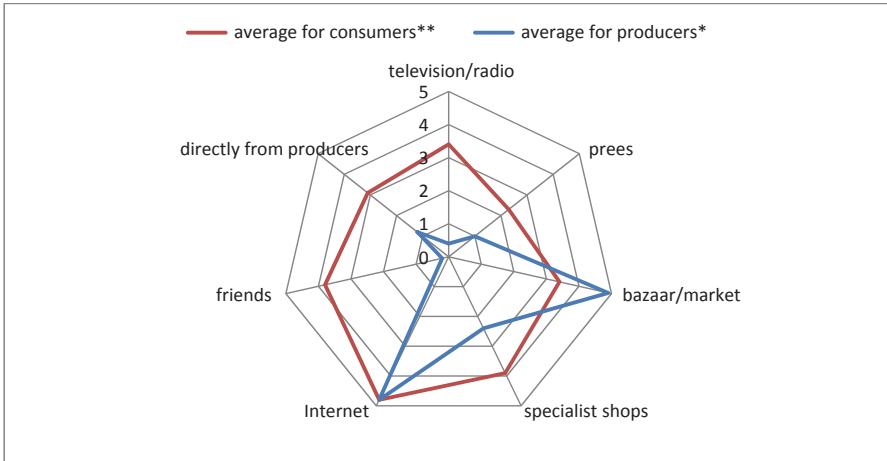


Fig. 5. Sources for transfer/acquisition of information on organic products. Source: own study based on the survey data, n = 62* and n = 168**.

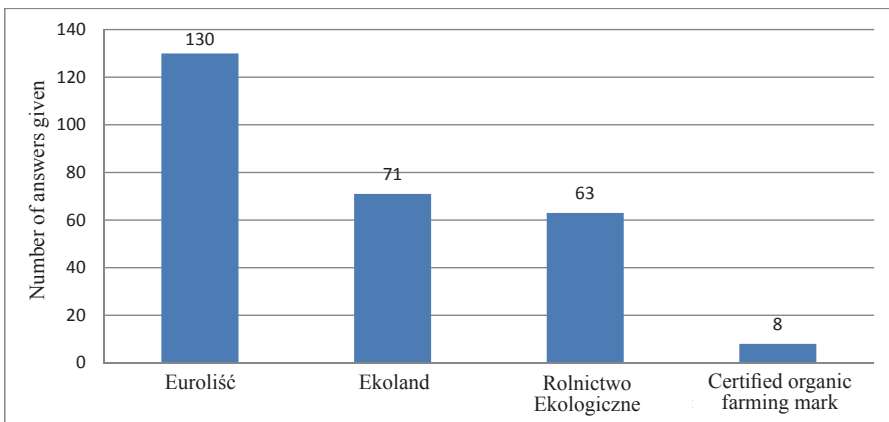


Fig. 6. Consumers' knowledge of the selected designation of organic products. Source: own study based on the survey, n = 168.

Consumers were also asked if they can indicate the organic products designations used in Poland (Fig. 6). All surveyed consumers indicated at least one designation. Most respondents (130 persons) mentioned “Euroliśc”. “Ekoland” designation which was indicated by 71 persons of all respondents, was ranked as the second most recognisable designation. “Rolnictwo ekologiczne” was another designation indicated by 63 persons, whereas 8 persons selected Certi-

fied organic farming mark. On the basis of an analysis of the answers given by surveyed consumers it can, thus, be concluded that the level of recognition of the designations is satisfactory. The producers' opinions regarding this issue were significantly different. Most of them (65%, i.e. 40 suppliers) considered that consumers do not recognise designations awarded to the organic products. According to the surveyed producers, this stems from relatively small number of programmes and events dedicated to organic food during which it is possible to purchaser to get acquainted with this kind of food and its designations. The producers expressed also the view that the consumer have problems in distinguishing organic products from conventional products. Only about 1/3 of the producers expressed belief that the consumer's knowledge on designation is adequate. This part of producers was of the opinion that the purchasers make informed purchasing decisions.

