

Country Report Organic ————— 2023

CZECH REPUBLIC



Report on the Status of Organic Agriculture and Industry in Czech Republic

Gefördert durch



aufgrund eines Beschlusses
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Imprint

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Disclaimer

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This report has been prepared to the best of our knowledge and belief. We cannot however accept any guarantee for the accuracy, correctness or completeness of the information and data provided.

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Czech Republic: Figures, Data and Facts

Map

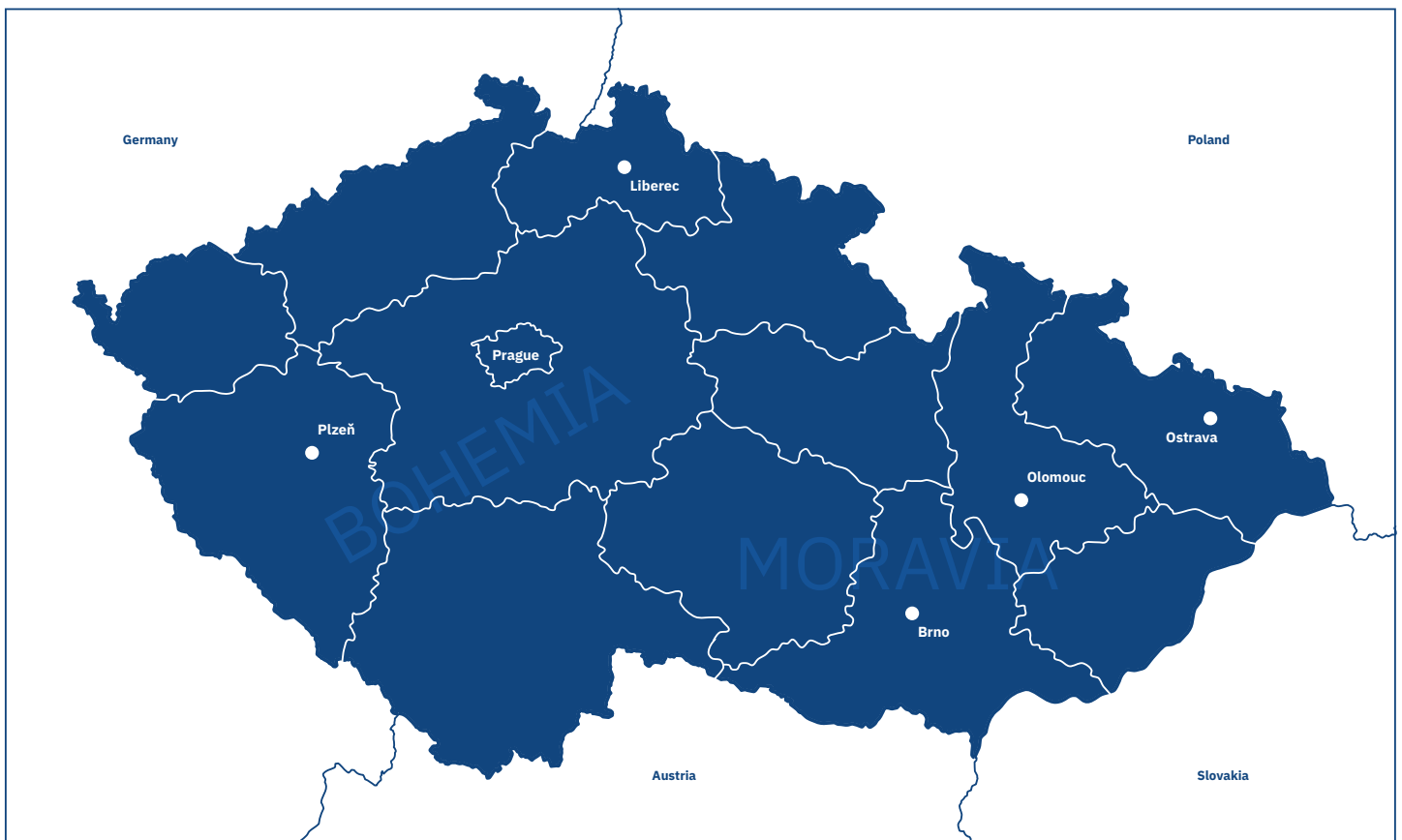


Figure 1: Map of Czech Republic

Czech Republic is a country in Central Europe with about 10.7 million inhabitants. It consists of the historical lands of Bohemia (Čechy) and Moravia (Morava) and parts of Silesia (Slezsko). The country borders Germany to the west, Poland to

the north, Slovakia to the east and Austria to the south. The capital of the country is Prague (Praha in Czech), other major cities are Brno, Ostrava, Plzeň, Liberec and Olomouc.

Country Statistics

78,867 km²

Land area

10.7 Mio.¹

Population (2023)

42.8 years²

Average age of the population

Czech crown CZK Kč³

Currency

Economic Situation

654.625 CZK Kč

GDP per capita (2022, nominal)⁴

42.9 %

National debt (% of GDP, gross, 2022)⁴

2.7 %

Unemployment rate (2021)⁴

37.903 CZK Kč

Average wage gross, CZK Kč. / Month, annual average (2021)

15.6 %

Inflation rate (2022)

3.3 %

(Inflation rate 2021)

Trade Relations

- WTO membership: yes, since January 1, 1995
- Free trade agreement: The Czech Republic benefits from EU free trade agreements as part of its EU membership. Currently, there are agreements with 77 countries; further free trade agreements are currently being negotiated. For an overview of the agreements see www.wto.org (↗).⁴
- Membership of Customs Union: EU, since May 1, 2004

1 The data of the population of Czech Republic: (↗)

2 German-Czech Chamber of Industry and Commerce, 2022

3 1 Kč = 100 Heller, 1 € = 23,77 Kč (March 2023), 100 Kč: 4,21 €

4 Cf. GTAI Economic Data Compact Czech Republic (November 2022)

EU-relationship with Czech Republic (2019–2021 | bn euros)

	2019	%	2020	%	2021	%
Import of the EU	130.7	2.3	121.5	- 7.0	141.5	16.5
Export of the EU	115.6	0.8	106.4	- 8.0	126.7	19.1
Saldo	- 15.0		- 15.1		- 14.8	

Figure 2: EU27 foreign trade (deviations due to rounding)

Germany's relationship with Czech Republic (2019–2021| bn euros)

	2019	%	2020	%	2021	%
German Import	47.7	0.1	43.8	- 8.2	49.7	13.6
German Export	44.5	0.5	39.6	- 11.0	47.3	19.5
Saldo	- 3.2		- 4.2		- 2.5	

Figure 3: Foreign trade (deviations due to rounding)

German imported goods by SITC (2021⁵ | %)

Electronics	16.8
Chemical production	12.4
Machinery	10.7
Electrical engineering	9.8
Motor vehicles and parts	8.8
Food products	4.5
Iron and steel	4.4
Metal goods	3.7
Textiles / clothing	3.4
Nonferrous metals	2.4
Others	23.1

Figure 4: German import goods by SITC (% of total imports)

Main supplying countries (2021 | %)

