

# KOSOVO

## Report on the Status of Organic Agriculture and Industry in Kosovo

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Gefördert durch



Bundesministerium  
für Ernährung  
und Landwirtschaft

BÖLN

Bundesprogramm Ökologischer Landbau  
und andere Formen nachhaltiger  
Landwirtschaft

aufgrund eines Beschlusses des  
Deutschen Bundestages

# Imprint

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## Disclaimer

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

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# Kosovo: Figures, Data and Facts

## Map

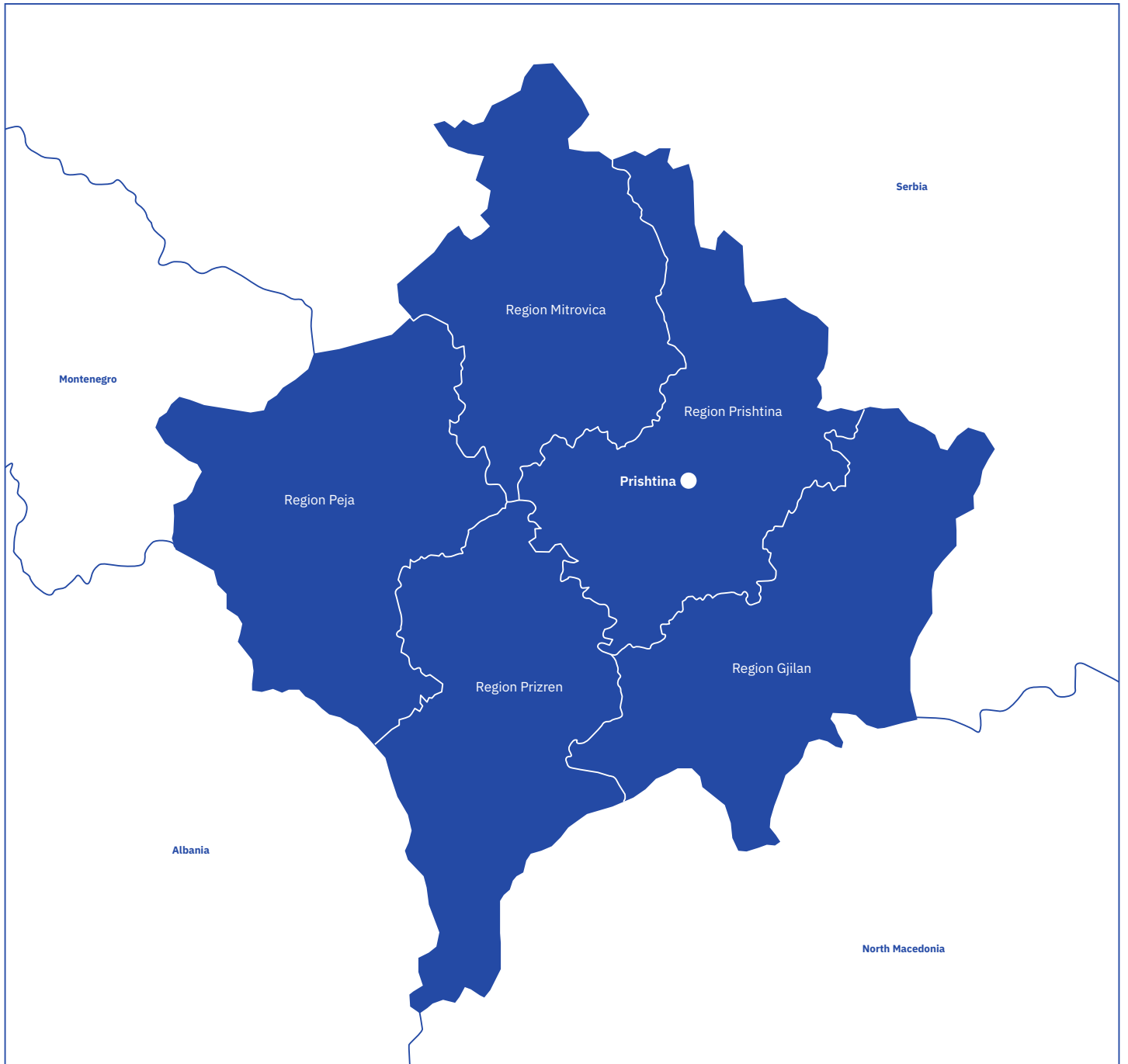


Figure 1: Map of Kosovo

Kosovo is a landlocked country situated in the South-East of Europe in the heart of the Balkan Peninsula. It is bordered by North Macedonia to the South, Albania to the West, Montenegro to the North-West and Serbia to the

North and East. The borders are characterized by sharp mountains and narrow valleys. The Sharr Mountains lie along the border with North Macedonia while Kopaonik Mountains along the northeastern border with Serbia.

# Country Statistics<sup>1</sup>

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**10,905.25** km<sup>2</sup>

Surface area

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**1.79** Mio.

Population

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**164.90** inhabitants / km

Population density

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**30.2** years

Population average age (2011)

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**61.7** %

Population living in rural areas

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**4.98** inhabitants

Estimated average household size

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**Euro** €

Currency

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**6,772** Mio. Euro

Gross Domestic Product (GDP) at current prices

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**3,772** €

GDP per capita

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**25.9** %

Unemployment rate

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# Key Agricultural Statistics<sup>2</sup>

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**498.5** Mio. Euro

Agriculture, hunting, forestry and fishing – Gross Value Added at current prices (GVA)

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**7.4** %

Contribution of agriculture in GDP

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**78.1** Mio. Euro

Agricultural exports

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**16.4** %

Share of agricultural exports in total exports

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**765.4** Mio. Euro

Agricultural imports

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**23.2** %

Share of agricultural imports in total imports

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**-687.3** Mio. Euro

Trade balance for agricultural products

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1 See Kosovo Agency of Statistics, 2021.