Summary and conclusions

The aim of the research was to compare consumers' and producers' opinions related to motives of their choice and elements of distribution and marketing of the organic products. The analyses which were carried out showed certain similarities and differences concerning these opinions. Undoubtedly, the similarities include the fact that both consumers and producers identified organic products with high quality and health-oriented advantages, in the first place. These factors were indicated by both groups as the key determinants of choice of these products by the purchasers. At the same time, the surveyed consumers identified organic products with high price. Higher price of the organic food compared to the conventional food was also indicated by the producers as the main barrier to product sales. Producers were also aware that support to individuals manufacturing organic products and environmental protection are not significant purchasing motives for the customers, while in case of producers, the scores of these motives were higher than in case of consumers. Therefore, the support for producers and environmental protection were less important for consumers than for the surveyed producers. Nevertheless, it can be concluded that both groups of respondents identified the purchasers' choice of organic products more with the unit benefits than with a social welfare which includes care for the natural environment and support for incomes of the agricultural producers oriented on this type of production. At this stage of the development of the organic food market, promotion of the positive effect of this type of food on health in producers' information actions may be their chance to overcome barrier of demand for the manufactured products. This is even more important given that the trend of health and physical state care is developing in the society.

Dissonance between purchasers and producers is visible in the opinions concerning designations of the organic products. People purchasing organic products at the markets showed satisfactory level of recognition of designations

of these products, however, this was not reflected in producers' opinions on this subject. The purchasers' ability to recognise the designations should be an incentive for the producers to achieve such designations as this improves positioning of the product on the market. Consumers who are familiar with products' designations may look for new products with more confidence, being sure about their authenticity. In addition, this can contribute to increase of the consumers' acceptance level concerning higher prices of the organic products.

Differences may also be observed when comparing consumers' expectations regarding places where organic food should be available and places where such products are offered by the producer. The surveyed producers most often offered their products directly at places of their production, as well as at markets and bazaars. On relatively rare occasions they delivered products to specialist shops which were frequently and very frequently chosen by the consumers. At the same time, the consumers surveyed while shopping at the market also chose supermarkets as places for purchasing the organic products, which may indicate that they sought products at the lowest prices possible. This may be a guideline for the producers suggesting that they should also consider the sale of their products in such kind of stores. Undoubtedly, this would ensure reaching out to a wider audience. When shopping in specialist shops and at bazaars and markets, the surveyed consumers frequently gained information on the organic products. However, most frequently, they used the Internet for this purpose, which was also indicated by the producers. It can, therefore, be concluded that the producers understood that this source for transfer of information on the products is effective and it requires smaller funds than traditional promotion activities.

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PRODUKTY EKOLOGICZNE W OPINII PRODUCENTÓW I KONSUMENTÓW – STUDIUM PRZYPADKU

Abstrakt

Rozwój rynku żywności ekologicznej jest następstwem zmian zachodzących we współcześnie występujących modelach konsumpcji oraz wzrostu jej podaży. W artykule podjęto próbę odpowiedzi na pytanie, czy nabywcy i sprzedawcy podobnie oceniają czynniki warunkujące wybór i postrzeganie produktów ekologicznych, jak również elementy związane z ich dystrybucją i marketingiem. W tym celu przeprowadzono badania ankietowe wśród uczestników odbywającego się w Poznaniu „Zielonego Targu”. Jak wynika z przeprowadzonych badań zarówno konsumenci, jak i producenci jednakowo utożsamiają produkty ekologiczne z wysoką jakością i prozdrowotnymi walorami. Cechy te wskazywali też najczęściej jako główne determinanty zakupu tych produktów. Różnice w opiniach ankietowanych grup dotyczyły natomiast znajomości oznaczeń i miejsc zakupu/oferowania żywności ekologicznej.

Słowa kluczowe: rynek produktów ekologicznych, konsumenci, producenci, badania ankietowe.

Accepted for print: 15.12.2017.