

“Study on the research, innovation and technology transfer capacities and on the recent agricultural policy developments in the context of the EU approximation process in the pre-accession countries”

Interim meeting, 25th June 2020 (online)

State of the art of policy papers, statistics and APM data sampling, issues and obstacles

**Dragi Dimitrievski, Aleksandra Martinovska Stojceska,
Ana Kotevska, Ivana Janeska Stamenkovska**

*Association of Agricultural Economists of the Republic of Macedonia
University ss. Cyril and Methodius in Skopje, Faculty of Agricultural Sciences and Food - Skopje*



JOINT RESEARCH CENTRE

SWG
RD
MS

Specific sub-tasks - Analyses of agricultural policy developments in WB countries and Turkey

- ✓ **Task 1.1: Collect information** on agricultural policy developments in WB countries and Turkey – **APM database** (update by 2019 if available)
- ✓ **Task 1.2: Agricultural Statistics Database** WB countries and Turkey (update by 2019 if available)
- ✓ **Task 1.3:** Provide **country case studies** on agricultural policy developments in the WB countries
- **Task 1.4:** Provide analyses of agricultural policy developments in **Turkey**
- **Task 1.5:** Provide a **comparative cross-country analysis** of the agricultural policy developments in the WB countries and Turkey

Agricultural Statistics Database – progress information

National Experts tasks

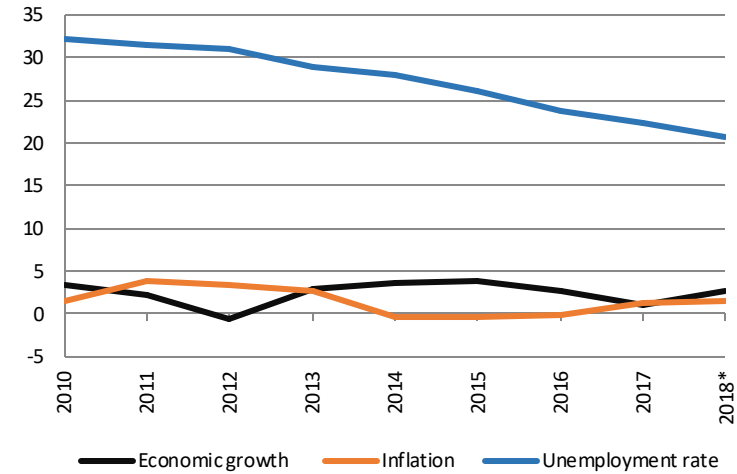
- ✓ Checking missing data for the period 2010-2017 (and updating previously preliminary with final data)
- ✓ Update the database for the period 2017-2019 (if 2019 not available, until 2018)
- ✓ Update data for new added sheets in database for organic agriculture and socio-economic and labour

Provided data per country

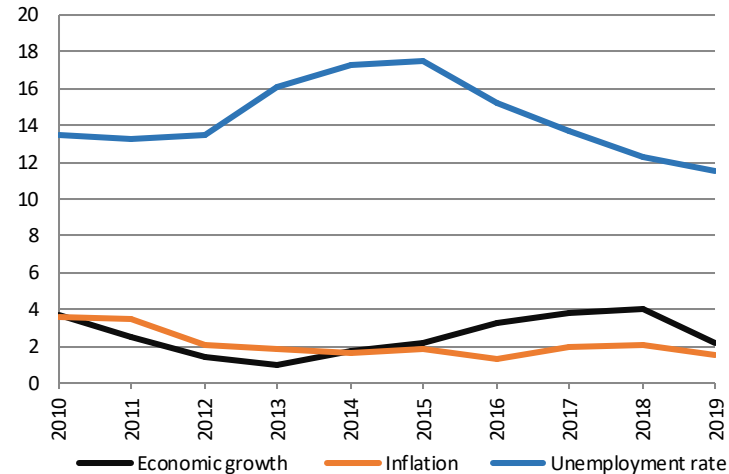
Country	Data checked	Update 2017-2019 data	Socio-economic, labour and organic production data
AL	<input checked="" type="checkbox"/>	Mostly completed; unavailable data for farm structure (FSS), farm gate prices (2013-2019); price indices; EAA	Organic production data not available; general socio-economic data partially completed due to unavailable data; general labour partially completed due to unavailable data; labour in rural areas data NA
BH	<input checked="" type="checkbox"/>	Mostly completed (some 2019 data missing); unavailable data for FSS, EAA	Organic production data not available; Employment in agriculture completed, most of other labour data not available
KS	<input checked="" type="checkbox"/>	Mostly completed (some 2019 data missing); FSS last for 2014; in trade data Turkey to be also added.	Organic production data not available; Socio-economic and labour data (instead for 2018 general labour data) not available.
MK	<input checked="" type="checkbox"/>	Mostly completed (some 2019 data missing); FSS 2019 not published yet	Organic production capacities completed, but production not available; general socio-economic data partially completed due to unavailable data for certain periods; labour data mostly completed.
MN	<input checked="" type="checkbox"/>	Mostly completed (some 2019 data missing); Farm gate prices not available; Price indices not available; EAA NA	Organic production, only total quantity and capacities are available; socio-economic data most are missing; total labour mostly completed; labour in rural areas not available
RS	<input checked="" type="checkbox"/>	Mostly completed (some 2019 data not available yet).	Organic production capacities completed, but production not available; socio-economic data partially completed due to unavailable data; labour completed; labour in rural areas not available.
TR	<input checked="" type="checkbox"/>	Mostly completed; FSS not available.	Organic production (2014-2018) completed; General socio-economic data partially completed due to unavailable data; general labour completed; labour in rural areas unavailable data 2014-2019

