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Anna Woźniak-Andrzejuk¹

Chair of Agricultural Economics and International Economic Relations
Warsaw University of Life Sciences

Analysis of the regional occurrence of fruit and vegetable producer groups and organizations in Poland

Abstract. The paper discusses issues concerning the fruit and vegetable producer groups and organizations and their regional aspects in Poland. It focuses on the concentration of these organizations in the Polish provinces, taking into account the membership and the legal form they adopt. In the paper, a statement is made that without further consolidation on the Polish fruit and vegetable market, which despite major improvements is still highly fragmented, a deterioration of efficiency will set in. The share of producer organizations in the fruit and vegetables market in Poland must improve in order to reinforce their position in the changing market environment.

Key words: producer organizations, producer groups, fruit and vegetables, European Union,, regional analysis, Poland, agricultural markets.

Introduction

The market of fruit and vegetables belongs to the most advanced sectors of agribusiness in Poland, on the other hand it is characterized as highly fragmented. The vast majority of Polish fruit and vegetables producers are family based enterprises. The family provides most of the labour and capital required to operate the farm and all the management decisions are made within the family. This puts the fruit and vegetable producers at a high disadvantage in the harsh market environment dominated by the market intermediaries and modern distribution channels, which due to their scale remain highly adaptive and flexible to changing consumer preferences. To strengthen the fruit and vegetable sector, the European Commission decided to introduce regulations aimed at consolidation of the fruit and vegetable market. The regulations, which have also been introduced into the Polish law, encourage individual farmers to form organizations in order to collaborate in groups. Collaboration allows for a concentration of supply, common production planning, concentration of demand for the means of production, common negotiation of contracts, entry into new markets, quality improvements, promotion of privately owned brands [Chlebicka 2008].

The process of consolidation of family farms into groups is unavoidable if producers are to remain competitive in the common European market and in general. In some instances the process can even culminate in forming an entity which controls the whole distribution chain. As was the case with the West Australian farmers, who started as a co-operative and came a long way to control the major supermarket chains in the country, giving its stockholders control over a substantial portion of the market. Another example is the United Farmers Co-operative Company (UFCC), formed in the early 1990s. It has evolved as the most significant agricultural cooperative success story in Western Australia since the conversion of the Westralian Farmers Co-operative into a publicly listed

¹ MSc, e-mail: anna_andrzejuk@sggw.pl

corporation. The UFCC's success and rapid membership growth to over 3000 members is also a significant factor contributing to the subsequent mini-boom of co-operative registrations identified in the late 1990s in Western Australia. [Cheong 2006]. In the European Union, a very successful co-operative among others is Veiling Haspengouw from Belgium, Koninklijke Fruitmasters Groep from the Netherlands, or Württembergische Obstgenossenschaft Raiffeisen e.G. from Germany. Together, those three organizations have joined forces to create the European Fruit Cooperation. The process of mergers and joint ventures among western produces organizations illustrates not only the scale of cooperation but also the way of thinking of the management.

Despite some progress in the efforts designed to encourage integration among Polish fruit and vegetable producers, Poland is still a long way from duplicating such success stories as the one from Australia or Western EU countries. Individual Polish producers remain at a high disadvantage when faced with low prices, excessive price volatility and high quality demands from retailers, just to name a few.

Methodology

The purpose of this paper is to show the characteristics, legal forms and regional diversity of fruit and vegetable producer groups in Poland. The time period of the analysis is a snapshot picture on the date of 13.07.2012. The choice of time period was dictated by the data availability and its limitations.

The scope of the paper includes an analysis of the concentration of fruit and vegetable producer groups in each province and in cross-section of category to which they belong.

The study encompasses the entire Polish territory, including the division into 16 provinces which are the basic unit of administration adopted for the analysis. The methodology of this paper employs quantitative research. The data has been developed using a comparative analysis. Basic statistical measures have been applied for the data analysis as well as the classical methods of inference. A deduction method was used for the assessment of events. Presentation of the results was made in a tabular form.