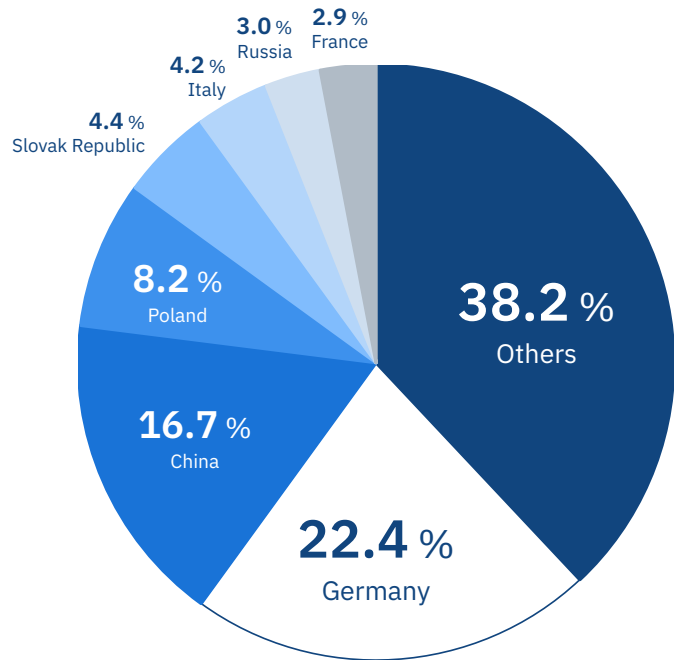


Figure 5: Germany Trade & Invest, 2022

Main consumer countries (2021 | %)

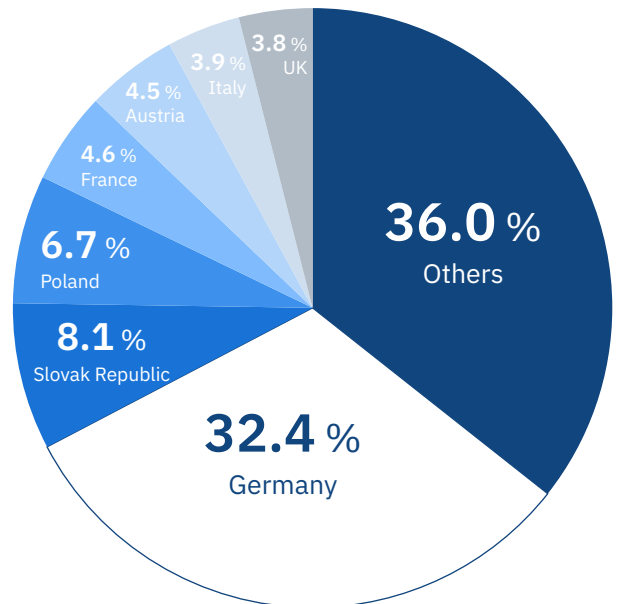


Figure 6: Germany Trade & Invest, 2022

⁵ See *ibid.*

Comparison Germany, Czech Republic and EU 27 (2021–2022 | km² | %)

Agriculture, forestry, fishery		Year	Czech Republic	Germany	EU-27
Agriculture, forestry and fishery	% of gross value added	2022	2.3	1.2	1.9
Organic farming	% of the agricultural area	2022	16.06*	11.3 ⁶	9.1 (2020)
Logging	1.000 m ³	2021	-	82 411	507 260
Fishing	Tons	2021	-	157 144	-

Figure 7: Comparison Germany, Czech Republic and EU 27⁷

Climate

For the most part, the Czech Republic still belongs to the Central European temperate climate zone; winters are relatively mild, summers not too hot. Due to the small difference in geographic latitude, the altitude difference is the most important factor of climate variability. The average air temperature on the highest mountain of the Czech Republic (Schneekoppe) is 0.5 °C, while in the

lowlands of southern Moravia it is 10 °C. The annual precipitation ranges from 450 mm in Bohemia to 2000 mm in the mountains. The average temperature in July is 20 °C, in January -2 °C. The vegetation period lasts 200 days in the south, but less than 100 days in the mountains.

Land Use

The Czech Republic has a total area of 78,870 km². Of the 78.6 thousand square kilometers of land, 35 % is

covered with forests (27.352 km²) and 2 % with water (1,650 km²). 11 % are other areas: 8,486 km².⁸

Utilised agricultural area at 20 March

70 % of the utilised agricultural area is arable land: 2,481 thousand ha. In 2022 the area of permanent grassland decreased by 2,815 ha.

* eagri.cz 13-03-2023

7 (↪)

8 (↪), 1 km² = 100 hectares

Utilised agricultural area (2021–2022 | ha | %)

	2021	2022	Difference (+, -)	Index (%)	Share 2021 (%)
Utilised agricultural area	3,529,797	3,530,423	627	100.0	100.0
Arable land	2,476,913	2,481,225	4,312	100.2	70.3
Fallow land	24,780	25,658	878	103.5	0.7
Hop gardens	5,601	5,595	- 6	99.9	0.2
Hop gardens in production	4,988	4927	- 61	98.8	0.1
Vineyards	17,464	17,448	- 16	99.9	0.5
Vineyards in production	16,484	16,547	62	100.4	0.5
Gardens	595	1,289	694	216.6	0.0
Orchards	15,999	15,419	- 580	96.4	0.4
Permanent grassland	1,005,525	1,002,710	- 2,815	99.7	28.4
Other permanent crops	7,700	6,738	- 962	87.5	0.2

Figure 8

In the case of livestock farming in the Czech Republic, the number of cattle and cows has increased. Poultry farming

has declined sharply, both in terms of the number of heads

Livestock (2020–2022 | heads)⁹

Period	Cattle	Cows	Pigs	Sows	Sheep	Poultry	Hens
2020	1,404,117	585,897	1,499,307	87,710	203,612	24,247,371	8,502,347
2021	1,406,430	585,904	1,518,402	90,477	183,145	23,808,531	8,148,644
2022	1,421,254	587,859	1,432,824	80,756	174,196	23,026,197	7,624,998

Figure 9

⁹ Since 2002, livestock Survey have been reported only for the agricultural sector.

The Organic Sector in the Czech Republic

More than 30 years ago, a few pioneers laid the foundations for organic farming in the Czech Republic. Membership in the European Union – since 2004 – has significantly supported the development of the organic sector. Only about one third of the producers are members of the Pro-Bio Association in CZ.

History

Organic agriculture has already had a 30-year development in the Czech Republic. At the very beginning of the development of organic agriculture in 1990, four independent farming associations were founded (and the fifth in 1991), but their constellation remained constant only for a short time.

The Altervin, Biowa and Naturvita associations merged into the Pro-Bio association. Among the pioneers are Ing. Jiří Urban, Ing. Martin Hutař, Otakar Jiránek und Ing. Petr Trávníček.



Figure 10: Ing. Jiří Urban



Figure 11: Ing. Martin Hutař (r.)



Figure 12: Otakar Jiránek

National Legal Frame

All farmers, producers and distributors of organic food, importers from third countries, producers of feed and propagation material within the framework of organic agriculture are obliged to work in accordance with the Czech Act on Organic Agriculture and EU Regulation (EU) 2018 / 848.