2 See Ministry of Agriculture Forestry and Rural Development, 2021.



# Climate and Soil

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Kosovo lies between N43°16´; S41°53´; E21°16´; W19°59´ and is divided in two main plains, the Dukagjini plain in the west and the Kosovo plain in the east. The lowest point of altitude is 265 m above the sea level located at “Drini i Bardhë” at the border to Albania and raises up to 2,656 above the sea level which is located in the southern part of Kosovo called Gjeravica. In total, approximately 80 % of the entire area lies below 1,000 m. The Kosovo plain embraces the Iber Valley which is influenced by continental air masses. Therefore, winters in the Kosovo plain are much colder when compared to the Dukagjini plain, which is influenced by air masses which cross the Adriatic Sea, and the temperatures during the winter seasons vary between -10 °C down to -26 °C. The summers are usually very hot and the temperatures vary from 20 °C up to 37 °C. The climate in the Kosovo plain is moderately dry with an

average annual precipitation of 600 mm per year. In the Dukagjini plain, winters are milder and the monthly mean temperatures vary in the range of 0.5 °C up to 22.8 °C. The average annual precipitation of the Dukagjini plain is about 700 mm per year (Kosovo Agency of Statistics, 2021).

According to a digital map on soil types (scale 1:50000) produced by the Chair of Soil Science of the University of Prishtina Hasan Prishtina and referring to the WRB-soil classification 64 (IUSS Working Group WRB 2006), more than 80 % of the agricultural used area are cambisols, vertisols, fluvisols, and regosols type (Elezi, Halimi & Zogaj, 2004a). It is estimated that 15 % of the Kosovo's soil is of high quality, 29 % is medium and mainly distributed in the Kosovo plain and 56 % is of poor quality mostly found on hills and mountainous areas (MAFRD, 2013).

# Flora and Fauna

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Much of plant and animal diversity is found in the higher mountains in the southern and western regions of Kosovo. Considering its relatively small area, the country is considered to be rich in plant and tree species. According to the Biodiversity Assessment report, 13 plant species grow only in Kosovo and about 200 species have been identified that grow only in Balkans. Favorable conditions in mountain areas provide suitable habitats for a

number of large mammalian species e.g. brown bears, lynx, wild cats, wolves, foxes, wild goat, roebuck, and deer. Whereas, ecosystems in rivers have been constantly endangered due to uncontrolled sand and gravel mining in riverbeds, including the pollution coming from the domestic and industrial sources (United State Agency for International Development, 2003).

# Trade Regime

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The general Kosovo trade regime is liberal and export-oriented. Kosovo apply 0 % VAT on final exported products and no VAT on imported inputs. The trade policy strategy of Kosovo is to support competitiveness of Kosovo's economy; however the increase of trade imbalance in the last decade will be hardly sustained for a long period of time. In 2007, Kosovo became a member of Central European Free Trade Agreement (CEFTA). The aim of CEFTA is to remove barriers for trade reciprocity among member states, which conceivably was supposed to create encouraging conditions for trade diversification and development, strengthening economic cooperation

and relations for mutual benefit, contributing to the process of EU integration by developing trade relation with EU member states as well as integrating multilateral trade system (GAP, 2011). Besides the agreement, Kosovo companies cannot yet export to Serbia and Bosnia as Kosovo is not recognized as an independent country by these two members of CEFTA agreement. Stipulated by the EU Autonomous Trade Preference (ATP) Regime Kosovo enjoys non-reciprocal, customs-free access to the EU market. However, for some food products like wine and beef, numerous restrictions remain in force (UNMIK, 2004).

# The Organic Sector in Kosovo

Kosovo has suitable climate and soil conditions for organic production. In addition, the structure, intensity and production system applied by many farmers does not require substantial changes towards conversion into organic farming. Wild collection of NWFP and MAPs dominates organic sector, while organic production of other crops is still in emerging stage. Most of NWFP and MAPS are exported as raw material. Processing is still very limited and the market needs to be further developed.

## National Organic Legislation

In October 2012, the Assembly of Republic of Kosovo based on Article 65 (1) of the Constitution of the Republic of Kosovo, approved Law No. 04 / L-085 on Organic Farming (Assembly of Republic of Kosovo, 2012). The aim of this Law is to provide foundation for organic production, while safeguarding the effective functioning of the organic market, ensuring fair competition, establish consumer confidence and protecting consumer interests (Assembly of Republic of Kosovo, 2012). This Law provides articles on general provisions, objectives and principles of organic production, third production rules, labeling issues, control system and responsible control authority, import rules, punitive provisions – sanctions for minor offence who fail to comply with this Law and who uses products and substances not authorized in organic farming, provision of data and statistical information related to Control Authority, Control Bodies and operators, including National Program for Organic Farming. In order to effectively implement the Law on Organic Farming, in 2019 the MAFRD adopted eight Administrative Instructions that cover issues related to responsibilities and composition of the commission for organic agriculture, control system including control authority, bodies and rules for the implementation in

organic production (plants, livestock, animal feed, aquaculture, processed), criteria, standards and conditions for import of organic products, logo and specific labeling. The Action Plan for Organic Agriculture was a national policy with the timeframe of 2018–2021 which aims to increase production, consumption and market share of organic products in Kosovo. The MAFRD, supported by other stakeholders, has been drafting the National Organic Action Plan (NOAP) for the time period 2022–24. The upcoming NOAP foresees Kosovo's contribution of organic agriculture to the European Green Deal towards 2030.

## Associations and Organizations

The **ORGANIKA** is the only association that support its members in becoming certified with organic standards. It has been established in 2013 and currently has 32 members and 28 organic certified companies. The organic certified companies are primarily dealing with the collection of Non-Wood Forest Products (NWFPs) and collection / cultivation of Medicinal and Aromatic Plants (MAPs). The aim of the ORGANIKA association is “The development of NWFP and MAP sector through the su-



stainable collection of NWFPs and cultivation of MAPs, as well as increasing production and processing capacities, as well as export capabilities”<sup>3</sup>. In the recent years the association has been supported by several donors and development projects. The USAID AGRO program supported the association in becoming a self-sustainable entity. Moreover, the USAID assistance supported the establishment of the office for ORGANIKA including partial compensation of staff as well as endowing attendance of various international fairs and sales. The USAID project aim was “to support the agricultural development program and opportunities in rural Kosovo, especially the Value Chain of Soft Fruit (including: strawberry, raspberry and cranberry) and Medicinal and Aromatic Plant Value Chain (including NWFPs and those grown in organic conditions and having a viable market and export)” (MAFRD, 2020). The **GIZ project Creating Employment through Export Promotion** supported ORGANIKA activities in regard to stakeholder trainings on cultivation of the organic MAPs and printing training materials about MAPs cultivation in Kosovo. The project **Promoting Private Sector Employment**, which was financed by the **Swiss Contact** in Kosovo, supported the organic certification of its members. During the period 2017 and 2018, due to this support 42 ORGANIKA members were certified organically.

