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STRATEGIC GUIDING DOCUMENTS

TO FOSTER THE FURTHER DEVELOPMENT OF THE ORGANIC SECTOR IN THE SOUTHEASTERN EUROPE COUNTRIES/TERRITORIES

2024 – 2027

2024

November

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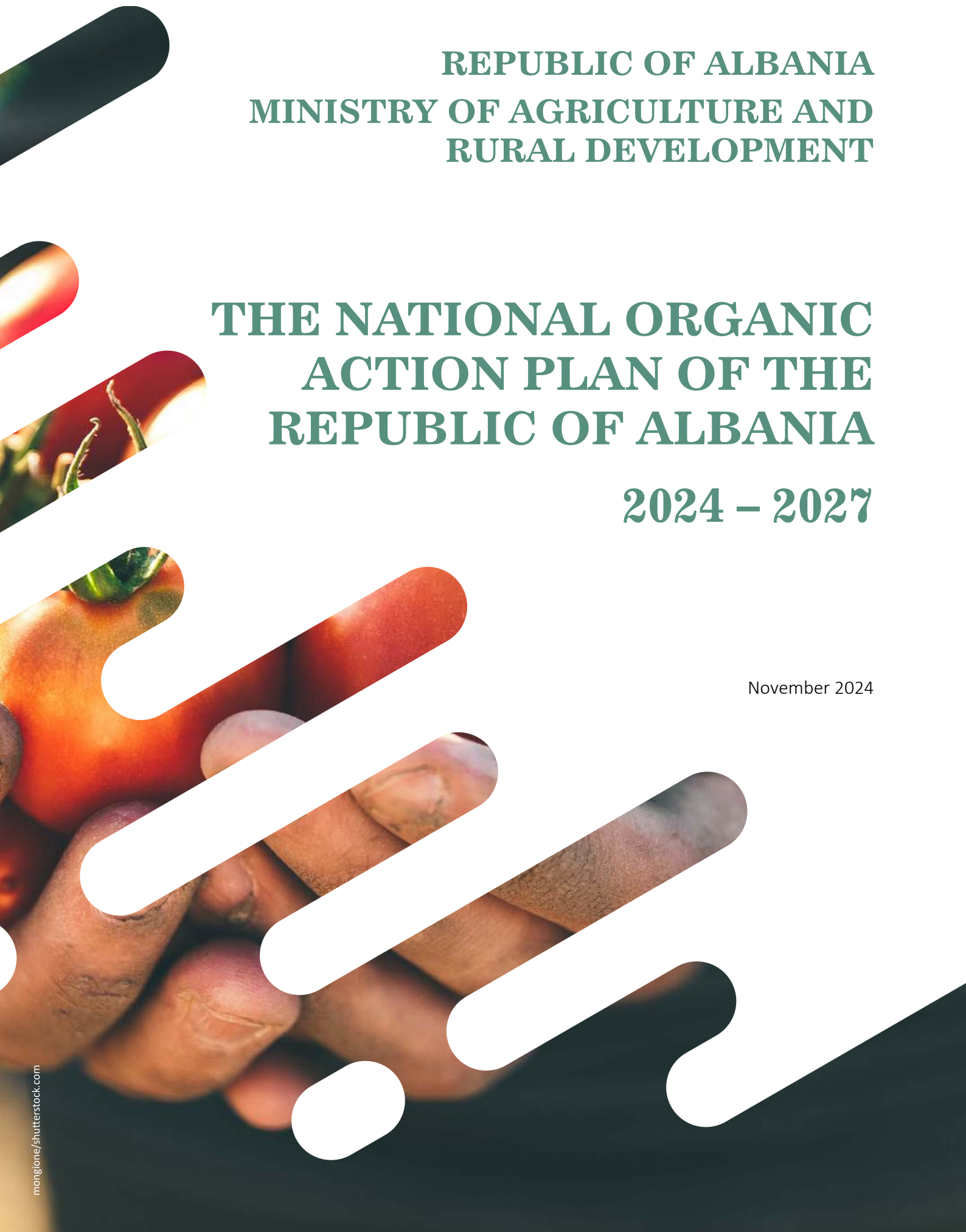
REPUBLIC OF ALBANIA

MINISTRY OF AGRICULTURE AND RURAL DEVELOPMENT

THE NATIONAL ORGANIC ACTION PLAN OF THE REPUBLIC OF ALBANIA

2024 – 2027

November 2024



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LIST OF ABBREVIATIONS

AIDA	Albanian Investment Development Agency
AAM	Albanian Association of Marketing
ARDA	The Agricultural and Rural Development Agency
BioAdria	Organic farmer association
BTSF	Better Training for Safer Food
CB	Certification Body
CIHEAM Bari	CIHEAM Bari- Mediterranean Agronomic Institute of Bari
COP	Commission on Organic Production
DRSPARD	Directorate of Policies, Strategy and Programs of Agriculture and Rural Development
EU	European Union
FBO	Food Business Operator
FiBL	Research Institute of Organic Agriculture
IFOAM	International Federation of Organic Agriculture Movements
IOA	Institute of Organic Agriculture
IPARD	Instrument for Pre-Accession Assistance in Rural Development
MAPs	Medicinal and Aromatic Plants
MARD	Ministry of Agriculture and Rural Development
NAVPP	National Agency of Veterinary and Plant Protection
NFA	National Food Authority
NGO/GO	Non-Governmental Organization/Governmental Organization
NOAP	National Organic Action Plan
OF	Organic Farming
OFIS	Organic Farming Information System
RAAE	Regional Agency of Agricultural Extension
SASA Project	Sustainable Agricultural Support in Albania
SPMS	Sector of Production and Marketing Standards
SWG	Regional Rural Development Standing Working Group
SWOT	Strengths, Weaknesses, Opportunities, Threats
TAIEX	Technical Assistance and Information Exchange
TRACES	Trade Control and Expert System
USAID	United States Agency for International Development

Executive summary

The National Organic Action Plan (NOAP) of Albania (2025–2027) **aims to foster the growth and sustainability of the organic agriculture sector by addressing production, market development, regulatory frameworks, and education. It provides a strategic roadmap for developing Albania's organic agriculture in alignment with EU standards, ensuring sustainable growth, economic opportunities, and environmental benefits.**

Sector Overview

Organic farming in Albania has grown slowly, with major contributions from the wild collection of medicinal and aromatic plants (MAPs).

Cultivated organic agricultural land remains limited, comprising 796.6 hectares in 2023.

Exports dominate the organic sector, with products like MAPs, olive oil, and fresh herbs primarily exported to EU countries, the U.S., and Switzerland.

Strengths and Challenges

Strengths:

- Rich natural resources and improved legislation.
- Increasing expertise in certification and organic standards.

Challenges:

- Limited consumer awareness and domestic demand for organic products.
- Insufficient support measures, weak technical capacities,
- Lack of a national organic association.
- High costs for certification and limited availability of organic inputs.

Strategic Objectives

1. **Expand Organic Production and Processing:**

- Increase the cultivated organic area and support processing infrastructure.

2. **Develop Domestic and International Markets:**

- Promote organic products through awareness campaigns, introducing the national logo, and export facilitation.

3. **Strengthen Legislative Frameworks:**

- Alignment with EU acquis and ensure effective implementation and enforcement mechanisms.

4. **Foster Innovation and Research:**

- Enhance technical knowledge through applied research and capacity-building initiatives.

Action Areas

1. Production & Processing: Provide infrastructure support, training for organic practices and subsidies for certification and conversion.
2. Market Development: Launch consumer awareness campaigns, establish dedicated organic markets, and facilitate export promotions.

3. Legislation & Policies: Complete legislative framework alignment with the EU, establish a database of organic operators, and enforce compliance measures.
4. Education & Research: Build capacities through training, support organic applied research, and collaborate with international organizations.

Key Opportunities

- High export potential due to increasing international demand.
- Favourable conditions for eco-tourism and agro-tourism integration with organic farming.
- Support from government policies and international donors.

Implementation and Monitoring

The NOAP outlines specific actions, stakeholders, and budget sources for each objective. The Ministry of Agriculture and Rural Development (MARD) will oversee coordination, with support from local and international partners. Regular monitoring and evaluation will ensure effective progress.

1. Sector analyses

1.1. The Albanian organic sector until 2024

Organic farming (OF) in Albania has a relatively short history and is not yet well-established, considering the limited number of organic operators and the small area of organic land.

The launch of certified organic farming is closely linked with the Swiss funded SASA Project (Sustainable Agricultural Support in Albania, 2001–2011) which was implemented by FiBL. Its first success was the organic certification of the olive oil, which was exported to Switzerland. This was followed by the organic certification of a few exporters of MAPs from wild collection. The following years were quite dynamic, with 2004 being a particularly important year at the regulatory level since the first national law on OF was published (National law no.9199/2004). In 2005, the association "BioAdria" was established, gathering different organic operators.

Although BioAdria had over 100 members by 2010, it primarily had a project implementation function, which led to its gradual dissolution after the completion of the SASA project. To this day, it has not been replaced by any other legitimate association of organic producers. In 2006, the control body Albinspekt was founded and remains operational as a successful company. In 2019, it was acquired by Bio.inspecta AG, which now holds a market share of over 90%. Bio.inspecta is the only control body recognized by the Ministry for the inspection and certification of organic farms according to the Albanian organic law/standard (Law 106 / 2016). The *Institute of Organic Agriculture* was established in 2010 in Durrës, as a research and education institute. Two years later, the *Ministry of Agriculture and Rural Development* established the State Commission for OF as the responsible for the approval and supervision of control bodies.

In 2016, the Law 106/2016 "On organic production and labelling of organic products and their control" was adopted, based on EU regulation 834/2007, as well as by-laws based on regulation 889/2008/EC.

1.2. Legislative framework

The new Law 104/2024 "For Organic production, labelling of organic products and their control" based on EU Regulation 848/2018 was adopted by the Parliament on 19 September 2024 and will be implemented/enforced 2 years after its adoption. The Law is largely aligned with the EU *acquis* on organic production mirroring regulation 2018/848 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007, except for some mandatory provisions that refer to member states, such as the requirement to provide information and reports related to the organic sector and trade to the EC, use of the OFIS and TRACES information systems, and import rules from third countries. These provisions are partially aligned and adjusted to national conditions.

The Law creates legal ground for further alignment with the EU *acquis*.

The following bylaws, partially aligned with Commission Regulation (EC) No 889/2008 of 5 September 2008, which lays down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products regarding organic production, labelling and control, are being implemented:

- Decision of Council of Ministers, no. 336, date 6.6.2018 "On detailed rules for organic plant production and seaweed production",
- Decision of Council of Ministers, No. 830, date 18. 12. 2019" On detailed rules for collection, packaging, transport and storage, labelling and control, of organic products",
- Decision of Council of Ministers, no. 859, date 24.12.2019" On determining the composition, functioning, organization and tasks of the Commission on Biologic Production",
- Decision of Council of Ministers, no. 1030, date 16.12.2020 "On detailed rules for production of processed feed and food ",
- The Order of Minister of Agriculture and Rural Development No.228, date 8.6.2020 "On the approval of list of products and substances used in processing of biological food",
- Order of Minister of ARD, no. 349, date 25.7.2022 "On list of products and substances allowed to be used in organic production", partially aligned with Commission Regulation (EC) No 1165/2021.

1.3. Institutional framework and implementing

MARD is Central Competent Authority responsible for the development and coordination of policy and legislation on organic production, through the Sector of Production and Marketing Standards (SPMS) under the Directorate of Policies, Strategy and Programs of Agriculture and Rural Development (DPSPARD).

The inspection and certification of organic operators and granting the derogations on using the non-organic plant reproductive material is delegated to control bodies (CBs). The CBs must be approved by COP for carrying out inspection and certification of organic products for the scope of national law. To perform these tasks, the CBs must meet the following requirements:

- to be registered in the Business Entities Register of the Republic of Albania.
- to have established the organizational structure, risk assessment procedure and standard control procedure.

- to comply with all the requirements with regard to technical equipment, and human resources capacity.
- to be accredited for the most recently notified version of the international harmonised standard for 'Conformity assessment (ISO/IEC17065 standard).

Currently, four CBs (bio.inspecta AG, Ecocert, BioagriCert and ACert) are recognized by the EC and have been active in Albania. However, only bio.inspecta AG is approved by the Ministry (COP) to certify according to the scope of the national law. (Bioinspecta, Ecocert, and ACert are also recognized by the EU to operate in Albania under the scope of the new Regulation 848/2018/EC).

The new law establishes the competent authorities responsible for official control of organic production. National Food Authority (NFA) is responsible for carrying out official control of organic food and feed, including imported products, to ensure that certified organic food business operators comply with the rules on organic food and feed, as well as the regulations on labelling of organic products placed on the market.

The National Agency of Veterinary and Plant Protection (NAVPP) is responsible for conducting official control of organic primary production in farms, and ensuring that certified farms comply with the rules on organic production. In addition, NAVPP is responsible for granting derogations from livestock and aquaculture production rules.

The Ministry has consistently supervised the activities of control bodies approved by the Minister for the scope of national law through office audits and witness audits conducted annually. According to the new law, the supervision of the control bodies approved for the national law will be carried out by NFA in cooperation with NAVPP, which must provide the supervision report to the COP, which evaluates and makes decisions on the activity of the CB.

The interinstitutional COP is responsible, for approval and supervision of CBs operating according to national law, as well as the notification/registration of CBs for the international organic standards. It also grants the derogations from production rules such as retroactive recognition of the conversion period, derogations in the case of catastrophic events. Control bodies operating under national law are approved and withdrawn by the order of Minister.

A register of organic operators is not yet in place. The list of certified organic operators can be found on the website of CBs. According to the new law the respective competent authorities for official control (NAVPP and NFA) are responsible for reception of applications for the registration of organic operators (organic farms and FBO including importers and exporters).

Furthermore, the new law establishes provisions on administrative offenses and sanctions to be applied to organic operators and control bodies by the competent authorities of official controls.

1.4. Statistics

Despite the dynamic historical development and continuous improvement of regulatory aspects, the sector's growth cannot be seen as satisfactory, especially when considering the cultivated organic agricultural area. Organic forests and wild collection areas dominate the sector, with a total of 471'193 ha in 2023, especially MAPs, which account for 97% and are mainly exported to the EU, USA, Switzerland, etc. The cultivated land covers a significantly smaller area (796 ha in 2023), with a narrow range of plant species being cultivated. MAPs make up 64.5%, followed by orchards 23.3 % (olive trees account for 75,2 % of total orchards) while other crops, such as cereals, vineyards, vegetables, and forage, are negligible.

The number of certified organic operators has been increased over the years, reaching 160 in 2023.

The available statistical data on organic farming for recent years are as follows:

Table: Statistics on organic farming production, harvesting of organic wild plants, and number of operators in the organic sector

	2021	2022	2023
Total wild and forest area (ha)	**556 144**	**461 583**	**471 193**
Total wild and forest production (tons)	11,733	12,678	7295
Cultivated area, fully organic (ha)	913	568	681,79
In conversion area (ha)	184	163	114.81
Total organic cultivated area (ha)	1,097	731.3	796.6
Total organic cultivated production (tons)	2,599	2,091	1599.3
Total (in conversion and fully organic) cultivated MAPs (tons)	2114	1369	514.6
Total no. of organic operators	139	138	160

1.5. Domestic market and promotion

The domestic market is dominated by imported organic products which are selling in the large retail shops as supermarkets, and specialized retail shops offer organic products such as **Bioju, Rossmann, Spar, Conad etc.**

Direct on-farm sales are also an active marketing channel, though this is mostly limited to certain products, such as olive oil. Direct sales typically occur through farm restaurants, agrotourism farms and hotels with small agricultural production, such as Mrizi i Zanave, Bio Farm Gramsh.

1.6. Export markets

The export of organic products from Albania began in 2001 with olive oil exported to Switzerland and certified by "bio.inspecta". Export remains the primary focus for Albanian organic operators. The main export destinations are Europe (mainly Germany and Austria), United States and Switzerland.

The export of organic MAPs is led by companies such as AlbKalustyan, Biobes shpk, Gjedra shpk, Filipi Company etc. In addition to exporters of MAP exporters, there is one exporter of organic fresh herbs (Elite AE shpk) and 2 organic olive oil exporters, Musaj Olive Oil and Shkalla SH.

In 2022 the export of organic products to the EU decreased by 26% compared to 2021, largely due to the withdrawal of several major exporters (mainly exporters of MAPs), as they lost their market post-COVID.

Table: Export of organic products from Albania to EU (*EC report 2023*)

	Export of organic products from Albania to the EU (ton)
2020	1.825
2021	1.970
2022	1.440
2023	1.263

1.7. Supporting measures of the government

The payments on organic farming are provided continuously over the period 2020-2023.

Support measures for organic production are designed to assist farms in their conversion to organic production and organic farms. The beneficiaries of this support are agricultural holdings or cooperatives. The farm must have a minimum area of 0.5 hectares, and the beneficiary should either own the land or have a lease agreement for at least 5 years.

The support is provided on a per-farm basis. The level of support depends on the years in conversion to organic production or certified as organic:

- First year: In the first year in conversion to organic farming, each farm is entitled to €1000 in support.
- Second and third year: In the second and third year in conversion, the support increases to €1500 per farm.
- Certified farms: Farms that successfully achieve organic certification receive the highest level of support, which is € 2000 per farm.

The budget and beneficiaries of the national support scheme for organic farming over the last three years are as follows:

Table: Payment to the organic sector

Year	**Budget (EUR)**	**No of Beneficiaries**
2021	91,429	71
2022	90,756	70
2023	141,176	105

2. Overview of Strength, Weaknesses, Opportunities and Threats

2.1. SWOT analyses

The analyses find the following strengths, weaknesses, opportunities and threats:

Strengths	**Weaknesses**
• Favourable natural resources, • Dynamic improvement of legislative framework on organic production • Experienced national control body	• Lack of active organic association representing organic producers • Fraudulent use of the term organic in the domestic market • Low level of technical capacities among organic operators remains • Limited availability of organic inputs • Weak extension services for organic farms and less research in organic agriculture • Consumer awareness
Opportunities	**Threats**
• High demand for organic products mostly by export market • Favourable natural conditions and government willingness to support the organic sector • Donor programs are supporting organic agriculture • Favourable conditions for developing eco-tourism • Capacity building programs could strengthen the technical capacities	• Low consumer awareness about organic production and products • Insufficient national support measures • Lack of labour forces in rural areas • Lack of demand for organic products on the national market • No adequate advisory services • Higher costs for organic inputs

2.2. Challenges/ priorities identified

The establishment of an efficient control system is one of the main challenges for the organic agriculture (OA) sector in Albania to ensure fair competition and to fulfil consumers' demandss for high-quality food products.

Among the priorities for the sector development and growth, the following should be highlighted:

- diversification of production (increase in the cultivated area);
- further harmonization of national legislation with EU standards;
- promotion and awareness-raising among local consumers, with the objective of increasing the demand and thus developing the domestic market.

- enforce the protection of the term "bio" for food operators informing the public about the organic control system and introduction of the Albanian organic logo.
- Organic farming in Albania requires investments, for post-harvest infrastructure for fruit and vegetable producers, mechanization, and in agro-tourism, which is a thriving subsector and well combinable with organic farming.
- Establishment of an organic operators' association open to all segments of the value chain, including all major businesses. If such an association makes the first steps on its own, it will receive government and donor support to represent the Albanian organic sector abroad on different trade fairs and to develop marketing activities within the country.
- Developing of the local market, especially in connection with restaurant catering and agro-tourism.

3. Sector needs

3.1. Identification of stakeholders

Stakeholder organizations that influence the **organic sector** have been identified as relevant to the process. These include the Ministry of Agriculture and Rural Development, Control Authorities, Donors, Leading Producers, Processors, Exporters, Traders, Importers, Certification Bodies, NGOs, Consumers, to be addressed and involved in the process.

Among these stakeholders, the following have a major impact to the capacity and sector development:

- *MARD*, ARDA, NFA and NAVPP as they are supporting the organic production through national legislation, control in the whole organic chain (farm, processing, import and market), subsidy schemes,
- RAAE (Regional Agency of Agricultural Extension) providing information on rules for organic production
- *IOA* - providing trainings consultancy and demonstration in the farm for the good agriculture practices and organic requirements
- *bio.inspecta shpk* as the only local certification body and providing trainings and technical knowledge for the requirements of legislation
- Companies such as *Biobes shpk* and *Bidaj etc as* Leader farms to facilitate trials and field days

3.2. Identification of sector's needs

a. Farmer level

Following needs are reported from farmers present in the meetings with stakeholders

- Limited knowledge and experience of farmers related to organic production methods (such as selection of seeds, farm management, allowed inputs etc.)
- Lack of qualified local service providers (public or private) for organic production, who could provide technical trainings,

- Lack of human resources (seasonal staff, farm level)
- Specific knowledge and equipment's for post-harvest activities (drying, processing etc.)
- Lack of domestic market

b. Processor and trader level/ Exporters

- Improving quality of products
- Investing in equipment for further processing of products
- Small size farms
- Lack of cooperation among actors

c. Retailers, domestic market

- Fraudulent use of organic/bio/eco references.
- Consumer awareness for organic products
- Limited offer of organic products;

In the past, external consultants and trainers played a key role in building technical capacities. However, moving forward, local trainers have to be qualified to overtake training sessions and peer learning concepts among organic producers. This shift is especially crucial as it is now essential for existing organic farmers to adapt their management practices in accordance with the new organic legislation.

4. Local Service Providers

Resources available in Albania on the level of service providers

- Few consulting and training organizations exist (e.g. bio.inspecta, AAM, IOA)
- Faculty of Agriculture at the university serves as a know-how provider.
- Foreign organizations (e.g. FiBL, SWG, CIHEAM Bari, USAID) that could continue with technical support.
- Extension services provided by the RAAE

Additional resources needed

- Capacity development for new legislation, market development tools, input lists, etc. (Training of trainers and consultants).
- Strengthening the capacity in the ministry for all actors included in the OS, focusing on policy development, marketing and promotion, advisory services and legislation.
- Organizing exchange visits to other countries; exchange of experiences, best practices, etc.
- Establishment of internal procedures for NFA and NAVPP, regarding the control procedure according to the new law competences.
- Establishment of an organized organic association which would impact organic development in Albania.
- Knowledge and skills of stakeholder organizations how to increase awareness and influence change
- Capacity development for approval and registration of inputs in line with the EU list

5. Scope of the NOAP and its development

5.1. Scopes of the action plan

This action plan is not a law nor an administrative instruction, but a tool to coordinate the sector and to assure coherent and synergetic actions in the country.

NOAP´s purpose is to inform policymakers and the public, as well as to guide stakeholders in their activities. It highlights the opportunities that Organic Agriculture can provide in terms of income generation, resilience building, health and sustainability of agriculture and the food system. It underpins the collaborative nature between public and private development efforts.

The strategy identifies four pillars of measures, which interact closely:

- Action Area 1: Production and Processing
- Action Area 2: Market Development
- Action Area 3: Regulations, Certification and Control, Policies
- Action Area 4: Research, Education, Training, Extension Services, and Cross-Cutting Action Areas

Assuming that if the organic sector has

- productive and profitable operations compliant with organic legislation.
- operations that are managed in line with organic principles and are therefore truly
- sustainable.
- transparent markets with informed suppliers, customers and market facilitators (statistics and rules).
- clear rules that are understood and accepted by the stakeholders.
- enforced rules for actors inside and outside the sector to protect integrity of organic production.
- relevant learning opportunities on all levels,

the organic market will grow rapidly, provide growing income along the value chain, create consumer benefits and help sustaining agriculture and its social and natural environment. Based on this impact hypothesis, the Action Plan outlined in 5.2 details four activity areas and their associated measures aimed at driving development toward the stated objectives and vision.

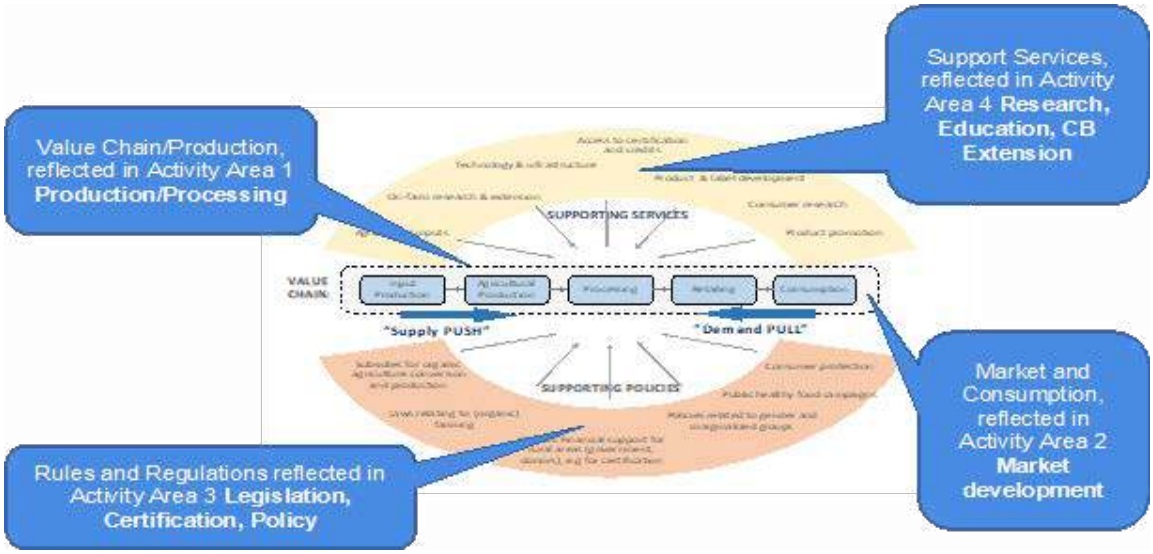

Figure 1: The MSD "donut", visualizing the organic sector with 4 strategic action areas. (Source: FiBL)

Besides, it is recommended to utilise all benefits from cross-cutting activities which strengthen the technical, financial and social capacities of the main actors.

Objectives of the organic sector development strategy

Objective Area 1: Increasing of organic production and processing by enhancing organic and processing farming practices and expand organic agricultural land and processing capacities to meet growing consumer demand for organic products.

Objective Area 2: Developing domestic and international organic markets by public relations, advertising and sales promotion, for export economy strengthening distribution i.e. logistic infrastructure and improve access to markets.

Objective Area 3: Enhancing Legislative Frameworks by developing and implement supportive policies and legislations that encourage the growth of the organic sector while ensuring consumer confidence and environmental sustainability.

Objective Area 4: Support Innovation and Research by investing in research and innovation to advance organic farming techniques, increase productivity, and address challenges.

5.2. Action plan

The Action plan in Table 1 below outlines the measures that are required to achieve objectives and targets. Each activity area/objective includes specific action lines that require focused attention.. While the MARD takes the responsibility for NOAP including overall coordination, monitoring and government some actions, many action lines are under of the stakeholder institutions and private sector. Moreover, numerous identified measures and actions require targeted support from specific donors and projects.

Activity area 1: Production and Processing in the organic sector

1.1 Capacity building

1.2 Establish the positive list of PPP and Fertilizer to be used in organic farming

1.3 Infrastructure development (subsidies for investments)

1.4 Subsidies for certification and conversion

1.5 Subsidies for land cultivation

Activity area 2: Market development

2.6 Public communication and promotion (consumer information

2.7 Strengthening of short chain market

2.8 Value chain facilitation and capacity building

2.9 Export promotion

Activity area 3: Legislation, certification and policies

3.10 Completion and alignment of the legislative framework on organic production

3.11 Database/register on organic operators

3.12 Strengthening the capacities

3.13 Establishment of specific control rules and procedure

3.14 Establishment of procedure for registration of CBs

Activity area 4: Research, education, training and extension

4.15 Capacity building

4.16 Training of trainers

4.17 Organic applied research

4.18 To strengthen cooperation with international agencies

Table 1: action plan

Area 1: Production and processing of the organic sector

	Issue	Action line	Action description	Budget source	Lead responsibility	Support/ participation	Indicators	Monitoring
1.1	Limited knowledge and experience of farmers related to organic production methods (such as selection of seeds, farm management, allowed inputs etc.)	Capacity building	Trainings for organic regulation (focus in the new legislation); practical training at farm level;	Donnor projects	Private sector, associations,	bio.inspecta. RAAE IBA Training providers preferably local for the language issue.	Increase in the number of operators adopting organic practices and obtaining certification	MARD
	Lack of qualified local service providers for organic production, who could provide technical trainings,	Capacity building	Consultancy, conferences, exchange of experiences, round tables for best practices; main challenges of new regulation;	Donor projects	Private sector, associations,	Donor funded projects and associations	Increase in the number of operators adopting organic practices and obtaining certification	MARD
	Small scale farms	Capacity building	Information about group certification, ICS, benefits; Facilitation of producers group (inform and motivating farmers to join organic production)	Donor projects	Private sector, Projects MARD	bio.inspecta,	Operator groups are established	MARD
	Lack of human resources, less interest in the wild harvesting of plants	Capacity building and awareness raising	Awareness raising campaign, fair price for the work	Donor projects	Private sector, Association	MARD	More people are engaged in wild harvesting	MARD
1.2	Availability of required and suitable inputs for farming & processing	Establish the positive list of PPP and Fertilizer to be used in organic farming	Approval and registration of inputs allowed to be used in organic agriculture	MARD	Sector responsible for inputs (PPP and Fertilizer) in the MARD	Input suppliers, CBs	List of approved / registered organic inputs is published	MARD

	Issue	Action line	Action description	Budget source	Lead responsibility	Support/ participation	Indicators	Monitoring
1.3	Specific knowledge and equipment's for post-harvest activities (drying, processing etc.)	Infrastructure development	Access to equipment and machineries (e.g. cultivation, drying/ processing, labelling equipment; storage etc)	Donor projects	Private sector	Donor funded projects and associations	New equipment's are used;	MARD
1.4	Unaffordable costs for farmers for conversion and certification	Subsidies for conversion and certification	Support of farmers in process of conversion and for certification, through national support schemes(subsidies)	Paying agency MARD	Paying agency	MARD	Increased no of organic farmers and organic cultivated land	MARD
1.5	Diversification of organic cultivated production	Subsidies on cultivation	IPARD III support measure "Agri- Environment- climate and Organic Agriculture"	IPARD III program MARD	IPARD Directory in the MARD	Paying agencies	Increase the organic cultivated area of vegetables, fruits trees, vineyard and MAPs	

Area 2: Market development

	Issue	Action line	Action description	Budget source	Lead responsibility	Support/ participation	Indicators	Monitoring
2.6	Insufficient consumer awareness for organic products; promotion of organic sector	Public communication and promotion (consumer information)	Information through media (social, tv, radio etc.); Promotional materials for organic agriculture and labels Organization of the national and international promotional events and fairs for organic production	Donor projects, MARD	Sector responsible for promotion in the MARD	Companies, AAM, Media, Donors, NGOs, Universities etc.	Organic Label and logo recognition and trust, Participation in the national and international event and fairs	MARD
2.7	Lack of local market	Strengthening the short supply chain	Increase public awareness about benefits of organic production; Cooperation with local agritourism operators and integration with their action plan	Donor projects	Private sector, agritourism's	Municipalities, media	Number of agritourism business using organic products. Action plan on agritourism adopted	MARD
2.8	Lack of knowledge and support for value chain	Value chain facilitation and capacity building	Promote membership in associations Increasing the knowledge and strengthening linkages between stakeholders' companies.	Donor projects	Private sector, associations	Donor projects	Establish of organic association Participation in training and events,	MARD
2.9	Limited visibility at international fairs	Export promotion	Participation in various international fairs for the recognition of Albanian organic products worldwide. Presentations and promotion.	AIDA, MARD	Private sector	Donor projects, AIDA, AAM	Participation in international fairs	MARD

Area 3: Legislation, Certification and policies

	Issue	Action line	Action description	Budget source	Lead responsibility	Support/ participation	Indicators	Monitoring
3.10	Further alignment of legislative framework with the acquis on organic production	Completion of the legislative framework on organic production	Development of the action plan on alignment with acquis on organic production Development and adoption of bylaws in the implementation of new law 104/2024.	Donor projects, MARD	MARD	Donor Projects,	The action plan on alignment with acquis on organic production is developed, Adoption of 15 bylaws alignment with the EU implementing and delegated regulation	MARD
3.11	Register of organic operators	Database on organic operators	Establishment of the register of organic operators by the control authorities (NFA and NAVPP)	Donor projects (Italian Project)	NFA, NAVPP, ARDA, RAAE	Donor projects	Register of organic operator is established and list of operators is published by NFA, NAVPP	MARD
3.12	Strengthening the institution framework and administrative capacities in the MARD, NFA and NAVPP for adoption and enforcement of new legislation	Strengthening the institution framework and administrative capacities	Reorganization of structure in the MARD, NFA and NAVPP Strengthening capacities for legislation enforcement and alignment with the acquis on organic production	MARD, NFA, NAVPP SWG, MARD Donor Projects (Italian project,	MARD, NFA, NAVPP	Donor projects MARD	Establish the certain unit or recruit additional experts to be engaged in organic production sector in the MARD, NFA and NAVPP The expert missions of Italian experts for drafting the organic bylaws, are organized.	MARD

	Issue	Action line	Action description	Budget source	Lead responsibility	Support/ participation	Indicators	Monitoring
3.13	Implementation and enforcement of organic legislation	Establishment of specific control rules and procedure	Establishment of the specific rules on control of import of organic products Control of market for fraudulent use of organic reference by non-certified food operators Enforcement of labelling rules	MARD NFA	MARD NFA	Donftors (TAIEX), NFA, bio. inspecta	Adoption of DCM on detailed import control rules Control procedure and checklist are established by NFA Number of controls performed in the market and findings and penalties reported in the MARD. Number of controls performed in the marked and non-compliances reported in the MARD.	MARD
3.14	Registration of CBs certifying according to the international standards (EU, NOP, Bio Suisse)	Procedure for registration of CBs	Development and adoption of DCM on further conditions and procedure for approval of CBs and registration of CBs for international standards Handling the applications for registration and organization of COP meetings	MARD	COP	MARD	Adoption of DCM on further conditions and procedure for approval and registration of CBs. Number of CBs registered. Number of meetings of COP organized	MARD

Area 4: Research, education, training and extension

	Issue	Action line	Action description	Budget source	Lead responsibility	Support/ participation	Indicators	Monitoring
4.15	Strengthening the administrative capacities of the public institutions for implementation and enforcement of new legislation	Capacity building	Dissemination campaign on the new organic legislation Strengthening the capacities for implementation and enforcement of new organic legislation	SWG, Donor Projects (Italian project, etc)	MARD, NFA, NAVPP	Donor projects, BTSF	Participation in the trainings on the new organic production legislation. The study visit in Italy on organic production is organized.	MARD
4.16	Lack of knowledge and information about the organic legislation by the RAAE	Training of trainers	Training of the staff of RAAE so they can disseminate the information to the farmers during their daily work	Donor projects	RAAE	Extension Service sector in the MARD	Participation of the RAAE staff in the trainings. Number of available trainers	MARD
4.17	Lack of local knowledge about organic practices by the organic farms	Organic applied research	Identify stakeholders' research priorities and needs. Support for research projects on organic agriculture.	Donors, Research projects, Universities	Research institutions and Agricultural University	Institutes, CIHEAM- Bari, IOA	Research priority plan Organic research completed; farm demonstrations are done	MARD
4.18	Capacity building & sector facilitation with international agencies	To strengthen cooperation with international agencies	To visit different European/ Regional countries involving private/public experts, and student exchanges.	Donors	Private sector	Donor projects, BTSF	Experience gained and collaborations established	MARD

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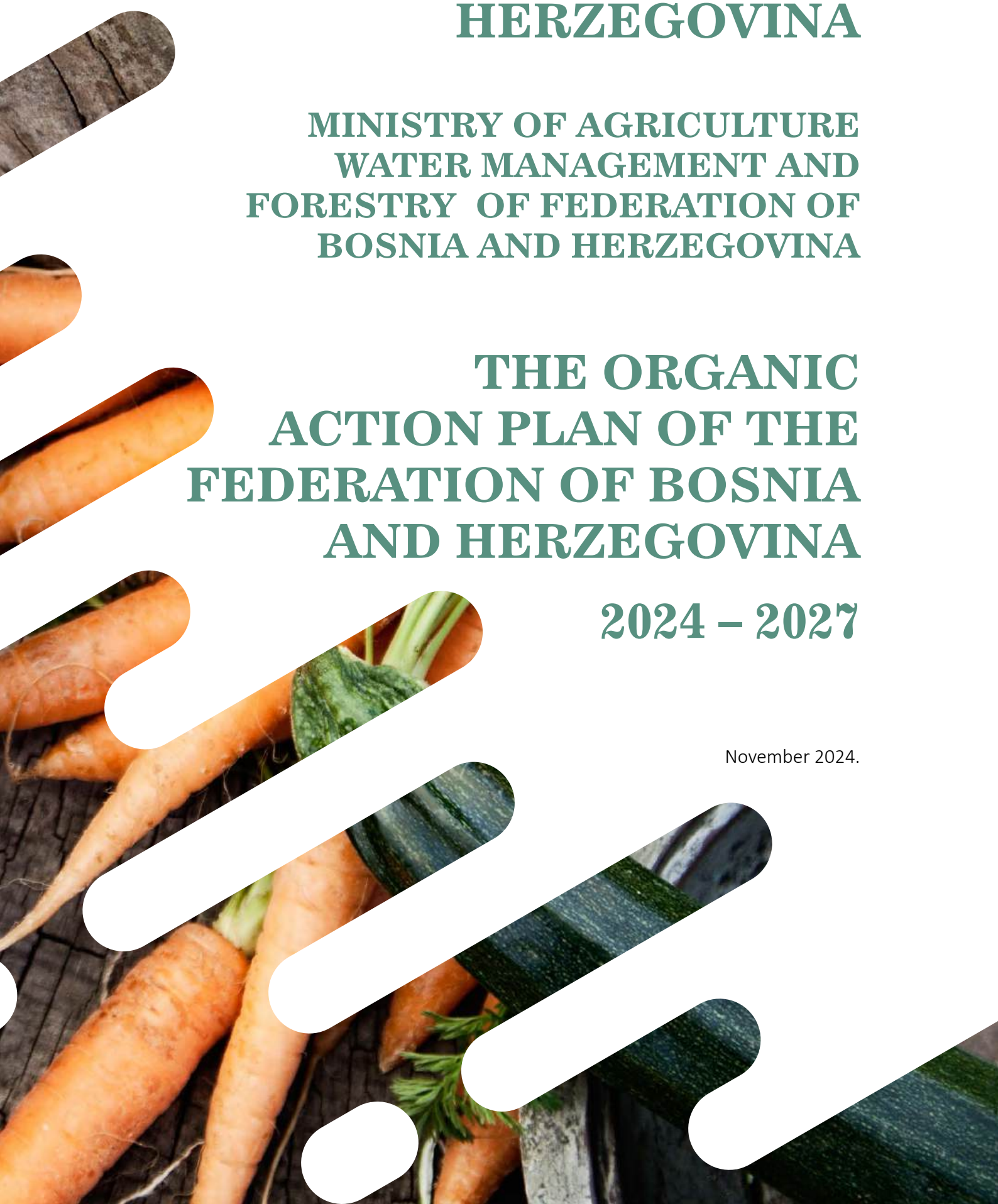
BOSNIA AND HERZEGOVINA

MINISTRY OF AGRICULTURE WATER MANAGEMENT AND FORESTRY OF FEDERATION OF BOSNIA AND HERZEGOVINA

THE ORGANIC ACTION PLAN OF THE FEDERATION OF BOSNIA AND HERZEGOVINA

2024 – 2027

November 2024.



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List of abbreviations

Abbreviation	Description
BHAS	Agency for Statistics of Bosnia and Herzegovina
BAM	Bosnia-Herzegovina Convertible Mark
BiH	Bosnia and Herzegovina
BD	Distrikt Brčko
EU	European Union
FAO	Food and Agriculture Organization of United Nations
FBiH	Federation of Bosnia and Herzegovina
FMAWMF	Ministry of Agriculture, Water Management and Forestry of the Federation of Bosnia and Herzegovina
GIZ	Gesellschaft für Internationale Zusammenarbeit (German Development Agency)
HOPS	Office for Harmonization and Coordination of Payment Systems in Agriculture, Food and Rural Development of Bosnia and Herzegovina
MOFTER	Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina
NGO	Non-governmental Organization
RS	Republika Srpska
RPG	Database of Registered Agricultural Holdings
SDG	Sustainable Development Goals
SME	Small and Medium Enterprises
SIDA	Swedish International Development Cooperation Agency
UNDP	United Nations Development Programme

Contextualization

Organic agriculture in Bosnia and Herzegovina (BiH) is still in the initial development phase. Previous research on consumer preferences and attitudes toward organic and sustainable products indicates that consumers in BiH are aware of problems related to the sustainability of the current food system, and health-related problems. Still, the purchase of organic products is limited mostly because of low production level and consumption of imported organic products (especially high-value-added organic products) (Cerjak et al., 2010; Renko and Vignali, 2010; Nikolić, et al. , 2014), , and that is visible from the following figure.

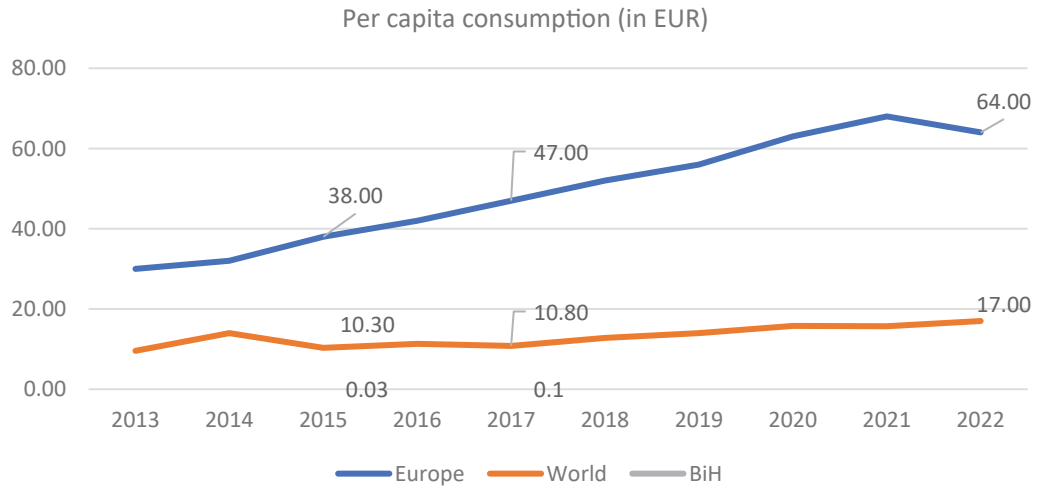


Figure 1. Organic products purchase in the World, Europe, and in Bosnia and Herzegovina (Willer & Lernaud, 2016; 2017; 2018; 2019; 2020; 2021; 2022; 2023; 2024)

Several studies have noted that consumers in BiH perceive organic and traditional/domestic products as the same and are therefore unwilling to pay a premium price (Cerjak et al., 2010; Renko and Vignali, 2010; Nikolić, et al., 2014). Lack of national legislation, but also the fact that promotional activities aimed at raising consumer awareness of organic agricultural products are limited to fairs and a very small number of TV/radio appearances. As a result, labeling schemes may lose their communication role as well as the role of building trust and customer loyalty. In general, organic production in BiH is diversified, in small quantities, the food chain of organic products is in the initial stages of development, and product sales are direct or in “green” markets, very often without an adequate premium price (Mujčinović, 2020). Organic products can be found in certain supermarkets and specialty organic stores, and an interesting indicator is that there is a significant development of online shopping for these groups of products. This data shows that producers have somewhat understood the development of this type of trade, which has significantly lower operating costs compared to traditional retail channels. The application of organic production and innovative business practices is necessary for the sector to make a breakthrough, evolve, and enable producers to generate higher levels of benefits, and thus improve business/business performance, business quality, and overall quality of life, especially in rural areas. In such conditions, the effects of public policies will be more pronounced, the overall utility will be increased, and a more innovative approach to business will be recognized as the only means to fight in the increasingly competitive market of agri-food products. According to official FiBL reports (Willer et al., 2024), 2495 hectares (ha) are used for organic production, which is still a very low percentage (0.1%) of the total arable land in BiH. According to the same source, 195.668 ha are used to collect wild plants, forest fruits, fruits, and mushrooms. According to data, there are 90

organic producers. Detailed statistics on the organic sector in Bosnia and Herzegovina are shown in Table 1.

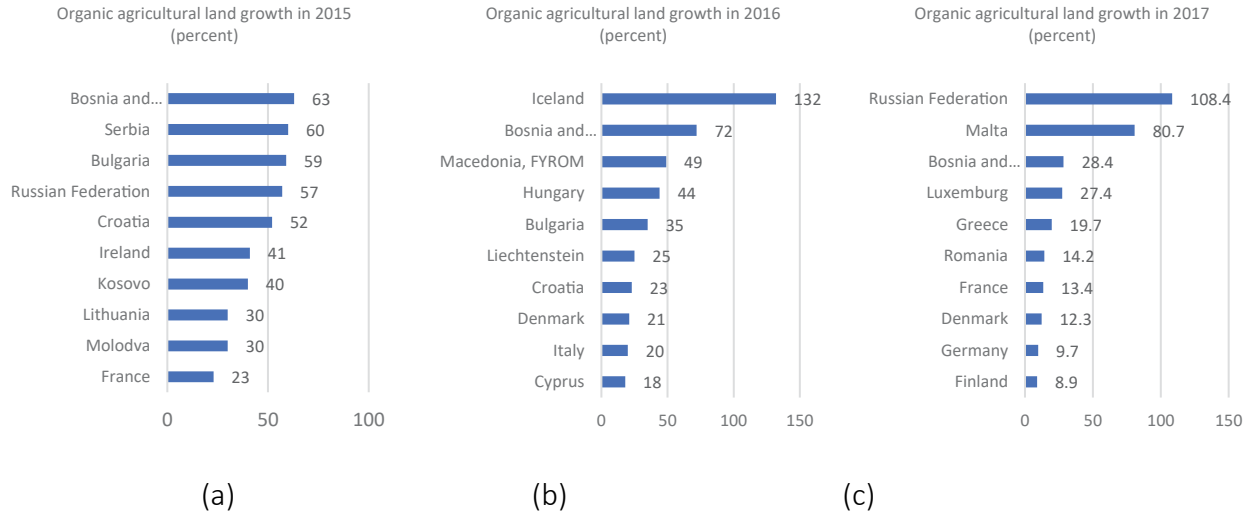
Table 1. Organic agriculture in BiH (Willer i Leround, 2011; 2012; 2013; 2014; 2015; 2016; 2017; 2018; 2019; Willer et al., 2020; 2021; 2022; 2023; 2024)

Godina	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	**Change 2013-2022 (%)**
Organic land (ha)*	691	691	580	580	343	343	292	353	576	992	1.273	896	1.692	1.692	2.495	2.495	**754**
Share in total arable land (%)	0,04	0,04	0,03	0,03	0,02	0,02	0,01	0,02	0,03	0,05	0,1	0,04	0,1	0,1	0,14	0,1	
No. of producers	n/a	n/a	27	27	25	25	24	24	36	45	304	251	251	86	90	90	**275**
No. of processors	n/a	n/a	27	27	12	12	8	8	8	17	31	23	23	51	51	51	**537**
No. of exporters	n/a	n/a	n/a	n/a	6	6	6	6	10	13	15	20	20	29	20	20	**233**
Value of export (mil EUR)	n/a	1	n/a	n/a	n/a	n/a	n/a	1	2	2	4	n/a	n/a	n/a	n/a	n/a	
Expenditures/inhabitants (EUR)	n/a	n/a	n/a	n/a	0,1	0,1	n/a	n/a	0,03	n/a	0,1	n/a	n/a	n/a	n/a	n/a	
Organic beehives	n/a	n/a	n/a	n/a	n/a	373	329	561	238	291	293	150	150	150	120	120	**(63)**
Wild herbs (ha)**	69.310	150.604	220.000	220.000	78.550	78.550	63.910	124.141	50.250	69.310	150.604	62.030	11.579	11.579	195.668	195.668	**206**

*including land in conversion

**total wild plants including berry fruits and mushrooms, but the dominant role of wild herbs (in 2017, out of a total 150.604ha, wild herbs collected on surface of 103.575 ha)

According to some estimates (GTZ, 2000; cited in USAID, 2010), about 100,000 people are engaged in collecting activity, thus, representing significant support in income for vulnerable categories, mostly in rural areas. From the previous table, there are signs that the total area under organic agriculture is increasing, and based on the following figures, Bosnia and Herzegovina in the past few years achieved significant improvements, but still total amount of land is low (Figure 2).



(a) (b) (c)

Figure 2. Growth of organic agricultural land in 2015 (a), 2016 (b), 2017 (c)

Underdeveloped and inefficient support systems for agricultural production (almost nonexistent in the sector of organic agriculture) remain a major problem for the further development of the sector. Without clearly defined development goals and elements of modern public policies based on facts, monitoring, and evaluation, the sector cannot achieve significant growth and development (Martinovska Stojcheska et al., 2021; Bajramović et al., 2006; 2014; 2016). In this sector, as in other sectors, measures of direct support to producers dominate (Figure 3), which are distortive and should be reduced over time (Mujčinović et al., 2018; 2021).

Figure 3. Budgetary support in medicinal and aromatic plant sector and organic agriculture (in mill BAM) (HOPS, 2020)

The total amount of money allocated to support organic agriculture is low and should be increased rapidly to facilitate the sector's development (MoFTER, 2018). Also, the diversity of the measures should be considered to improve the overall stability of that specific part of the value chain. At the

level of Bosnia and Herzegovina, there are no regulations for organic production. Entity ministries of agriculture have adopted or are in the process of adopting laws and bylaws for organic production, while the Brcko District of BiH has not regulated this area. An overview of organic legislation in FBiH is provided in the next table.

Table 2. Organic legislation in the Federation of Bosnia and Herzegovina

FBiH	
Zakon o poljoprivrednoj organskoj proizvodnji („Službene novine FBiH“, broj 72/16	Law on Agricultural Organic Production is in force
Pravilnik za organsku biljnu i stočarsku proizvodnju („Službene novine FBiH“, broj 14/18)	Rulebook for organic plant and livestock production

Previously, certification bodies that were operating in BiH are recognized by the EU, and are listed in Annex IV of Regulation 1235/2008. For Bosnia and Herzegovina, these are: “Agreco R.F. Göderz GmbH”, Witzenhausen, Germany; “Albinspekt” ‘Rr. Kavajes’, Tirana, Albania; “Bio.inspecta AG”, Ackerstrasse, 5070, Frick, Switzerland; “Ecocert SA” “IMOswiss AG”, Switzerland (Ecocert Balkan d.o.o. Zemun - Serbia); “LACON GmbH”, Offenburg, Germany; “ORSER”, Cankaya-Ankara-Turkey; “Organic Control System”, Subotica, Serbia; “Organska kontrola”, Kranjčevićeva 15, 71 000 Sarajevo, Bosnia and Herzegovina; “Control Union Certifications”, Zwolle, The Netherlands; “DQS Polska sp. Z o.o.” Poland; “Ecogruppo Italia”, Catania, Italy, but with the new Law on organic agriculture (EU) No 2018/848 recognition of such bodies is set to expire by 31/12/2024. This amendment sets the list of control authorities and control bodies recognized to certify operators and groups of operators in non-EUthird countries, compliant with the new EU legislative framework on organics currently in force, to import organic products into the EU.

Regulation (EU) 2018/848 establishes the principles of organic production and lays down the rules concerning organic production (Figure 3), related certification, and the use of indications referring to organic production in labeling and advertising, as well as rules on controls additional to those laid down in Regulation (EU) 2017/625.

The rules reflect the changing nature of this rapidly growing sector. The new regulation is designed to ensure fair competition for farmers whilst preventing fraud and maintaining consumer trust through the following (EU, 2021):

Production rules are simplified through the phasing out of a number of exceptions and opt-outs;

The control system is strengthened thanks to tighter precautionary measures and robust checks along the entire supply chain;

Producers in third countries will have to comply with the same set of rules as those produced in the EU;

Organic rules cover a wider list of products (e.g. salts, cork, beeswax, wool, etc) and have additional production rules (e.g. deer, rabbits, and poultry);

Certification will be easier for small farmers thanks to a new system of group certification;

There will be a more uniform approach to reducing the risk of accidental contamination from pesticides.

