Country Profile
CZECH REPUBLIC

Access to Land · Land Markets · Generational Renewal

Prepared by: Nadace pro půdu (Foundation for Land)
Published by: Access to Land Network (A2LN), 2025
Sources: Czech Statistical Office (ČSÚ); EC RDP Factsheet CZ 2024; JRC Report on Land Market Regulation (2021); RURALIZATION project; Nadace pro půdu

3.52M ha	33,166	133 ha	74%
Utilised Agric. Area (UAA)	Registered Farmers (2023)	Avg. Farm Size	Land Leased

I. GENERAL AGRICULTURAL CONTEXT

The Czech Republic has one of the most extreme land concentration profiles in the European Union — a direct structural legacy of 40 years of forced collectivisation followed by fragmented privatisation. Large corporate farms dominate land use while land ownership is pulverised among millions of small private holders, creating a rental market that is unusually thin on regulation and oversight.

Farm Structure

Indicator	Value / Description
Total UAA	3,521,180 ha (~53% of total national territory)
Registered farmers (2023)	33,166 — down 15.1% since 2000
Average farm size	133 ha (2013; among highest in EU)
Small farms (< ~5 ha)	89% of holdings — manage only 30% of UAA
Large farms (> 100 ha)	11% of holdings — manage 70% of UAA
Land under lease	~74% of UAA (range: 72–83% by source/year)
Public land ownership	Under 5% of UAA (~212,000 ha State Land Fund)
Arable land	~42.2% of total national territory

Sources: ČSÚ; EC RDP Factsheet CZ 2024; JRC 2021

Land Use Distribution

By land area: approximately 42.2% of Czechia is arable land, 34% forests. By agricultural output value: cereals dominate at 39.5% of crop production value, followed by industrial crops (23.5%). In animal production, milk leads at 55.1% of value, followed by pigs (14%) and cattle (13.2%).

Organic & Agroecological Farming

Czechia has a relatively high organic farming share compared to Central European peers. As of 2021, approximately 16% of Czech UAA was managed organically, with nearly 4,800 certified organic farms. National policy targets exceed 21% by 2027.

However, this headline figure masks an important structural distortion: organically managed land is overwhelmingly permanent grassland and permanent crops — not arable land:

- Organic arable land: ~2% of all arable area
- Organic permanent grassland: ~40% of all permanent grassland
- Organic permanent crops (orchards, vineyards): >10%

In practice, much of the organic area is extensive grassland with limited management, rather than actively transitioning agroecological farms. Real agroecological capacity on arable land remains very limited.

II. FARM SUCCESSION & GENERATIONAL RENEWAL

Age Profile

>55	–15.1%	No data	CAP only
Majority of farm managers' age	Farmers since 2000	Succession rate	Public support mechanism

The Czech farming population is significantly ageing. The majority of farm managers are over 55, and no systematic national data exists on succession rates. The smallest and least economically viable farms — often operated by older farmers — face the greatest succession challenges, with little incentive for younger entrants given structural barriers to land access.

There are no national farm succession policies beyond CAP instruments:

- CAP Pillar 1: Top-up direct payments for young farmers on first 90 ha.
- CAP Pillar 2 (RDP): Investment grants — CZK 1.257 billion supporting approximately 1,020 new farm start-ups.
- Centrum Konipas: Practical agroecological training and mentorship for new entrants.
- Young Agrarians' Society (Mladí agrárníci): Advocacy for sustained policy support for new entrants.

Structural Challenge: New entrants locked out by lease dependency

- With 74% of land under lease and no pre-emptive rights for new farmers, new entrants must compete directly with established large farms for lease contracts.
- Large farms can offer more stable, higher-value lease terms — effectively crowding out smaller and agroecological new entrants.
- Nadace pro půdu (Foundation for Land) is developing land trust models to offer an alternative pathway outside the commercial lease market.

III. ACCESS TO LAND

Tenure Structure

Approximately 74% of Czech UAA is farmed under lease — one of the highest lease ratios in the EU. This is a structural consequence of the 1990s restitution process, which restored fragmented private ownership to millions of non-farming heirs. Around 3.2 million natural persons own agricultural land, averaging just under 1 ha each. Half own less than 0.25 ha.

As of 2017, 52,000 legal entities also own agricultural land — an average of 16 ha each. Corporate farms, predominantly large agribusiness operations, are primarily lessees rather than owners, but control a dominant share of UAA in terms of operational use.

Agrofert — the agribusiness conglomerate formerly linked to ex-Prime Minister Andrej Babiš — manages approximately 100,000 ha of agricultural land in Czechia (around 1.26% of all Czech land / 2.84% of arable land), the vast majority leased. In August 2025, Czech authorities launched proceedings to reclaim CZK 5.1 billion in CAP subsidies from Agrofert, citing political conflict of interest.