Definition of fruit and vegetable producer groups

The law governing the establishment and conduct of producer groups in Poland is titled Law of the 15th of September 2000 on agri-producer groups and their unions [Ustawa... 2000].

Fruit and vegetable producer organizations are defined as any legal entity which is formed on the own initiative of growers in the categories of products such as fruit, vegetables, products intended for processing, citrus fruit, nuts, mushrooms and culinary herbs. Those organizations must have in particular the aim of ensuring that production is planned and adjusted to demand, particularly in terms of quality and quantity, promoting concentration of supply and placing on the market of products produced by its members, reducing production costs and stabilizing producer prices, promoting the use of cultivation practices, production techniques and environmentally sound waste-management practices.

According to the Council Regulation ((EC) No 2200/96) [Council Regulation...1996], the preliminary recognized fruit and vegetable producer groups are new producer

organizations which have not been recognized yet, have been established with the aim for full recognition, and are allowed a transitional period of no more than five years in which they have to meet the conditions for recognition. During this period an aid can be granted by the state to a producer group to encourage their formation and development. In order to qualify for full recognition, preliminary recognized fruit and vegetable producer groups must present a recognition plan, and after its fulfilment become recognized producer organizations.

Financial aid to producers

There are several ways for the groups to benefit from the state aid for the preliminary recognized fruit and vegetable producer groups. One of those forms of financial assistance is for the costs associated with the creation of producer groups and their administrative activity. The aid for producer groups is also granted to assist in the transition of fruit and vegetable growers to the status of a recognized producer organization. Investment aid is granted in the form of financial assistance to cover a part of the eligible investment costs included in the approved recognition plan.

Financial aid can also be granted to existing recognized producer organizations. This can take the form of financing the operational fund established for specific purposes by a producer organization. The fund is financed by: (a) financial contributions of members or of the producer organisation itself; (b) Community financial assistance which may be granted to producer organisations. Operational funds must be used only to finance operational programmes approved by Member States [European Commission...2011].

The EU member states implement the national strategy for sustainable operational programmes of producer organizations of fruit and vegetables. In Poland the strategy was drafted for the years 2010-2013. It assumes that producer organizations will prepare operational programmes acting as specific business plans with several goals, such as production planning, improvement of product quality, improvement of marketing, R&D, advisory and educational services, prevention of crises, environment protection and other.

Analysis of fruit and vegetable producer groups

In this chapter, fruit and vegetable producer organizations are analyzed first, followed by fruit and vegetable producer groups.

A total of 68 fruit and vegetable producer organizations have been registered in Poland in the analyzed period. The highest concentration of organizations occurred in the voivodeship of Kujawy-Pomerania (16), followed by the voivodeship of Mazovia (14) and the voivodeships of Lublin (12) and Greater Poland (11). Those four provinces aggregate 77,9% of the total number of fruit and vegetable producer organizations in Poland. The lowest number of organizations occurred in 3 provinces, namely the voivodeships Lubuskie, Lower Silesia and Pomerania, with each of those regions having a single organization. The highest number of organizations deal with production of both fruit and vegetables (51). Production of fruit alone have been declared by 10 organizations. Five organizations produce vegetables and just two organizations sell mushrooms. It's

interesting to note that out of 16 Polish provinces, only 10 are represented in the fruit and vegetable producer organizations summary list [Table 1].

Table 1. Categories of fruit and vegetable producer organizations in Poland

Voivodeship	mushrooms	fruit	fruit, vegetables	vegetables	Total
Łódź	1		4		5
Mazovia	1	5	8		14
Greater Poland		2	5	4	11
Lublin		2	10		12
Lubuskie		1			1
Kujawy-Pomerania			15	1	16
Małopolska			2		2
Świętokrzyskie			5		5
Lower Silesia			1		1
Pomerania			1		1
Total	2	10	51	5	68

Source: own research based on data from the Ministry of Agriculture and Rural Development for the European Commission report on fruit and vegetable producer groups and organizations.

