



**ORGANIKA**

Shoqata e Përpunuesve dhe Eksportuesve të PPJD dhe BMA

Association of the Processors and Exporters of NWFP and MAP

## **BASELINE STUDY FOR THE MAP AND NWFP SECTOR**



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## 1. INTRODUCTION

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Agriculture is an important sector in Kosovo, which can absorb a significant number of the workforce, especially in rural areas. Most of the farmers are very small and are largely oriented only to the production of household needs and a minority dedicate their products to the market even though recently has a strong orientation towards commercial production.

About 60% of Kosovo's population lives in rural areas where 80% of farms are between 0.5 and 2.0 ha and only 1.4% of farms are more than 10 hectares. The unemployment rate in Kosovo is about 40%, where 60% of the unemployed are from rural areas.

Due to the low yield and prices of conventional products, farmers find it difficult to compete with those in the region and the EU resulting in a long-term trend of declining farms and farmers. Thus, new initiatives, including the purpose of this NWFP and MAP sector development project and organic production, are an important potential for the diversification and stabilization of rural economies. This would help create jobs and increase community incomes and would provide a broader market base for local businesses.

Only a small part of domestic production is processed; agro-processing enterprises mainly use raw material from imports. The development of the NWFP and MAP sector would also help the processing industry to create an opportunity for the raw material produced to be processed in rural areas in Kosovo.

The NWFP and MAP sectors are developing at an accelerated rate and the participation of production areas, mainly organic, has increased in many countries. About 2 million organic producers in the world operate on 43.1 million hectares of agricultural land (Willer, 2015). Most of these areas are located in developing countries, which is the opposite of conventional production, of which 2/3 are located in developed countries. About 35 million hectares are used for collection of products, mainly NWFPs.

Kosovo is rich in natural resources and conditions that create a favourable environment for development of NWFP and MAP, including labour availability, quality and quantity of land, water and other natural resources, and favourable climate.

NWFPs and MAPs production is linked with organic agriculture and has great potential for Kosovo, due to its traditional production in rural areas and suitable environmental conditions for organic production and collection of NWFPs. Current production methods are characterized by low-input extensive small-scale farming systems, often for self- subsistence. Producers could easily convert to organic agriculture, especially considering that the use of pesticides and fertilizers is low.

The development of research, training and education in NWFP and MAP sector is of key importance to increase the level of public awareness and knowledge among experts, farmers, and other stakeholders within the sector. Extension services are very necessary for collectors and producers of the NWFP and MAP sectors, not only in terms of production but also for exploring market demand. There are different approaches in the region and beyond, to the advisory service for the development of NWFP and MAP businesses, but these approaches depend on the region, authorities and available funds. However, farmers need access to information on new technology of production and specific rural development policies, as well as other local regulations. Furthermore, the advisory service should include promoting good practices and successful initiatives so that businesses gain knowledge and encourage more innovations for the use and development of existing NWFP and MAP capacities and extension of organic production.

For collectors and producers of NWFP and MAP there are some extension services organized from MAFRD and municipal specialists, advice provided by projects supported by various donors, and from major processors and exporters. Currently, some associations and non-profit organizations such as ORGANIKA, IADK, with the support of international organizations provide farmers with consultation services and training.

One of the key factors for faster development of this sector is the lack of financial resources needed for a comprehensive modernization of all segments of agro-production, the replacement of outdated technology and equipment, the upgrading of the existing agrarian structure, etc. Agricultural financing in Kosovo is dominated by commercial banks that are interested in lending to the agricultural sector, but this sector is perceived as very risky due to poor production performance and limited agricultural markets.

Since 2016, MAFRD has been supporting all farmers, with direct payments from state budget for the following crops: cereals (120 Euros/ha), fruits (400 Euros/ha), vegetables (300 Euros/ha), MAPs (200 Euros/ha). For certified organic products, additional support was provided in 2017, as follows: cereals (120 Euros/ha), fruits (400 Euros/ha), vegetables (300 Euros/ha). In 2017, for certified organic MAPs the payment increased to 300 Euros/ha. The budget planned for 2018 for the stimulation of direct payments in organic agriculture is estimated at 100,000 Euros. It is important to highlight that starting from 2018 new support measures are proposed for organic farmers, including the coverage of the cost for certification and the support during the conversion process.

The association "ORGANIKA" established in 2013 represents the main operators of the NWFP and MAP sector with objectives to improve cooperation among organic sector actors, to promote organic products from Kosovo and to lobby for development of the sector. ORGANIKA has recently started to be more active in the sector. However, the association still lacks the information regarding the cultivation, production and export capacities of its members and as well as for the sectors of NWFP and MAP as whole.

ORGANIKA found that there is a need to develop a data base containing information, such as stage of collection point, their capacity of cultivation and collection, storing capacities, current exports, the exporting countries, future potential export capacities and targeted markets, the employment in the sector and their gender. ORGANIKA gathered information not only from its members, but all collection points active in the sector, in order to create the "Sector data base". This database will serve as a tool to conduct the "Baseline study" for the sector, which will also crosscheck gathered data with information from other sector stakeholders to fill the missing data from the field research.

ORGANIKA has engaged a senior local consultant to develop a questionnaire, analyse the data and finalize a sector baseline study. This information will be useful by ORGANIKA to inform its members about the current status of the sector, explain the gaps and present the future potential of the sector. The study will also be useful for the GIZ-CETEP project for monitoring and evaluation purposes. The baseline sector data will be updated and published every year to ensure accurate information for the NWFP and MAP sector.

## 2. DEVELOPMENT OF NWFP AND MAP SECTOR

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According to the Kosovo Agency of Statistics (KAS, 2017), the utilized agricultural area (UAA) covers 415,831 hectares (including common land that is important for MAP sector development). UAA includes 52.6% of meadows and pastures (including common land), 45.0% of arable land, 2.0% of perennial crops (fruits,

vineyards, fruit trees) and 0.2% of gardens. Agricultural trade is characterized by a large trade deficit as agricultural exports represent only 5% of agricultural imports.

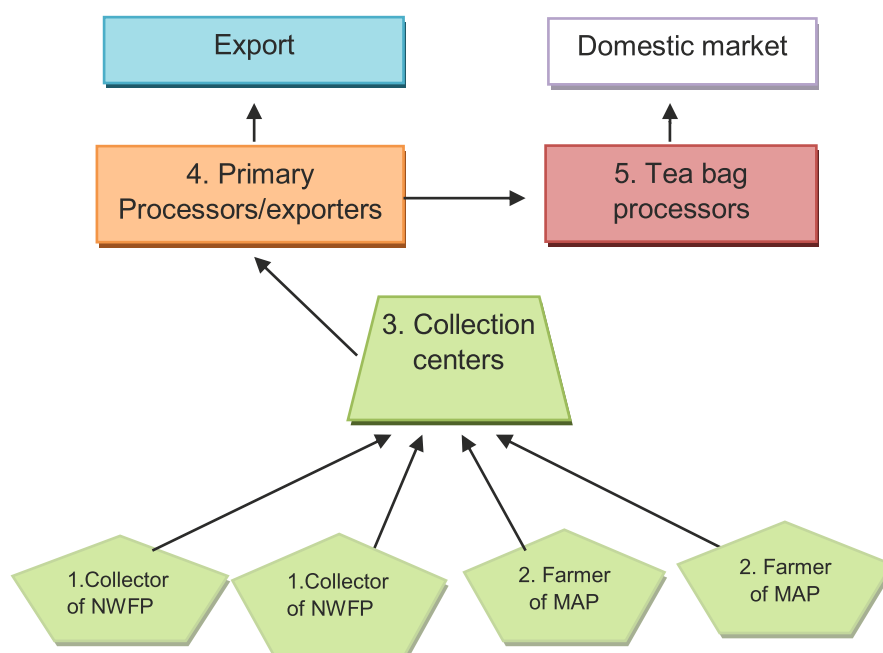
The NWFP and MAP sector has some limitations that are common to developing countries that need to be addressed in all aspects of the NWFP and MAP industries: lack of research on the development of high yield varieties, poor harvesting and post harvesting practices, inefficient techniques for processing that affect quality of products, poor quality control procedures, lack of local markets for primary processed products, and lack of access to the latest technology and market information.

The development of organic agriculture in Kosovo is slow and only the organic collection of NWFPs and production of MAPs have started to develop rapidly. The supply chain is organized with several marketing phases involving farmers - collectors and key producers, collection centres, primary processors / exporters that export products as raw materials to the international market or supply processors that sell processed products to the local market.

**Participants in the value chain of NWFP and MAP sector can be grouped into the following categories:**

1. NWFP collectors - usually belong to rural socially vulnerable groups;
2. MAP producers / farmers - Agro-entrepreneurs - people who grow plants and who are mostly familiar with the technology and techniques of breeding. Agro-entrepreneurs work on the cultivation of a MAP on the basis of a contract concluded with a collection centre. This is especially the case with organic production, where agro-entrepreneurs must be registered and must document the entire production process (in accordance with organic production standards in Kosovo);
3. Collection centres - addressing the needs of both collectors / producers and buyers, create of an effective collection and grading system to supply processors / exporters with raw material and potentially generate higher returns throughout the supply chain;
4. Primary Processors/exporters - enterprises that perform initial processing of raw materials, which are packaged in large packaging (semi-processed products) and then sold to other participants – processors on more complex processing of MAP plants in the value chain or export mainly in EU market;
5. Processors – processes usually herbal teas or tea, package in new small packaging and then delivered to the domestic market.

## THE VALUE CHAIN OF NWFP AND MAP SECTOR



### 2.1 Non-Wood Forest Products (NWFP)

Harvesting of NWFPs is the collection of plant material from wild springs, which can be in many forms, such as leaves, fruits, plants, flowers, trees or roots. It can be collected from many places, including open pastures, farmland, gardens, land on the road or forest land. The bulk of the marketed material (domestically and internationally) is still wild harvested.