Since 1993, there are state-approved organic standards and a state organic logo, also called **Organic Zebra**, issued by the Ministry of Agriculture.

The guidelines for the label are anchored in the Czech Law No. 242 / 2000. The **Organic Zebra** is mandatory for all organic products certified by Czech inspection bodies and marketed in the Czech Republic. Imported products do not have to carry the zebra. Even after the introduction of the EU logo, the organic zebra remains on the products, although it contains the same information for the consumer as the EU logo.



Figure 13: State logo for organic food in the Czech Republic Organic zebra

Register of Organic Enterprises

According to the current European and Czech legislation on organic farming, all enterprises producing organic products, organic food, feed and seeds, as well as bee-keepers, fish farmers, mushroom growers or game collectors, traders, importers and exporters must be registered in the **Register of Organic Entrepreneurs (ROE)**, which is kept at the headquarters of the Czech Ministry of Environment.

This application provides the public with data on organic farming enterprises registered by the Ministry of Agriculture in accordance with Act No. 242 / 2000 Coll. on Organic Farming. Only enterprises whose registration is still valid are displayed. A prerequisite for such labeling is the existence of a certificate for the specific products issued by the competent inspection body based on the results of an annual inspection. ([↪](#))

Action Plan for the Development of Organic Agriculture in the Czech Republic

According to the current European and Czech legislation The current **Action Plan of the Czech Republic for the Development of Organic Agriculture in 2021–2027** (hereinafter referred to as **APEZ**) aims to support the growth of organic agriculture in the Czech Republic by 2027 and is the fourth in this series. Other specific goals include achieving at least 22 % of total agricultural land, a 30 % share of arable land of total organic land, 4 % market share of organic products in total food consumption.

Info

Labeling info

www.lovime.bio/poznat-bio/kdo-ruci-za-bio

tion, and 5 % market share of organic products in out-of-home catering (Horeca).

The action plan points out that there are differences in performance between different organic farms and therefore the efficiency of management of existing organic farms needs to be improved, thus strengthening their competitiveness. According to APEZ, a number of factors contribute to the situation described above: lack of advice, low uptake of innovations and research results, lack of professionals trained in organic agriculture, complicated marketing and so far volatile demand for organic products from processors.

The APEZ builds on the new European Action Plan for Organic Agriculture and is also in line with its stated priorities. The action plan is also in line with the objectives of the EU's Common Agricultural Policy and the European Commission's "From Producer to Consumer" and "Biodiversity" strategies published as part of the "Green Deal for Europe".



Figure 14: Action Plan for Organic Agriculture 2021–2027

Support Instruments

The aim is to promote environmentally friendly farming systems and to increase the share of organic farming in the agricultural area cultivated under the transitional regime or the regime for organic farming, with the agricultural crop types of permanent grassland, normal arable land, grassland on arable land, permanent crops fruit growing, viticulture and hop growing.

New: partial conversion also possible from 2023. Farmers are now required to attend training on appropriate practices in organic agriculture at least once during the commitment period. The measure is implemented in the form of five-year commitments. Under the organic farming measure, it is now possible to farm conventionally in parallel.

Applicants can only be a farmer and a registered organic farmer farming at least 0.5 ha of agricultural land registered in the LPIS.

Scope of support at the level of beneficiaries, subsidy amount (2023 | EUR/ha)¹⁰

	Transition to OF	Maintaining Organic Farming
Basic grassland management	106	100
Cultivation of grasses and perennial forage crops on arable land	137	120
Vegetables, herbs, potatoes & Strawberry plants for farmers cultivating up to 6 ha	660	638
Cultivation of other crops	323	239
Intensive orchards	896	850
Vineyards	900	847
Hops	900	847

Figure 15

¹⁰ Calculation is made in CZK, for conversion to EUR the exchange rate 26,5 CZK / EUR is used. Support for agroforestry is not connected with organic farming. ([↪](#))

Associations and Marketing Organizations

Association membership plays only a limited role in the Czech Republic today; most farms operate according to EU guidelines. The associations essentially serve organic farmers as a representation of their interests.

PRO-BIO is the oldest organic association in the Czech Republic. The head office is in Šumperk in North Moravia. In 1992 the Association of Organic Food Producers and Processors PRO-BIO was founded. PRO-BIO Association of Organic Farmers (ID No. 69601267) was established on 25 May 1999 and exists till today.

In 2022 the association PRO-Bio counted 573 members, of which 464 farmers, 49 processors, 16 wholesalers, and 32 grocery stores. The agricultural area under management in 2022 was about 84 491 ha, which is 15 % of the total organic area. About 10 % of organic farmers are members of Pro-Bio. The association supports its members with information, advice, service, sales promotion, advertising and interest-free bonds. Pro-Bio is active nationwide and maintains 11 regional centers.

The Pro-Bio Association has two affiliated associations – the Association's organic stores (1996) and the Pro-Bio League (2002). The Pro-Bio League is engaged in educating the public about organic food and organic farming, doing public relations and organizing the traditional annual bio-fair in Prague. Like the Pro-Bio Association, the Pro-Bio league is one of the actors in the development of organic agriculture in the Czech Republic, a member of the Czech Technology Platform for Organic Agriculture and a member of the Commission for Organic Agriculture under the Action Plan for Organic Agriculture .

Map of Points of Sale of Organic Products Organizations

Pro-Bio league performs under the brand name **Lovíme.bio** and is responsible for the content of the website www.lovime.bio ([↗](#)) and maintains a map of where organic food could be sold, especially from farms and local shops www.kde.lovime.bio ([↗](#)).

Two companies emerged from the Pro-Bio association:

- 1. **Pro Bio GmbH** (importer, wholesaler and processor in 1992. In the company PRO-BIO the Association of

Organic Food Producers and Processors had ca 16 % share (20 000 out of 120 000 CZK until 17 October 2001). Now there are only 2 partners Martin Hutař and Karel Matěj holding shares in this company.

- 2. **Prodej-Bio GmbH** (raw material trader and exporter). Prodej-Bio GmbH was founded by Pro-Bio Association in cooperation with BIOLAND in 2008 and is 100 % sole shareholder.

The Association also organizes an annual competition for the Best Organic Food of the Year ([↗](#)).



Figure 16: Award of the „Best organic farm of the year 2022“ to family Adolf Loos from Hora St. Kateřina by the Pro-Bio Association

The majority of winegrowers registered in the **EKOVIN Association** (Association for Integrated and Organic Grape and Wine Production O.S.) have vineyards in the integrated production system. The Ministry of Agriculture (MZE) supports the conversion from integrated production to organic viticulture and fruit growing within the Rural Development Program.

Organic wine production is defined in the “Guidelines of the Union for Integrated and Organic Grape and Wine Production”. These guidelines are issued by the Union for Organic Viticulture and approved by the Ministry of Agriculture of the Czech Republic. The guidelines are based on the internationally applied “Minimum Requirements for Organic Viticulture Systems”,

Info

PRO-BIO Association

www.pro-bio.cz

www.facebook.com/svaz.pro.bio



which were developed by leading experts from the member countries of the European Union within the **ORWINE project**.¹¹

BIOSAD is an association whose mission is to promote the development of organic fruit growing in the Czech Republic. Its activities are focused on providing information to farmers who specialize in the production of high quality and healthy fruit.