Fruit and vegetable producer organizations fall into four categories with regard to the adopted legal form: limited liability company, co-operative, association and union. The highest number of organizations are organized as a limited liability companies (29). The second most popular form is the union, with 19 organizations, followed by co-operatives (13). It is a surprise to discover that the union is the second most popular entity, especially that no shares are sold under this form, and the voting rights are equally distributed among members. Which also assumes that each member contributes equally to the organization's value [Ejsmont & Milewski 2005]. It is also worth noticing that 7 organizations are registered under the association form. It must be added that associations are organizations with social objectives. Economic activity in the case of associations cannot be an end in itself. An association cannot be formed with an aim to conduct business.

Fruit and vegetable producer organizations consist of a group of members. According to the Law of the 15th of September 2000 on agri-producer groups and their unions [Ustawa... 2000] the number of members cannot be lower than 5. The fruit and vegetable producer organizations in Poland aggregate 3533 members in 68 groups. This averages to 51.96 members per group. The highest average number of members (261.5) takes place in the voivodeship of Małopolska with 523 members concentrated in two organizations. The lowest average number of members takes place in the voivodeship of Lubuskie, with 16 members gathered in a single organization. It is worth noticing that the two provinces with the largest number of fruit and vegetable producer organizations, the voivodeship of Kujawy-Pomerania and the voivodeship of Mazovia have below average numbers of members (29 and 37).

239 fruit and vegetable producer groups have been registered in the analyzed period. The highest concentration of groups occurred in the voivodeship of Mazovia which currently holds 75 groups and which constitutes 31.4% of all the groups. The second most

active region is the voivodeship of Greater Poland, holding 33 groups, which constitutes 13,8% of the total number of groups. And the third most active region is the voivodeship of Kujawy-Pomerania with 28 groups making up for 11,7% of the total. Those three regions already stand for 56,9% of the total number of groups. The relatively high number of groups in these provinces can be connected with such factors as tradition of cooperation between farmers, structure of farms and natural conditions in these regions. It is worth noting that out of 16 voivodeships in Poland 9 hold less than ten fruit and vegetable producer groups, with the lowest number of groups occurring in voivodeship of Podlasie (2), voivodeship of West Pomerania (2), voivodeship of Warmia-Masuria (3) and voivodeship of Silesia (3).

Table 2. Legal forms of fruit and vegetable producer organizations in Poland

Legal form	Voivodeship	Total
Ltd. company	Łódź	2
	Mazovia	9
	Greater Poland	4
	Lublin	3
	Kujawy-Pomerania	8
	Małopolska	1
	Świętokrzyskie	1
	Lower Silesia	1
Total Ltds.		29
Co-operative	Łódź	1
	Mazovia	4
	Greater Poland	3
	Kujawy-Pomerania	2
	Świętokrzyskie	3
Total co-operative		13
Association	Kujawy-Pomerania	6
	Świętokrzyskie	1
Total associations		7
Union	Łódź	2
	Mazovia	1
	Greater Poland	4
	Lublin	9
	Lubuskie	1
	Małopolska	1
	Pomerania	1
Total unions		19
Grand total		68

Source: own research based on data from the Ministry of Agriculture and Rural Development for the European Commission report on fruit and vegetable producer groups and organizations.

Table 3. Average number of members of fruit and vegetable producer organizations in Poland

Voivodeship	Average number of members	Number of members	Number of organizations
Łódź	51.20	256	5
Mazovia	37.64	527	14
Greater Poland	63.36	697	11
Lublin	61.00	732	12
Lubuskie	16.00	16	1
Kujawy-Pomerania	29.69	475	16
Małopolska	261.50	523	2
Świętokrzyskie	52.00	260	5
Lower Silesia	20.00	20	1
Pomerania	27.00	27	1
Total	51.96	3533	68

Source: own research based on data from the Ministry of Agriculture and Rural Development for the European Commission report on fruit and vegetable producer groups and organizations.

As far as the products are concerned, the fruit and vegetable producer groups concentrate in four major categories: fruit, vegetable, fruit and vegetable and mushrooms. A total number of 213 groups, which amounts to 89.1%, belong to these four categories. The most important is the fruit and vegetable category with 67 groups, closely followed by the vegetable (66), and fruit (60) categories. The mushroom producing groups constitute 20 groups. The lowest number of groups participate in the culinary herbs (1), and culinary herbs, vegetable, other (1).