**Initiative for Agricultural Development of Kosovo (IADK)** through its projects has supported students, recent graduates and farmers with trainings, internships and grants to further contribute to the development of the MAPs sector in Kosovo. Students and recent graduates were trained, and their education and skills aimed matching the requirements of relevant companies in the MAPs sector. Whereas, farmers have been trained and advised on the cultivation of MAPs and supported with grants in goods such as: seedlings, irrigation system, natural dryers accompanied with other equipment.

In 2009 the Kosovo private forest owners established a **National Association Private Forest Owners (NAPFO)** with the mandate to represent the interest of private forest owners related to the property issues, forestry reforms and inclusion of private forests in rural development, forest policies and strategies, provide information on the sector development, increase awareness on protection and preservation of natural resources and capacity building via training and knowledge transfer<sup>4</sup>. The NAPFO consists of 22 Associations of Private Forest Owners (APFOs) with approximately 4,700 members. However, there is no evidence that certain progress has been made with regard to the activities that supports NWFP. It should be emphasized that within the APFOs, 8 Women Sections (WS) have been established

out of which 7 producer groups are involved mainly in berries and MAPs. The women producer groups are becoming significant promoters of the sector by contributing in the entire value chain of the NWFP and MAPs.

## Organic Certification

In the absence of the local control body, the certification of organic products in Kosovo is done by four international certification bodies (MAFRD, 2020):

- **Albinspekt**,
- **Q-Check P.C.**,
- **Organskakontrola.ba** and
- **Bio-inspecta.ch**

Albinspekt is the only Albanian certification/inspection body accredited and listed by the European Commission to provide certification service according to the European Organic Regulation. Albinspect is also recognized by the State Commission on Organic Products at the Ministry of Agriculture, Food and Consumer Protection for providing certification under Law 106 / 2016. Q-Check is also an independent Accredited Certification and Inspection Body based in Greece and provides accredited Organic Farming inspections according to EC Council and Commission Regulations (EC)834 / 2007 and (EC)889 / 200. The EU certification standards apply as well to two other inspection / certification bodies Bio-inspecta.ch

## Info

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### ORGANIKA

[www.organika-ks.org/en/home/](http://www.organika-ks.org/en/home/)

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### Initiative for Agricultural Development of Kosovo (IADK)

[www.iadk.org](http://www.iadk.org)

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3 ORGANIKA, 2022.

4 National Association Private Forest Owners (NAPFO), <https://www.landcoalition.org/en/explore/our-network/association-of-private-forest-owners-of-kosovo-pyjet-e-kosoves/>

and Organskakontrola.ba. The MAFRD is the responsible authority to ensure control system, control authority and the control bodies for the certified organic agricultural products and foods, supported by the international partners e.g. USAID, GIZ.

## Education and Trainings

The Faculty of Agriculture and Veterinary of the University of Prishtina is the country's higher education institution and research in the field of agriculture. Teaching in organic agriculture is implemented through various courses included in the curriculum of the study programs, e.g. BSc in Plant Production, MSc in Plant Protection and MSc in Pomology and Viticulture. There is no study program offered by any public or private university in the country, which is specifically designed for organic agriculture / farming. Trainings and advisory services in organic agriculture are mainly offered by MAFRD, ORGANIKA, IADK, and CNVP.

## Research

There is very limited research with respect to organic production. A recent research has been conducted on consumer behavior towards organic food products in Kosovo. A study conducted by Miftari et al., (2022) revealed that the health concerns, certification, and environmental concerns significantly influence consumers' attitudes towards organic food products. While in developed countries, environmental concern is a major driver of the demand for organic products, in the case of Kosovo that still faces serious food safety problems, health concern is a major factor associated with preference for organic food. Using the Food Related Lifestyle (FRL) instrument, a study conducted by Imami et al., (2021) showed that the younger and more educated consumer groups care more about food content and origin, and have higher environmental concerns as well as have a higher preference for organic food. Growing awareness about food safety and quality combined with environmental concerns is expected to shift consumer preferences towards organic foods, which are perceived to be healthier and safer. This year an association called PePeKo has started to implement a pilot research project on organic pepper cultivation (variety Kurtovska Kapija) which is specially used for making Ajvar. The project is taking place in the municipality of Suhareka and Peja, spread over an area of 1 ha.

