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COORDINATOR CREA

Drivers and barriers for organic processing

Workshop results, June 4 2020

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Workshop set up

- Main goal: To identify drivers and barriers to produce organic food products
- Additional goal: Possible measures to benefit from drivers and overcome barriers; put in time perspective (roadmap)

- Perspectives
  - Market: customers, competitors, users
  - Technology: features, processes, costs, performance
  - Policy: regulation, legislation, investment, funding

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Drivers and barriers

- Examples of drivers:
  - Higher prices for customers
  - More sustainable
  - Less chemical additives

- Examples of barriers:
  - More expensive sourcing
  - Unclear legislation
  - Higher processing costs

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Participants Paris December 2018

- From entire production and consumption chain: farmer associations to retail, policy makers and certification organisations
- Audience 70 people, 9 groups of 6-7 people
- Including ProOrg partners

- 1½ - 2 hours: focus on drivers/barriers, not on measures
- Each working group created long lists and top3s

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Summary of drivers and barriers (Paris 2018)

In brackets: times mentioned in top3s of barriers or drivers by 9 working groups.
Entries: Categories of drivers or barriers. Underlined: related to ProOrg.

Technology Barriers (26)	Drivers (24)	**Market** Barriers (16)	Drivers (25)	**Policy** Barriers (21)	Drivers (20)
Price (8)	Compliance with organic principles (6)	Price (4)	Compliance with organic principles (8)	Sector development (6)	Unclear regulations (6)
Compliance with organic principles (7)	Difference between organic and conventional (6)	Consumer acceptance of technology (4)	Market development (7)	Unclear regulations (4)	Compliance with organic principles (6)
Availability organic produce (2)	Energy and water use (4)	Availability organic produce (3)	Sector development (6)	Limiting regulations (4)	Market development (5)
Energy and water use (2)	Knowledge of processors (2)	Compliance with organic principles (2)	Difference between organic and conventional (3)	Compliance with organic principles (2)	Sector development (4)
Technology scale (2)	Technology scale (1)		Health (1)	Difference between organic and conventional (2)	
Consumer acceptance of technology (2)	Consumer acceptance of technology (1)			Big industry lobbies (1)	
Shelf life compared to conventional products (1)				Political commitment (1)	
Risk of migrations (1)				Long time frame of policy development (1)	

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Participants Rogow June 2019

- Participants: 25 entrepreneurs from the organic food sector, participants divided into 4 groups

- Workshop time (≈1,5h):
  - every aspect considered within 20 minutes (3 x 20min= 60min)
  - a summary of the most important factors (≈30 min)

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Summary of drivers and barriers (Rogow 2019)

The most important barriers of the development of organic processing in Poland in aspect of:

1) Technology :
- Overgrowth of the production process bureaucracy (3)
- High costs of modern devices (3)

2) Market :
- Small production scale, no consolidation (4)
- Limited availability of high-quality raw materials (4)

3) Policy :
- Complicated and extensive legislation (4)

The most important drivers of the development of organic processing in Poland in aspect of:

1) Technology :
- Simple and traditional technologies (2)
- Satisfaction and conviction to own products (2)

2) Market :
- Development of distribution channels and the appearance of new ones (6)

3) Policy:
- The possibility of retail sale straight from the farmer (2)

Table 2. The most frequently mentioned barriers and drivers of the organic processing development

(The number in brackets is the sum of the most frequently mentioned factors assigned to main groups)

Technology		Market		Policy	
Barriers	**Drivers**	**Barriers**	**Drivers**	**Barriers**	**Drivers**
The problem of high-quality raw materials and allowed food additives (12)	Small scale production of Polish factories (5)	Problem with promotion and reliable information about organic food (6)	Development of distribution channels and emergence of new ones (9)	Complicated and extensive legislation (10)	The possibility of retail sale straight from the farmer (2)

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Compliance with organic principles

- Is the way of production compatible with organic?

Differences between organic and conventional

- Are there differences? What are differences?

Sector development

- Professionalisation. Improvement of way of working. Investments.

Unclear regulations

- What is allowed for organic processed foods?

Limiting regulations

- Regulation hampering increase in production and consumption of organic processed foods

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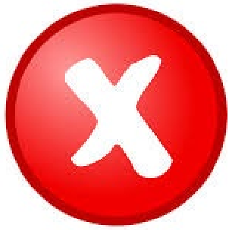
Editions

- (Martijntje / Rodolphe): France, 14 December 2018, ..., Paris
- (Martijntje / Johanna): Germany, 8 May 2019, general assembly of AÖL, Fulda
- (Martijntje): The Netherlands, 12 June 2019, general assembly of Bionext, Ede
- (Ewa / Karolina): Poland, 25 June 2019, Rogów

Cancelled:

- (Flavio): Italy, 13 June 2019, general assembly of Italian association of organic food processors and retailers (ASSOBIO)



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THANK YOU FOR YOUR ATTENTION

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