Members include not only organic fruit growers, but also producers in integrated cultivation, as well as representatives of research, the Fruit Growers Association and others.

In autumn 2019, seventeen farms from the Czech and Slovak Republics joined together to form **Demeter Czech Republic and Slovakia**. In the summer of 2020, the association was accepted into the worldwide family of the Biodynamic Federation – Demeter International. The number of members is gradually growing. At the beginning of 2022 there are 35 farms, which together cultivate about 8,000 ha. 60 % of this area is already Demeter certified or in the process of so-called conversion to Demeter.

Živé zemědělství is the magazine of DEMETER in CZ and brings the most important and latest findings from the world of ecology and biodynamics.

Subscriptions to the magazine can be ordered at zive.zemedelstvi@seznam.cz (↗).

Organic Certification

There are four accredited inspection bodies in the Czech Republic. They are private companies that are under the control authority in the Ministry of Agriculture, Department of Environment and Organic Agriculture. All control areas, i.e. A, B, C and D are covered. The control organization **KEZ** has carried out a total of 2580 controls in 2022, covering 60.38 % of the area. **BIOKONT** is in the second place with 2453 controls, but with a much smaller area, which gives a share of about 25.33 % as of 09.03.2023 (↗).

Notes: Most organic operators have a contract for inspection and certification with only one control body but it is possible that some operators have a contract with several control bodies at the same time (with each KO for a different type of activity). Therefore, the total number of operators in this statistic may not correspond to the total number of organic operators in the Number of organic operators' statistic.

The 'No KO' column includes entities whose control and certification contract has expired and which will

shortly contract with another control organization or request cancellation of registration.

The area of land in the Organic agriculture (EZ) / PO is the sum of the land registered in the LPIS. LPIS is a geographic information system (GIS) that consists primarily of records of agricultural land use. LPIS was created on the basis of Act No. 252 / 1997 Coll. on Agriculture at the turn of 2003 and 2004. It was launched on 21 March 2004. (↗)

It does not include land registered only according to the Land Registry.

The Ministry of Agriculture (MoA) monitors compliance with organic farming regulations. It authorizes the inspection bodies, which carry out regular inspections of all organic enterprises. The Ministry regularly monitors the activities of the control bodies. At least once a year, an inspection takes place at the inspection body's headquarters, and throughout the year, the inspection bodies' inspectors continue to be monitored as they carry out their inspections. (↗)

Research and Consulting

In the Czech Republic there is no official advice of the state in organic farming. The new support period of the Common Agricultural Policy in Europe (CAP) came into force on January 1, 2023 and lasts until 2027. There are still two pillars, with 25 % of the budget for direct payments being spent on the so-called "Eco schemes". In the Czech Republic, as of 2023, it is planned that consultants will have to be accredited with the Ministry of Agriculture, stating their consulting services. Farmers can ask for expert advice from various advisory organiza-

Info

BIOSAD

www.biosad.cz



DEMETER Czech Republic and Slovakia z.s.

www.demetercs.eu



¹¹ Final Report Summary – ORWINE (Organic viticulture and wine-making: development of environment and consumer friendly technologies for organic wine quality improvement ...) (↗)

Organic certification in the Czech Republic (2023 | ha | %)

Control Organization	Number of Subjects	Land area in Org. Agr. (EZ) (ha)	Land area in transition (PO) (ha)	Total	
KEZ o.p.s.	2,580	318,996.7	24,594.72	343,591.42	60.38 %
Biokont CZ, s.r.o.	2,454	127,750.05	16,886.65	144,636.7	25.42 %
ABCERT AG, organizational unit	1,114	69,268.83	10,565.44	79,834.27	14.03 %
BUREAU VERITAS CERTIFICATION CZ, s.r.o.	81	434.69	120.62	555.31	0.10 %
Without KO	82	373.45	90.5	463.95	0.08 %
Total	6,311	516,823.72	52,257.93	569,081.65	100.00 %

Figure 17

tions, such as Czech Organics, and receive a financial subsidy from the state of up to 80 % of the advisory costs. Prior to this, the Ministry of Agriculture checks whether the consulting services have been carried out as ordered. The funds are then paid out.

Consulting Organizations

Institute for Agricultural Economics and Information (IAEI) is the expert center for agricultural economics, nutrition, agricultural extension and information. In 2012, the Institute celebrated its 100th anniversary. Advisory services in the field of organic agriculture for the general public are provided by the PRO-BIO Advisory Center in the form of certified ADVIGREEN advisory services. The main objective of the ADVIGREEN certification system is to ensure the quality of agricultural advisory services.

The owner of the certification system is IAEI – its use is enabled by concluding a contract on the use of the certification system and compliance with the conditions for the use of the certification system. PRO-BIO Advisory Center provides advisory services in the field of agriculture, food and feed production and other areas related to agriculture in accordance with the current legislation as amended. The management system of the advisory service is carried out in accordance with the Quality Manual of the Advisory Center.

Czech Organic offers comprehensive, tailor-made consulting in the field of organic agriculture and is involved in research on organic agriculture. The aim is to support the latest findings of agricultural research in their implementation in practice. This is done through publications, translations, lectures, articles and creation

of videos and visual material.

Ekoporadnypraha.cz is an independent association of 9



Figure 18: Consultant for organic farming Jan Travníček, Czech Organics (right)

Info

IAEI - Institute for Agricultural Economics and Information

www.iaei.cz

Czech Organics

www.czechorganics.com

non-profit organizations providing eco-advice in the capital city of Prague. The association aims to contribute to the improvement of the environment and to introduce to the public a sustainable lifestyle. The results of science and research in the field of environment should be made known and sustainable development should be promoted. The association Ekoporadnypraha.cz has been operating since 2012, and its activities are coordinated by **Ekocentrum Koniklec**, o. p. s. The project is financially supported by the City of Prague.

Education and Training

Institute for Organic Agriculture and Sustainable Landscape Management (Bioinstitut), o.p.s. (non-profit company), based in Olomouc, was established in 2004 to provide an umbrella for research and educational activities in the field of Czech organic agriculture and in Central and Eastern Europe. Co-founders and partners are the Research Institute of Organic Agriculture FiBL, the Czech Association of Organic Farmers PRO-BIO and Palacky University Olomouc, Czech Republic.

Development of organic agriculture through consultancy; transfer of scientific knowledge and research results into practice; educational, training and publication activities; promotion of the sector to professionals and the public; communication needs of the sector to the national administration. The Bioinstitut is the coordinator of the Czech Technology Platform for Organic Agriculture and a member of FiBL International – an international association of research institutions in the field of organic agriculture.

The textbook contains detailed information on the prac-

tice and theory of organic farming. The chapters deal with the history and methods of organic farming, landscape management, soil, plant nutrition, animal production, breeding of livestock breeds, etc. The textbook is suitable for students specializing in organic agriculture in a foreign language.