Land Ownership Concentration

89%	70%	3.25M	<1 ha
Farms < 5ha share of holdings	UAA controlled by top 11% of farms	Private landowners (2017)	Average ownership per nat. person

Czechia holds one of the most extreme land concentration records in the EU: the top 19% of farms (those over 100 ha) controlled 89% of arable land as of 2010. Ownership is simultaneously highly fragmented — millions of small private holders — and operationally concentrated — a small number of large farms control nearly all productive land through leases.

Land Prices & Market Trends

Year	Sale Price (CZK/ha)	Approx. €/ha	YoY Change	Notes
2016	204,100	~€8,163	–	Tripled since 2004
2017	235,100	–	+15.2%	Large surge
2018	240,850	~€9,510	+2.4%	
2019	243,985	–	+1.3%	
2020	253,510	–	+3.9%	
2021	294,326	–	+16.1%	Second major surge
2022	~320–335k	~€12,800–13,400	Continued rise	
2023 avg. rent	–	~€173	–	~4,500 CZK/ha/yr

Source: Nadace pro půdu; ČSÚ; JRC 2021

Land prices have roughly tripled since 2004 and remain among the more affordable in the EU — but are rapidly converging upward. Rental yields are historically very low (~1–1.5%), reflecting the highly fragmented ownership structure and lack of active management by millions of small non-farming owners. CAP area payments are widely recognised as having capitalised into land prices — both sale and rental — inflating returns to landowners rather than active farmers.

IV. LAND MARKET REGULATION

Legal Framework

The Czech land market operates under the Civil Code (Act No. 89/2012 Coll.), which establishes highly liberal rules. There are no restrictions on land ownership by size, legal status, or nationality of the buyer — both domestic and foreign natural and legal persons may freely purchase agricultural land.

Pre-emptive rights are extremely limited:

- Family relatives and co-owners: 6-month pre-emption right following inheritance acquisition.
- State land only: tenants who have rented state land for at least 36 months have a preferential purchase right — but may acquire no more than 70% of the offered area.
- No general pre-emptive rights for sitting tenants of privately owned land.
- No priority rights for new entrants or agroecological farmers.

Lease contracts are registered in the Cadastre of Real Estate (managed by Cadastral Offices). Lease conditions are predominantly set by contractual parties, with minimal state intervention. Contract duration and price are freely negotiable.

Historical Context: From Collectivisation to Liberal Market

Period	Reform / Event	Impact
1919–1922	First Land Reform (Expropriation Act)	Broke up large estates; created numerous smallholders (avg ~1.2 ha)
1945–1989	Collectivisation	Shifted land to state/cooperative farms; eradicated private farming
1991–2003	Restitution & Privatisation	Restored fragmented private ownership; established Land Fund & consolidation process
Early 1990s	Economic Privatisation	Cemented private ownership; integrated land into market economy

Source: Nadace pro půdu; JRC 2021

The restitution process of the 1990s restored land title to millions of non-farming heirs, creating the unique ownership fragmentation that defines Czech land markets today. No systematic policy has since addressed the growing gap between fragmented ownership and concentrated operational control.

Recent Legislative Developments (2024–2025)

Indicator	Value / Description
Agricultural Land Fund Protection	Stricter rules (from 2025) preventing conversion of high-quality farmland for development, including ground-mounted PV.
Agrivoltaics Regulation	Solar installations legalised over specific crops under strict design rules; land remains in agricultural register.
Development Fee Increases	Higher charges to remove land from Agricultural Land Fund for non-agricultural use, targeting lower-quality lands.
Real Estate Tax Expansion	Forest lands included; exemptions tightened within property tax regime.
Agrofert subsidy reclaim	August 2025: CZK 5.1 billion CAP subsidy repayment sought from Agrofert due to political conflict of interest.

V. POLICY & POLITICAL CONTEXT

CAP & Subsidy Distribution

Large-scale farms benefit disproportionately from CAP direct payments in Czechia. Studies have shown that large agribusinesses generate more profit per crown of subsidy than smaller farms, deepening structural inequality. CAP redistributive payments (2023–2027) aim to shift funding toward smaller farms, but have triggered fierce opposition from the Agrarian Chamber and Agricultural Union — representing large farm interests.

CAP area payments are widely documented as having been capitalised into land sale and rental prices — effectively transferring public subsidy value to landowners rather than active farming families.

Farmer Protests (2023–2025)

Farmers' protests swept Czechia as part of the broader European wave (2023–2025). Demands focused on:

- Opposition to EU trade deals (Mercosur; Ukrainian duty-free grain imports) — citing unfair competition from lower-standard producers.
- Resistance to Green Deal environmental regulations, particularly pesticide reduction targets.
- Demands to reduce CAP bureaucracy and administrative burden.

