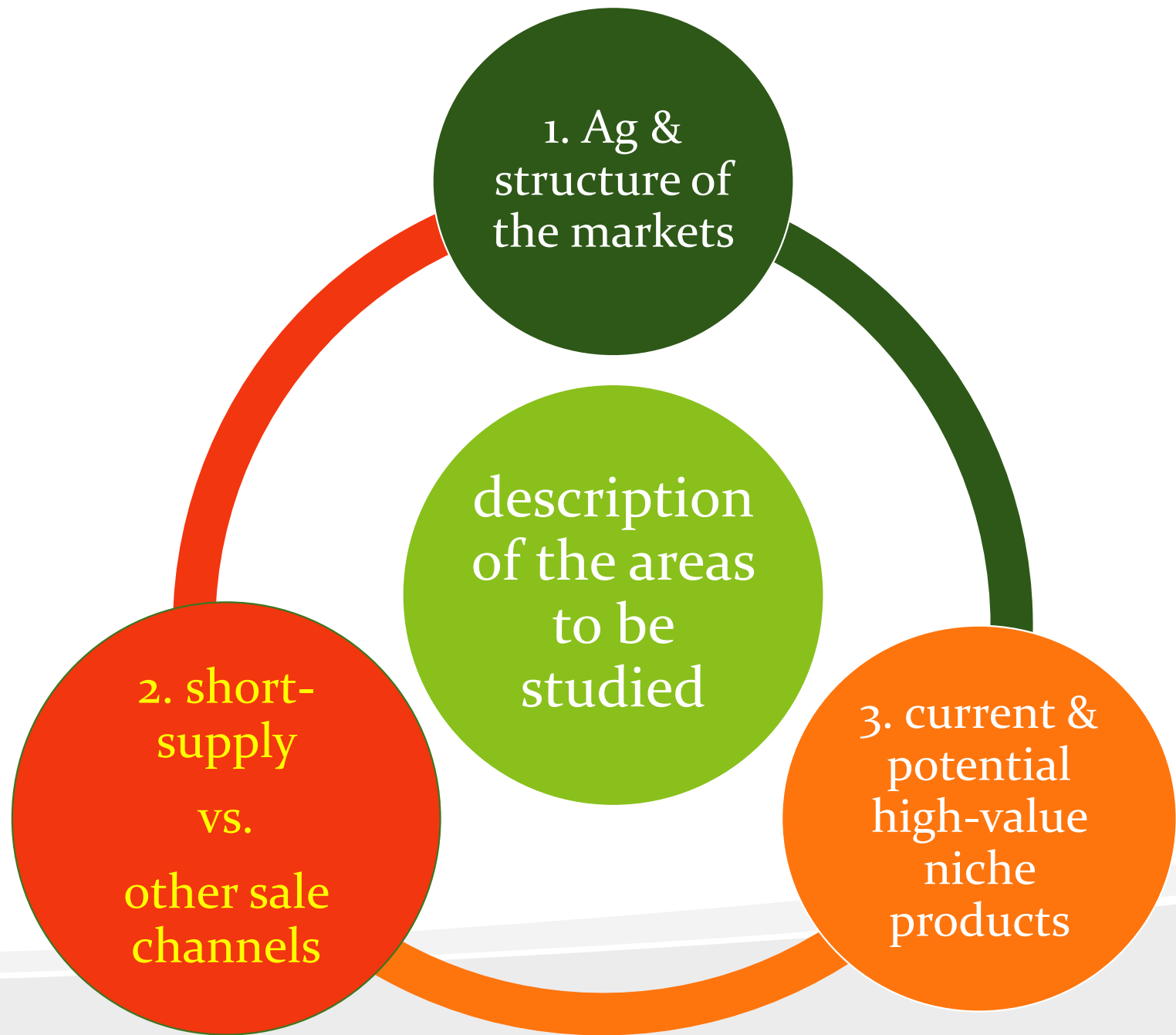




# WB and Turkey study area







# Description of the areas provided

## Country based

- Albania
- B&H
- Kosovo\*
- Montenegro
- North Macedonia
- Serbia
- Turkey

## Sub-region based

- WB ABD Regions
  - Drina-Sava
  - Drina-Tara
  - Krsh
  - Prokletije-Bjeshket e namuna
  - Sharra
  - Prespa
  - Pchinja
- Antalya