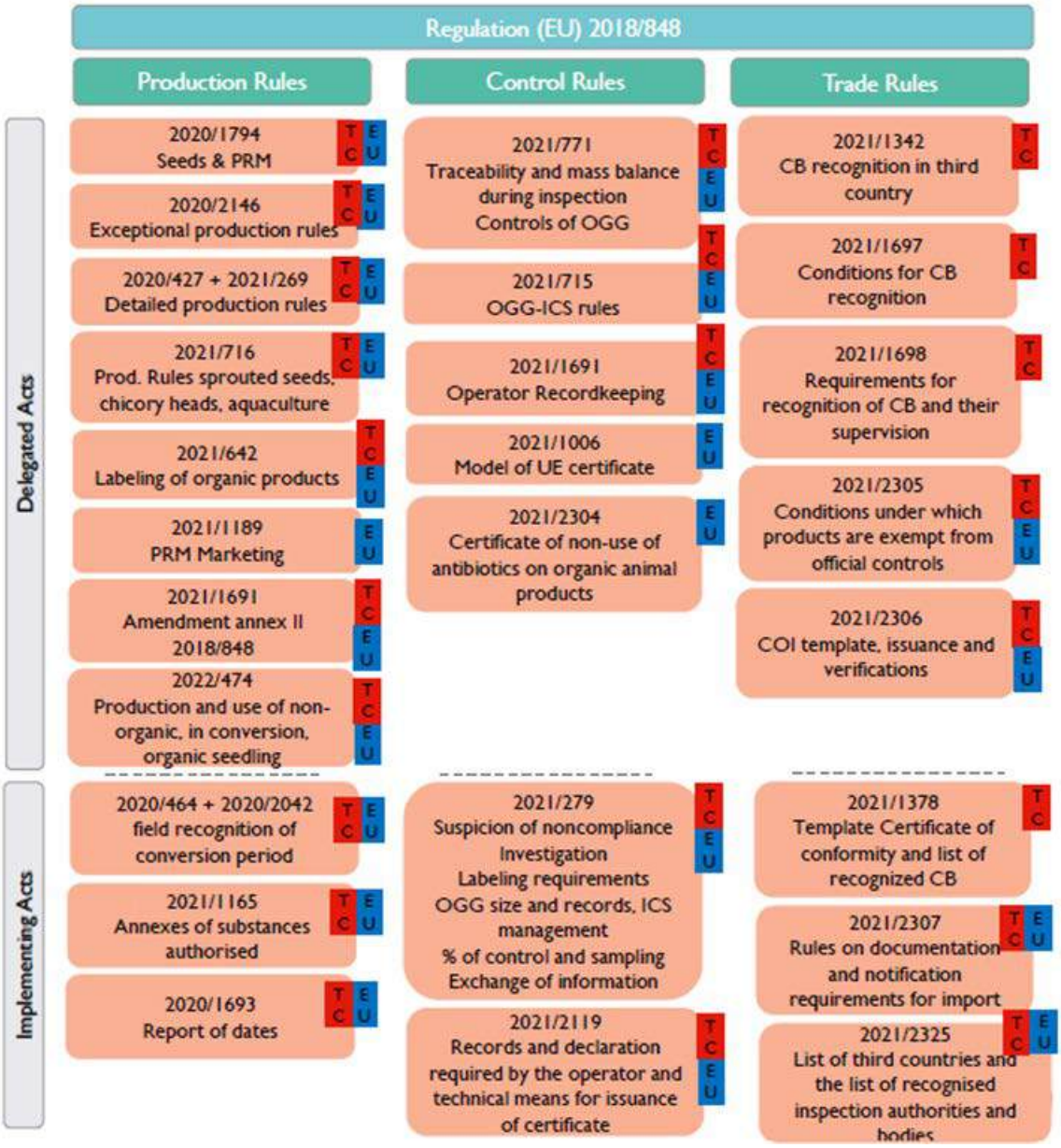


Figure 4. Overview of organic legislation (EU, 2024)

SETTING UP PRIORITIES FOR ORGANIC AGRICULTURE DEVELOPMENT

Priorities for organic agriculture development in the Federation of Bosnia and Herzegovina were built and aligned with goals and objectives of:

Strategy for agriculture and rural development of Federation of Bosnia and Herzegovina for period 2021 – 2027 (Strategija poljoprivrede i ruralnog razvoja Federacije Bosne i Hercegovine za period 2021. – 2027. godina) (FMAWMF, 2022); (Measure 1.1.1. Support to agricultural farms in less favored areas; Measure 1.1.3. Support for organic and in-conversion production; Measure 3.1.5. Support for exchange of knowledge and information; Measure 4.1.1. Technical assistance to the Federal Ministry of Agriculture, Water Management and Forestry for implementation of policies and strengthening food safety system;

Action Plan for the development of EU organic production, and

Strategic Guiding Document, How to develop the organic sector in the West Balkan Region and Moldova from 2024-27 (Action area Production and Processing, Market Development, Regulations, Certification and Control, Policies, Research, Education, Training, Extension Services, and Cross-Cutting Action Areas).

Proposed priorities with possible actions are presented in the next table, and all aim to stimulate both the supply and demand side, creating an attractive environment for farmers, especially young farmers, and women, stipulating technical and technological advancements among the farmers while promoting protection and preservation of nature. It should be noted, that initial momentum for organic agriculture development in the Federation of Bosnia and Herzegovina was almost lost, and even though organic agriculture is recognized as a viable source and potential market niche for agricultural producers, still incentives are low. Proposed actions aim to address such problems holistically, by providing „a backbone“ for producers, by offering different funding mechanisms from one side, as well as incentivizing demand for organic agriculture with a wide range of activities that are aiming to engage consumers in responsible consumption.

Table 3. List of the priorities and activities to support organic agriculture development in FBiH

Value chain - PRODUCTION, PROCESSING, MARKETING OF ORGANIC PRODUCTS	Quality assurance - REGULATION, CERTIFICATION AND CONTROL/MONITORING	Support activities – RESEARCH & INNOVATION, EDUCATION, TRAINING, ADVISORY SERVICES
Financial and technical support to producers, support in transition, support in establishing own planting and seed material.	Harmonization and implementation of the EU legislative framework.	Support for conducting research to innovate in organic production, increasing productivity, etc.
Integrating organic production into a wider context, the role of other Ministries (eg environment- development of agroecological measures, entrepreneurship, economy, education).	Strengthening the work of inspection bodies; and training for stakeholders in the sector.	Support for the development of non-cyclical learning programs and micro-credentials in the field of organic production, certification procedures, and marketing strategies.
Support for young producers and women in establishing organic production.	Involvement of decision-makers in the development and implementation of policies that support the development of the organic sector, certification, labeling as well as financial initiatives.	Support for advisory services to participate in various educational programs.
Support for the preservation/ protection of genetic material and protection/strengthening of biodiversity.	Support for networking and association (group certification) of small producers (with special emphasis on youth and women).	Support for the development of short courses on organic agriculture, intended for young people.
Promotion of organic products through various campaigns that include: innovation competitions, new forms of fairs.	Support for the establishment of coordination mechanisms in the sector. Support in development of necessary registers for effective monitoring and evaluation.	Support for organic competitions, hackathons, “organic” academies, summer and winter schools.

PRODUCTION, PROCESSING, MARKETING OF ORGANIC PRODUCTS

Existing support for organic agriculture development is seen ***as very narrow and homogenous***, where some financial incentives are provided by the agricultural ministries, while this action plan foresees a ***multifaceted approach*** that addresses various challenges that agricultural producers, processors, distributors, but also consumers and all other actors involved are facing, such as technology, knowledge, financial resources, and market opportunities. To reinforce sector and stimulate organic agriculture development in the Federation of Bosnia and Herzegovina it is necessary to provide financial incentives, technical support, technological innovation, knowledge transfer, support for young farmers and women in agriculture, and preservation of genetic material. ***Financial technical and technological support*** can be provided in terms of subsidies for organic inputs and technology (organic-certified seeds, fertilizers, and pest control methods, support to cover the cost of certification, especially during the conversion period, subsidies for eco-friendly technologies i.e. drip irrigation system, solar-powered systems, greenhouses, etc.). Support to ***training programs, the establishment of educational platforms and hubs*** to stimulate knowledge exchange in terms of organic farming practices, sustainable land management, pest control, soil health, certification processes, and market and marketing of organic products. Financial incentives can be provided to farmers that are part of ***mentorship or knowledge-sharing programs***. Initiate ***gender-targeted financial support***, gender-sensitive training and education, cooperative programs to support networking, and group certification (achieving economy of scale). To further raise awareness about organic agriculture and associated benefits (nature, society, economy) ***support for competitions, hackathons, and summer/winter schools*** should be provided, to promote organic agriculture, foster innovation, and engage diverse groups such as young people, farmers, entrepreneurs, and researchers. Such initiatives are focused on building a community of dedicated, passionate, and skilled organic producers, entrepreneurs, and innovators.

By providing these financial incentives across various levels—technological, educational, social, and market-based—governments and private sectors can create a more sustainable and inclusive organic agriculture industry. These measures will help to foster innovation, preserve biodiversity, and empower the next generation of organic farmers, including women and young people.

Regulation, certification and control/monitoring

Currently, ***harmonization is slow and non-efficient***, a ***more agile approach is needed***. Support should be provided for ***capacity building, institutional and administrative support, and public awareness campaigns*** to raise awareness among government representatives and engage different stakeholders and civil society (special focus on engagement between business and industry groups). Additionally, support should be provided for ***comprehensive gap analysis*** i.e. to provide a comprehensive assessment of the gaps between national and EU legislation in place. Necessary registers should be developed and in place for effective monitoring and evaluation and a fact-based decision-making process.

Research, education, training, advisory services

Currently, research, education, training, and support of advisory services ***are limited or non-existent***. Research, education, training, and advisory services play a crucial role in developing organic agriculture by providing farmers with the knowledge, skills, and resources needed to adopt and sustain organic farming practices. Support should be provided to ***investigate sustainable farming practices*** that improve soil health, pest management, crop rotation, and organic inputs application. This will help develop cost-effective business models tailored to the needs of farmers in BiH. Support the development of ***university programs in organic agriculture*** and open educational materials (i.e. Massive Open Online Courses), webinars, and video tutorials, to make educational materials more accessible to a wide audience, especially young farmers in rural areas. ***Initiate farmer-to-farmer training programs*** to foster peer-to-peer learning, helping to understand the challenges and practical aspects of organic farming. Strengthen advisory services by supporting the ***establishment of local organic agriculture advisory centers/hubs/groups – demonstration farms***, and provide financial and technical support. Stipulate quadruple helix partnership and cross-sector collaboration to co-develop solutions for improving organic farming technologies, market access, and sustainability. Such an approach should result in wider adaptation of organic farming, improve business performances, and ensure competitive advantage for involved actors.

Timetable for implementation of proposed activities

Activities	2025				2026				2027				2028				Responsible institution(s)
	I	II	III	IV	I	II	III	IV	I	II	III	IV	I	II	III	IV	
PRODUCTION, PROCESSING, MARKETING OF ORGANIC PRODUCTS																	
Financial and technical support to organic, in-conversion producers																	
Subsidies for organic agriculture																	Ministry of Agriculture, Water Management and Forestry of FBiH
Subsidies for less favored areas																	Ministry of Agriculture, Water Management and Forestry of FBiH
Subsidies for organic inputs and technology (organic-certified seeds, fertilizers, pest control methods)																	Ministry of Agriculture, Water Management and Forestry of FBiH
Subsidies for certification costs																	Ministry of Agriculture, Water Management and Forestry of FBiH
Subsidies for eco-friendly technologies (i.e. drip irrigation systems, solar-powered systems, greenhouses) innovations and modernization																	Ministry of Agriculture, Water Management and Forestry of FBiH
Technical support – organic farming, sustainable land management, pest control, soil health, market and marketing of organic products – predictive models (starting digitalization of agriculture and introduction of first step towards smart agriculture)																	Ministry of Agriculture, Water Management and Forestry of FBiH
Introduction of agroecological measures																	Fond za zaštitu okoliša Environmental Fund of the FBiH

Activities	2025				2026				2027				2028				Responsible institution(s)
	I	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	
PRODUCTION, PROCESSING, MARKETING OF ORGANIC PRODUCTS																	
Financial and technical support in establishing own planting and seed material																	
Technical support – organic nurseries and e-network for seed production (registration)																	Ministry of Agriculture, Water Management and Forestry of FBiH
Subsidies for plant nurseries - organic nurseries and e-network for seed production (registration)																	Ministry of Agriculture, Water Management and Forestry of FBiH
Integrating organic production into a wider context, the role of other Ministries (eg environment - development of agroecological measures, entrepreneurship, economy, education).																	
Development of agroecological measures/ program																	Fond za zaštitu okoliša u saradnji sa ostalim akterima Environmental Fund of the FBiH with other stakeholders
Development of entrepreneurship programs for agro-ecological incentives																	Federalno ministarstvo razvoja, poduzetništva I obrta, sektor poduzetništva u saradnji sa ostalim akterima Ministry of Development, Entrepreneurship and Crafts of the FBiH with other stakeholders

Activities	2025				2026				2027				2028				Responsible institution(s)
	I	II	III	IV	I	II	III	IV	I	II	III	IV	I	II	III	IV	
PRODUCTION, PROCESSING, MARKETING OF ORGANIC PRODUCTS																	
Support for young producers and women in establishing organic production.																	
Support for young farmers																	Ministry of Agriculture, Water Management and Forestry of FBiH
Support for women in organic agriculture (introduction of gender-targeted financial support)																	Ministry of Agriculture, Water Management and Forestry of FBiH
Support for the preservation of genetic material.																	
Support for preservation of genetic material																	Ministry of Agriculture, Water Management and Forestry of FBiH
Promotion of organic products through various campaigns that include: innovation competitions, new forms of fairs, “organic” academies, summer and winter schools, etc.																	
Support for the organization of international organic fairs																	Ministry of Agriculture, Water Management and Forestry of FBiH with other responsible ministries (i.e. Education, Economy)
Support for the organization of organic competitions/ hackathons																	Ministry of Agriculture, Water Management and Forestry of FBiH with other responsible ministries (i.e. Education, Economy)

Activities	2025				2026				2027				2028				Responsible institution(s)
	I	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	
PRODUCTION, PROCESSING, MARKETING OF ORGANIC PRODUCTS																	
Support for the organization of summer/winter schools																	Ministry of Agriculture, Water Management and Forestry of FBiH with other responsible ministries (i.e. Education, Economy)
REGULATION, CERTIFICATION AND CONTROL/MONITORING																	
Harmonization and implementation of the EU legislative framework.																	
Harmonization of Law on Organic Agriculture																	Ministry of Agriculture, Water Management and Forestry of FBiH
Development of register (organic farm register, inputs, nurseries, etc.)																	Ministry of Agriculture, Water Management and Forestry of FBiH
Support for comprehensive gap analysis between national and EU legislation in organic agriculture																	Ministry of Agriculture, Water Management and Forestry of FBiH
Harmonization/development of secondary legislation																	Ministry of Agriculture, Water Management and Forestry of FBiH
Strengthening the work of inspection bodies and training for stakeholders in the sector.																	
Support for the organization of training for government representatives																	Ministry of Agriculture, Water Management and Forestry of FBiH

Activities	2025				2026				2027				2028				Responsible institution(s)
	I	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	
PRODUCTION, PROCESSING, MARKETING OF ORGANIC PRODUCTS																	
Financial support for technological advancements for official control bodies																	Ministry of Agriculture, Water Management and Forestry of FBiH
Support for networking and association (group certification) of small producers (with special emphasis on youth and women).																	
Technical support for the development of organic associations and group certification																	Ministry of Agriculture, Water Management and Forestry of FBiH
Financial support for running an organic association (under the group of certification)																	Ministry of Agriculture, Water Management and Forestry of FBiH
Support for the establishment of coordination mechanisms in the sector (i.e. AKIS).																	Ministry of Agriculture, Water Management and Forestry of FBiH
RESEARCH, EDUCATION, TRAINING, ADVISORY SERVICES																	
Support for researching to innovate in organic production, increasing productivity, etc.																	
Financial support for the establishment of research hubs/lighthouses, research and development of new ideas																	Ministry of Agriculture, Water Management and Forestry of FBiH
Support for the organization of public presentation of research results																	Ministry of Agriculture, Water Management and Forestry of FBiH

Activities	2025				2026				2027				2028				Responsible institution(s)
	I	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	**I**	**II**	**III**	**IV**	
PRODUCTION, PROCESSING, MARKETING OF ORGANIC PRODUCTS																	
Support for the development of non-cyclical learning programs and micro-credentials in the field of organic production, certification procedures, and marketing strategies.																	
Financial support for the development of an online platform for the exchange of information in organic and sustainable agriculture																	Ministry of Agriculture, Water Management and Forestry of FBiH
Financial support for the development of learning materials and micro-credentials																	Ministry of Agriculture, Water Management and Forestry of FBiH
Financial support for the development of short courses for young people and farmers																	Ministry of Agriculture, Water Management and Forestry of FBiH
Initiate a farmer-to-farmer training program																	
Support for advisory services to participate in various educational programs.																	
Support for selected advisors to participate in training																	Ministry of Agriculture, Water Management and Forestry of FBiH
Initiate advisor-to-advisory training program																	Ministry of Agriculture, Water Management and Forestry of FBiH
Support the establishment of an organic agriculture advisory center																	Ministry of Agriculture, Water Management and Forestry of FBiH
Annual evaluation and recommendation for development																	Ministry of Agriculture, Water Management and Forestry of FBiH

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MINISTRY OF AGRICULTURE FORESTRY AND WATER MANAGEMENT OF REPUBLIKA SRPSKA

THE ORGANIC ACTION PLAN OF THE REPUBLIKA SRPSKA

2024 – 2027

November 2024.

Content

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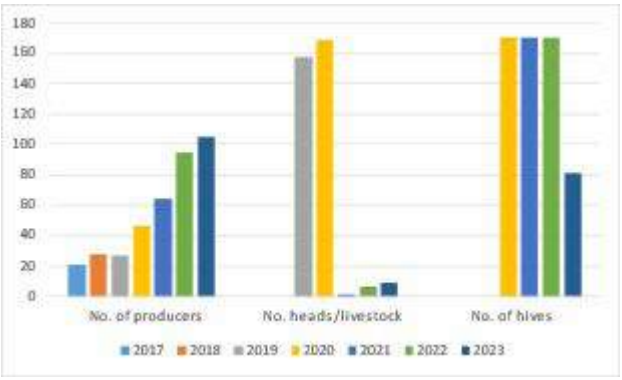
1. Current State of Organic Agriculture in the Republic of Srpska

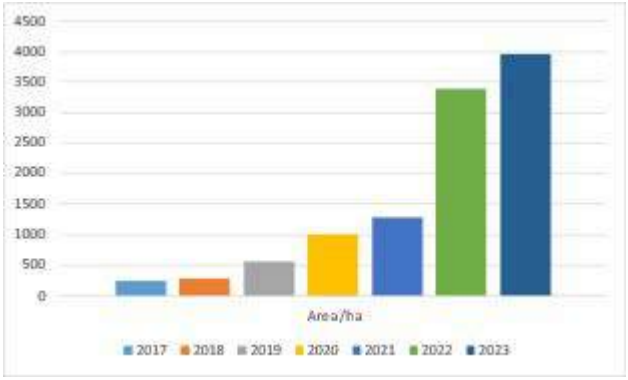
Agricultural production in the Republic of Srpska is characterized by small plot sizes, a high reliance on manual labor, ongoing rural depopulation, a lack of specialized machinery, slow innovation adoption, and insufficient producer knowledge. These challenges make production costly and uncompetitive, particularly in the organic agriculture sector. Opportunities for improvement lie in introducing new (innovative) technologies, which should be seen as tools for changing production methods and implementing agroecological measures.

Changes should be made through a farm-based production system with a balanced relationship between livestock and crop production, adapted to various vegetable production methods. The future of agriculture lies in sustainable ecological systems that produce high-quality, safe, and diverse food while rationally using natural resources and protecting biodiversity. Introducing innovations in agricultural production provides the best foundation for developing agriculture under climate change conditions. Additionally, significant areas of unused land could be easily converted into arable land with a shortened conversion period.

According to data from the Ministry of Agriculture, Forestry, and Water Management of the Republic of Srpska (MAFWM RS), there has been a continuous growth trend in the organic production system. Registered areas under organic production increased from 238 hectares in 2017 to 282 hectares in 2018, reaching 1,276 hectares in 2021 and approximately 4,000 hectares by the end of 2023. Despite this growth, these areas remain very small and insufficient compared to the total available arable land (0.01% of total arable areas). In 2019, 158 livestock were recorded under organic production, increasing to 1,508 in 2021 and slightly under 9,500, including donkeys and bee colonies.

The state of organic production in the Republic of Srpska (2017-2027)





* data source MAFWM RS (2024)

The first legal regulation of organic agriculture in Bosnia and Herzegovina was established in 2004 by adopting the Law on Organic Food Production in the Republic of Srpska ("Official Gazette of the Republic of Srpska," No. 75/04). This law was based on EU Regulation No. 2092/91. Minor amendments to this law were made in 2009 and published in the "Official Gazette of the Republic of Srpska," No. 71/09. However, the bylaws adopted under this law were insufficient, and their implementation in practice yielded very modest results in developing the organic sector in the Republic of Srpska.

Following the repeal of EU Regulation No. 2092/91 and the adoption of the new EU Council Regulation No. 834/2007 on organic production and labelling of organic products, it became necessary

to adopt a new Law on Organic Production to harmonise further the organic production system in the Republic of Srpska. Consequently 2013, a new Law on Organic Production was enacted ("Official Gazette of the Republic of Srpska," No. 12/13). The law and its bylaws were aligned with the relevant EU directives, including 834/2007, 178/2002, 882/2004, 889/2008, 1235/2008, 1169/2011, and 848/2020. The following bylaws were adopted:

1. Rulebook on Methods of Organic Plant and Livestock Production and Conversion Period ("Official Gazette of the Republic of Srpska," No. 57/15);
2. Rulebook on Technological Processing Procedures in Organic Production ("Official Gazette of the Republic of Srpska," No. 39/16);
3. Rulebook on the Conditions for the Work of Control Organizations and the Manner of Performing Control in the Procedure of Organic Production ("Official Gazette of the Republic of Srpska," No. 77/16);
4. Rulebook on the Content, Form, and Manner of Keeping Records in Organic Production ("Official Gazette of the Republic of Srpska," No. 77/16);
5. Rulebook on Conditions and Manner of Storage, Transport, and Placing on the Market of Organic Products ("Official Gazette of the Republic of Srpska," No. 67/18);
6. Rulebook on the Procedure for Issuing a Certificate for Imported Organic Products ("Official Gazette of the Republic of Srpska," No. 24/20);
7. Rulebook on Labeling of Organic Products ("Official Gazette of the Republic of Srpska," No. 93/20).

Adopting this law and its accompanying bylaws created the legal conditions for the sustainable development of organic production, ensuring the efficient functioning of the market, protecting market competitiveness, building consumer trust, and safeguarding their interests.

However, uncertified products often appear on the market, claiming to be organic. To address this issue, the adoption of the organic product logo of the Republic of Srpska has helped eliminate such ambiguities and ensured that organic products are recognised on the market. Certified domestic organic products are labelled with the entity logo of the Republic of Srpska and the code of the authorized control organization that conducted the inspection and certification of organic production.

Regarding the labelling of organic products at points of sale, retail outlets—whether wholesale or retail—selling organic products must have marked areas separate from other products. The same applies to markets where organic products are not mixed with conventional ones. A visible sign, poster, or sticker indicating the organic product must be prominently displayed in retail stores.

Sign for Organic Products and Conversion Period Products of the Republic of Srpska (Rulebook on Labeling Organic Products, 2020)

In the Republic of Srpska, the Ministry of Agriculture, Forestry, and Water Management, through the Agricultural Payments Agency, annually provides support measures based on the Rulebook on Conditions and Methods for Obtaining Financial Incentives for Agriculture and Rural Development.

According to this Rulebook for 2024, the minimum area eligible for a premium for organic plant production and production during the conversion period is 0.1 ha for fruit and vegetable crops, 100 m² in protected areas, and 0.25 ha for field crops. The premium amounts for organic plant production and production during the conversion period are 600 BAM/ha for field crops, 700 BAM/ha for fruit and vegetable crops, and 300 BAM per 100 m² for vegetable crops in protected areas. Regarding premiums for organic livestock production, including organic beekeeping, the premium amounts to up to 500 BAM per livestock unit or 20 BAM per beehive. The maximum premium one user can receive in a single year for this type of incentive is 40,000 BAM. Additionally, under the same Rulebook, producers can receive financial support covering 50% of certification costs.

Other institutions involved in organic production in the Republic of Srpska include the Faculty of Agriculture, University of Banja Luka; the Agricultural Institute of the Republic of Srpska, a scientific research institute; and the Republic Administration for Inspection Affairs, which, in cooperation with the Ministry of Agriculture, Forestry, and Water Management, is responsible for supervision and control in the organic production sector, as well as local governments that support and develop organic production within their territories. For control and certification activities under the Law on Organic Production, the Ministry of Agriculture, Forestry, and Water Management has authorized two control organisations:

- Organic Control System (OCS) – Subotica, branch in Laktaši, and
- Organic Control (OK) – Sarajevo, branch in East Sarajevo.

It should be noted that within the territory of the Republic of Srpska, control organisations are operating without authorization from the Ministry of Agriculture, Forestry, and Water Management of the Republic of Srpska but are authorised to operate in Bosnia and Herzegovina by the European Commission. However, these organizations do not have registered headquarters in the Republic of Srpska or Bosnia and Herzegovina.

The Ministry of Agriculture, Forestry, and Water Management of the Republic of Srpska has incorporated specific training and education into its activity plans. In recent years, training has been organized for producers, consumers, media representatives, markets/stores selling food and cosmetic products, specialized shops selling domestic and organic products, and advisors. Additionally, a guide for producers (How to Become an Organic Producer – First Steps) has been prepared for those interested in entering the organic production system, along with a guide for consumers to help them easily recognize organic products on the market. Within the Ministry of Agriculture, Forestry, and Water Management of the Republic of Srpska, a group of advisors has been established under the Department for Providing Expert Services in Agriculture in all regional units of Srpska. These advisors undergo training to assist potential and existing organic producers and provide adequate advice. Regarding promoting organic production, it is worth noting that the Ministry, in cooperation with the Chamber of Commerce of the Republic of Srpska, has provided space in recent years at fairs attended by businesses from the Republic of Srpska for a group of organic producers to showcase their products. This initiative has enabled organic producers from the Republic of Srpska to participate in fairs in Novi Sad, Belgrade, Subotica, Bijeljina, Mostar, and Rimini, Italy.

Additionally, for the past four years, the Ministry has organized the “Organic Production Day of Srpska,” an event that gathers organic producers, producers in the conversion period, those interested in joining the organic production system, institutional representatives, local communities, control organizations, and international guests. This event rotates locations each year at a different producer’s site. The Ministry also organizes the “Organic Fest of Srpska,” aimed at promoting certified organic

products from the Republic of Srpska. Although the festival primarily focuses on local producers, it also features limited participation from regional guests (from Serbia and Croatia) and producers from the other entity of Bosnia and Herzegovina.

2. Strategic Goals for the Development of Organic Agriculture in the Republic of Srpska

The primary objective for developing the organic agriculture sector in the Republic of Srpska is to increase the number of organic farms and the area under organic production, thereby enhancing the availability of organic products intended for the market. The main focus will be on expanding the scope of organic production while improving soil fertility, protecting the environment, conserving natural resources, and increasing biodiversity on organic farms. This approach will boost the economic efficiency, innovation, and market orientation of organic farms while ensuring the adoption of practices adapted to climate change.

An effective support policy for organic agriculture will also be introduced, including a high-quality education system and advisory services to meet the needs of producers and the organic sector. More funding will be allocated to research in organic agriculture, focusing on addressing specific challenges and developing new technologies and practices, ensuring that farmers are informed about research findings. To support this effort, demonstration farms will be established to play a promotional role and facilitate the transfer of knowledge and innovation into practice. The aim is to integrate content related to organic agriculture into all levels of the education system and to provide a study program in organic agriculture at the undergraduate and postgraduate levels. There is a growing trend of young people viewing organic agriculture as a unique opportunity which will create new green jobs and contribute to the vitality of rural areas. Plans include strengthening the integration of organic farmers into cooperatives or producer groups based on fair relationships throughout the supply chain. Moreover, efforts will be made to ensure quality and traceability for consumers. An increase in the availability and quantity of domestic organic products (food) on the market is expected, including in retail chains, gastronomy, and tourism. Achieving the goals of the organic sector development strategy in the Republic of Srpska will enable the introduction of domestic organic products in public institutions, ensuring healthier nutrition for consumers, especially children and young people. Annual promotional campaigns with a recognizable slogan will raise awareness and attract domestic consumers, emphasizing the significance of organic agriculture for human health, environmental protection, and improving the quality of life. Consequently, domestic consumers will become the most reliable buyers of local organic products.

The key strategic goals for the development of organic agriculture by 2027 are:

GENERAL OBJECTIVES	SPECIFIC GOALS
Increase the role of organic agriculture within agricultural policies- Increase organic production and processing	• Increase the share of funds from the budget to support organic agriculture by 10% by 2027. • Introduce a special program to encourage organic products. • Reach at least 1% share of organic farms. • Increase the extent or share of organic fields, gardens, orchards, vineyards and olive groves. • Increase the volume or share of organic agricultural land in water protection zones and in protected areas.
Strengthening the domestic organic production market- market development and promotion	• Increase the share of local organic food on the market. • Increase the share of organic products (especially domestic) in public institutions. • Strengthening the knowledge, skills and innovation of organic farmers. • Upgrade the system of promotional/consulting services for organic agriculture. • Increase the number of cooperatives and producer associations that buy organic food from domestic farmers • Organize an annual fair of organic products. • Create a guide for consumers on organic food.
Regulate the legislative framework (legislation, certification and policies)	• Enact laws and by-laws that regulate the area • Inclusion of organic production in national and local strategic documents • Establish a concept to ensure the prohibition of the use of GMOs in organic production • Establish a concept for the sustainable collection of natural resources. • Establish policies for the involvement of all stakeholders related to the implementation of the NOAP.
Strengthening the knowledge, skills and innovation of organic farmers	• Train 100 organic producers on new organic production techniques by the end of 2027. • Finance 2 pilot projects for the development of new organic products. • Increase funds for research and development of new technologies and provide more research projects to solve the challenges of organic agriculture. • Increase the production of certified organic seeds (especially arable and vegetable varieties).

Monitoring and Evaluation of Goals and Measures

The Working Group for Organic Agriculture, appointed by the Ministry of Agriculture, Forestry, and Water Management of the Government of the Republic of Srpska, will prepare a report every two years on monitoring the implementation of specific goals and measures outlined in the NOAP (National Organic Agriculture Plan). The report will be published on the Ministry's official website.

3. Identification of Needs, Goals, and Actions for Priority Strategic Goals

3.1. Increase Organic Production and Processing.

This goal will be achieved by improving organic and agricultural processing practices, expanding the area under crops in the organic production system, and increasing processing capacity to meet the growing consumer demand for organic products. Key starting points and challenges in achieving this strategic goal:

- Different microclimatic and pedological conditions that require and enable diverse production;
- Lack of knowledge, poor transfer of knowledge into practice, and underdeveloped new production technologies;
- Traditional knowledge and agricultural practices (mountain farming, pesticide-free…), indigenous and traditional plant varieties and animal breeds;
- Lack of an up-to-date database on products approved for use in organic production, limited phytopharmaceutical products, higher costs and smaller selection of agricultural equipment;
- Insufficient (market) production and processing, especially of fruits and vegetables;
- Issues with processing organic meat and meat products;
- Slow growth of organic agriculture;
- Insufficient number of farms transitioning to organic farming;
- No clear, comprehensive national strategy on organic agriculture, with the country not keeping pace with development trends in organic farming.

	Necessary	Action	Source of funds	Carrier	Indicator	Monitoring
1	Availability of necessary and appropriate inputs for production and processing	Subsidies for inputs for organic production (seeds, biopesticides, organic fertilizers, pheromones, predators, etc.)	Agrarian budget, donors, projects	MAFWM	Share of subsidies for organic production in the total budget (%); Number of supported manufacturers;	MAFWM
2	Financial and technical support to producers to adopt technologies and practices	Subsidies for new technological solutions in organic production.	Agrarian budget, donors, projects	MAFWM AAP FA AIRS projects	The percentage of increase in yield for subjects where new solutions have been applied; The number of new technological innovations introduced;	MAFWM
3	Continuation and increase of subsidies for organic agriculture (ha/head/hive, investments)	Increasing subsidies for organic production	Agrarian budget, donors, projects	MAFWM AAP LZ	Increase in production volume %; Increasing the content of organic matter (5%); Number of new farms in the organic production system; The number of new hives and hives in the organic system; Volume of new areas in the organic system;	MAFWM
5	Ensure remaining in the system of organic agriculture	Additional incentive measures should be provided, and financial support should be increased for young organic producers. Facilitate entry into the incentive system for young producers.	Agrarian budget, donors, projects	MAFWM AAP LZ	Number of certified new producers; Number of certified producers under 40 years of age; Number of tips given;	MAFWM

	Necessary	Action	Source of funds	Carrier	Indicator	Monitoring
6	Reduce unacceptable conversion and certification costs	Support for new organic producers in the conversion process and for certification, support for risk reduction	Agrarian budget, donors, projects	MAFWM AAP LZ	Number of tips given; Number of held workshops; Number of new producers; Volume of allocated financial support;	MAFWM
7	Increasing the share of organic areas in the total area of agricultural land.	Support for soil cultivation producers	Agrarian budget, donors, projects	MAFWM AAP LZ	Land area in the incentive system; Number of supported manufacturers;	MAFWM
8	Additional subsidies to producers for the sustainable use of genetic resources	Additional subsidies ensure the protection and preservation of the local gene pool, as well as the production of organic products that are more adapted to the specific conditions in which they are grown.	Agrarian budget, donors, projects	MAFWM IGR	Conserving genetic resources and increasing the number of on-farm conservation systems	MAFWM
10	Increase (commercial) production of certified organic seeds, train and link organic producers with seed/planting producers and seed companies	Establishing/ strengthening cooperation between farmers and seed producers/ seed companies. Database with the list of seeds for Organic Production.	Agrarian budget, donors, projects	MAFWM FA IGR AIRS	Established database/ register of seeds and planting material for OP	MAFWM

(MAFWM- Ministry of Agriculture, Forestry and Water Management; AAP- Agency for Agrarian Payments; LC- Local Communities; FA- Faculty of agriculture UNIBL and UES; IGR - Institute of genetic resources; AIRS- Agricultural Institute of the Republic of Srpska)

3.2. Development and Promotion of the Market.

The achievement of this goal will be driven by the application of environmentally friendly, economically sustainable, and socially acceptable marketing systems. Through this, local and regional producers will be strengthened and promoted (formation of bio-districts), favouring short supply chains and models of local consumption. The promotion policy will aim to increase consumer awareness and highlight the advantages of organic farming for environmental protection and animal welfare, thereby increasing demand for organic products. Efforts will be made to promote and enhance consumer knowledge about organic food and products through fairs and their use in public institutions.

Key starting points:

- Although domestic organic products are highly sought after and of good quality, they are not available in sufficient quantities, and imported organic products dominate the market;
- Insufficient promotion;
- General increase in consumer awareness of the importance of local organic products;
- Significant room for the development of short sales chains (direct farm sales, online sales, home delivery, etc.);
- Encouraging commercial gardening production (urban and bio-gardens);
- Training interested parties to be able to distinguish between conventional, integral, and organic products;
- Creating a slogan for domestic organic products.

	Necessary	Action	Source of funds	Carrier	Indicator	Monitoring
1	Strengthening public information and promotion of the organic sector	Website development.	Agrarian budget, donors, projects	MAFWM, producer organizations, producers	The existence of a website	MAFWM
	Strengthening public information and promotion of the organic sector	Production of promotional and informational material.	Agrarian budget, donors, projects	MAFWM, producer organisations, producers	Number of printed and distributed leaflets, brochures, manuals	MAFWM
	Strengthening public information and promotion of the organic sector	Media campaigns	Agrarian budget, donors, projects	MAFWM, producer organizations, producers	Number of conducted campaigns; Viewership and reach of implemented campaigns	MAFWM
	Strengthening public information and promotion of the organic sector	Participation in domestic and foreign fairs	Agrarian budget, donors, projects	MAFWM, producer organizations, producers	Number of organized fairs; Number of visited sams; Number of visitors at fairs;	MAFWM
2	Promotion of the use of organic products from the Republic of Srpska	Awareness raising and training for caterers, managers or other services in public institutions. Visits to organic farms. Introduction of Organic Food Day- once a year, in selected public institutions prepare a meal from organic products.	Agrarian budget, donors, projects	MAFWM, producer organizations, producers	Number of completed trainings and meetings; Number of attendees at the training; Number of completed visits; Number of attendees at events (Organic Day)	MAFWM

	Necessary	Action	Source of funds	Carrier	Indicator	Monitoring
3	Support for market integration of organic producers	Formation of several cooperatives or associations in the organic sector	Agrarian budget, donors, projects	MAFWM, producer organizations, producers	Number of formed cooperatives and associations	MAFWM
4	Developing a brand for organic products from Republic of Srpska	Brand development, including promotional activities with the promotion of national standards.	Agrarian budget, donors, projects	MAFWM, producer organizations, producers	The existence of a brand with all the elements that a brand entails; Number of promotional activities carried out; The scope of promotional activities	MAFWM

(MAFWM- Ministry of Agriculture, Forestry and Water Management)

3.3. Legislation, certification and policies.

To encourage the development of the organic sector, it is necessary to actively involve decision-makers and regulatory bodies in creating and implementing policies. This includes dialogue and cooperation with government representatives, ministries, and other relevant institutions to develop strategies that promote organic production, including incentives for producers and improvements to infrastructure and markets for organic products. Additionally, an important aspect is informing decision-makers about the significance of organic production for economic and social development, enabling them to make informed decisions. The Government of the Republic of Srpska and its relevant ministries invest in its development and improvement through existing laws and by-laws and participation in ministerial conferences on the sector.

Key starting points:

- Existing legal regulations at the level of the Republic of Srpska;
- Harmonizing entity-level legislation with EU regulations in the organic farming sector;
- Ensuring a constant and continuous policy of support for the organic production sector;
- Building the capacity of institutions involved in the organic production system (knowledge, human resources, infrastructure, etc.);
- Efficient implementation of the organic control system;
- Increasing the number of control bodies at the entity level;
- Enforcing legal regulations and integrating producers who use the “organic” label but are not in the system;
- Enhancing cooperation and communication between all involved parties;
- Sustainable use of natural resources in the field of wild collection;
- Adopting harmonised procedures and standards in line with EU standards;
- Effective implementation of the National Organic Agriculture Plan (NOAP).

	Necessary	Action	Source of funds	Carrier	Indicator	Monitoring
1	Adoption of the new (harmonized) law on organic production and related by-laws	Adoption of the Law on Organic Production in accordance with EU Regulation 848/2018, adoption of by-laws, it is necessary to ensure that all necessary by-laws are passed within the stipulated period	Agrarian budget, donors, projects	MAFWM	The Law on Organic Production was adopted Number of adopted by-laws	MAFWM
2	Increasing the capacity of the state administration dealing with organic production	Effective implementation of legal and by-laws and other support measures in the organic production sector	Agrarian budget, donors, projects	MAFWM, Inspec-torate	Efficient implementation of legal aspects regarding organic agriculture; The number of certified producers in accordance with the new legal framework.	MAFWM
3	Inclusion of organic production in national and local strategic documents	Support to local governments in the development of organic production models in terms of protection and sustainable use of natural resources	Agrarian budget, donors, projects	MAFWM	The number of local communities that adopted the organic agriculture development strategy	MAFWM
4	Establish a concept to ensure the prohibition of the use of GMOs in organic production	Incorporation into the legislation and accompanying documents of the prohibition and complete exclusion of GMOs in organic production	Agrarian budget, donors, projects	MAFWM, Inspec-torate	Number of enacted acts in the area	MAFWM

	Necessary	Action	Source of funds	Carrier	Indicator	Monitoring
5	Reduce the cost of analyzes required for organic products	Analysis of soil, water crop and product samples to assess the risk of persistent residues and application of non-authorized products.	Agrarian budget, donors, projects	MAFWM AAP AIRS FA projects	Number of conducted analyses; Captured surface; Number of covered manufacturers	MAFWM
6	Establish a concept for the sustainable collection of natural resources.	Financial support for inventory collection zone. Registration of collection centers. Education and registration of collectors. Monitoring and control of the sustainable collection.	Agrarian budget, donors, projects	MAFWM FRS	Number of supported entities; Number of registered centers; Number of conducted training; Number of attendees at the training	MAFWM
7	Establish policies for the involvement of all stakeholders related to the implementation of the NOAP	Establishment of appropriate commissions for consulting services, delegation of tasks to the commission sector, implementation of foreseen procedures	Agrarian budget, donors, projects	MAFWM LC	Number of organisations; The number of consultants employed within them; Number of producers per consultant	MAFWM
9	Monitoring implementation of NOAP	Continuous monitoring of whether the objectives and indicators are met by MAFW and at least annual reporting to the Advisory Coordinating Committee to allow corrective planning if needed.	Agrarian budget, donors, projects	MAFWM	Number of advice given and consultations carried out; Number of submitted reports	MAFWM

(MAFWM- Ministry of Agriculture, Forestry and Water Management; AAP- Agency for Agrarian Payments; LC- Local Communities; FA- Faculty of Agriculture UNIBL and UES; AIRS – PE Agricultural Institute of the Republic of Srpska; FRS- PE Forests of the Republic of Srpska)

3.4. Education, Research and Innovation

The primary role of education in organic agriculture is to raise awareness, knowledge, and information on issues related to organic production among experts, producers, and all those involved in the system. In addition to formal education within the curricula of secondary schools and universities, education at the basic level is also needed, for which the Ministry of Agriculture, Forestry, and Water Management (MPŠV) has already taken certain steps (e.g., brochure development). Besides formal education, it is necessary to initiate and encourage informal education, which is a very useful tool in providing solutions to problems in organic agriculture, organic processing, and technology transfer to all parties involved in the organic sector. Establishing educational centers and expert groups within informal education is a complementary alternative to formal education.

Furthermore, advisory services are a key element in developing organic agriculture. In the Republic of Srpska, the advisory sector in organic agriculture is in its initial stage of development, with significant potential for further growth. Training for organic agriculture is very modest and limited, provided as short courses within national or international projects with the support of international organisations and donor projects (GTZ, CIHEAM-IAMB, USAID, SLR, and others). The practice has shown that the best results come from “on-site” learning, and efforts should be made to strengthen the network within the organic sector and improve mutual connections between organic farmers both domestically and internationally, as well as between farmers, advisors, and researchers. A dedicated budget should be allocated to ensure the availability and training of advisors for organic agriculture, the demonstration of best practices in organic farming, and the collaboration and exchange of knowledge between all participants in the system.

Key starting points:

- Dissemination or transfer of research results to practice is not sufficiently effective;
- Cooperation between stakeholders is still too weak;
- Lack of research on organic agriculture;
- Free advisory services on organic agriculture are provided within the Agricultural Advisory Service;
- Insufficient number of advisors for organic agriculture;
- Those interested in organic production have a positive attitude towards further education;
- There is a need to increase knowledge and introduce innovations into the organic agriculture system.

	Necessary	Action	Source of funds	Carrier	Indicator	Monitoring
1	Development of curricula for the organic agriculture sector at the Faculties of Agriculture.	Capacity building at all levels of higher education- To increase the number of subjects in organic production as mandatory or optional within the framework of existing courses and/or establish new courses in academic studies of the first and second cycle of studies.	Agrarian budget, donors, projects	MSTDHE FA	Number of new orientations created; The number of subjects introduced in existing orientations; The number of students who attend the specified course	MAFWM
2	Increasing the number of qualified advisers in the field of organic agriculture.	Additional education and training of advisors in specific areas of organic production	Agrarian budget, donors, projects	MAFWM LC CCRS	Number of educations conducted; Number of consultants involved; Number of manufacturers per consultant	MAFWM
3	Study visits to organic producers abroad.	Financing and coordination of study visits by experts and consultants from the public and private sector	Agrarian budget, donors, projects	MAFWM LC CCRS	Number of educations conducted; Number of consultants involved; Number of manufacturers per consultant	MAFWM
4	Financial support for non-formal education	Practical seminars and courses for organic producers and collectors as a supplement to their professional training. Training in applied practices for producers in selected areas of organic production, with an emphasis on young people	Agrarian budget, donors, projects	MAFWM FA CCRS	Number of conducted seminars; Number of conducted courses and training; Number of manufacturers involved; Number of young people involved	MAFWM
5	Establish a system of licensing/certification of consultants for organic production	Elaboration of criteria for the training of consultants and the establishment of a system for selecting them	Agrarian budget, donors, projects	MAFWM FA	Number of trained consultants; Number of interviews conducted	MAFWM

	Necessary	Action	Source of funds	Carrier	Indicator	Monitoring
6	Development of technical manuals and guidelines for organic production	Provision of guidelines intended for all actors in the organic production system	Agrarian budget, donors, projects	MAFWM FA	Number of issued brochures, guidelines	MAFWM
7	Initiation of research projects in the organic production sector (demonstration trials, demonstration farms)	Establishment of experimental fields, demonstration fields and experimental farms	Agrarian budget, donors, projects	MSTDHE FA MAFWM IGR AIRS	Number of trials Mirror surfaces; Number of producers included in the trials; Number of producers to whom test results are available and submitted	MAFWM
8	Children and young people should gain knowledge about organic farming and healthy eating through experiential learning	Systemic support for education institutions to operate, upgrade or re-establish a school organic garden and run workshops in schools	Agrarian budget, donors, projects	MAFW MEC Network of school organic gardens, Organic school gardens association NGOs, kinder-gartens, elementary school	Number of established gardens; Number of held workshops; Number of schools involved; Number of children who attended the workshops	MAFWM
9	Increasing the level of knowledge of organic producers	Increasing financial assistance to farmers for education and introducing a mandatory training system during the year (winter schools)	Agrarian budget, donors, projects	MAFWM FA IGR	Number of farmers who have undergone training; The volume of financial support per farmer; The amount of the training budget	MAFWM

(MSTDHE - Ministry of Scientific and Technological Development and Higher Education; MEC - Ministry of Education and Culture MAFWM - Ministry of Agriculture, Forestry and Water Management; FA - Faculty of agriculture UNIBL and UES; IGR - Institute of genetic resources; AIRS – PE Agricultural Institute of the Republic of Srpska)

4. SWOT analysis

Strengths	Weaknesses
Existence of a legal framework	Insufficient information on organic production at all levels
Good climatic conditions and a clean natural environment	The absence of a database with all the necessary parameters for the sector
Traditional production represents a large share of total agricultural production	Limited availability of necessary inputs
Traditional cultivation systems with preserved indigenous varieties, local plant populations or animal breeds suitable for cultivation in an organic system	Failure to carry out continuous education of interested farmers
Established general institutional system	Insufficient investments in the development of the organic agriculture sector
Active international cooperation	Unfavorable structure of agricultural holdings (small areas and unorganised production)
Existence of control organisations	A small number of specialised consultants
Initiatives of the non-governmental sector for the development of strategic documents and plans	A small-scale sector and an underdeveloped market
Organic school gardens project	Absence of constant monitoring related to the protection of biodiversity, increasing soil fertility and impact on the environment
A wide range of non-formal training courses and a free choice of topics, seminars and conferences, current trends in organic farming, etc.	Insufficient systematic formal and informal education in the field of organic
Organised events, at home and abroad, with examples of good practices (associations, private sector, faculties ...)	Lack of accredited laboratories
Increase in direct sales, strong organic markets, direct contact between farmers and buyers	Insufficient technical support and advisory services
Product quality (no industrial organic farming – good overall story)	Insufficient human capacity and technical infrastructure for certain sub-sectors (fish and fish products, specific plant species, etc.)
Digitisation of knowledge- research from abroad is available	Narrow selection of seed varieties and high prices of organic seeds, which results in additional purchases of organic seeds
Very small organic farms	Too little money is spent on research in the field of organic farming
A large number of producers who work according to the principles of organic production	Insufficient availability of organic products on the market

Opportunities	Threats
Conventional production in small areas with minimal use of agrochemicals	The sector will not be recognised at the political level as a significant force for the development of agriculture, as well as the non-recognition of the potential of organic production
Increasing interest in organic production	Unrecognizability of organic products on the domestic market
Increased demand for organic products	Weak control of products that are declared as organic on the domestic market
Support for organic production by international donors	Slow development of organic production and opportunities to access the international market
Institutional support of organic production	Limitation of budget funds for the development of the sector
Association	Low financial power and capacities of the processing industry for the finalisation of organic products
Revitalisation of abandoned and rural areas has good potential for organic production development	Fewer subsidies compared to conventional production
Small farms that can only be competitive by producing value-added agricultural products	The size of local farms does not allow for adequate buffer zones, which can lead to soil, air and water contamination
Intensive small-scale commercial production of garden crops	The exit of farmers from the system of organic production
The interest of the younger and more educated population in organic production	Young people are not interested in organic farming because of the general lousy condition (reputation) of agriculture
Encouraging self-employment in organic production	The high cost of delivering non-formal education courses for only a few participants (dispersion); insufficient financial resources to organise non-formal courses
The rural tourism development strategy supports the development of organic production	Lack of cooperation between stakeholders in the field of promotion and advisory services
Favorable conditions for the development of eco-tourism	Advisory services or promotion do not sufficiently meet the needs of organic farmers
Product marketing through tourism and rural tourism (offer of organic, mainly local and traditional products)	Intensive promotion of other quality schemes (especially selected quality) may negatively affect the development of organic farming and reduce the importance of organic food in the market
Growing interest in the HORESA sector	Pressure from major providers of conventional farming equipment on research activities

An educated consumer	A closed system has not been established on organic farms (the largest number of plant organic productions depends on procurement from external sources, e.g. fertilisers)
Development of short chains, e.g. direct online sales, home delivery, community group buying	Declining consumer purchasing power
Intensive small-scale commercial garden crop production	
Rural areas in the Republic of Srpska occupy about 95% of the total area	
Most municipalities belong to areas with natural limitations that do not allow the development of intensive agriculture	

5. Abbreviations

AAP	Agency for Agrarian Payments
AIRS	Public Institution Agricultural Institute of the Republic of Srpska
CIHEAM-IAMB	Mediterranean Agronomic Institute of Bari
GTZ	German Technical Cooperation
FA	Faculty of agriculture UNIBL and UES;
FRS	Public Institution Forests of the Republic of Srpska
IGR	Institute of genetic resources;
LC	Local Communities;
MAFWM	Ministry of Agriculture, Forestry and Water Management;
MEC	Ministry of Education and Culture
MSTDHE	Ministry of Scientific and Technological Development and Higher Education; NOAP - National Organic Agriculture Plan
OCS	Organic Control System
OK	Organic Control
SWOT	Analysis of Strengths, Weaknesses, Opportunities and Threats
TAIEX	European Commission's Technical Assistance and Information Exchange Instrument
USAID - U.S.	Agency for International Develop ment

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(NOAP) 2023 - 2026

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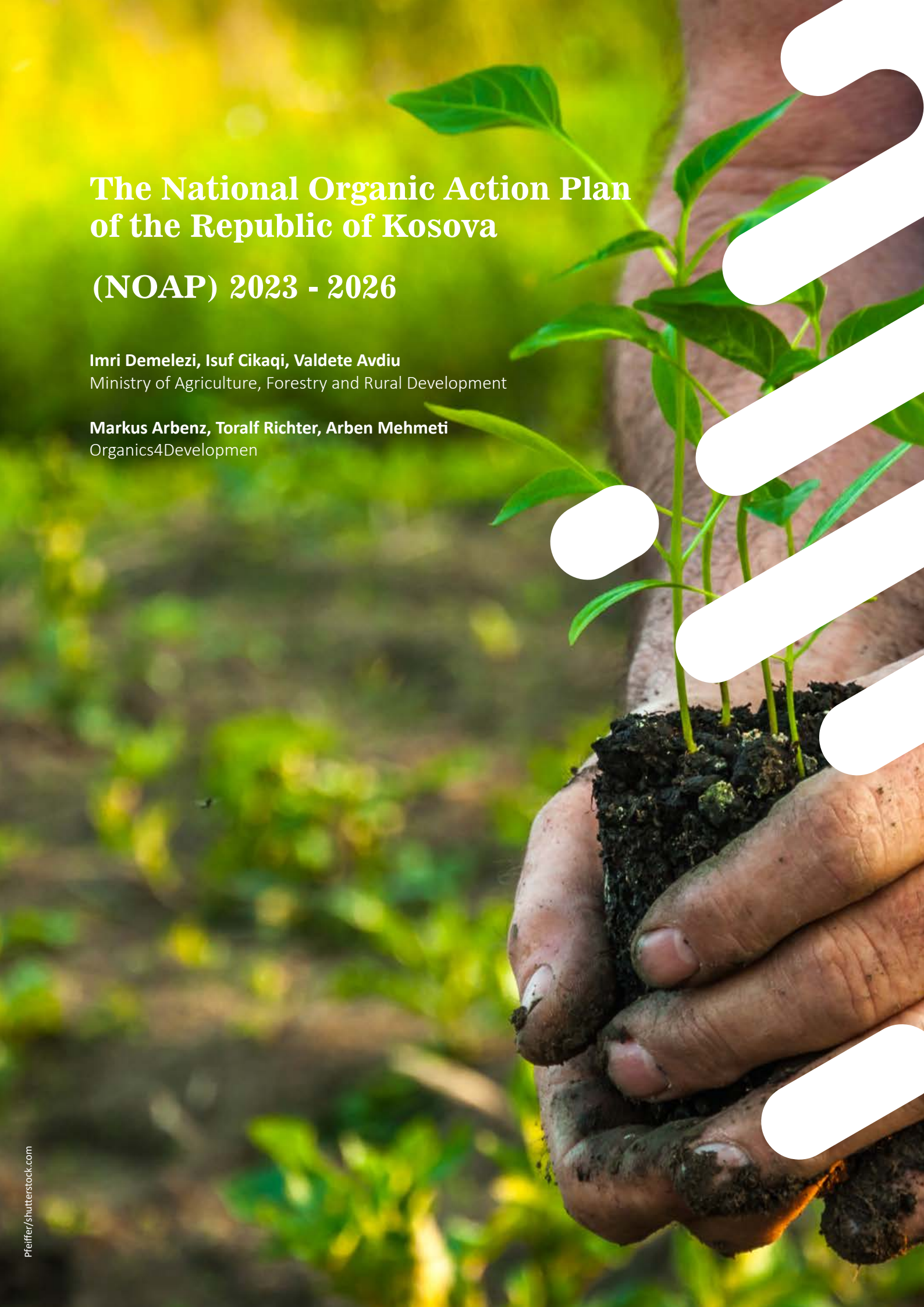

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REPUBLIC OF KOSOVA

MINISTRY OF AGRICULTURE, FORESTRY AND RURAL DEVELOPMENT

THE NATIONAL ORGANIC ACTION PLAN OF THE REPUBLIC OF KOSOVA 2023 - 2026

DISCLAIMER

This publication was created with donor support for the needs of the Ministry of Agriculture, Rural Development, and Forestry of Kosovo*. The opinions and content expressed do not necessarily reflect those of the Standing Working Group for Regional Rural Development in Southeastern Europe.