Farmářská škola, since 2019, there has been an initiative in the Czech Republic that specifically seeks to train young people to become organic farmers. With the support of various organizations and foundations – among them the Software Foundation, the Mahle Foundation and the non-profit organization Association **AMPI** (↪) – it was achieved that from the fall of 2023 Farmářská škola is recognized by the state as a “Higher Technical School for Organic Agriculture”.

The technical school is in the premises of the **Research Institute of Crop Production, v.v.i** in Prague. Theoretical lessons take place there and on the farms. (↪)

Practical relevance plays an important role. A total of 40 farms, including some certified DEMETER-farms, offer the opportunity to deepen a wide range of topics. The study program consists of three years of practical

Info

Ekoporadnypraha.cz

www.ekoporadnypraha.cz

www.facebook.com/ekoporadnypraha.cz



Ekocentrum Koniklec

www.ekocentrumkoniklec.cz



Institute for Organic Agriculture and Sustainable Landscape Management

www.bioinstitut.cz/en/home-en



Farmářská škola

www.farmarskaskola.cz



AMPI

www.asociaceampi.cz

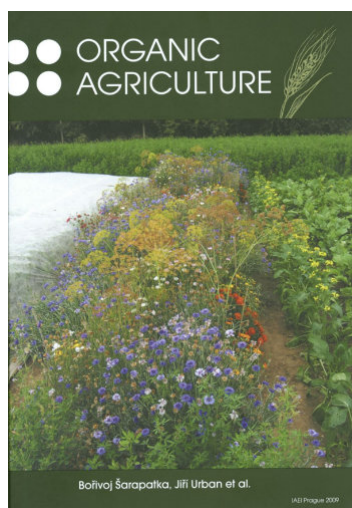


Figure 19: „Organic Agriculture“, Author: Jiří Urban and Bořivoj

work on selected organic farms in the Czech Republic and abroad (at least 800 hours per year) and theoretical modules led by experts in the field. This concept is mainly inspired by the German training in organic farming. A training advisor is available for farmers and farms and the farm managers meet annually for training.

Graduates can obtain the Diploma Specialist in Organic Agriculture (DiS).



Figure 20: School director Jiří Prachař (right) with Vice Minister of Agriculture Ing. Miroslav Skřivánek, PhD, (Eko farma Branná)

Info

List of participating training farms

www.farmarskaskola.cz/nase-farmy

Organic Farming

In 2022, the share of organically farmed land is 16.06 %.

The Czech Republic is one of the leading countries in Europe with 570 thousand hectares of organic land. In the current “Action Plan of the Czech Republic for the Development of Organic Agriculture in 2021–2027” the following goals are issued: achieving at least 22 % of total agricultural land and a 30 % share of arable land of total organic land.

Development of agricultural area and number of farms in organic farming (2010–2022 | number | ha | %)*

Year	Number of organic farms	Organic acreage (ha)	Share of total agricultural area (%)	Annual change Number of organic farms (%)
2010	3,517	448,202	10.55	30.8
2015	4,115	494,661	11.74	5.9
2016	4,243	506,070	12.03	3.1
2019	4,690	540,993	15.22	1.8
2020	4,665	543,252	15.28	- 0.5
2021	4,794	558,124	15.71	2.8
2022*	5,078	570,591	16.06	5.6

Figure 21

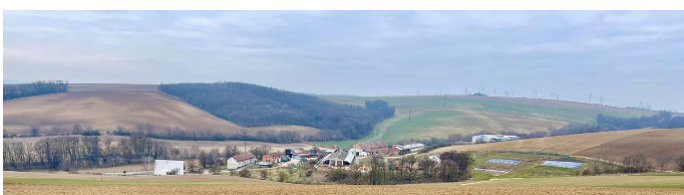


Figure 22: PROBIO Farm

Certified Farms and Areas

In March 2023, 5,078 organic farms including farmers in transition are certified. 235 of which are also processors.



Figure 23: Biofarma Sasov

* eagri.cz 13-03-2023



Figure 24: Sausage from uncastrated boars, Biofarma Sasov

Number of organic operators (2023)¹²

Total number of organic operators	6,311
Environmental operators s by type of activity	Number
Organic farmer	5,078
Organic food producer	991
- of which: Farmer processor	235
Distributor	1,178
- of which: Importer from 3rd countries	364
- of which: Exporter to 3rd countries	172
Producer or supplier of organic feed	7
Producer or supplier of organic reproduction material	89
Organic bee farmer	8
Organic fish farmer	18
Organic mushroom grower	6
Ecol. wild plant collector	24
Other	
Concurrency of selected activities	Number
Organic farmer who is also a distributor	190
A producer of organic food who is also a distributor	461
Organic farmer who is also an organic food producer	440

Figure 25

Organic agriculture in CZ (2023 | ha | %)¹³

Area by Crop	Area of land in Org. Agr. EZ (ha)	Area of land in transition PO (ha)	Total	
			ha	%
Arable land (R)	85957.8	18043.26	104001.06	18.28
Fallow (U)	121.61	91.82	213.43	0.04
Grassland (T)	420180.02	31443.96	451623.98	79.36
Grass on arable (G)	5003.16	1799.55	6802.71	1.20
Vineyards (V)	885.03	297.41	1182.44	0.21
Hops (C)	13.59	11.46	25.05	0.00
Orchard (S)	2888.07	254.73	3142.8	0.55
Other permanent crop (J)	1467.13	193.00	1660.13	0.29
Other crop (O)	226.50	109.33	335.83	0.06
Pond (B)	2.88	0.53	3.41	0.00
Nursery (K)	6.56	0.16	6.72	0.00
Wooded land (L)	4.23	0.00	4.23	0.00
Growing RRD (D)	45.14	10.42	55.56	0.01
Non-productive (M)	22.00	2.30	24.30	0.00
Total	516823.72	52257.93	569081.65	100

Figure 26

12 Legend: "Total number of organic entities": number of all organic operators with one or more active activities. Organic operator by activity type - number of active operators by activity type (one entity may have more than one activity type).

"Organic farmer": also includes farmers in transition.

"Farmed processor": organic food producer who is also an organic farmer or mushroom grower or beekeeper or fish farmer.

13 The area of land in the EZ / PO is the sum of the land recorded in the LPIS. It does not include land registered only according to the Land Registry. (↗)



Figure 27: Vineyard Milan Nestarec, South Moravia



Figure 28: Wide range of organic food

Processing, Production and Trade of Organic Products

It is interesting that in the Czech Republic some of the organic trading and processing companies run their own organic farms. In the Corona pandemic period from 2020 to 2022, e-shops have developed strongly.

Organic Certified Companies

In this chapter, only a few trading companies and processors of organic products can be presented:

PROBIO, SONNENTOR, Country Life and Lifefood.

The company PRO-BIO, trading company s.r.o. is the first Czech producer of organic food.