Macroeconomic situation

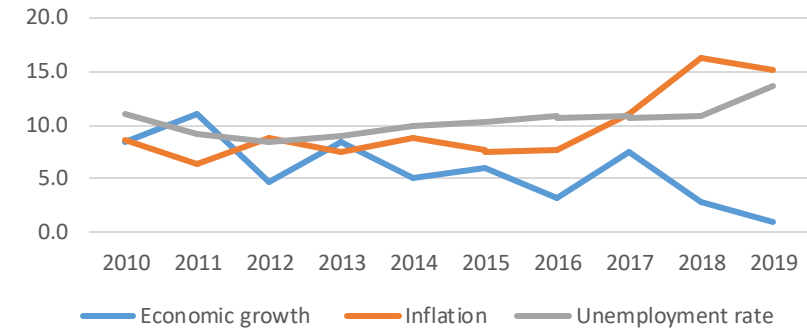
MK



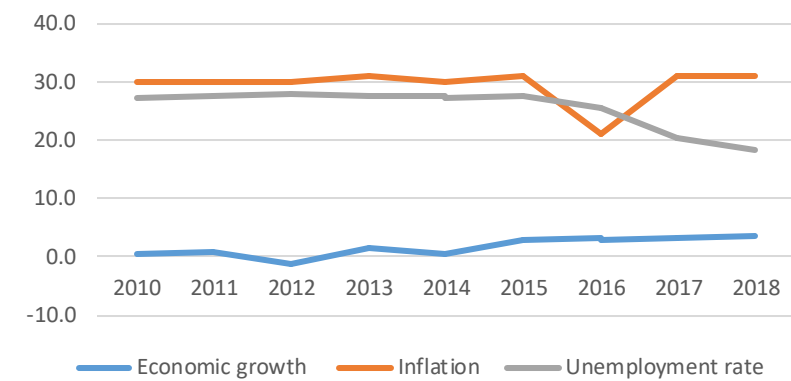
AL



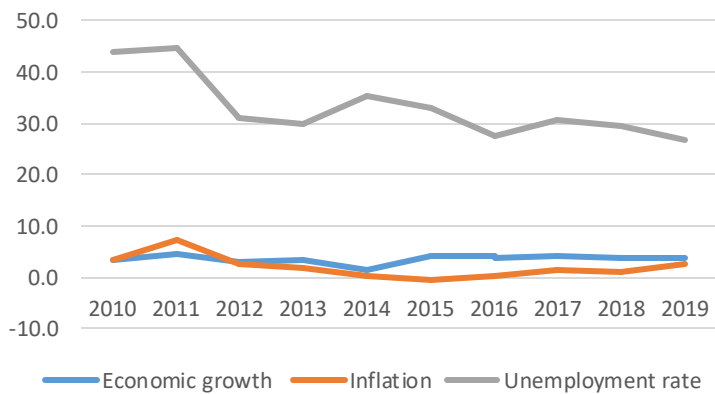
TR



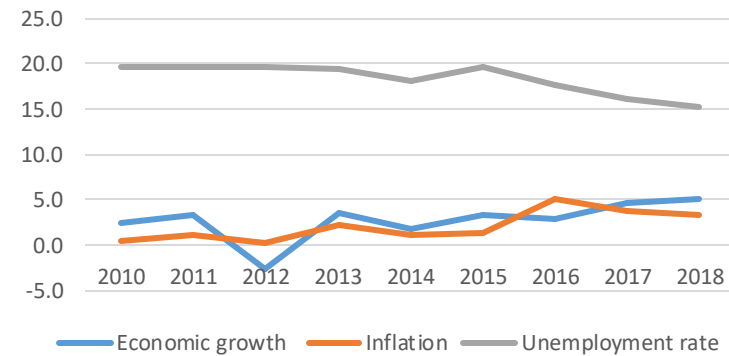
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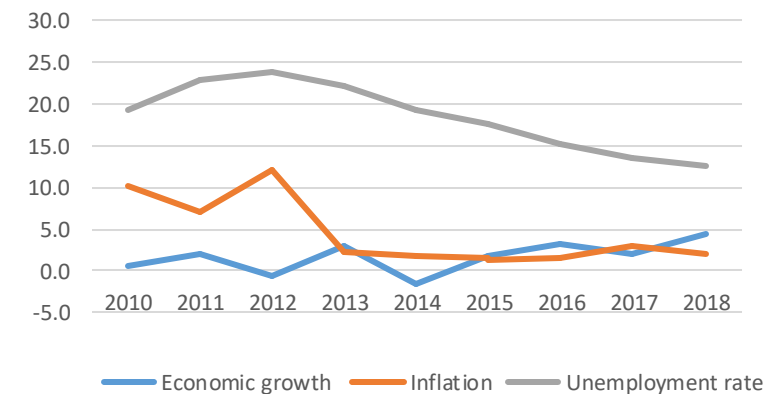
KS