Fruit and vegetable producer groups fall into two categories with regard to the adopted legal forms: limited liability company (Ltd.) and co-operative. The number of groups with Ltd. legal form, which amounts to 228, overwhelms the number of co-operatives (11 groups), which translates into 95.4% limited liability companies. The highest number of Ltd.'s is located in the voivodeship of Mazovia with 73 groups. The highest number of co-operatives are located in the voivodeship of Małopolska with 4 groups. It is worth noting that the voivodeship of Mazovia, despite having the highest number of limited liability companies, has also one of the lowest numbers of co-operatives (2 groups). It is highly arguable why the legal form of a limited liability company is more popular in Poland than the co-operative form, however, it appears to be determined by the more favourable image, and more business-like approach of a company. Moreover, an important argument might also be the voting system according to the number of shares in contrast to the number of members in the co-operative system.

A single fruit and vegetable producer group consist of a number of members. In all fruit and vegetable producer groups in Poland there are in total 3101 members. The minimum number of members stands at 5. Some groups, however, tend to be much larger. The analysis shows that the average number of members in a group is 12.97. The most densely populated province in terms of group membership in Poland is the voivodeship of Lublin with an average of 23 members per group. The most sparsely populated groups occur in the voivodeship of Warmia-Masuria, with an average of 5 members per group. In absolute terms the region with the highest number of members is the voivodeship of

Mazovia (1269 members), the second highest number is only 483 members in the voivodeship of Lublin. The third highest number of membership can be found in the voivodeship of Małopolska (223), closely followed by the voivodeship of Greater Poland (217 members) and the voivodeship of Kujawy-Pomerania (205). It is interesting to notice that the eastern provinces of Poland with relatively less developed small farms as compared to the western part, show the highest concentration of membership in fruit and vegetable producer groups. This is in line with the general idea of the EU and Polish legislation aimed at strengthening the bargaining power of small agricultural producers by means of their concentration and collaboration.

Table 4. Categories of fruit and vegetable producer groups in Poland

Voivodeship	mushrooms	fruit	fruit, other	fruit, vegetables	fruit, vegetables, mushrooms	fruit, vegetables, other	vegetables	vegetables, other	culinary herbs	culinary herbs, vegetables, other	Total
Lower Silesia	2			1			6				9
Kujawy-Pomerania	3	1	11		1	9	2		1		28
Łódź	1	6		4		1	2				14
Lublin	4	4	1	6		2	4				21
Lubuskie	2			1			2				5
Małopolska	1	5		1	1	2					10
Mazovia	4	30		25	1	3	12				75
Opole	1	1					4				6
Podkarpacie		2				3	1	1			7
Podlasie				1		1					2
Pomerania	1	2		1		1	4				9
Silesia	1						2				3
Świętokrzyskie		2		7			2	1			12
Warmia-Masuria				2			1				3
Greater Poland	5	3		6		1	15	2	1		33
West Pomerania				1			1				2
Total	20	60	2	67	1	13	66	8	1	1	239

Source: own research based on data from the Ministry of Agriculture and Rural Development for the European Commission report on fruit and vegetable producer groups and organizations.

In terms of membership, the highest number of members is concentrated in the categories of fruit and vegetable producing groups (1046 members) which constitutes 33.7% of the total number of members. In the second place comes the number of members of the fruit production category (833), and the third is the category of fruit, vegetable and others, with 531 members, followed by the vegetables category (365). Four of those categories constitute 89.4% of the total number of members.