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence

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In the preparation of the NOAP 2023-2026, several institutions from state and private sector participated and contributed from their field of expertise. The NOAP stakeholder group included MAFRD officers, representatives of farmers, consumers and citizens associations, researchers, NGOs, market actors and business organizations.

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List of abbreviations

AAD:	Agency for Agricultural Development
ADC:	Austrian Development Cooperation
ARDP:	Agriculture and Rural Development Plan
CIHEAM	Centre International de Hautes Études Agronomiques
COF:	Commission on Organic Farming
DAPM:	Department of Agricultural Policies and Markets
DEAAS:	Department of Economic Analyses and Agriculture Statistics
DF:	Department of Forestry
DRDP:	Department of Rural Development Policy
EU:	European Union
UNFAO:	Food and Agriculture Organization of the United Nations
FiBL:	Research Institute of Organic Agriculture
FVA:	Food and Veterinary Agency
GDP:	Gross Domestic Product
GIZ:	Deutsche Gesellschaft fuer Internationale Zusammenarbeit
GPS:	Global Positioning System
IADK:	Initiative for Agricultural Development of Kosovo
IFOAM:	International Federation of Organic Agriculture Movements
IPARD:	Instrument for Pre-Accession Assistance in Rural Development
ISMAFRD:	Institutional Support of Ministry of Agriculture, Forestry and Rural Development
KAS:	Kosovo Agency of Statistics
KEAP:	Kosovo Environmental Action Plan
KEPA:	Kosovo Environmental Protection Agency
KFA:	Kosovo Forestry Agency

KIESA:	Kosovo Investment and Enterprise Support Agency
MAFRD:	Ministry of Agriculture, Forestry and Rural Development
MAPs:	Medicinal and Aromatic Plants
MFLT:	Ministry of Financave, Labor dhe Transfers
MESPI:	Ministry of Environment, Spatial Planning and Infrastructure
MEST:	Ministry of Education, Science and Technology
MSD:	Market System Development
MIET:	Ministry of Industry, Enterpreneurship and Trade
NGO/GO:	Non-Governmental Organization/Governmental Organization
NOAP:	National Organic Action Plan
NWFPs:	Non-Wood Forest Products
O4D:	Organics for Development consultancy, Switzerland, Markus Arbenz
OAAK:	Organic Agriculture Association of Kosovo
Organika:	Association for Organic Agriculture in Kosovo
PPSE:	Promoting Private Sector Employment
SAA:	Stabilization and Association Agreement
SAP:	Stabilization and Association Process
SIRED:	Sustainable and Inclusive Rural Economic Development
SWOT:	Strengths, Weaknesses, Opportunities, Threats
TAIEX:	Technical Assistance and Information Exchange
TAK:	Tax Administration of Kosovo
UAA:	Utilized Agricultural Area
UNDP:	United Nations Development Programme
USAID:	United States Agency for International Development

Foreword

It is of high priority for MAFRD to incorporate sectorial visioning of stakeholders into the strategic documents for implementation such are action plans. The National Organic Action Plan of the Republic of Kosovo (NOAP) for the period 2023-2026 enforces our aim to support further organic farming. Confirming the increasing role of the agricultural sector via substantial increase of financial support, vast number regulations and documentations for the Government of Kosova, and of the MAFRD under my lead, any transition towards more sustainable production methods, including organic farming, is of high priority for the Republic of Kosova. Strengthening the agriculture development based on the practices and values of organic farming can afford many benefits, from an economic, environmental, and social aspects.

The Republic of Kosova, MAFRD, stresses the importance of reforms in its agricultural policy to comply with farmers, operators and costumers needs along the European Union (EU) policy reforms and values.

Since the establishment of the Organic Agriculture Association of Kosova (OAAK) in 2002, first pioneer organisation, which initiated the organic movement and now in 2023 where,, Organika,, is operating in organic sector, we have all witnessing the important changes in organic agriculture, thanks to different projects and preparation of national legislation for the organic production and above all the commitment of organic farmers, collectors and operators to organic principles to sustain the nature. Significant impact on increase role and awareness on organic farming and products are investments and willingness of producers to continuous knowledge gathering and exchange and ability to learn and implement the principles and standards of organic production.

Kosova has become a favourable country for foreign investments, parts of which have already been allocated to the production and export of Kosovo organic products, especially Non-Wood Forestry Products (NWFPs), and the cultivation of Medicinal and Aromatic Plants (MAPs) has been developed very well in the past few years.

The NOAP provides clearly identified 4 pillar objectives and 19 actions packages and indicates the stakeholders responsible for its implementation. This sends a clear signal to the donor agencies to get actively involved in the proposed actions aimed at organic agriculture development.

The MAFRD, through its active involvement, recognizes the support received from producers and other stakeholders, who contributed to the development of the National Organic Action Plan 2023-2026 of the Republic of Kosovo, and expresses its gratitude to them.

MAFD express deep appreciation to the project “Sustainable and Inclusive Rural Economic Development (SIRED)”, funded by Austrian Development Agency (ADA), and to all those who have collaborated with us to prepare the NOAP 2023-2026.

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Minister of Agriculture, Forestry and
Rural Development

Executive Summary

Kosovo looks back to more than 20 years of organic development with an arising sector that has many opportunities for export and domestic markets to grow. In fact, the certified organic area has significantly grown. While in 2009, there were only 5 hectares with organic medicinal and aromatic plants (MAPs), by 2020 this figure had increased to a total of 1,672 hectares of organic production (including MAPs with 1'039.71 hectares) by 66 organic operators plus 373'488 ha wild collection area. 35 certified companies are operating in the organic MAP sector and 45 collection centers for MAPs cover the whole territory of Kosovo. The collection centers organize the collection, drying and sub processing of wild and medicinal plants and generate an income for 3'200 collectors. Kosovo is among the countries with the biggest areas for organic wild collection worldwide. The majority of the production volume was exported to Germany, Austria and Switzerland.

The first Kosovan organic law (n 02/L – 122) had passed in spring 2007, however until today no operators are certified against this standard. A subsidy system has been launched by MAFRD in 2016 to offer interested farms incentives to start with the conversion process. MAFRD supports farmers through direct payments in organic production with specific values for each cultivated crop (fruit sector, viticulture and cereals).

MAFRD staff together with organic stakeholders in Kosovo developed a first National Organic Action Plan, NOAP for the period of 2018-2021, which contained clearly identified objectives and actions and indicated the actors responsible for its implementation. In 13 areas of activity, it covered the production, processing and market development, the legislation, certification and control, the policy, research, education, training and extension services.

In 2022, the stakeholders clearly expressed the wish for a second NOAP from 2023- 2026. The process revealed that the organic farming sector grew and developed in recent years, but there are many challenges that need to be faced by farmers and institutions. The analyses reveal the following strengths, weaknesses, opportunities and threats:

Strengths:

- The organic sector in Kosovo is continuously growing
- Organic farmers and processors getting better equipped
- Farmers have gradually strengthened their technical capacities

Weaknesses:

- Still low level of technical capacities among organic operators
- Lack of organic inputs
- Weak extension service for organic farms and less research in organic agriculture
- Small scale farms in Kosovo don't have the possibilities for the effective use of most modern technologies

Opportunities:

- Favorable natural conditions and political willingness to support the organic sector
- Donor programs are supporting organic agriculture
- Capacity building programs could strengthen the technical capacities
- International demand for organic products
- Farmers are open for organic production

- New organic value chains under development

Threats:

- Global economic and climate crisis can weaken organic sector development
- Low consumer awareness about organic production and products
- Insufficient support and leadership of MAFRD
- Lack of labor forces in rural areas
- No / low price margins for organic products
- High costs for organic certification and inputs

Kosovo aims at a fully functional, successful, sustainable, and nationally and internationally well-renowned organic food and farming sector. An increasing number of stakeholders including farmers and businesses produce accessible, environmentally sustainable organic food, drinks, textiles, and other organic products for the local and export markets. Relevant and high-quality services such as sector coordination, match making e.g. in trade fairs and internet platforms, certification, advisory services, research, laboratory services, education and promotion support the value chain actors. Fair and well implemented rules and regulations are in place.

To get closer to this vision, Kosovo has the following overall objectives until end of 2026

"A well-functioning Kosovo organic production on a relevant and increasing area supplying the domestic and export markets with attractive producer prices and satisfying the demand of consumers. The market has suitable framework conditions and offers supporting services to further grow and to develop qualitatively."

Kosovo has a holistic strategy of developing the organic market looking at all its aspects including the production, processing, trade and consumption as well as regulations and supporting services with a Market System Development (MSD) view. The strategy identifies four pillars of measures with own objectives and which interact closely: A) Production and Processing B) Market development C) Legislation, certification and policies and D) Research, education, training and extension. In total, the National Organic Action Plan has 19 action packages as follows.

Activity area A: Production and Processing in the organic sector

A1 Subsidies for inputs

A2 Subsidies for certification and conversion

A3 Subsidies for land cultivation

A4 Infrastructure development (subsidies for investments)

Activity area B: Market development

B5 Public communication and promotion (consumer information

B6 Organic statistics and market information for operators

B7 Value chain facilitation

B8 Export promotion

Activity area C: Legislation, certification and policies

C9 Organic law enforcement including CB accreditation for the certification against the national organic law.

C10a Organic law revision adapting to the EU or

C10 Organic law revision with an own strategy

C11 Introduction of Kosovo Organic Logo for the domestic market

C12 NOAP management, monitoring and enforcement.

C13 Organic policy development and mainstreaming organic in overall Kosovo food system and education policies

Activity area D: Research, education, training and extension

D14 Organic applied research

D15 Adequate management of extension services and proper competence for organic advice for farmers.

D16 Facilitation and networking of organic institutions in Kosovo and internationally

D17 Capacity building in the organic sector

D18 Integrate education about sustainable food, agriculture and organic systems

D19 To strengthen the cooperation with international agencies.

1. Sector analyses 2022

1.1. The Kosovo organic sector until 2022

Since the end of the war in 1999, Kosovo has experienced a modest economic growth whereas agriculture is considered very important for economic development of Kosovo. Agriculture activities have traditionally been part of the daily life of many people living in the rural areas where more than half of the population lives (MAFRD, 2013). There are 1.1 million hectares of land from which 38.53% is agricultural land, 44.11% forest, and forests, 4.40% urban land and other 12.96%[1]. The utilized area of agricultural land is 420.326 ha (including common land), of the total used area of agricultural land. Most of it (51.65%) is meadows and pastures (including common land). Arable land-fields are 44.82%, perennial crops 3.27%, and gardens 0.29%[2]. A small part of the agricultural sector, 0.4% is dedicated to organic agriculture[3].

Policy makers in Kosovo recognized early, that organic production methods could be a useful option for the country with many abandoned farms and a low level of technical infrastructure, and often a subsistence kind of agriculture that neither uses fertilizers nor pesticides, just soil and labor. The first steps towards an organic network were taken in 2001 through a project for introducing organic farming to the Balkans (introduction of organic farming and low input sustainable agriculture in the Balkan countries) set up in 1999 by the Dutch foundation Avalon.

Even if there was not a real market for organic produce in this period, some farms have begun to follow the principles of this kind of production. In 2009, the first operator “Agroproduct” was certified to produce small fruit and medical herbs followed by “Hit Flores”.

After that pioneer phase, various international donor organizations supported the development of the organic sector during the last 20 years, mainly by technical assistance to the public and the private sector or with financial contributions to investments to increase the productivity and quality of organic products from Kosovo. Support was financed e.g. by GIZ, USAID, and ADA and implemented by international organizations such as CARITAS Switzerland, SWISSCONTACT or FiBL. In parallel, the national association ORGANIKA and the agricultural competence center IADK took a leading role in the development of relevant structures and in facilitating technical capacity building.

The main drivers of development and engines of growth were the various private sector companies that were founded and started to export mostly non-timber forest products, the medical and aromatic plants. Those companies, private sector, are also the backbone of the organic sector in the future.

Regarding the legal framework, the Organic Agriculture Association Kosovo (OAAK) has had a decisive role in proposing the first relevant Kosovan law (n 02/L – 122), which had passed in spring 2007, based on European Regulations. Later, with the support of the Italian project KOSAGRI and TAIEX specialists, the MAFRD prepared eight Administrative Instructions (AI) in order to implement the Law 04/L 85 on organic farming effectively, in alignment with the EU Legislation. According to AI No.02/2019 on organic production control system, control authority, certification and control bodies and the rules for their implementation, MAFRD represents the Competent Authority and is responsible for the organization of the control system.

1 Strategy for agriculture and rural development 2022-2028, MAFRD 2021
2 Kosovo Agency of Statistics, Results of the Agricultural Holdings Survey (AHS), 2021.
3 FiBL & IFOAM – Organics international. The World of Organic Agriculture. Statistics & Emerging Trends. 2022

A subsidy system has been launched by MAFRD in 2016 to offer interested farms incentives to start with the conversion process. MAFRD supports farmers through direct payments in organic production with specific values for each cultivated crop (fruit sector, viticulture and cereals). The Agency for Agricultural Development (AAD) is responsible for the implementation of the direct payment scheme.

In addition, the MAFRD staff together with the relevant organic stakeholders in Kosovo developed a first National Organic Action Plan (NOAP 2018-2021), which contained clearly identified objectives and actions and indicated the actors responsible for its implementation in 13 areas of activity (which cover the production, processing and market development, the legislation, certification and control, the policy, research, education, training and extension services). However, NOAP 2018-2021, was just passively communicated and in consequence couldn't be used effectively as guiding paper of the organic sector development.

Based on the 2020 Legislative Program approved by the Government of the Republic of Kosovo, an Ex-Post evaluation of the regulatory impact of the Law No.04 / L-085 on Organic Farming has been conducted, which acknowledged that the organic farming sector has started to grow and develop in recent years, but there are many challenges that need to be faced by farmers and institutions.

Over the last 20 years, the certified organic area has significantly grown. While in 2009, there were only 5 hectares with organic medicinal and aromatic plants (MAPs), by 2020 this figure had increased to a total of 1,672 hectares of organic production (including MAPs with 1'039.71 hectares). The majority of the production volume was exported to Germany, Austria and Switzerland.

Table 1 indicates some important milestones and summarizes the development of the organic sector in the last 20 years.

Table 1: Major milestones of the organic sector development in Kosovo

Year	Milestone in the development of the organic sector in Kosovo
2002	The first Organic Agriculture Association of Kosovo (OAAK) was established. The first activities in the field of organic agriculture in Kosovo started. Professors from the University of Pristina- Faculty of Agriculture and Veterinary, in the framework of Avalon project, supported a small number of farmers from the Dukagjini region, who produced in accordance with organic agriculture principles with the support of the association OAAK. Start of cross-border cooperation, with continuous support from various funding sources in the field of education and training, study visits (Albania, Croatia, Serbia, the Netherlands, Switzerland, Germany and other countries) and publishing of brochures and a bulletin about organic agriculture.
2004	Initial expertise for drafting the legal basis for organic agriculture was provided in 2004 by the AVALON project from the Netherlands, and the preparation of organic standards started, with support from OAAK.
2008	The first report on the organic agriculture development program was prepared by the project “Institutional Support of Ministry of Agriculture and Rural Development” (ISMAFRD). MAFRD issued the first Law on Organic Farming.
2009	The first organic farmers were certified for NWFPs and honey.
2011/12	With the support of KOSAGRI project the new Law on organic farming was issued and approved by the Parliament.
2013	The association “Organika” was established, representing the main sector operators for NWFPs and MAPs, with objectives to improve cooperation between the organic sector actors, to promote organic products from Kosovo and to advocate for the organic sector development.
2016/2017	The administrative instructions for the implementation of the Law on organic farming have been elaborated during 2014-2017 by TAIEX and KOSAGRI specialists and the completed Package was presented in 2017. First state subsidy program launched to support organic agriculture.
2018	The first National Organic Action Plan was launched, elaborated by a team of MAFRD (Kosovo) and CIHEAM – Bari (Italy).
2019	Organika becomes member of IFOAM Organics International
2022	The first Capacity Development Concepts have been developed by stakeholder groups and FiBL for the organic MAP, Berries and Vegetables Value Chains in the frame of the SIRED project. The first NOAP has been evaluated by sector stakeholders facilitated by Organics4Development from Switzerland. It is the base for the NOAP 2023-2026.

Source: NOAP Kosovo 2018-21, SIRED program and interviews

1.2. Sector status 2022

1.2.1 Overview

Despite of the recent dynamic and a history of 20 years certified organic agriculture and wild collection in Kosovo, organic agriculture is still on a niche level with 0.4% of the total cultivated agricultural area (see table 2).

Table 2: Development of the organic certified area between 2019 – 2020[4]

Country	Year	Organic area (farmland) [ha]	Organic area share of total farmland [%]
Kosovo	2019	1'036.00	0.25
	2020	1'604.00	0.38

However, recently initialized by the technical and financial support from the SIRED program as well as triggered by the international market demand, there is a significant tendency to cultivate more organic MAPs and berries and to start with first demo-trials in organic vegetable production.

The EU introduces now the new Organic Regulations, with a start of implementation on January 1, 2022 with a transition period until end of 2024. Stakeholders and organic farmers in Kosovo are still busy understanding the new requirements and to adapt the organic supply chains systems in terms of required structures and documentary procedures. Stakeholders and master trainers in Kosovo have been trained in this regard by FiBL in the course of the SIRED project.

Besides, for the three organic value chains, MAP, Berries and Vegetables, Capacity Development concepts have been elaborated as a guiding element to support the organic sector on an individual and institutional level.

The efforts from the private sector to further develop the organic sector in Kosovo are framed by the clear political will to further support the organic sector development by targeted actions.

After the old NOAP expired end of 2021, in 2022 the process started to draft a new NOAP 2023 – 2026, which take up the needs, aims and actions to be undertaken for the promotion of long-term and accelerated development of organic agriculture.

The new NOAP foresees a stronger awareness-raising of organic agriculture among farmers, the general public, policy makers and donors thus creating additional interest towards this opportunity to sustainable development.

1.2.2 Production and processing

Production

The organic production in Kosovo is developing stable. Non-Wood Forest Products (NWFP) dominated the export of organic products from Kosovo for many years, however, nowadays organic products from agricultural production are increasingly exported.

In 2020, 1’604 ha have been cultivated according to organic standards by 66 organic operators plus 373’488 ha wild collection area were certified.

4 Source: FiBL & IFOAM – Organics international. The World of Organic Agriculture. Statistics & Emerging Trends, 2022

The production and collection of MAPs has the biggest economic relevance in the organic sector of Kosovo. Altogether, 35 certified companies are operating in the organic MAP sector and 45 collection centers for MAPs cover the whole territory of Kosovo. The collection centers organize the collection, drying and sub processing of wild and medicinal plants and generate an income for 3'200 collectors.[5]

Apart from the collection of NWFP and cultivation of MAPs, the most relevant product categories are oilseeds, vegetables and cereals (see table 3).

Table 3: Usage of organic area in Kosovo by product categories in 2020[6]

Product category	Area (ha)
Oil seeds	324
Vegetables	147
Cereals	119
Walnut Trees	11

Source: FiBL & IFOAM – Organics international (2022)

Nowadays also berry production and organic pepper production are activities, which have been promoted and piloted recently and will further develop according to the domestic, regional and international market conditions.

According to the not published Inception Report from SIRED in 2020, the entire organic production in Kosovo is still lacking technical capacities and farmers have difficulties to get access to effective organic inputs, which have been approved by the certification bodies. Both described challenges led in consequence in the past to rather low yields and product qualities.

Processing

In the year 2020, altogether 21 organic processors had a valid organic certificate. The most of the processing activities are related to drying and processing MAPs or freezing berries to make them ready for export requirements.

1.2.3 Domestic markets and consumption

The awareness of the principles and benefits of organic production among farmers and consumers in Kosovo is still low even though the idea of organic agriculture enjoys a good reputation apart from being felt expensive. People don't know much about the regulation and mandatory certification and the interest to buy organic food is still low. Therefore, market actors such as retailers have not yet pushed organic food items to the market.

Besides, the consumers' purchasing power on the domestic market is still low and food safety is the main concern for the primary sector. Nevertheless, organically labeled products of local origin and imported ones can be occasionally observed for some product groups (e.g. eggs, herbs, juices, honey).

5 Avdiu, V. (2022): Organic agriculture, legal harmonization, transposition, certification and access to organic goods market. In Proceedings of the first Meeting of the Regional Expert Advisory Working Group REAWG on Organic Agriculture within the "Agriculture Policy Dialog Germany Western Balkan" (09.-11.03.2022), Pristina

6 FiBL & IFOAM – Organics international. The World of Organic Agriculture. Statistics & Emerging Trends, 2022

1.2.4 Export markets

Over the last years, the exporters from Kosovo have established vivid business partnerships to traders mainly in Europe. Most of the export activities are related to semi processed products with a value of 12 million EUR. Almost the entire production of certified organic products in Kosovo (95%) is exported. The main export destinations are Germany, Austria and Switzerland.[7]

The export market and its prospects are the main drivers in the organic agriculture in Kosovo. While in the beginning, only organic MAPs have been exported from wild collection, the demand increased over the last years and let the collection centers start to contract farmers to cultivate organic MAPs.[8]

Between 2018 and 2021, the total exported quantity to EU countries fluctuated between 361 and 522 tons. MAPs are by far the largest exported product group, followed by fruits (berries), spices, seeds and vegetables.

There is a clear increase in the export of MAPs, while the export volume of fruits and vegetables dropped within the period of 2018-2021. (see table 4).

Table 4: Development of organic exports from Kosovo to the EU between 2018 and 2021 by product categories [9]

Exported Volume (t)	**Year**			
Product category	**2018**	**2019**	**2020**	**2021**
Bulbs, roots and live plants (MAPs)	200	266	207	328
Fruits	259	132	56	80
Nuts and spices	62	11	7	74
Miscellaneous seeds	1	26	19	24
Vegetables, fresh, chilled and dried	14	32	61	12
Oilseeds, other than soyabeans	8	15	11	3
Feed and feed ingredients	-	-	1	-
Tea	-	6	-	-
Total	**544**	**489**	**361**	**522**

The main export destinations for organic products from Kosovo in EU countries are Germany Austria, and nowadays also Lithuania, Slovenia and Croatia (see table 5).

7 Avdiu, V. (2022): Organic agriculture, legal harmonization, transposition, certification and access to organic goods market. In Proceedings of the first Meeting of the Regional Expert Advisory Working Group REAWG on Organic Agriculture within the "Agriculture Policy Dialog Germany Western Balkan" (09.-11.03.2022), Pristina

8 Organika (2019): Assessment of Non-Wood Forest Product and Medicinal and Aromatic Plant Sector.

9 EC (2022): Agricultural Markets Briefs- EU imports of organic agri-food products (Analysis of data from TRACES)

Table 5: Development of organic exports from Kosovo to the EU between 2018 and 2021 by import countries[10]

Exported Volume (tons)	Year			
Import country	**2018**	**2019**	**2020**	**2021**
Germany	139	268	258	335
Austria	86	79	72	61
Latvia	-	-	-	40
Slovenia	-	-	-	40
Croatia	-	-	-	37
Italy	-	-	3	9
Belgium	99	-	-	-
Czech Republic	159	140	-	-
France	-	3	8	-
Hungary	60	-	-	-
Netherlands	1	-	20	-
Total	**544**	**489**	**361**	**522**

Switzerland imported 2020 organic certified MAPs from Kosovo with a volume of 23 tons and no other product categories.

Due to the lack of technical capacities (as mentioned under chapter 1.2.2) it is not surprising, that the image of organic exporters from Kosovo is behind the ones from other export countries in Europe. This is a result of the market study about the potential of Organic Berries and MAP from Kosovo to Germany, Switzerland and Austria in 2020. The interviews with importers in the 2020 suggested, that there is a clear potential for a higher export trade volume of Organic Berries and MAPs. However, in the importer's eyes, Kosovo has the image of a sourcing country with favorable product prices while other criteria such as quality, reliability, etc. are assessed lower compared to other sourcing countries.[11]

1.2.5 Supporting measures of the government

Since 2016, hectare-related subsidies for cultivation of MAPs and other crops such as cereals, vegetables and fruits have been introduced as a premium above the general subsidies which also conventional farmers receive.

Currently, the subsidies for all organic certified crops exceed the conventional cultivated crops only by 50 EUR/ha, what offers not a relevant economic incentive to new farms to convert to organic agriculture.[12] Besides, the amount of direct payments decreased significantly over the last years (see table 6). On contrast to farmers, pickers of certified NWFP don't get any financial support.

10 EC (2022): Agricultural Markets Briefs- EU imports of organic agri-food products (Analysis of data from TRACES)

11 Richter, T, I. Kampermann, B. Pulai (2020): Export potential of Organic Berries and MAPs from Kosovo to Germany, Switzerland and Austria. Top Line Report.)

12 Administrative Instruction (MAFRD) No. 07 /2021 on direct payments in agriculture for 2021.

Table 6: Development of direct payments for organic agriculture in Kosovo between 2016-22[13]

Years	Direct Payments per ha (EUR)
2016	200,-
2017	300,-
2018	500,-
2019	500,-
2020-2022	50,-

Support through the NOAP 2018-21

The NOAP 2017-21 entails various measures to promote production, marketing development, research, education, training, extension, legislation, certification etc. which were implemented to a certain extent only (estimated to 80% by MAFRD). The introduction of the subsidy system was led successfully by the government. Other measures, e.g. building up capacities for farmers, trainers and consultants, were mostly implemented by donor programs.

1.2.6 Rules, regulations and conformity assessment

The Law No. 04/L 085 on Organic Farming was constructed pursuant to the Council Regulation (EC) No. 834/2007 on organic production and labelling of organic products, and the Commission Regulation (EC) No. 889/2008 laying down detailed rules for its implementation.

With the support of the Italian project KOSAGRI and TAIEX specialists, the MAFRD prepared eight Administrative Instructions in order to implement the Law 04/L 85 on organic farming effectively and the Tables of Concordance constituted the guidelines for the AI, which explain the procedures for the approximation and alignment with the EU Legislation.

Administrative Instructions:

1. AI No. 01/2019 on duties, responsibilities and composition of the Commission on organic farming;
2. AI No. 02/2019 on organic production control system, Control Authority, control bodies and the rules for their implementation;
3. AI No. 03/2019 laying down the rules for organic plant production;
4. AI No. 04/2019 laying down the rules for organic livestock production and feed;
5. AI No. 05/2019 laying down the rules on organic aquaculture production;
6. AI No. 06/2019 on criteria, standards and conditions for imports of organic products in Kosovo;
7. AI No. 07/2019 on designation of the organic production logo and specific requirements for labelling;
8. AI No. 08/2019 laying down the rules for production and methods for organic processed products.

13 Source: MAFRD, Annual administrative Instructions on Direct Payments (between 2016 and 2022) in Agriculture of the various years.

1.3. Overview of Strength, Weaknesses, Opportunities and Threats

The SWOT analysis of the organic sector in Kosovo has been derived by the answers of the online stakeholder survey and focus group discussions in 2022 and presented at the Policy Workshop in Pristina on October 11, 2022.

Concluding the results of the listed strengths and weaknesses as well as the opportunities and threats, the results visualized in figure 6 suggest that there is still a lot of work ahead for the sector. However, there are also clearly seen strengths of the sector and opportunities which have to be used and exploited by actors of the sector.

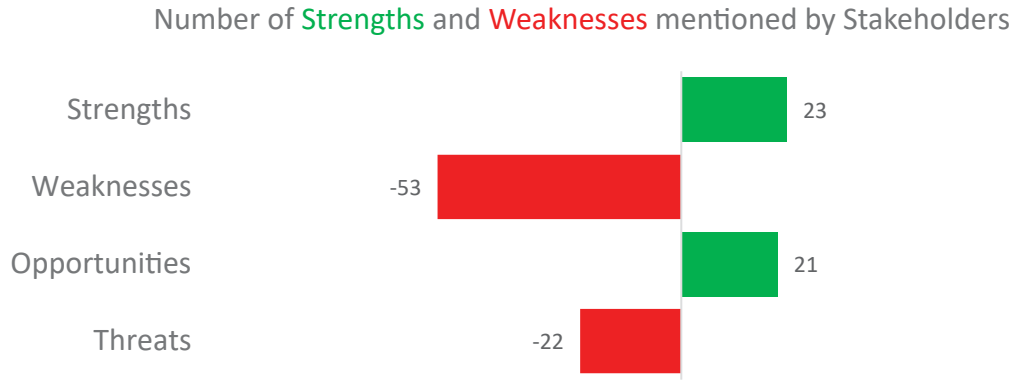

Figure 6: Comparison of strengths, weaknesses, opportunities and threats, mentioned by organic stakeholders in Kosovo; Online Organic Stakeholder Survey, 2022

Strengths

a) The organic sector in Kosovo is continuously growing

Organic agriculture in Kosovo has grown steadily in recent years. This applies both to the size of the area and the number of producers and processors. This also applies to the service provider sector. The institutions organized as service provider, such as the association Organika and the agricultural competence center IADK, have stabilized their structures and have been able to gain more expertise and pass it on to farmers.

Besides, Business Support Organizations, such as PePeKo (Vegetables) and Mjedrat ne Kosove (Berries) are active in piloting organic plots and farms.

b) Organic farmers and processors getting better equipped

During the past years, several donor programs (e.g. GIZ, PASURI, SIRED, PPSE, UNEP, USAID) support farmers and collection centers in the purchase of drying or sorting equipment (MAP), in the construction of cooling/freezing facilities (berries) or in the purchase of agricultural equipment for soil cultivation, sowing or weed control.

c) Farmers have gradually strengthened their technical capacities

During the past years, technical trainings have been provided by various donor programs to stakeholders, farmers and trainers of the three main important value chains, MAPs, Berries and Vegeta-

bles. Gradually, the shared expertise is trickling down and influences the cultivation praxis of modern organic field practices. Nevertheless, there is still a lot of work ahead of the sector to strengthen the capacities of organic operators in a sustainable and stable manner (defined in Capacity Development Concepts for the Berry, MAP and Vegetable Sector).

Weaknesses

a) Still low level of technical capacities among organic operators

The organic sector in the last 20 years has been dominated by wild collection activities. In contrast, the organic crop and horticulture production is still in a pioneer phase. This is the main reason, that a more comprehensive expertise about organic cultivation practices is still lacking. The biggest technical challenges are to plan the crop rotations, an effective weed control, pest and disease management as well as effective measures in post-harvest management.

b) Lack of organic inputs

Until now, in organic crop and horticulture production, organic farmers in Kosovo trust on the application of effective organic inputs. They differ in that point to traditional organic farming practices as common in Western European countries, where organic farmers try to rely on preventive measures of plant protection and use compost and manure rather than organic fertilizers. On top, many farmers are not aware, what those organic inputs entail.

Besides, high quality seeds and planting materials are not available in a sufficient amount.

c) Weak extension service for organic farms and less research in organic agriculture

Although many qualification measures for advisors and trainers have taken place in recent years, there is still a lack of an effective extension service that can provide technical support to organic farms (particularly in the first years of organic cultivation). Especially farmers in the conversion period would need coaching programs, where experienced advisors could accompany the learning process of new organic farmers.

The networks between the research institutions (e.g. universities) and private sector/civil society (business, NGOs, Association) are weak. At the universities, organic agriculture is hardly subject of research programs and of learning events. Research results are not well published and not easy to find.

d) Small scale farms in Kosovo don’t have the possibilities for the effective use of most modern technologies

The typical organic farms in Kosovo are micro or small-scale farms. These farms are lacking financial capital for any investments. But also, the farm size is too small to pay off any investments. The consequent work in cooperatives to share equipment with other farm members is not a common practice among farmers in Kosovo. This fact can also be seen as one of the reasons for the low yields and low product qualities.

Opportunities

a) Favorable natural conditions and political willingness to support the organic sector

Kosovo has conducive natural and political conditions for organic farming. Weather and soil conditions are suitable for organic crop and horticulture production. The government is willed to support organic farmers by slight subsidies and to follow the course of activities, written down in its National Organic Action Plan.

b) Donor programs are supporting organic agriculture

Kosovo is one of the countries in Europe with the highest amount of donor support per capita. A big amount of the donor funds are dedicated to agricultural programs, which mostly also promote organic agriculture as important source to create jobs in rural areas and contribute to poverty alleviations.

c) Capacity building programs could strengthen the technical capacities

Most of the agricultural donor programs entail trainings for trainers or farmers. This is important to strengthen the capacities of the organic sector. However, so far, the single measures were offered just punctual and were not systematically and chronological linked to each other as a wholistic Capacity Development program is lacking so far.

d) International demand for organic products

The international demand has been the main driver of the organic sector development in Kosovo over the last 10 years. Although in 2022 the demand of organic products in many of the target countries is stagnating due to the economic crisis, there is a clear long-term prognosis of a further growth of organic markets in the target countries. This will attract more farmers to convert to organic agriculture or to enhance their organic production or trade activities.

e) Farmers are open for organic production

Especially among some young farmers, there is a great interest to learn how to manage a farm according to organic standards and principles despite the fact that the overall interest in farming is in decline. These farmers are open minded and eager to be part of training programs or organic stakeholder platforms.

f) New organic value chains under development

Although the cultivation of MAPs and the wild collection NWFP are the traditional activities of the organic sector in Kosovo, during the last years also stakeholders from the berry and the vegetable sectors could be convinced to pilot organic demo trials or to start the organic production. Also, here impulse from the international markets are the main drivers.

Besides, there is potential for more organic arable crops to export on international markets. This would allow farmers, who cultivate MAPs to plan proper crop rotations, including legumes for the fixation of nitrogen in soils.

Threats

a) Global economic and climate crisis can weaken organic sector development

Climate change and the current inflation tendencies have the potential to do significant economic harm of civil societies on a global level. Also, the main target markets for the exports of organic products are affected from this crisis. In the consequence, the purchase power of consumers may decrease and the willingness to buy organic products with price premiums might be limited as a consequence. This hampers not only the development of the prospects in export markets, it also limits the possibilities to establish a broader domestic market for organic goods.

The expected increase of drought and heavy rain periods make the production of any agricultural products more challenging. In tendency this could lead farmers believing the usage of conventional inputs is important to have a more secured and resilient production.

b) Low consumer awareness about organic production and products

In the past, little has been invested in Kosovo to promote the concept of organic farming to consumers. Consumers are therefore often unaware of what "organic" means in terms of food labelling respectively what organic agriculture means exactly. Without that knowledge consumers will not recognize a higher value for such products and the willingness to accept higher prices for organic products will be limited to few consumer groups.

c) Insufficient support and leadership of MAFRD

Stakeholders in Kosovo fear, that MAFRD is not supporting the organic agriculture sufficiently nor that it really takes the leadership in implementing the planned activities of the National Organic Action Plan 2018-21.

d) Lack of labor forces in rural areas

Stakeholders describe for all organic value chains (MAPs, Berries, Vegetables) that labor forces are increasingly leaving the villages and the agricultural sector. All three production sectors use labor intensive production methods. Besides, small farms as in Kosovo cannot use technical equipment to replace missing labor forces in the same way, as bigger farms can use such technologies. Especially young smart persons tend to migrate into the cities.

e) No / low price margins for organic products

Currently, conventional farms receive relative high prices for their products and therefore the additional margin for organic products is too low (e.g. in berry or vegetable production) to cover additional certification or production costs of organic agriculture. This could hinder the readiness of further farms to convert their production to organic agriculture.

f) High costs for organic certification and inputs

The certification costs for micro and small farms are extraordinarily high compared to bigger farms as the inspection and certification procedure is comparable regardless of the size of a farm. Also, the available inputs are quite expensive according to the stakeholder opinions.

What does it mean for policy and new NOAP?

Organic agriculture in Kosovo continues to struggle with major challenges. These include the small-scale structure of agriculture, the lack of simple and qualified workers on the farms, the lack of knowl-

edge and experience in organic farming, and the relatively high costs for the use of inputs or certification. In addition, there is a lack of sufficient research and advisory services from which organic farmers in Kosovo could benefit directly.

The landscape of organic stakeholders is scattered, financially vulnerable and strongly depending on financial support of donor programs.

It is expected that the donors will invest in the further development of the organic agriculture also in future as it provides the potential to create a higher income and would contribute to a rural development, where the agriculture is more resilient financially and ecologically.

However, the policy sector as well as the private sector would have to better exchange and collaborate to make support programs more effective. This also implicates a stronger ownership of the MAFRD in the process of implementing a new NOAP at all.

As a resort, MAFRD or Organika may invite stakeholders to regular working group meetings and coordinate the implementation of the planned measures of the new NOAP.

1.4 Sector needs

The workshops, surveys and focus group discussions that were preparing the NOAP identified the needs in the area of capacity development on farm, processor, trader level and service providers level.

The detail results of the workshops are presented in the annex in details in chapter 6.3.1 for the MAP sector, in 6.3.2 for the Berry sector and in 6.3.3 for the Vegetable sector. They are reflecting and mirroring the results of the SWOT in chapter 1.3.

On **farmer level,** the organic sector in Kosovo needs

- further financial support by donors and the government;
- systematic training, peer learning and coaching programs;
- awareness creation for organic production;
- the provision of sound market and production data; and
- insurances which would cover the losses in the transition periods to lower the risks for the farmers

On **processor and trader level,** the organic sector in Kosovo needs

- further financial support by donors;
- Training of farmers to how meet the required quality standards for organic processing; and
- Lobby and advocacy to consumers in Kosovo about benefits of organic products.

On **service provider level,** the organic sector in Kosovo needs

- Personal training of trainers and consultants;
- Exchange visit to organic producers in neighboring countries (exchange of experiences, practices, building up an international peer learning network);
- Familiarity with organic standards;
- Familiarity with organic production methods (fertilization, pest and disease management, weed management, crop rotation);
- Training materials for the organic production in farm and processing level; and
- Training about the availability and best application of organic inputs.

2. Scope of the NOAP and its development

2.1. The relevance of National Organic Action Plans internationally

Organic farming has evolved about 100 years ago in various parts of the world and has seen a big and ongoing growth in terms of organic production, processing, trade and consumption. IFOAM Organics International, the global umbrella of the organic movement differentiates between Organic 1.0 (the time of the organic pioneers), Organic 2.0 (the market development and the prescription of the organic practices in standards and regulations) and Organic 3.0[14]. The latter is the vision for the use of organic agriculture for sustainable development including the economic, social and environmental dimension and contributing to the Sustainable Development Goals (SDG). The organic agriculture approach is based on the principles of Health, Ecology, Fairness and Care. It sees itself as a production system based on tradition, innovation and science that promotes a good quality of life for all involved. In the majority of countries, organic regulations or national standards define details of production, processing and labeling against which operators can certify their production processes.

Since the mid 1990s, more and more countries developed ***National Organic Action Plans*** as an instrument to coordinate and boost organic sector development, to sharpen the stakeholder strategies and to guide policy setting. For instance, the EU commission passed the European Action Plan for Organic Food and Farming in 2004, 2014 and 2020 and also most EU countries have such plans. While many national action plans focus on governmental policies, the instrument is also used to highlight and plan civil society or private sector contributions. Those plans often identify targets e.g. in terms of the share of organic in the agriculture land. But they also build a strategic framework, they inform policy making and they identify needed investments and actions by the government and oftentimes also by other stakeholders.

Organic farming is innovative as such and requires taking a role of being a pioneer in the agriculture and food system. It is however still far from mainstream and requires attention of the governments to optimally use its private and public benefits as for instance expressed in the UN Sustainable Development Goals (SDG).

For organic being trustful, it requires value-oriented change of conventional practices including in the production, in the exchange relations, in support services, and in policy setting. Organic systems are on the one hand more resilient and more sustainable, and on the other hand they provide societal and environmental benefits. Transition to organic has however its risks and is knowledge intensive.

FiBL, the research institute for organic agriculture has extensively researched good practices of national organic action plan setting in the framework of an EU project and has issued in 2008 and updated in 2018 a manual for national action plan setting.[15] This manual providing good practice in Organic Action Plan development has supported this Kosovo NOAP.

The Republic of Kosovo has passed its first National Organic Action Plan for the period of 2018 to 2021 after a process of development of two years. The plan was developed under KOSAGRI project from the Italian Cooperation with the support of CIHEAM Bari in cooperation with the faculty of agriculture and veterinary of the university of Pristina. This first NOAP is now expired.

14 IFOAM Organics International, 2018, Organic 3.0: **https://www.ifoam.bio/about-us/our-history-organic-30**
15 FiBL, 2018, Organic Action Plans. Development, Implementation, and Evaluation, https://www.fibl.org/en/shop-en/1507-organic-action-plans

2.2. Functions of National Organic Action Plans

[16]Organic Action Plans have been used to a varied level of success. Where used effectively, they are an essential tool to coordinate within and between government, private sector and civil society to steer organic development. Organic Action Plans serve as a strategic instrument for governments and the sector as a whole to achieve policy goals. This is particularly important where multiple policy goals such as organic sector growth and development, economic, market and rural development and environment, public health and societal benefits need to be considered. Action plans can help create synergies and avoid contradictory policies whilst also ensuring that different measures are complementary. Furthermore, action plans allow specific bottlenecks to be better addressed and they enable broad stakeholder involvement in policy formulation. They depend on effective and inclusive forums to develop a strategic vision.

Appreciating the importance of public policy setting, the organic food and farming concept was however not developed by policy makers and technical experts responding to a specific policy need. Unlike many agri-environmental and rural development policies it has evolved as a social movement for agricultural change and is market-driven. The increasing demand for organic food highlights its potential as a viable business opportunity for agri-food stakeholders.

For policy makers, the challenge is to support a multi-functional organic food and farming systems approach, which can satisfy the varied goals and priorities of a diverse range of interest groups, and to do this in a 'public-private' partnership with Small and Medium Enterprises (SME) and civil society organisations. The overall objective is to balance supply-push and demand-pull initiatives to achieve sustainable development of organic agriculture.

Organic action plans have typically included targets for the proportion of agricultural land to be managed organically within a set time period, and in some cases for the proportion of the food market to be organic. In addition to this, action plans focus upon a combination of the following areas:

- Direct support for environmental and land management;
- Producer advice, training and education;
- Public procurement initiatives;
- Consumer education and promotion;
- Market development and infrastructure support;
- Research and innovation for organic farming;
- Support related to inspection and certification;
- Evaluations of the current situation and effectiveness of previous action plans, and procedures for monitoring impacts.

The Kosovo NOAP offers an insight into the history and status of Organic Agriculture in Kosovo. It identifies the needs, aims and actions to be undertaken for the promotion of long-term and accelerated development of organic agriculture. NOAP also contributes to raising awareness of organic agriculture among farmers, the general public, policy makers and donors thus creating additional interest towards this opportunity to sustainable development. It also contributes to the establishment of organic agriculture as an integral part of the national agricultural policy and rural development programs.

16 FiBL et. al., 2018, Organic Action Plans, Development, Implementation and Evaluation. https://www.fibl.org/fileadmin/documents/shop/1507-organic-action-plans_1.pdf

2.3. Lessons learned from Organic Action Planning worldwide

The FIBL Manual for Organic Action Planning[17] analyzed the experiences of the many action planning processes and makes a few conclusions that were applied in the preparation of this plan and need to be considered in implementation, monitoring and evaluation. Relevant international lessons include:

- Organic Action Planning needs to start with sector analyses and evaluation of earlier plans.
- Government plans need government's leadership. At the same time, stakeholder involvement in all stages is a precondition of sector ownership and implementation support to reach planned targets.
- The content of the plan needs relevance in relation to the stakeholder needs and commitment of the sector. Objectives and measures need to be specific, measurable and achievable. It also needs coherence to other policy instruments.
- Sufficient resources need to be allocated for the implementation of actions and for the management and monitoring of the plan.
- Success starts with planning but requires implementation and enforcement. Political will to follow the investment plans including of government and private sector is precondition that smart plans can succeed.
- A balanced approach to cooperation and competition on all levels is important. The domestic and international opportunities materialize if the market frameworks and structures are conducive to production and trade.

2.4. Lessons learnt from the National Action Plan 2018 - 2021

The broad evaluation of the NOAP 2018-2021 via survey and various workshops with overall about 120 participants, out of it about 60% farmers, 20% government, 10% private sector and 5% civil society (however only 1/3 were women and majority above 40 years old), revealed the main lessons, which are:

- Very high sector appreciation of the existence of a NOAP and the opportunity to participate in evaluation and development. Relevance was rated very high; however, promotion has been insufficient and many were unaware of the NOAP so far.
- The good quality of the NOAP presentation and its content creates trust and confidence for sector development. 60% of Stakeholders are willing to use the instrument for strategic purposes and 23% for information. Only 17% see no purpose in the NOAP.
- The purpose and function of the NOAP shall not be a donor menu to pick from, but a sector plan with commitments of the stakeholders to work into the same direction. The identified actions are not a wish, but part of institutional planning.
- Stakeholders appreciate a holistic approach and want to see measures with more or less equal priorities in all areas. Investments into direct payments to farmers and value chain facilitation are rated the important measures. Organic law enforcement is also equally important.
- Stakeholders underline that a good plan needs good implementation. They want higher investments in management, monitoring, transparency and accountability to stress that implementation is assured.
- It is important that all the institutions (e.g. government competent authority, certification, extension, input supplier, processing/trading, sector coordination etc.) function well, effective and efficient.

17 FiBL et. al., 2018, Organic Action Plans, Development, Implementation and Evaluation.

- So far, a lot of stress has been given to the export opportunity and export markets. While this should continue and opportunities well-explored, the domestic opportunities must not be neglected and be subject to new priorities. Diversification of production, availability on retail level and enhancing consumer demand are key for the national market development. A national logo would support that objective.
- Good performance and communication are key elements to convince the costumers in Kosovo and importers abroad. Trust and a good reputation, which are a precondition for market demand, need substantial investments.

2.5. Purpose, scope and limits of the Kosovo NOAP

NOAP is an official plan of the Government of Kosovo, hosted by the Ministry of Agriculture, Forestry and Rural Development (MAFRD). It is not a law nor an administrative instruction, but a tool to coordinate the sector and to assure coherent and synergetic actions in the country.

NOAP´s purpose is to provide information for policy makers and the public as well as to guide stakeholders in their activities. It highlights the opportunities that Organic Agriculture can provide in terms of income generation, resilience building, health and sustainability of agriculture and the food system. It underpins the collaborative nature between public and private development efforts. It invites national and international agencies to support the development for the well-being of the Kosovar people and finally to invest into a worldwide well-growing sector. It very concretely guides research, academia, extension, strategy developers, statistics and others.

NOAP is a contribution to the Green Report and to the Strategy for Agriculture and Rural Development 2022-2028 of the Government of the Republic of Kosovo, where the need for government measures to further organic agriculture is stressed various times and where this action plan is anchored.

The scope of the plan includes all organic production, processing, trade and consumption based on agriculture land, on livestock or on wild collection of Non-Wood Forestry Products (NWFP). While most production is for food, organic agriculture also includes agriculture production of body care products, textiles, construction materials, fuels etc. The scope also comprises allowed inputs for production, and it includes living plants and livestock. The plan embraces all persons concerned in the value chain, in the sector services and in consumption. It addresses persons presently assigned in Organic Agriculture formally and informally, those that potentially participate and those that benefit from the sector.

While not being a legal enforcement document, the Kosovo NOAP is closely linked to Law No. 04/L-085 on Organic Farming, which is drafted based on EU Regulations (EC) No. 834/2007 and No. 889/2008.

Based on the Administrative Instruction (MAFRD) No. 01/2019 on Duties, Responsibilities, and Composition of the Commission on Organic Farming, with the Decision of the Secretary General of MAFRD, the Commission on Organic Farming (COF) is established, consisting of nine (9) members: five (5) members from MAFRD and one (1) member from the Food and Veterinary Agency, one (1) member from the Faculty of Agriculture and Veterinary, one (1) member from the Ministry of Environment and Spatial Planning (MESP) and one (1) member from the Organic Agriculture Association of Kosovo (OAAK)[18].

18 There are intentions to hand over this representation to Organika, since OAAK might not exist anymore in the future.

2.6. Methodology of the NOAP 2023 -2026 development

The first NOAP expired end of 2021 and stakeholders from the government, the academia, the private sector and the civil society expressed the need for a new NOAP leading the future development. Caritas Switzerland, in the frame of the ADC supported SIRED program took the initiative in collaboration with MAFRD to support the facilitation of the process to evaluate the first NOAP and to develop a new NOAP 2023 – 2026.

The Kosovo NOAP 2023-2026, is based on the NOAP 2018- 2021. At the same time there are substantial innovation and adjustments in the plan expressing the further maturing of the still quite infant but well-growing sector. The new NOAP reflects the lessons learned from the organic policy successes and challenges in the past, the intensified participation of the growing sector stakeholders and the new policy priorities of the presently elected government.

The process of the NOAP development was conceptualized into a) the evaluation of the expired NOAP, b) the development of a new draft NOAP balancing the learning of past experience and creating convening power and c) quality assurance though reality checks for future targets and plans and through ownership building among stakeholders.

The evaluation, the draft development and the quality assurance/ownership building included the following methodology:

a. an online survey with closed quantifiable questions and open questions for individual feedback;
b. focus group discussions (e.g. pickers, farmers, inspectors, researchers, NGOs etc.);
c. "VIP" interviews allowing people from both gender and from various roles and interests to express their opinions in order to triangulate the views;
d. Evaluation results and policy development workshops at the MAFRD level;
e. Public consultation of the NOAP draft with written statements and broad stakeholder workshop for feedback, awareness, NOAP promotion and ownership.

Figure 7 visualizes the process and its steps.