MN



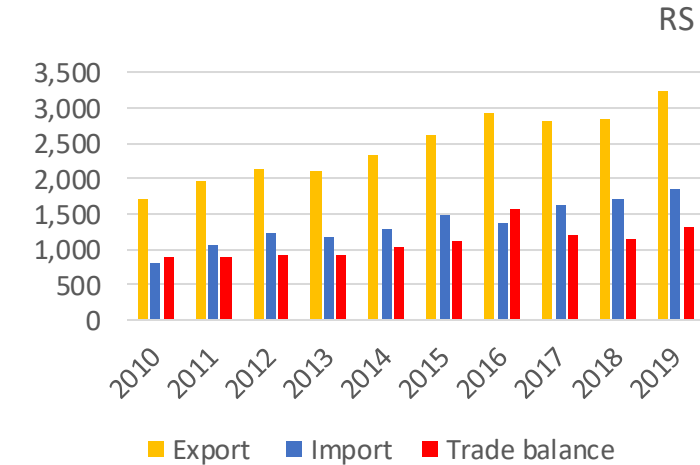
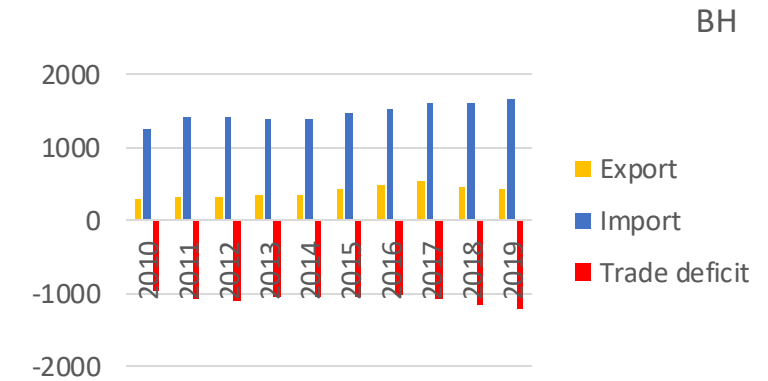
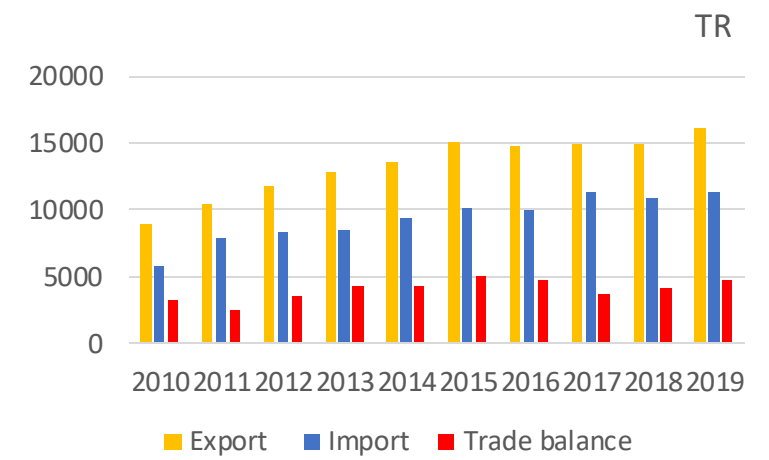
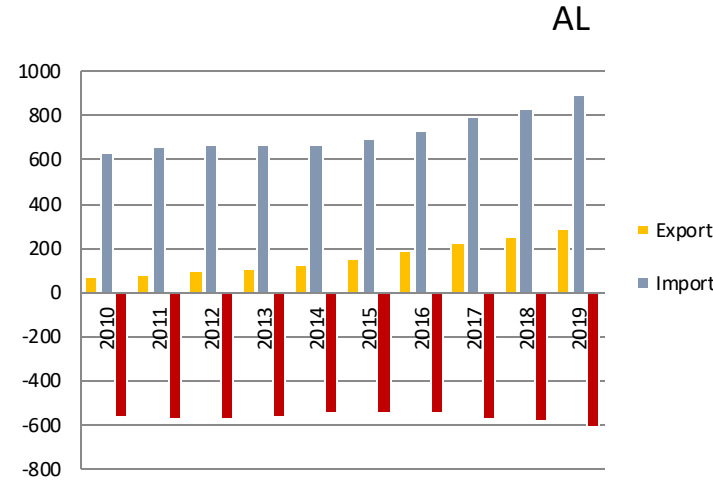
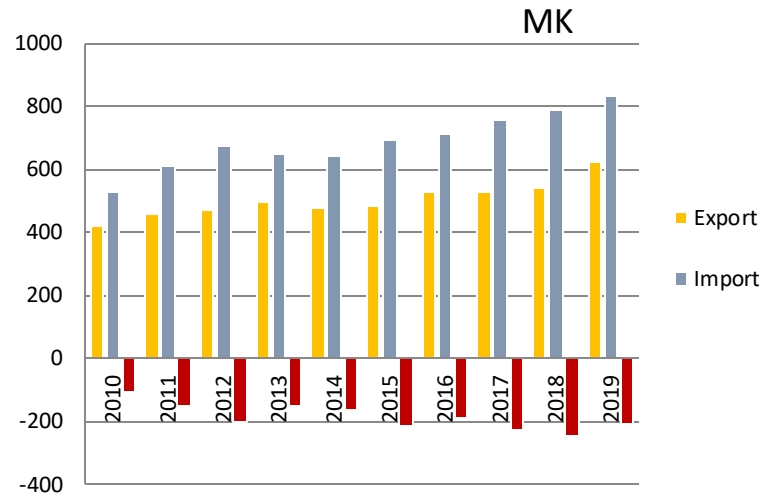
RS