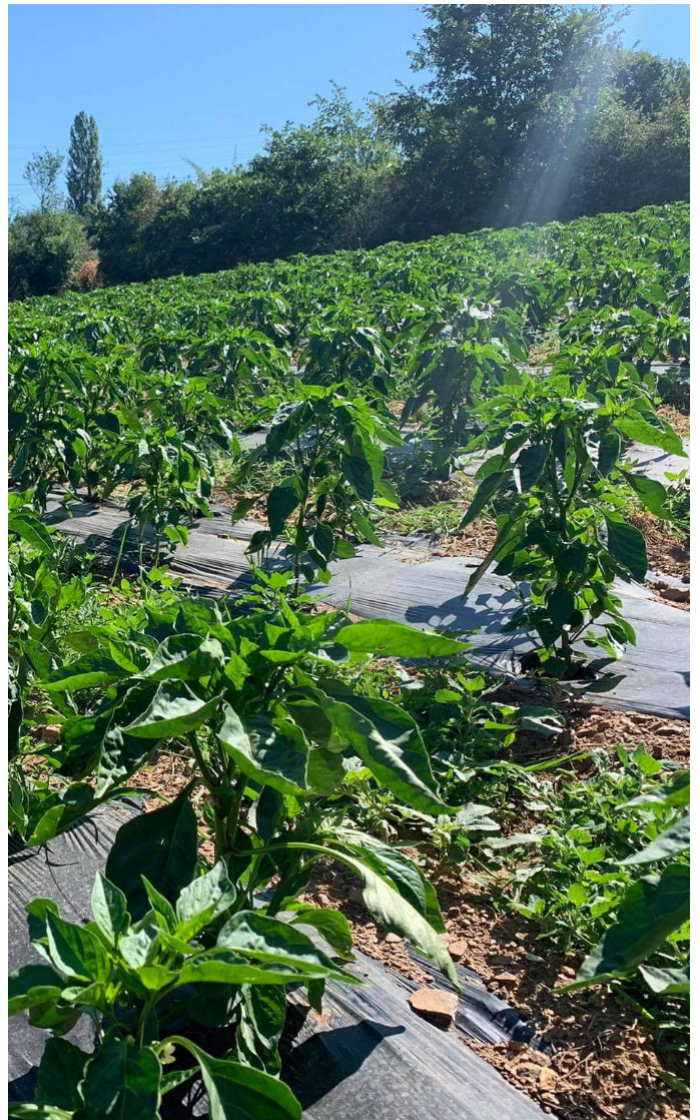


Figure 2: Field of cultivated organic pepper

## Donors, bi- and multilateral Programs

In the last three years, MAFRD-Paying Agency had a joint agreement with the United States Agency for International Development (USAID), who has been given the right to manage the project fund for **Agriculture Growth and Rural Opportunities**. The total budget of the project was US\$ 3.6 Mio, with the aim to increase the cultivated areas, improve infrastructure, provide technical assistance and enhance organic production. About 2.5 million US\$ was given in support of raspberry, strawberry, and blueberry producers in the form of grants for establishing common cooperation between farmers, processors and exporters. The amount of support varied from US\$ 50,000 to 150,000, with the support share of 50%. The amount of support for MAPs was US\$ 500,000 with the support share of 70%.

SWISS Contact through the project **Promoting Private Sector Employment (PPSE)** has been supporting companies involved in NWFP e.g. **Fungi LCC** and **99 Lule**. In addition, the PPSE through the program **Facilitation of Certification Programs** has supported the process of certification of 30 collection centers. The support was given for certification costs based on the frequency of certification, if the SME was certified for the first time the co-financing was 50 %, the second time 25 % and the third time 15 %.

Swedish International Development Agency (SIDA) through the project **Strengthening Sustainable Private and Decentralised Forestry in Kosovo** has provided technical assistance and training courses to beneficiaries. The project was focused on the: i) sustainable private forest management; ii) sustainable decentralized forest management; and iii) wood biomass production for renewable energy and NWFP. In addition, the project had support packages for seedlings and equipment needed in collection, cultivating and processing of NWFP.

Another project named **COSiRA Competitiveness of the Private Sector in Rural Areas** financed by GIZ, supported companies involved in NWFP in regard to challenges faced in managing natural resources like monitoring collection of NWFP, complying with national and international standards related to environment protection and fair trade standards, integration into international value chains of NWFP and MAPs, and attracting investments in upgrading the value chain of NWFP and MAPs.

In 2020, IADK supported 54 farmers with equipment and machinery needed in cultivating MAPs, the total supported areas was 13.5 ha. MAPs growers have been supported by IADK in the past years as well, mainly in the form of seedlings, drying greenhouses, cultivation, greenhouses, thermal greenhouses, moto-cultivator and fruit cutter.

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## Info

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### Promoting Private Sector Employment (PPSE)

[www.swisscontact.org](http://www.swisscontact.org)

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### Fungo LLC

[www.fungo-shpk.com](http://www.fungo-shpk.com)

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### 99 Lule

[www.99lule.com](http://www.99lule.com)

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# Organic Production and Processing

The majority of organic certified products in Kosovo are Non-Wood-Forest-Products (NWFP). Export consists of semi-processed goods or raw material. Only 9 % is exported as final processed and packaged product ready for the end-consumer. Adding value in country requires great investments, but it also creates employment opportunity and livelihood for people living in rural areas.

## Non-Wood Forest Products

The Kosovo's total forest area is 481,000 ha, out of which 278,880 ha belongs to the public forest land and 180,920 ha is private forest land (MAFRD, 2020, p. 95 ff). The Non-Wood Forest Products (NWFP) and Medicinal and Aromatic Plants (MAPs) are important products growing both, wild and cultivated. The territorial area is small, but the climatic conditions and the depth of the active soil strata makes the country rich in terms of quality and quantity.

The collection area of NWFP and MAPs consists of eight zones, where two of the collection zones belong to the **National Parks Sharri** and **Bjeshket e Nemuna** which are managed by the National Park Directorates and six other zones (Mitrovica, Gjiilan, Prizren, Prishtine, Peje, Ferizaj), managed by the Kosovo Forest Agency (MAFRD, 2009).

More than 300 species of NWFP and MAPs are collected and a considerable number of species are cultivated (Organika, 2020). At least 67 species have a

commercial value and contribute to the income generation and economic well-being of families living in rural areas.