Kosovo is particularly favourable for NWFPs collection as it has a long tradition in the collection of wild mushrooms, aromatic and medicinal plants, and berries. The altitude and terrain configuration are favourable for the collecting activities and cultivation of some species of wild fruit and medical plants. In recent years, due to the support by different donor initiatives in Kosovo the collection of NWFPs have developed much faster. About 95% of the total amount of NWFPs collected is mainly exported to the EU and neighboring countries. Regarding the organic certification of NWFPs, Kosovo is divided into five zones certified for organic collection. A total of 373,488 ha is certified for the collection of organic NWFPs, presented in Table 1.

**Table 1: Certified areas for NWFP organic collection**

No.	Certified zones	Areas (ha)
1	Istogu (Alpe 1)	35,000
2	"Shala- Bajgorë- Llap"	36,000
3	"Lipë-Rugovë-Deçan-Gjakovë (Alpe-2)	62,488
4	MaleteSharrit1 and 2(Has, Dragash, Opojë, Brezovicë, Luboten)	110,000
5	Gollaku (Novobërdë, Gjilan, Viti, Kamenicë)	130,000
<b>Total</b>		<b>373,488</b>

Source: Albinspekt, 2016



Operators involved in collection of NWFPs must apply for a license to the Department of Forestry of the MAFRD. In addition to the licensing, companies which are interested in getting organic certification for NWFPs must obtain the document issued by the Kosovo Forrestry Agency confirming that the areas where NWFPs are collected have not been treated with pesticides in the last three years.

The first license with organic certification for the collection of organic NWFPs was issued in 2009, and the number of companies with organic certification has increased significantly. Currently, the number of licensed companies with organic certification for collecting organic NWFPs is higher (18) compared to licensed companies (17) as presented in Table 2.

**Table 2: Number of licensed companies and companies with organic certification for collecting organic NWFPs**

Year	No. of companies licensed by MAFRD	No. of companies with organic certification
2014	33	1
2015	41	2
2016	23	5
2017	17	18

Source: MAFRD – Department of Forestry & Local Expert

The yearly quantities of organic NWFPs collected has been increased constantly as result of development of the capacities of processors and exporters including creation of links with new buyers and markets mainly to EU countries; exports in quantities were presented in the table 3.

**Table 3: Collection of organic NWFPs**

Year	2009	2010	2011	2012	2014/15	2016
Amount (ton)	550	600	900	1,000	1,500	2,200

Source: MAFRD

## 2.2 Medicinal and Aromatic Plants (MAP)

Medicinal and aromatic plants are used for diet, cosmetics, and in pharmaceutical industry, which is constantly increasing interest in certain plant species. This has led to significant increases in the use of MAPs in the last few years, especially in Western European countries as well as in Asian countries such as India and China.

Estimates indicate that Europe is commercially marketed with at least 2,000 kinds of medicinal and aromatic plants, of which 1,200 to 1,300 are of European origin. Increasing demand for medicinal and aromatic plants simultaneously increased pressure on natural resources. According to the European Plant Conservation Strategy (EPCS, 2002-2007), 90% of European plants and aromatic plants originating from Europe are still collected directly from the nature.

According to the International Standards for the Sustainable Collection of Medicinal and Aromatic Plants (ISSC-MAP), the major threats to the population of medicinal and aromatic plants are excessive harvesting and loss of habitats, including land conversion for agricultural and other purposes.

There were some initiatives of MAP production in Kosovo in beginning of year 2000 where farmers diverted some cultivated area from vegetable to medicinal and aromatic plants. Traditionally, plants were harvested from remote areas, or within small farms. Demand for these plants until a few years ago was constant, when their use increased, leading to price increases until the offer was unable to keep up with the demand. Many plants, which are traditionally collected as a wild, are now cultivated.

### Advantages and disadvantages of growing MAPs

The cultivation of MAPs has definitely great market potential, but it needs to be promoted through the prism of advantages and disadvantages, shown in table 4.

**Table 4: Advantages and disadvantages of growing MAP plants**

Advantages	Disadvantages
Presence of laws and regulations for organic production approved by the Government	Lack of modern technological knowledge, both in the field of agriculture in general and in the field of MAP production, especially as per the organic production standard.
Large areas of unpolluted agricultural land, which accelerates and facilitates the return of conventional products to organic ones as a prerequisite for the development of the MAP sector	Disadvantaged structure of agricultural holdings (large number of small farms not cooperating with one another)
Decrease of uncontrolled harvest of self-extracting MAP plants and plant resource protection	The cultivation of MAP plants usually requires the engagement of a large number of workers (high costs and lack of workforce in some rural areas)
Greater economic gain compared to the traditional cultivation of crops	Seed and planting material is more difficult to purchase compared to vegetable crops
Safer placement on the market in relation to fruit and vegetable products	Local producers are poorly aware of MAP plant breeding technology
Establishment of plantations of new plant species	Expensive MAP plant processing equipment
The organic cultivation of MAP plants requires no application of artificial fertilizers and pesticides	A small number of MAP plant farmers produce insufficient quantities to enter the world market
Links with the markets for organic products in Germany and Switzerland exists	Specific and expensive equipment for harvesting of certain plant species

In 2016 about 170 ha of cultivated MAPs are certified as organic, with 16 different cultivated species, presented in the table below. In 2017, the certification process of these farmers and companies was supported by the PPSE project, in cooperation with the association "ORGANIKA".

**Table 5: Certified organic MAP cultivated areas**

Year	2009	2010	2011	2012	2014/15	2016
Area (ha)	5	15	70	85	150	160

Source: MAFRD

## 3. SURVEY RESULTS

### 3.1 Methodology

This report provides an overview of the NWFP and MAP sector development and their requirements in order to highlight opportunities that exist and to indicate needs to expand these opportunities further. For the survey, relevant studies and data related to the NWFPs and MAPs were reviewed. Consultation and exchange of information was carried out with several persons directly involved in the NWFPs and MAPs collection, production, processing and distribution as well as with experts.

A questionnaire was prepared in accordance with GIZ and ORGANIKA representatives. Through the questionnaire, ORGANIKA intended to collect up-to-date information on the following issues: the employment in the sector and their gender, capacities of collection centre and processors, storage capacities, their exports and exporting countries, future potential for export and targeted markets.

The information collected through interviews with 32 operators was essential for the development of the report and preparing recommendations for the sector development aiming to improve competitiveness of the value chain.

A meeting with the representatives of MAFRD helped to analyse the existing business environment and the aspect of institutional support. Information related to access to capital was gathered through different information's provided by the banking sector companies active in Kosovo. In addition, for the organic certification opportunities of the NWFP and MAP sector, Albinspekt, a certification body operating in Kosovo, was interviewed.

The report provides information on the key issues associated with NWFP and MAP production, processing and marketing and identifies some of the key constraints to be overcome in order to successfully produce and export NWFPs and MAPs. The study makes some conclusions that are important before considering any significant investment in the sector.

### 3.2. The outcomes

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#### a) Employment at NWFP and MAP sector

Collection, production and processing of NWFPs and MAPs can absorb a significant number of workforces, especially in rural areas; as evidenced by the survey results in 32 interviewed companies, employ 196 full time employees and 541 seasonal workers.

The average working activity of the surveyed companies is 5.5 years, full-time - 6.1 employees, and 16.9 seasonal workers per company.

Data on women employment are relatively high, where women full time employees are 46.9%, and as seasonal worker women participate with 58.4%.

Young people aged 18 to 30 employments are 48.5% full time and 58.4% seasonal, which is extremely helpful employment opportunity for young people. Also, this sector provides ideal working opportunities for minorities with 15.8 % full time respectively 14.6% seasonal workers. The data of full time and part time employment are also presented in the table 6. below.

Table 6. Employees' number and structure

No.	Full time					Seasonal					
	Total	Women	Men	Young (18-30)	Minorities	Total	Women	Men	Young (18-30)	Minorities	
Total	196	92	104	95	31	541	316	225	224	79	
Employees Structure in %		46.9	53.1	48.5	15.8		58.4	41.6	41.4	14.6	
	Company years	Full time	Women	Men	Young (18-30)	Minorities	Seasonal	Women	Men	Young (18-30)	Minorities
Min	1	0	0	0	0	1	0	3	1	1	1
Max	28	43	21	29	31	20	105	100	60	52	30
Average	5.5	6.1	4.4	3.9	5.3	6.2	16.9	14.8	10.7	9.0	7.2

## b) International standards

Considering the fact that most of NWFPs and MAPs are export oriented mainly to EU countries, interviewed companies declared that they give adequate attention for implementation of the quality and safety standards in the whole process beginning from the selection of propagation material to the final product. From the survey results 90.6% of the interviewed companies are certified based organic standard<sup>1</sup> with the validity period for the certification is in most cases given for one year; only 9.4% are not certified based on organic standard.

Only two of the thirty-two companies have stated that they are certified with HACCP and ISO standards, while three of the interviewed companies stated they plan to be certified for BioSuisse and Demeter standards in 2019.