Key agricultural statistics (average 2010-19)

	AL	BH	KS	MK	MN	RS	TR
Gross value added of the agriculture, forestry, hunting and fishery sector (A)							
GVA (at current prices)	2023,9	912,4	603,8	826,1	276,6	2489,3	47882,0
Share in GVA of all activities	21,8	7,7	13,7	10,7	9,0	8,0	7,8
Employment in the agriculture, forestry, hunting and fishery sector (A)							
Number (in 000)	476,0	151,2	:	120,0	14,3	486,9	5309,6
Share in total employment	46,3	18,5	:	17,2	6,5	19,2	20,7

Trade in food and agricultural products



General notes

- ✓ Regular update of the statistical data is already established process for all countries
- ✓ For some countries there are missing data during the whole period, meaning that these data are still not available in the country so harmonization is still needed
- ✓ Regarding the focus – organic production and socio-economic data
 - ✓ In most countries organic production data are missing (some countries have data on capacities (ha and LU) but not on production)
 - ✓ General socio-economic data in most countries also missing, especially data on migration or employment
 - ✓ Total labour data-in some countries missing, in some countries detailed data (education, gender, etc.) missing
 - ✓ Labour in rural areas in most countries are missing

**Agricultural Policy Measures Database (APM) -
– progress information**

Data provided (so far):

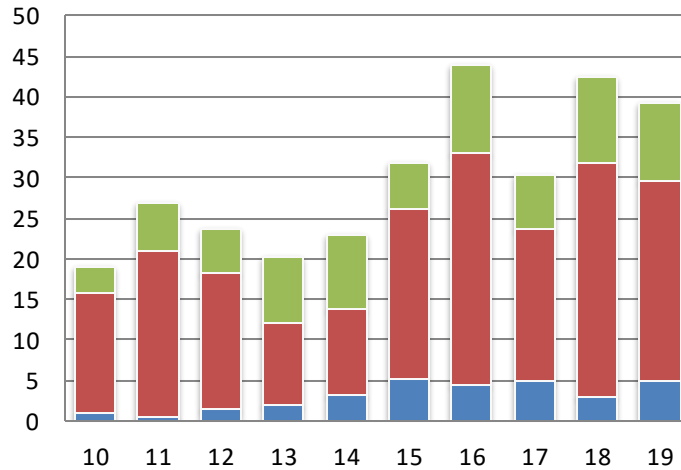
	APM	STAT – T.8	RD scheme*	Report
AL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	1 st draft
BA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	1 st draft
KO	old APM template	<input checked="" type="checkbox"/>	No	1 st draft
MK	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> in details	1 st draft
MN	<input checked="" type="checkbox"/>	T8.3 to be added	<input checked="" type="checkbox"/> brief	1 st draft
RS	<input checked="" type="checkbox"/>	T8.2 and 8.3 to be added	No	not yet
TR	1st draft	-	No	not yet

* Are we to proceed with RD scheme? Objective (its planned use) vs. Reality (corona pandemics)

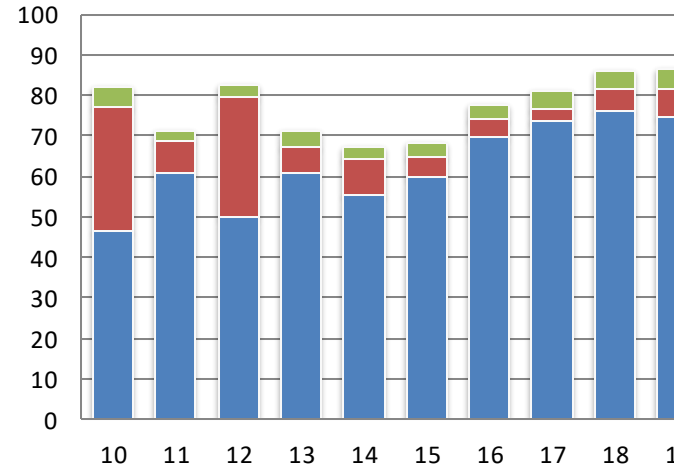
* Policy analysis to be supported with APM graphs.