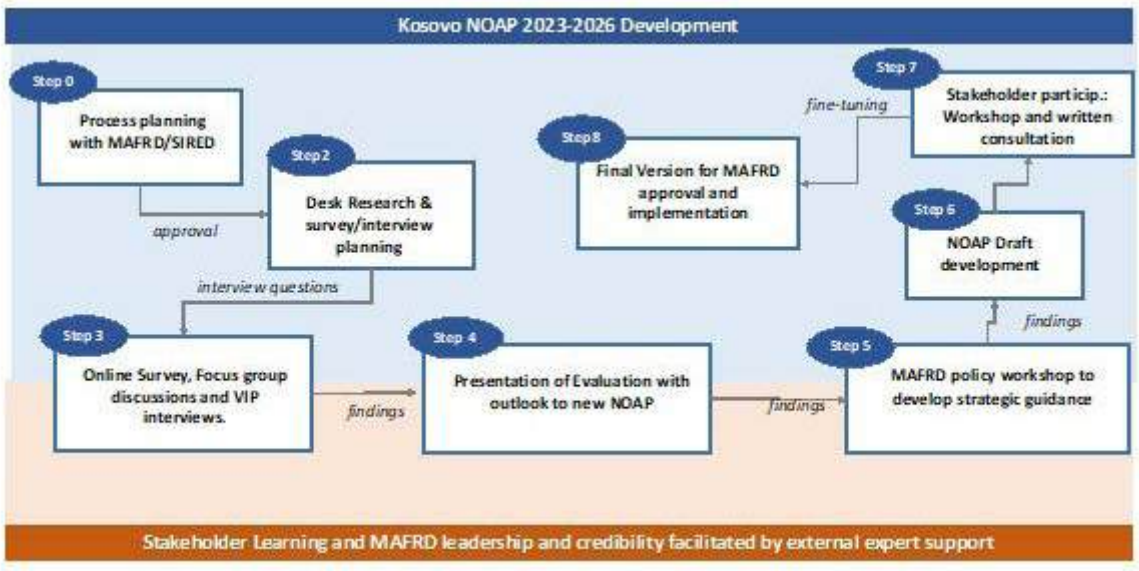

Figure 7: Overview of the 8 methodological steps of the proposed process involving also opportunities for stakeholder learning.

A special emphasize in the preparation of NOAP 2023-2026 is given to stakeholders' participation. The aim has been to bring out the main needs of organic agriculture that are now included in the NOAP. The plan envisages the role and involvement of each stakeholder varying on their interest.

In meetings with focus groups and VIPs, the main points that were discussed were: 1) sector development update, what has happened in the organic sector since 2017 from different perspectives, including important events, important frameworks, changes, business developments, and experiences; 2) NOAP 2018-2021 evaluation, including whether the NOAP was helpful, and which NOAP objectives were met, and what which not 3) sector analysis and SWOT analysis of Kosovo's organic sector and 4) new policy wishes for NOAP.

This has made it possible to identify the actors responsible for the implementation of actions and the possible sources of funding, together with a timeframe for the implementation and indicators for NOAP monitoring.

3. Vision 2027 and objectives

Kosovo aims at a fully functional, successful, sustainable, and nationally and internationally well-renowned organic food and farming sector. An increasing number of stakeholders including farmers and businesses produce accessible, environmentally sustainable organic food, drinks, textiles, and other organic products for the local and export markets. Relevant and high-quality services such as sector coordination, match making e.g. in trade fairs and internet platforms, certification, advisory services, research, laboratory services, education and promotion support the value chain actors. Fair and well implemented rules and regulations are in place.

The Kosovo organic sector is made up of businesses that are profitable, that provide fair wages and that have good working conditions for all. They have access to excellent market intelligence to inform their decision-making processes. Those working in, or wishing to enter the Kosovo organic sector have high levels of skills and knowledge about all aspects of their business.

The operators collaborate with smart and united structures e.g. cooperatives of smallholders for processing and marketing, national commodity promotion bodies and national organic umbrella organizations.

The universities and development agencies support with research and extension focusing on practical application for increasing productivity and profitability. They release generally untapped yield potential in organic systems and stimulate innovations. Colleges, universities vocational training institutions and third parties provide training to increase skills levels including for good agriculture practice and entrepreneurial skills, and they bring new people into the organic sector.

A small range of Kosovan Organic products with comparative advantages such as medical and aromatic plants (MAP), berries and honey are exported in an excellent quality with reliable traders. The domestic market has a broad offer of local products from local producers that grow well in Kosovo (e.g. vegetables, cereals, oils, temperate fruits, nuts, dairy products, eggs, meat etc.), in which consumers trust with good reasons. The domestic market includes products that can't be produced and/or processed in Kosovo (e.g. coffee, rice, tropical fruits etc.) sustainably and need to be imported.

Consumers are well aware about the organic concepts, they have forums and organizations that critically observe the supply of the market and they have good information sources regarding process and

production. They benefit from a good offer and availability of demanded products of good quality, which are fairly priced.

Kosovo organic farming further improves its ability to conserve and enhance the natural capital as organic farmers learn more about the impact of their work on biodiversity, soil, air and water, and modify their activity in response to research findings. In turn, the conservation and enhancement of natural capital builds a more resilient food system for Kosovo and conserves an environment for future generations. An increase in the proportion of land managed organically will ultimately help to reduce global greenhouse gas emissions and contribute to biodiversity.

To get closer to this vision, Kosovo has the following overall objectives until end of 2026

"A well-functioning Kosovo organic production on a relevant and increasing area supplying the domestic and export markets with attractive producer prices and satisfying the demand of consumers. The market has suitable framework conditions and offers supporting services to further grow and to develop qualitatively."

The overall objective translates into objectives in 4 areas, which are detailed in chapter 4.1.

4. Strategy and action plan

4.1. Strategic plan

Kosovo has a holistic strategy of developing the organic market looking at all its aspects including the production, processing, trade and consumption as well as regulations and supporting services with a Market System Development (MSD) view (see figure 8). The strategy identifies four pillars of measures, which interact closely: A) Production and Processing B) Market facilitation C) Legislation, certification and policies and D) Research, education, training and extension.

We assume that if the organic sector has

- productive and profitable operations compliant with organic regulations;
- operations that are managed in line with organic principles and are therefore truly sustainable;
- transparent markets with informed suppliers, customers and market facilitators (statistics and rules);
- well accessible and attractive knowledge products for all parties (consumers, operators and governments/NGO);
- clear rules that are understood and accepted by the stakeholders;
- enforced rules for actors inside and outside the sector to protect integrity;
- access to new evidence and inspiration for innovation; and
- relevant learning opportunities on all levels,

the organic market will grow rapidly, provide growing income along the value chain, create consumer benefits and help sustaining agriculture and its social and natural environment. Based on this impact hypothesis the action plan in chapter 4.2 details 4 activity areas and 19 measures to influence development towards the above described objective and vision.

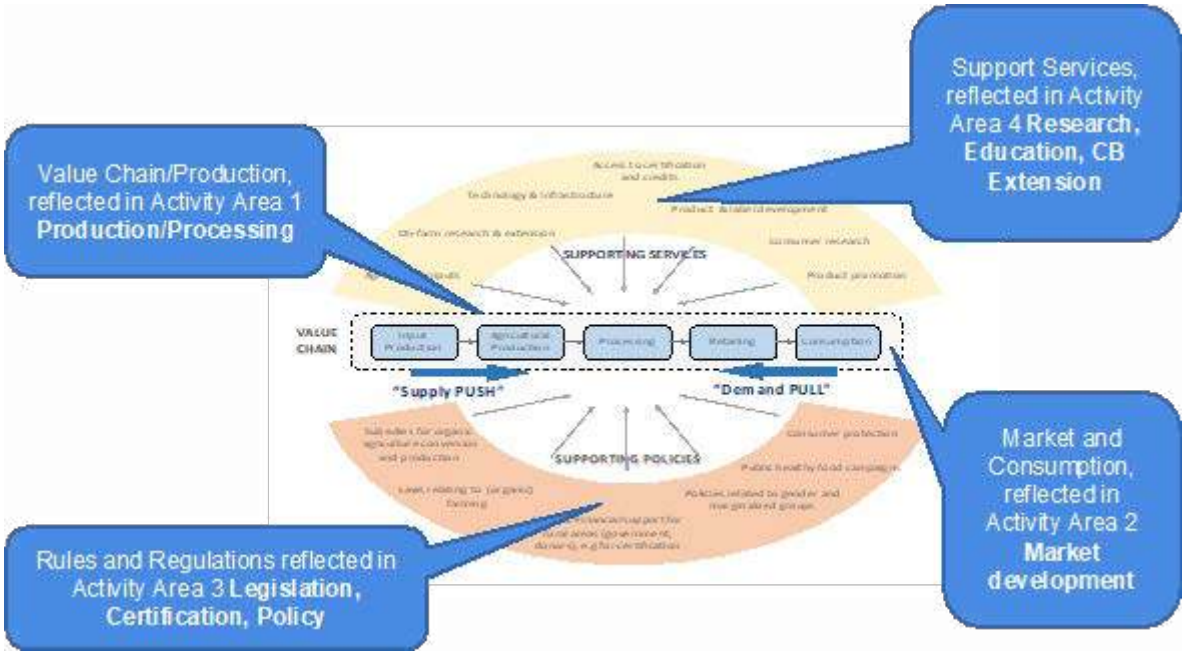

Figure 8: The so called "donut", visualizing the organic market with the 4 strategic activity areas. (source donut: FiBL)

Activity area A: Production and Processing in the organic sector

Objective:

More operators produce on bigger areas more demanded agriculture products improving productivity, profitability and sustainability of the resources.

Strategy

Kosovo supports organic operations with subsidies for inputs, for certification and conversion, for land cultivation and infrastructure development.

Indicators and Targets by 2026 compared to 2022

- Certified organic agriculture land grows to 2500 ha (2020 1600 ha) and wild collection stabilizes at 350 000 ha (2020 373 kha)
- Average yield increases 10%
- Organic livestock increases 10%
- The number of organic operators increases to 150
- Operators have access to required inputs and services

Activity area B: Market development

Objective

A growing and more transparent domestic and export market.

Strategy

Governance and facilitation of the market and value chain along the MSD "donut" (see figure 8). The government invests in public consumer information (permanent website and information campaigns).

It prepares and presents statistics for governance and for informing market participants, which are published annually. It analyses, assesses and reflects the key performance indicators and challenges of the market annually including for export and domestic trade. To facilitate trade, it issues an organic product logo based on certification. And it creates and publishes an organic directory, division of organic operators and supporting services.

Indicators and Targets by 2026 compared to 2022

- Introduction of organic public and anonymous cumulative statistics reflecting all NOAP indicators (areas, producers, crops, livestock, exports, consumer purchases, market data, certification data);
- Growth in all indicators of minimum 5% p.a.;
- National organic logo increasingly (+5% p.a.) known reaching brand recognition and brand recall of 25%/50% of people in Kosovo;
- Trust in national organic logo grows by 5% p.a.;
- Increased number of points of sale for organic products (# of outlets with >30 organic products).

More details see the action plan table 9 below.

Activity area C: Legislation, certification and policies

Objective

The organic sector benefits from supporting policies and investments as well as from enforced organic regulation.

Strategy

The Kosovo Government invests in development and implementation of organic supporting policies[19] and in development and enforcement of the organic legislations with insiders and outsiders of the sector. It accredits the certification bodies and laboratories and exchanges with the private sector and the civil society. It maintains international relationship with other organic competent authorities abroad. It monitors and evaluates the NOAP development and decides if corrective measures are necessary. And it mainstreams its organic policy as coordinated in this NOAP in other national and local policy documents.

Indicators and Targets by 2026 compared to 2022

- NOAP promoted, implemented >90%, and monitored. Results are annually (2024, 2025, 2026 and 2027) assessed and publicly reported;
- Government and donor expenses for the organic sector increase including for governance, farmers payment, promotional programs and research/extension expenses;
- The Kosovo organic regulation - adapted either in line with EU organic regulation or purposely different - is well positioned for the local market;
- Certification bodies are formally accredited;
- A stable number of non-conformities per operator in certification;
- Enforcement of organic legislation also in livestock and also with non-certified actors that are using the term organic.

19 IFOAM Organics International provides a supporting policy toolkit: https://www.ifoam.bio/our-work/how/regulation-policy/global-policy-toolkit

More details see the action plan table 9 below.

Activity area D: Research, education, training and extension

Objective

Effective and need based adaptive research, quality information dissemination, operator coaching and education is available.

Strategy

Innovation is promoted through research, education, training and extension. Research projects focus on the biggest needs of the sector to transfer international organic evidence/technology etc. to the Kosovo operations and to adapt production practices to local conditions in existing and new opportunity crops. Training also concerns general education and their curricula for consumer information and for vocational education for future organic professionals. The government and universities assure a national coverage of extension agents with organic competences. They also promote and support demonstrations for operators to show good agriculture practices and their impacts. The sector actors have the opportunity to participate in training. Once a year, a sector actor conference is held among others to create cooperation networks between MAFRD, researchers, associations, and farmers. There should be monthly meetings to exchange for the latest developments and technologies in organic agriculture.

Indicators and Targets by 2026 compared to 2022

- Access to quality advise for all operators;
- Access to information for consumers;
- Well-structured and performing institutional landscape (NGO and GO) of the organic sector;
- Organic is part of formal education curricula.
- More details see the action plan in chapter 4.2.

4.2. Action plan

The Action plan in table 8 details the measures that are required to achieve objectives and targets. For each activity area/objective there are 4 – 7 action lines that require due attention. While the MAFRD takes the responsibility for NOAP as a whole including overall coordination, monitoring and government actions, many action lines are under the lead of stakeholder institutions. They report to MAFRD and at the same time advocate for further NOAP development. MAFRD itself reports to the government and public through direct channels or the media its investments and achievements.

The NOAP identifies 19 Action Packages in the four areas, which are:

Activity area A: Production and Processing in the organic sector

A1 Subsidies for inputs

A2 Subsidies for certification and conversion

A3 Subsidies for land cultivation

A4 Infrastructure development (subsidies for investments)

Activity area B: Market development

- B5 Public communication and promotion (consumer information
- B6 Organic statistics and market information for operators
- B7 Value chain facilitation
- B8 Export promotion

Activity area C: Legislation, certification and policies

- C9 Organic law enforcement including CB accreditation for the certification against the national organic law.
- C10a Organic law revision adapting to the EU or
- C10b Organic law revision with an own strategy
- C11 Introduction of Kosovo Organic Logo for the domestic market
- C12 NOAP management, monitoring and enforcement.
- C13 Organic policy development and mainstreaming organic in overall Kosovo food system and education policies

Activity area D: Research, education, training and extension

- D14 Organic applied research
- D15 Adequate management of extension services and proper competence for organic advice for farmers.
- D16 Facilitation and networking of organic institutions in Kosovo and internationally
- D17 Capacity building in the organic sector
- D18 Integrate education about sustainable food, agriculture and organic systems
- D19 To strengthen the cooperation with international agencies.

Table 9: Action Plan

4.2.1 A Production and processing of the organic sector

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
1	Availability of required and suitable inputs for farming & processing	Subsidies for inputs.	Subsidies inputs on the market for products on the positive list with demand (seeds, biopesticides, organic fertilizers, pheromones, etc.)	MAFRD, Donors, Cross Border Projects	MAFRD	Caritas CH, GIZ, CNVP, PPSE, IADK, Organika, Private, Companies	List and number of subsidized products. Sales of products. Subsidy budget	MAFRD
2	Unaffordable costs for farmers for conversion and certification	Subsidies for certification and conversion	Support of new farmers in process of conversion and for certification, risk reduction support	MAFRD, Donors	MAFRD	Municipalities	50 farmers are estimated for the Calendar Year 2023 starting the conversion procedure.	MAFRD
3	Limited area of agricultural (cultivated) organic land.	Subsidies for land cultivation	Support of farmers for the land cultivation	MAFRD, Donors	MAFRD	Municipalities	About 2500 ha, in conversion/under organic agriculture by 2026.	MAFRD
4	Insufficient and inadequate infrastructure.	Infrastructure development (subsidies for investments)	Investment in physical assets as dedicated measure for organic sector	Donors	Farmers & companies	Caritas CH, GIZ, CNVP, PPSE, IADK, Organika	New storage Facilities, New packaging facilities.	MAFRD

4.2.2 B Market development

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
5	Insufficient public communication and promotion on organic sector.	Public communication and promotion (consumer information).	1. Information Website explaining organic with attractive media; Information through media (social, tv, radio etc.); 2. Preparation of promotional materials for organic ag and labels 3. Multiplier information and animation (consumer associations, schools, vocational schools, retailers, NGO etc) 4. Information campaigns with partners and events. 5. Including curricula from the kindergarten to the universities;	MAFRD and donors	MAFRD, Organika	Ministry of Trade Companies, Media, Donors, NGOs, Schools etc.	Label recognition and trust, Survey about organic principles knowledge	MAFRD
6	Insufficient market information of operators.	Organic statistics & Market information for operators	Organic statistics including areas, production, operators, trade and consumption. Annual media report Market analyze reports and opportunity analyses (e.g. demand) for export and domestic markets BtoB information Website and newsletter with success stories	MAFRD, Ministry of Trade	MAFRD, Ministry of Trade	Caritas CH, GIZ, CNVP, PPSE, IADK, Organika, Companies, Certification bodies	Organic statistics and growth data Availability and dissemination (downloads) of reports, use of Website and subscriber of newsletter	MAFRD
7	Lack of knowledge and support for value chain	Value chain facilitation and capacity building	Increasing the knowledge and strengthening linkages between stakeholders' companies. Promote membership in associations and exchange Business development services training program Support of national trade fair and its participation	Ministry of trade, MAFRD	Organika, private sector	Caritas CH, GIZ, CNVP, PPSE, IADK, MAFRD, Ministry of Trade	Organika Members, trade fair participation, participation in key training event	MAFRD
8	Limited visibility at international fairs and unsatisfactory reputation for Kosovo organic	Export promotion	Participation in various international fairs for the recognition of Kosovo organic products worldwide. Presentations and promotion.	Ministry of Trade MAFRD	Organika, private sector	MAFRD, Caritas CH, GIZ, CNVP, PPSE, IADK, Ministry of Trade	Support to export companies and to increase the support for participation in different international fairs	MAFRD

4.2.3 C Legislation, certification and policies

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
9	Fraud and lack of Organic law enforcement. Lack of trust in organic claim	Organic law enforcement	Capacity & resources in competent authority Accreditation of CBs for local market Identification of violation and fraud sources. Prioritization. Awareness for incompliances and counseling for improvements in compliance of production and labeling. Prosecution of law incompliances Feeding experience in law development To monitor implementation of Organic law and administrative instructions	MAFRD	MAFRD	Certification bodies (for clients only) Consumer association Organika	Report for the law enforcement	MAFRD
10a	New EU regulation and need for Adaptation of the own legislation for organic agriculture according to the EU	Organic law revision adapting to the EU	Legislation process to adapt the organic law to EU. Develop the administrative mechanisms and procedures. Create labs and other capacity to handle EU requirements Training of stakeholders and instruct CBs.	MAFRD	MAFRD	CBs, Organika	Recognition by EU	MAFRD
10b	New EU regulation without chance for equivalence	Organic law revision with an own strategy	Organic sector strategy development and capacity building for organic law instruments to apply guided by strategy Law revision process Training of stakeholders and instruct CBs.	MAFRD	MAFRD	CBs, IADK, Organika, Caritas CH, GIZ, CNVP, PPSE,	Own objective achievements	MAFRD

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
11	Lack of Kosovo logo for organic products.	Introduction of Kosovo Organic Logo for the domestic market	Create new logo for the Kosovo domestic market in a participatory process. Implementation of process, adequate organization and management of control integrated in the certification system. Fraud prevention and prosecution. Based on Administrative Instruction No. 07/2019 on designation of the organic production logo and specific requirements for labelling	MAFRD,	MAFRD or Organika[20]	Operators, CBs, Caritas CH, GIZ, CNVP, PPSE, IADK, Organika,	Time of Logo introduction Use of logo (registrations) Trust in logo by consumers	MAFRD
12	Proper NOAP Management	NOAP management, monitoring and enforcement.	Proper planning, implementation and monitoring of NOAP Yearly meetings with main stakeholders in organic sector to identify shortcomings Ensure continuous follow-up of NOAP from responsible stakeholders	MAFRD Caritas CH	MAFRD	All stakeholders	Annual report comparing achieved results with objectives and indicators.	MAFRD
13	New policy needs and incoherence in main policies	Organic policy development and mainstreaming organic in overall Kosovo food system and education policies	Identify issues in organic sector (opportunities and threats) Observe policy revision opportunities in Kosovo such as direct payments or agriculture strategy. Lobby for mainstreaming OA	MAFRD	MAFRD	Organika, IADK	Policy successes	MAFRD

20 MAFRD if it will be a Government logo (as e.g. in the EU) and Organika if it will be a private sector logo (as e.g. in Switzerland)

4.2.4 D Research, education, training and extension

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
14	Lack of local knowledge about organic practices	Organic applied research	Identify stakeholders' research priorities and needs Support for research projects on organic agriculture. To promote applied research on organic agriculture and relevant connected topics.	MAFRD Research projects, Universities	MAFRD	MEST MAFRD, Organika, IADK Universities, Institutes, FiBL, CIHEAM-Bari, University of Kassel, University of Wageningen	Research priority plan Organic research underway and completed	MAFRD
15	Lack of organic extension/ advisory services and demonstrations	Adequate management of extension services and proper competence for organic advice for farmers.	To enhance capacities of extension services for transfer of knowledge in organic farming.	MAFRD, (ARDP) Donors	MAFRD (extension service department) and contracted private companies, TAIEX	IADK, NGOs, researchers	training courses, demonstrations, organic farmers with access to advice. Satisfaction of farmers.	MAFRD
16	No common sector processes. Sector not well linked internally and internationally. Weak umbrella	Facilitation and networking of organic institutions in Kosovo and internationally	Sector structure and regular meetings of working groups. Initiatives. Annual sector event Membership in IFOAM, MOAN and other key institutions To be included in European research networks Exchange visit to partner institutions in Europe Relevant participation in BIOFACH and Organic European, Mediterranean and World congresses	Sector contributions, donors	Organika	MAFRD, Caritas CH, GIZ, CNVP, PPSE, IADK,	Participation in events. Memberships	MAFRD
17	Insufficient capacity on individual, institutional and sector levels	Capacity building in the organic sector	Capacity building program for business development services on individual, institutional and sector leadership level	Sector institutions, MAFRD, donors	Organika	MAFRD, IADK, Caritas CH, GIZ, CNVP, PPSE, Local NGO- and Associations, Training service providers	Training days on individual, institutional and sector levels	MAFRD

#	*Issue*	*Action package*	*Action description/ Action-points*	*Budget source*	*Lead/ Responsibility*	*Support/ Participation*	*Indicators*	*Monitoring*
18	Insufficient organic curricula in schools, vocational education, and Universities	Integrate education about sustainable food, agriculture, and organic systems	Introduce curricula for schools, vocational schools, Universities, and non-formal education. Supporting documents for teaching and teacher training. Specialized Vocational and University courses	MED, donors	MAFRD, MED	Universities, High schools, MAFRD, MED. IADK, Organika, CBs	New & updated curricula New teaching materials Qualified teachers Trained students on all levels	MAFRD
19	Capacity building & sector facilitation of international agencies	To strengthen cooperation with international agencies	To visit different European/Regional countries involving private/public experts, and student exchanges.	MAFRD, Donors	IADK, Organika	Caritas CH, GIZ, CNVP, PPSE, OAAK, CBs	New curricula New teaching materials Qualified teachers	MAFRD

5. Appendices

5.1. SWOT summary

Strength (23 enumerations)	Opportunities (21 enumerations)
• The organic sector in Kosovo is continuously growing • Organic farmers and processors getting better equipped • Farmers have gradually strengthened their technical capacities	• Favorable natural conditions and political willingness to support the organic sector • Donor programs are supporting organic agriculture financially and technically • Capacity building programs could strengthen the technical capacities • International demand for organic product • Farmers are open for organic production • New organic value chains under development
Weaknesses (53 enumerations)	**Threats (22 enumerations)**
• Still low level of technical capacities among organic operators • Lack of inputs • Weak extension service for organic farms and less research in organic agriculture • Small scale farms don't allow the effective use of modern technologies	• Global economic and climate crisis can weaken organic sector development • Low consumer awareness about organic production and products • Insufficient support and leadership of MAFRD • Lack of labor forces in rural areas • No / low price margins for organic products • High costs for organic certification and inputs

Source: Online Survey among organic stakeholders in Kosovo, 2022

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Organika (2019): Assessment of Non-Wood Forest Product and Medicinal and Aromatic Plant Sector.

Richter, T, I. Kampermann, B. Pulai (2020): Export potential of Organic Berries and MAPs from Kosovo to Germany, Switzerland and Austria. Top Line Report.)

5.3. Legal references

The **Law No. 04/L-085 on Organic Farming** was constructed pursuant to the Council Regulation (EC) No. 834/2007 on organic production and labelling of organic products, and the Commission Regulation (EC) No. 889/2008 laying down detailed rules for its implementation. Eight Administrative Instructions (AI) were elaborated for the efficient implementation of this Law. The Tables of Concordance constituted the guidelines for the Administrative Instructions, which explain the procedures for the approximation and alignment with the EU Legislation. The Minister of the MAFRD had signed the Administrative Instructions on 17th January 2019, and the AIs were published on the Ministry's website.

The Administrative Instructions read as follow:

- AI No. 01/2019 on duties, responsibilities and composition of the Commission on organic farming;
- AI No. 02/2019 on organic production control system, Control Authority, control bodies and the rules for their implementation;
- AI No. 03/2019 laying down the rules for organic plant production;
- AI No. 04/2019 laying down the rules for organic livestock production and feed;
- AI No. 05/2019 laying down the rules on organic aquaculture production;
- AI No. 06/2019 on criteria, standards and conditions for imports of organic products in Kosovo;
- AI No. 07/2019 on designation of the organic production logo and specific requirements for labelling;
- AI No. 08/2019 laying down the rules for production and methods for organic processed products.

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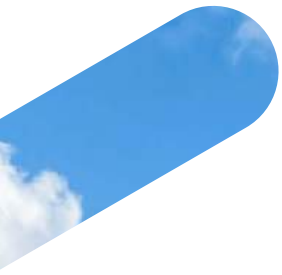

REPUBLIC OF MOLDOVA

MINISTRY OF AGRICULTURE AND FOOD INDUSTRY OF REPUBLIC OF MOLDOVA

THE ORGANIC ACTION PLAN OF THE REPUBLIC OF MOLDOVA

2024 – 2027

November 2024.

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ABBREVIATIONS

MAFI	Ministry of Agriculture and Food Industry of the Republic of Moldova
NSARD	National Strategy for Agriculture and Rural Development 2023-2030
CB	control body
ODA	Organization for entrepreneurship development
ARAC	Agricultural and Rural Advisory Centre
AIPA	Agency of Interventions and Payments in Agriculture
MF	Ministry of Finance
MER	Ministry of Education and Research
NFSA	National Food Safety Agency
NAIP	National Agency for Intellectual Property

1. INTRODUCTION

1.1. General overview

On 23 June 2022, the European Council granted the Republic of Moldova candidate country status for EU membership. In December 2022, the Republic of Moldova developed and approved a coordination mechanism for the accession process of the Republic of Moldova to the European Union, aligned with the Copenhagen criteria and comprising 35 negotiation chapters. This mechanism was improved in 2024 to meet the requirements of the accession negotiations.

On 25 June 2024, the first Intergovernmental Conference (IGC) on the accession of the Republic of Moldova to the European Union took place, an event that officially marked the start of accession negotiations. During the first IGC, the Government of the Republic of Moldova stressed that: "***The Republic of Moldova aims to achieve the level of national readiness to align its legislation with the EU acquis and become a member state by 2030***."

The development of organic farming sector is a major priority on the Ministry's Agenda, placing increased emphasis on the transposition of the objectives, principles and community norms applicable to organic production in the relevant national legislation, as it is outlined in the National Strategy for Agriculture and Rural Development 2023-2030 (NSARD), approved by Government Decision No. 56/2023. To materialize the implementation of the Strategy, the Ministry for Agriculture and Food Industry of the Republic of Moldova is compiling the Strategic Program for Agriculture and Rural Areas in compliance with Regulation (EU) 2021/2115. Three priority directions are outlined in the NSARD 2023-2030 regarding the Green Deal objectives, namely:

1. Implementation of technologies and measures to reward the use of bioeconomy and circular economy principles.
2. Supporting and strengthening environmental protection, by using environmentally friendly techniques (biological control, conservative-regenerative techniques, organic farming etc.).
3. Biodiversity conservation, water and soil protection.

Within the NSARD 2023-2030, the role of organic farming sector is outlined in the overall objective 1. *Strengthening the potential of the primary agricultural sector and promoting smart, sustainable and climate-resilient agricultural practices*, with priority directions for supporting and strengthening environmental protection through biodiversity conservation, water and soil protection and promoting the use of ecological agricultural practices. Thus, NSARD 2023-2030 will facilitate the development of agriculture with reduced environmental impact and the increase in the development indicators of organic farming, thus contributing to achieving Goal 10 of the 2030 NDS – Ensuring the fundamental right to a healthy and safe environment.

1.2. Status of organic farming sector in the Republic of Moldova

The Republic of Moldova possesses favorable climatic conditions for the development of organic agriculture. However, progress in this sector has yet to reach its full potential. If in 2017 the total area of land certified under the organic system was 75 686.1 ha, but by 2019 it was reduced to 28 546.6 ha, of which 22.1 thousand ha were certified organic, while 6 365 ha were in conversion (Figure 1). Thus, only 1.1% of the agricultural area of the Republic of Moldova was cultivated in the organic system. In comparison, the EU average is 8.5%, and the European Commission aims to increase this share to 25% by 2030.

According to data from the reports submitted to MAFI by CBs, in 2023 there were 158 operators registered, mostly farmers. The total area of certified land was 41 477.37 ha, representing 1.9% of the total UAA with an additional 6 531.26 ha designated of wild collection.

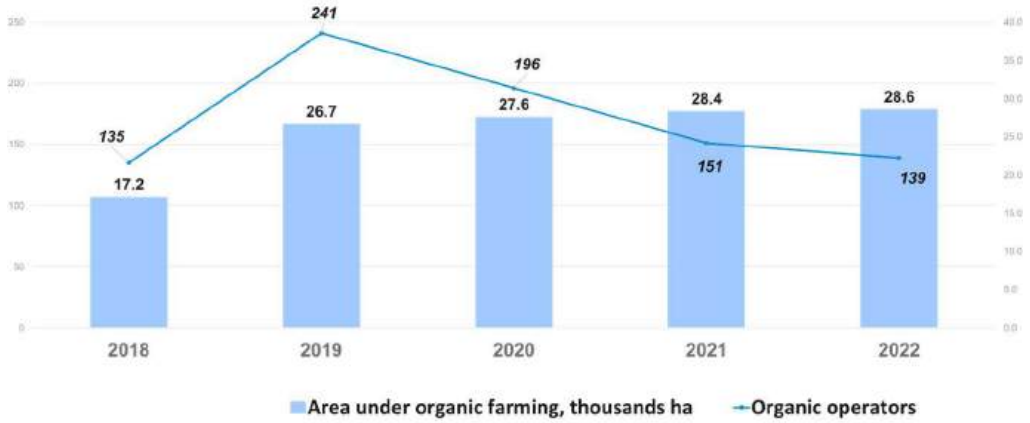


Fig. 1. Development in total organic farming area and number of organic farms

In the Republic of Moldova, organic production is mostly focused on annual cereal crops, but also on the cultivation of nuts, dried fruits, sunflower seeds and oil, leguminous crops, such as soybeans, peas, and on the production of organic wine. Among medicinal and aromatic plants, the most widespread crop in organic agriculture is lavender, a much more modest situation is registered regarding organic vegetables.

According to data on the producers engaged in the value chain of organic agriculture in the Republic of Moldova by location, most organic agricultural holdings are in the North (50%), with a smaller share in the Center (33%) and South (17%) regions of the Republic of Moldova.

The type of activity of the economic entities included in the value chain of organic agriculture is: production, processing, animal husbandry, trade and collection. The increased interest up to 21.5% in the processing activity in 2022 (compared to 2021-12.8%) is encouraging, so the raw material produced in the country will be of added value.

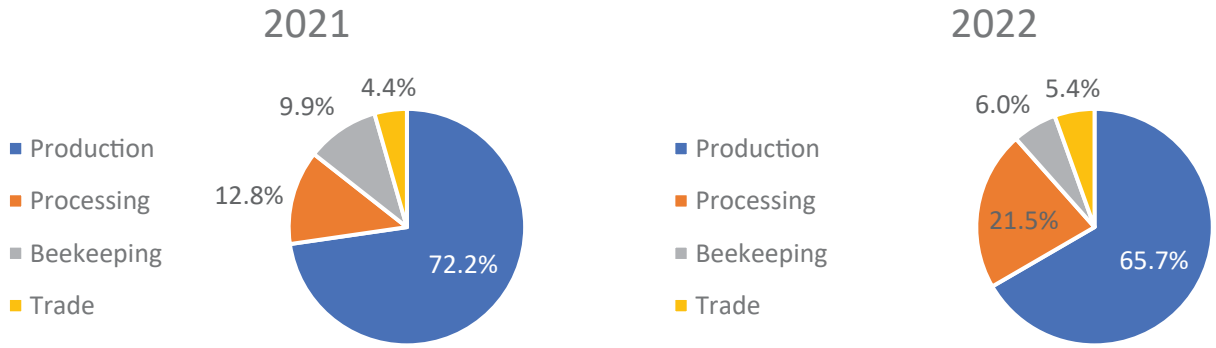


Fig. 2. Agricultural lands in organic farming system

In recent years, the organic system has become increasingly attractive for farmers in the conventional livestock sector. Beekeepers, many of whom became certified organic three years ago, are increasingly interested in transitioning to the organic system.

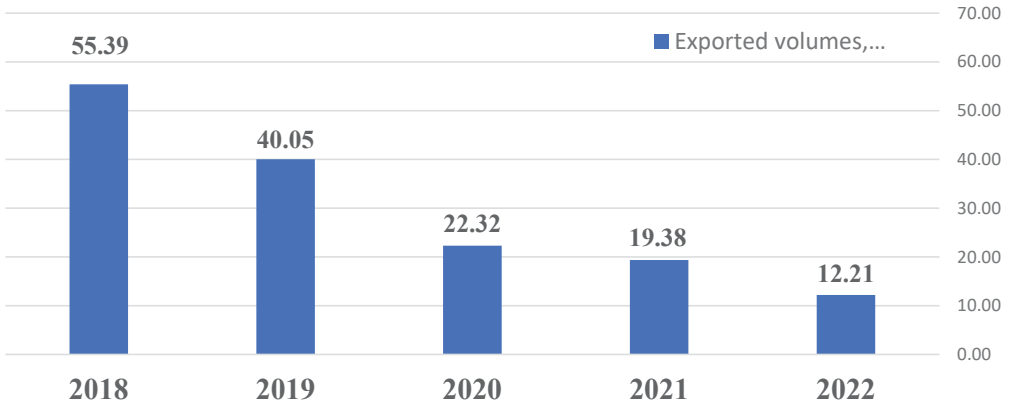


Fig. 3. Export volumes of organic goods from the Republic of Moldova to EU

The demand on the internal and external market for organic products dictates the increase of areas in the organic system and the diversification of organic certified products. This trend towards a healthy lifestyle encourages farmers from the conventional system to convert to the organic system of production. Strong consumer interest, political support measures, including a good regulatory framework, are essential to achieve this goal of increasing agricultural areas in an organic system.

The Republic of Moldova places a strong emphasis on the organic farming system, as reflected in its sectoral development policies and upcoming subsidy programs. Organic farming has the potential to significantly contribute to a sustainable food and agricultural sector, while satisfying citizens preferences. However, large-scale conversion to organic farming requires greater ambition in agricultural policy to support more farmers to make the necessary additional efforts and investments. With the right incentives more farmers could make an even greater contribution to the environment, climate and rural communities.

1.3. Legislation, degree of alignment with EU acquis

On July 31st 2023, the Parliament adopted ***Law No. 237/2023*** *on organic production and labelling of organic products* in its second reading. This law is partially aligned with the primary EU act – Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007. However, Regulation (EU) 2018/848, has been fully transposed by 3 national regulatory acts.

Law No. 237/2023 establishes the principles of organic production and the rules on organic production, related certification and the use of indications related to organic production in labelling and advertising, as well as the rules on additional controls related to the production and labelling of organic products. At the same time, the document aims to grant subsidies to stimulate the development of organic farming, through the National Fund for the Development of Agriculture and the Rural Environment, and for the purpose of collecting and exchanging data related to the activity in the field of organic agri-food production, the operation of an electronic information system is provided.

Following the alignment process with EU legislation, 18 EU delegated and implementing regulations were transposed in 5 Government Decisions as secondary normative acts implementing the provisions of Law No. 237/2023, which covers three main areas: production and labelling rules, controls and trade regime:

Government Decision (GD) No. 253/2024 *on detailed rules on organic production, retroactive recognition of conversion period, and products and substances approved for use in organic production*, transposed 4 EU acts:

1. Annexes II, III and IV of the Regulation (EU) 2018/848
2. Commission delegated Regulation (EU) 2020/2146
3. Commission Implementing Regulation (EU) 2021/1165
4. Commission Implementing Regulation (EU) 2020/464.

The draft Government Decision was approved on April 10th, 2024. This regulatory act established 2 regulations, outlining detailed rules for organic plant production, livestock production, algae and aquaculture animals production, processed food and feed, wine, yeast used as food or feed, as well as rules on collection, packaging, transport and storage of organic and in-conversion products. It also establishes exceptional production rules in the event of catastrophic circumstances, rules on products and substances approved for use in organic production, rules on the procedure and documents required for the retroactive recognition of previous periods for the purpose of conversion to organic production, as well as rules on the exchange of certain information.

Government Decision (GD) No. 252/2024 *for the approval of Regulation on production and marketing of plant reproductive material of organic heterogeneous material of certain genera or species,* which transposed the Commission Delegated Regulation (EU) 2021/1189.

The draft Government Decision was adopted on April 10th, 2024. The national regulatory act lays down rules on the production and marketing of plant reproductive material of organic heterogeneous material in accordance with Law No 237/2023 on organic production and labelling of organic products, consisting of seed material of varieties of agricultural plant and vegetable species, vegetable propagating material other than seed, propagating material of ornamental plants, vine propagating material and fruit propagating material.

Government Decision No. 433/2024 *regarding the system of control and certification in organic production, the recognition of control bodies and the supervision of their activities*, transposed 9 EU acts:

1. art. 36 (1) letter (g) point (i) – (viii), letter (h) point (i)- (xii), (2) letter (a)- (h), art. 40, art. 46 and annex VI of the Regulation (EU) 2018/848
2. Commission Delegated Regulation (EU) 2021/1698
3. Commission Delegated Regulation (EU) 2021/1342
4. Commission Implementing Regulation (EU) 2021/1935
5. Commission Implementing Regulation (EU) 2021/279
6. Commission Delegated Regulation (EU) 2021/771
7. Commission Delegated Regulation (EU) 2021/2304
8. Commission Implementing Regulation (EU) 2021/1378
9. Commission Implementing Regulation (EU) 2021/2119
10. Commission Implementing Regulation (EU) 2023/1195.

The draft of the Government Decision was approved on June 26th, 2024. This regulatory act approved 2 regulations, which establish:

- rules on the procedural requirements for the recognition of control bodies that are competent to carry out controls and certification of organic operators, groups of organic operators and organic products.
- rules on the supervision of the recognized control bodies and the measures to be taken in the supervision activity.
- rules on the measures applied by the competent authority or control authority within the supervision, including the suspension or withdrawal of the recognition for control bodies.
- rules on the control tasks and other actions to be carried out by those control bodies, including the information to be sent by control bodies for the purpose of their supervision.
- rules on the exchange of information and data relating to organic production and the labelling of organic products, as well as the details and format of information on the results of investigations in cases of contamination with products or substances not approved for use in organic production, which must be transmitted to the competent authority for the preparation of the general report.

The act also regulates special rules and conditions within the framework of controls on organic production and labelling of organic products, including controls to verify the establishment and functioning of the internal control system, as well as the measures to be taken in the event of the presence of unauthorized products or substances.

Government Decision No. 591/2024 *for approval of the Regulation on import and export of organic products*, transposed 4 EU acts:

1. Commission Delegated Regulation (EU) 2021/2305
2. Commission Delegated Regulation (EU) 2021/2306
3. Commission Implementing Regulation (EU) 2021/2307
4. Commission Implementing Regulation (EU) 2021/2325.

The draft of the Government Decision was approved on August 28th, 2024. The act establishes comprehensive rules for the verification of consignments intended for export as organic products or products in conversion. These include checks on the possession of certificates of inspection; official controls on products imported into the country and intended to be placed on the market as organic products or as products in conversion; actions to be taken by the competent authority, the control authority and the control bodies in cases of suspected or established non-compliance with the provisions of Law No. 237/2023, in imported and/or exported consignments of organic products; as well as declarations and communications by importers, transport operators, first consignees and consignees for the import of products intended to be placed on the market as organic products.

Government Decision No. 884/2014 *approving the Regulation on the use of the national trademark „Agricultura Ecologică – Republica Moldova"* establishes the procedures for granting the right to use the nominated national trademark and the modalities for labelling with it organic agri-food products produced in accordance with Law No.237/2023. The national trademark "Organic Agriculture - Republic of Moldova" for organic production may be used for labelling, presentation and advertising of products in accordance with the provisions of national legislation, as well as for information and educational purposes related to the existence and advertising of the logo.

Taking into consideration the above, in the field of organic farming, **all identified EU acts have been transposed into national legislation.** The remaining articles of the EU acts that have not been transposed pertain to EU norms that are not applicable at the national level, as their implementation will only become possible upon the country's accession to the European Union.

1.4. Institutional structure and administrative capacities

The development and promotion of policy in the field of organic agriculture is ensured by the Ministry of Agriculture and Food Industry of the Republic of Moldova, which is the central specialized body of public administration that ensures the implementation of government policy in the areas of activity entrusted to it, but also according to Law No.237/2023, is the competent authority responsible for the organic farming sector (figure 3), which operates based on the Regulation approved by Government Decision No. 695/2017. The Unit for Organic Production and Products with Designation of Origin is responsible for regulating state policy in the field of organic production, by developing and promoting the regulatory framework governing the organic sector. The role of Unit is to ensure a functional, efficient, and transparent legal framework in the field of organic farming and products with geographical indications, including by harmonizing it with European Union Regulations and international standards.

The National Food Safety Agency is the competent authority responsible for official controls in the agri-food sector and is designated as the control authority responsible for state controls in the field of organic production. The NFSA must carry out official controls on organic operators annually on at least 5% of the total number of operators who have concluded agreements on organic certification services with control bodies, accompanied by sampling.

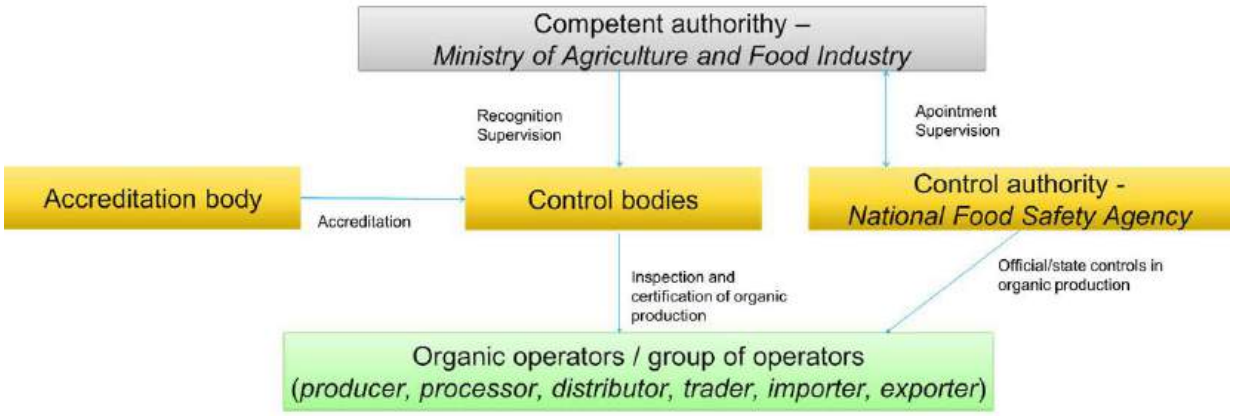


Fig. 4. System of control and administration in organic farming of the Republic of Moldova

1.5. Control and certification system

Inspection and certification of organic production are carried out only by private control bodies accredited and authorized in accordance with the requirements of the regulatory acts in force. As of 2024, there is one accredited and authorized control body operating within the country according to the national legislation, which is responsible for certifying organic production on the local market, as well as 12 control bodies recognized by the European Commission for the import of organic production from the Republic of Moldova into the EU. The National Accreditation Centre of the Republic of Moldova (MOLDAC) is responsible for the accreditation system.

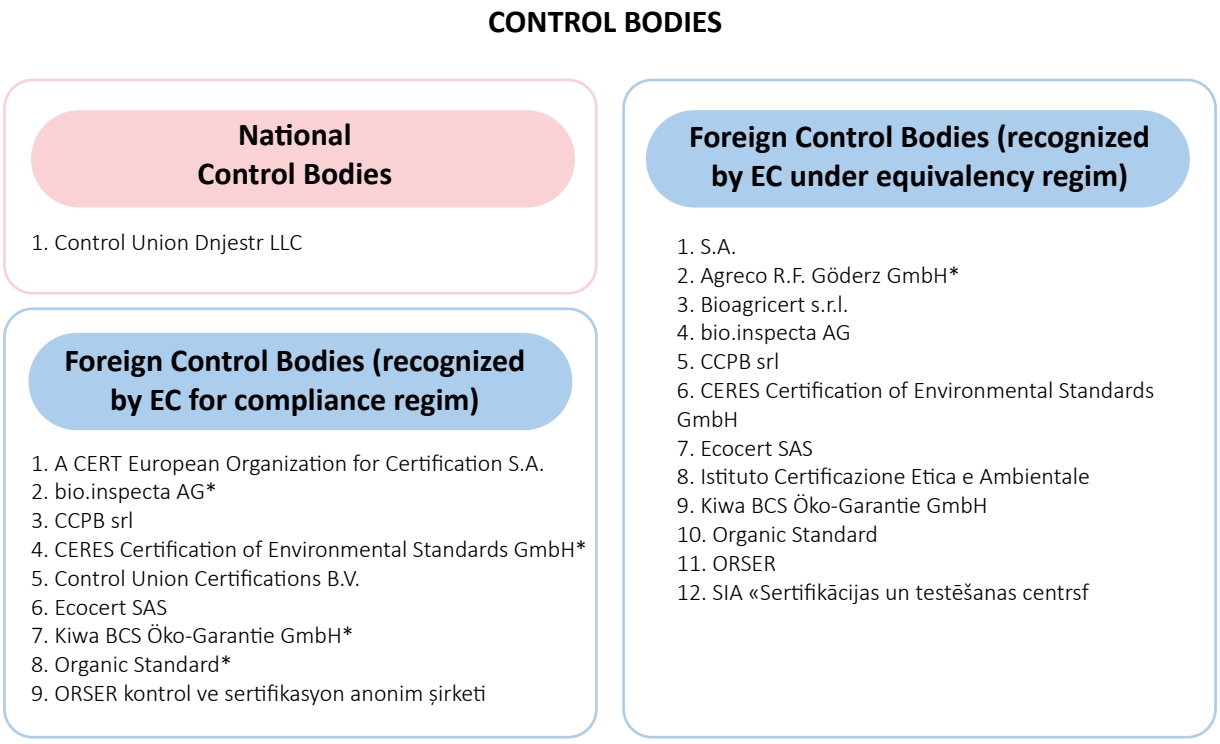


Fig. 5. Control bodies operating in the Republic of Moldova

1.6. Support schemes for organic farming

Financial support is granted for producers who are registered in the organic farming system as compensatory payment for income losses and the additional costs borne by the beneficiaries who enter voluntary commitments and undertake to remain in this organic farming system for a period of 5 years after the end of conversion period. At the same time, grant recipients are required to return the funds if they fail to maintain their participation in the organic farming system for the full five years. Farmers, who repeat the period of conversion for one and the same land area are not eligible to receive state aid again.

Support for organic farming is paid out according to land use, but with differences between payments for the conversion period and for fully organic production after conversion. The specific conditions for granting subsidies under the measure for the *Development of organic farming* are outlined in Government Decision (GD) No. 464/2023 on the approval of the Regulation on complementary subsidy measures and the specific eligibility conditions for complementary subsidies from the National Fund for the Development of Agriculture and Rural Environment and the repeal of Government Decision No. 455/2017 on the distribution of the means of the National Fund for the Development of Agriculture and Rural Environment.

Measure 5 Development of organic farming	**Sub-measure 5.1 Conversion**			**Sub-measure 5.2 Certification**	**Sub-measure 5.3 For maintaining and enhancing soil fertility**
	1st year	2nd year	3rd year	20% of the value of organic certified and marketed products	130 €/ha (for crops like: soybeans, peas, chickpeas, lentils, alfalfa, phacelia, vetch, sainfoin, clover, safflower, lupine, ryegrass, mustard, buckwheat, fodder radish)
Orchards, vineyards, fruits and strawberries	182 €/ha	208 €/ha	234 €/ha		
Medicinal and aromatic plants	104 €/ha	130 €/ha	156 €/ha		
Field crops, pastures and meadows	104 €/ha	130 €/ha	-		
Vegetables	625 €/ha	730 €/ha			
Beekeeping	42 € for a family of bees during the conversion period				

Table 1. Subsidies for the Development of organic farming sector from the National Fund for Agriculture and Rural Development

Source: Government Decision (GD) No. 464/2023 on the approval of the Regulation on complementary subsidy measures and the specific eligibility conditions for complementary subsidies from the National Fund for the Development of Agriculture and Rural Environment .

1.7. Data collection and Statistics

The data on organic production and farming statistics are collected by the Ministry of Agriculture and Food Industry (MAFI) through:

- Notifications made by organic operators upon registration at the competent authority (MAFI).
- Reports submitted by control bodies that perform inspection and certification in Moldova.

Reports received from the national and international control bodies operating in the Republic of Moldova are annually processed to collect data on the number of organic certified operators, the area certified organic or in conversion, as well the products which are certified. The information is made available on the official web page of the Ministry of Agriculture and Food Industry.

1.8. Research and Education

Taking in consideration the special requirements of organic agriculture to the varieties and hybrids of crops, a project coordinated and implemented in Moldova by Czech Agency for Development, the State Catalogue of Registered Varieties of Crops in Moldova, has included a list of varieties recommended for cultivation in ecological conditions. The list includes five varieties of winter wheat

and one variety of white mustard. At the same time the State Center for Testing and Registration of Phytosanitary Products and Fertilizers, with UKZUZ assistance has included the "List of Phytosanitary Products and Fertilizers allowed for using in organic (ecological) production".

Non-governmental organizations are very active in promoting ecological agriculture in Moldova. Notable organizations include: MOVCA (Moldova Value Chain Alliance); CNFA Moldova supported by USAID; AEDC Public Association for the Development; Donau Soja from Austria with representee in Moldova supported by Austrian Agency for Development (ADA); People in Need supported by Czech Republic; Ecovisio etc.

A separate program for organic agriculture research doesn't exist in the Republic of Moldova, although it is urgently needed.

Two research institutions in Moldova are conducting research related to organic agriculture: Selectia Research Institute of Field Crops in Balti and Research Institute of Genetics, Crop Physiology and Crop Protection in Chișinău. The first research institution conducts research in long-term field experiments on: crop rotations, different systems of soil fertilization, soil tillage and irrigation, polyfactorial experiment on action and interaction between crop rotations, soil tillage and fertilization in the crop rotation without using chemicals for weed, pest and disease control; separate long-term experiment on ecological agriculture. The second research institute specializes in working out the biological measures for pest and disease control in organic agriculture.

Nevertheless, there are many issues in organic agriculture which require investigations, like:

- comparative studies of the influence of different crop rotations (with and without perennial herbaceous crops) on soil fertility
- the influence of cover crops on yields of different crops and soil fertility in the crop rotation
- studying the compatibility of cover crops and the main crops in the crop rotation
- investigating the possibility of avoiding (excluding) mouldboard ploughing in crop rotations by implementing a comprehensive set of measures to improve soil health
- studying the impact of flowers strips on the infestation of crops with pest
- studying the influence of the allelopathic effect on weed infestation for different crops
- integrating principles of conservation agricultural system into organic agriculture
- integrated management of weeds
- benefits of integration animals in crop rotations etc.