Table 7. International standards of the interviewed companies

Standards	Percentage
Organic	90.6
HACCP	6.3
HACCP in process	3.1
ISO 22000	6.3
ISO 22000 in process	3.1
Planned	
Bio Suisse	12.5
Demeter	6.3

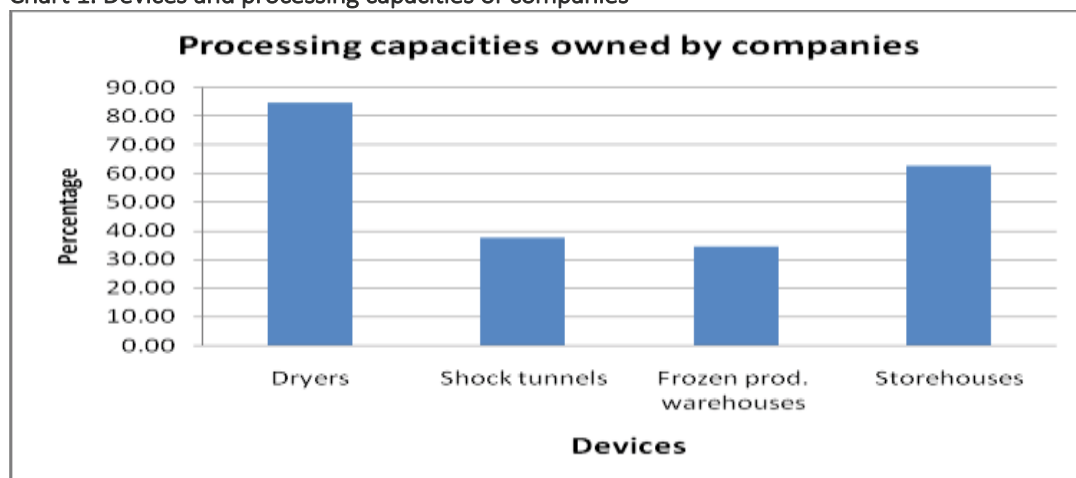
## c) Processing capacities

The processing lines are key for companies to be able to meet requirements of buyers in export market. From the surveyed companies 84.4% have dryers, 37.5% have shock tunnels, 34.4% have frozen products storages and 62.5% have storehouses.

<sup>1</sup> Equivalent with EEC regulation 834/2007 for organic agriculture



Chart 1. Devices and processing capacities of companies



The average processing capacity currently used of surveyed companies is 56.7%. The average of the drying area for the companies that own dryers is - 53.65 m<sup>2</sup> with capacity of 2.8 tons/day; shock tunnels 31.57 m<sup>2</sup> with capacity of 9.21 tons; warehouse for frozen products 263.5 m<sup>2</sup> with capacity of 235.5 tons and 310.6 m<sup>2</sup> warehouse of 71.15 tons capacity. The data are presented at the table below.

Table 8. Processing capacities of interviewed companies

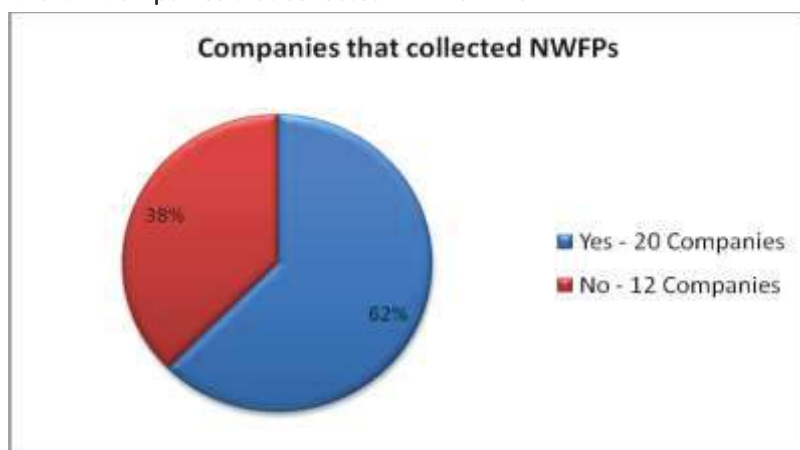
	Processing capacity current use (%)	Dryers		Shock Tunnel (- 40°C)		Storage of frozen product (- 20 °C)		Storehouses	
		Area (m2)	Capacity (tons)	Area (m2)	Capacity (tons)	Area (m2)	Capacity (tons)	Area (m2)	Capacity (tons)
Company devices (%)		84.4		37.5		34.4		62.5	
Total		1,448.5	72.9	221.0	64.5	2,898.5	2,591.0	6,212.0	1,423.0
Min	30	2.5	0.04	12	1	16	4	20	5
Max	100	400	25	60	20	1585	1500	1600	400
Average	56.7	53.65	2.8	31.57	9.21	263.5	235.5	310.6	71.15

Eight respondents have expressed the lack of processing capacities as a limiting factor in expanding production, mainly the dryers that have to be available for cultivation of MAP, since drying of MAPs has to be done immediately after the harvest.

#### d) Collection of NWFPs

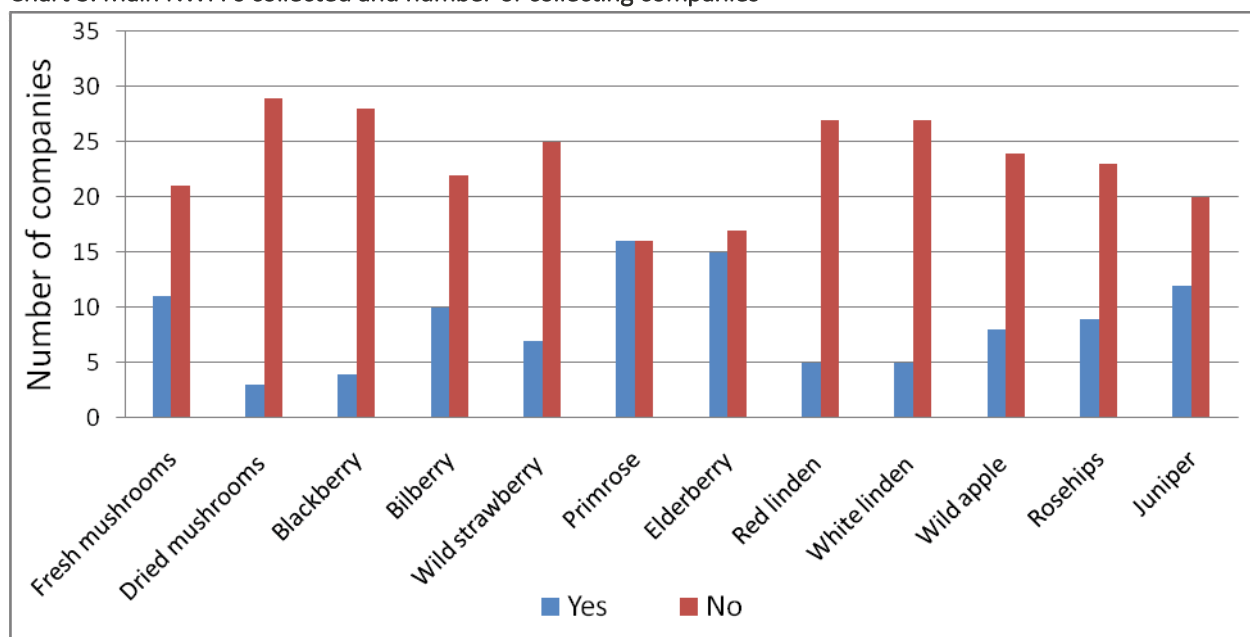
Data collection of this study confirmed that there is a plentiful diversity and quantity of NWFP, as there have been 31 species collected with a total amount of 2,357 tons. From 32 interviewed companies, 20 companies have collected NWFPs in 2017, and other 12 companies were dealing only with MAPs, as presented in a chart below

Chart 2. Companies that collected NWFPs in 2017



There is a specialization of collectors for collection of certain types of NWFPs, presented in the table 9 and chart 5, of which species that dominate are juniper berries, bilberries, blackberries, rosehips, wild apples and mushrooms.

Chart 3. Main NWFPs collected and number of collecting companies



Varieties and quantity of collected NWFPs in 2017 from 20 companies out of 32 interviewed are presented in the table below.

Table 9. Types and amounts of collected NWFPs in 2017

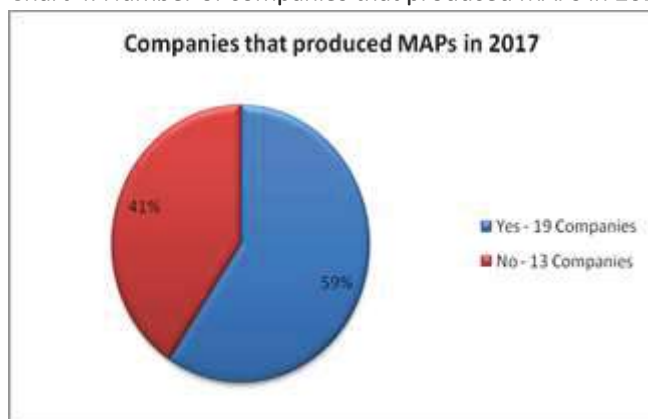
No.	NWFPs	Quantity (kg)
1	Fresh mushrooms	446,900
2	Dried mushrooms	14,200
3	Blackberries	267,000
4	Bilberries	475,000
5	Strawberries	25,500
6	Cowslip	20,656
7	Elderberries	34,963

8	Red linden	3,305
9	White linden	3,154
10	Forest tea	100
11	St John's wort ( <i>Hypericum perforatum</i> )	2,900
12	Common yarrow	5,450
13	Melissa	100
14	Nettle	1,810
15	Dandelion leaf	50
16	Dandelion root	20
17	Chicory	50
18	Hawthorn	400
19	Wild apples	164,700
20	Rosehips	258,350
21	Blackberry leaves	11,637
22	Daisy	250
23	Juniper berries	569,636
24	Thymus	350
25	Wild pears	1,200
26	Silver Birch	3,000
27	Balsam	4,000
28	Cornelian Cherries	23,000
29	Raspberry leaves	11,273
30	Equisetum	7,500
31	Alchemile	560
<b>Total</b>		<b>2,357,014</b>

#### e) Production / Cultivation

From 32 interviewed companies, 19 companies have been involved in cultivation MAPs in 2017 (59% of total 32 companies) versus 13 companies were dealing only with collection of NWFPs (41% of total 32 companies), presented in the chart below.