In 1992 two friends, Ing. Martin Hutař and Ing. Karel Matěj, decided to start a business with organic food and they founded a small company with the goal of supporting themselves and their first three employees. In the meantime, the company employs more than 100 people. From the very beginning, **PROBIO** focused primarily on the Czech market with its own products, gradually expanding its product range and supplying classic store shops to supermarkets. Supermarkets they supply under their own brand or pack in their private labels.

Since the foundation, almost 20 years, they have had little competition in the country. Customers knew about PROBIO mainly under the brands Biolinie and Bioharmonie. It is only in the last 5 years that they have developed the brand PROBIO due to increased competition. Other brands have been discontinued. The company started its production in PROBIO brand gradually from 2018.

The assortment of PROBIO includes over 1,500 items in organic quality and about 40 types of organic seeds (BIOOSIVA PROBIO). These are sold under different brands: own brands – PROBIO, BIOHARMONIE and BIO-LINIE as well as foreign products. In the offer you will find basic organic foods – from cereals, flour, legumes, pasta, mill products and oils to snacks such as biscuits, quick mixes, chocolates, wines or coffee.

They export their products to Poland, Slovakia, Germany, Romania, Lithuania, Slovenia etc. Part of their exports are agricultural commodities. Import – commodities only, if they are not grown in the Czech Republic or are in short supply.

In the company's own **e-shop**, all products, including eco drugs can be ordered conveniently. PROBIO operates 3 mills – a conventional and gluten-free mill in

Info

PROBIO

www.probio.cz



Staré Město and a mill in Jarcová, packaging plants and warehouses. One of the three mills is newly built and is 100 % gluten-free and co-financed by the European Union and the Czech Ministry of Agriculture. There are processed organic raw materials such as buckwheat, sorghum, chickpeas, red lentils, rice and others.

On 360 ha of arable land it has been growing for 15 years. Spelt, wheat, single grain, naked oats, clover incarnate for seed etc. Feeding of organic piglets approx. 500 pcs / year.



Figure 29: Gluten-free Mill in Jarcová



Figure 30: PROBIO owns an organic farm in South Moravia in Velké Hostěrádky.

Bioosiva: Organic seeds for growers, the seed and agricultural production purchasing department of PRO-BIO, s.r.o. offers a wide range of quality organic seeds of almost all commonly grown field crops. For spelt and wheat seeds they have exclusive rights for Swiss varieties bred biodynamically (Getreidezüchtung Peter Kunz).

The **Summer Festival** will take place in 2023 for the 16th time and it will once again be a festival of good food and drink prepared from basic organic ingredients.

Guided tours of the mills are planned again through the organic mills, packing plants and warehouses. Visitors will be able to see the entire production process from the milling of grain to the final packaged product. Video: ([↪](#))

In 2021 The PROBIO company became one of the 20 most climate-friendly companies according to the jury of European Seed magazine. The jury especially appreciated the 30-year cooperation with organic farmers as an example for sustainable farming systems. You can find out more on the seed platform's website: ([↪](#))



Figure 31: Prize from the European Seed Magazine, 2021

The story of the **SONNENTOR**¹⁴ brand began in 1988 with the idea of Johannes Gutmann, an unemployed young man from the poor Waldviertel region of Austria. He was a passionate supporter of organic farming at a time when the word “organic” did not yet exist. The SONNENTOR company is founder-managed and the products are available in organic specialty stores, pharmacies and health food stores and are distributed through organic wholesalers (and directly in Austria).

The online shop offers a wide range of tea, spices, sweets & delicatessen and much more.

Orders can be placed even faster via the “Order-lion” app. ([↪](#))

Info

Bioosiva

www.bioosiva.cz

14 Headquarters: Austria with sister companies in the Czech Republic and Romania ([↪](#)); Sister company in the Czech Republic ([↪](#))

Following the same principles – the ecological ones – Johannes Gutmann founded a subsidiary in Čejkovice / Czech Republic in 1992 in southern Moravia together with Tomáš Mitáček. The Czech company SONNENTOR initially began with the sale of fragrant essential oils and the cultivation of medicinal plants in organic quality, at that time exclusively for export. Gradually, however, interest in organic herbs grew, and health food stores also helped with the first sales. SONNENTOR introduced loose herbal mixtures and later also portioned teas to the Czech market. In 2009, Josef Dvořáček joined SONNENTOR and brought a lot of innovations to the business. A new store, a café, and a herbal, educational, and relaxation garden with a viewing platform were created. Meanwhile, the number of employees has grown to 180, making it one of the largest employers in the region.

The plant tours in the “Herb Paradise” and experience excursions into tea production are very popular.

A new building for processing and packaging will be opened in April 2023.



Figure 32: Co-founder Tomáš Mitáček and Sales Manager Václav Dvořák, both Sonnentor Czech Republic and Andrea Hrabalova, Lovime (from left) at BIOFACH 2023.



Figure 33: View of the filling station.



Figure 34: 300 tea bags are filled here per minute

Otakar Jiránek founded **Country Life** in the 1990s. He was previously a freelance photographer and discovered the world of organic food in 1980 in the south of France.

The headquarters of Country Life has been in Nenačovice near Beroun since 2003. There, the former cow barn was converted into a low-energy building. In addition, a new annex, the so-called “Ark”, a passive house, was built. There one can find all products of the wholesale offer in a showroom:

This “Archa shop” is designed for small purchases with no minimum purchase limit and offers a complete assortment of wholesale, fresh organic fruits, organic vegetables and organic bread from the bakery.

The wholesale warehouse has been located in Rudná near Prague since the beginning of 2016. Over 6,000 pallets can be stored on an area of 5,000 square meters. The assortment includes about 3,500 products, of which about 2,200 are organic: shelf-stable and refrigerated foods, fruits and vegetables, baked goods, organic cleaning products, organic and natural cosmetics.

Country Life’s “organic family” includes four organic and health food stores in Prague plus two vegan restaurants and a specialty store for organic and natural cosmetics.

Info

Sonnentor

www.sonnentor.com/de-at



Country Life

www.countrylife.bio



The first shop was opened in the early 1990s in Melantrichova Street / Prague.

The interior of the restaurant there was designed by architect Jiří Vorel.

Marketing via the company's own **e-shop** is becoming increasingly important. Meanwhile, about 10 % of organic products are sold through the e-shop. Orders can be placed via an app, B2B web platform, EDI, phone or e-mail.

Country Life published its own magazine **dobroty** about organic, good food and good life with a circulation of 60,000 copies until the end of 2022. Due to high production costs, the magazine was temporarily discontinued.



Figure 35: The first shop was opened in the early 1990s in Melantrichova Street / Prague. The interior of the restaurant there was designed by architect Jiří Vorel.



Figure 36: The store on Czechoslovak Army Street is one of the largest organic stores in the Czech Republic



Figure 37: In the restaurant you can find a selection in self-service, hot and cold vegan cuisine, the salad bar and fruit and vegetable juices.

Lifefood is a Czech company that has been a pioneer, leader and innovator in RAW FOOD in the Czech Republic and abroad since 2006. The company is a member of the **Rawfood Association**, which was founded as a non-profit association in December 2018 and awards the label "really-raw-Rawfood Association certified".

In the E-Shop you can find a wide range of products from Lifefood Oat Snack to Lifefood Sport and Superfoods.