Taking in consideration the challenges faced by modern conventional agriculture and the necessity of transition to a more sustainable, including organic agriculture, Republic of Moldova needs to:

- change the research and innovation budget by allocating at least 30% for the development of organic sector in 2025-2030
- establishing a National Program of Research for Organic Agriculture by specializing one of the research institutions in the Organic Agriculture, where research should be interdisciplinary.

Educational work in Moldova on organic agriculture should be based on the results obtained by the research institutions, universities and the experience of progressive farmers in these directions.

At the university level in Moldova, there are no dedicated chairs on Organic Agriculture. However, there are Chairs of Agroecology at the State University of Alecu Russo in Bălți and the Technical University of Moldova in Chișinău. Additionally, the curriculum for teaching agroecology has also been developed for technical schools in the cities of Ungheni and Țaul.

Training programs for farmers are organized regularly by different research institutions and NGO, which are working closely with research institutions.

All the above-mentioned practices can be achieved through a good system of research and education at the different levels.

1.9. Challenges and gaps

The sectors development faces some challenges and gaps, mainly ones being small share of area under organic farming practices, low local consumption of organic products, insufficient development of processing units in the value chain (the organic goods produced in Moldova are mostly processed outside the country, respectively added value on the production chain is outside), and lack of organic inputs, including organic certified seeds, animals, aquaculture species.

Farmers in the Republic of Moldova procure inputs from input supply companies or organic farmers in the country. Companies that provide inputs usually sell both conventional and organic inputs. Although some products are available on the market in the Republic of Moldova, limited supply and expensive inputs have affected the growth of the organic sector and are key constraints to achieving scale.

Importing certified green pest control technologies is expensive, both due to product and transportation costs. Those imports to Moldova come mainly from Germany and EU countries. If active microorganisms are present, they must be transported and stored in cold storage, significantly increasing the final retail price. Inputs for organic farming can have a short shelf life, requiring careful management planning by suppliers and application by producers.

Imported and approved organic fertilizers are not consistently available and are considered expensive. Key inputs such as rock phosphate and potassium are often not available. A partial alternative, increasing the use of cover crops, is being experimented with by some producers. In general, input prices are high because market demand is low, and regulation is complex.

The common problem in both organic and conventional agriculture is the lack of qualified personnel. The interest of the younger generations towards agriculture is constantly decreasing, young people prefer to leave or choose other fields of activity, which generates a pressing problem for farmers.

In the Republic of Moldova, there is an increasing demand and consumption of organic products, likely driven by growing awareness of their health and environmental benefits. When analyzing consumer categories, the most significant group for organic products is young mothers, followed by individuals who embrace a healthy lifestyle and those with dietary restrictions that require them to eat healthily. These groups are crucial in promoting the consumption of organic products within the country.

However, the low level of awareness and insufficient promotion makes the organic products market in the Republic of Moldova still modest, and one of the reasons is that the population does not know the health and environmental advantages of these products, but also because they consider them expensive. The standard of living also plays an important role, thus, we observe that in developed countries, with a high standard of living, the consumption of organic products is higher and wider.

2. STRATEGIC GOAL AND OBJECTIVES

The strategic vision of the National Organic Action Plan for 2025-2030 is the development of a competitive organic agri-food sector, centred on integrated value chains with enhanced potential, resilient to climate change, which strengthens food safety and ensures well-being and better living conditions in rural areas.

The action plan is developed taking in consideration three interlinked strategic goals (Figure 5) that reflect the structure of the food supply chain and the Green Deal's sustainability objectives.

Strategic Goals		
1. Stimulating demand for organic products and increasing consumer confidence: **2.** ➢ Integration of organic products into public food system (schools, kindergartens); ➢ Organizing different events regarding organic production and organic products; ➢ Organizing campaigns to promote the benefits of organic farming, the national logo for organic products; awareness campaign regarding local organic producers; ➢ Use of media and social media to inform and raise awareness among local public/consumers about what organic produce is? Why is it better than the conventional one?... through active participation in TV shows, radio, advertising on billboards, in supermarkets, various video spots.	**2) Stimulating conversion and strengthening the entire organic value chain:** ➢ Increase of certified areas in organic system; ➢ Programs for landscapes diversification and improvement of degraded lands; ➢ Strengthening the organic value chain by integrating local production with processing and marketing units, which will ensure short supply chains, and increase the consumption of organic products in our society; ➢ Diversification of the product spectrum, including niche products and diversification of the type of product delivered; ➢ Livestock sector development, for a closed integrated cycle of plant and animal production; ➢ Development of the organic seed production sector.	**3) Establishing a complex and comprehensive system of administration and control in the organic sector:** ➢ Strengthening the staff and capacity of the Department within the Ministry; ➢ Strengthening the capacity of the National Food Safety Agency to supervise the local markets and combat the placement of fake organic products; ➢ Establishing a complex data collection system on the state of organic sector: exchange of information between the institutional structures involved.

Fig. 6. Strategic goals of the National Organic Action Plan

To achieve the goals, the main objectives have been outlined:

Objective 1: to increase Organic Production and Processing by enhancing organic and processing farming practices and expand organic agricultural land and processing capacities to meet growing consumer demand for organic products.

Objective 2: to develop domestic organic markets and access potential international markets by public relations, advertising and sales promotion, for export economy strengthening distribution i.e. logistic infrastructure and improve access to markets.

Objective 3: to enhance Policy and Regulatory Frameworks by developing and implement supportive policies and regulations that encourage the growth of the organic sector while ensuring consumer confidence and environmental sustainability.

Objective 4: to support Innovation and Research by investing in research and innovation to advance organic farming techniques, increase productivity, and address challenges specific to the country.

3. ACTION PLAN FRAMEWORK

The NOAP aims to create a holistic approach to develop and promote the organic sector in the Republic of Moldova by 2030. Based on the Market System Development (MSD) approach, which considers all aspects and target groups of the organic sector development, NOAP addresses 4 action areas as main pillars to achieve the outlined/defined strategic objectives (Annex 1), namely:

- Action Area 1: Production and Processing,
- Action Area 2: Market Development and Promotion,
- Action Area 3: Regulations, Certification and Control, Policies,
- Action Area 4: Research, Education, Training, Extension Services, and

Consumer awareness, continuous information sharing and market trends have made organic farming a hot topic of discussion. While the challenges are significant, the goals are promising, and through joint efforts we aim to develop this production system, which is not only environmentally friendly but also positively impacts the health of society.

Annex 1

Framework of actions for organic growth

Needs	Actions	Monitoring indicators	Budget	Responsible	Support/ participation	Timeframe
Area 1: **Production and Processing (*Capacity Building and Training Programs)***						
Developing organic value chains and their upgrading	1. Ensuring technical/informational support in transition from conventional to organic production.	№ of consulted farmers, learning materials/ guidelines	Public, external sources	MAFI	ARAC, MOVCA	Ongoing
	2. Launching and supporting regional/ local integrated production with processing and marketing units	Created regional/ local HUBs in organic sector	Public, external sources	MAFI	NGOs, GIZ, ODA, USAID	2026-2027
	3. Fostering cooperation among the organic operators, as well as strong collaboration with conventional farm organizations on growing organic sector	№ of created groups of operators, cooperatives, associations, clusters	Public, external sources	MAFI	NGOs	Ongoing
	4. Integration of organic products into the public food system (schools, kindergartens)	Share of organic products in public food system	Public, external sources	MAFI	MF, MER, NGOs	Since 2025
	5. Developing organic livestock and feed production, for the integration of a closed cycle of plant and animal production.	№ of organic livestock farms registered, amount of farmyard manure used	Public, external sources	MAFI	AIPA, ODA, NGOs	Since 2025
	6. Government support/ subsidies for conversion and maintaining organic farming practices	№ of subsidized operators, area and products.	Public	MAFI	AIPA	Ongoing
Developing and improving technology and infrastructure	1. Supporting investments in adapting new technologies and practices, including processing facilities for added value products	№ of subsidized operators, offered grants	Public, external sources	MAFI	AIPA, ODA	Ongoing
	2. Supporting digitalization of farms operations and incentivize farmers to adopt modern tools like precision agriculture to save resources and boost productivity in organic farming	№ of digital service provided, apps, equipment/tools for precision farming	Public, external sources	MAFI	NGOs, GIZ, ODA, USAID	Since 2025
Developing programs for landscape diversification and improvement of degraded lands	1. Fostering implementation of agroforestry practices	Created forest belts as buffer zones	Public, external sources	MAFI	NGOs, GIZ, ODA, USAID, AIPA	Since 2025
	2. Promoting biological and genetic diversity in agricultural landscapes, crops and livestock	Spectrum of certified products	Public, external sources	MAFI	NGOs, GIZ, ODA, USAID, AIPA	Since 2025
	3. Government support/ subsidies for soil fertility maintenance and improvement	№ of subsidized operators and area.	Public	MAFI	AIPA	Ongoing

Needs	Actions	Monitoring indicators	Budget	Responsible	Support/ participation	Timeframe
Area 2: **Market Development and Promotion**						
Promoting organic farming and national logo	1. Building and strengthening the organic NGOs capacities as catalysts for organic growth	№ of pro-active NGOs, associations	External sources	MAFI	NGOs, Associations	Since 2025
	2. Organizing and supporting product promotion campaigns though events (exhibitions, fairs, conferences, markets), media (TV, radio, social media)	№ of organized events	External sources, donors support	MAFI	NGOs, Associations	Since 2025
	3. Creating a sustainable and educational agro-tourism model that showcases organic farming while providing economic benefits to farmers and raising consumer awareness about the importance of organic practices	№ of agro-touristical sites	External sources, Donor	MAFI	SMEs, NGOs, GIZ ,We effect, Helvetas	2025 – Identify supportive measurements to develop agro-tourism initiatives. 2026-2027 – setup of agro-touristical businesses
Local market development	1. financial and technical support of marketing initiatives of organic producers	№ of food chains	Public, external sources			
	2. Fostering financial and technical support for setting up new sales points for organic products	№ of sale points and range of local certified organic products available on the market	Public, Donors	MAFI	NGOs, AIPA, NFSA	Ongoing
	3.Supporting direct sales channels for organic products, by integrating organic food into the procurement of canteens in schools/kindergartens and hospitals	№ of canteens purchasing organic goods, share of organic products in public food system	Public, external sources	MAFI	MER, MF, local authorities, AIPA, NFSA	Since 2025

Needs	Actions	Monitoring indicators	Budget	Responsible	Support/ participation	Timeframe
Consumer education and information	1. Analysis of consumer behaviour, consumer trust and market penetration	№ of interviewers, developed questionnaires	Public, external sources	MAFI	NGOs, ANSA, EBA	Annually
	2. Organizing information campaigns to improve awareness and promote healthier eating habits among individuals and communities	№ of organize campaigns, № of attendees	Donors, private companies	MAFI	NGOs, Associations, Ministry of Education and Research	Ongoing
	Launching education campaigns for consumers, retailers and foodservice providers to raise awareness about the benefits of organic products for health, environment, and rural development	№ of organize campaigns, № of attendees	Donors, private companies	MAFI	NGOs, Associations, MER	Ongoing
Area 3: **Policy framework, Regulations, Control and Certification** ***(through)***						
Building a strong and coherent national regulatory framework for boosting the organic food and agricultural sector	1. Drafting and adopting national legislation fully aligned with the EU Organic Regulation 2018/848	№ of adopted legal acts	Public	MAFI	NFSA	Ongoing
	2. Setting national organic labelling requirements, use of national trademark, label for organic cuisine	№ of issues authorization for national logo use	Public, External sources	MAFI	NGOs, NAIP	Ongoing
	3. Mobilize local policy: organic food and farming as a tool for local sustainability goals	№ of local initiatives	Public, External sources	MAFI	Local authorities, NGOs	Since 2026
Policy Advocacy and Regulatory Support	1. Strengthen cooperation among policymakers and cross-ministry collaboration to develop and implement supportive policies for the organic sector	№ of legal acts with reference to organic policy linkages.	Public, External sources	MAFI	Central and local authorities	Ongoing
	2. Promote green public procurement as a driver for organic growth, through amendments to relevant national legal acts	№ of approved proposals	Public, External sources	MAFI	MF, MED, central and local authorities	Since 2025
	3. Reinforce organic school schemes	№ of approved schemes	Public, External sources	MAFI	MF, MED, central and local authorities	Since 2025

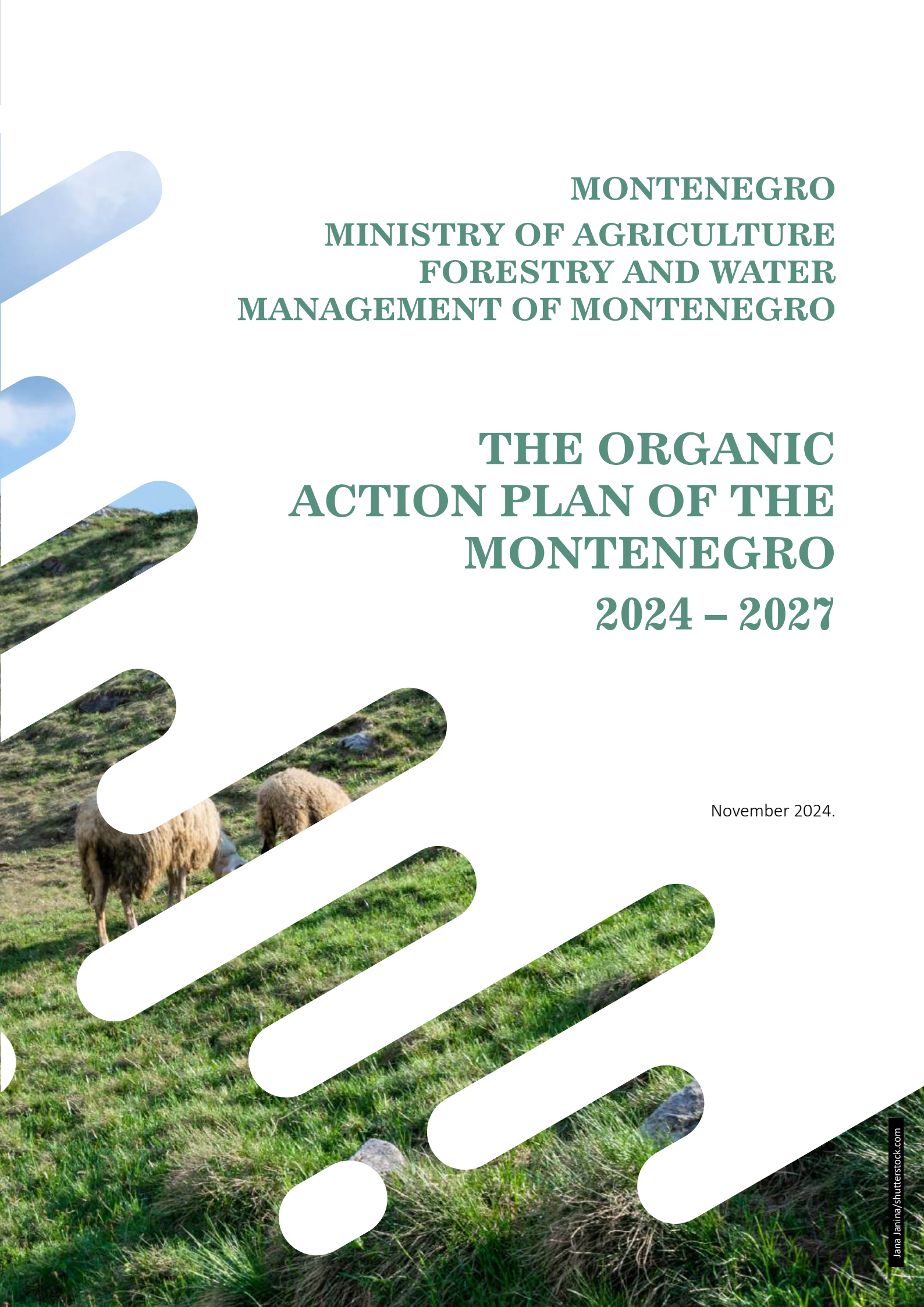
Needs	Actions	Monitoring indicators	Budget	Responsible	Support/ participation	Timeframe
Strengthening administrative capacities	1. Developing a national electronic information system *Register of organic farming*, for data collection, exchange of information between the institutional structures involved	Implemented IT system	Public, External sources	MAFI	MF, central and local authorities, NGOs, NFSA	2025-2027
	Establishing a complex and comprehensive system of administration and control in the organic sector for local market supervision and preventing/ combating fraud in organic sector	№ of trainings, workshops, № of attendees	Public, External sources	MAFI	NFSA,	Ongoing
Area 4: **Research, Education, Training, Extension Services (Research and Innovation Grants)**						
Farmer training programs	1. Organize workshops and seminars in various regions, focusing on practical skills and the latest trends in organic farming	№ of trainings, workshops, № of attendees	Public, External sources	MAFI	ARAC, NGOs, Associations, USAID, GIZ, ODA	Annually
	2. Organizing free *conversion checks*, as advice services to motivate farmers, debunk myths	№ of free checks performed	Public, External sources	MAFI	NFSA, CBs, USAID	Since 2025
Extension service: e-learning platform	1. Strengthen farm advisory services on specific topics, notably as part of the Agricultural Knowledge and Innovation System (AKIS), to promote relevant knowledge exchange	Implemented AKIS, № of beneficiaries	Public, External sources	MAFI	ARAC, NGOs, research institutions	Since 2027
	2. Development of training courses on organic farming	№ of courses, format, № of attendees	Public, External sources	MAFI	ARAC, NGOs, NFSA, research institutions	Since 2025
	3. Training agricultural consultants	№ of trainings, № of attendees	Public	MAFI	ARAC	Annually
Exchange of best practices and innovations in organics	Organizing barn and field schools for farmers to address issues in organic farming (e.g. on animal health, soil fertility)	№ of events organize, № of attendees	Public, External sources	MAFI	ARAC, NGOs, Associations, USAID	Annually
	Collaborations with Research Institutions to conduct research on organic farming techniques, soil health, pest management, and value-added product development	№ of research conducted projects, № of involved scientific researchers	Public, External sources	MAFI	MER, NGOs, Association	Since 2025

MONTENEGRO

MINISTRY OF AGRICULTURE FORESTRY AND WATER MANAGEMENT OF MONTENEGRO

THE ORGANIC ACTION PLAN OF THE MONTENEGRO 2024 – 2027

November 2024.



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1. Introduction

The impact of global climate change is being felt in almost all spheres of human life, and due to its direct dependence on climatic factors, the agricultural sector is one of the most vulnerable. According to relevant climate projections, the impact of climate change is expected to increase in the future, with increasingly negative consequences for agriculture, threatening global food security and the lives of millions of people. Therefore, humanity needs new agricultural and food systems that are able to adapt more dynamically, be environmentally compatible, resilient, and economically efficient in the use of limited natural resources. For these reasons, the need to increase the area under organic production is becoming increasingly evident. Although organic production cannot solve the problem of climate change alone, it plays a significant role in mitigating its consequences and contributes to the sustainability of agriculture. To ensure that the supply and demand for organic products are balanced, it is necessary, in addition to increasing the area under organic production, to simultaneously develop the organic food processing industry and increase consumption of organic products.

The European Green Deal's Farm to Fork Strategy and the EU Biodiversity Strategy set a very ambitious target for at least 25% of the EU's agricultural land (around 40 million hectares) to be under organic farming by 2030. The share of land under organic production in the EU-27 in 2022 was 10.5% of the total utilised agricultural land (from 0.6% in Malta to 25.7% in Austria). The increase in the share of land under organic farming in the EU (the share of land under organic farming in 2012 was 5.9%) is the result of increasing demand for organic products and strong political support. Although the current European policy is expected to lead to an increase in the share of organic agriculture in the coming years, the question is whether this growth rate will be sufficient to achieve this goal, taking into account that the four member states account for almost 60% of the EU's organic agricultural area.

Organic farming represents one of the strategic priorities for the development of Montenegrin agriculture. Although it is essentially a relatively new form of agriculture, the tradition of producing in harmony with nature has deep roots in Montenegro. For generations, the population in rural areas has practiced agricultural methods based on the use of organic fertilizers, crop rotation, and biodiversity conservation. With the development of modern agriculture, based on chemicalization and high-yielding genotypes, these traditional methods have begun to rapidly disappear from farm fields. The share of land under organic production in the total utilized agricultural area in Montenegro is only 1.6%, similar to other Balkan countries. To ensure the continued growth of organic production, in the coming period it will be necessary to pay greater attention to the marketing of organic products, in order to increase their demand through greater market recognition.

The first significant step in developing the organic production sector in Montenegro was made in 2004 with the adoption of the Law on Organic Production. This law laid the legal basis for the development of this sector and established production standards and a control system. Favourable agro-ecological conditions, preserved natural resources, unpolluted land, and tradition in the sustainable production of agricultural products represent significant potential for the growth and development of the organic sector. Although organic production in Montenegro is recording continuous growth, it is still underdeveloped. This sector faces numerous challenges, the most important of which are small production volume, insufficient knowledge of producers about the principles of organic production and certification procedures, an underdeveloped market, and insufficient promotion of organic products. Over the past 10 years, significant results have been achieved. Recognising the advantages of organic production and its potential on the market, but also due to generous state support, many farmers opt for this type of production. As a result of the continuous efforts of all relevant actors, the

areas under organic production have expanded, and the number of organic producers and the range of organic products has increased.

Montenegro has excellent conditions for producing high-quality organic food, so through continuous support from the state and the association of producers, it could become a recognizable producer of organic products in the region. This imposes the need to adopt *a Strategic Plan for the development of organic production in Montenegro from 2025 to 2028,* which will comprehensively define the goals and activities necessary to strengthen agriculture based on the practices and values of organic agriculture. The Strategic Plan for the Development of Organic Production should be a key instrument that will enable organic production to develop in a planned and sustainable manner, contributing to the protection of the environment, the improvement of consumer health and the development of rural areas.

The Strategic Plan for the Development of Organic Production in Montenegro is a document of the Ministry of Agriculture, Forestry and Water Management of Montenegro and was created as a result of the activities of the Regional Expert Advisory Working Group (REAWG) for organic agriculture, within the project "Agricultural Policy Dialogue Germany – Western Balkans". It is an indispensable tool that defines a clear vision of the future of organic production, sets concrete goals and determines the steps needed to achieve them. This document aims to establish effective coordination of all relevant stakeholders involved in organic production (producers, institutions and consumers), to enable optimal use of available resources and regular monitoring of the implementation of the set goals. In addition, it contributes to increasing the competitiveness of organic products on the market, encourages the sustainable development of organic production, and serves as a basis for making important decisions on future investments and policies.

The Strategic plan for the development of organic production is a set of concrete measures whose implementation will lead to an increase in the area under organic production, improvement of the quality of organic products, more intensive development of organic products processing, strengthening of the organic products market, increased awareness of organic production, strengthening of the institutional framework and system of support for organic production.

2. Analysis of the state of organic production in Montenegro

2.1. Production and processing

Organic agriculture as a sustainable production system is one of the priorities for developing Montenegrin agriculture. In the last ten years, interest in organic production has been constantly growing in terms of total areas and the number of organic producers. Table 1 shows that in 2016-2023, the agricultural area used without gardens increased by 39%, and the number of registered organic producers increased by 84%.

According to the data of the certification body "Monteorganica" d.o.o. from 2023 (Report on the work of the certification body "Monteorganica" d.o.o. for 2023), the structure of organic production is dominated by meadows and pastures with 3952 ha, which are mainly used for mowing and grazing livestock. They are followed by perennial crops (564 ha) and arable crops (307 ha). The largest share in the area under perennial plantings in 2023 has mixed fruit plantations – 456.36 ha, of which 316.97 ha is organic and 139.92 in the transitional period. The most cultivated fruit species is plum

with 83.13 ha (67.33 ha in organic status and 15.08 ha in the conversion period), followed by apple – 29.57 ha (23.59 ha and 5.98 ha), chokeberry – 23.43 ha (15.40 ha and 8.03 ha) and walnut – 22.02 ha (15.77 ha, or 6.25 ha). The most cultivated crops are barley – 43.11 ha (32.91 ha in organic status and 10.20 ha in the transitional period) and buckwheat – 39.17 ha (29.34 ha, or 9.83 ha). In recent years, there has been a noticeable tendency to increase the area under cereals. Organic grain production in Montenegro is predominantly based on genetic resources. Grass clover mixtures, with an area of 161.98 ha (140.63 ha in organic status, or 22.35 ha in the transitional period) and alfalfa – 14.83 ha (14.47 ha, or 0.36 ha) are the most common fodder crops on arable land. The production of vegetables according to the principles of organic production is represented by only 3.36 ha. In slightly larger areas, only potatoes, beans, zucchini and garlic are grown. Although Montenegro has very favourable conditions for collecting and growing many medicinal plant species, the market of medicinal plants in Montenegro is underdeveloped and significantly less developed than the market in the immediate environment. On the international market, Montenegro is mostly an exporter of unprocessed plant material. According to data for 2023, wild medicinal herbs and forest fruits are collected on an area of 139832.5 ha.

Table 1: Area of certified organic crops, including areas in the process of conversion (ha) and number of registered producers

Indicator	2016.	2017.	2018.	2019.	2020.	2021.	2022.	2023.	Index 2016-2023
Number of registered producers	280	308	328	393	423	446	456	514	**184**
Used agricultural land without gardens	3.470	2.718	4.455	4.751	4.823	4.404	3.966	4.823	**139**
Meadows and pastures	2.798	1.992	3.696	3.925	3.952	3.564	3.134	3.952	**141**
Arable land	263	300	302	319	307	298	286	307	**117**
Perennial plantings	408	426	456	508	564	542	546	564	**138**
Share of organic production in total utilised agricultural land (%)	1.2	1.1	1.7	1.8	1.9	1.7	1.6	1.6	**142**

Source: https://ec.europa.eu/eurostat/data/database, https://monstat.org/cg/ and MAFWM, 2023

The total arable area in the certification process in 2023 was 960.56 ha. Of this, 717.08 ha (75%) were in the status of organic production, and 243.48 ha (25%) in the transitional period.

Although the area under organic agriculture is slowly growing from year to year, their share in the total utilised agricultural land is still very low (1.6% in 2023) and significantly lags behind the EU average (10.5%, *https://ec.europa.eu/eurostat/*).

The data on certified organic livestock, poultry and bees (Table 2) show that organic livestock production in Montenegro is underdeveloped. In 2016-2023, the growth index was recorded in the number of cattle, beehives and laying hens, while a constant decline was recorded in other categories. In the same period, the cultivation of goats, according to the principles of organic production, completely stopped. The decline in organic production in livestock farming, registered in 2020, is a consequence of measures against the spread of the COVID-19 virus (restriction of movement and shortage of labour).

Organic aquaculture production in Montenegro is not represented, although there are very favourable natural conditions for it. If we analyse the method of shellfish farming, the achieved cultivation

standards, and their placement on the market, then it can be concluded that shellfish have the potential to be the first organically certified aquaculture product in Montenegro.

Table 2: Certified organic livestock, poultry and bees

Indicator	2016.	2017.	2018.	2019.	2020.	2021.	2022.	2023.	Index 2016-2021
Cattle (number of heads)	200	398	420	578	393	445	**431**	**429**	**214**
Sheep (number of heads)	1643	1426	1545	1787	1369	987	**779**	**693**	**0,42**
Goats (number of heads)	300	256	5	-	-	-	**-**	**-**	**-**
Laying hens (number of beaks)		390	170	160	300	200	**300**	**550**	**141**
Bees (hives)	1851	2375	2788	1964	3381	4862	**2926**	**6583**	**355**

Source: https://ec.europa.eu/eurostat/data/database , https://monstat.org/cg/ and MAFWM, 2023

The number of organic producers engaged in processing organic products in crop and livestock production in 2023 was 25. The main products of processing in crop production are flour (common wheat, spelt, barley, oats, buckwheat and rye) and fruit juices (apple, pear, chokeberry, etc.), while cheese, shell and meat are the most common products of animal origin. The processing of organic products is carried out following the applicable legislation and good manufacturing practices. The establishment of documented identification systems is something that needs to be given more attention in the coming period.

As the demand for organic food products is constantly growing, it is necessary to work on establishing a diverse, health-safe, certified range of organic products. For processing in organic production to preserve the integrity, i.e. the organic status of the foods it uses as raw material, in the future, special attention should be focused on building capacities for adequate storage of organic products.

The MAFWM keeps the Register of Entities in Organic Production as the competent state administration body for creating and implementing policy in the field of organic production. In 2023, the number of registered producers was 514; compared to 2016, it was 84% higher. Organic production is present in each of the 25 Montenegrin municipalities, but most organic producers are registered in the northern part of Montenegro (Bijelo Polje, Berane, Pljevlja, Andrijevica and Plužine). Of the total number, 91.63% of registered producers are located in the northern, and the remaining 8.37% are in Montenegro's central and southern parts.

Based on the above data, it can be seen that organic production in Montenegro is still quite underdeveloped. It is quite extensive and based on the production of small quantities, primarily for the local market. With high input prices and traditional technology, organic production in Montenegro is uncompetitive, both in the domestic and foreign markets. The most important problems in this branch of crop production are disorder and low soil fertility, inadequate basic tillage and pre-sowing preparation of the soil, insufficient use of certified seed material, diseases and pests, the increasing pressure of climate change, unorganised product placement, as well as the lack of financial resources for technological equipment and expansion of production. In addition, poor infrastructure, especially in rural areas, lack of quality forms of association and insufficient level of expertise have also been identified as significant weaknesses in the sector.

2.2. Market of organic products

The market of organic products in Montenegro is still quite underdeveloped. However, the demand for organic products is growing every year, as more and more consumers realize the benefits of organic food. Organic products are generally more expensive than conventional ones, which limits their availability to a wider range of consumers. The availability of organic products in Montenegro is mostly limited to specialty stores and certain shopping malls. Lack of education and public awareness of the benefits of organic production and consumption and a poorly developed sector of the processing industry are the main barriers to faster development of the organic products market in Montenegro.

In Montenegro, there are no records of imports and exports of organic products because the Customs administration does not separate organic from conventional products. The Montenegrin control body "Monteorganica" is not recognized by the EU for the export of organic products to the EU, and for these reasons does not have data on the export of organic products. Data obtained from the Customs administration of Montenegro show that the export of organic products from Montenegro takes place through 8 control bodies from abroad: Agreco R.F. Goderz GmbH (Germany), Bio.inspecta AG (Switzerland), CERES Certification of Environmental Standards GmbH (Germany), Ecocert SA (France), Ecogrupo (Italy) Kiva BCS Oko-Garantie GmbH (Germany), Organic Control System (Serbia) and Organic Control (Bosnia and Herzegovina). From the data given in Table 3, it can be seen that the quantities of organic products exported from Montenegro are very small. There are a large number of factors that affect this situation, but the most important ones are: relatively small total production of organic products in Montenegro, lack of standardization, complex and expensive organization of logistics and distribution of organic products to distant markets, lack of marketing knowledge, etc. Export of organic products from Montenegro has great potential, but significant efforts need to be made in order to overcome the existing challenges.

Table 3: Exports of organic products (kg)

Product	2018.	2019.	2020.	2021.	2022.	2023.	2024.
Dried mushrooms	20.432	17.745	28.825	16.533	30.378	25.027	12.405
Wild berries, frozen	304.469,5	452.611	241.922,8	421.413	450.506,7	48.750	118.042
Dried wild berries							148,40
Herbal teas							176,40

Source: Certification Body "Organic Control" from Sarajevo (https://www.organskakontrola.ba/)

Significant steps can be made in this sector through greater support from the state, association of producers, greater investments in processing capacities, marketing and promotion, and brand creation. Such measures would contribute to the recognition of the added value of domestic organic products on the market and thus lead to a further increase in the number of organic producers and areas under organic production.

2.3. SWOT analysis of the organic sector in Montenegro

Although the organic farming sector in Montenegro has been constantly growing and developing in recent years, many challenges need to be addressed in the coming period. The SWOT analysis of Montenegrin organic production in this plan provides a clear insight into the strengths, weaknesses, opportunities and threats that this very important agricultural branch faces on its progress. The overview of the organic production sector in Montenegro identifies numerous advantages and observed positive trends, but also points to certain problems that need to be urgently addressed (Annex 1).

3. NATIONAL POLICY IN THE ORGANIC PRODUCTION SECTOR

For the definition of the Strategic plan for the development of organic production in Montenegro from 2025 to 2028, the existing strategic framework of Montenegro, i.e. its horizontal and vertical interconnection, is of particular importance. This strategic plan incorporates the strategic objectives of interrelated sectoral policies. Below are the key strategic documents with which this plan is aligned:

The Strategy for the Development of Agriculture and Rural Areas 2023-2028 offers a whole set of activities to reduce overconsumption and unsustainable use of natural resources and their use in a sustainable way, such as: the promotion of organic agriculture, reduction of the negative impact of agriculture on the environment, preservation of biodiversity, increasing the quality of agricultural products and contributing to the affirmation of Montenegro as an ecological state. One of the strategic goals is to increase the resilience and competitiveness of food production and processing, which refers to improving the conditions for producing high-quality food of organic origin with a sustainable income for farmers.

The Regional Development Strategy of Montenegro for the period 2023–2027 allocates significant funds for projects committed to developing agricultural production with organic and protected geographical origin, improving road infrastructure, investing in physical capital on agricultural holdings, developing communal infrastructure and solid waste and wastewater management, and developing tourism, among other things.

The National Strategy for Sustainable Development until 2030 is a long-term development strategy of Montenegro that defines solutions for sustainable management with four groups of national resources: human, social, natural and economic. This strategy offers a complete set of measures that contribute to the realisation of the global Sustainable Development Goals. The main opportunities for increasing resource efficiency in agriculture are technological improvements, dissemination of knowledge and information on preserving soil fertility, expansion of organic agriculture, diversification of income sources in rural areas and development of an efficient food industry sector. Given the importance of agriculture for the Montenegrin economy, this sector, including organic farming, should be one of the priorities regarding resource efficiency.

The Smart Specialization Strategy of Montenegro 2019-2024 represents a strategic framework for developing and implementing innovations and creates preconditions for a stronger connection between science and economy. The main objective of S3 is to modernise and increase the competitiveness of the Montenegrin economy through the concentration of available research and natural and economic resources in a limited number of priority areas. Strengthening the organic production value chain and developing new agricultural products (products with a designation of origin) are recognised as key sectoral objectives in the “Sustainable agriculture and food value chain” area.

The Tourism Development Strategy of Montenegro 2022-2025 with the Action Plan, as part of one of the strategic goals, envisages encouraging employment, creating new and preserving existing jobs through the development of business activities and the valorisation of natural and agricultural goods, the promotion of healthy and organic food, the stimulation of economic activity, and mitigating the trend of migration from rural areas.

The Rural Tourism Development Program 2023-2025 aims to improve rural tourism development in all areas of Montenegro where this activity occurs. This program recognises the potential for the development of rural tourism through the development of eco-tourism, connecting villages and ka-

tuns with the production of organic, traditional food, as well as with the production of folk handicrafts into a unique catering offer. The public calls cover mostly all areas, starting from rural tourism, beekeeping, olive growing, vegetable growing, fruit growing, livestock breeding, waste management in agriculture, organic fields, fisheries and mariculture.

The Health Tourism Development Program of Montenegro 2021-2023, with the Action Plan until 2023, envisages the incorporation of health tourism into the marketing strategy of the National Tourism Organization of Montenegro- strengthening the communication system, precise targeting of market segments, grouping attractions, creating portals for the promotion of health tourism and promoting Montenegrin national cuisine with an emphasis on organic food. This approach, through new technologies, the production of medicines, herbs and organic food, and the provision of specialised health services, will enable a higher quality of life and, thus, prosperity for the nation. Homemade organic food in the offer of health tourism can be of particular importance, as health tourists prefer destinations that offer organic food and clean spring water

4. LEGISLATIVE AND INSTITUTIONAL FRAMEWORK FOR ORGANIC PRODUCTION

4.1. Regulations in organic production

The legal framework for organic production in Montenegro is the Law on Organic Agriculture, adopted in 2004 ("Official Gazette of the Republic of Montenegro", No. 49/04). With the establishment of the body for control and issuance of certificates in organic agriculture at the end of 2005, all the conditions for developing organic agriculture in Montenegro were met. To harmonise the national legislation in the field of organic production with the new EU regulations (32007R0834, 32008R0889, and 32008R1235), the drafting of the new Law on organic production has begun in accordance with the EU Council Regulation (EC) No. Regulation (EC) No 834/2007 and Commission Regulation (EC) No 834/2007 889/2008 and adopted in 2013 ("Official Gazette of Montenegro", No. 56/2013).

Based on this law, the following bylaws were adopted, which regulate in more detail the goals and principles of organic production:

- Regulation on detailed rules and conditions for crop and livestock production ("Official Gazette of Montenegro", No 56/13);
- Rulebook on Detailed content, manner of registration and keeping of the register of entities in organic production ("Official Gazette of Montenegro ", No. 26/2015);
- Rulebook on the Manner and methodology of professional control in organic production ("Official Gazette of Montenegro ", No. 78/2015);
- Rulebook on the Content and size of the organic production sign ("Official Gazette of Montenegro", No. 60/2016);
- Regulation on detailed conditions and rules for processing, packaging, transport and storage of organic products ("Official Gazette of Montenegro", no. 83/2016); And
- Regulation on detailed rules and conditions of organic production for aquaculture animals and seaweed ("Official Gazette of Montenegro", No. 84/2017).

4.2. Institutional framework

The Ministry of Agriculture, Forestry and Water Management (MAFWM) is the competent state administration body in charge of creating and implementing policies in the field of organic production, enacting laws and bylaws governing organic production, issuing authorisations to perform professional control and certification of organic production, supervising control bodies, establishing and maintaining the Register of Entities in Organic Production and is the administrative source of data in the field of organic production. Organic production. In addition, the MAFWM is a body that cooperates with international organisations and competent authorities of other countries in the field of organic production and performs other tasks in accordance with the Law on Organic Production. Data related to organic production are submitted annually to the Directorate of Statistics (Monstat), as well as to the Research Institute of Organic Agriculture (FiBL). The Directorate for Statistics further forwards this data to Eurostat for validation and publication.

In addition to the MAFWM, the IPARD operational structure, consisting of the Directorate for Rural Development as the managing authority and the Directorate for Payments as the implementing body, plays a significant role in the existing institutional system. Other related state administration bodies, such as the Directorate for Food Safety, Veterinary and Phytosanitary Affairs, also play an important role, whose competencies are directly related to the policy of agriculture and rural development.

4.3. Control system

According to the Law on Organic Production, a legal entity—a control body authorised by the MAFWM—determines compliance with the requirements for establishing organic production, controls it, and issues certificates for products obtained by organic farming methods. In accordance with the regulations for organic production, control bodies that carry out control and certification on the territory of Montenegro are obliged to have authorisation from the MAFWM.

The Accreditation Body of Montenegro, in accordance with the MEST EN ISO/IEC 17065 standard, performs accreditation of control bodies, which is one of the conditions for obtaining authorisation by the MAFWM to perform control and certification activities in organic production. In 2023, the Accreditation Body of Montenegro (ATCG) signed a multilateral agreement with the European Accreditation Cooperation (EA), which confirmed that ATCG is in an equivalent position with the national accreditation bodies of the European Union countries.

For the performance of control and certification in organic agriculture according to the requirements of the MEST EN ISO/IEC 17065 standard, only one control body is currently accredited in Montenegro **- Monteorganica d.o.o.**, which is not recognised by the EU. It was registered in 2005 and was authorised to perform control and certification in organic production in 2006. Monteorganica d.o.o. has initiated a procedure with DG AGRI to expand the scope of accreditation to initiate the procedure for inclusion in the list of EU-recognized control bodies for the field of organic production, intending to enable the export of organic products from Montenegro to the EU market in accordance with the EU Regulation 848/2018.

The MAFWM shall carry out inspection supervision over the implementation of the Law on Organic Production and regulations adopted on the basis of this Law through agricultural inspectors, food inspectors, border official veterinarians, and border phytosanitary inspectors.

Authorised official laboratories perform laboratory analyses and examinations of samples taken during professional control and certification and during the implementation of official controls and other official activities.

4.4. Harmonisation of agricultural legislation with the EU acquis

Following the national legal framework, Montenegro, as a candidate country for membership in the European Union, has undertaken the obligation to harmonize national legislation in the field of organic production with the new EU Regulation 2018/848. EU Regulation 2018/848 entered into force in the EU on 1 January 2022 and introduced many changes, including rules on strengthening control systems. Bearing in mind the fact that since the adoption of the previous Law on Organic Production in 2013 until today, it has not been amended and supplemented, then it is completely clear that the MAFWM has set the adoption of the new Law on Organic Production and relevant bylaws as its priority task.

Adopting the new Law on Organic Agriculture provides the basis for the sustainable development of organic production while ensuring the efficient functioning of the market for organic products and fair competition. In addition, it will create conditions for increasing domestic production, greater trust and protection of consumer interests, encouraging short distribution channels, but also influencing other processes that are important for the environment. Consistent compliance with the general and specific production conditions applicable to organic production will make it possible to achieve these objectives. The draft law will solve some problems identified as obstacles to the development of organic production, as well as concerns about the sustainability of organic production, the preservation of biodiversity, and the reduction of the use of pesticides and other harmful products and substances. In addition to the above, the regulation mentioned above will solve problems in the part of import and import, as well as the implementation of control and certification, official controls and inspections that have not been legally regulated so far to the extent and in the manner prescribed by EU Regulation 2018/848. What is particularly important is that with this law's adoption, Montenegro will be another step closer to closing the negotiation in Chapter 11.

The Working Group for drafting the new Law on Organic Production has drafted this bill per EU Regulation 2018/848. As an integral part of this Act, the provisions of EU Regulation 625/2017 (Official Controls) relating to organic production have been transposed, concerning:

- carrying out official controls and other official activities that ensure a high level of food and feed safety, human, animal and plant health and animal welfare;
- rules that could impact the protection of consumers' interests, organic production, the use of protected designations of origin, protected geographical indications, and indications of traditional specialities guaranteed, as well as the labelling of these indications.

In addition to the associates of the MAFWM, experts from the Biotechnical Faculty and the Directorate for Food Safety, Veterinary and Phytosanitary Affairs also participated in the drafting of this law. Still, significant support was also provided by international experts from MOAN (Mediterranean Organic Agricultural Network), TAIEX (European Commission's Technical Assistance and Information Exchange Instrument), as well as those provided through the SWG (Standing Working Group on Regional Rural Development) programs. In August 2024, the Draft Law on Organic Production was sent to the Parliament of Montenegro, and its adoption is expected soon. Based on this Act, it is planned to adopt nine bylaws (Annex 2).

By merging the EU Regulation 2018/848 and the EU Regulation I 625/2017 into a new law, in addition to the existing Law on Inspection Supervision and the Law on Administrative Procedure, the field of organic production will be fully regulated.

5. FINANCIAL SUPPORT FOR THE ORGANIC SECTOR

Support in the sector for organic production is implemented in accordance with the Law on Agriculture and Rural Development ("Official Gazette of Montenegro", No. 56/09, 34/14, 1/15, 30/17 and 59/21), the Law on Organic Production ("Official Gazette of Montenegro", No. 56/13), the Decree on the Conditions, Manner and Dynamics of Implementation of Agrarian Policy Measures (Agrobudget) and in accordance with the Programme for the Development of Agriculture and Rural Areas of Montenegro within IPARD. After adopting the new Law on Organic Production, which is harmonised with the EU 2018/848, the conditions for providing support to organic production through measures 4 of the IPARD III program, which recognizes organic production and whose accreditation is in progress, are acquired. All support measures are implemented based on the aforementioned legal regulations, which define the conditions and manner of exercising the right to support in more detail. Organic producers registered in the Register of Agricultural Holdings and the Register of Organic Production Entities are entitled to support.

Since 2018, with the help of the MIDAS project, two support measures compatible with the EU have been activated – organic production and direct payments for crop production. The adaptation of national measures in the field of rural development with the help of MIDAS grants (2015) and IPARD-like (supported by the EU IPA) program has led to the harmonisation of measures, the adoption of the IPARD II program, and the accreditation of the Directorate for Payments as an IPARD Agency.

Support for organic producers is provided through national (Agrobudget) and EU funds (IPARD program). As part of the Agrobudget for 2024, support to the organic production sector took place through the following measures:

1. Supporting organic production;
2. Supporting the promotion and marketing of organic products;
3. An additional 10% of support to organic producers under other public calls;
4. Support in the transition period;
5. Supporting the conservation of indigenous genetic resources in agriculture;
6. Free inspection and certification services.

5.1. Support for organic production – direct payments

In terms of allocated budget funds, direct payments are the most important type of support, which results in a continuous increase in arable land under organic production, an increase in livestock, and an increase in the number of organic producers. Direct payments for organic production are implemented through the Integrated Administration and Control System (IMS). IACS (Integrated Administrative and Control System) is implemented by the Directorate of Payments. Support in crop production is realised per hectare, and in livestock production by the conditional head of livestock, the number of poultry beaks and hives. With the accreditation of Measure 4 of the IPARD III program, EU funds will finance these activities.

5.2. Rural development measures

Support for the promotion and placement of organic products

In accordance with the new Common Agricultural Policy (CAP) of the EU and the Green Agenda as an integral part of it, a measure has been created for the promotion and placement of organic products to raise their quality and greater recognition in the market, strengthen competitiveness and to increase the overall production of organic products. This support can be used by producers who produce organic products and use the organic production mark (logo) when labelling, advertising and presenting organic products on the market.

Supporting the conservation of indigenous genetic resources in agriculture

Montenegro, as a member of the UN and a candidate country for EU membership, is obliged to implement measures for the conservation and sustainable use of genetic resources on its territory in accordance with international conventions and principles. Due to their low productivity, the conservation and sustainable use of indigenous populations requires adequate financial support from the budget. The conservation and sustainable use of genetic resources in agriculture is essential for the sustainable development of agricultural production, food security, and adaptation to climate change, as well as for the socio-economic development and well-being of rural areas. Stimulating farms to cultivate genetic resources contributes to the conservation of overall biodiversity and the conservation and sustainable use of endangered indigenous species/varieties/races. This support is carried out in crop and livestock production.

5.3. Actions under the IPARD programme

This program will finance investments in the modernisation of agricultural holdings, the improvement of existing and new processing capacities, the improvement of rural infrastructure, rural tourism, and the establishment and protection of forests. These measures aim to improve the competitiveness of production, increase the added value of products, create new jobs, improve living conditions in rural areas, support organic production and its connection with tourism, improve rural infrastructure, etc. So far, the following measures have been accredited:

Measure 1: Investments in physical capital of agricultural holdings - This measure is intended to support primary production, and which, in addition to improving agricultural holdings, raising the level of competitiveness and full harmonisation with EU standards, aims to strengthen the position of farmers in the food production chain and provide support to young farmers. This measure supports the construction, expansion, and reconstruction of facilities, the procurement of dedicated equipment and machinery, irrigation systems, planting material for perennial plantings, and investments in improving soil quality.

Measure 3: Investments in physical capital related to the processing and marketing of agricultural and fishery products - This measure is intended to support processing capacities and aims to improve food business entities so that they meet EU standards in terms of food safety and have the possibility of unhindered marketing of products. This measure supports the construction, reconstruction and equipping of facilities for the reception, processing, and storage of products; purchase of dedicated equipment and machinery; arrangement of infrastructure; construction, reconstruction and equipping of plants for the production of energy from renewable sources; Investments in equipping systems for energy saving, environmental protection, equipment and means for the reprocessing of raw materials and processing, treatment and disposal of waste and by-products.

Measure 6: Investments in public rural infrastructure - This measure is intended to improve infrastructure in rural areas, facilitate community and business development, and increase employment.

Measure 7: Diversification of the farm and business development - This measure is intended to support investments in rural tourism, processing on the farm, and the development of crafts.

Action 4: Agro-ecological-climate and organic production measure -These measures aim to contribute to the implementation of the Green Agenda for the Western Balkans, enable the sustainable development of agriculture and rural areas, and mitigate climate change and agricultural adaptation. They will focus on organic farming, adequate management of mountain pastures, and the conservation of Indigenous genetic resources. Accreditation of this measure is underway.

5.4. Measures supported by the Environmental Protection Fund (Eco-Fund)

These measures support agricultural practices aimed at protecting biodiversity and preserving indigenous genetic resources in agriculture and supporting producer associations and organisations, cooperatives, cluster formation, education, etc.

5.5. Other support measures

Within other public calls, an additional 10% of support is allocated to organic producers, which refers to procuring machinery, equipment, irrigation systems, seed and planting material, construction of wells, adaptation of facilities, etc.)

6. INSTITUTIONS IMPORTANT FOR SUPPORTING THE ORGANIC SECTOR

Institutions supporting the organic sector play a key role in developing and promoting Montenegrin organic production. They provide significant services to organic sector participants, from producers' education and consulting to product certification and promotion on the market. In addition, they contribute to connecting producers, processors, traders and other actors in the value chain. They are important support for scientific research in the field of organic production, and they also provide easier access to funds and other forms of support for the development of organic production. The most important institutions that support the organic sector in Montenegro are:

The Ministry of Agriculture, Forestry and Water Management plays a key role in the development and promotion of organic production in the country. With its programs and measures, it supports the entire sector of organic production, which ensures the quality of organic products and their availability on the market. It also encourages producers to switch to organic production.

The Biotechnical Faculty of the University of Montenegro (BTF) is a leading higher education and research institution in the field of agriculture. It educates young people and creates and applies new knowledge to meet the needs of the long-term sustainable development of Montenegrin agriculture and rural areas. Researchers at BTF conduct numerous research projects focused on adapting organic production systems to the specific conditions of Montenegro, studying varieties resistant to diseases and pests, plant nutrition in organic production systems, etc. A significant part of the research is dedicated to studying agrobiodiversity and its role in sustainable agricultural systems. BTF researchers

closely cooperate with agricultural producers to solve practical problems and improve production. In addition, BTF is involved in the development of important strategic documents in the field of agriculture, conducting studies and sectoral analyses, and the implementation of numerous budgetary programs, farmer training, and so on.

IPARD (Instrument for Pre-Accession Assistance for Rural Development) is a program that significantly contributes to the development of Montenegrin agriculture. The Programme for the Development of Agriculture and Rural Areas of Montenegro within IPARD III 2021-2027 was developed based on strategic and other documents related to agriculture and rural development, as well as socio-economic and SWOT analysis of Montenegrin agriculture and rural areas. The European Union funds the IPARD III programme and provides significant financial support to agricultural producers.

The Chamber of Commerce and Industry of Montenegro, as an umbrella institution that represents the interests of all business entities, plays an important role in supporting the development of organic production. The Chamber connects organic producers with other relevant stakeholders, such as processors, distributors, traders, research institutions and non-governmental organizations. The Chamber actively promotes organic products on the domestic and international markets, organizes fairs and other promotional activities. In this way, it contributes to increasing the recognition and competitiveness of Montenegrin organic products.

The Food and Agriculture Organization of the United Nations (FAO) provides great support for the promotion and development of organic production worldwide. As a specialised agency of the United Nations for Food and Agriculture, FAO provides comprehensive support in developing sustainable and environmentally friendly agricultural systems, where organic production is one of the priorities. This organisation supports the development of strategic documents and helps harmonize agricultural policy and rural development with EU standards. It implements various pilot projects in the field of organic production, provides various forms of expert support for farmers, advisors, inspectors and other actors in the field of organic production, organises study trips for organic producers, etc.

The MIDAS project (Institutional Development and Strengthening of Agriculture in Montenegro) has significantly impacted the development of organic production in Montenegro. Although the primary objective of the project was to strengthen agricultural institutions and prepare for accession to the European Union, MIDAS also provided significant support to the organic production sector, which was reflected in financial support for the procurement of equipment for processing, storage and packaging of products, as well as for the adaptation of existing facilities. Such investments have improved production conditions and enabled better competitiveness of organic products in the market. It also significantly connected agriculture and rural tourism, which had special benefits for organic food producers. This synergy enables the direct sale of products to tourists and the development of agritourism.

Local governments provide significant support to the organic sector in Montenegro by providing their own administrative capacities (field and administrative control). In addition, from their own budget, they support organic producers from their territory, organise agricultural fairs, and provide information on the state of agriculture in their municipality and guidelines for further development. They closely cooperate with other state institutions in the field of agriculture (MAFWM, BTF, Directorate for Food Safety, Veterinary and Phytosanitary Affairs (DFSVPA), Public institution “Specialist Veterinary Laboratory”, etc.).