**Distribution of the collection area among seven zones (2009 | ha)**

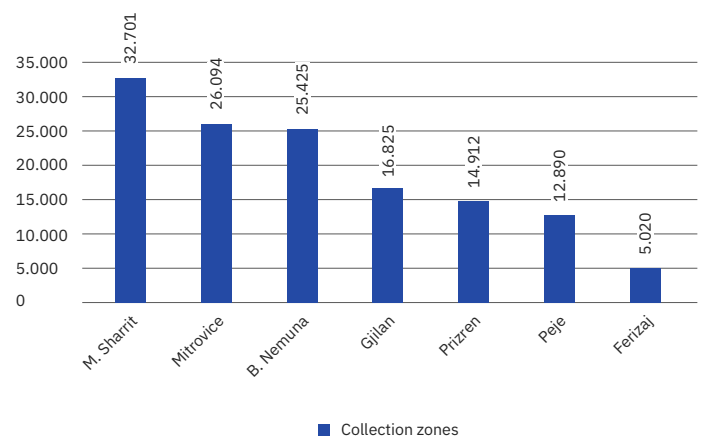


Figure 3



## Organic Production and Processing

Achillea Millefolium – Yarrow	Aconitum napellus – Monkshood	Alchemilla vulgaris – Lady's mantle	Allium ursinum – Wild garlic
Althaea officinalis – Marsh mallow	Arctium lappa – Greater burdock	Arctostaphylos uvaursi – Bearberry leaf	Artemisia absinthium – Wormwood
Artemisia-annua – Sweet wormwood	Artemisia vulgaris – Common mugwort	Arum maculatum – Cuckoopint	Bellis perennis – Common daisy
Betulapendula – Silver birch	Boletus edulis – Porcini (edible mushroom)	Cantharellus cibarius – Mushroom chanterelle	Capsella bursa-pastoris – Shepherd's purse
Carlina acaulis – Silver thistle	Castanea sativa – Sweet chestnut	Centaurea cyanus – Cornflower	Centaurium umbellatum – Common centaury
Cichorium intybus – Common chicory	Crataegus monogyna – Common hawthorn	Dryopteris filix-mas – Fern	Equisetum arvense – Horsetail
Fragaria vesca – Wild strawberry	Hedera helix – Common ivy	Hypericum perforatum – St. John's wort	Iris germanica – German iris
Juniperus communis – Common juniper	Malus sylvestris – European crab apple	Malva sylvestris – Common mallow	Matricaria chamomilla – Chamomile
Melilotus officinalis – Yellow melilot	Melissa officinalis – Lemon balm	Mentha piperita – Peppermint	Morchella conica – Black morels
Ononis spinosa – Spiny restharrow	Origanum vulgare – Oregano	Papaver somniferum – Opium poppy	Plantago lanceolata – Ribwort plantain
Plantago major – Broadleaf plantain	Primula veris – Cowslip	Prunus spinosa – Blackthorn	Pyrus sp – Wild pear
Rosa sp. – Rose	Rubus fruticosus – Blackberry	Rubus idaeus – Red raspberry	Salix alba – White willow
Salvia officinalis – Common sage	Sambucus ebulus – Danewort	Sambucus nigra – Elderberry	Satureja Montana – Winter savory
Sideritis scardiac – Greek mountain tea	Sorbus aucuparia – Rowan	Taraxacum officinale – Dandelion	Teucrium montanum – Mountain germander
Thymus sp – Creeping Thyme	Tiliacordata – Small-leaved lime	Trifolium pratense – Red clover	Tussilago farfara – Coltsfoot
Urtica dioica – Common nettle	Vaccinium myrtillus – Blueberry	Valeriana officinalis – Valerian	Verbascum-Thapsus – Great mullein
Verbena officinalis – Common verbena	Viola odorata – Sweet violet	Viola tricolor – Wild pansy	–

Figure 4: List of species of NWFP and MAPs

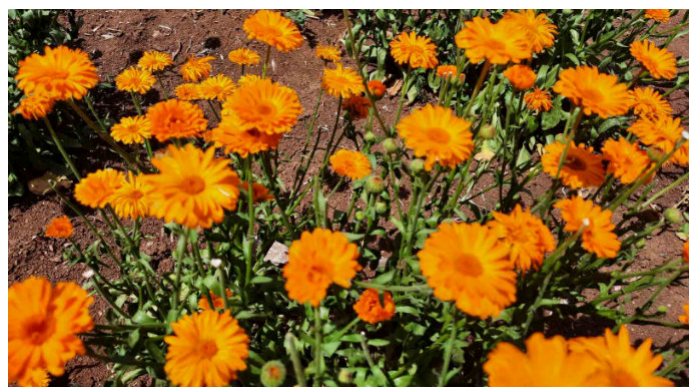


Figure 5: Cultivation of Calendula by farmers



Figure 6: Cultivation of Cyan flower

From the economic perspective and export potentials, the main NWFP and MAPs in Kosovo are *Vaccinium myrtillus* (Blueberries), *Juniperus communis* (Juniper), *Primula veris* (Primrose), *Sambucus nigra* (Elder), *Mallus sylvestris* (Wild apples), *Crataegus monagina* (Hawthorn), *Castanea sativa* (Chestnuts), *Achillea millefolium* (Barpezmi), *Urtica dioica* (Nettles), *Thymus sp* (Listra.), *Rosa canina* (Wild Rose), *Betulla pendula*, *Origanum vulgare*, *Robinia pseudocacia*.<sup>5</sup>

In the development of this sub-sector numerous stakeholders are involved including pickers of the wild and cultivated plants, collectors / processors, processors / exporters, associations, MAFRD, Kosovo Forest Agency, Ministry of Environment and Spatial Planning, Agency of Environmental Protection, Communes, educational system related to forest, donors and financial institutions.

## Pickers and Producers / Farmers

Pickers and producers of the NWFP and MAPs are usually people living in mountain or rural areas and having as prime activity collection or cultivation of the NWFP and MAPs in the surrounding area. Pickers are the ones who do the primary deep selection of the collected products, then sell them to the collectors/processors or sometimes directly to the market. The country is assessed to have around 20,000 pickers, mainly women and children and often the family as whole, whose earnings vary between 12–15 Euros per day. Farmers who do cultivate NWFP and MAPs are those mainly responding to the needs of the collectors with regard to the species, amount and time.

### Total cultivated area with MAPs

(2017–2019 | ha)

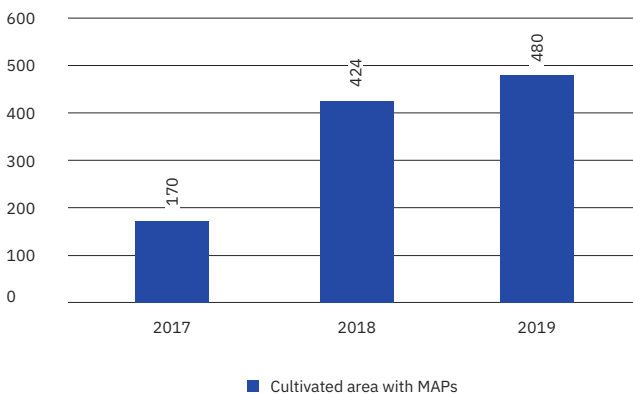


Figure 7



Figure 8: A farmer Mrs. Zarije Malsiu picking Calendula flowers

## Collectors / Processors

The main role of collectors and processors of wild and cultivated NWFP and MAPs is to connect pickers and exporters in the value chain. They are well informed about the demand and supply of these products and serve as regulators between pickers and exporters through offering information on prices, volume, quality, processing and exporting requirements. In most of the cases they do not have a processing line; therefore, they tend to sell their products to processors / exporters. It has been estimated that the overall number of collectors / processors operating in the sector of NWFP and MAPs is app. 100.<sup>6</sup>

5 Assessment report for Non-wood forest products and medicinal and aromatic plant sector 2019. Association Organika, see <https://organika-ks.org/en/publications/>

6 Data from GIZ / Cosira Project: “Definition of collection areas and quotas for Non wood forest products in Kosovo”.



## Processors / Exporters

About 41 processors / exporters operate in the country, which have processing and packaging lines that fulfill the demand of international market in terms of quality and safety standards (see Association ORGANIKA). Out of 41 processors / exporters involved in the sector, 35 are classified as micro-enterprises with less than 10 employees, 5 belong to the small enterprises with 10–49 employees and 1 is medium scale enterprise with 50–249 employees (see *ibid.*). Since 2013, the processors / exporters of the NWFP and MAPs have established an Association named ‘ORGANICA’ the aim of which is to strengthen the cooperation between value chain actors of the NWFP and MAPs and conduct lobbying activities related to sector promotion in the international market.