Lifefood products are processed at temperatures below 45 °C to preserve all nutrients, vitamins, minerals and enzymes in their original natural quality. As Europe's largest manufacturer of processed raw food, Lifefood already distributes its high-quality raw vegan products in more than 20 countries. (↗)

Lifefood products contain 100 % organic ingredients and are certified by the control body ABCERT according to European standards. Suppliers are regularly evaluated and assessed according to very strict criteria. Lifefood products are vegan i.e. they are made exclusively from vegetable ingredients.

Info

lifefood

www.lifefood.de/de_de

www.instagram.com/lifefoodofficial



Rawfood Association

www.really-raw.de/en





Figure 38: Company founder Tereza Havrlandová (center) 2023



Figure 39: Stand of lifefood at the BIOFACH in Nuremberg

Import of Organic Products – Organic products in Supermarkets

Albert is the largest supermarket chain in the Czech Republic, with about 330 stores with – according to its own figures “the largest selection of organic products” (based on repeated research by Kantar CZ). Online survey from Q3 2020 with a sample of 2,500 respondents per year.

Organic products are sold under the “Nature’s Promise BIO” brand.

“By 2025, 100 % of the raw materials defined as critical raw materials in our private label products will come from certified sources”.

On the shelves of the supermarkets of Tesco, Lidl, Billa and Kaufland can also be found imported organic foods and own brands.



Figure 40: Organic label of the supermarket chain Albert: Nature’s Promise



Figure 41: Organic vegetables in the Albert supermarket in CZ

Info

Albert

www.albert.cz

www.albert.cz/naturespromise



Brands

Tesco organic

— Tesco

www.itesco.cz



Bio Organic

— LIDL

www.lidl.cz



BILLA Bio

— Billa

www.billa.cz



KAUFLAND Bio

— KAUF LAND

www.kauf land.cz



The Organic Market in Czech Republic

In recent years, the market for organic products in the Czech Republic has grown to 250 M €. Approx. 60 % are still imported.

Organic Food Supply

The first sales of certified organic products started in the spring of 1991 by Country Life with a wholesale and first retail shop. All the products were then imported. There was a very slow growth in the 90s through independent shops. An important growth occurred in the years 2005 to 2007.

After the “financial crisis” the growth resumed from 2012–2020. In 2021 was more or less a plateau and in 2022 there is a decrease, in average 20 %.

Distribution is depending a lot on imports: up to 60 % of organic products or ingredients are imported. The market is pretty much fragmented. There are a lot of small operators.

This means a consumption of organic food per capita of 23,5 € per year.

Share of the total food consumption: 1,8 %.

Weak points limiting the consumption of organic products:

- Higher price compared to conventional products,
- Small awareness about the benefits of organic products and production, small support from the state, ineffective campaigns.
- Too many logos used, they are logos for local products, farmer’s products, etc ... The consumer doesn’t know really the difference.

Market Volume

Prague is the main market for organic products: about 30 % of the market share.

Ca. 35 % of the population is buying organic products. The local consumption of organic food in the Czech Republic in 2020 was: 251,4 M EUR

Organic products market was constantly growing until 2021. The pandemic even accelerated the growth of the organic consumption against conventional products. In the category other processed food, BABY-FOOD is representing 38 %, plant based dairy alternatives 34 %.

There is still a limited offer from local production especially in the category of fruit and vegetables.

Consumption of organic products (2022 | %)

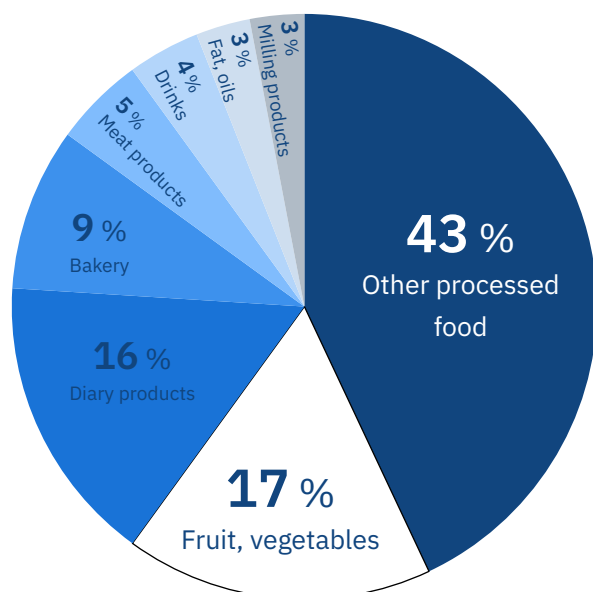


Figure 42: Germany Trade & Invest, 2022

Consumption and Export of Organic Food in CZ (2010–2020 | %)

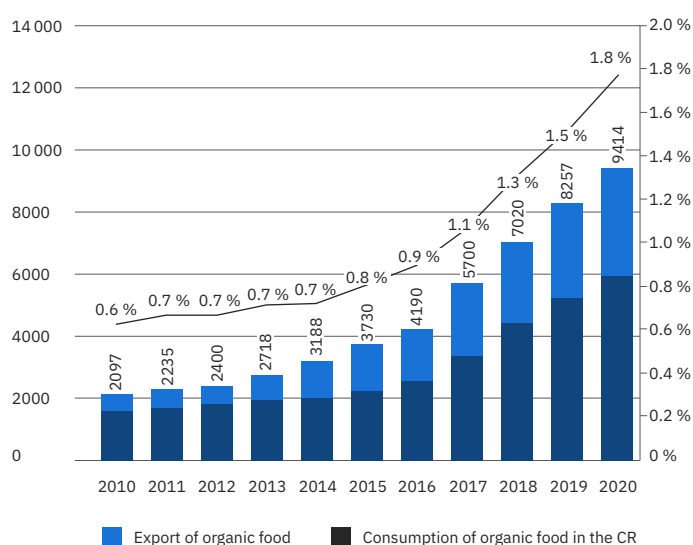


Figure 43

Market Volume

Some wholesalers such as **PROBIO** and **Country Life** as well as manufacturers such as **SONNENTOR** have established themselves on the market with their own brands and products.

In the following, some players will be presented. The most important domestic brands and products can be found under chapter D Processing, Production and Trade of organic products.