The Innovation Fund of Montenegro is an important partner in developing Montenegrin agriculture. Its primary role is to encourage innovation and the development of new technologies. In the context

of organic production, this fund can provide grants to finance projects that develop new methods in organic production and support the commercialization of innovative products and services, thus opening up new markets and increasing competitiveness. The Fund supports cooperation between agricultural producers and scientific institutions to develop new knowledge and technologies.

SWG (Standing Working Group on Regional Rural Development), as a platform for networking and regional cooperation in the field of agriculture and rural development, has helped to improve agricultural policy and create more favourable conditions for the development of organic production in Montenegro. SWG continuously provides Montenegrin agriculture with significant expert assistance for developing legislation, strategies, action plans, sectoral studies, etc. In addition, it organises workshops, trainings and study visits to the countries of the region and the European Union for all participants in the organic production sector. It plays a very important role in connecting agricultural producers, processors, research institutions, non-governmental organisations and state institutions, contributing to better coordination and more efficient support to the organic production sector.

TAIEX (the European Commission's Technical Assistance and Information Exchange Instrument) plays an important role in supporting the development of organic production in Montenegro. As an instrument that enables the direct exchange of knowledge and experience between EU Member States and candidate countries, TAIEX has provided concrete assistance in harmonising Montenegrin legislation and practice with European standards in organic production.

The Mediterranean Organic Agricultural Network (MOAN) is a key platform for exchanging knowledge, experiences and best practices in organic agriculture in the Mediterranean region. This network comprises partners from 24 countries and aims to encourage the development of sustainable organic agriculture and promote its benefits. This network enables direct communication and cooperation between different actors, which is crucial for the sector's development. MOAN provides expert support to decision-makers and influences the design of agricultural policies that favour organic production.

Twinning projects have proven to be very useful in the process of harmonization of Montenegrin legislation with the standards of the European Union, especially in the field of agriculture. Through direct cooperation with experts from EU Member States, Montenegro had the opportunity to take over best practices and build its capacities to develop and control organic production. Through the EU Twinning project "Capacity Building in the Agriculture and Rural Development Sector for the Implementation of the CAP in Montenegro" in the period 2024-2026, experts from the EU will provide expert support to the Ministry of Agriculture and Rural Development in the field of capacity building, implementation and control of rural development measures, cross-compliance (enhanced conditionality) and organic production, quality schemes, beekeeping, olive growing and common market organisation.

The International Fund for Agricultural Development (IFAD) plays an important role in supporting the development of organic production in Montenegro. As a specialised UN agency focused on reducing rural poverty, IFAD has recognised the potential of organic agriculture as a tool to advance sustainability, increase farmers' incomes, and conserve natural resources. IFAD provides funding for projects that promote organic production. These funds are used for investments in farms (equipment for processing, storage and packaging, as well as adaptation of existing facilities for the needs of organic production), infrastructure development (construction or improvement of road infrastructure, irrigation systems and other infrastructure projects necessary for the development of organic production) and support to producer organisations (formation and strengthening of clusters, etc.).

7. Strategic goals, measures for implementation and key performance indicators.

The organic sector in Montenegro represents significant potential for economic growth and environmental sustainability, mitigating the effects of climate change and improving public health. Considering that interest in this type of production is growing, in addition to the already existing measures, it is necessary to support this sector further. That is why it is very important to create such measures that would contribute to the recognition of the added value of domestic organic products on the market, leading to a further increase in the number of organic producers and areas under organic production. This strategic plan will be implemented through 4 strategic objectives, 15 measures and many actions for their implementation. Its implementation would remove the obstacles that currently prevent the growth and development of organic production and provide new incentives for the sustainable development of organic food production and the processing industry. Implementing this strategic plan requires coordinated action by all participants in the value chain, including state-level institutions, local governments, agricultural producers, processors, retail chains, NGOs, international donors, etc.

Strategic Objective 1: Production and processing

Increasing the volume of organic production and developing processing capacities is a key step in developing organic agriculture in Montenegro. In this way, Montenegro would become known in the region for producing and exporting high-quality organic products.

Goal: Increase the volume of organic production and processing to meet the growing consumer demand for organic products while preserving natural resources, and biodiversity and sustainable rural development.

To achieve this strategic objective, the following measures have been defined:

Measure 1a:	*Support for producers*
Measure 1b:	*Support to the processing sector*
Measure 1c:	*Supporting the development of rural areas*

Performance indicators until 2028 compared to 2024:

- Certified areas under organic production increased to 1,500 ha, and areas for the collection of wild medicinal herbs and forest fruits to 150,000 ha
- The number of organic producers has increased to 750
- Increase in average yields in crop production by 20%
- Organic production in livestock increased by 20%
- Increased number of domestic organic products on the market
- Producers have access to the necessary inputs and services

Strategic Objective 2: Market Development and Promotion

Montenegro has excellent natural conditions for the production of high-quality organic products. However, to fully exploit this potential, it is necessary to take a series of strategic steps to develop and promote the organic product market. Finding a market for organic products is a major challenge, especially for small producers, due to the small volume of their production and the lack of a developed distribution network. The organic market development represents a significant opportunity for sus-

tainable economic growth and improved food security. However, this process requires a series of coordinated activities covering various aspects of agriculture, processing, marketing and public policies.

Goal: Develop domestic and international organic markets by raising public awareness of the benefits of organic food, organising educational workshops and marketing campaigns, expanding sales channels, strengthening distribution logistics and improving access to markets.

To achieve this strategic objective, the following measures have been defined:

Measure 2a:	*Promotion of organic products*
Measure 2b:	*Supporting the participation of organic producers, processors and traders in fairs, exhibitions and promotional events to present their products*
Measure 2c:	*Supporting the branding of organic products as high-quality and authentic*
Measure 2d:	*Supporting the establishment and promotion of direct sales channels for organic products*
Measure 2e:	*Facilitation of administrative procedures*

Performance indicators until 2028 compared to 2024:

- Growth of all indicators of at least 5% per year
- National logo for organic production increasingly well-known in the national market
- Trust in domestic organic products is growing
- Increased number of outlets for organic products

Strategic Objective 3: Regulations, Certification and Control, Policies

One key factor for the successful development of the organic products market is the existence of a clear, transparent, and effective legal framework, certification, and control. Such a system increases the confidence of consumers, producers, and retailers that the products are really produced according to organic production methods.

Goal: Improve policies and regulatory frameworks that foster the growth of the organic sector, strengthen consumer confidence in the organic system, and ensure that products on the market are produced according to the same rules as those in the EU.

To achieve this strategic objective, the following measures have been defined:

Measure 3a:	*Continuous harmonisation with EU legislation*
Measure 3b:	*Development of a database of producers and certified organic products and establishment of a methodology for collecting data on organic production*
Measure 3c:	*Improving the control system and strengthening the capacity of control bodies*

Performance indicators until 2028 compared to 2024:

- Organic regulation in line with the organic regulations of the European Union
- The National Control Authority is accredited for export and recognised by the European Union.
- Established Database of Authorized Control Bodies
- Increased inspection of organic products on the market
- A centralised register of all organic producers, producers, and processors

Strategic objective 4: Research, education, training, advisory services

Establishing a successful organic sector requires continuous investment in the knowledge and skills of all actors in the value chain. Through research, education, training and advisory services in organic production, the foundations are created for innovation, increasing productivity and product quality.

Goal: Supporting research and innovation in the organic sector to technologically improve organic farming and increase the productivity and quality of organic products.

In order to achieve this strategic objective, the following measures have been defined:

Measure 4a:	*Increase the level of knowledge about organic production*
Measure 4b:	*Support for research and innovative programs through cooperation between farmers, advisory and scientific organisations*
Measure 4c:	*Strengthen the role of advisory services*
Measure 4d:	*Strengthening international cooperation*

Performance indicators until 2028 compared to 2024:

- Established a system of regular training for producers, processors, consumers, advisors, controllers and inspectors to follow regulations and the latest trends in the field of organic production
- Increased number of innovative projects for the development of new products and technologies in organic production, as well as their application in practice
- Advisory services active in supporting organic producers at all levels, from initial conversion to improvement of existing production
- Actors in the field of organic production involved in international projects and initiatives

8. Action Plan

Strategic Objective 1: Production and processing

Measure	Description of the measure (Action to be taken)	Source of funding	Responsibility	Support	Implementation period
1a	Direct payments per unit of production Grants for the purchase of organic seeds, seedlings and other inputs Support for young farmers, young beginner farmers and women (additional benefits, priority in the course of application ranking) Assistance in accessing EU funds Support in the certification process following the example of European countries Support for the introduction of group certification for smaller manufacturers Support for the transition to organic production Support for the cultivation of plant and animal genetic resources in the organic production system Support for the production of certified organic seeds and planting material Supporting the formation of clusters for joint promotion, development of new products and more efficient distribution. Enabling priority and long-term lease of state-owned agricultural land	Agrobudget IPARD Local governments	MAFWM	FAO IFAD	Long term
1b	Support to producers through grants and favourable loans for investments in processing capacities Introduce guarantee funds to facilitate access to credit for small and medium-sized enterprises engaged in the processing of organic food Introduce tax incentives for investments in manufacturing capacities and for the employment of new workers	Agrobudget IPARD	MAFWM	MIDAS	Long term

Measure	Description of the measure (Action to be taken)	Source of funding	Responsibility	Support	Implementation period
1c	Support for infrastructure development (construction and maintenance of roads, improvement of telecommunications infrastructure, water supply and sewerage, etc.) Integration of organic production into the national agricultural policy Support for projects that contribute to the development of rural areas (infrastructure construction, tourism development or entrepreneurship) Support for projects that contribute to the conservation of natural resources Support to other activities that contribute to stopping the emigration and depopulation of villages	Agrobudget IPARD IFAD	MAFWM	EU grant Ministry of ecology, sustainable development and development of North Innovation Fund ECO_FUND	Long term

Strategic Objective 2: Market Development and Promotion

Measure	Description of the measure (Action to be taken)	Source of funding	Responsibility	Support	Implementation period
2a	Promotional campaigns (media, social networks, events, publications, workshops, tastings) for priority groups of consumers and for specific products and activities to raise awareness of the importance of buying and using organic food Organizing fairs, conferences, business forums and other events that will connect producers, processors, traders, hotels, restaurants and consumers Support for producers and retail chains for the marketing and promotion of organic products Conducting regular consumer information campaigns Supporting the labelling and packaging of organic products Promotion of domestic organic products in the foreign market	Agrobudget Chamber of Commerce Local governments	MAFWM Local governments	FAO SWG BTF	Long-term
2b	Establishment of an organic production fair in Montenegro and inclusion of organic production in existing agricultural fairs Covering the entire costs of Montenegrin producers' participation in international organic food fairs and conferences Support to the marketing and promotion of Montenegrin organic products at international fairs and exhibitions	Agrobudget Chamber of Commerce Local governments	MAFWM Local governments		Long-term

Measure	Description of the measure (Action to be taken)	Source of funding	Responsibility	Support	Implementation period
2c	Supporting the development of new value-added products Creating a brand for Montenegrin organic products Promotion of traditional Montenegrin products in an organic version	Agrobudget EU grant Innovation Fund			Long-term
2d	Supporting the establishment and promotion of direct sales channels for organic products Establish regional centers for the processing and distribution of organic products Support the market integration of organic farms Setting up online sales on the model of some other areas of agriculture Incorporating organic products into existing school nutrition schemes. Promoting the consumption of organic products among the local population Linking organic production with rural, eco and health tourism Prioritizing organic products in public procurement Conduct regular market research to identify potential customers and trends in demand for organic products. Creating special corners for organic products in supermarkets	Agrobudget Local governments	MAFWM	MIDAS FAO Ministry of ecology, sustainable development and development of North BTF	Long-term
2e	Reduce administrative barriers to the import and export of organic products. Establish a legal basis for the official sale of organic products on the doorstep		MAFWM		Short-term

Strategic Objective 3: Regulations, Certification and Control, Policies

Measure	Description of the measure (Action to be taken)	Source of funding	Responsibility	Support	Implementation period
3a	To align national legislation with EU acquis in order to facilitate access to the European market and ensure a high quality of products		MAFWM UBHVFP	MOAN TAIEX SWG Twining program	2025-2027.
3b	Establish a system and methodology for collecting and processing data Ensure compliance with national and international standards Ensure data protection		MAFWM	MONSTAT TAIEX	Long-term
3c	Introduce a simple and transparent certification procedure that will be accessible to all manufacturers Strengthening the capacity of institutions in charge of organic production Establish a Register of Authorized Control Bodies for Control and Certification Encourage EU control bodies to engage in the certification of organic production in Montenegro, which will lead to faster adoption of standards Support to the National Control Body for the extension of the scope of accreditation for the export of organic products in order to be recognised by the EU Ensuring effective quality control of organic products in the market Ensure that all organic products in Montenegro are produced and controlled in accordance with EU standards Provide a sufficient number of laboratories and inspectors for effective quality control of organic products.	Agrobudget MIDAS	MAFWM UBHVFP	MOAN TAIEX SWG Twining program	Long-term

Strategic Objective 4: Research, education, training, advisory services

Measure	Description of the measure (Action to be taken)	Source of funding	Responsibility	Support	Implementation period
4a	To organise trainings, seminars, workshops, conferences, study trips and other educational events for farmers, advisors, researchers and other participants in the organic production sector on the principles of organic production, modern processing technologies, quality standards and food safety Prepare and distribute manuals, brochures, video materials and other educational materials on organic production Organize national promotional campaigns on the benefits of organic production, organic products and the promotion of the national label for organic products Establish the education of primary and secondary school students (summer schools, visits to organic farms, etc.)	Agrobudget Local governments	MAFWM Advisory services Local governments	Chamber of Commerce FAO SWG BTF	Long-term
4b	To support innovation in organic production and its application in practice (development of new products and technologies for the processing of organic products) Support for the construction of laboratories for the needs of control and the development of innovative technologies Increased state support in the form of grants to universities, institutes, the private sector, start-ups and non-governmental organisations for innovative projects in the field of organic agriculture (new varieties, agrotechnical measures, plant protection, processing, precision agriculture, use of renewable energy sources, establishment of appropriate digital platforms) Supporting the use of renewable energy sources Encourage farmers to use smart farming tools to save resources and increase productivity. Introduce regular market surveys and consumer preferences	Agrobudget	MAFWM	EU grant IPARD Innovation Fund Ministry of Education, Science and Innovation BTF MIDAS FAO	Long-term
4c	Intensified participation of advisory services, universities, domestic and international experts, renowned institutions and organisations in the field of organic production to establish a network for knowledge transfer Train advisors to provide specialised services to farmers for the transition to organic production Provide manufacturers with free or subsidized advisory services on business development, marketing, finance, and legal issues.		MAFWM Advisory services	BTF TAIEX SWG	Long-term
4d	Establish cooperation with international organisations and institutions in organic production, especially from countries with a developed organic production sector.			SWG MOAN EU grant	Long-term

9. Annexes

Annexe 1: SWOT analysis of the organic sector in Montenegro

Strengths	Weaknesses
Abundance of natural resources (clean air, untouched nature and unpolluted land) Growing demand for organic products, both in the domestic and foreign markets Rich agrobiodiversity (availability of numerous varieties, species and races of indigenous populations of cultivated plants and animals) Producers' Interest in Organic Food Recorded Possibility of connecting with eco, health and rural tourism Organic production control and certification is free of charge for producers. Organic Production Included in Formal Education Recognized potential of organic production at the state level (improved and diverse state support measures)	A relatively small share of total agricultural production Low level of knowledge and skills in the manufacturer Lack of adequate processing capacity Lack of competition and difficulties in product placement, both in the local and foreign markets Unfavourable geographical trends (depopulation and ageing of rural areas) Labor shortage Lack of organic inputs Poor infrastructure in rural areas Underdeveloped advisory service for organic production Weak purchasing power of the population Lack of consumer education, poor promotion and marketing Lack of quality forms of association and lack of interest in association Lack of initiatives to introduce organic meals in state institutions There is no comprehensive national strategy for organic production.
Opportunities	**Threats**
The steady growth of the global organic food market Investment in technological equipment and development of the manufacturing sector Branding of production based on the quality and authenticity of the product Development of new, innovative organic products for specific demand Greater support for young farmers and women to engage in organic production Support for the transition from conventional to organic production Integration of organic production and tourism offer Strengthening the marketing of organic products Strengthening the advisory service and research in the field of organic production Increasing the use of IPADR funds, as well as other sources of funding Support for the establishment of group certification to reduce the costs of control and certification Development of innovative programs for organic production Greater support at the local level.	Strong competition from other markets, especially from developed countries. The growing threat of climate change High input costs Further depopulation of rural areas New diseases and pests Lack of interest in organic farming Price fluctuations of organic products Unfair competition (promoting products as organic, even though they are not organic) Lack of cooperation between entities within the value chain Non-compliance with EU standards Too many administrative procedures. Lack of coordination and support from the authorities.

Annexe 2: Harmonization of Legal Legislation in the Field of Organic Production

Title of the legal act	Deadline for adoption	Relevant EU regulative
Law on organic production	2024/III	32018R0848 [P] 32020R0427 [P] 32020R2042 [P] 32021R1691 [P] 32021R0642 [P] 32021R0771 [P] 32021R0715 [P] 32021R0279 [P] 32020R1794 [P] 32017R0625 [P]
Rulebook on detailed rules and conditions for plant and livestock organic production	2025/I	32018R0848 [P] 32020R0427 [P] 32021R0716 [P]
Rulebook on detailed conditions and rules for processing, packaging, transport and storage of organic products	2025/II	32018R0848 [P]
Rulebook on the method and methodology of professional control in organic production	2025/III	32018R0848 [P] 32021R1691 [P] 32023R0207 [P] 32021R1006 [P]
Rulebook on detailed conditions and rules for the import and export of organic products	2025/IV	32018R0848 [P] 32023R1202 [P] 32023R0186 [P] 32022R2047 [P] 32022R2049 [P] 32021R2325 [P] 32021R2306 [P] 32021R2307 [P] 32021R2305 [P]
Rulebook on the content and size of the organic production sign	2025/IV	32018R0848 [P] 32021R0642 [P]
Rulebook on detailed rules and conditions for organic production of animals, aquaculture and seaweed	2026/II	32018R0848 [P] 32021R0716 [P]
Rulebook on detailed rules and conditions for the group of subjects in organic production	2026/IV	32018R0848 [P] 32021R0771 [P] 32021R0715 [P]
Rulebook on detailed rules and conditions for the production and use of inorganic seedlings, seedlings from the transition period organic seedlings and other plant reproductive material and placing on the market plant reproductive material from organic heterogeneous material of certain genera or species	2027/II	32018R0848 [P] 32022R0474 [P] 32020R0464 [P] 32020R1794 [P] 32021R1189 [P]
Rulebook on the implementation of official controls	2027/III	32017R0625 [P] 32018R0848 [P] 32021R0771 [P] 32021R0279 [P]

10. Abbreviations

ABM	Accreditation Body of Montenegro
BTF	Biotechnical Faculty of the University of Montenegro
CAP	Common Agricultural Policy
DFSVPA	Directorate for Food Safety, Veterinary and Phytosanitary Affairs
ECO-FUND	Environmental Protection Fund
FAO	Food and Agriculture Organization of the United Nations
IFAD	International Fund for Agricultural Development
IPARD	Instrument for Pre-Accession Assistance in Rural Development
MIDAS	Institutional development and strengthening of agriculture in Montenegro
MOAN	Mediterranean Organic Agriculture Network
MONSTAT	Directorate for Statistics of Montenegro
MAFWM	Ministry of Agriculture, Forestry and Water Management
REAWG	Regional Expert Advisory Working Group
SWG	Regional Rural Development Standing Working Group of South Eastern Europe
SWOT	Analysis of Strengths, Weaknesses, Opportunities and Threats
TAIEX	European Commission's Technical Assistance and Information Exchange Instrument

11. Literature

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National Sustainable Development Strategy for 2030 (https://www.gov.me/dokumenta/67dc487e-097d-41d2-8fd5-7827a19a1f5a)

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Organic farming- action plan for the development of EU organic production (europa.eu)

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REPUBLIC OF NORTH MACEDONIA

MINISTRY OF AGRICULTURE FORESTRY AND WATER MANAGEMENT OF REPUBLIC NORTH MACEDONIA

THE ORGANIC ACTION PLAN OF THE REPUBLIC OF NORTH MACEDONIA 2024 – 2027

November 2024.

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Preface

This proposed study/publication is the result of project activities carried out by the Permanent Working Group on Regional Rural Development (SWG) in cooperation with the Ministry of Agriculture, Forestry and Water Economy of the Republic of North Macedonia, aimed at promoting organic production in the Republic of North Macedonia for the period 2024 – 2027. The document includes an analysis of the state of organic production in the country, with its strengths, weaknesses, opportunities, and threats affecting the organic sector, as well as strategic, specific objectives and an action plan for their implementation.

Although it was developed with significant assistance and collaboration from the departments for plant and organic production at the Ministry of Agriculture, Forestry and Water Economy, the content presented reflects solely the views and opinions of the author, and therefore cannot be treated as a national, strategic, or official government document, nor binding for the Ministry. Additionally, a document of this nature should have a comprehensive and cross-sectoral approach involving all stakeholders, including governmental and non-governmental organizations, as well as primary agricultural producers, food operators, and other actors in organic farming.

Certain aspects of the analysis and recommendations may serve as useful reference points in future planning or policy-making processes by the Ministry. Therefore, should the Ministry of Agriculture, Forestry and Water Economy wish to use any part of this document in future strategic documents and analyses, it may do so freely without the need for explicit permission from the author.

I hope that this document will constructively contribute to the further development of the organic sector in the Republic of North Macedonia and inspire additional initiatives.

Prof. D-r Zoran Dimov
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ACRONYMS AND ABBREVIATIONS

EU	European Union
FAO	Food and Agriculture Organization (of the UN)
IPA	Instrument for Pre-Accession Assistance
IPARD	Rural Development Component of the Instrument for Pre-Accession Assistance
RNM; MAFWE; MES	Republic of North Macedonia; Ministry of Agriculture, Forestry, and Water Economy; Ministry of Education and Science
SSO	State Statistical Office
SWOT	Analysis of Strengths, Weaknesses, Opportunities, and Threats
WTO	World Trade Organization
FPOPM	Federation of Organic Product Producers of Macedonia
AFSARD	Agency for Financial Support in Agriculture and Rural Development
APRD	Agency for Promotion of Agricultural Development
NGO	Non-Governmental Organizations
FiBL	Forschungsinstitut für biologischen Landbau The Research Institute for Organic Agriculture)
IFOAM	International Federation of Organic Agriculture Movement
NSARD	National Strategy of Agriculture and Rural Development
SDC	Swiss Agency for Development and Cooperation
IME	Increase Market Employability

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1. INTRODUCTION

Organic agricultural production, as one of the production systems in agriculture, plays a significant role in the development of the agricultural sector in the Republic of North Macedonia. It contributes to the protection of ecosystems, sustainable use of natural resources, and social justice, and, like other integrated agro-ecological practices, directly contributes to rural development in the country.

In National Strategy with Action Plan for Organic Production in Republic of Macedonia (2008 – 2011), the Ministry of Agriculture, Forestry and Water Economy (MAFWE) has adopted the following strategic goal as the basis for agricultural and rural development and for formulating agricultural policy:

To strengthen the ability of Macedonian agriculture to compete in regional integrated markets in the European Union and Southeast Europe through measures that will increase the efficiency of agricultural production, processing industries, and marketing, and to build appropriate effective public and private institutions; to increase farmers' incomes; to provide consumers with access to healthy and safe food; to optimize the use of scarce land, forest, and water resources in an ecologically sustainable way; and to build sustainable rural communities through sustainable rural development.

From this, the objective of the Study with an action plan for organic production in the Republic of North Macedonia for the period 2024 – 2027 corresponds with the two previously developed National Strategies with Action Plans for Organic Agriculture in the Republic of North Macedonia for 2008 - 2011 and 2013 – 2020. The goal is *to support the further development of organic agriculture, provide proposed measures for its expansion, strengthen cooperation among all stakeholders involved in the sector, enhance market-oriented organizations and forms of associations, increase knowledge about the principles of organic agriculture among producers and consumers, and build expert capacities that will work on the future development of organic agriculture in the Republic of North Macedonia.*

2. ORGANIC AGRICULTURE IN THE INTERNATIONAL CONTEXT

2.1. Historical Development of Organic Agriculture

The development of organic agriculture (initially referred to as the organic movement) over the past seventy years can be divided into three main periods: i) the emergence period (1924 – 1970), ii) the expansion period (1970 – 1990), and iii) the development period (post-1990) (Shi-ming & Sauerborn, 2006).

The first period is characterized by individuals who made the most significant contributions to the concept of organic production: Rudolf Steiner from Austria, Hans Müller from Switzerland, Lady Eve Balfour from Britain, J.I. Rodale in the United States, Albert Howard from Britain, and Masanobu Fukuoka from Japan. Among them, Rudolf Steiner's (1861–1925) influence is particularly notable and significant across various fields, especially in education. Steiner initiated the development of the earliest and, for a time, the most influential forms of organic agriculture, known at the time as biodynamic farming. The biodynamic movement, symbolized by Demeter (the Greek goddess of agriculture), arose from a series of lectures delivered by Steiner in 1924, just one year before his death (Tomas-Simin & Glavas-Trbic, 2016).

The foundational schemes and symbols of organic agriculture were established during the second

period, between 1970 and 1990. Along with the growth in demand for organic products, "green" awareness also increased, with the sale of organic products experiencing consistent growth. The last quarter of the twentieth century was marked by a surplus in agricultural production, particularly in Western countries, and a delayed concern for planetary well-being, which led to greater recognition of organic production. The positive relationship between supply and demand in the organic product market enabled the expansion of land under certified organic production.

In 1970, William Albrecht introduced the definition of ecological agriculture, linking ecological production principles with organic agriculture. From the 1980s onward, organic farming gained wider acceptance, national and international standards were developed, and many governments began supporting farmers engaged in organic production systems. Simić and Janković (2014) note that the initial motives for transitioning to this production system (initially centered around a connection with nature, a holistic approach to life, etc.) were later replaced by economic motives. Confirmation of the newly achieved recognition of organic production came in the 1980s, when Sweden, Denmark, and the German government introduced incentives to encourage farmers to adopt this production system. Legal definitions of organic farming soon followed in the United States and the European Union.

During this period, the most important scientific and research institutions focused on organic farming were established:

- The Research Institute of Organic Agriculture (FiBL) – Switzerland (1973)
- International Federation of Organic Agriculture Movements (IFOAM) (1972)
- Louis Bolk Institute – Norway (1976)
- Ludwig Boltzmann Institute for Organic Agriculture and Applied Ecology – Austria (1980)
- Elm Farm Research Centre – United Kingdom (1980)
- Chair of Organic Agriculture – Germany (1981)

After the expansion period (post-1990), during which organic agriculture's infrastructure was developed, the full development phase began. During this time, the total area under organic farming continued to grow, leading to an increase in the market value of organic products. Regarding infrastructure development, greater attention was paid to the monitoring and analysis of organic production on an international level. In 1982, IFOAM published the first Basic Standards for Organic Production and Processing, which soon became an internationally recognized and accepted foundation for certifying organic food (Tomas-Simin & Glavas-Trbic, 2016).

2.2. Overview of EU Legislation on Organic Agriculture

For a long time, the European organic sector was characterized by a system of voluntary private standards and third-party inspections for farms that wished to use organic labels. This changed when governments in some European countries introduced national legislation for organic agriculture. France was the first country to adopt such a legal framework in 1980, followed by Austria in 1983 and Denmark in 1987. The goals of these state regulations were to protect consumers from false claims and to create fair conditions for organic producers.

In response to growing consumer demand for certified organic products and to protect organic agriculture while ensuring fair competition among producers and transparency across all stages of production and processing within the EU, the European Council introduced a definition of organic agriculture at the EU level with **Regulation (EEC) 2092/91** in 1991. This regulation set rules for organic crop production compared to conventional agricultural products and food. Frequently used terms such as

"organic," "biological," and "ecological" were protected in various European countries. Rules for organic livestock and food products were introduced eight years later with **Regulation (EC) 1804/1999**, supplementing the existing organic regulations. These legislative measures are considered some of the most important driving forces for the organic sector in the EU. The regulatory framework facilitated trade in organic products within and outside the EU and provided opportunities to specifically address organic farming within European agri-environmental measures (**Regulation (EEC) 2078/92**).

Despite the EU-level rules for organic farming, internal trade in organic products was still hindered, mainly due to differing national and private standards and their implementation (European Commission, 2004). To minimize this issue, the European Commission recognized the need to develop common objectives, a multilateral concept of equivalence, and further harmonization of inspection requirements, as well as to place greater emphasis on the EU organic logo on products. In the **European Action Plan for Organic Food and Farming (EOAP)** of 2004, the European Commission proposed improving and strengthening standards for organic farming, as well as requirements for imports and inspections, outlining numerous actions regarding standards and inspections. As a result, **Regulation (EEC) 2092/91** was revised, leading to the adoption of the new **Council Regulation (EC) 834/2007** in 2007 and Regulations **(EC) 889/2008** (on production and labeling) and **(EC) 1235/2008** (on imports) in 2008. This new organic farming legislation, which came into effect on January 1, 2009, defined the basic goals and principles of organic farming, set standards for organic production, and specified control and labeling requirements.

Since then, the legislative framework has been updated, e.g., with rules for aquaculture in 2009 (**Regulation (EC) 710/2009**) and wine production in 2012 (**Regulation (EC) 203/2012**), amending **Regulation (EC) 889/2008**.

The European Commission supplemented the legal framework of the organic sector with three successive action plans published in 2004, 2014, and 2021. These action plans aim to define the EU's strategy for organic agriculture. In May 2020, the Commission announced the **Farm to Fork Strategy**[21] and the **EU Biodiversity Strategy for 2030**[22], implementing the European Green Deal. Both strategies set a strategic goal for 25% of the EU's agricultural land to be organically cultivated by 2030 (Figure 1).

Financial support for developing organic farming is primarily provided through the **Common Agricultural Policy (CAP)**. Between 2014 and 2022, farmers received nearly €12 billion from the EU through the **European Agricultural Fund for Rural Development (EAFRD)** to transition to organic farming or maintain organic practices. Additionally:

- From 2014–2022, the European Agricultural Fund provided approximately €60.6 million to support organic production in the fruit and vegetable sector through producer organizations.
- Between 2014 and 2020, around €45 million in EU financial support was allocated for research and innovation in organic farming through the **Horizon 2020** program.
- Between 2021 and 2027, 30% of Horizon Europe's funds for agriculture, forestry, and rural development are earmarked for topics directly or indirectly related to the organic sector.
- From 2016 to 2023, around €140 million was allocated for promoting organic products through the EU's agri-food promotion policy.
- For 2023–2027, Member States plan to allocate approximately €14.7 billion to support organic farming in their **CAP strategic plans** (Special report 19/2024: Organic farming in the EU | European Court of Auditors).

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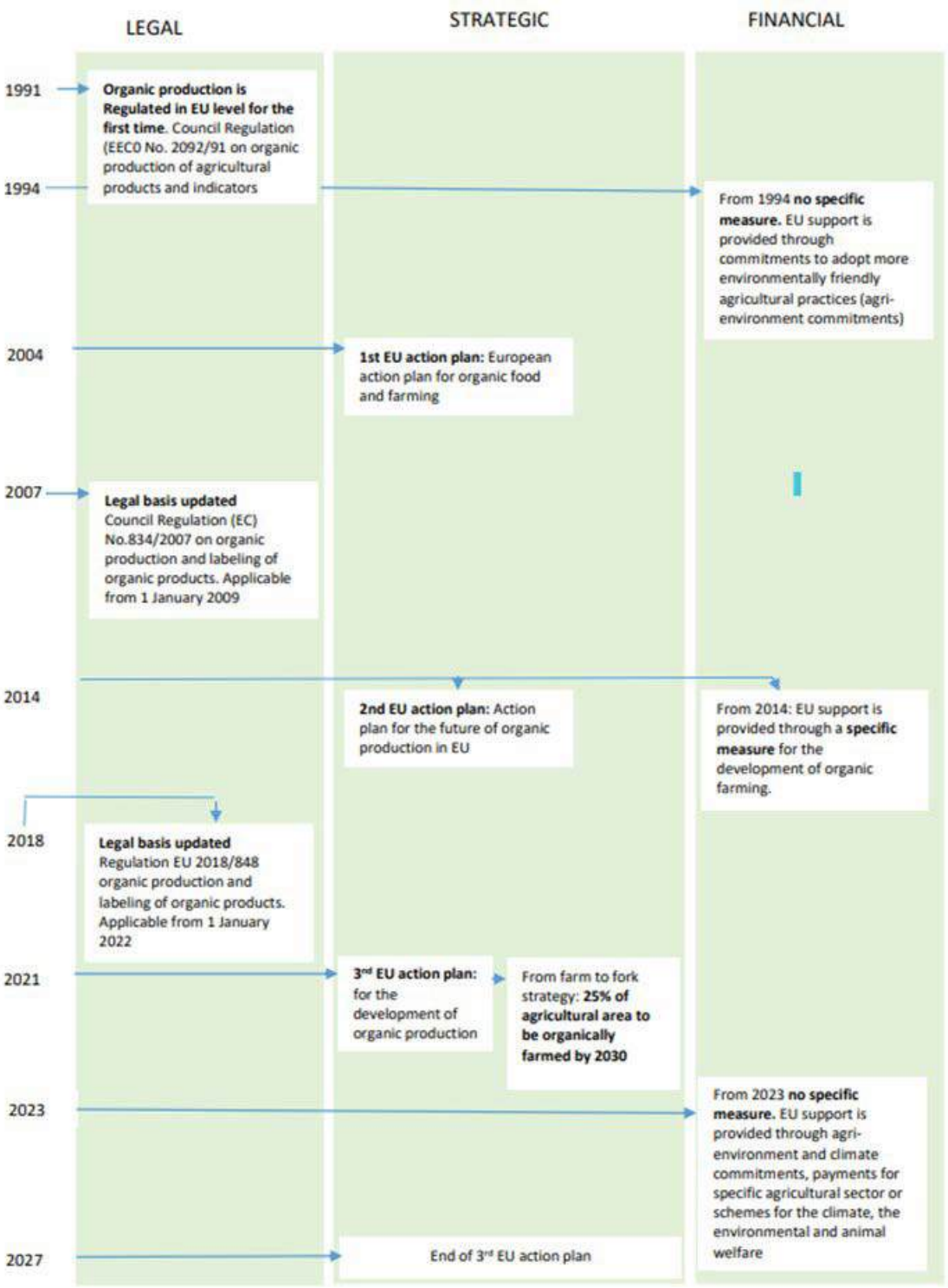


Figure 1. Overview of EU Legislation on Organic Agriculture
(from: Special report 19/2024: Organic farming in the EU | European Court of Auditors)

3. OBJECTIVES AND PRICIPLES OF ORGANIC AGRICULTURE

According to the guidelines for organic food in the **Codex Alimentarius** by the Food and Agriculture Organization (FAO) and the World Health Organization (WHO), organic agriculture is defined as "a holistic production management system that promotes and enhances the health of agro-ecosystems, including biodiversity, biological cycles, and soil biological activity. It prioritizes management practices over the use of off-farm inputs, recognizing that regional conditions require locally adapted systems. This is achieved, where possible, through agronomic, biological, and mechanical methods rather than synthetic materials to fulfill any specific function within the system."

The normative foundation of organic agriculture is established through a set of objectives and principles. According to the **Council Regulation (EC) 834/2007** (Articles 3–7), organic production should adhere to the following three objectives:

- Establishing a sustainable agricultural management system.
- Producing high-quality products.
- Producing a wide range of food and other agricultural products that meet consumer demand, using processes that do not harm the environment, human health, plant health, or animal health and welfare.

In addition, organic agriculture should be based on the following four fundamental principles:

- Appropriate design and management of biological processes based on ecological systems that utilize natural resources.
- Limited use of external inputs.
- Strict restriction of the use of chemically synthesized substances.
- Adaptation, where necessary, of organic production rules, taking into account sanitary conditions, regional climate differences, local conditions, development stages, and specific agricultural practices.

The European Union regulations for organic agriculture are designed to provide a clear framework for the production of organic products across the EU. The goal is to meet consumer demand for reliable organic products while ensuring a fair market for producers, distributors, and retailers.

4. FACTS AND FIGURES

4.1. Organic Agricultural Production Worldwide

In 2022, globally, 96.4 million hectares were under organic agricultural production, representing 2.0 percent of the total agricultural land. Compared to 2021, the area under organic agriculture increased by 26.6 percent, or by 20.3 million hectares (Figure 2) (FiBL & IFOAM, 2024).

Figure 2. Land under organic production worldwide (M = Million ha)
Source: FiBL & IFOAM, 2024

· The region with the largest organic agricultural area is Oceania, with 53.2 million hectares, followed by Europe with 18.5 million hectares, Latin America (9.5 million hectares), Asia (8.8 million hectares), North America (3.6 million hectares), and Africa (2.7 million hectares).

· Oceania accounts for more than half (55 percent) of the world's organic agricultural land. Europe, a region with consistent growth in organic areas over the years, represents more than 19 percent, followed by Latin America with nearly 10 percent.

· Australia, with 53 million hectares, has the most agricultural land under organic farming, followed by India with 4.7 million hectares and Argentina with 4.1 million hectares.

· In addition to organic agricultural areas, there are other organic regions primarily used for the collection of wild plants. These areas cover approximately 35 million hectares.

· The organic food and beverage market reached nearly ¬135 billion in 2022, with leading countries being the United States (¬58.6 billion), Germany (¬15.3 billion), and China (¬12.4 billion) (FiBL & IFOAM, 2024).

4.2. Organic Agriculture in Europe and the EU

The demand for organic agricultural products in Europe, particularly within the EU, has been steadily increasing in recent years, with the organic food market almost doubling between 2015 and 2020. According the report by the Directorate-General for Agriculture and Rural Development (2021), 9.9% of the total arable land in the EU was under certified organic production (Figure 3). Four countries: France, Spain, Italy, and Germany, account for 59% of the total organic areas. However, in relative terms at the national level, member states such as Liechtenstein lead with organic agriculture covering 43% of the country's total arable land. Austria, Estonia, and Sweden follow with more than 20%.

As part of the European Green Deal, the EU's "Farm to Fork" food policy aims to have 25% of agricultural land under organic farming by 2030.

The EU's organic product market is valued at €44.9 billion annually, representing 37% of the global organic food market, placing the EU second after the US, which accounts for 41%.

Recent EU development policies focus on integrating organic agriculture with other sectors, particularly rural areas, to encourage synergies between organic farming, culture, tourism, hospitality, and other local activities. The goal is to "maximize the economic, socio-cultural, and economic potential of these regions" (Bozic et al., 2024).

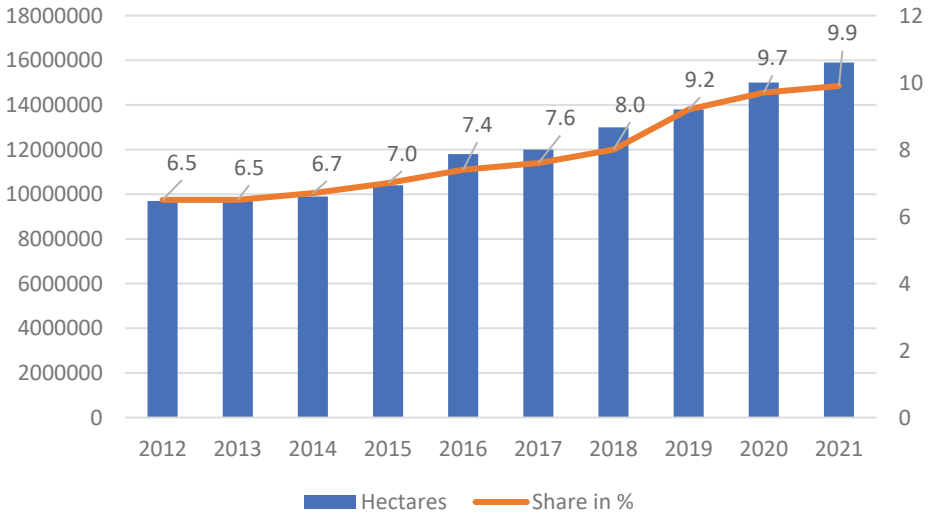


Figure 3. Share of organic agricultural land in the total arable land in the EU, 2012–2021 (source: Action Plan for the Development of Organic Production, 2023)

4.3. Future Growth of the Organic Products Market in the EU: Perspectives and Challenges

The future growth of the organic products market in the EU will depend on increasing the area of organic farming, structuring the sector, developing the processing industry, expanding the presence of organic products across all market channels, and, naturally, consumer demand. Trends in growth or decline in these areas are closely tied to public policies implemented in the coming years, both at the EU level and within individual member states. Promoting organic products will remain essential for improving consumer awareness. The market is expected to continue growing within channels domi-

nated by large retail chains across many EU countries. A trend is anticipated where major retail chains increasingly absorb specialized stores, including online shops. The trend of considering environmental protection in purchasing decisions is also expected to maintain positive growth. According to Mintel agency, younger generations place great importance on the social and environmental impact of their consumption, which should support the future growth of the organic sector. Online sales of organic products are likely to expand in most EU countries. In the coming years, growth is anticipated in this market channel, as well as in direct sales segments (e.g., subscription-based organic box deliveries) across Europe. Increased interest from younger generations in organic products makes this very likely. Sales growth in specialized organic stores will depend on their capacity and the introduction of new brands and innovations within this retail channel. Expanding the availability of organic products is expected to continue, encouraging more consumers to incorporate organic food into their diets. This should enhance sales across various market channels, with growth rates differing among EU countries.

According to FiBL and ECOZEPT, the organic market heavily depends on the diversity of distribution channels. Bionext estimates that if the current growth trend continues, the European organic market (both within and outside the EU) will surpass €100 billion by 2025 (Simic, 2020).

5. STATUS IN THE REPUBLIC OF NORTH MACEDONIA

5.1. The Most Important Facts for Agriculture in Republic of North Macedonia

Agriculture is one of the key sectors in North Macedonia, contributing 8.1% to the gross value added in primary production or approximately 12% when combined with the processing industry (including beverages and tobacco). This places agriculture third after industry and services (NSARD 2021 – 2027). Most agricultural holdings are family-owned and very small, with highly fragmented land. Agricultural land accounts for half of the country's total area, covering 1.26 million hectares, while 44% of the territory is forested. About 60% of agricultural land comprises pastures, with the remaining 514,375 hectares classified as arable land, forming the basis for agricultural production.

Crop production dominates, accounting for an average of 76% of the total agricultural output value (State Statistical Office, 2022). The country has a long-standing tradition of producing a variety of agro-food products, with established domestic and international export connections. The most important export-oriented agro-food products in 2021 included tobacco (20% of total agro-food exports), biscuits and wafers (10%), processed vegetables (9.5%), wine (7.8%), cabbage (3.2%), apples (3.5%), peppers (2.8%), lamb (2.5%), meat products (2.4%), chocolates (2.3%), sunflower oil (2.1%), as well as grapes and tomatoes (2% each) (State Statistical Office, 2022).

The country's strategic geographic location at the crossroads of the Balkan Peninsula is a major asset, with proximity to regional and EU markets. Trade regime is favorable (free trade agreement with EU, CEFTA, Open Balkans, and bilateral free trade agreements). Alignment with the EU legislative is under way, and there is good progress especially in the area of food safety and quality (Association of Agro economists of North Macedonia, 2022).

5.2. Importance and Role of Organic Production in Republic of North Macedonia

Although the first activities in the organic sector date back to 1997, organic production in North Macedonia is still in its pioneer phase. Organic production accounts 1.2% of the total agricultural land under conventional farming in the country. As a production system, organic farming has great potential due to the extensive traditional agriculture, predominantly found in mountainous areas with very favorable ecological conditions for its sustainable development (over 50% of the country's total agricultural land). Products from these regions already enjoy a good reputation among Macedonian consumers, who often refer to them as "eco-friendly" products.

Organic farming meets societal expectations in terms of environmental protection, the production of high-quality and safe food with high nutritional value, sustainable management of non-renewable natural resources, and proper care for animal welfare. Additionally, it significantly contributes to the general welfare of the population, particularly in terms of preserving biodiversity and protecting drinking water sources, creating new jobs due to increased labor demand, increasing the value of labor per unit of product, preserving natural landscapes, and protecting the environment.

Despite these optimistic indicators, organic farming and organic food production in North Macedonia still face many challenges. Areas that require attention include improving quality in agricultural production, establishing sustainable supplier-buyer relationships, supporting local sales of organic products, enhancing professionalism, and transferring scientific knowledge into practice. Agricultural producers and organic food processors need to become respected leaders by implementing advanced technologies and ecological standards.

5.3. Development of Organic Agriculture/Sector in the Republic of North Macedonia

In Republic of North Macedonia, the initial steps toward organic production date back to the late 1990s, involving individual producers supported by various foreign donors. During this time, the term "ecological production" was commonly used, as the Organic Agricultural Production Law had not yet been enacted.

In 1997, the country's largest pharmaceutical company entered the domestic market with several types of organic teas made from wild-harvested herbs. By 1998, a small group of farmers from Ohrid, Kumanovo, and Strumica began the first organic farming activities, producing according to organic principles for pre-determined buyers.

In 1999, the initial expertise was secured to draft a legal framework for organic production. By the end of 2000, the first draft of the Organic Production Law was completed in consultation with European organic production experts. In 2001, the Government of North Macedonia adopted the draft Organic Production Law and forwarded it for parliamentary review. The same year, the first associations of organic agricultural producers were established, and the "Local Initiatives Towards Organic Agriculture" project was launched as part of the Environmental NGOs Support Program.

In 2002, an introductory workshop was organized to highlight the importance of organic agricultural associations and their unification into a national alliance. That same year, regional cooperation in organic agriculture was promoted through several workshops under the title "Promotion of Organic Agriculture in the Balkans" for the period 2002 – 2005.

In 2003, following the successful completion of the "Local Initiatives Towards Organic Agriculture" ecological project, a decision was made to launch a new project entirely dedicated to the development of organic agriculture. The same year, cross-border cooperation in organic agriculture began with Bulgaria, Croatia, Greece, and Switzerland, focusing on education and training, study visits, and the publication of brochures and similar materials. In 2003, the first 13 organic farms were inspected.

More significant steps towards establishing the organic movement in the country began with the implementation of the Local Initiatives Support Project in Macedonia for the Development of Organic Agriculture, supported by the Swiss Agency for Development and Cooperation (SDC). During the 2003 – 2004, the initial project was restructured into the Organic Agriculture Project in Macedonia, also supported by SDC and led by the Research Institute of Organic Agriculture (FiBL) in Switzerland. Within the project framework, a specialized advisory service was established, guided by FiBL and other institutions on organic production techniques. At the time, since there was no accredited control and certification body in North Macedonia, the first Macedonian organic producers were certified by IMO (Institut für Marktökologie) in Switzerland. Parallel to these developments, the Organic Agricultural Production Law was enacted in April 2004. Based on the newly adopted law, 12 by-laws needed to be approved, marking the beginning of a national legislative framework for organic agricultural production.

In December 2004, the first by-law was adopted, establishing the Advisory Coordinative Commission for Organic Agriculture.

In March 2005, the second by-law, the Program for Promoting the Development of Organic Agriculture, was approved. By June 2006, three additional by-laws were enacted, regulating standards for organic production (crop production, livestock production, and processing). The same year, the National Union of Associations of Organic Product Producers, "Biosan," was registered.

In 2007, the National Strategy and Action Plan for Organic Agriculture in North Macedonia were adopted, and all by-laws required under the Organic Agricultural Production Law were completed, finalizing the national legal framework. That year, the control and certification body "Balkan Biosert" was authorized by the Ministry of Agriculture, Forestry, and Water Economy to conduct professional inspections of organic agricultural production in the country.

In 2008, the Federation of Organic Product Producers of Macedonia (FPOPM) was established as a national organization uniting and coordinating regional associations of organic producers.

In 2009, the first Macedonian control and certification body, Pro-Cert, was accredited, and the second Organic Agricultural Production Law was adopted, coming into force in 2010. The Organic Agricultural Production Law regulates the production, preparation, processing, refinement, storage, transportation, distribution, advertising, sale, labeling, and control of organic products produced using organic methods. According to the Law, by the end of 2010, multiple regulations were adopted to govern the production, control, certification bodies and their authorization, packaging, transportation, and storage of organic products, as well as the content and design of the national logo for organic products. To further align with Regulations (EC) 834/2007 and (EC) 889/2008, and to integrate the rules and procedures outlined in Regulation (EC) 1235/2008 concerning the import of organic products from third countries into the national legal framework, as well as Regulation (EC) 710/2009 establishing detailed rules for organic aquaculture production, three new regulations were adopted in 2011. These included:

1. Regulation on the Rules for Rearing Aquatic Animals,
2. Regulation on the Form, Content, and Template of the Certificate Confirming that the Product, Production Process, Preparation, or Marketing Complies with the Rules and Procedures of the Law, including the records maintained by entities, and
3. Regulation on the Form, Content, and Template of the Certificate for Conformity of Organic Production with the Importing Country, the Issuance Procedure, and Required Documentation for Import of Compliant Products.

The Law on Organic Products was amended in 2011 to include changes to the penal provisions. Organic products must carry an appropriate label as required by national regulations. The label serves as confirmation that the product is certified according to established standards. Only producers who follow the rules and procedures for organic agricultural production, as outlined in the Macedonian Law on Organic Agricultural Production and related regulations, may use the term "organic" in product labeling and advertising.

Under Macedonian law, the term "organic" denotes:

- a method of production, not a specific level of quality of the product obtained;
- the use of certified organic products approved by the control/certification body responsible for professional oversight;
- the type of production, transition period, and organic product status.

For consumers, this is a reliable indicator that the product they purchase is certified according to specific standards and that the certificate is issued by an authorized certification body. This informs consumers about the organic origin and quality of the product (Daniloska and Naumova-Mihajlovska, 2017).

In 2016 was published a catalogue for Macedonian Organic Agriculture Export Drivers and in 2018, a new Register of Organic Producers was introduced, providing information on all certified organic producers, traders, suppliers, and processors of organic products.

A new Law on Organic Production is being prepared to align with updated EU legislation.

Figure 4. National organic product label
Source: Official Gazette of RM No. 162/2010

6. KEY LAWS AND BY-LAWS WHO REGULATE ORGANIC AGRICULTURE IN THE REPUBLIC OF NORTH MACEDONIA

The following national legal regulations in the Republic of North Macedonia provide the foundation for organic production:

Laws		
Law on Organic Agricultural Production	Official Gazette of RM No. 16/2004, 146/2009, 53/11, 149/2015, 39/2016, 132/2016	
Law on Seed and Plant Material for Agricultural Plants	Official Gazette of RM No. 39/2006, 89/2008, 171/2010, 53/2011, 69/2013, 187/2013, 43/2014, 129/2015, 39/2016, 71/2016	
Law on Quality and Safety of Fertilizers, Bio stimulants, and Soil Conditioners	Official Gazette of RM No. 27/2014, 154/2015, 39/2016	
Law on Agriculture and Rural Development	Official Gazette of RM No. 49/2010, 53/2011, 126/2012, 15/2013, 69/2013, 106/2013, 177/2014, 25/2015, 73/2015, 83/2015, 154/2015, 11/2016, 53/2016, 120/2016, 163/2016, 74/2017, 83/2018, 27/2019, 152/2019, 244/2019, 275/2019	
Law on Nature Protection	Official Gazette of the Republic of Macedonia No. 67/2004, 14/2006, 84/2007, 35/2010, 47/2011, 148/2011, 59/2012, and 13/2013	
Law on Environment	Official Gazette of the Republic of Macedonia No. 53/2005, 81/05, 24/07, 159/08, 83/09, 48/10, 124/10, 51/11, 123/12, 93/13, 44/15	
New Law for Organic Agricultural Production	In final phase	
By Laws		
Rulebooks	**Lists**	
Rulebook on procedures for the collection, packaging, transport, and storage of organic products, the form and content of the certificate for untreated regions with substances not permitted for use in organic production, and the method of issuing the certificate.	List of ingredients that were not produced according to the principles of organic production.	Official Gazette of RM No. 163/10
Rulebook on procedures for animal husbandry in organic production, minimum space requirements for housing different types of animals, and the maximum number of animals per hectare	List of cleaning and disinfecting agents.	Official Gazette of RM No. 163/10

Rulebook on the form, content, method, and procedure for maintaining records of veterinary interventions in the organic livestock unit.	List of reproductive plant material from species that are in regular production and can be used in organic plant production.	Official Gazette of RM No. 163/10
Rulebook on detailed rules and procedures in beekeeping.	List of feed ingredients.	Official Gazette of RM No. 163/10
Rulebook on the form, content, and method of maintaining records for organic seed and planting material.	List of additives in animal feed and other substances used in animal nutrition.	Official Gazette of RM No. 163/10
Rulebook on the form, content, and color of national organic labels.	List of products and substances used in the process of producing organic processed food.	Official Gazette of RM No. 163/10
Rulebook on the method and procedure for conducting professional control in organic agricultural production	List of plant protection products used in organic agricultural production.	Official Gazette of RM No. 163/10
Rulebook on the form and content of the annual report of certification bodies.	List of bio stimulants, fertilizers, and soil conditioners used in organic agricultural production.	Official Gazette of RM No. 163/10
Rulebook on the method of issuing authorizations for conducting professional control in organic agricultural production, authorization of professional scientific institutions and other legal entities for conducting analyses and super-analyses in organic agricultural production, required documentation, form, content, and method of maintaining records of authorized entities.		Official Gazette of RM No. 163/10

The adoption of the new Law on Organic Agricultural Production (which is in the final stage) foresees alignment with European regulations, specifically the integration of the rules and procedures provided in Regulation 848/2018[23], as well as with Regulations 2146/2020[24], 910/2014[25], 771/2021[26], and 715/2021[27].