TOTAL BUDGETARY SUPPORT TO AGRICULTURE (million EUR)

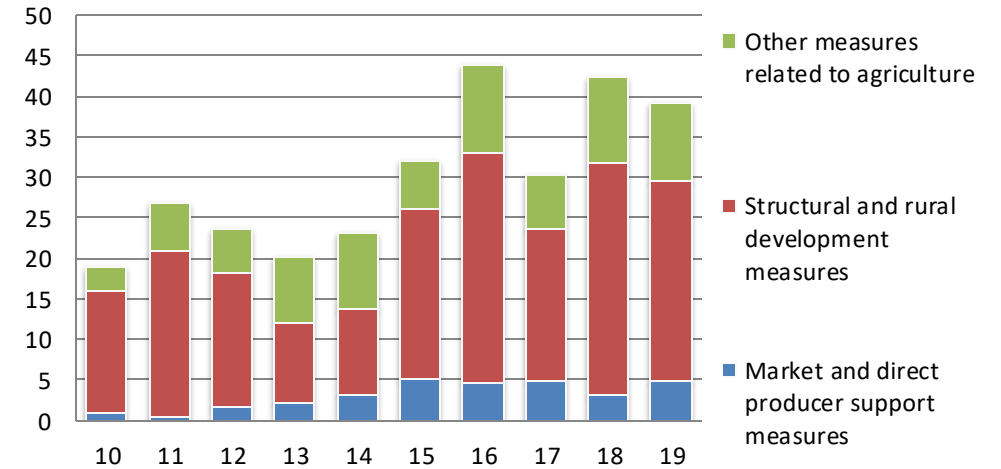
Albania



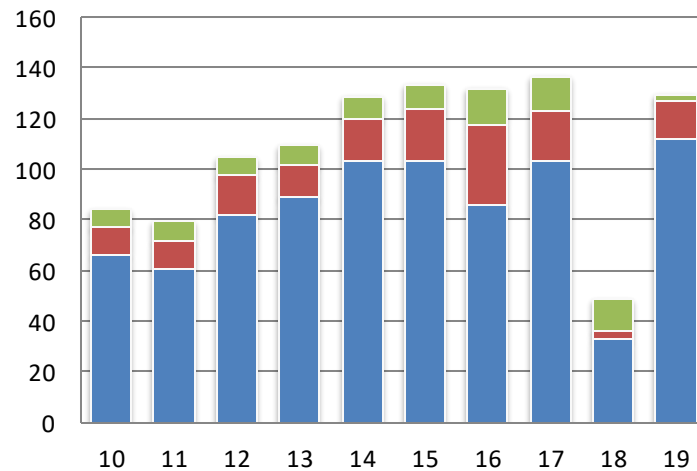
Bosnia and Herzegovina



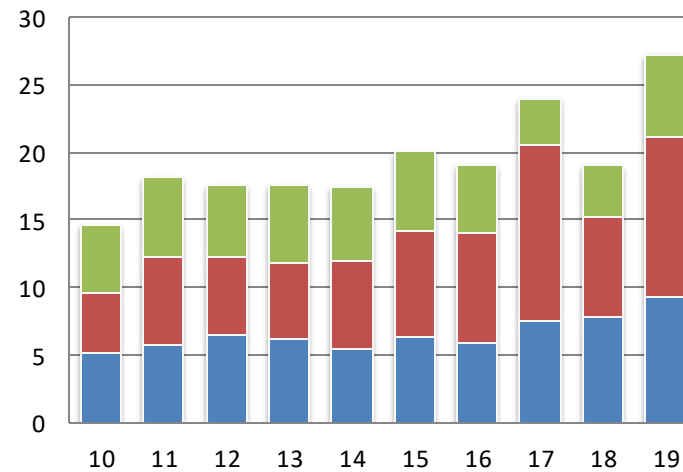
Kosovo*