**Chart 4. Number of companies that produced MAPs in 2017**

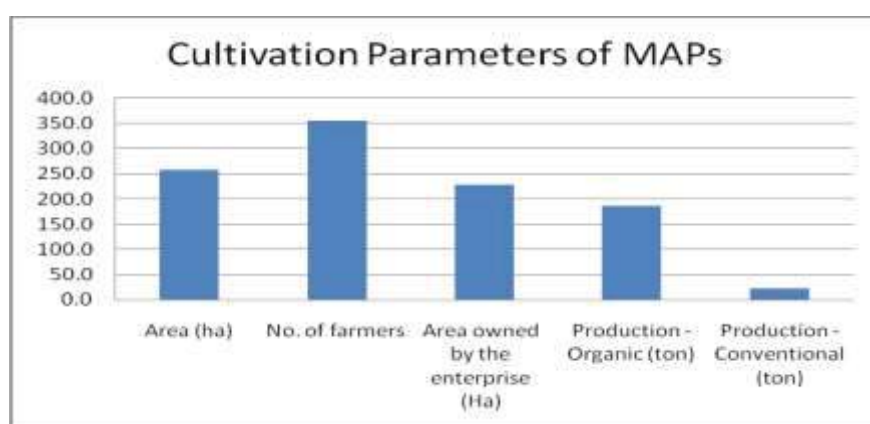


In 2017, 258.8 ha of MAPs were cultivated, out of which 88.5 % of cultivated areas are owned by the enterprises. There were 186.4 tons of organic MAPs produced and 22.2 tons of conventional. Number of farmers involved in MAPs cultivation from 19 companies was 355, presented in the table and the chart below.

**Table 10. MAPs cultivated parameters in 2017**

Cultivation Parameters of MAPs	Values
Area (ha)	258.8
No. of farmers	355.0
Area owned by the enterprise (Ha)	229.1
Production - Organic (ton)	186.4
Production - Conventional (ton)	22.2

**Chart 5. MAPs cultivated parameters in 2017**



#### f) Agricultural machinery

Mechanization is a crucial in the production of MAPs and is one of the factors that enable farmers to produce crops more efficiently by using less power. Increasing the power supply of MAPs production means that more tasks can be completed efficiently, and greater areas can be farmed to produce higher quantities of crops while conserving natural resources.

Sustainable agricultural mechanization can also contribute significantly to the development of value chains as it has the potential to render postharvest, processing and marketing activities and functions more efficient and effective.

From the data gathered, it can be concluded that agricultural machinery available is at a low level. Only 12 interviewed companies have a tractor, while 3 companies own the combine harvester for chamomile (known as industrial MAP due to the need for machinery) which is key for expansion of areas.

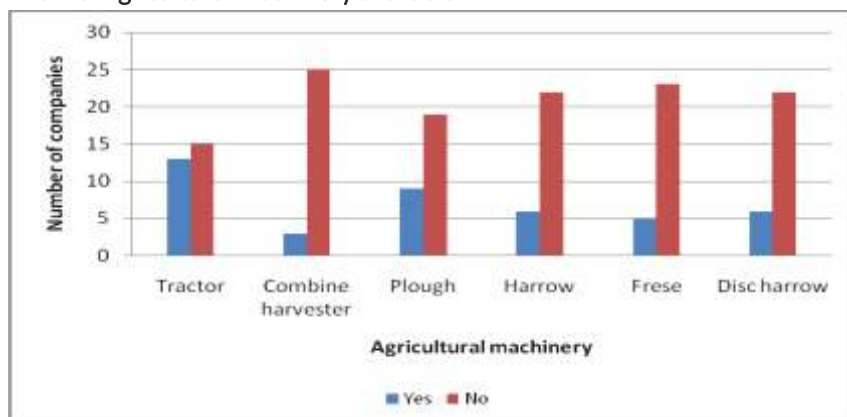
There is a lack of other necessary machines as shown in the table and chart below. Agricultural equipment is needed for MAPs production, but this situation can be improved if machinery is leased or joint agricultural machinery is purchased, especially harvesters.

**Table 11. Agricultural machinery available**

Machinery	Tractor	Combine harvester	Plough	Harrow	Freeze	Disc harrow
Available	12	3	9	6	5	6
Not available	20	25	19	22	23	22



Chart 6. Agricultural machinery available

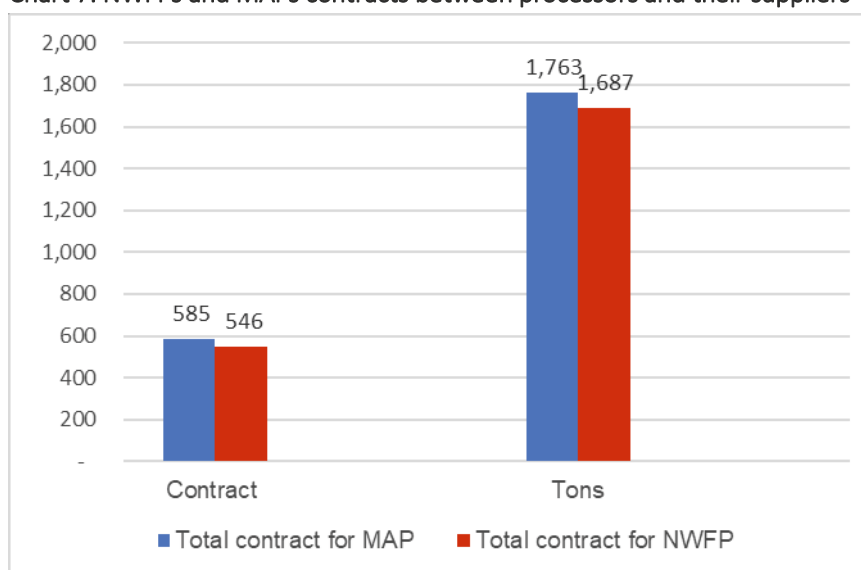


### g) Contracts

The interviewed companies stated that they require from the suppliers to collect high-quality NWFPs and to produce high-quality MAPs, using appropriate cultivation methods, as the products must compete in a highly competitive international market. For this reason, both for collection and cultivation is done mostly under contract farming between primary processors/exporters and their suppliers of the products (raw material) including both collectors/farmers and collection centres. In addition, data for number of farmers without contracts was also collected.

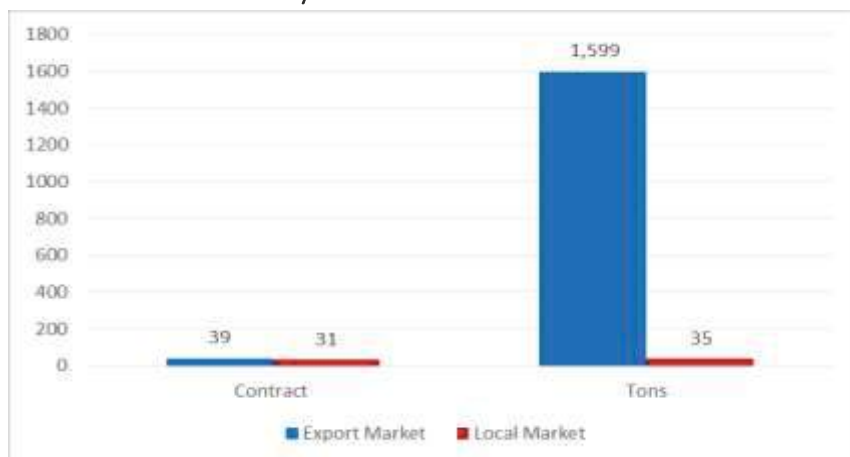
In 2017, the total number of contracts signed between processors/exporters and their suppliers including collection centres, collectors of NWFP and farmers for MAP was 1,131; out of which 585 contracts were for the MAP or 48% and 546 contracts were signed for the NWFP or 52%. In addition, processors/exporters have bought products without contracts; the total number of collectors/farmers that supplied products without contracts was 2,145; out of which 2,139 were collectors of NWFP or 99.97% were collectors of NWFP and only 6 MAP farmers. This is an indicator that MAP cultivation is almost 100% done by contracting production, while the collection on NWFP was contracted only half of the collected quantity, other half was supplied by collectors that had no contract.

Chart 7. NWFPs and MAPs contracts between processors and their suppliers



Regarding the market, in total were signed 70 contracts including 39 contracts with international buyers for six EU countries and three regional countries for total quantity of 1,599 tons or 98% of the total quantity sold. For the local market, 31 contracts were signed for the quantity of 35 tons of final products or 2% of total quantity sold. See the chart below:

**Chart 8. Contracts with buyers in international market and local market**



The table below shows that in NWFP sector from the total number of interviewed companies, 12 companies are involved in contracts with collection centres with 107 signed contracts in total, and the quantity of contacted NWFPs was 1,298 tons. Number of companies involved in contracts with collectors was 13 with a total of 439 contracts and contracted quantity was 389 tons. While, 2,139 collectors have supplied 10 processors /exporters with NWFP without contracts; the total quantity supplied was 2,247 tons

**Table 12. NWFP contracts**

Collection of NWFP - Contracts with suppliers			
	Contracts with Collection Centres	Contracts with collectors	Collectors without contracts
No of Companies contracting	12	13	10
# of contracts	107	439	2139
Contracted quantity (tons)	1,298	389	2,247

The MAP sector is characterized by small number of companies involved in contracting; six companies have signed a total number of 585 contracts. Total contracted area of 376.5 ha with a production of 81 tons of organic and 1,650 tons of conventional products. Only one company bought 60 tons of MAPs from six farmers without previous signed contracts.