23 Regulation (EU) 2018/ of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007
24 eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020R2146
25 <P
26 Publications Office
27 Publications Office

7. MAJOR STRATEGIC DOCUMENTS WITH GOALS FOR THE DEVELOPMENT OF ORGANIC AGRICULTURE IN THE REPUBLIC OF NORTH MACEDONIA

To date, four major strategic documents addressing organic agriculture have been adopted in the Republic of North Macedonia. These include two national strategies exclusively focused on organic agriculture: **The National Strategy with an Action Plan for Organic Agriculture of the Republic of Macedonia (2008–2011)** and **The National Plan for Organic Production (2013 – 2020),** as well as two **National Strategies for Agriculture and Rural Development (2014 – 2020 and 2021 – 2027)**, which assign significant importance to organic production.

The strategic and implemented goals from the National Strategy for Organic Agriculture (2008 –2011) are outlined below (Table 2):

Table 2: Strategic and Implemented Goals for Organic Agriculture, 2008 – 2011

Target Set	Target Achieved
By 2011, organic arable land to account for 2% of the total arable agricultural land in the Republic of Macedonia	In 2011, organic arable land accounted for 1.29% of the total arable agricultural land in the Republic of Macedonia, amounting to 6,580.92 hectares. The total arable agricultural land in the Republic of Macedonia in 2011 was 511,000 hectares.
Certified areas for wild plant and fruit collection to account for 5% of the total land area in the Republic of Macedonia	Certified areas for wild species collection have increased to approximately 250,000 hectares. Since wild plant and fruit collection occurs on pastures, meadows, and forests, a significant portion of these areas is not registered in cadastral records, making precise measurement impossible. Additionally, there is no nationwide database or record for wild plant and fruit collection from regular production, meaning the total certified areas for such collection cannot be accurately calculated.
By 2011, the majority of consumers in the Republic of Macedonia should understand what organic agriculture is and create domestic demand for organic products	A growing number of consumers in Macedonia understand what organic agriculture represents and recognize the value of organic food. However, much work remains in this area. To establish a strong domestic supply and demand for organic products, continuous consumer education and awareness-raising through targeted campaigns, promotions, and other informational tools are essential.
By 2011, establish stable export connections	Certain entities, primarily companies, have independently established export connections with EU countries, but organized export of organic products has not yet been achieved.

The national strategic goal outlined in the **National Organic Production Plan (2013 – 2020)** was to enhance the competitiveness of organic production in the country for successful placement in domestic and international markets. Specific objectives for 2020 related to primary agricultural production included:

- Achieve 4% organic production share of the total arable agricultural land in Macedonia and ensure 4% of the total certified livestock in organic farming (including beekeeping and aquaculture) from the total livestock population**.**
- Identify and support strategically significant organic products.
- Improve the availability of inputs permitted for use in organic production.

Additionally, specific goals and methods of realization were detailed for the processing industry, trade, control and certification, education and science, policy and legislation, and the collection of wild species.

7.1. Key Findings and Recommendations in Agricultural Strategies

The **National Strategy for Agriculture and Rural Development (2014 – 2020)** emphasized that organic production should align with real domestic market interest. The policy's desired projection was:

- 2% cultivated land under organic production of the total arable agricultural land.
- 2% certified organic livestock (including beekeeping and aquaculture) of the total livestock population.

A more ambitious approach was deemed possible only with serious reorganization among organic producers, focusing on increasing their presence in foreign markets with higher demand for organic products.

In the **National Strategy for Agriculture and Rural Development (2021 – 2027)**, the state of organic agriculture was acknowledged: despite growth in previous years, organic production remains under **2%** of total agricultural land and livestock. **This remains the target for the next period**. To address this, organic production must focus on leveraging its added market value rather than relying solely on income support. Recommendations include:

- Finalizing organic products.
- Improving organic product marketing domestically and internationally.
- Raising public awareness of organic food.

Further suggestions included stimulating trade in seeds, fertilizers, and plant protection products, increasing subsidies for organic product processing, enhancing monitoring and laboratory testing systems, and more.

7.2. Relevant Policy Documents

Additional key policy documents addressing organic agriculture include:

- Stabilization and Association Agreement (2001): Covers social justice, employment, and sustainable resource use in North Macedonia.
- Strategy for Harmonizing the Macedonian Agro- Food Sector with the EU's Common Agricultural Policy**:** Highlights the need to identify regions suitable for organic production and align with EU regulations.

- World Trade Organization Agreement (2003)**:** Aims to improve international food safety and security standards as adopted by Codex Alimentarius (Национална стратегија со акционен план за органско земјоделство на Р. Македонија (2008 – 2011).

8. DATA SOURCES FOR ORGANIC PRODUCTION IN THE REPUBLIC OF NORTH MACEDONIA

Statistical data on organic production in RN Macedonia can be obtained from two primary sources:

1. **Website of the Ministry of Agriculture, Forestry, and Water Economy (MAFWE)[28]:** A dedicated section provides information on organic production, including legislation, an overview of organic production areas and livestock, a registry of organic producers, relevant literature, contacts, and more.
2. **MakStat Online Database of the State Statistical Office (SSO)[29]:** This database displays statistical data on areas under organic crops, organic livestock production, and beekeeping families.

For sector-specific analysis: organic crop and livestock production, data from the State Statistical Office were used. For comparison purposes, data from MAFWE are provided as an appendix.

9. ORGANIC AGRICULTURAL PRODUCTION IN THE REPUBLIC OF NORTH MACEDONIA

9.1. Organic Crop Production, Period 2013 – 2023

The areas under certified organic production and the number of certified organic operators in North Macedonia are presented in Charts 2 and 4. According to the latest data, in 2023, there were 6,001 hectares of certified organic production, representing 1.17% of the total arable land in 2023 (514,375 hectares). This figure still falls short of one of the specific goals outlined in the **National Strategy of Agriculture and Rural Development (2021–2027)**, which aims for the share of total organic area in total arable land to reach 2% (Chart 3).

The number of certified organic operators has been gradually increasing, with the highest total recorded in 2021 at 929 operators. However, the number has decreased over the past two years, standing at 913 operators in 2023, with an average area per operator of 5.3 and 6.6 hectares, respectively (MAFWE, 2023).

28 Министерство за земјоделство, шумарство и водостопанство
29 Вкупни органски површини со органски земјоделски култури, по години. PxWeb

Chart 2. RN Macedonia: The area under organic production/ha, 2013 - 2023

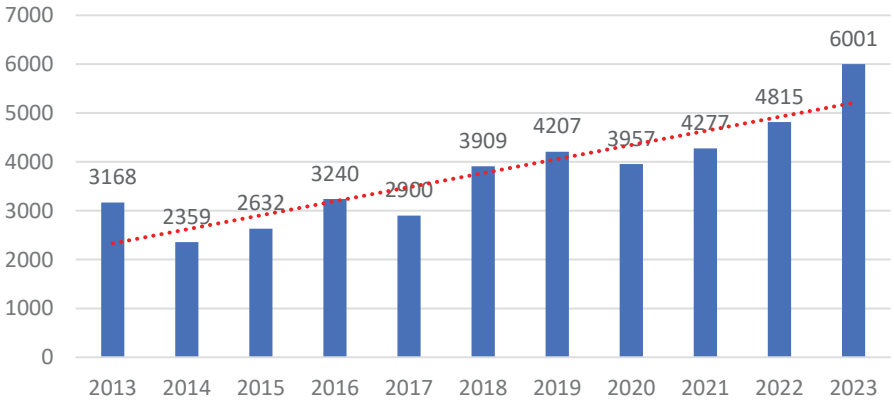


Chart 3. Number of cerified organic operators and average area/operator/ha, 2013 - 2023

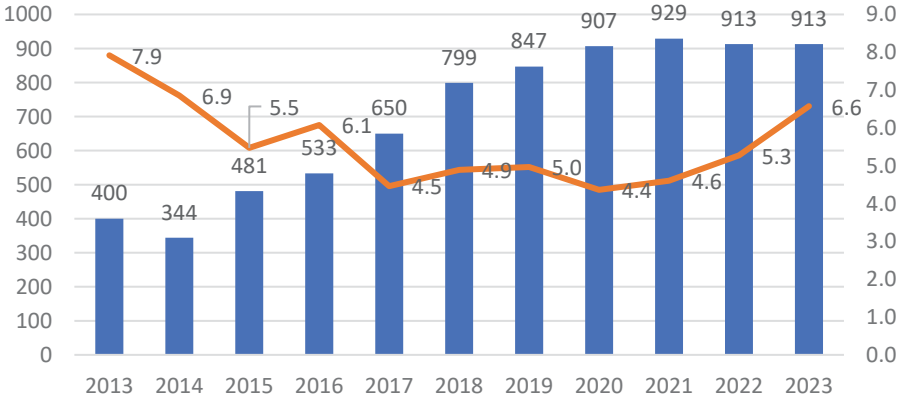
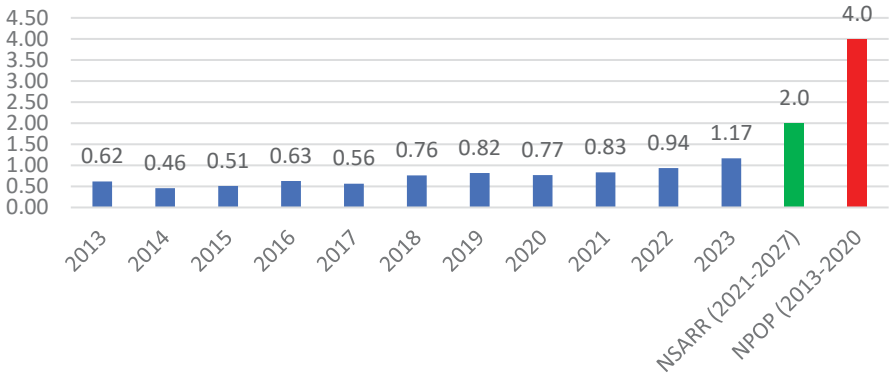


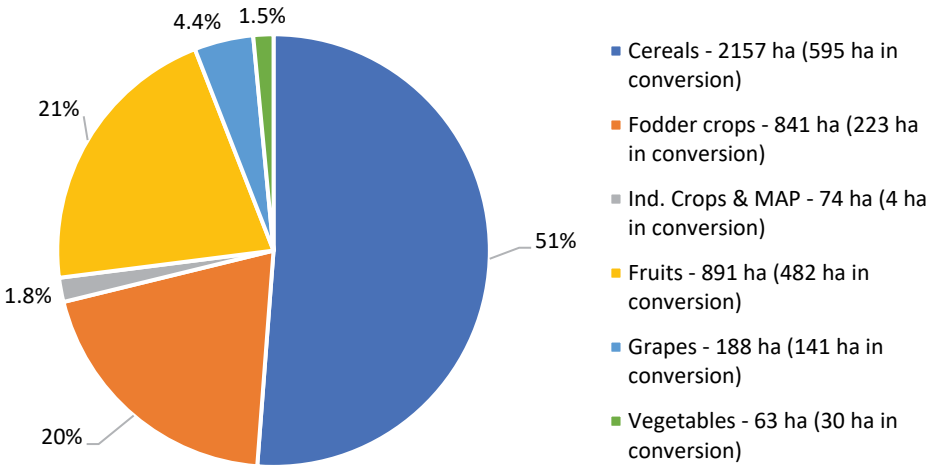
Chart 4. The area under organic cultivation in total arabel land in %, 2011- 2023



9.2. Organic Crop Production, 2013 – 2023

Cereals occupy the largest share of the total certified organic area, followed by fruit and fodder crops (Chart 5) (MAFWE, 2023; SSO, 2023).

Chart 5. Area of organic crop production, 2023



According to the latest data, in 2023 there were 2,157 hectares of certified organic cereal crops, of which 595 hectares were in transition. This marks a decrease of 329 hectares compared to 2022 (Chart 6). The main organic cereal crop is barley, with an annual production of 1,906 tons, accounting for 52% of the total organic cereal production (3,653 tons) (Chart 7) (SSO, 2023).

Chart 6. Cultivated area under organic cereals/ha, период 2013 - 2023

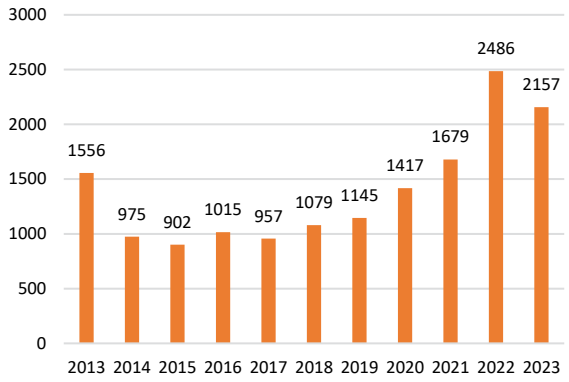
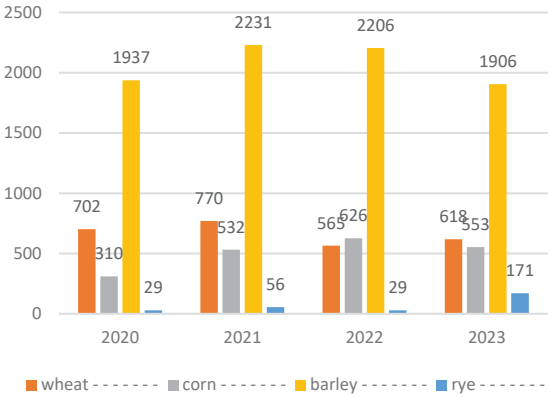


Chart 7. Organic production of cereals/t



The largest areas under organic forage crops were recorded in 2018- 1,134 hectares. In 2023, this area decreased by 35% to 841 hectares (Chart 8), representing 2% of the total forage crop area (41,647 hectares). The main organic forage crop is alfalfa, with a production of 3,828 tons, which is an 8% decrease compared to 2022 and a 32% decrease compared to 2021 (Chart 9). Alfalfa accounts for more than 95% of the total organic forage crop production (4,021 tons) (SSO, 2023).

Chart 8. Cultivated area under organic forage crops/ha

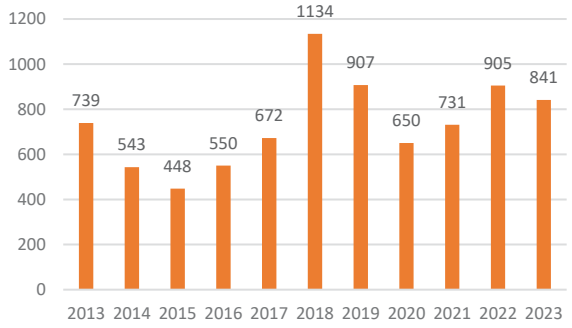
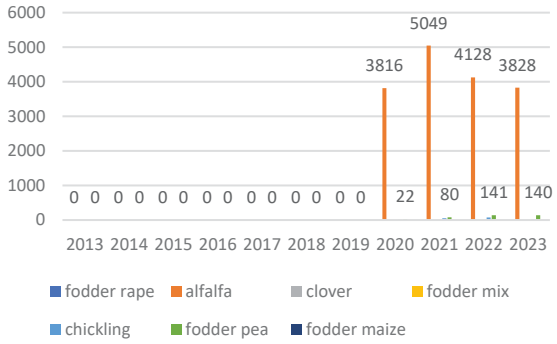


Chart 9. Organic production of forages/t



The areas under organic orchards have been continuously increasing, reaching their peak in 2023 at 891 hectares, or about 5.4% of the total orchard area in the country (16,423 hectares), with various organic fruit species represented. The largest areas are dedicated to almonds (201 hectares), followed by sour cherries (126 hectares), hazelnuts (111 hectares), and plums (95 hectares) (Chart 10). In terms of production, the highest yield was achieved with organic apples-- 422 tons, accounting for 26% of the total organic fruit production (1,602 tons), followed by plums with 252 tons (15.7%), sour cherries with 150 tons (9.4%), and peaches with 142 tons (8.8%) (Chart 11) (SSO, 2023).

Chart 10. Cultivated area under organic orchards/ha

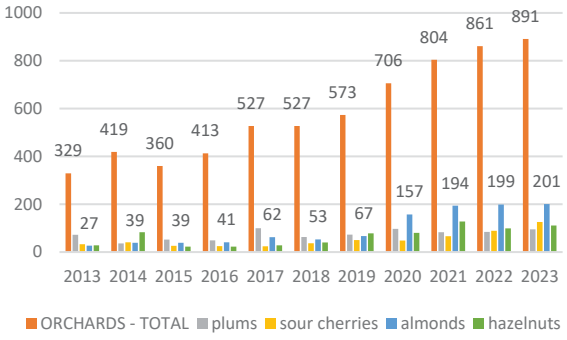
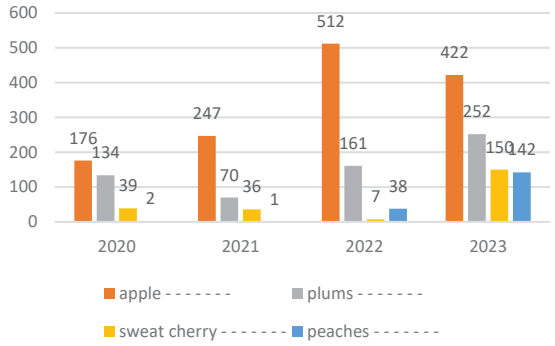


Chart 11. Organic production of leading fruit crops/t



The area under organic vineyards shows an increasing trend, reaching 188 hectares in 2023 (Chart 12), or 0.8% of the total vineyard area (22,353 hectares). The total annual production of organic grapes in 2023 was 492 tons, which is 45% less than the record 712 tons produced in 2020. Most of this production is used for making organic wine (Chart 13) (SSO, 2023).

Chart 12. Cultivated area under organic vineyards / ha

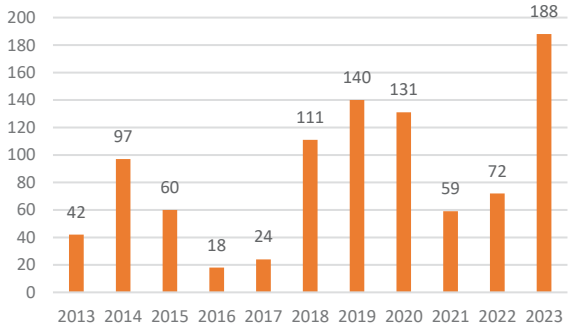
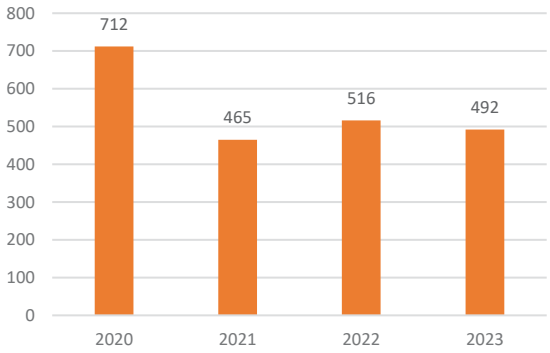


Chart 13. Organic grapes production/t



The certified area under organic industrial crops has experienced a significant decline, considering that in 2018 these crops were grown on 899 hectares. In 2023, they are cultivated on 74 hectares, of which 47 hectares, or nearly 64%, are dedicated to medicinal, aromatic, and spice plants; 26 hectares to organic sunflower; and 1 hectare to other industrial crops (Chart 14). Of the total production of 64 tons, 49 tons come from medicinal, aromatic, and spice plants, 10 tons from organic sunflower, and 5 tons from other industrial crops (Chart 15).

Chart 14. Cultivated area under organic industrial crops/ha

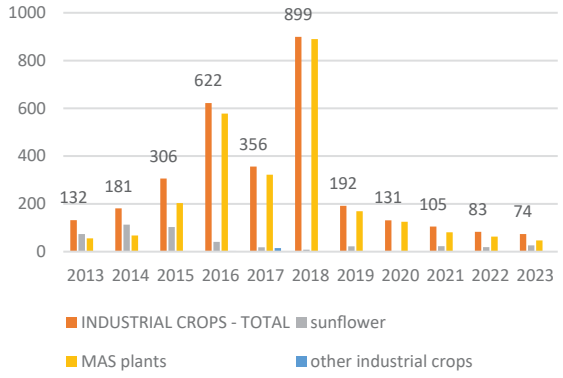
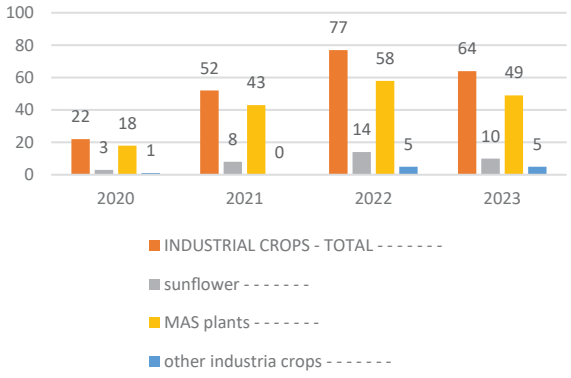


Chart 15. Organic production from industrial crops/t



From the total area of vegetable crops - 50,995 hectares, organic vegetable crops occupy only 62.9 hectares. The largest areas are dedicated to watermelon (9 hectares), cabbage (6 hectares), and peppers (6 hectares) (Chart 16). The total production amounts to 872 tons, distributed as follows: 438 tons of watermelon, 113 tons of peppers, 65 tons of cabbage, and 171 tons of other vegetable crops (Chart 17) (SSO, 2023).

Chart 16. Cultivated area under organic vegetable crops/ha

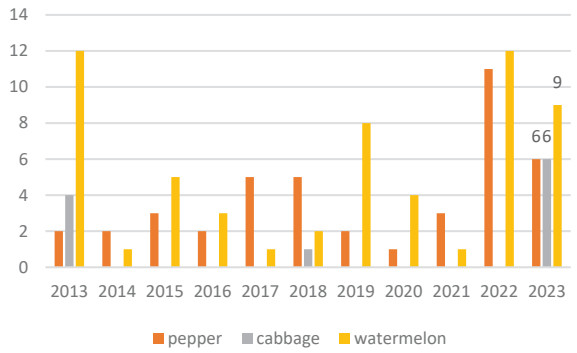
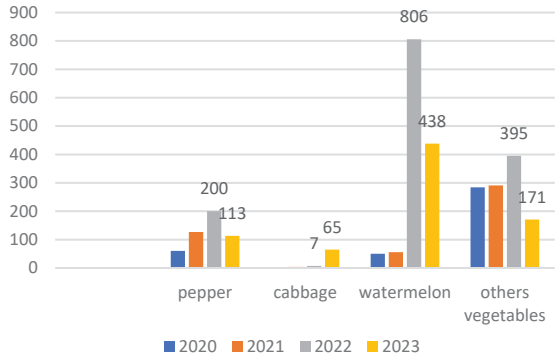


Chart 17. Production of organic vegetablle crops/t



9.3. Organic Livestock Production, 2023

In organic livestock production, sheep account the largest share of the certified livestock population, mainly because sheep farming in the country is predominantly extensive due to the large pasture areas. The number of sheep in organic production in 2023 is 120,514, of which 50,092 are fully organic and 70,422 in transition. Organic milk production totaled 2,437,000 liters. The number of cattle in organic production is 7,528, producing 48,300 liters of milk, while the number of goats 4,966, yielding 268,000 liters of milk (Tables 3 and 4). Additionally, 10,944 beehives were certified for organic honey production, with a total output of 67,886 kilograms of honey (24,470 kilograms in transition) (Table 5) (MAFWE, 2023).

Other organic livestock production is minimal. There is some potential for organic poultry production (data from the Ministry of Agriculture, Forestry, and Water Economy provided), but this sector requires further development.

Table 3. Number of organic livestock, 2013 - 2023

	cattle	sheep	goats
2013	2736	64301	2946
2014	2136	53484	2276
2015	3180	70007	4012
2016	3317	78664	4142
2017	4698	92386	3833
2018	6556	103307	5582
2019	7114	103028	4724
2020	8396	122671	5406
2021	9264	121001	5666
2022	8239	108707	5043
2023	7528	120514	4966

Table 4. Livestock organic production, 2023

	(milk production in '000 l)		
	cattle	sheep	goats
Total	48.3	2437	268
Organic	17 (35%)	907.4 (37%)	153.1 (57%)
In transition	31.3 (65%)	1529.7 (63%)	114.9 (43%)

Table 5. Beekeeping organic production, 2023

	Bee families (numberj)	Honey production (kg)
Total	10944 (100%)	67886 (100%)
Organic	6938 (63%)	43416 (64%)
In transition	4006 (37%)	24470 (36%)

9.4. Processing Companies in the Organic Industry in North Macedonia

Processing companies in the organic industry are primarily export-oriented, as the local market is limited. In 2020, certification bodies registered 26 companies for processing organic products, of which 21 were certified by Balkan Biosert and 5 by Pro Cert. Despite this, export volumes remain relatively small. Several companies are engaged in processing and trading wild-harvested products, such as dried herbs, teas, mushrooms, canned and processed fruits (mainly wild berries), as well as juices, concentrates, jams, and wine vinegar. Among the prominent companies in this sector are Alkaloid AD Skopje and Koro for organic teas, Winery Grkov for organic wine, Vitalia for organic marmalades, Inter-Mak for wild mushrooms and forest fruits, and Nelkoski Organic Food for organic hazelnut products (FAO, 2020). Additionally, there are farm-level processing facilities, such as those for honey, juices, and cheese.

One of the main challenges in the organic processed food segment is the lack of consistent supply of sufficient quantities of domestic organic raw materials. Most processing companies face issues due to a shortage of standards and small quantities of organic raw materials, which limit their production and reduce the utilization of their capacities. The number of specialized and certified facilities for secondary and storage processing is also small, further complicating the situation.

9.5. Trade with Organic Products

Statistical data on the turnover and market size of organic products are quite scarce. Data on trade are also limited, mainly due to the small quantities of organic products being traded.

According to the FiBL & IFOAM report (2024) covering the period 2012–2022, in 2022, the following operators were reported: 1 operator as an organic exporter, 5 operators as organic importers, and 18 processors of organic products. (Table 6):

Table 6. Number of organic exporters, importers and processors

year	Organic exporters	Organic importers	Processors
2012		3	11
2013	4	2	15
2014	6	0	11
2015	6	1	15
2016	6	1	17
2017	7	6	119
2018	5	4	20
2019	7	5	23
2020	9	7	24
2021	1	8	17
2022	1	5	18

Source: FiBL & IFOAM, 2024

In the official Organic Products Register at the Ministry of Agriculture, Forestry, and Water Economy (MAFWE) for 2021, 45 companies were registered as traders or processors of organic products. Most of these companies are registered for trade and processing or for trade, processing, and primary processing. Two of these companies are the largest pharmaceutical companies in the country: Alkaloid AD and Zegin, followed by other companies like Extra Fungi Dooel Trade, which is the only company that reported exporting fruit, organic farm "Lipa" and Nelkoski Organic Food, which has emerged in recent years as a major producer and exporter of organic hazelnuts and hazelnut products.

Direct payments for the trade or export of fresh or processed organic products and products in transition of domestic origin fall under Measure M215. The export and import of certified organic products to and from North Macedonia are regulated within the national legal framework. The designated government authority responsible for regulating trade is the Ministry of Agriculture, Forestry, and Water Economy (Association of Agricultural Economists, 2022).

9.6. Retail of Organic Products

The sale of organic products is organized through specialized organic product stores, markets, supermarkets, online sales via social media platforms (Facebook, Instagram), and green markets. In supermarkets or markets, sales are mainly organized in dedicated "Healthy Food" sections within the stores. Organic products sold in markets or supermarkets are typically processed goods or fresh fruits and vegetables.

The organic market remains highly dependent on imports, particularly in the processed product segment, as they are easier to source (Agence Bio, 2021). In addition to small markets and supermarkets, there are several specialized organic food stores that sell organic products both retail and wholesale under their private labels and brands (e.g., BioCosmos and Good Nature).

The retail chain DM also offers a wide range of organic food products, some of which are domestically sourced. Online trading is becoming increasingly popular, especially as a result of the pandemic, with more online stores and sales channels becoming available. Starting from 2021, the first consumer cooperative for organic food, "Dobra Zemja," and the e-shop "Bakalnica.net" have been organizing the sale of organic products at the "Market for Organic Products." Their goal is to bring these products closer to the wider public and to break the stigma that organic products are expensive, unattractive in appearance, and difficult for the Macedonian consumer to access.

9.7. Domestic Consumption of Organic Products

Domestic consumers generally lack sufficient understanding of the benefits of organically produced food. For example, in Serbia, the annual per capita consumption of organic products is €5, significantly lower than the European average of €56 (Vehapi and Sabotic, 2017). Considering the standard of living of Macedonian consumers, it is highly likely that the consumption of organic products in Macedonia is at a similar level.

In theory, consumers express preferences for organic food, but in practice, they are often unwilling to pay higher prices for these products, which significantly hinders market growth. A survey conducted by the Food and Veterinary Agency among 1,000 respondents across all regions of Macedonia revealed that consumers desire organic food. They perceive organic products as healthy but also as having limited availability—not found in all markets and retail locations, but only in select ones. A total of 21% of respondents consider organic food to be healthy, while 47% define it as natural. According to the survey, the primary concern consumers have regarding organic food is fraud and distrust. On the other hand, producers highlight branding and packaging as critical factors. They believe these are essential for gaining consumer trust. They also emphasize the need for increased market inspections and proper placement of organic products in stores. Producers describe the situation as two parallel worlds—laws, measures, and strategies on one side, and producers, reality, and on-the-ground conditions on the other. They are clear that there is consumer interest and purchasing power, but the sales channels are underdeveloped.

The Consumer Organization of Macedonia (OPM), as a prominent promoter of organic food, emphasizes the need for continuous public education and awareness. OPM advocates ensuring that what consumers buy and eat as organic is genuinely organic, verified by institutions. In this context, in 2016, OPM developed a website called "Organic World" (www.organskisvet.mk)[30] to bring organic food closer to consumers and to familiarize them with the organic food labels used in Macedonia and the EU. The development of this site was actively supported by the Ministry of Agriculture, Forestry, and Water Economy (MAFWE) and the specialized organic food store Biokult, while its promotion involved the Food and Veterinary Agency. To further enhance public awareness, in 2017, OPM, in partnership with the Association for Development Initiatives – Zenit and the Agro-journalists' association "Media Plus," launched the mobile app "Organic Path." This app provides various types of information, such as where to find or consume organic food nearby, contacts for restaurants, stores, and accommodations offering organic products, how to identify organic products, why organic food is beneficial for the environment, and more.

30 Органски свет – органска храна

10. MAIN STAKEHOLDERS IN THE ORGANIC SECTOR IN REPUBLIC OF NORTH MACEDONIA

In accordance with the National Action Plan for Organic Agricultural Production for the period 2013–2020, various groups of stakeholders (institutions, groups or individuals) are directly or indirectly involved in the organic sector. The stakeholders can be categorized into several groups:

Government institutions/agencies:

- Ministry of Agriculture, Forestry and Water Economy;
- Ministry of Environment and Physical Planning;
- Ministry of Economy;
- Ministry of Finance;
- Food and Veterinary Agency;
- Agency for the Promotion of Agricultural Development;
- Agency for Financial Support of Agriculture and Rural Development;
- State Inspectorate for Agriculture;
- Institute for Accreditation;
- Institute for Standardization;
- State Statistical Office;
- State Institute for Industrial Property.

Users:

- Federation of Organic Product Producers in North Macedonia;
- Chamber of Organic Producers;
- Organic Production Cluster;
- Associations;
- Processing Companies;
- Traders;
- Consumers of Organic Food.

1.1.1 Research Institutions:

- Faculty of Agricultural Sciences and Food, – Skopje
- Agricultural Institute, UKIM – Skopje
- Institute of Animal Husbandry, UKIM – Skopje
- Faculty of Agriculture, Goce Delčev University (UGD) – Štip;
- Agriculture High School

Main stakeholders in organic sector in North Macedonia

Certification Bodies:

- Control/Certification Body "Balkan Biosert";
- Control/Certification Body "Pro Cert"

Institutions who provide resources for the implementation of organic production:

- Ministry of Finance:
- Ministry of Agriculture, Forestry and Water Economy

Non-Governmental Organizations (Donors/Supporters):

- SDC
- SIPPO
- GIZ/GTZ
- IME
- EDGE
- USAID
- SWG
- Consumer Organization

In the implementation of organic agricultural policy, the role of the listed actors is as follows:

State Institutions:

• **Ministry of Agriculture, Forestry and Water Economy.** Within the Ministry, there are sectors and bodies directly involved in the policy on organic agricultural production: Sector for Agriculture (Department for Organic Agricultural Production), Sector for Forestry and Hunting, Sector for Rural Development, State Agricultural Inspectorate, Food and Veterinary Agency, Phytosanitary Administration, and the Seed and Plant Material Administration. To promote and develop organic agricultural production, the Government of North Macedonia adopts an annual program that sets the measures for support and development of organic agriculture, as well as the scope of funds for their implementation. The funds for financing the program are provided from the Budget of the Republic of North Macedonia,

donations, loans, and other revenues. To encourage, develop, improve, and coordinate organic agricultural production, the Minister of Agriculture, Forestry and Water Economy forms a Commission for Organic Agricultural Production that gives opinions on matters related to organic agricultural production, especially on the annual program for promoting and developing organic agriculture, proposed significant regulations, individual projects, and other issues in the field of organic agriculture. The Ministry is then obligated to publish in the Official Gazette of the Republic of North Macedonia and on the Ministry's website a list of fertilizers and soil improvement substances, a list of plant protection products, a list of substances that have not been produced according to organic farming principles, and a list of cleaning and disinfection agents that can be used in North Macedonia. The Ministry of Agriculture, Forestry, and Water Economy, based on the annual reports from the control/certification bodies, publishes an annual list of reproductive material from species that are in regular production and can be used in organic plant production. The Ministry also establishes and maintains records and databases, which are published on the Ministry's website. The Minister of Agriculture, Forestry, and Water Economy grants authorization to the control/certification body to perform technical inspections in organic farming. He also prescribes all the rules and regulations for the production of organic agricultural products in accordance with the Organic Agricultural Production Law.

• **Ministry of Environment and Spatial Planning**. It includes the Environmental Inspectorate and the State Inspectorate for Environmental Protection. In the framework of implementing organic farming policies, it is responsible for nature and biodiversity protection, sustainable use of natural resources, issuing export permits for wild-harvested plants, forest fruits, and mushrooms, and developing a network of protected areas (strict natural reserves, national parks, natural monuments, and similar).

• **Ministry of Economy**. An agency under this Ministry, which has jurisdiction over controlling the trade of organic products and is responsible for regulating domestic and foreign trade and protecting consumers, is the State Market Inspectorate.

• **Ministry of Finance**. In the framework of implementing organic farming policies, it is responsible for the budget and approval of medium-term and annual programs for financial support in agriculture, the customs system, and the enforcement of customs regulations. The Ministry is directly involved in the payment of subsidies for organic farming, as well as the funds for other programs supporting organic farming production. Additionally, this Ministry is involved in the import/export process of organic products in accordance with customs regulations related to these types of products.

• **Food and Veterinary Agency**. Responsible for tasks related to food safety and animal feed safety.

• **Agency for Promoting Agricultural Development (APAD).** Creates conditions for the development of competitive and advanced agricultural enterprises through information, counseling, education, and technical-administrative assistance, respecting the principles of good agricultural practices and the preservation of rural areas.

• **Agency for Financial Support in Agriculture and Rural Development (AFSRD)**. The role of AFSRD is to implement measures for supporting and encouraging organic farming production, and to receive, process, and pay requests for the use of state aid (subsidies).

• **Accreditation Institute of RN Macedonia (IARNM)**. The Institute is responsible for the accreditation of bodies for the control and certification of organic farming production and organic products.

• **Institute for Standardization of RN Macedonia (ISRNM)**. It is responsible for technical regulations in specific areas (national or private standards) as well as for the standards upon which organic farming production is based.

• **State Industrial Property Office (SIPO)**. In the implementation of organic farming policy, SIPO is responsible for the registration of organic product trademarks.

• **State Statistical Office (SSO)**. The State Statistical Office is a professional and independent organization within the state administration of the Republic of North Macedonia that publishes all relevant indicators related to organic production on an annual basis (areas, yields, production, number of livestock, etc.).

• **Higher Education and Research Institutions**. These institutions provide scientific personnel for successful involvement in research work in the fields of agriculture, food, and the environment; they also facilitate technology transfer through intensive cooperation with agricultural producers, processing capacities, and related institutions.

Users:

• **Federation of Organic Product Producers in North Macedonia (FPOPM)**. It represents a national umbrella organization aimed at providing coordination and leadership for the organic movement in North Macedonia.

• **Chamber of Organic Producers (COP)**. Works on establishing rules for organic production, communication systems, connecting and supporting companies and individuals, as well as continuous education and upgrading.

Certification Bodies:

In North Macedonia, there are two certification bodies accredited by the Institute for Accreditation of North Macedonia and authorized by the Ministry of Agriculture, Forestry, and Water Management:

• **Control/Certification Body Balkan Biosert.** Conducts control and certification according to standards equivalent to European regulations 834/2007 and 889/2008, enabling organic producers from North Macedonia to export to EU countries, Switzerland, and beyond.

• **Control/Certification Body Pro Cert.** Provides certification services in the fields of organic production, food safety, and primary agricultural production according to international, private, and national standards.

Non-Governmental Organizations (Donors/Supporters):

The Swiss Agency for Development and Cooperation (SDC) is one of the largest donors for the promotion and advancement of organic production in the country. The foundations for the development and functioning of organic production were established through projects supported by SDC: support for the establishment of the first certification body for organic production, the first law on organic production, the first association, the first cluster, and the first chamber of organic producers, as well as the first export of organic products.

Significant technical support was provided through a series of projects under the Program for Increasing Market Employability (IME), financed by SDC, aimed at improving business development and the competitiveness of organic producers to meet the demands of foreign markets (facilitating exports, certification, advocacy, etc.). SDC continues to support this segment by aligning legislation and sub-legal acts with those of the EU, organizing direct meetings to connect producers and buyers, training trainers for organic production, providing educational brochures on organic production, etc.

Additionally, the Swiss Import Promotion Program (SIPPO) has been implemented in North Macedonia for 20 years as a long-term mandate from the Swiss State Secretariat for Economic Affairs (SECO) as part of the economic development cooperation.

The German Society for International Cooperation (Deutsche Gesellschaft für Internationale Zusammenarbeit – GIZ; until 2011 Gesellschaft für Technische Zusammenarbeit – GTZ) is also a very active participant in the development of organic production in the country. Present through a series of projects over the years, GIZ / GTZ participated in various activities in this segment of agricultural production. GTZ organized the first training for organic production inspectors, with the theoretical part conducted in the country and the practical part conducted in Greece in cooperation with the Greek certification body. GTZ also supported and participated in working groups for preparing the organic production strategy. In cooperation with the Permanent Working Group for Regional Rural Development in Southeast Europe, in 2011 it supported the development of several publications on organic production, including the Organic Agricultural Production Guide and the Review of Regulations for Labeling and Marketing Organic Products in the Balkan Countries. GIZ supported the Ministry of Agriculture, Forestry, and Water Economy's initiative for a discussion on eco-region models, organizing a roundtable where the German model of eco-regions was presented and a study trip for representatives from the ministries of agriculture in the region.

Other active projects supporting organic production within their activities are funded by the United States Agency for International Development (USAID).

Since 2019, the Economic Development, Governance, and Enterprise Growth (EDGE) program is a regional initiative in Europe and Eurasia aiming to create inclusive, sustainable economic growth and support intra-regional and Euro-Atlantic integration. EDGE works closely with USAID missions and projects in the country. Its activities promote regionalization, reduce trade barriers, and support the growth of small and medium enterprises in three key value chains, one of which relates to fruits and vegetables.

Currently, the Permanent Working Group on Regional Rural Development in Southeast Europe (SWG RRD), in cooperation with the German Federal Ministry for Agriculture and Food, leads the Agricultural Policy Dialogue Project for the Western Balkans (APD). In 2022, the Regional Expert Advisory Working Group on Organic Production within the APD project held its first meeting, where findings from the Regional Report on "The State of Organic Agriculture in the Southeast European Region" were discussed.

11. BUDGETARY SUPPORT FOR ORGANIC AGRICULTURE IN REPUBLIC OF NORTH MACEDONIA

Organic production in North Macedonia is supported in accordance with the Law on Agriculture and Rural Development under two pillars of measures: for agriculture and rural development.

In the financial support program for agriculture, the following support measures are applied:

- Direct payments per cultivable land for all crops except tobacco – organic;
- Direct payments per cultivable land with certified seed material for all crops except tobacco – organic;
- Direct payments per cultivable land for horticultural production and flowers outdoors and in greenhouses – organic;
- Direct payments per cultivable land for the maintenance of existing fruit plantations – organic;
- Direct payments per cultivable land for the maintenance of existing vine plantations – organic;
- Direct payments per head of cattle – organic;
- Direct payments per head of all categories of sheep – organic;
- Direct payments per goats – organic;
- Direct payments for registered beehives – organic.

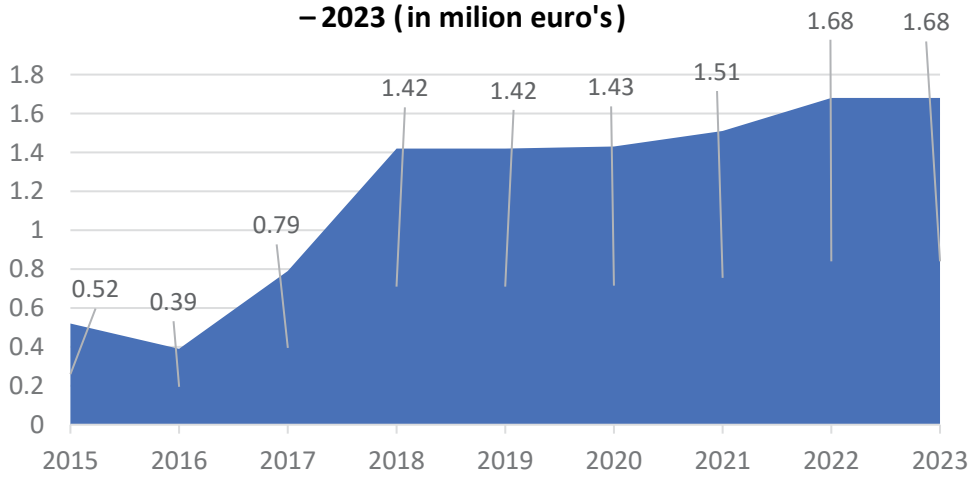
In the rural development program, organic production is supported with the following measures:

- Direct payments for the processing of organic products and organic products in transition from domestic origin (including for processing and packaging of wild species from organic origin);
- Direct payments for trade or export of fresh and processed organic products and organic products from domestic origin;
- Special direct payments for professional control and certification of organic production;
- Special direct payments for agricultural farms that have carried out agrochemical or soil analysis or analysis of organic products for pesticide residues and heavy metals;
- Direct payments for areas designated for green manure or crop rotation.

The total amount of funds paid to beneficiaries in the program period from 2015 to 2023 amounts to 12.3 million euros (Graph 6). From year to year, the amounts for support are increasing, which is expected to lead to an increase in both production and the number of producers who choose this type of production. The financial support for organic agricultural production for 2023 amounts to a total of 104,000,000.00 MKD (1.68 million euros or 1.6% of the total financial support for agriculture)[31].

31 The funds for financial support in agriculture for 2023, in the total amount of 6,437,634,000.00 MKD, are provided in accordance with the Budget of the Republic of North Macedonia for 2023 (Official Gazette of the Republic of North Macedonia, No. 282/22), section 140.04, program 2, subprogram 20, item 464 – various transfers.

Graph 6. Budgetary support in organic agriculture for period 2015 – 2023 (in milion euro's)



Organic producers, in addition to basic subsidies, receive additional subsidies to cover part of the extra costs incurred due to compliance with the rules of organic agricultural production. Direct payments for organic farming, as income support for organic agricultural producers, are realized per area, livestock head, or unit of production, and continue to represent a significant incentive for the sustainability of agricultural activity in non-polluted areas suitable for organic farming.

The support for organic production in 2023 continues with additional direct payments, with increases of 30% for forage crops, 50% for field crops, livestock, and beekeeping, 70% for fruit growing and viticulture, and 100% for horticultural production, as well as covering 50% of certification costs for organic production and 80% of costs for agrochemical, pedological, or pesticide residue, heavy metals, and similar materials analysis on soil and in organic products.

A new feature in the 2023 program is the increased support in the processing industry, under Measure 4 – direct payments for the processing of organic products and organic products in transition from domestic animal and plant origin (including for processing and packaging of wild species of organic origin). In addition to the previous 10% of the value of produced and sold products with a maximum amount of 150,000.00 MKD per operator, this year there is also financial support of 30,000 MKD per certified organic product from plant and animal production, for no more than five certified organic processed products[32].

In addition to domestic support, organic production support will also be provided through the IPARD program for the next period, Measure 4: Agroecology, Climate, and Organic Production.

32 ПРОГРАМА ЗА ФИНАНСИСКА ПОДДРШКА ВО ОРГАНСКОТО ЗЕМЈОДЕЛСКО ПРОИЗВОДСТВО ЗА 2024 ГОДИНА

12. SWOT Analysis

The analysis of strengths, weaknesses, opportunities, and threats (SWOT analysis) is based on the results derived from the current situation of organic farming in the country, SWOT analyses presented in the National Organic Production Plans 2008–2011 and 2013–2020, as well as from numerous discussions with participants in regional meetings organized by SWG.

Organic Agriculture

Strengths:

a) **Growing trend in organic farming**: Organic agriculture in North Macedonia has been growing in recent years. This refers to both the size of the land area and the number of producers, processors, and service providers.

b) **Favorable agro-climatic conditions**: The favorable agro-climatic and soil conditions in the country enable organic production of various agricultural crops.

c) **Rich biodiversity**: The diverse landscape of the country supports a variety of plant species, which increases the potential for organic farming.

d) **Traditional farming practices**: In many, especially rural areas, traditional, low-input agricultural practices are still used, which align well with the principles of organic farming.

e) **Indigenous material for cultivation and propagation**: The existence of indigenous populations with well-balanced quality, as well as local varieties with high genetic potential for yield (e.g., indigenous varieties of pepper and beans as part of the inventory and collection activities at the Department of Genetics and Breeding at the Faculty of Agricultural Sciences and Food – Skopje; the existence of a gene bank at the Agricultural Institute in Skopje that stores indigenous seeds from various agricultural crops).

f) **Growing market demand**: There is an increasing awareness and demand for organic products on the domestic market.

g) **Government support**: Availability of subsidies and financial support for organic farming initiatives.

h) **Regulated control/inspection of organic production**: Organic farming in North Macedonia has a functional inspection system represented by two certification bodies: Balkan Biosert and Pro Cert, accredited by the Institute for Accreditation of North Macedonia and authorized by the Ministry of Agriculture, Forestry, and Water Economy to conduct control in organic production.

i) **Legal framework for organic farming**: North Macedonia has defined the legal framework for organic farming through the Law on Organic Farming and related regulations, which align with European legislation.

j) **Organic farming included in formal education**: Organic farming is included in formal education at agricultural secondary schools and agricultural faculties in the country.

Weaknesses:

a) **Still low technical capacity among entities involved in organic farming**: The production of organic crops is still in a pioneering phase. This is the main reason why there is a lack of comprehensive expertise in organic farming practices, such as crop rotation planning, effective weed control, pest and disease management, and effective post-harvest management measures.

b) **Lack of propagation material**: In North Macedonia, there is only one company that imports or-

ganic seeds and planting material, which many producers cannot afford due to high prices. On the other hand, although the range of other inputs, such as organic fertilizers and protection agents, is satisfactory, there is still a lack of knowledge and expertise among organic producers about the available methods and possibilities for using permitted inputs during production.

c) **Lack of advisory staff specifically for organic farming; weak research in organic farming**: In 2023, the Agency for Promotion of Rural Development (APRD) had 66 agricultural advisors, down from 73 in 2022. The number of advisors has been steadily declining and does not match the number of agricultural farms or applicants in need of advisory services. The APRD lacks advisory services/experts exclusively for organic farming, which could provide technical support for organic farms (especially in the early years of organic production). Farmers during the transitional period particularly need training programs; the networks between research institutions (e.g., universities) or between universities, the private sector, NGOs, and associations are weak and poorly visible.

d) **Small farm sizes**: The dominance of small farms limits the scale and efficiency of organic production.

e) **Low yield potential**: Organic farming usually results in lower yields compared to conventional methods, which affects profitability.

f) **Weak sustainability and business skills of farmers**: Economic sustainability and business skills of farmers are key factors for organic farming as a development sector of agriculture in the country. Many farmers struggle with business plan preparation, securing financial support for their projects, and successfully applying for support from structural funds or the national budget.

g) **Lack of recognition of the Macedonian organic product logo**.

Opportunities:

a) **Export potential**: Organic products from North Macedonia can be marketed to the growing European organic product market.

b) **Synergy with tourism**: Rural, eco-tourism, and commercial tourism in North Macedonia provide opportunities to promote and create markets for locally produced organic products.

c) **Willingness of farmers to engage in organic farming**: This is especially evident among young farmers who are eager for innovation and to adopt knowledge based on organic principles and practices.

d) **Production of specific and high-value organic plants/products**: Agricultural producers can specialize in the production of less commercial plants and products that have high value and are in demand both domestically and on foreign markets (e.g., organic production of artichokes, broccoli, and medicinal plants in Crnicans, Dojran).

e) **Increased support from the government and NGOs**: Opportunities for stronger involvement of government institutions and international NGOs in promoting organic farming practices.

f) **Technological advancement**: Adoption of new technologies and practices that can improve productivity and sustainability in organic farming.

g) **Contract farming**: Possibility of contract farming between organic producers and buyers/processors of organic products, benefiting both parties: producers will have a guaranteed market for their products, and buyers will know that the purchased goods meet required ecological standards (e.g., organic pepper production in Bitola, Prilep, and Sv. Nikole).

h) **Media representation and consumer awareness**: More intensive campaigns to help consumers recognize the differences between conventionally produced products and certified organic products.

i) **Incorporation of fallow land into organic farming**: According to the Ministry of Agriculture, Forestry and Water Economy (MAFWE), out of 6001 ha of organic production, 1536 ha are fallow. Utilizing these areas could significantly contribute to an increase in organic production and create new job opportunities.