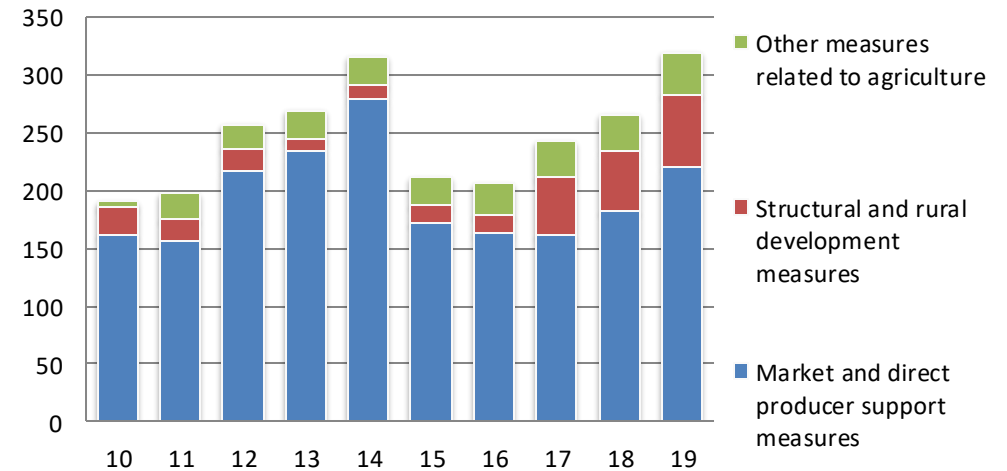
North Macedonia



Montenegro

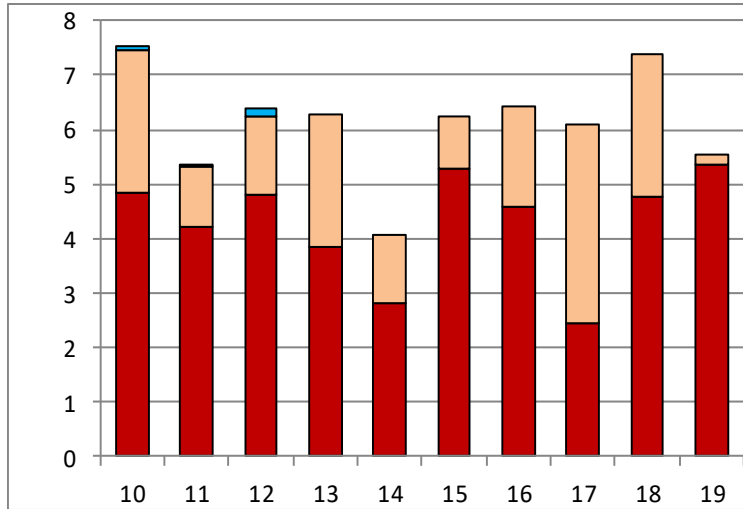


Serbia

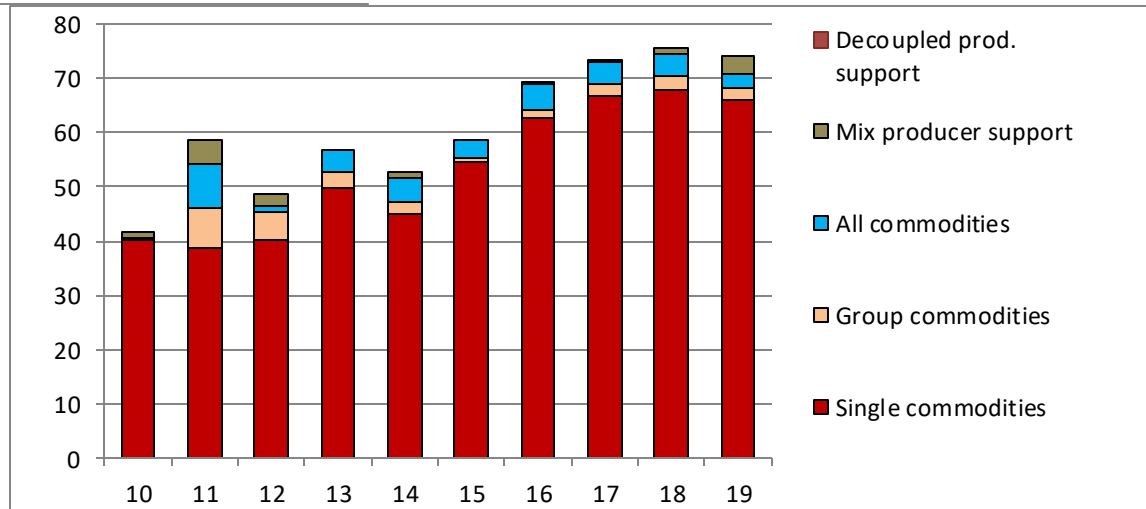


Direct producer support measures by commodity type (million EUR)