**Table 13. MAP contracts**

Cultivation / Contracts for medicinal and aromatic plants		
	Contracts with Collection Centres	Farmers without contracts
No of Companies involved in contracting	6	1
# of contracts	585	6
Total contracted area (Ha)	377	6
Quantity organic (ton)	81	0
Quantity conventional (ton)	1,650	60

Regarding contracts with buyers it was signed between 6 exporters and buyers in international markets mainly in EU countries as follow: Germany – 5, Austria - 3, Switzerland - 2, Holland - 1, Italy - 1, Hungary – 1 and Check Republic - 1. Other contracts from the regional countries are Montenegro - 1, Serbia - 1, Macedonia – 1. One contract was signed for export in USA

**Table 14. Contracts with export markets / buyers**

Contract with buyers in international market	
No of Companies involved in contracting	6
No. of contracts	39
Quantity contracted (ton)	1,599

In regard to contracts between final (tea) processors and supermarkets in Kosovo, two companies have signed in total 31 contracts with total contracted quantity of 35 tons. In addition, one tea processor sells 0.6 tons without contracts and a producer of champignons sells 60 tons to supermarkets without contracts.

**Table 15. Contracts with local markets**

Contract with buyers in international market	
No of Companies involved in contracts	2
No. of contracts	31
Quantity contracted (ton)	35

## h) Investments

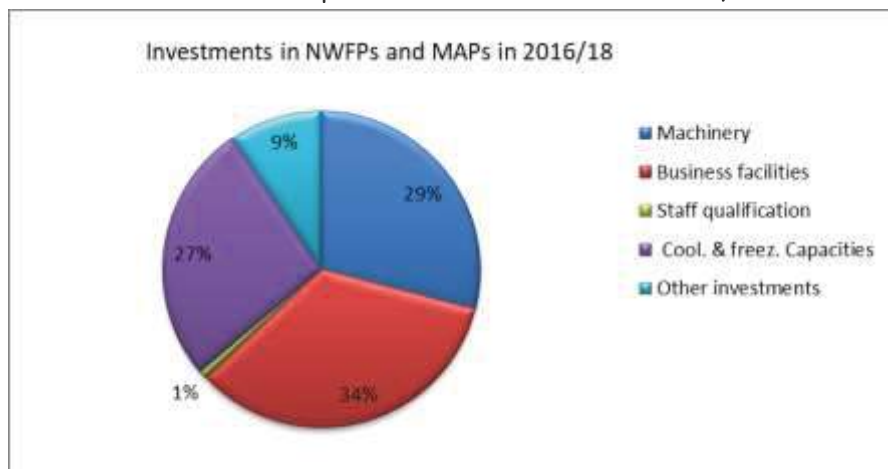
Most of the interviewed companies have invested in their business activities. In the last years, there was a quite large support from MAFRD and donor agencies to the sector that has complemented processors / exporter's investments. The investments from the companies in the NWFP and MAPs sector, for 2016-2018, were allocated as presented below:

**Table 16. Investments in NWFP and MAP sector by companies**

Investments in NWFPs and MAPs business in 2016/18 (EUR)						
Parameters	Total investment	Processing machinery	Business facilities	Staff Qualification	Cooling & Freezing capacities	Other investments
<b>Companies</b>	30	25	25	20	8	17
<b>Total value (€)</b>	4,535,700	1,317,500	1,541,000	38,800	1,207,900	430,290
<b>Min</b>	1,000	800	1,200	400	400	200
<b>Max</b>	1,100,000	300,000	600,000	6,000	700,000	150,000
<b>Average</b>	151,190	52,700	61,640	1,940	150,988	25,311

Table above shows that from the total number of 32 interviewed companies, 30 have invested in their businesses for the period of 2016/18 at total value of € 4.5 mio. Companies have mainly invested in machinery and business facilities (processing spaces and warehouses) - 25 companies have invested € 1.32 mio. in processing machinery or 29% of total investment and 25 companies have invested € 1.54 mio. in business facilities or 34% of total investment; in the staff qualification 20 companies invested € 38.800 or less than 1%; for the cooling and freezing capacities 8 companies have invested € 1.20 mio. or 27% and 17 companies invested in other investments in total € 0.43 mio or 9% of total investment in the sector.

Chart 9. Investments of companies in NWFPs and MAPs for 2016/18



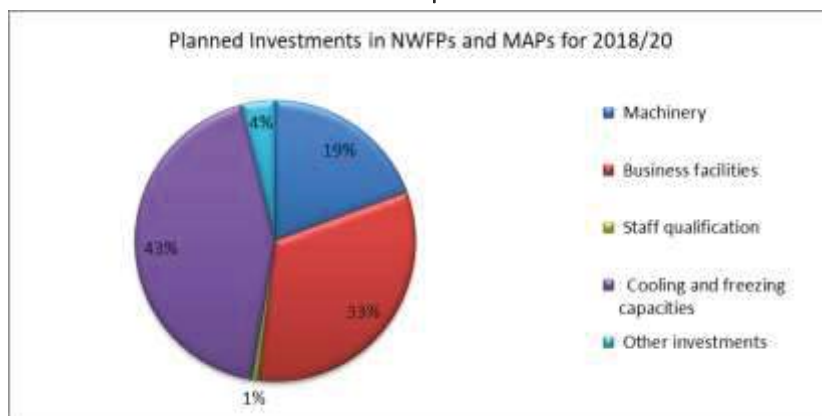
### Plans for the investment

During the interviews, besides the collection of data regarding past investments, the companies were asked for the planned investments for future – this represents their needs for the investments for 2018 - 2020. 19 companies in total plan to invest € 4.25 mio; again, the highest investment is planned to expand the cooling and freezing capacities and business facilities; for the cooling and freezing capacities were planned € 1.85 mio. or 43% and for business facilities € 1.38 Mio. or 33%. Machinery investments are planned to be € 0.83 mio. or 19%, while for the staff qualification is planned to be invested less than 1% of the total investments.

Table 17. Planned Investments in NWFPs and MAPs business for 2018/20

Planned Investments in NWFPs and MAPs business for 2018/20					
Parameters	Machinery	Business Facilities	Staff Qualification	Cooling and freezing capacities	Other investments
Companies	19	18	16	9	4
Total value	825,500	1,383,000	34,600	1,845,500	167,000
Min	2,000	7,000	500	5,500	2,000
Max	200,000	500,000	6,000	1,000,000	150,000
Average	45,853	76,833	2,163	205,056	41,750

Chart 10. Planned Investments of companies in NWFPs and MAPs business for 2018/20





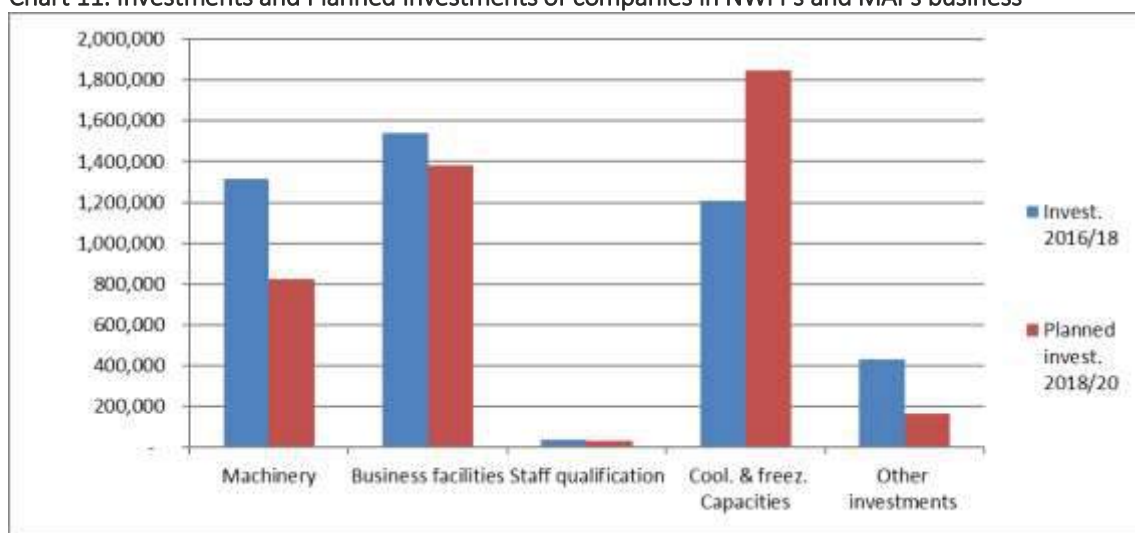
The opportunities emphasised by the processors/exporters for future investments are the investments in expanding capacities for production, investment in semi-processing and packaging of the products. To complete future investments, there is a need to invest in capacity building of staff through study tours and mentoring by export specialists. Until now, many companies in NWFP and MAP sector has used the opportunities of capacity building through the support of different institutions and will remain important in future.

Interviewed companies mentioned that the exporting opportunities could also be extended through the development of a network of experienced exporters to help mentor and partner with aspiring exporters in order for Kosovo to become an important exporting country. There is no risk for increase of competition of Kosovo exporters since currently there are a lot of export opportunities for the NWFP and MAP sector.

The companies cited that profitable NWFP and MAP operations are becoming more sophisticated, with a greater use of advanced technology, especially in storing, cooling and freezing.

However, investments in these facilities is expensive, as seen from the gathered data, and to be able to take advantage of new technologies there is a need for information gathering or sharing and business planning skills to select the right devices in order to use in maximum their technical build capacity.

**Chart 11. Investments and Planned Investments of companies in NWFPs and MAPs business**



From the table above, the difference between current and future investments, is that companies plan to invest less in machinery and business facilities, and more in cooling and freezing capacities. From the total number of 32 interviewed companies, only 7 companies have invested in cooling and freezing capacities compared to planned investment, where 9 companies plan to invest in cooling and freezing devices.

### Financial sources for the investment

Interviewed companies have invested and plan to invest from different sources such as incomes, donor and MAFRD grant support, credits from commercial banks, joint investments with funds from diaspora and micro-finance mainly for small entrepreneurs.

Concerning the small businesses in the sector, family savings and incomes from the current business helped these families to consolidate their assets, allowing them to generate more incomes and more investment in the NWFP and MAP sector. According to small farmers, to increase their production capacities is difficult only

with savings and micro-credit, since they need much larger amounts of investments. For this reason, small farmers will continue with the current level of production and investments, but there is an opportunity for the new businesses to invest in the sector.