Table 5. Legal form of fruit and vegetable producer groups in Poland

Legal form	Voivodeship	Total
Ltd.	Lower Silesia	9
	Kujawy-Pomerania	27
	Lublin	21
	Lubuskie	5
	Łódź	13
	Małopolska	6
	Mazovia	73
	Opole	6
	Podkarpacie	5
	Podlasie	2
	Pomerania	9
	Silesia	3
	Świętokrzyskie	12
	Warmia-Masuria	3
	Greater Poland	32
	West Pomerania	2
Ltd. Total		228
Co-operative	Kujawy-Pomerania	1
	Łódź	1
	Małopolska	4
	Mazovia	2
	Podkarpacie	2
	Greater Poland	1
Co-operatives Total		11
Total		239

Source: own research based on data from the Ministry of Agriculture and Rural Development for the European Commission report on fruit and vegetable producer groups and organizations,

As shown in the above analysis, currently in Poland there are 68 fruit and vegetable producer organizations with an average number of 51.96 members, and 239 preliminarily recognized fruit and vegetable producer group with an average number of 12.97 members. For the fruit and vegetable producer organizations the highest number of organizations are placed in the voivodeship of Kujawy-Pomerania, for the fruit and vegetable producer group it is the voivodeship of Mazovia that holds the highest number of groups. The most common legal form for both organizations is the limited liability company. In both, the producer organizations and the preliminarily recognized producer groups, the category of fruit and vegetable concentrate the highest number of entities. In the current economic environment which favours the strong retail chains and disposes the family farms of their bargaining power, it is of high importance for the fruit and vegetable farmers to organize into strong groups in order to gain at least some control over the supply and the production part of the distribution chain. Despite a high commitment from the Polish authorities to

promote this form of management of fruit and vegetable production, the level of organization of the market, as measured by the share of producer organizations in the marketing of fruit and vegetable production, was estimated in 2005 at around 2%. In the EU, the average amounts to 40% and in some countries even up to 80% [Jabłońska 2005]. Today, the EU average has stayed approximately the same, however according to Boguta [2012] the Polish average has improved to around 20%. Nevertheless, the size of the groups remains fairly small. A few obstacles to broader cooperation between farmers have been identified. They are a reluctance to conduct joint activities, farmers' individualism, mutual distrust between agricultural producers, bad experiences related to the functioning of agricultural cooperatives in the People's Republic of Poland, lack of experience of farmers in joint economic activities under free market conditions, lack of a basis (an office building, infrastructure) on which the groups could establish their economic activities, lower position of farmers in the agricultural market due to the lack of shares in agri-food processing establishments and establishments for wholesale marketing of agricultural products [Martynowski 2012]. Nevertheless, as shown in a research on agricultural producer groups, the highest number of positive answers with regard to cooperation between farmers was related to the improvement of household welfare [Malchar-Michalska 2011].

Table 6. Average number of members of fruit and vegetable producer groups in Poland

Voivodeship	Average number of members in group	Number of members	Number of groups
Lublin	23.00	483.00	21.00
Małopolska	22.30	223.00	10.00
Podkarpacie	20.71	145.00	7.00
Mazovia	16.92	1269.00	75.00
Łódź	13.50	189.00	14.00
Świętokrzyskie	11.50	138.00	12.00
Lubuskie	10.40	52.00	5.00
Kujawy-Pomerania	7.32	205.00	28.00
Greater Poland	6.58	217.00	33.00
Podlasie	6.00	12.00	2.00
Silesia	5.33	16.00	3.00
Lower Silesia	5.33	48.00	9.00
Opole	5.33	32.00	6.00
Pomerania	5.22	47.00	9.00
West Pomerania	5.00	10.00	2.00
Warmia-Masuria	5.00	15.00	3.00
Total	12.97	3101.00	239

Source: own research based on data from the Ministry of Agriculture and Rural Development for the European Commission report on fruit and vegetable producer groups and organizations.