# 1. Description of the ag-sector & markets structure provided

- general situation in agriculture sector and marketing of agriculture products in respective countries/territories
- socio-economic characteristics for different subsectors



## 2. Supply chains

- **long** – export & national,
- **short** - local urban, local rural

### Short vs. Long Supply Chains:

**long:** Wholesaler (storage, freezer, retail chains), Processor (slaughterhouse, food industry)

**short:** Direct individual (on-farm/pick-your own, selling own processed products including in own or others local tourism) and off-farm), collective (farmers shops/retail and green-markets, HORECA)

## Existing & potential selling channels (not exhaustive)

- 1. On-farm direct sale**
  - 'Pick-your-own' systems
  - Own agritourism (gastronomy)

- **Delivery**
  - Direct delivery to homes of final consumers
  - Box schemes/internet selling
  - Solidarity purchasing groups

- **Markets**
  - Street market
  - Local farmers' markets
  - Urban farmers' market

- **Small businesses**
  - Local small shops
  - Local processors or gastro businesses
  - Urban gastro businesses

- **Farmers' organisations**
  - Cooperative
  - Producer organizations (POs)
  - Other farmers' groups/associations/unions etc
- **Long supply chain buyers**
  - Processors/agri-food industry
  - Supermarkets/retailers chains
  - Traders/wholesalers and exporters
- **Own processing**
  - The crop was processed on the farm before selling



### 3. High-value niche products groups identified

- estimation of the importance of current niche products will be considered through exploring data from available literature, including SWG documentation, SR and experience of JRs, data from farmers markets and chambers of commerce
- identification of potential high-value products will be identified through assessment of GI registers and other quality schemes and initiatives, demand of the tourist and service sectors



# Current & potential high-value niche products groups

## Related agriculture products:

*Vegetables (peppers, tomato, olives etc.*

*Fruits (plum, raspberry, apple etc.)*

*Milk (goat, sheep & cows milk)*

*Meat (mutton/lamb, goat kind and calve)*

*Fish and molluscs (aquaculture)*

*Mushroom*

*Herb*

## Niche products

- Vegetable preserves (ajvar, sour preserves, preserves in oil, brine etc.)
- Fruit preserves (dry fruit, jams, juices and sweets/organic or conventional)
- Traditional dairy products made of raw milk (ripened white cheeses in brine and hard yellow cheeses, milk cream etc.)
- Fresh roast-ready or traditional dishes, dried and/or smoked, from autochthonic breeds)





# Tentative List Of Discovered Niche Products



1	Plum <sup>7, 1a, 5a, 4b</sup>	<b>Preserves:</b> Plum winter preserves <sup>1b, 2a, 2b</sup> , jams, slatko <sup>1b</sup> , dried plum coated, plum brandy/ <b>Gastronomy:</b> plum sweets, bacon-plum rolls etc.	Požega/Blue	Drina-Sava	Bosnia and Herzegovina Serbia	Turkey
2	Raspberry <sup>6a, 6b</sup>	<b>Preserves:</b> Juices, liqueurs/ <sup>2, 4</sup> <b>Gastronomy:</b> Sweets <sup>1a, 1b</sup>	No	Drina-Tara	Bosnia and Herzegovina Montenegro, Serbia	Kosovo*
3	Apple <sup>2c, 7</sup>	<b>Preserves:</b> Jams, juices, apple chips/ <b>Gastronomy:</b> Apple pies & other sweets	No	Prespa	Albania N.Macedonia	Serbia