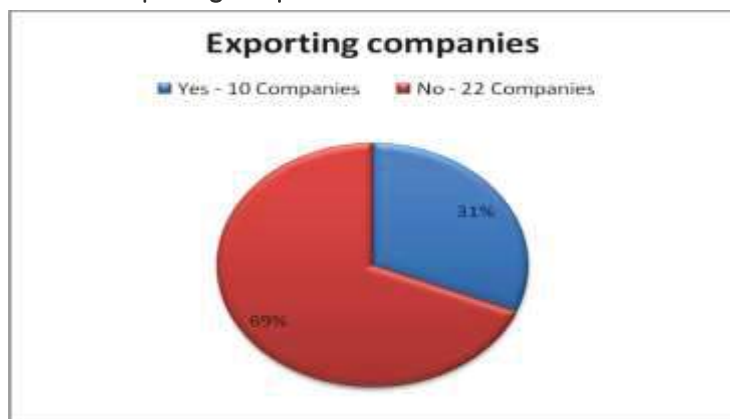
Credit from the bank is one of the important inputs in development of mainly MAP sector and consequently in employment generation. Timely and adequate credit supply can ensure better use of technology and farm inputs in NWFP and MAP operations.

## i) Market

The main advantage of the exporters of NWFP and MAPs is the ability to find new markets for their products, including different international markets and different industries. Most of the surveyed companies have specialized in specific products and they are willing to expand the varieties cultivated in order to export more quantities.

From the 32 surveyed, 10 companies have exported products mainly to EU market, presented at the chart below. In 2017 there were total **exports of 2,950 tons with a value of 5,810.890 Euros.**

**Chart 12. Exporting companies of NWFPs and MAPs**



Other companies currently have no capacity (warehouses, machinery, standards), and have no contacts with the international market, but they have been developing gradually. However, these smaller companies are collecting and producing NWFP and MAPs and sell them to the larger exporting companies.

Exporters have their own farms or cooperate with farmers through contract farming. This is particularly beneficial as it allows exporters to closely monitor the planting of seedlings, harvest and post-harvest practices; important features in products with strict regulations that require all exporting farms be certified.

In terms of services offered, roughly 50% of exporters offer services such as: advice on good farming techniques, provision of the seedlings, harvest and post-harvest handling techniques. As such, the organic certification processes are most common services from exporters that affect increase of the quality and the revenue of the crop.

For standards that products apply, six companies export **organic products** directly to EU market with an average of 84,5%. Two companies export directly to the non-EU market with an average of 11%, one company exports directly to the regional market 20% of the produce and 15 companies sell their products to the local market/collection centres with an average of 86.9%. About to the **conventional products**, eight companies export to EU market with an average of 62.5%, five companies export to the outside EU market with an

average of 17%, three companies to the regional market with an average of 39% and ten companies sell to local market/collection centres with an average of 77.5%.

Regarding the local market, organic products are sold to the collection centres from where product has been exported to the EU market.

**Table 18. Organic and conventional exports in %**

Parameters	Organic products Total Export (%)				Conventional products Total Export (%)			
	EU market	Non-EU market	Regional market	Local market	EU market	Non-EU market	Regional market	Local market
No. of Companies	6	2	1	15	8	5	3	10
Min %	55	2	20	3	30	0.2	20	5
Max %	100	20	20	100	100	40	70	100
Average %	84.5	11	20	86.9	62.5	17.04	39	77.5

Table above shows that organic products are exported mainly to the EU market and local market/collection centres from where product has been exported to the EU market. The conventional products are mainly exported to the non-EU markets and to the regional market.

For the product type exported the table below shows that 15 companies sell their product as raw material, 16 semi processed products and five companies sells are as a final product. Future sales are like the current sales.

**Table 19. Product type - past and future - Forms of Sales in %**

Parameters	In past – Product type Sales %			for future – Product type sales %		
	Raw Materials	Semi-processed products	Final products	Raw Materials	Semi-processed products	Final products
Companies	15	16	5	10	15	10
Min	10	23	40	20	30	10
Max	100	100	100	100	100	100
Average	75.5	79.6	78	70	77.3	54

Data show that there are mainly five types of plants collected and exported as raw material and semi processed products, while other plants are collected in small quantities. The chart below shows that:

**Chart 13. Collected NWFP & MAP Exports in 2017**

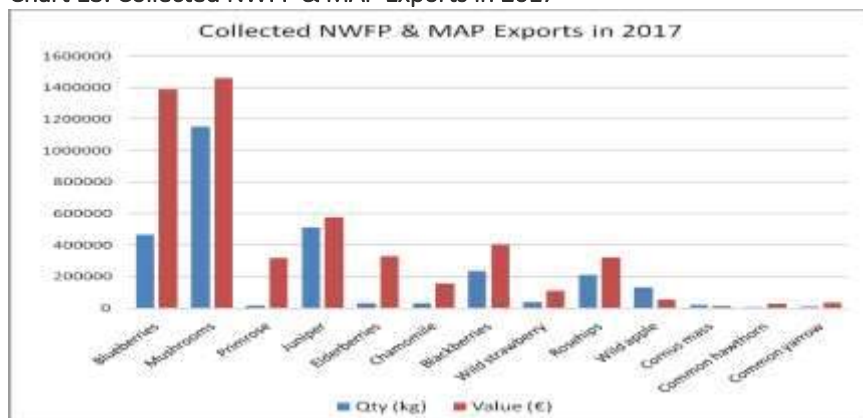


Chart 14. Product type - past and future - Forms of Sales in %

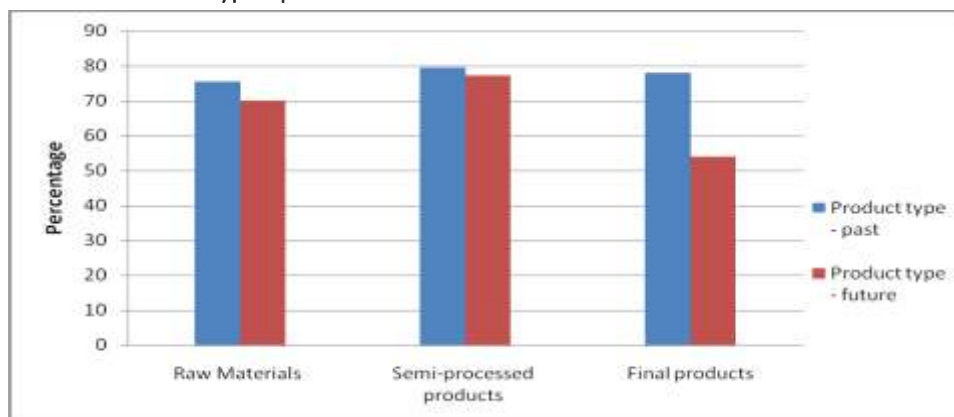


Chart above shows that the product type of sales currently and in future are almost the same for raw material and semi processed products, but the sales as a final product in future is declared to be lower than current sales mainly due high competitiveness in the market – basically the Kosovo’s companies have difficulties to compete with EU processors. e.g. German processors, in retail market.

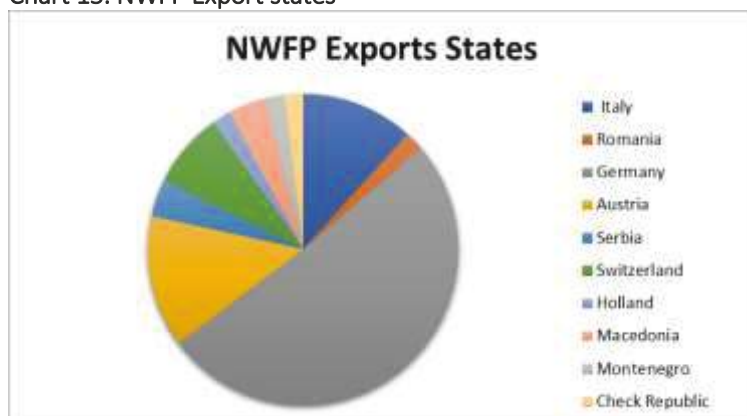
Table 20. NWFP & MAP Exports in 2017

NWFP & MAP Exports in 2017		
Collected	Qty (ton)	Value (€)
Mushrooms	1154.3	1,462,400
Bilberries	469.0	1,391,000
Juniper berries	513.0	578,500
Blackberries	236.0	407,200
Elderberries	33.5	329,550
Rosehips	211.2	322,700
Cowslip	18.5	320,400
Wild Strawberries	14.0	66,700
Wild Apples	132.0	53,600
Common yarrow	9.8	36,800
Common hawthorn	6.5	29,440
Cornelian berries	23.0	14,200
<b>Sub total</b>	<b>2,847.7</b>	<b>5,055,690</b>
Cultivated	Qty (ton)	Value (€)
Common mallow	9.4	192,000
Chamomile	33.0	160,000
Cornflower blue	12.8	153,600
Calendula	6.4	80,000
Leek	9.6	48,000
Oregano	11.2	44,800
Mint	9.5	38,400
Nettle	10.1	38,400
<b>Sub total</b>	<b>102.0</b>	<b>755,200</b>
<b>Total</b>	<b>2,949.7</b>	<b>5,810,890</b>

The main states NWFP are exported to are Germany, Austria, Italy, Switzerland and some of the interviewed companies stated that they export to non-EU countries. Chart below shows:

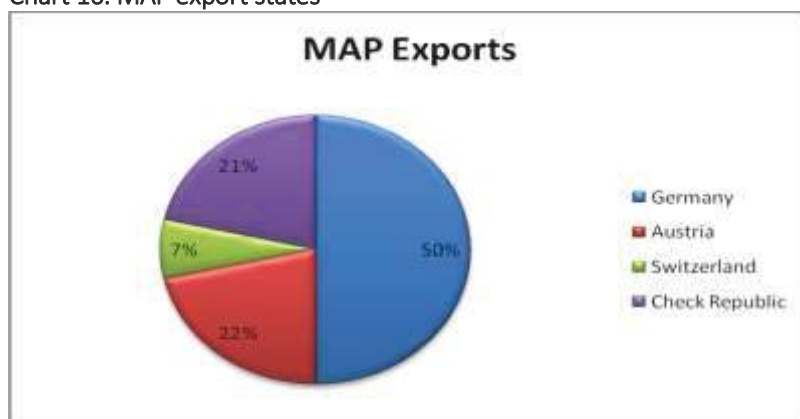


Chart 15. NWFP Export states



MAPs are exported mainly to Germany, Austria and Check Republic, and a small quantity to Switzerland. Chart below shows:

Chart 16. MAP export states



Regarding local market<sup>2</sup>, from the total number of 32 interviewed companies, 4 of them sell final products to the retailers for the local market.