These protests were predominantly organised by and for large conventional farm interests, and have created political headwinds for more ambitious agroecological or land market reform policies.

Key Organisations

Organisation	Constituency & Position
Agrarian Chamber (Agrární komora ČR)	Represents large/industrial farms; opposes redistributive CAP; strong influence on national policy
Agricultural Union (Svaz ZP ČR)	Similar to Agrarian Chamber; large farm focus; opposes environmental reform burden
Private Agriculture Association	Advocates for smaller producers; supports redistributive CAP payments and farming diversification
Nadace pro půdu	Foundation for Land; develops land trust models; advocates for new entrant access and agroecological farming
Centrum Konipas	Practical agroecological training and farm start-up support for new entrants
Young Agrarians' Society (Mladí agrárníci)	Advocates for policy support for young/new farmers; broadly conventional focus
CSA Networks (emerging)	Community Supported Agriculture — local, ecology-focused producer–consumer linkages

VI. KEY BARRIERS & OPPORTUNITIES

Top Barriers to Land Access

- Structural lease dependency: 74% of UAA is leased; new entrants must compete in an open rental market dominated by large, financially powerful farm operators — with no pre-emptive rights or priority access mechanisms.
- Ownership fragmentation without function: 3.2 million private owners averaging under 1 ha each create enormous transaction costs and administrative complexity. Most owners are not farmers and have no active relationship to the land.
- No pre-emptive rights or land control authority: Unlike France (SAFER) or Germany (GrdstVG), Czechia has no institutional mechanism to prioritise farmer or new entrant access to land on the market.

- CAP subsidy capitalisation: Area-based payments are absorbed into land prices, benefiting landowners and large tenants — not new entrants or small farms.
- Liberal market for corporate and foreign buyers: No nationality restrictions, no size limits, no share deal oversight — making Czechia particularly exposed to speculative investor demand.

Opportunities for Change

- Family Farm Legislation: Proposed formal legal recognition and tailored support framework for family farms — a potential lever for reshaping how subsidies, land access, and financing are structured.
- Land trust models: Nadace pro půdu is developing Czech adaptations of land trust and community land models — offering a pathway outside the commercial market for new entrant and agroecological farmers.
- State Land Fund reform: The State Land Office manages ~212,000 ha of state land. Reform of its mandate — enabling proactive allocation to young and agroecological farmers rather than passive privatisation — could be transformative.
- Land consolidation as agroecology lever: The ongoing land consolidation process (voluntarily assembling fragmented plots) creates windows for introducing environmental and access conditions into restructured holdings.
- Youth-led alliances: CEJA and national Young Agrarians networks offer advocacy platforms — though aligning these toward land access reform rather than only subsidy maintenance remains a strategic challenge.

VII. ADVOCACY & ALLIANCE PRIORITIES

Nadace pro půdu (Foundation for Land) — Priorities

The profile submission notes that advocacy, methods, and alliance sections are still being developed. Based on available information, key directions include:

- Developing and piloting land trust and community ownership models adapted to the Czech legal and social context — offering land access to new entrant and agroecological farmers outside the speculative market.
- Advocating for a Family Farm Law — formal legislative recognition and tailored support for family-scale operations.
- Engaging with the CAP redistributive payments debate — pushing for genuine redistribution toward smaller farms and new entrants.
- Building linkages between CSA networks, new entrant support organisations (Centrum Konipas), and policy advocacy toward land market reform.

Strategic EU-Level Themes

- Pre-emptive rights and land control mechanisms: Making the case — alongside Germany, France, and Belgian partners — for EU-level frameworks enabling member states to regulate speculative land purchases and prioritise farmer access.
- CAP reform: Ending the capitalisation of area payments into land prices through stronger coupling of subsidies to active farming outcomes rather than land ownership.
- Transparency in land ownership: Mandatory reporting on corporate and investor land holdings across member states.

VIII. KEY SOURCES

Czech Statistical Office (ČSÚ) — structural agricultural data (csu.gov.cz)

European Commission — RDP Factsheet Czech Republic 2024 (agriculture.ec.europa.eu)

JRC Report on Land Market Regulation in EU Member States — JRC126310 (publications.jrc.ec.europa.eu), 2021

RURALIZATION Project D5.1 — Land access in rural areas (ruralization.eu), 2021

MDPI Agriculture — CAP redistributive payments and Czech farm structure (2022)

LeftEast — CAP impact on Czech and Hungarian land politics (lefteast.org)

Radio Prague International — Agrofert subsidy reclaim proceedings (2025)

Nadace pro půdu — internal research (asociaceampi.cz / nadacepropudu.cz)

Co-funded by the European Union