Table 7. Number of members of fruit and vegetable producer organizations in Poland

Voivodeship	mushrooms	fruit	fruit, other	fruit, vegetables	fruit, vegetables, mushrooms	fruit, vegetables, other	vegetables	vegetables, other	culinary herbs	culinary herbs, vegetables, other	Total
Lower Silesia	11			5			32				48
Kujawy-Pomerania	17	5	91		22	54	10		6		205
Łódź	7	74		86		6	16				189
Lublin	22	22	68	82		269	20				483
Lubuskie	34			5			13				52
Małopolska	13	91		37		70	12				223
Mazovia	45	528		587	8	33	68				1269
Opole	5	7					20				32
Podkarpacie		10				115	5	15			145
Podlasie				6		6					12
Pomerania	5	11		6		5	20				47
Silesia	5						11				16
Świętokrzyskie		47		65			10	16			138
Warmia-Masuria				10			5				15
Greater Poland	31	15		61		11	84	10	5		217
West Pomerania				5			5				10
Total	167	833	73	1046	8	531	365	67	5	6	3101

Source: own research based on data from the Ministry of Agriculture and Rural Development for the European Commission report on fruit and vegetable producer groups and organizations.

European perspective

Taking the broader European perspective, the statistical data for 2004 shows that the country with the highest number of producer organizations in the European Union is Spain (616), followed by France (314), Greece (113) and Italy (102). However, the organization level varies strongly across the EU, with the share of producer organizations in national production being the highest in Belgium, the Netherlands and Ireland. Typically for the Netherlands and Belgium, more than 90% of all fruit and vegetables are marketed through producer organizations. Moreover, in Belgium 90% of sold products are produced by only a few associations. In Flanders, 15 producer organizations make up a total of 17.200 members [Avermaete & Huygens 2009]. The organization rate in the 'Old European Union' is also much higher than in Poland which currently stands at around 20% [Szeleźniak 2012] as mentioned in the previous chapter. For example, in Spain the organization rate in 2007 was 36.3%, in Italy 35.4% and in France 46%. For some product

categories the organization rate can be even higher, mainly the export oriented branches [Camanzi et al. 2009]. The study also reveals high specialization levels on some products such as apples or onions and an adequate high capability of concentrating agricultural supply by the largest producer organizations, especially in Spain and Italy [Camanzi et al. 2009].

It should be emphasized that creating effective institutional structures in the agricultural sector is not an easy and quick process. It requires not only time, but also strong and efficient public financial support [Malchar-Michalska 2011].

In a publication named 'The prospects for CAP reform after 2013 – a summary of the Commission proposals', there is a provision also for aid to producer groups. Support should be offered to small operators for organizing joint working arrangements and share resources, including by horizontal and vertical co-operation in the supply chain, local markets and local food chains [The prospects... 2011].

In the long term perspective it is important to keep this financial support for the benefit of such organizations in the next EU financial framework 2014-2020. The lack of financial encouragement can weaken the dynamics of creation of these business entities (nowadays the main stimulating factor remains financial help). As far as changes in international agricultural commodity markets and the issue of food security are concerned, it is necessary to reform the CAP. The instruments supporting agricultural producer groups in the new member countries favour structural changes in rural areas and that is why they should be maintained in the next EU budget [Malchar-Michalska 2011].

Conclusion

There are currently 68 fruit and vegetable producer organizations and 239 initially recognized fruit and vegetable producer groups in Poland. Both groups remain highly concentrated within a few voivodeships. In the case of producer organizations, they are the voivodeship of Kujawy-Pomerania, voivodeship of Mazovia, voivodeships of Lublin and Greater Poland.

The four provinces aggregate around 77.9% of the total number of producer organizations. In the case of producer groups, it is the voivodeship of Mazovia, the voivodeship of Greater Poland and the voivodeship of Kujawy-Pomerania. The three provinces aggregate around 56.9% of initially recognized producer groups. In both cases, there is a high concentration of groups in few provinces in Poland.

The most popular legal form for conducting business by the producer organizations as well as the initially recognized producer groups is the limited liability company, followed by the co-operative form. The union legal form which stands out in the producers organizations is also used.

Despite having a strong support from the EU in the form of financial aid, the level of participation of family farms in the producer organizations in Poland is still not sufficient. This situation will hinder the development of fruit and vegetable producers and their bargaining power abilities. If the well being of family farms is to be preserved, fostering diversity and improved conditions of life in the countryside, individual farmers should not only commit to the producer organizations, but go even further and allow the organizations to merge into stronger entities in order to compete with other members of the supply chain.

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