### Distribution of the total production/processing by NWFP and MAPs and enterprise size (2020)

Size of the enterprise	No. of enterprises	Total production / processing in tons	Processing of NWFP in tons	Production / processing of MAPs tons
Medium 50–249 employees	1	1316.35	1182.05	134.3
Small 10–49 employees	5	3342.65	3240.4	102.25
Micro less than 10 employees	35	3596.82	3053.8	543.02
Total	41	8255.82	7476.25	779.57

Figure 9

**Agroproduct LCC** is the only medium sized enterprise leading the export of NWFP and MAPs. The top two processed and exported products of this enterprise were Juniper (*Juniperus Communis*) and wild apple (*Mallus Sylvestris*). The enterprise supported by the grant schemes and donor contribution has invested in a storage facility, greenhouse for seedling cultivation, drying areas, cooling rooms, new facilities for processing lines and mechanization for cultivation of land. The cooperation between Agroproduct and around 60 collectors/processors and 3,000 pickers all over the country is settled with a 5 years contract. The prices vary according to the international market prices, as the company is ex-

porting almost 95 % of its production, mainly to Germany, Austria, Switzerland and Czech Republic. Organic certification for both, collected and cultivated NWFP and MAPs was obtained from the Swiss certification body BioINSPECTA from 2009–2011, and since 2012 from the Albanian organic certification body Albinspekt. It is the only large-scale producer of organic products in Kosovo.



Figure 10: Promotion at the fair of MAPs by Agroproduct

## Info

**Agroproduct LCC**

[www.agroproduct-shpk.com/en/about-us/](http://www.agroproduct-shpk.com/en/about-us/)





**Fungi LCC** is another enterprise specialised in mushroom production in the Kamenica municipality. About 95 % of its products are exported to Italy, Switzerland, Germany, Holland, Montenegro, Macedonia, Lithuania, and USA. The enterprise collects its products from 22 collection centres, where thousands of pickers are involved and engages around 100 seasonal workers, thus making a valuable contribution to the employment opportunities in the region. Its top two products are dry porcini mainly sold into Swiss supermarkets and dry Morchella Esculenta sold in the international markets with the premium price. The enterprise has diversified fungi production through processing and adding value into mushroom ajvar which is branded as **Mama MIA**.



Figure 11: Collected wild mushrooms by Fungo LCC, 2022

**Hit-Flores SHPK** collects, process and export wild and cultivated fruits, mushrooms and MAPs. The supply is mainly from the collection zone of Sharri, and employs 20 full-time workers and 50–120 seasonal workers.



Figure 12: Promotion at the fair of NWFP and MAPs by Hit Flores



Figure 13: Collection of NWFP and MAPs by Hit Flores, 2022

## Info

**Fungo LCC**

[www.fungo-shpk.com/](http://www.fungo-shpk.com/)



**Hit-Flores SHPK**

[www.hitflores.de/](http://www.hitflores.de/)





**Eurofruti** is another company collecting, processing and freezing wild fruits. The annual average of collected wild fruits varies from 1500 to 2000 tons, and approximately 100 tons of wild mushrooms. About 95 % of the total products are exported mainly to EU countries.

About 95 % of the NWFP and MAPs are sold as raw material or semi-processed. It is only one company **Peppermint International** that extracts essential oil from a variety of wild MAPs.



Figure 14: Collected wild mushrooms by Eurofruti, 2022



Figure 15: Collected wild blackberries by Eurofruti, 2022

## Market and Trends

Approximately 95 % of the total NWFP and MAPs are exported to the EU market. In 2019, the total amount of export for NWFP and MAPs was EUR 8.15 Mio (mostly as organic certified wild collection), where majority (83 %) of the export sales was from the NWFP. The total sales of NWFP and MAPs at the National market was reported 2.2 Mil. Euro. Within a relatively wide range of sold products, top five NWFP leading the country's export were: 1) wild blackberry (EUR 0.51 Mio.); 2) mushrooms (EUR 0.48 Mio.); 3) juniper (EUR 0.47 Mio.); 4) Cowslip (EUR 0.31 Mio.) and 5) wild garlic (EUR 0.27 Mio). While top five MAPs leading the exports of 2019 were: 1) Oregano (EUR 61,500); 2) Menthe (EUR 34,665); 3) Mallow (EUR 25,560); 4) Basil (EUR 20,000); and 5) Cornflower (EUR 15,750). The export sales in 2019 increased by 28 % when compared to the previous year, while the export in 2018 compared to 2017 was 10 % higher, showing a positive trend within the given time frame. When looking at the structure of the export sales, majority (51 %) was semi-processed products followed by raw material (40 %), and only small quantity (9 %) as final product. These figures show the needs and opportunities for bigger investments in the processing capacities of this industry that allows adding value to these products in Kosovo.

Organic food supply in Kosovo is very limited. There are only few shops offering only organic food products in Kosovo. In Prishtina which is the capital city of Kosovo only two shops sell organic food products 'Dyqani Bio' and 'Hambarë'. Most of the organic food products is imported from EU countries e.g., Germany, Italy and Croatia. Few processed organic food products originate from Kosovo e.g. vinegar from wild apples, blueberry juice, and aronia juice. According to the interviews with shop keepers consumers have higher preference for EU organic food products, and this relates to higher trust in EU organic certificates. The demand for organic food products is considered to be fairly low and this might be mainly due to low purchasing power and the consumers' awareness towards organic food products.