Albania

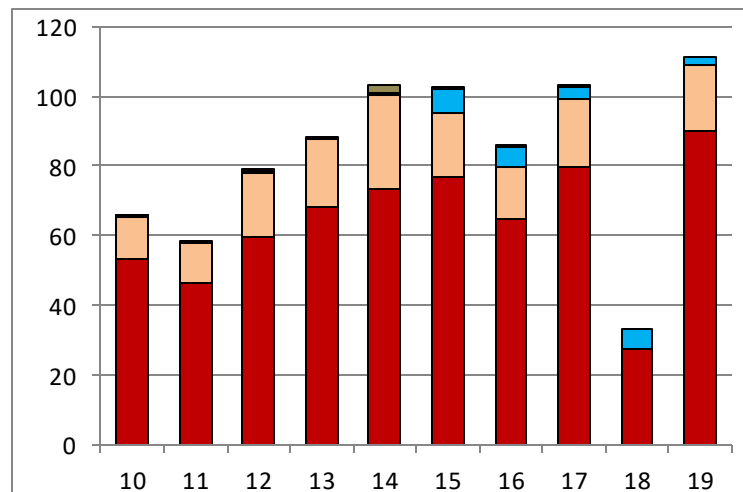


Bosnia and Herzegovina

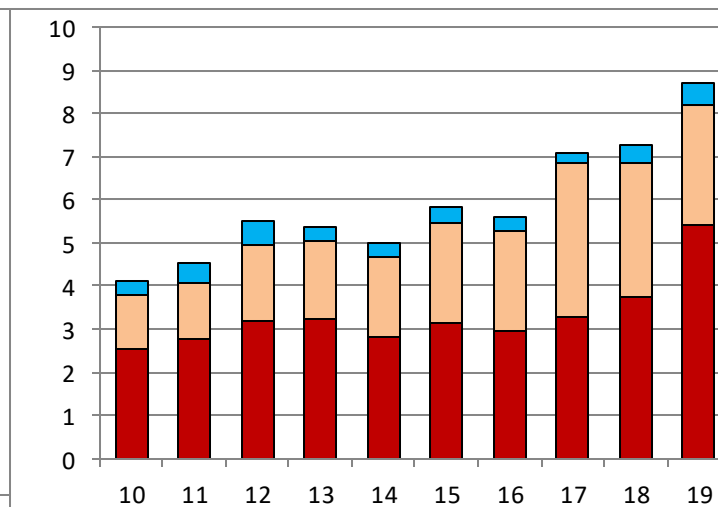


Kosovo*

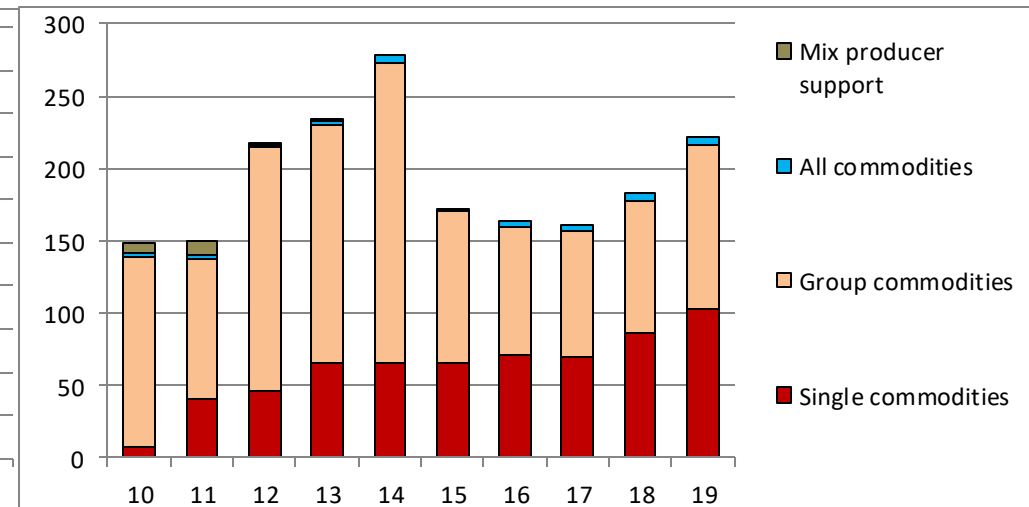
North Macedonia



Montenegro

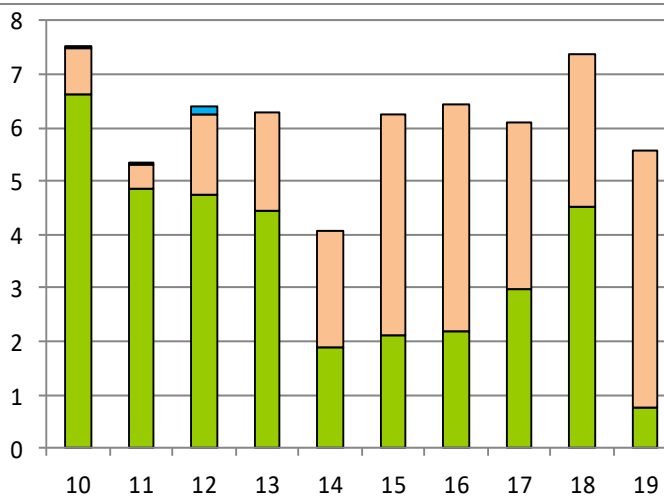


Serbia

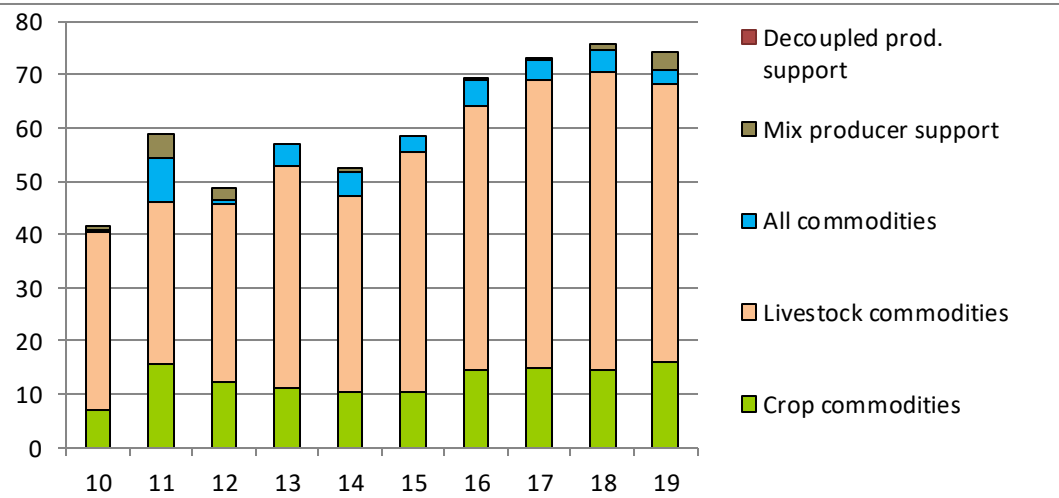


Direct producer support measures by main sector (million EUR)