Table 21. NWFP & MAP Sales to the Local Market in 2017

NWFP & MAP Sales to Local Market in 2017		
Products	Qty (kg)	Value (€)
Mushrooms champignons	60,000	150,000
Tea (final product)	8,500	185,000
<b>Total</b>	<b>68,500</b>	<b>335,000</b>

The total sales in 2017 of the NWFP and MAP was 3,018 tons or at value of € 6.1mio. Out of total quantity sold, 2,950 tons was exported or 97.7% at value of €5.81 mio. or 94.5%; while in the local market was 68.5 tons or 2.3% at value € 0.33 mio or 5.5%.

<sup>2</sup> Only products sold to Kosovo consumers were presented. Sales of CCs to processors were not presented to avoid double counting of sales – a product sold to processors and the same products was exported



Chart 17. Sales to export vs Local market in 2017

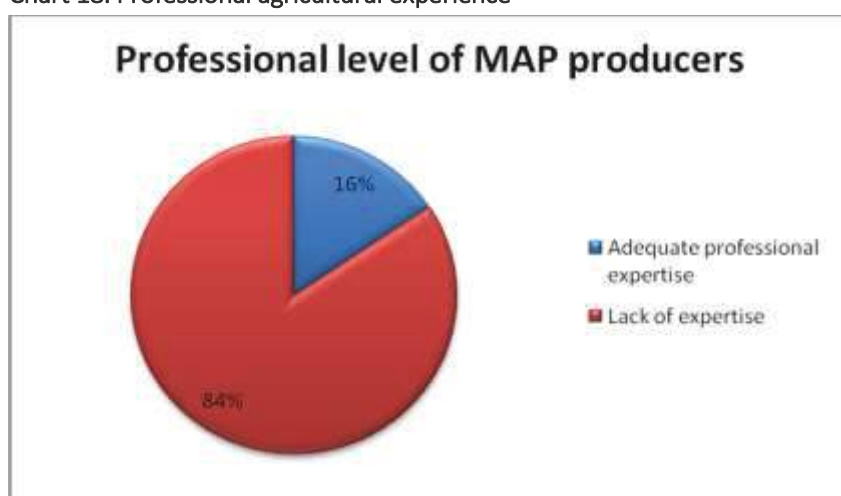


#### j) Professional level of the actors of the MAP sector

The production and processing of MAP is very diverse and often combined with other business activities. There is need for knowledge for production by farmers, use of modern technology from processors and implementation of an interactive model of networking systems, which integrate knowledge production, adaptation, advice and education.

After starting interviews with MAP producers, we found out the need that besides other data, to also, collect data for the professional expertise and experience of interviewed companies. From the total of 32 respondents, five (5) of them (companies that have longer experience in the sector) stated that they have experience and expertise on production and processing of MAPs. Other 27 respondents lack the professional expertise in production and prepare of documentation for organic certification - presented in the chart 1; the basic information they have now it was gathered from the main companies of the sector. These 27 companies, also, indicated that they do not have enough support from local agronomists and extension services of local and central government because their services are oriented more to the general agricultural production rather than production of MAPs.

Chart 18. Professional agricultural experience

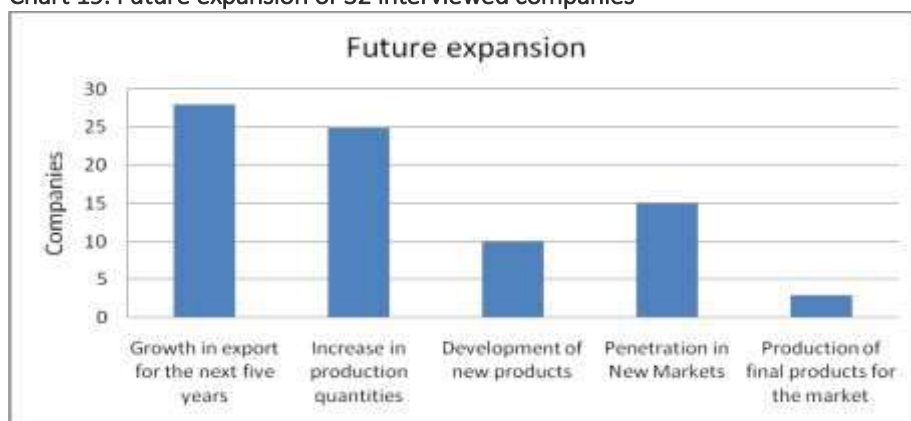


The conclusion is that institutions that support agribusiness in Kosovo are not specially designed for providing specific trainings on developing skills even though that companies need trainings for different skills to acquire, starting from production skills of MAPs, to marketing, finance and accounting and elementary management. The specific skills are important for support of start-up entrepreneurs in the NWFPs and MAPs, because of the opportunities to invest in this sector.

### k) Future expansion

The survey data show that the further development of the NWFP and MAP sector in Kosovo has good perspectives and provides interesting opportunities for investors. For future expansion, the companies interviewed cited that they are focused more on the export expansion - penetration of new markets, increase production, but less focused on the development of new products and production of final products for the market; as presented in the chart below.

**Chart 19. Future expansion of 32 interviewed companies**

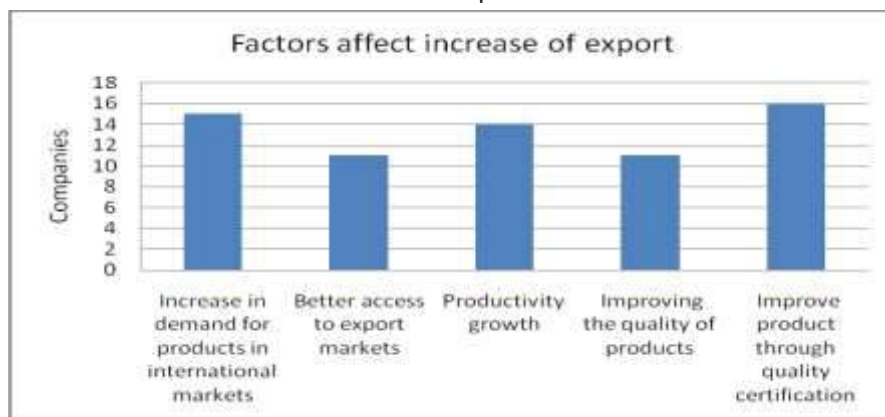


Regarding the future exports over the five years, most of respondents stated the export will be stable in future and the focus will be the export of organic products as raw materials.

Factors that affect increase of exports are complex and involve many activities and conditions, and the main ones are the improvement of product quality through certification, increase of demand for Kosovo's products in the international markets and growth in productivity.

The interest of Kosovo businesses is to export only the raw material as buyers in the EU market mostly demand raw materials, mainly due to fact that through processing they could secure superior quality of products.

Chart 20. Factors that affect increase of exports



Free trade agreements and market access represent a significant opportunity for growers and collectors with export aspirations to access markets. While significant progress has already been made, the need to fully exploit these opportunities remains a key priority.

#### 4. CONCLUSIONS

This report provides information on the main issues related to collection, production and marketing of NWFPs and MAPs for year 2017 and identifies some of the main constraints to overcome to successfully produce and export.

The advantage of collection of NWFP and production of MAP is the market side, as there is an increasing demand for NWFPs and MAPs, particularly for herbal products in the food, pharmacy and cosmetic industries since the growing tendency all over the world is to shift from synthetic to natural based products.

Collection, production and processing of NWFPs and MAPs have great potential in Kosovo, due to the experience of collectors/farmers in rural areas and the appropriate environmental conditions for production and collection. NWFPs and MAPs production and collection is closely linked to organic farming since market demands organic certified products. From the survey results 90.6% of the interviewed companies are certified for organic production.

Despite Kosovo's negative trade balance in general, there was a total export of 2,950 tons with a value of 5,810.890 Euros. Compared with the sales of products in the local market, 97.7% of products quantity or 94.5 % of the product value was exported.

NWFPs and MAPs are mainly exported as raw material, but a few of Kosovo companies started to export the final products to EU.

Interviewed companies have invested in total €4,474,897 in 2016/18, mainly in machinery-€1,086,200; business facilities-€1,367,000; cooling and freezing capacities-€1,107,900. The average processing capacity currently used is **56.7%**.

Producers recognize the benefits of a fixed contract due to the trust built with buyers and rely on them since payment was considered the most important feature, followed closely by a fair price.

Collection, production, and processing of NWFPs and MAPs absorbed a significant number of workforces, 196 full time employees and 541 seasonal workers.

## Recommendations for the development of the NWFP and MAP sector

Building human capacities within companies – development of the knowledge for new production and processing technologies is a continuous process, and it is necessary to organize trainings and workshops for producers with specific topics. It is also very important to continue support of companies for increase of exports through participation to fairs and promotion missions. Experts from the private and / or public advisory service can certainly play one of the key roles in disseminating information and new knowledge about NWFP and MAP production.