## Info

**Eurofruti**

[www.eurofruti.com/](http://www.eurofruti.com/)







Figure 16: Organic shop 'Dyqani Bio', Pristine



Figure 18: Organic food products at 'Dyqani Bio', Pristine



Figure 17: Organic domestic blueberry juice at Dyqani Bio, Pristine;  
Organic food products at 'Dyqani Bio', Pristine



Figure 19: Hambarë store in Pristine

### Gross margins and net income of some cultivated MAPs

	Nettle (EUR / ha)	White oregano (EUR / ha)	Peppermint (EUR / ha)	Chamomile (EUR / ha)	Pot Marigold EUR / 0.1 ha	Cornflower EUR / 0.1 ha	Common Mallow EUR / 0.1 ha
Total income	8.925	7.200	8.100	2.000	1.440	1.350	3.675
Total input costs	1.611	1.287	1.455	484	592	592	592
Total machinery costs	127	73	83	80	14	16	14
Total labor costs	1.034	887	992	167	382	282	1.857
The other expenses	724	710	717	782	19	16	18
Total variables costs	3.498	2.958	3.248	1.514	1.008	908	2.482
Gross margine	5.426	4.241	4.851	485	431	441	1.192
Depreciation	1.101	1.101	1.376	-	-	-	-
Net income	4.325	3.139	3.474	485	431	441	1.192
+ Subsidies	500	500	500	500	45	45	45

Figure 20

### Level of attainment of relevant national and EU standards

International and domestic markets are becoming drivers of quality improvements and the food safety standards. In this regard, the process of certification paves the way to quality of bio products and their export. Each collection centre that exports is required to be certified as organic by the international recognized certification body such as **ALBINSPECT**, operating in Kosovo.

In order to create competitive sector of NWFP and MAPs, it is important to know and comply with international standards related to the management of NWFP and MAPs such as Good Agriculture and Collection Practices (GACP) and Fair Wild standard. The Fair Wild

applies to wild plant collection, the aim of which is to ensure sustainable collection, supporting the livelihoods of collectors, social responsibility and fair-trade principles. The working group of GACP has developed a Practical Implementation Guide to GACP and Standard Operating Procedures (SOP) that can be supportive to uniformity of performance (efficiency and efficacy) and quality output, while reducing miscommunication and failure to comply with sector regulations. Of significant importance for the sector development are as well instructions and codes for fair practices in food trade, developed by the commission of FAO and WHO on Codex Alimentarius. Applicable codes of Codex Alimentarius for the MAPs might be those related to principles on hygiene, instructions on organic food production, processing, labeling and trade.

### Implemented standards by enterprises

	BioSuisse	HACCP	IFS	IP	ISO 22000	Kosher	NOP	Organic
Number of enterprises	2	2	0	1	5	1	1	28

Figure 21



Despite the investments, many of the sector's processing enterprises are lacking compliance with required standards related to food safety and environment. This is mainly due to the policies for quality standards and food safety which are at infant stage, weak law enforcement, limited institutional capacity and private investments. Hence, all these problems pose real and perceived safety risks for companies and consumers. Within the ARDP implementation framework, support was given to the investments targeting compliance with Community standards which is highly important for strengthening sector's competitiveness on the domestic and international markets. Further support is needed in upgrading physical capital of this sector, adapting production practices, develop food safety systems, keep updating with newly introduced standards, and human capacity development through enhanced capacities for their correct implementation.

Kosovo is a member of Central European Free Trade Area (CEFTA) and customs-free access to the EU market based on the Autonomous Trade Preference (ATP) Regime. There are two main instruments related to safety issues:

- Law on Sanitary Inspectorate of Kosovo No. 2003 / 22;
- Regulation No. 2003 / 39, governing the control of food quality, safety, hygienic and sanitary conditions.

Kosovo has been harmonizing its legislation for food safety and phytosanitary according to the EU standards, however much more effort needs to be made towards its membership in CODEX Alimentarius, the European Plant Protection Organization (EPPO), the Convention on Biodiversity (CBD), the Union of Protection of New Varieties of Plants (UPOV), the European Cooperative Program for Crop Genetic Resources Networks (ECP / GR), International Plant Protection Convention (IPPC), World Organization for Animal Health (OIE), Nationally Determined Contributions (NDCs), the Land Degradation Neutrality (LDN). All produced food products in Kosovo must comply with domestic law, however being a member of the WTO and other international organization will encourage the application of sanitary and phytosanitary measures based on the international standards, guidelines and recommendations. Becoming a member means that the country can play an active role in developing international standards that help to protect exported and imported products.

## Past and on-going support by the MAFRD

The support for NWFP and MAPs has been given under the measure 'sector of processing of herbs, medicinal plants, forest fruits and collected mushrooms' since 2015.

The initial projected budget for this measure was EUR 300,000, which was decreased in the following two years 2016 and 2017. In 2018 and 2019, this measure was not implemented anymore. MAPs during these last two years were supported under the measure 'sector of farm processing and trading of agricultural products on a small scale'. The number of total approved beneficiaries during 2015–2017 was 21, equally distributed in each year.

Since 2018, MAPs have been subsidized as organic agriculture product based on cultivated area e.g. 1 ha of certified organic MAPs was supported with 500 Euro / ha. The basic subsidy for non-certified producers of MAPs was 0.00 Euro / ha, which is different when compared to vegetable producers where basic subsidy was 300 Euro / ha + 500 Euro / ha if certified organic.

Direct payments were paid based on minimum eligible area (0.10 ha) planted with organic crops and for which they have the certificate for organic production. Subsidizing was provided per area/hectare, in the amount of EUR 500 / ha. The planned budget for subsidizing organic production was EUR 110,000 (MAFRD, 2020).

From the field interviews, focus group meetings and statistics on support schemes of this sector, it is clearly shown that the support of this sector was very small in relation to investment requirements and the potential for development and contribution to employment, countries economy and trade balance.