Albania

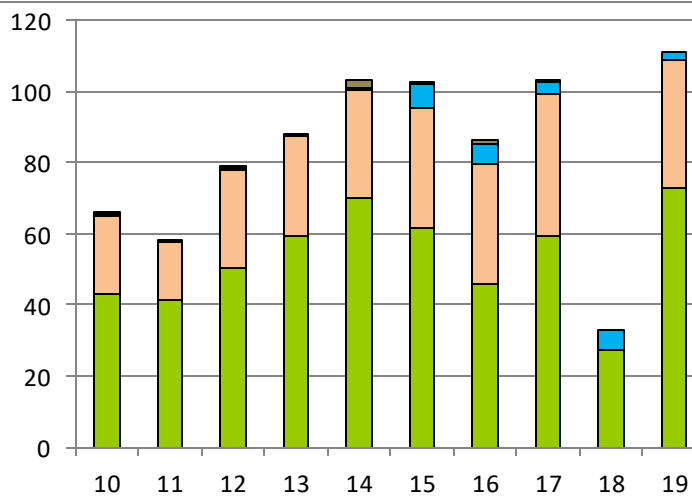


Bosnia and Herzegovina

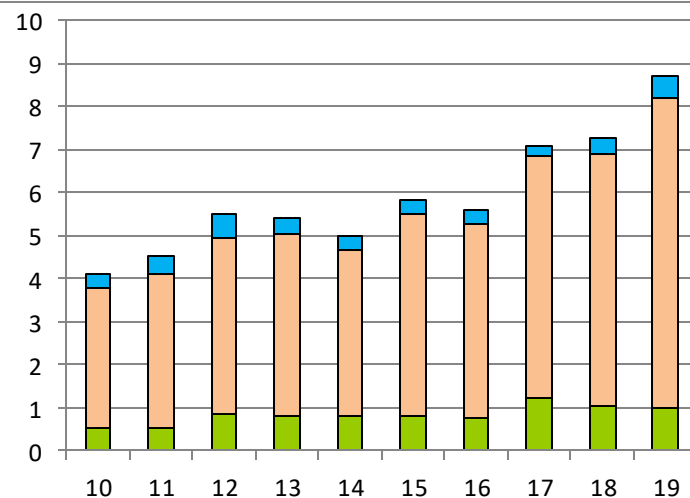


Kosovo*

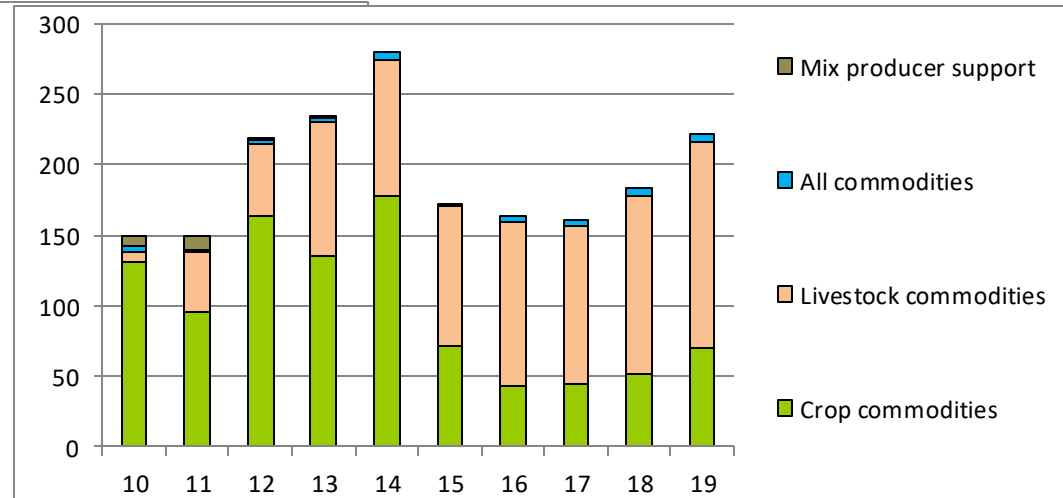
North Macedonia



Montenegro



Serbia



Follow up...

- ✓ Presentation on national country reports (today)
- ✓ Feedback on your reports (until July 15th)
 - ✓ and individual communication with each team (communication medium upon agreement)
- ✓ Other deadlines (presented by Dori)

stay healthy