PROBIO



PROBIO Trade is a wholesaler / importer and processor, which achieves the highest turnover with exclusively organic food.

www.probio.cz



Figure 44: Selection assortment from PROBIO

Country Life



Country Life is a trading company in the Czech Republic, which sells a high proportion of organic food and cosmetics (own brand). This company operates in the organic market as a wholesaler / importer and retailer (5 shops) + 3 restaurants since 1991 plus E-commerce and distribution in Slovakia. The company also includes an organic farm and an organic bakery.

www.countrylife.bio



Figure 45: Baked goods from the Country Life bakery

BIO NEBIO



BIO NEBIO is a Czech company offering a wide range of high-quality organic food and health food products, from classics such as cane sugar, maple syrup, organic nuts or organic dried fruits to specialties such as organic Fairtrade chocolate, organic beer, organic agave syrup or organic cane sugar RAPADURA. There are own brand products as well as selected products from other brands.

www.bionebio.cz



Figure 46: Example from the BIO NEBIO assortment

BIOOO



BIOOO is a wholesaler / importer and retailer (5 shops) and sells cosmetics, cleaning products and organic food also via E-commerce.

www.biooo.cz



Figure 47: Example of the BIOOO assortment

Bio Basket



Under the name of **Bio Basket**, a network of subscription points has been established in health food stores and organic stores by customers all over the country. For customers, this has the obvious advantage that they can pick up their goods at the nearest pick-up point without shipping costs.

www.bio-basket.com

ECONEA



The Company **ECONEA** is a wholesaler / importer of cosmetics and cleaning product, selling also through E-commerce.

www.econea.cz



Figure 48: Example of ECONEA assortment

Organic Food Supply

Products of well-known brand manufacturers of organic food, cosmetics and drugstore goods can be found on all marketing channels in the Czech Republic.

The Czech Republic borders on Germany and Austria, which favors imports. Organic wholesalers as well as drugstores and supermarkets such as **Billa** or **Kaufland** sell organic products from e.g., **denree**, **Rapunzel**, **Beutelsbacher**, **Lammbräu** and **Sonett**.



Figure 49: Imported organic products from Germany in a Country Life store



Figure 50: Imported organic products from Germany in a Country Life store

Marketing channels and stakeholders (2012–2020 | %)

Sales point in the Czech Republic	2012	2013	2014	2015	2016	2017	2018	2019	2020	2020	
	Share of sales outlet in the Czech Republic (%)									Mio. CZK	Mio. Euro
Supermarkets / hypermarkets	49.7	48.3	40.9	46.2	43.9	40.5	36.2	35.0	32.0	1919	
Drugstores ¹⁵	18.0	18.7	16.5	14.7	17.9	17.5	14.9	15.2	14.8	888	
Health food and organic food shops	19.0	16.6	24.8	14.3	14.3	12.6	16.9	16.2	14.9	803	
Independent food stores	1.4	1.6	1.7	4.2	2.9	3.0	2.1	1.8	1.6	94	
Fare and other direct sales	5.9	8.9	6.7	7.0	7.3	5.4	5.1	5.7	6.1	366	
E-shops ¹⁶	x	x	3.4	7.8	6.7	14.1	12.3	15.2	22.2	1328	
Pharmacies	4.8	4.5	3.1	2.6	3.6	3.9	7.7	5.2	5.1	306	
Gastronomy	1.1	1.4	2.9	3.2	3.4	3.0	4.7	5.7	3.2	194	
Total¹⁷	100	100	100	100	100	100	100	100	100	5988	251.4

Figure 51

¹⁵ The share of drugstore chains has been retroactively adjusted for 2012 and 2013 based on a refinement of the methodology.

¹⁶ Due to the increase in sales through e-shops, which were previously part of the farm and other direct sales, the data for these categories are reported separately.

¹⁷ Due to rounding, the total may not correspond to the reported results for each category.

The mass market (Supermarkets / hypermarkets) is the n.1 purchase destination for the consumer with a market share of 32 %.

The share of E-shops has increased significantly in recent years. At 22.2 %, it is ahead of the Health food and organic food shops: 14.9 %.

Online supermarket **Kosik.cz** expanded its service to the whole of the Czech Republic.

In this portal you can order e.g. ALNATURA organic products. (↪)

Drugstores such as **dm**, **Rossmann** and others are also popular places to shop for organic products, both locally produced and imported.

- dm drugstore market: 239 shops + e-commerce
- E-commerce: +88 % from 01/10/2019–30/09/2020
- Fidelity card with 1.9 M clients
- Accent on eco-responsibility: 16 shops with bulk sales, certified organic, packaging 100 % recyclable

ROSSMANN has more than 166 stores in the Czech Republic with 14 new stores opening in 2022 and with an annual turnover of CZK 5.5 billion.



Figure 52: Own brands from dm



Figure 53: Import organic food from HiPP



Figure 54: Organic food for children with own brand

Alterra and **enerBiO** private label products were the first in the country to receive the international GREEN BRANDS quality seal for sustainable business.

The **ROSSMANN** drugstore chain was founded in Germany in 1972 by Dirk Roßmann. It currently operates more than 4,500 stores in 8 European countries and employs more than 60,500 people. **ROSSMANN** in the Czech Republic is a joint venture between Dirk Rossmann GmbH Germany and A.S. Watson Group. A.S. Watson is the largest health & beauty retailer with a global turnover of EUR 17 billion and 16,400 stores.



Figure 55: Own brand from Rossmann

Info

Kosik.cz

www.kosik.cz/alnatura?kampan=hp_top



dm

www.dm.cz



Rossmann

www.rossmann.cz



Opportunities and Risks

Although more people are again worried about their jobs, de facto full employment prevails. The official unemployment rate in 2021 was around 2.7 %. The shortage of skilled workers is keeping wages up. But high inflation rate of 15.6 % (2022) gnawed away all wage increases in real terms. Private consumption will grow at a more restrained pace as massive inflation restricts consumers' financial leeway.

As energy and shopping bills rise, consumer confidence is falling. In May 2022, it was at its lowest level in ten years, according to the statistic's office. In 2021, the gross average monthly wage was 37,903 Czech crowns, the equivalent of about 1,500 euros. The change in gross domestic product is estimated at 2.5 % in real terms for 2022. In 2020, economic growth by sector in agriculture / forestry / fisheries was still 6.5 %, real.

Potential for Trade

The new funding period in the EU's Common Agricultural Policy (CAP) offers opportunities for the further expansion of organic farming and processing, as well as trade. Consumption of eco-foods during the Corona pandemic from 2020 to 2023 has decreased. Sales via online stores and free delivery have increased. However, the higher price for organic products must be communicated to consumers in an understandable way. The current "Ac-

tion Plan of the Czech Republic for the Development of Organic Agriculture in 2021–2027" offers great opportunities to address these issues. Further expansion of organic agriculture in the Czech Republic should go hand in hand with the simultaneous development of the organic food market.



Figure 56: Booth at BIOFACH 2023

The Market for Organic Food in the Czech Republic

Strengths

- Food from the Czech Republic has a good reputation
 - Connection of eco-products and tourism
 - Shopping via e-shops has a high share
 - High density of vegetarian restaurants
 - Organic drugstores and cosmetic stores
-

Opportunities

- Large sales market in Europe and USA?
 - Natural food stores and vegetarian restaurants
 - E-Commerce: Online stores for organic products
 - Presentation of organic food on fairs: e.g. BIOFACH
 - Processing of organic raw materials to high quality food
-

Weaknesses

- Less purchasing during Corona pandemic
 - No governmental advice in organic farming
 - Education and training of specialists in organic farming and in processing
 - Training and further education of skilled workers in organic farming
 - Succession at pioneer companies unclear
-

Threads

- High capital requirements for investments
 - Low purchasing power
 - Inflation development
-

Figure 57: SWOT-Analysis, Heinz Gengenbach, Agriservices, 2023

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