### Projected and approved budget in support of NWFP and MAPs (2015–2017 | Euro)

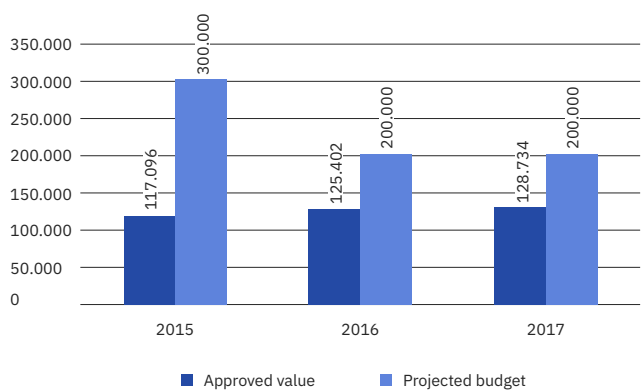


Figure 22



## SWOT Analysis

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### Strengths

- Availability of pure, clean land provide a good base for extension of cultivated areas with organic products (MAPs).
- Lower cost of cultivation makes it easier to get involved in primary production especially for women and youth in rural areas who generally are weaker economically.
- High quality of products (NWFP and MAPs).
- Good market linkages developed by processors / exporters, collectors / processors and producers / pickers.
- Significant sector contribution to the national employment (approximately 20,000 pickers, 100 collectors/processors and 41 processors / exporters) and economy (8.15 Million Euro in 2020).

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### Weaknesses

- Limited and outdated mechanisation, tractors, plows and harvesting machinery due to the budgetary constraints.
- Limited irrigation system installed.
- Limited storage facilities (dryers and freezers), weakens the quality of products, work overload and higher production costs.
- Limited information and knowledge by pickers of what represents a sustainable harvest of NWFP and MAPs.
- Limited level of attained national and EU quality and safety standards.

### Needs to increase the strengths in the sector / business

- Technical support by MAFRD to acquire approval of soil quality and soil use perspective.
- Supporting and building capacity (theoretical knowledge and practical skills) of women, young farmers and farmers in transition to organic production about assessment of soil health, weed management, irrigation and water management, insect pest management, disease management, and economics and marketing.
- Technical and financial support by MAFRD in product quality certification (e.g. Organic, Good Manufactory Practices GMP). Development of niche market for high quality products and market premium prices for certified products.
- Support in further development of clear market potential for certified products and traceability of products.
- About 90 % of the NWFP and MAPs is sold as raw and semi-processed products. More supported investments are needed in order to improve the added value to these products and decrease the differences between creating and capturing the value in the market.

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### Needs to reduce the weaknesses in the sector / business

- Financial support for investment in farm machinery is needed.
  - Financial support for irrigation.
  - More supported investments in post-harvesting infrastructure e.g. storage facilities for producers group.
  - More and better trainings for pickers on wild collection by following the standards and guidelines for sustainable harvest of NWFP and MAPs.
  - Technical and financial support by MAFRD in product quality certification (e.g. Organic, Good Manufactory Practices GMP).
-

## Opportunities

- Availability of sufficient raw material (NWFP), as only 10 % of the production capacity has been collected.
- Positive trend of the demand for NWFP and MAPs (at domestic and international market).
- Easy market access with an increase of 28 % in 2019 compared to 2018 and 10 % in 2018 compared to 2017.
- Forming farmer groups, starting with organisation and marketing; joint machinery services; e.g. jointly owned dryer or freezer.
- Processors / exporters interested in revising MAFRD support scheme for NWFP and MAPs.
- Level of experience created by primary producers, collectors / processors and processors / exporters may allow expansion of areas with domesticated NWFP and MAPs.
- Law enforcement will confine overexploitation of scarce NWFP and MAPs.
- Enhancing marketing strategy and increase domestic consumer awareness.

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## Threats

- Expensive and unreliable agro-inputs; questionable quality of sold inputs due to limited capacity for inspections.
- MAFRD's and municipalities' advisory system in poor shape; "certified" advisors failed; also the "tendered" training course failed.
- High interest rates restrict uptakes of loans for necessary investments.
- Internal and external migration from mountain areas can reduce the number of harvesters and thus causing raw material shortages for processors of NWFP and MAPs.
- Young generation not interested in agriculture, especially if not familiar with it (through advanced vocational schools); also migration in EU countries mostly attract people from rural areas.
- Weather conditions and forest fires place in risk growth and harvesting process of NWFP and MAPs.

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## Needs to valorise opportunities

- There is a need for selection and the use of appropriate biometric methods that will allow more accurate resource quantification and predictions in different regions and for different NWFP and MAPs.
- Increasing investments in the whole value chain of NWFP and MAPs.
- Awareness raising for "cooperation"; visits to successful groups.
- To increase the support threshold or introduce new sub-schemes to support the needed investments in processing of NWFP and MAPs.
- More and better trainings for pickers and primary producers on wild collection, semi-domestication and domestication of different species by following the standards and guidelines for sustainable harvest and cultivation of NWFP and MAPs.
- Coordination of regulation and legal framework for NWFP and MAPs between MAFRD and Ministry for Environment.

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## Needs to mitigate the threats

- World-market input prices to be compatible on world market.
- Restructure the advisory service within MAFRD; train and equip extensionists with cars to reach farmers (and monitor their performance strictly); government officials have to be excluded to provide remunerated services after working hours.
- Foster affordable finance schemes.
- Strengthen capacities in terms of monitoring measures towards sustainable harvest of NWFP and MAPs.

# Conclusion

The sector of NWFP and MAPs seems to be the promising organic sector in Kosovo. However, about 90 % of the NWFP and MAPs are sold as raw and semi-processed products. So far the support for NWFP and MAPs has been given under measure for diversification of income activities in rural areas. The amount of support given under this measure does not match with the amount of investments needed. Therefore, more supported investments are needed in order to improve the added value to these products and decrease the differences between creating and capturing the value in the market. Taking into account that many of Kosovo farms are small scale and subsistence with low use of artificial fertilizers and pesticides as well as with limited access to advanced modern agriculture machinery, transformation to organic farming might take less time and patience.

Having reliable domestic organic certification is crucial to improve both, real and perceived consumer

trust towards organic food products sold in the market. Compliance with EU organic standard is a must also for export-oriented companies. This would require long term engagement, both, in terms of producers and consumer education including institutional capacity building and involving cooperation between different stakeholders. The research on organic production in Kosovo is very limited, therefore support for extended research on organic production and better understanding of consumer behaviour/perception towards organic food products including policy making perspective is needed.

Strengthen and intensify cooperation and exchanges between involved institutions and stakeholders, which may imply tailored visits for producers of Kosovo to the neighboring region and other EU countries, while they can also exchange best experiences and lessons learned with colleagues involved in organic farming/processing would be a great help to those engaged in the organic sector in Kosovo.

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