Further expansion of production and processing capacities – even though that actors of sector have expanded quite rapidly production and processing capacities through private investments as well as with support of MAFRD and donor agencies, there is a need for further investments in both production and processing to both increase volumes of the products and to increase competitiveness of higher value products. Further support of MAFRD and donors would make further expansion to happen faster.

Increase quality of products – support the companies to apply quality and food safety standards through capacity building for own staff to implement the standard as well as co-financing of certification audits for standards organic, ISO 9,001 (quality), ISO 22,000 (Food Safety) and IFS or BRC to ensure good quality of exported products.

Export promotion – the sector is entirely focused on export market, ultimately, it is a need for development export promotion; export is very competitive market, therefore, work for promotion will never end. The sector needs more focus / care by institutions such as KIESA. Participation to international fairs and sales mission basically helped the development of exports of this sector, therefore, there is a need to continue.

Support ORGANIKA association – the association should be supported to build human capacities to be able to provide high quality services to existing actors of the sector as well as to new actors, companies / investors that want to enter to sector. Services that association should provide for its members are technical advice on organic cultivation of MAP and sustainable collection of NWFP, on implementation of quality and food safety standards such as standards Organic, ISO, BRC and IFS based on the demand of the export market. Association should also continue to provide services in regard to export promotion – to work with public institutions such as KIESA, MAFRD as well as with donors.



## APPENDIX 1:

### LEGISLATION AND CERTIFICATION

The existing regulatory framework for organic agriculture in Kosovo includes the Law on Organic Farming 04/L-085, based on the EU regulations 834/2007 and 889/2008, prepared by the working group established by the MAFRD and Italian specialists of KOSAGRI project and approved by Kosovo Parliament in 2012. The objective of the Law is to provide the basis for the sustainable development of organic agriculture, while ensuring the effective functioning of the market, guaranteeing fair competition, ensuring consumer confidence and protecting the consumers' interests.

The part of the national legislation on organic agriculture, especially for NWFPs, is connected with the Law on Forestry 2003/03 and the amendment 2010/03-L-153, prepared by the DF at MAFRD. The same department is also responsible for issuing licenses for the collection of wild plants.

Currently, there are two certification bodies operating in Kosovo: "Albinspekt" from Albania - accredited by the EU (operating code 139-XK Albinspekt) and "Q-check P.C" with headquarters in Larisa - Greece.

Year	Policy instrument	Responsible institution	Details
2003	Green Book Strategy for Sustainable Agricultural and Rural Development in Kosovo	MAFRD	The purpose of this Green book is to set out the policies and strategies of the MAFRD and of the Directorate of Rural Affairs (DRA) for the foreseeable future, together with their legal and organisational frameworks.
2004	Standards for Organic Agriculture	OAAK and MAFRD	Promotion of first standard for organic agriculture in Kosovo.
2004	Environmental Strategy and Sustainable Development	MESP	Strategic orientations: a) Completion of legislation regarding the land use; b) Protection and use of agricultural land for agricultural production; c) Orientation towards organic agricultural products; d) Sound management and use of fertilizers and pesticides.
2006	Kosovo-European- Partnership Action Plan	MAFRD	Set guidelines for a modern certification system for organic products.
2007-2013	Agriculture and Rural Development Plan	MAFRD	Axis 3 – Rural diversification and quality of rural life; Farm diversification and alternative activities in rural areas (Measure 6) includes among others the: Shifting from conventional to organic agriculture at farm level, processing and marketing of organic products.
2008	The former national law on organic farming No. 02/L-122	MAFRD	The consolidated version includes amendments on organic farming.
2011-2015	Kosovo Environmental Action Plan	MESP	The measures which are foreseen for the agricultural sector: Promotion and support for organic production.
2011-2020	Strategy and Action Plan on Biodiversity	MESP	To promote ecological production and organic agriculture (increase in production areas and the number of farms).
2012	Law on Organic Farming	MAFRD	The objective of this Law is to provide the basis for the sustainable development of organic production while ensuring the effective functioning of the market, guaranteeing fair competition, ensuring consumer



			confidence, and protecting consumer interests.
2016	Economic Catalogue for Agricultural Products	MAFRD	Analyzes producers' performance and compares the profitability of different cultures using different agricultural inputs
2017	Green book	MAFRD	It presents a comprehensive overview of the agricultural sector and serves as a guideline for the sector development strategy and policy
2018 / 2021	National Action Plan for the Organic Sector of the Republic of Kosovo	MAFRD	It presents a strategy for creating favorable conditions for the development of organic agriculture in Kosovo and identifies the actors responsible for the implementation of sector policies

## APPENDIX 2:

### QUESTIONNAIRE FOR BASIC ANALYSIS OF NWFP AND MAP SECTORS

#### Questionnaire for basic analysis of NWFP and MAP sectors

##### 1. General information

Company \_\_\_\_\_  
 Address: \_\_\_\_\_  
 E-mail: \_\_\_\_\_  
 Contact person: \_\_\_\_\_  
 Telephone: \_\_\_\_\_  
 Website: \_\_\_\_\_  
 Year of foundation of the company \_\_\_\_\_  
 Legal status \_\_\_\_\_

##### 2. Number of employees

Total number of employees

Full time	Women	Men	Youngsters 18-30	Minorities
Number				
Seasonal	Women	Men	Youngsters 18-30	Minorities
Number				
The specific number of workers working with raspberries				
Full time	Women	Men	Youngsters 18-30	Minorities
Number				
Seasonal	Women	Men	Youngsters 18-30	Minorities
Number				
The specific number of repatriated employees				
Full time	Women	Men	Youngsters 18-30	Minorities
Number				
Seasonal	Women	Men	Youngsters 18-30	Minorities
Number				

3. The international standards with which your company is certified				
	Certification year	Validity of the certificate up to / month / year		
Organic				
HAACP				
ISO 22.000				
IFS				
...				
...				

4. Current processing capacity				
How many % of the processing capacity you currently use? _____				
Surface area of the drier m2 _____ or Capacity in tons _____				
Shock Tunnel (-40) _____	Surface	(m2)	Capacity	(ton)
Stores for freezing ( -20) (ton)_____	Surface	(m2)	Capacity	(ton)
Store (ton)_____	Surface	(m2)	Capacity	(ton)
Other processing capacities				
Describe the machines				
Capacity (Tons)				
...				

5. Current collection and production capacities				
a) a) For the NWFP Collection in 2017 (For processors, information on NWFPs)				
	Types of NWFPs	Quantity (kg)		
1				
2				
3				
4				
5				
6				
	B) Cultivation of MAPs and berries in 2017			
(information on types and cultivators of MAP and berries)				

	Types of MAPs and berries	Surface (Ha)	Number of cultivation farmers	Surface owned by the enterprise	Organic kg	Conventional kg
1						
2						
3						
4						
5						

## 6. Contracts with NWFP wild plants collection

### Supply contract

Number of contracts with CC		Quantity (ton)	
Number of contracts with farmers		Quantity (ton)	
Number of farmers without contracts		Quantity (ton)	

### Contract with the market

Number of contracts with buyers		Countries:
Quantity contracted (ton)		

## Contracts with cultivators of medical plants, aromatic plants, tea and berries

### Contract with farmers

Number of contracts	Total contracted surface Ha	Quantity (ton)	Organic	Conventional
Number of farmers without contracts	Surface in Ha	Quantity (ton)		

Do you need to increase the number of cultivators for these plant species Yes \_\_\_ No \_\_\_

If so please specify the cultures and surfaces you want to expand				
Products	Surface (Ha)	Quantity (ton)	Organic	Conventional


### 7. Total investment amount (Please write an approximate amount of investment in euro)

### 8. Amount of investment 2016/2018

( Please write an approximate amount of investment in euro )

Machinery	Business objects (warehouse, processing space)	Capacity building of staff members	Cooling and freezing space	Other investments (specify in what)
	€	€	€	€

### Planned investments for the next two years 2018/2020

Machinery	Business objects (warehouse, processing space)	Capacity building of staff members	Cooling and freezing space	Other investments (specify in what)
	€	€	€	€

### 9. Market (2017)

	Export in total	EU	Outside EU	Regional market	Local market
Organic products	%	%	%	%	%
Conventional products	%	%	%	%	%

### Forms of sales of your enterprise products in %

Raw material (%)	Semi-processed products (%)	Final products (%)

### Your prospects for the future about the form of selling products in %

Raw material (%)	Semi-processed products (%)	Final products (%)

Total amount from export €

€

### Types of products and quantity exported

Products:	Quantity in 2017 (ton)	Country	..... (ton)	..... ( EUR )	
<u>Blueberry</u>					



<u>Mushrooms</u>					
<u>Cowslips</u>					
<u>Juniper</u>					
<u>Elderberry</u>					
<u>Raspberry</u>					

#### 10. Expanding capacities and potentials for the next five years?

Do you expect growth in export value and quantity over the next five years?

Yes

No

If so, please provide additional information on how do you plan to achieve these increases?

Increase in production quantities					
Development of new products					
Penetration in New Markets					
Processing and value increase of products - production of final products for the market					

#### 11. Your Expectations for Exports over the next 5 years

	Compared to 2017, as a result of increased demand and / or competitiveness, over the next 5 years, how much you expect to increase your export volume (tons)
	%
1. Increase	
2. Decrease	
3. I Do not expect change (neither increase nor decrease)	

Specify your anticipations in% for the next 5 years your enterprise plans to focus (based on market requirements)
Organic products %
Conventional products %

This increase in export is expected as a result of (choose all applicable options):

1. Increased demand for products in international markets
2. Better access to export markets
3. Productivity growth (eg through cultivation / production methods or advanced machinery / equipment)
4. Improvement of the quality of products
5. Improvement of product quality certification
6. Other (specify)\_\_\_\_\_

## APPENDIX 3:

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### REFERENCES

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