# Tentative List Of Discovered Niche Products



Organic vegetables	<b>Preserves: Package of fresh products</b> 2b, 4b, 5, 6,	No	Antalya	Turkey	Albania, N. Macedonia, Serbia
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# Tentative List Of Discovered Niche Products



Herbal  
Teas &  
Essential  
oils

Herbs <sup>6a,</sup> <sup>6c</sup>	<b>Preserves:</b> Herbal tea <sup>4</sup> Essential oils <sup>4</sup>	Herbs, local varieties	Prokletije- Bjeshket e Namuna	Albania Kosovo* Montenegro	Serbia N. Macedoni a Bosnia and Herzegovi na
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# Tentative List Of Discovered Niche Products

Bee  
products

Honey <sup>6c</sup> , 7	<b>Preserves: Honey and nuts</b> <sup>3b, 3c</sup> <b>Mead (medovina)</b> <sup>7a, 1b</sup>	Honey from mountain meadows - Vlasina, Osogovo, Herzegovina sage	Pchinja- Kraishte	N. Macedonia Serbia	Bosnia and Herzegovin a Montenegr o
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# Tentative List Of Discovered Niche Products



Sheep  
Meat  
Products


7	Lamb and mutton <sup>1a, 3a, 7</sup>	<p><b>Preserves:</b> Dried and smoked mutton – ovčija stelja<sup>2a</sup>/  <b>Gastronomy:</b> Roasted Lamb, Lamb under (sač), Lamb in mud etc.<sup>1b</sup></p>	Zeckel Lamb rised in mountain pastoral systems (Sharra, Pirot tec. strains	Sharra	Albania Kosovo* N.Macedonia	Turkey Serbia Montenegro Bosnia and Herzegovina
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# Tentative List Of Discovered Niche Products



Row milk (cows, sheep, goats) <sup>1b</sup> , 4b, 6a, 7	<b>Preserves: Cheese from the sheep sack</b> <sup>1b, 4b, 4c,</sup>	Gatačko cattle, zeckel sheep, busha and crossbreds cattle <sup>6a</sup>	Krš	Bosnia and Herzegovina Montenegro	Turkey (Antalya goat cimi cheese in goat skin- tulum)
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For each of the identified current or potential high-value niche product respective food chains were elaborated in terms of:

- ✓ market and governance structure
- ✓ number and size of operating agents
- ✓ relevant food quality standards
- ✓ policy incentives and financial instruments (e.g., IPARD)  
promoting creation of short supply chains

# Short-supply vs. other sale channels brief assessment (start)

PRIMARY PRODUCT	VALUE CHAIN TYPE	MARKET	SECONDARY AND TERTIARY PRODUCTS	CONSUMER	SUCCESS FACTORS/OBSTACLES	SECONDARY PRODUCT
NTFP (greens, mushrooms, fruit, herbs and aromatic plants from nature + grown)	Long	External	Fresh	Distant (through purchaser, wholesaler to retail, processor and gastronomy to consumer)	Safety & quality Quantity require more middleman and decrease income, limited number of species on demand	Dogwood/cornelian cherry juice, BIH
	Short	Local	Preserve (juice, jam, brandy, tea, spices)	Direct marketing, collective channels	Quality. Engage traditional knowledge and skills. Diversity Food safety regulations, registering required, focalisation, taxation	
			Gastro (dishes, drinks)	Rural tourism, local restaurants	Quality, attractiveness, diversity, territory and seasonally specific. possible direct involvement Purchase directly from collectors legally impossible. Control of species very hard to organise	





## Done/the follow-up of the analysis of target areas

### Data sources used so far:

- primary sources – farmers, processors and market parties
- secondary sources - all other relevant empirical & theoretical literature
- statistical reports and databases,
- policy documents and other literature

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### Data source to be used:

- results of questionnaires
- materials collected on the field during interviews