Threats:

a) **Global economic crisis and climate change may weaken the development of the organic sector**: The purchasing power of consumers in North Macedonia is low, and the willingness to buy organic products at higher prices is limited and could be further constrained. This not only limits the opportunities for establishing a broader domestic market but also restricts the export prospects for organic products. Climate change is often accompanied by natural disasters, which, in agriculture, and particularly in organic farming where production is outdoors, can lead to the destruction of entire agricultural crops.

b) **Low consumer awareness about organic production and products**: Consumers in North Macedonia are often unaware of what "organic" means in terms of food labeling, or what organic farming actually represents. Without this knowledge, the higher value of such products cannot be recognized, nor the willingness to accept higher prices for organic products.

c) **Labor shortage in rural areas**: Young and generally working-age people in the country are increasingly leaving rural areas. Small farms cannot use technical equipment to compensate for the labor shortage in the same way larger farms do in conventional farming conditions.

d) **Low profit margins for organic products**: Currently, the margins on organic products are such that they barely cover the additional costs of certification or organic farming production. This could hinder the willingness of other farmers to convert some of their land to organic farming.

e) **Market competition**: Increased competition from other countries with more developed organic farming sectors and lower prices could lead to stagnation in the consumption of domestic organic agricultural products.

f) **Reduced interest in agriculture-related professions**: Agriculture as a science and profession has been increasingly seen as less attractive by young people and future academics, as evidenced by the declining number of students enrolling in agricultural faculties in the country. Careers in agriculture are often perceived as less prestigious or financially rewarding compared to fields such as computer technology, finance, or medicine.

13. EDUCATION AND RESEARCH

One of the key factors in organic farming as a newly developed sector is the know-how system, a significant part of which is the educational system that prepares the necessary specialists. Organic farming is primarily studied in secondary agricultural schools and at higher educational and research institutions in the country. In secondary agricultural schools, an Organic Forum was formed with representatives from the schools to train teachers in organic farming techniques, so they can pass on this knowledge through practical classes, combining the specialties of the schools in various aspects such as composting, vegetable production, grape cultivation, and livestock farming (Trajković, 2014).

In the country, there are four higher educational and research institutions: the Faculty of Agricultural Sciences and Food in Skopje, the Agricultural Faculty in Štip, the Agricultural Institute in Skopje, and the Institute of Animal Husbandry in Skopje, which include organic production in their curricula (first and second cycles of studies) and target specific issues related to organic farming in their research projects. The Faculty of Agricultural Sciences and Food in Skopje and the Agricultural Faculty in Štip have Applied Research and Continuing Education Centers where organic farming can be further studied. However, there is still a lack of experts in this field — specifically, the educational system lacks specialists with sufficient practical experience. Research does not yet provide enough information for farmers, and very often their scope and focus do not meet the importance of organic farming, and therefore cannot satisfy the need for relevant knowledge (e.g., techniques for growing specific types of crops). Moreover, these research projects are often individual and lack networking between institutions, which makes them poorly visible, specific to a target group, and rarely accessible to the wider public. Additionally, due to insufficient and inconsistent funding for scientific research projects, there is a noticeable underutilization of research potential in the country, and consequently, a brain drain of young and capable scientists and professionals abroad.

In this context, and related to informal education, the role of the Agency for Promotion of Agricultural Development (APRD) is significant, as it offers development in agriculture, especially on a private sector. So far, the agency's structural setup does not include an advisory service or personnel with responsibilities specifically for organic farming. Therefore, it is worth considering the "integration" of an advisory network for organic production within the existing advisory service of the APRD, which would allow the agency to address the complexity of knowledge and innovation processes in organic farming and help organic producers become more compatible with broader sustainability goals.

14. THE ROLE OF THE MINISTRY OF AGRICULTURE, FORESTRY, AND WATER ECONOMY IN THE PROMOTION OF ORGANIC FARMING

The Ministry of Agriculture, Forestry, and Water Economy of the Republic of North Macedonia plays a key role in promoting organic production by supporting farmers with financial incentives, capacity building, and initiatives for market access. Among its many activities, the Ministry acts as a supporter or organizer of numerous events, such as the national food and beverage fair "Taste the Tradition through Local Healthy Food," which allows organic producers to showcase their products at their own stands. Additionally, under the Ministry's patronage, starting from 2017, some organic producers from North Macedonia have participated in the largest organic product fair, "Biofach," held in Nuremberg, Germany, which increases the visibility and market access for Macedonian organic products. These efforts aim to strengthen the organic sector by connecting producers with consumers and promoting sustainable farming practices.

15. RELEVANCE OF NATIONAL ACTION PLANS FOR ORGANIC FARMING AT THE INTERNATIONAL LEVEL

Organic farming developed around 100 years ago in various parts of the world and has been experiencing continuous growth year by year, both in terms of organic production and in processing, trade, and consumption. IFOAM Organics International, the global umbrella organization for the organic movement, distinguishes between Organic 1.0 (the early days of organic production), Organic 2.0 (market development and the regulation of organic practices with standards and regulations), and Organic 3.0. The latter represents a vision for using organic farming in the context of sustainable development, including economic, social, and environmental dimensions, contributing to the achievement of the Sustainable Development Goals (SDGs). The concept of organic farming incorporates the principles of health, ecology, fairness, and care and represents a production system based on tradition, innovation, and science, promoting a good quality of life for all stakeholders involved.

In most countries, organic regulations or national standards define the details of production, processing, and labeling, based on which operators can certify their production processes.

Since the mid-1990s, an increasing number of countries have adopted national organic action plans as a tool for coordinating and stimulating the development of the organic sector, specifying the strategies of stakeholders and guiding policies. For example, the European Commission adopted European action plans for organic food and farming in 2004, 2014, and 2020. These plans often identify goals, such as the share of organic farming in the agricultural land structure, while also creating a strategic framework, informing policy-making, and identifying necessary investments and activities from governments, often with involvement from other stakeholders (Demelezi, et all. 2022).

16. NATIONAL ACTION PLANS FOR ORGANIC FARMING IN THE REPUBLIC OF MACEDONIA

The Republic of Macedonia has so far adopted two national strategies with action plans for organic farming: the first for the period 2008 – 2011 (Ministry of Agriculture, Forestry, and Water Economy with support from the Swiss project “Development of Organic Farming in Macedonia 2005/2008”), and the second for the period 2013 – 2020 (Ministry of Agriculture, Forestry, and Water Economy with technical assistance from FAO). Both strategies provide an overview of the history and status of organic farming in the country, identifying the needs, goals, and activities that should be undertaken to promote the long-term and accelerated development of organic farming, contributing to raising awareness about organic farming among farmers, the general public, policymakers, and donors, and generating additional interest for its sustainable development. They also contribute to establishing organic farming as an integral part of national agricultural policy and rural development programs.

17. STRATEGIC AND SPECIFIC GOALS FOR ORGANIC AGRICULTURAL PRODUCTION IN THE REPUBLIC OF MACEDONIA UNTIL 2027

The strategic goals for organic agricultural production in the Republic of Macedonia by 2027 are:

- To increase the competitiveness of organic production in the Republic of Macedonia for successful placement in domestic and foreign markets; For organic agriculture to be a fully developed sector of agriculture with all appropriate characteristics, such as a stable market, services, and state policy support, including aspects related to the environment and animal welfare.
- Additionally, some of the strategic goals include:
- To achieve an effective connection between primary production and processing activities, both agricultural and non-agricultural, across the entire organic agriculture chain; To create infrastructure that will enable continuous and sustainable development while creating conditions for organic products to be a significant aspect of Macedonian organic agriculture (significantly increasing the production of organic food with Macedonian origin).

Specific goals for 2027 (according to the National Strategy for Agriculture and Rural Development of the Republic of Macedonia 2021-2027 and the National Organic Production Plan of the Republic of Macedonia 2013-2020):

1. **Primary Agricultural Production:**

- Organic production should cover 2% of total agricultural land in the Republic of North Macedonia and 2% of the total certified livestock in organic farming (including beekeeping and fishing) of the total livestock population in the country;
- To identify and support strategically important organic products;
- To improve the availability of approved raw materials for use in organic production.

2. **Processing Industry:**

- Contract Farming**:** Collaborate with organic farmers through long-term agreements to ensure a consistent supply of high-quality organic raw materials.;
- Adopting Sustainable Processing Practices that preserve the natural integrity of organic ingredients, such as cold-pressing, freeze-drying, or fermentation.
- Waste Management: Develop systems to minimize waste and recycle by-products into organic compost or animal feed.

3. **Trade:**

- To increase the assortment and quantities of organic agricultural products;
- To increase demand and consumption of organic agricultural products;
- To raise public awareness of organic food;
- To exploit the potential for organic product consumption through the development of rural tourism;
- To increase the placement of Macedonian organic agricultural products in export markets.

4. **Control and Certification:**

- To increase competition in the supply of control and certification services;
- Institutional strengthening of the monitoring system in organic production.

5. Education and Science:

- To increase the share of education in the field of organic production (both formal and informal education);
- To intensify research on organic agricultural techniques;
- To intensify and expand research on the potential of natural resources;
- To begin market research.

6. Policy and Legal Regulation:

- To institutionally strengthen and professionally train institutions involved in the organic production system (knowledge, human resources, infrastructure);
- To increase cooperation and communication between all involved and affected parties; To strengthen organic farmers' associations and other non-governmental organizations and support their networking and cooperation.

18. PROPOSAL ACTION PLAN FOR ORGANIC FARMING IN THE REPUBLIC OF NORT MACEDONIA, PERIOD 2024 – 2027

1. Organic agricultural production and processing

Area of Intervention/ Objective	Measure	Method of implementation	Responsible Entity	Time Frame
Increase of arable land under organic production	Financial support for organic certification costs	Provide subsidies to cover certification costs for farmers	Ministry of Agriculture, Forestry, and Water Economy (MAFWE)	Annually, 2025-2027
Improve soil fertility	Training on soil management and composting	Organize workshops on composting techniques and soil fertility	MAFW; Universities	Biannually, 2025-2027
Increase knowledge transfer to farmers	Strengthen extension services	Organize regular training and farm support	MAFW; Universities, APAD	Ongoing, 2025-2027
Availability of required inputs for organic farming and processing	Financial support for organic farming inputs	Subsidize inputs from the approved list for organic farming (seeds, biopesticides, organic fertilizers, pheromones, etc.)	MAFW	Ongoing, 2025-2027
Costs for farmers for conversion and certification of conventional farming to organic	Financial support for certification and conversion	Subsidies for new farmers for conversion and certification from conventional to organic farming to support and reduce risks	MAFW	Ongoing, 2025-2027
Processing capacity	Training and strengthening processing capacities	Subsidize processing capacities for organic products, including drying, packaging, and production of value-added products	MAFW	Ongoing, 2025-2027

2. Market and Trade of Organic Products

Area of Intervention/ Objective	Measure	Method of implementation	Responsible Entity	Time Frame
(Limited) Consumer Awareness of Organic Products	- Market research on demand for organic products; spreading information among stakeholders and consumers of organic products	- Promote the portal www.organicmacedonia.org.mk; inform through media (social media, television, radio, etc.); - Prepare promotional materials for organic farming; - Multiply information (consumer associations, schools, shops, NGOs, etc.); - Informational campaigns with partners and events	MAFWE/ FOP/COP	2025- 2027
(Limited) Awareness among Market Operators of Organic Products	- Market research on demand for organic products	Maintain statistics and relevant information on organic farming, as well as on organic, integrated, and conventional farming by comparing key parameters such as productivity, economic sustainability, market success, etc., including information on research and practice innovations, information on demand in domestic and foreign markets, as well as information on the best sales options for various products.	MAFWE	2025- 2027
(Limited) Awareness of the MK Logo for Organic Products	- Market research on the presence of the MK organic products logo	Public awareness campaigns; more intensive promotion (malls, markets, small traders), cooperation with restaurants and food service providers, promoting the logo at national events and fairs dedicated to organic production, establishing packaging standards and designs for organic products so that the logo can be easily identified and recognized.	MAFWE, social media, marketing agencies, traders, restaurants	2025- 2027

Area of Intervention/ Objective	Measure	Method of implementation	Responsible Entity	Time Frame
Limited Export Opportunities for MK Organic Products	- Expanding the export market	- Identify international markets with high demand for organic products, participate in fairs (individually or with countries from the region), build partnerships for export, and meet international standards	MAFWE/Ministry of Trade / Chamber of Commerce	2025- 2027
Price Competitiveness of Organic Products Compared to Conventional Agriculture	- Strategies to reduce costs in organic farming	Develop analyses for reducing costs in the production and processing of organic products that, along with subsidies for organic inputs, will make organic products more competitive in price	MAFWE, Universities/ Experts	2025- 2027
Building Consumer Trust	- Strengthening transparency in certification and labeling of organic products; more frequent campaigns to educate consumers on the benefits of organic products	Develop a digital platform where consumers can verify organic certification, with detailed information on product origin, agricultural practices, and certification status.	MAFWE / Certification Bodies / Ministry of Trade / Chamber of Commerce of the Republic of North Macedonia / Media	2025- 2027

3. Education and research in the field of organic production

Area of Intervention/ Objective	Measure	Method of implementation	Responsible Entity	Time Frame
Insufficient Scientific-Applied Research in Organic Farming	Intensify research and development programs	Domestic and international projects focused on techniques in organic farming and biodiversity protection; greater visibility of research results; networking of more stakeholders in research	Ministry of Education and Science (MES) / Universities / COP, FOP	2025 – 2027
Increase the share of organic production in formal and informal education	Introduction/improvement of curricula	Develop and integrate existing and new modules for organic farming into formal and informal education	MES/Secondary school of agriculture, Faculties of Agriculture, Agency for support and agriculture development	2025 – 2027
Insufficient Training Opportunities for Farmers on Organic Production	Conduct training and workshops for farmers	Organize workshops and practical training for farmers on organic farming practices	Universities / Experts / MAFWE	2025 – 2027

Area of Intervention/ Objective	Measure	Method of implementation	Responsible Entity	Time Frame
Improve the role of extension services in provide services in the field of organic production	Strengthen advisory services	Expansion and strengthening of the Agricultural Support and Development Agency with a department exclusively dedicated to organic production.	MAFWE	2025 – 2027

19. DYNAMICS OF THE IMPLEMENTATION OF SPECIFIC GOALS, PERIOD 2024 – 2027

Year 2024:

Research and Development:

- Start of developing a document on current practices in organic farming, yields, and market conditions.

Training and Education for Farmers:

- Develop a questionnaire for farmers covering general and specific topics on organic farming.
- Begin developing training programs for farmers on methods and best practices for organic farming (based on responses from the questionnaire).
- Organize workshops and online lectures in collaboration with agricultural faculties/institutes in the country and experts in the field of organic production.

Policy and Regulatory Framework:

- Collaboration between government and non-government institutions to find additional initiatives for supporting organic farming.

Year 2025:
(continuation of the goals outlined in 2024)

Improvement of Farm Productivity:

- Promotion of crop rotation, green fertilization, and other sustainable measures (to increase yields and soil fertility).
- Intensify cooperation between the scientific community and organic producers to adopt new technologies and skills.

Increase of Areas under Organic Farming:

- Encourage farmers from conventional agriculture to transition to organic farming through demonstration trials and involving farmers already practicing organic production to promote the economic profitability of organic farming.

Market Development:

- Develop partnerships with traders, supermarkets, and e-commerce platforms to increase the visibility and accessibility of organic products.
- Organize “Organic Farming Day” 3- 4 times a year in major cities across the country.

Public Procurement Policies:

- Encourage the use of organic products in public institutions such as kindergartens, schools, and hospitals through procurement policies that favor the supply of organic food.

By the end of 2025, the area under organic farming should reach 1.0% of the total arable land.

Year 2026:
(continuation of the goals outlined in 2024 and 2025)

Certification and Quality Control:

- Strengthen certification bodies to use group certification instead of individual certification for farmers.
- Implement regular inspections and quality control measures to maintain consumer trust.

Adoption of New Technologies:

- Develop mobile applications to provide farmers with real-time advice and market information on organic products.
- Introduce modern farming practices (soil sensors, drones, and data analysis programs) to optimize organic farming.

Biodiversity Improvement:

- Initiate programs for the conservation and promotion of biodiversity on organic farms through the cultivation of indigenous populations and varieties of agricultural crops.

By the end of 2026, the area under organic farming should reach 1.5% of the total arable land.

Year 2027:

Annual Evaluations:

- Conduct annual evaluations to assess progress towards the set goals by monitoring the following indicators: (increased) area under organic production, (increased) yield per hectare, (increased) number of operators with organic certification, (increased) level of awareness and consumer satisfaction, etc.

Communication among Stakeholders in the Organic Production System:

- Regular meetings with stakeholders in the organic production chain, including farmers, consumers, policymakers (MAFWE), researchers/educators, and the industry, to review and monitor progress.

By the end of 2027, the area under organic farming should reach 2.0% of the total arable land.

20. CONCLUSION

Republic of North Macedonia has considerable potential for organic agriculture. Despite the all optimistic indicators, organic farming and the production of organic food still face many challenges. The main barriers to the slow growth and better positioning of organic agriculture must be sought in improved cooperation between various national stakeholders and the promotion and exchange of knowledge about the advantages of organic farming, as well as more intensive marketing campaigns that would improve the positioning of organic agriculture and increase the consumption of organic products. Organic farmers in North Macedonia are often small family farms and cannot produce enough products to be competitive in the market. On the other hand, resistance and distrust towards

joining cooperatives make it difficult for them to enter the market and expand their sales. Although cooperatives are quite common and already a good, well-established practice in other EU countries, the perception of cooperatives as a legacy of the old socialist system must change. This is something that needs to be done at the national level through incentivizing measures and support for the establishment and maintenance of cooperatives. Macedonia has been facing serious depopulation in the last 20 years, and thus lacks a workforce that could be available and interested in organic agriculture. By promoting organic farming across all sectors, this could represent an employment opportunity and help reduce depopulation and/or increase repopulation in rural areas.

Nevertheless, there are many opportunities to encourage this type of production in the country. Awareness of healthy eating, sustainable food production, and environmental protection is constantly growing worldwide. In light of the COVID-19 pandemic, consumers are increasingly concerned about their health, leading to rising demand for organic products. As a country where tourism is an important industry, the enormous potential for promoting organic agriculture must also be viewed through tourism and gastronomic offers, as well as through the development of new technologies that would further promote organic products not only within the country but also beyond.

What deserves attention and should be considered when drafting future strategic plans and documents is that they should be prepared by taking into account the specific conditions *in situ*, involving as many stakeholders as possible, particularly producers and processors of organic food. It is undeniable that such documents must comply with European regulations, but they must also be adapted to the structure and conditions in the real sector. Only in this way the stable production can be achieved parallel with the successful implementation of the legal measures and regulations.

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APPENDIX

Statistical data for organic production according MAFWE

Year	Certified organic area/ha	Number of operators
2013	3168	400
2014	2359	344
2015	2632	481
2016	3240	533
2017	2900	650
2018	3909	799
2019	4207	847
2020	3957	907
2021	4277	929
2022	4815	913
2023	6001	913

Organic Plant production in 2023

crop	In transition	organic	total/ ha
cereals	859.79	1.036,13	1.895,92
forages	448.69	572.46	1.021,15
Oil crops	10.00	28.21	38.21
Industrial crops and MAP	10.41	276.6	287.01
orchards	606.49	431.91	1.038,40
vineyards	191.67	50.27	241.94
vegetables	14.51	16.23	30.74
fallow	1.283.43	252.27	1.535,7
ВКУПНО:	**3.424,99**	**2.664,08**	**6.089,07**

Organic livestock production in 2023

animal	In transition	organic	total/ number
cattle	3411	3036	6447
sheep	62986	45211	108197
goats	2.06	1735	4441
poultry	/	193	193
Organic beekeeping production in 2023			
	In transition	**organic**	**total/ number**
Bee colonies	4548	6252	10800

Organic plant production

	2021			2022			2023		
Crop	**In transition**	**Organic**	**Total ha**	**In transition**	**Organic**	**Total ha**	**In transition**	**Organic**	**Total ha**
cereals	401.23	1.287,22	1.688,46	523.85	1.125.06	1.648.91	859.79	1.036.13	1.895,92
forages	238.41	615.56		232.72	761.87	994.59	448.69	572.46	1.021,15
Oil crops	17.60	6.58	24.28	/	21.67	21.67	10.00	28.21	38.21
Industrial crops and MAP	24.45	375.71	400.17	35.28	578.39	613.67	10.41	276.6	287.01
orchards	491.67	366.88	858.55	667.47	393.45	1.060,92	606.49	431.91	1.038,40
vineyards	56.67	53.90	110.57	83.62	68.65	152.27	191.67	50.27	241.94
vegeta-bles	39.29	56.07	95.36	57.00	43.00	100.00	14.51	16.23	30.74
fallow	90.47	155.44	245.91	45.26	177.62	222.88	1.283,43	252.27	1.535,7

Organic livestock production

	2021			2022			2023		
Animal	**In transition**	**Organic**	**Total number**	**In transi-tion**	**Organic**	**Total number**	**In transi-tion**	**Organic**	**Total number**
cattle	2.677	6.587	9.264	3.282	4.957	8.239	3.411	3.036	6.447
sheep	39.797	80.478	121.01	52.980	55.727	108.707	62.986	45.211	108.197
goats	2.380	3.286	5.666	2.281	2.761	5.043	2.706	1.735	4.441
poultry	/	193	193	/	171	171	/	193	193

Beekeeping production

	2021			2022			2023		
	In transition	**Organic**	**Total number**	**In transi-tion**	**Organic**	**Total number**	**In transi-tion**	**Organic**	**Total number**
Bee colonies	4.878	6.449	11.325	4.907	5.165	10.072	4.548	6.252	10.800

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REPUBLIC OF SERBIA

MINISTRY OF AGRICULTURE FORESTRY AND WATER MANAGEMENT OF REPUBLIC OF SERBIA

THE ORGANIC ACTION PLAN OF THE REPUBLIC OF SERBIA 2024 – 2027

November 2024.

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1. INTRODUCTION

The Organic Production Development Plan (OPD) provides guidelines for the future development of organic farming in the Republic of Serbia from 2024 to 2027. It defines goals and measures whose implementation is intended to create the conditions for the long-term development of organic farming.

The first Development Plan for Organic Agriculture was adopted as an integral part of the National Program for Rural Development from 2018 to 2020 (Official Gazette of the Republic of Serbia, No. 60/18). Eleven goals were defined in this plan. Over the past six years, various measures aligned with the defined objectives have been implemented to differing extents—some fully, others partially, while certain measures remain unaddressed.

The general objective of the new plan is to increase the area under organic management over the next five years. In this respect, all future activities should aim to create the most favourable conditions for organic production.

Organic production is based on the biological balance of the soil-plant-animal-human system. According to the Codex Alimentarius definition, it is a "holistic" production system that promotes and strengthens the agroecosystem and health, including biodiversity, biological cycles and the soil. The focus is on the use of inputs that originate from farms. Organic farming may not use synthetic chemical pesticides, fertilisers, growth regulators, hormones, and genetically modified organisms. The permitted substances are clearly defined in the EU regulations. The focus is on methods and procedures for the rational use of natural resources, the cultivation of indigenous plant varieties and animal breeds that are less susceptible to diseases and pests, crop rotation, manure and compost, biological protection against harmful substances, etc.

Organic farming aims to ensure biodiversity and preserve protected natural areas. This type of food production is particularly important for the sustainable development of rural areas and for improving social and economic standards and quality of life. The principle of sustainable development is increasingly being applied to food production. Sustainable development is a new approach to business that promotes natural, human, and financial resources to improve the economy and society in an integrated way that will benefit the well-being of present and future generations.

The term has been used since 1987 when the United Nations World Commission on Environment and Development (Brundtland Commission) defined sustainable development as development that meets the needs of the present without compromising the ability of future generations to meet their own needs. Sustainability involves managing efforts to achieve acceptable growth rates following the threats and opportunities of the internal and external environment in the triangle of ecological opportunities, consumption limits and social responsibility. The concept of sustainability links entrepreneurial action with the economic and sociological structure of society and the environment. A corporate strategy geared towards preserving ecosystems, i.e., human health and safety, is implemented. The World Business Council for Sustainable Development (WBSCD) was founded, and its activities aim to promote and support the development and application of this business concept. The European Union has declared sustainability to be one of its strategic goals and is investing considerable effort in developing technologies for sustainable development. Meeting the food needs of the existing human population is just as important as preserving limited natural resources and the environment.

Through the concept of multifunctionality and the socio-cultural heritage of rural areas, the development of organic agriculture should enable an increase in exports, maintain people's health, reduce the depopulation of rural areas, develop rural tourism and link agriculture with nature reserves. The

efficiency of agriculture, including organic farming, cannot be achieved without incentive measures.

Developing and increasing organic farming requires the networking of all stakeholders in the value chain: producers (farmers), processors, consumers, scientific institutions and the state. Without co-operation, it will not be possible to improve organic farming. Farmers need more knowledge, professional training and financial support than ever before. Producers must bear the risk of new production if this support is lacking. Organic production requires greater labour input, agrotechnical measures and the right choice of propagation material. The fragmentation of farms in rural areas (smaller farms) is not an obstacle to developing organic farming.

The importance and main trends of organic production in the world

Organic production worldwide has been developing intensively for decades. In recent years, it has been a rapidly growing sector, and this positive trend is expected to continue.

According to data from the FIBL Institute and the International Federation of Organic Agriculture Movements (IFOAM)[33]In 2022, organic production is represented in at least 188 countries around the world and practised by about 4,5 million producers (200,000 in 1999). The share of organic land in the total agricultural area and the number of organic food producers are constantly growing.

The total area under organic production worldwide in 2022 was 96,4 million hectares (15 million hectares in 2000), including land in conversion. In addition to agricultural land, large areas are also used for collecting wild plant species, which, together with areas for aquaculture, forests and pastures on non-agricultural land, amounted to 34.6 million hectares in 2022.

The organic market was worth 134,8 billion euros in 2022 (15.1 billion euros in 2000). The global organic food and drink market expanded by 8.9% in 2022. Future market growth will continue to be affected by macroeconomic and political factors, which will impact organic food prices and, thus, consumer demand.

In 2022, the countries with the largest organic markets were the United States (58.6 billion euros), Germany (15.3 billion euros) and China (12.4 billion euros). The largest single market was the United States (43% of the global market), followed by the European Union (45.1 billion euros, 34%) and China (12.4 billion euros, 9.2%). Switzerland had the highest per-capita consumption in 2022, with 437 euros. The highest organic market shares were reached in Denmark (12.0%), Austria (11.5%) and Switzerland (11.2%).

At the end of 2022, organic production was applied to 18.5 million hectares in Europe, of which 16.9 million hectares were in the European Union. 480.135 agricultural producers were engaged in this production in Europe, and 419.112 agricultural producers were in the European Union.

France maintained its position as the leading country in terms of farmland under organic management, with almost 2.9 million hectares, followed by Spain (2.7 million hectares), Italy (2.3 million hectares), and Germany (1.9 million hectares). These four countries collectively account for more than half of the European organic farmland.

Organic farmland increased by 0.8 million hectares in the European Union; however, it only increased by 0.2 million hectares in Europe, mainly due to significant decreases in Russia and Ukraine. This represents an increase of 1.0% in Europe and 5.1% in the EU. To achieve the EU's goal of having 25% organic farmland by 2030, an annual growth rate of 10% is required.

33 " The World of Organic Agriculture Statistics and Emerging Trends 2024". Research Institute of Organic Agriculture (FiBL), IFOAM – Organics International

There were more than 480,000 organic producers in Europe, with almost 420,000 in the EU, with the largest numbers in Italy (82,593). The number of producers increased by 7.5% in Europe and by 9.5% in the European Union compared to 2021. There were 91,775 organic processors in Europe, a 3.9% increase compared to 2021, and 85,956 in the European Union, a 3.4% increase. The country with the most significant number of processors was Italy (23,602). In contrast to previous years, the number of importers declined: More than 7,600 (- 2.6%) were counted in Europe, and more than 6,400 in the European Union (- 1.8%). Germany had the highest number of importers (1,944).

Organic retail sales in Europe were valued at 53.1 billion euros, with 45.1 billion euros in the EU, making the EU the second-largest single market for organic products worldwide, following the United States. Germany led the European market with 15.3 billion euros in retail sales, making it the second-largest market globally. Globally, European countries lead in organic food sales shares as percentages of their respective food markets. Denmark had the highest global organic market share at 12.0%, followed by Austria at 11.5%, and Switzerland at 11.2%.

Both the European and EU organic markets experienced declines of 2.2% and 2.8%, respectively. However, in some countries, such as Estonia, the Netherlands, and Austria, retail sales increased in 2022. From 2013 to 2022, the values of Europe's and the European Union's organic retail sales more than doubled.

In 2022, European consumers spent an average of 64 euros on organic food per person (EU: 102 euros). Per capita consumer spending on organic food has doubled over the past decade. Swiss and Danish consumers topped the list, spending the most on organic food at 437 and 365 euros, respectively.

In June 2018, the European Union introduced Regulation 2018/848 for organic products, with amendments and additional regulations continuing until 2023. Notably, international trade in organic products shifted towards direct EU compliance in third countries instead of relying on equivalency agreements. The European Commission's initiatives like the European Green Deal, Farm to Fork, and Biodiversity Strategies aim to achieve sustainable food systems by 2030. However, a 2022 briefing by IFOAM Organics Europe revealed that many member states lack ambition in developing and supporting organic farming. Without significant changes in Common Agricultural Policy (CAP) Strategic Plans, achieving the goal of 25% organic land in Europe by 2030 seems unlikely.

The current Common Agricultural Policy (CAP) regulations were officially adopted by the European Parliament in a plenary session on November 23, 2021, following the approval of delegated and implemented acts. By December 31, 2021, most Member States had submitted their draft national CAP Strategic Plans (SPs). In response, the European Commission issued what is referred to as "The CAP 2023-2027 Regulations." These regulations and SPs were enacted on January 1, 2023, and will remain in force until December 31, 2027. The updated CAP introduces greater flexibility for member states in implementing their policy objectives.

The European Commission took significant steps toward achieving sustainable food systems by 2030 with the introduction of the European Green Deal in 2019 and the publication of the EU Farm to Fork and Biodiversity Strategies in May 2020.1 These strategies outlined clear objectives for this transition. The Implementing Regulation (EU) 2021/2289 mandates that Member States must "provide an explanation of the national contribution to achieving the Union´s targets for 2030" as outlined in the Farm to Fork and Biodiversity Strategies. This requirement allows the European Commission to assess the alignment and impact of proposed CAP Strategic Plans and the Union's environmental and climate legislation and commitments.

The Commission encourages Member States to develop national action plans to increase the share

of organic farming. Member States have significant differences in the proportion of agricultural land currently used for organic agriculture, ranging from 0.5% to over 25%. The National Action Plans complement the CAP National Strategic Plans by setting out measures beyond agriculture and what is offered under the CAP. They provide incentives for organic producers and continue to raise awareness and inform consumers about the importance of organic production for the environment, human and animal health and the consumption of organic products.

2. THE IMPORTANCE AND MAIN TRENDS OF ORGANIC PRODUCTION IN THE REPUBLIC OF SERBIA

Production and processing

The development of organic production in the Republic of Serbia began in the 1990s, and the last decade, it has seen intensive development, which is reflected in the following indicators: growth of the area under organic production, increase in the number of organic producers and export values, development of livestock production and the processing sector, and market development. All this shows that organic production has the potential for further accelerated development with appropriate support and incentives.

The advantage of organic production is also reflected in the fact that it is profitable even for smaller farms, which is particularly important for the agricultural sector in the Republic of Serbia, which is dominated by small farms (average area of about 6.4 hectares- Agricultural Census 20 in the Republic of Serbia), where agricultural production traditionally takes place, without the use of modern mechanisation and large amounts of synthetic pesticides and fertilisers. It is also easy to convert such farms to organic production.

Organic production is becoming increasingly important, and the demand for organic products worldwide and in our country is constantly increasing.

Producers and consumers worldwide are recognising the social and economic benefits of this type of agriculture, and its development is also being encouraged by the creation of appropriate legal frameworks, national support policies, and the promotion of research and extension services.

Considering modern consumer trends and agricultural policies, especially in EU countries, organic production is a feasible option for agricultural producers in the Republic of Serbia.

The high natural potential, consisting of favourable edaphic factors, including the physical, chemical, and biological properties of the soil, which is usually not contaminated with heavy metals and organic pollutants, and favourable climatic conditions, places the Republic of Serbia among the countries where organic production can be successfully developed.

We should also not forget the areas that fall within the scope of protected natural assets. By the end of 2023, there will be 315 protected natural areas in Serbia, with an area of about 740,000 hectares, which represents 8.1% of the Serbian territory, where agricultural production is allowed in the second and third level of protection and which are ideal places for the development of organic production.

The advantages of these protected natural areas are the high quality of water, air and soil resources and the stability of the ecosystem. Land and water resources use in this production does not disturb

the necessary natural balance. Land and water will retain their natural quality through sustainable use. Valuable habitats for rare plants and animals will have better conditions for survival. From the point of view of the development of rural areas, which are usually close to protected areas and sometimes within their borders, this type of production offers the possibility of rural development in combination with ecotourism and adds value to the food produced.

In Serbia, there is a growing trend in organic production. In 2023, the share of organic area in the total agricultural area was 0.9%. Of the total area under organic production, organic fruit production is the most common, followed by cereals and fodder plant production.

There is a growing trend in organic production areas.

The total organic area has increased by 204% over the last 10 years. The total area under organic production in 2023 increased by 16% compared to 2022.

In 2023, the total area under organic production in the Republic of Serbia was 29,109 ha. Of this area, 17.565 ha was arable land, including meadows and pastures, on an area of 11.437 ha.

Of the total organic area in 2023, 10.916 ha were in conversion, and 18.086 ha had organic status.

Table 1. Area under organic production (ha)

	2019	2020	2021	2022	2023
Area under organic production (ha)	21.265	20.971	23.527	25.035	29.002
Arable land	15.915	17.453	17.003	16.712	17.565
Pasture and meadows	5.350	3.518	6.524	8.323	11.437

Data source: Ministry of Agriculture, Forestry and Water Management

In 2023, of the total arable land, fruit production was the most common, accounting for 33.4%, followed by cereals at 30.5%. Fodder plant production represented 17%, and industrial plants 13%. Medicinal and aromatic plants made up only 2%, while vegetables accounted for 1.5%. Areas classified as “other,” including non-cropped areas, isolation belts, fallow land, and other miscellaneous crops, comprised 2.6%.

In terms of fruit production in 2023, organic raspberries were the most widespread, with production of 1,834 ha and sour cherry on 876 ha. Among the cereals, wheat was the most widespread (2.010 ha), while rye was grown at 845 ha. In the production of fodder plants, fodder pea was the most represented (1.176 ha). Sunflower is the most common industrial crop, with an area of 1.570 ha, followed by soya beans, with an area of 522 ha.

Table 2. Organic crop production by type of production (2019 - 2023)

Type of production (ha)	2019	2020	2021	2022	2023
Cereals	4.788	3.623	4.459	3.765	5.372
Industrial crops	2.226	1.294	2.122	2.075	2.286
Vegetables	184	122	170	293	224
Forage crops	1.797	3.873	3.054	2.338	3.007
Fruits	5.324	5.295	5.615	5.693	5.894
Medicinal and aromatic plants	261	391	367	375	352
Other	1.332	2.856	1.216	2.172	430
Total arable area	15.915	17.454	17.003	16.711	17.565
Meadows/pastures	5.349	3.517	6.524	8.323	11.437

Data source: Ministry of Agriculture, Forestry and Water Management

Since the beginning of the compilation of organic production records, the number of organic livestock producers has been lower than the number of organic crop producers.

This can be explained by the fact that organic livestock production is more demanding in terms of meeting additional requirements for animal housing, purchasing animals from other farms, feeding and treating animals, and developing the market for organic products of animal origin. In 2023 there was a particular increase in beekeeping (225%), poultry (165%), sheep (18.7%), and pigs (10.9%), while there was a decrease in goats (64%), horses (22.8%) and cattle (1.05%).

In 2023, the number of sheep increased by 16%, while the number of poultry decreased by 8,3%, cattle by 7%, and bee society by 88%. Total number of heads/hives in the organic production system in 2023: cattle: 8.722, sheep: 15.322, poultry 36.726, bee hives: 12.305, pigs: 190, goats: 535 and horses: 27.

Table 3. Organic livestock production (2019 - 2023)

	2019	2020	2021	2022	2023
Poultry	17.880	14.936	32.896	40.066	36.726
Bee society	9.969	12.618	11.964	103.236	12.305
Sheep	6.099	5.711	11.152	13.212	15.322
Cattle	3.556	4.627	6.708	9.423	8.772
Goats	536	286	349	522	535
Pigs	315	326	280	217	190
Horses	88	16	45	20	27

Data source: Ministry of Agriculture, Forestry and Water Management

There are a small number of producers who have a direct contract with authorized control bodies (certificate holders), as opposed to the number of producers who participate in group production. This model has proved successful in our country and is, in most cases, oriented towards export production.

In 2023, the total number of producers in organic production has decreased from 6,761 in 2022 to 6,542. Of the total number of certificate holders (677), 54 participate in group production with 5.865 cooperants.

Table 4. Number of organic operators - producers

	2019	2020	2021	2022	2023
Total number of organic producers	6.261	6.109	6.421	6.761	6.542
Number of the Certificate holder	534	596	616	510	677
Cooperators	5.727	5.513	5.805	6.251	5.865

Data source: Ministry of Agriculture, Forestry and Water Management

Since 2012, data on the export of organic products has been included in the Customs Administration's information system. This data allows monitoring the type, quantity, and value of organic products exported from the Republic of Serbia's territory.

In 2023, the value of exports of organic products decreased by 23% compared to the previous year (2022: 68.5 million euros) and amounted to 52.8 million euros.

The highest value was achieved by exports to Germany (17 million euro), the USA (6.2 million euro),

the Netherlands (5.9 million euro), France (4 million euro) and Austria (3.9 million euro). In terms of product type, the highest value was achieved by exports of organic fruit products: frozen and dried (raspberries, cherries and blackberries). The quantity of organic products exported also decreased by 9.38%.

Table 5. Export value of organic products (2019-2023)

Year	Export value (million €)
2019	29,7
2020	37,5
2021	57,4
2022	68,5
2023	52,8

Data source: Customs Administration

Market of organic products

In the last 5-7 years, Serbia has observed a more intensive development of the domestic market for organic products. This can be seen primarily in the opening of specialised markets, first in Belgrade and then in Novi Sad, as well as the opening of sales points at certain green markets, the creation of "organic corners" in the retail outlets of all major retail chains, and the establishment of specialised retail shops. Online sales and home delivery are also becoming more common.

Certified organic products in the Republic of Serbia, including imported organic products, are labelled "ORGANIC PRODUCT" designation, accompanied by the national symbol and the code/logo of the authorized control body that carried out product certification. Products of plant origin produced during the conversion period containing only one ingredient of agricultural origin are labelled with "PRODUCT IN CONVERSION TO ORGANIC" and the code/logo of the authorised control body.

Based on the comparative analysis of the market for organic products in 2020 and 2024, younger and middle-aged people (people aged 25-50) are the most likely to buy organic products.

However, there is still a low level of information and ignorance about the importance of organic production for society and the environment, which further influences many potential consumers' attitudes toward this type of food. Comparing the results of the 2020 and 2024 surveys, we see clear progress in recognising organic products in 2024. The youngest participants, 53%, read the declarations and labels on the packaging when recognising organic products. In general, there has been a shift in the recognition of organic products in four years compared to the survey conducted four years earlier.

Based on the results of both the baseline survey and the survey conducted four years later, we conclude that the health safety of organically produced food is even more emphasised as a benefit when choosing and buying organic products. The trend towards purchasing organic products is visible and recognisable; there is an increasing availability and variety of organic products in the retail sector, and different retail channels have been developed. However, retail chains are the most common way to buy organic products.

Compared to 2020, the interest in buying organic snacks and drinks has increased significantly, according to the 2024 survey, while the demand for organic milk and other organic dairy products is very

low, which is justified by the fact that some of these products have only been on the market for a few years, e.g. organic milk is scarcely available on the market, while dairy products are almost nonexistent. In contrast, their availability was obvious in 2020 and a few years before (yoghurt, fruit yoghurt, chocolate milk, white cheese). According to the results of the 2024 survey, the trend to buy fresh fruit and vegetables is still very present in three of the four consumer categories surveyed.

SWOT analysis of the organic sector in Serbia

The overview of the organic production sector in the Republic of Serbia identifies numerous positive trends and indicates that many participants in the value chain are trying to move forward in their development. While numerous factors indicate a great potential for the development of organic production, a number of important obstacles and problems still stand in the way and must be overcome (Annex 1).

Some of the main obstacles are capital limitation at all levels of the value chain, weak organization of participants along that chain, low efficiency of production, processing and marketing.

On the other hand, Serbia is on the way to the European Union. By implementing the IPARD II program, investors can finance over 60% of their investments through IPARD funds. The organic sector is eagerly awaiting the implementation of Agroecological- climate measures and measures of organic production through IPARD III, which will provide organic producers in plant production with the opportunity to access incentives significantly higher than the national ones, with long-term contracts being offered.

3. NATIONAL POLICY IN THE ORGANIC PRODUCTION SECTOR

Strategic documents of the Republic of Serbia are particularly important for defining the Action Plan for developing organic production in Serbia from 2025 to 2028. The key strategic documents with which this Action plan is aligned:

The strategy for agriculture and rural development of the Republic of Serbia for the period 2014-2024 (Official Gazette of the RS, No. 85/14) defines measures and activities for restoring and activating rural areas' development potential.

This strategy pays special attention to the reforms that must be implemented to encourage sustainable agricultural practices (agro-ecological measures, agroforestry, integrated management of natural resources, integral protection of plants, soil fertility, sustainable water management, organic agriculture), implementation of laws and regulations to prevent pollution, preservation land and water, control of indiscriminate conversion of agricultural land for other purposes, protection of forests and areas with high-value natural resources.

The planned operational goals for the implementation of the priority area related to the protection and improvement of the environment are: protection of water from the negative impacts of agriculture, greater application of agricultural practices (application of agrotechnical measures and technology) favourable to the environment, establishment and promotion of integrated production systems, improvement of organic production, control, certification and supervision systems in organic production, raising awareness of the importance of using renewable energy sources and the production of energy crops, controlled waste management from primary agricultural production, development and

improvement of the management system for secondary products of the food industry, preservation and sustainable management of plant and animal genetic resources and preservation of landscapes, agricultural areas of high natural value and their resources.

The leaders of the Western Balkans, gathered in Sofia on November 10, 2020, at the Summit of the Western Balkans within the initiative of the Berlin Process, accepted the Green Agenda for the Western Balkans, where, among other things, the commitment to the promotion of agricultural production suitable for the environment and organic agricultural production was expressed.

To implement the objectives of the Sofia Declaration on the Green Agenda for the Western Balkans, the Government of the Republic of Serbia formed a Working Group for the realisation of the set objectives, and the Ministry of Environmental Protection formed a Working Group for the development of the Environmental Protection Strategy- Green Agenda. The draft strategy is within the framework of pillar 5. Sustainable agricultural and food systems is Measure 5.1.5. Encouragement and promotion of organic production, which envisages the encouragement and promotion of organic production as a food production system based on ecological practices, a high degree of biological diversity, conservation of natural resources and the application of high standards of animal welfare and production methods using natural substances and procedures, thus contributing to the maintenance and improving soil fertility and quality, water and air quality.

The National Sustainable Development Strategy *(Official Gazette of the RS, No. 57/2008)* defines sustainable development as a goal-oriented, long-term, continuous, comprehensive and synergistic process that affects all aspects of life (economic, social, ecological and institutional) at all levels. Sustainable development implies the creation of models that meet the socio-economic needs and interests of citizens in a high-quality manner while simultaneously removing or significantly reducing impacts that threaten or damage the environment and natural resources.

The section focused on environmental protection and the preservation of natural resources in the Republic of Serbia, as well as the effects of economic development on the environment, clearly defines the goals, measures and priorities related to the protection of natural resources (air, water, soil, biodiversity, forests, mineral resources and renewable energy sources), protection against the action of various environmental risk factors, protection against the action of environmental risk factors in various economic sectors (industry, mining, energy, agriculture, forestry, hunting and fishing, transport and tourism), as well as the introduction of cleaner production methods.

4. LEGISLATIVE AND INSTITUTIONAL FRAMEWORK FOR ORGANIC PRODUCTION

Legislative framework for organic production

Organic production in Serbia is regulated by the Law on Organic Production *(Official Gazette of the RS, No 30/10 and 17/19)*, Rulebook on the control and certification in organic production and organic production methods *(Official Gazette of RS, No 95/20 and 24/21) and* Rulebook on documentation submitted to an authorised control body to issue a conformation, as well as on conditions and method of sale of organic products *(Official Gazette of RS, No 88/16).*

The Law on Organic Production lays down the following: the production of agricultural products and foodstuffs by organic production methods; objectives, principles and methods of organic production;

control and certification; processing, labelling, storage, transport, trade, import and export of organic products.

The Rulebook on the control and certification in organic production and organic production methods defines in detail the conditions to be fulfilled by the control body to perform the tasks of control and certification, the procedures of control and measures determined by the authorised control body in case of detecting irregularities in the production process, the methods of organic plant and livestock production, technological methods of processing, the requirements for storage and transportation of organic products, the content, form and manner of keeping records kept by the authorised control body, the content and form of the summary records on organic production, as well as the labelling and design of the national label.

The Rulebook on documentation submitted to the authorized control body outlines the documentation that should be submitted to the authorised control body to obtain compliance certification, as well as the conditions and procedures for selling organic products, including how imported certified organic products can be marketed as organic in Serbia.

5. INSTITUTIONAL FRAMEWORK

The Competent Authority for organic production is the MAFWM, specifically the Department of Food Labelling, Quality Schemes of Agriculture Products and Food Staff and Organic Farming (Group for organic production) within the Sector for Agricultural Policy. The group for organic production performs tasks related to:

- preparation of expert basis for the development of national regulations harmonised with the EU acquis and participation in the development of strategic documents,
- establishment and maintenance of an efficient control system in the field of organic production, ensuring compliance with conditions for control and certification;
- monitoring the import and export of organic products;
- approval of deviations from the methods of organic crop and livestock production and processing rules in organic production, use of reproductive material from conventional production after the conversion period, shortening or extension of the conversion period in organic crop and livestock production;
- keeping records and a list of authorised control organisations;
- collection and processing of annual reports on organic production from authorised control organisations;
- keeping summary records on organic production and submitting data to EUROSTAT;
- managing the database of reproductive material from organic production;
- proposing and participating in the implementation of projects in the field of organic production;
- coordination of the work of the Expert Council for Organic Production;
- cooperation and information exchange with competent institutions in the country and abroad in the field of organic production and monitoring of EU legislation in the field of organic production.

The MAFWM, or Department for Agricultural Inspection, through the inspector for organic production, supervises the implementation of the Law on Organic Production and the regulations adopted on its basis.

Directorate for Agrarian Payments (DAP), as a part of the MAFWM, is established by the Law on Agriculture and Rural Development (Official Gazette of the Republic of Serbia 41/09). The Directorate performs the activities related to the implementation of the subsidies program in agriculture, making calls for applications, deciding upon the right to assistance, making payments to the final beneficiary, performing administrative and on-the-spot checks, establishing and keeping accounting records of contractual obligations and payments, implements international assistance to agricultural policy in the Republic of Serbia, manages the Farm Register.

One of the goals of the Directorate is to fulfil the requirements for using European funds in agriculture. After achieving EU candidacy status for full membership, Serbian agriculture will become eligible for the fifth component of the Instrument of Pre-accession (IPA) related to rural development. By establishing the Directorate, a necessary institutional framework has been set up which will enable not only the use of the IPA pre-accession funds but also further integration of Serbian agriculture into EU Common Agricultural policy (after the full membership into EU), namely European Agricultural Guarantee Fund (EAGF) and European Agricultural Fund for Rural Development (EAFRD).

EU member states and the European Free Trade Association (EFTA) have established a network of national accreditation bodies called the European Accreditation Organization (EA), which enables the competence of all control and certification bodies and laboratories to be assessed according to the same principles, in accordance with international standards and procedures. National accreditation bodies, which prove compliance with the required criteria, sign a multilateral agreement (Multilateral Agreement - MLA) with EA, which enables mutual acceptance of reports and certificates issued by accredited bodies for assessing the conformity of the signatory countries and represents an effective mechanism for removing trade barriers.

In June 2011, the **Accreditation Body of Serbia (ABS)** was the subject of a “peer evaluation” by a team of EA evaluators. As a result of the successful “peer evaluation”, the Accreditation Body of Serbia signed the MLA on May 24, 2012, for the following areas of accreditation: testing laboratories, medical laboratories, calibration laboratories, control bodies and certification bodies for product certification. Also, on May 27, 2014, the Accreditation Body of Serbia signed a new Multilateral Agreement on mutual recognition of the equivalence of accreditation systems within EA (EA MLA), which now, in addition to the areas of testing, calibration, control and product certification, also includes the areas of management system certification and certification of persons.

Control system

The tasks of control and certification in organic production are entrusted by the MAFWM (Group for organic production) to different independent legal entities- control bodies. For the exercise of control and certification activities, the control body has to meet the following requirements:

- to be accredited by the Accreditation Body of Serbia in compliance with the SRPS EN 17065 standard,
- to be registered in the Business Entities Register of the Republic of Serbia,
- to have established the organisational structure and standard control procedure,
- to meet all the requirements concerning technical equipment and
- to meet all the requirements regarding human resources capacity (adequate professional qualifications and experience in performing the tasks of control and certification in organic production).

A list of authorised control bodies is published annually in the Official Gazette of the RS. The Minister withdraws authorisation issued to a control body when the body fails to meet the prescribed requirements or at its request.

For the year 2024, the MAFWM has authorised nine control organisations to carry out control and certification in organic production (Ecocert Balkan, Organic Control System, TMS CEE, SGS Belgrade, Ecovivendi, Profi lab doo Belgrade, Jugoinspekt-Novi Sad company for quality and quantity control of goods and services, CIN-Food Testing Center and Institute of Meat Hygiene and Technology Belgrade).

The Group for Organic Production is responsible for the annual office audit of authorised control bodies, while the Group for Agricultural Inspection of Organic Production within the Sector for Agricultural Inspections of the MAFWM supervises authorised control bodies and controls producers of organic products.

Harmonisation of agricultural legislation with the EU acquis

Several strategic and planning documents of the Republic of Serbia have defined as one of their goals the expansion of organic production areas, with the aim of positively impacting the environment, given that it is a production based on natural processes and the use of organic matter. The current model of agricultural development, oriented towards production growth, which implies a simultaneous increase in the consumption of natural resources, is unsustainable in the long term. A possible alternative to such agricultural development is the transition to sustainable agricultural production systems, of which organic agriculture is the most widespread and well-known form.

The current Law on Organic Production ("Official Gazette of RS", No. 30/10 and 17/2019-dr.law) was adopted in 2010, with its implementation beginning in 2011. This law was prepared in accordance with Council Regulation (EC) no. 834/2007 of June 28, 2007, on organic production and labelling of organic products, which replaces Regulation (EEC) no. 2092/91. After the adoption of new EU regulations for organic production and the entry into force of Regulation (EU) 2018/848 of the European Parliament and of the Council on organic production and labelling of organic products, as well as the repeal of Council Regulation (EC) no. 834/2007, there was a need to fully harmonise the national legislation in this area with the acquis of the EU, to develop this sector further, as well as to ensure the smooth export of organic products.

Adoption of the new Law on Organic Production is expected in 2025.

6. SUPPORT MEASURES FOR THE ORGANIC SECTOR

Organic production cannot compete with non-organic production without the help of the state, and its full economic impact is only felt after a few years. Therefore, the Ministry of Agriculture has created a special set of measures to support the development of organic production as part of its agricultural policy.

Since 2013, all subsidies in agriculture, including subsidies for organic production, have been prescribed by the Law on Incentives in Agriculture and Rural Development ("Official Gazette of RS", no. 10/13, 142/14, 103/15, 101/16, 35/23, and 92/23).

In accordance with the Law on Incentives in Agriculture and Rural Development, subsidies for organic production can be achieved by producers whose production is in the conversion period, producers who have completed the conversion period and are in the procedure for issuing certificates, and producers who have certified plant and/or livestock production.

The right to subsidies for organic production is granted to legal entities, entrepreneurs, and natural persons who are holders of commercial family farms.

One condition for receiving subsidies for organic production is that the applicant must enter into a contract with an authorized control body for the control and certification of organic production, in accordance with the Law on Organic Production, valid for the year in which the subsidy request is submitted.

In accordance with the Law on subsidies in Agriculture and Rural Development, organic production incentives include payments for plant incentives production, rebates for fuel, and/or fertiliser and/or seeds, payments for milk premiums and subsidies in animal husbandry, which are increased by a minimum of 40% in relation to the amounts of these subsidies.

Subsidies for organic production include subsidies for organic crop and livestock production.

Legal entities, entrepreneurs, and natural persons—owners of commercial family farms registered in the Agricultural Farm Register and whose production is in the conversion phase, whose crop or livestock production is certified organic, or who are part of a group certification may exercise the right to subsidies for organic production.

7. OBJECTIVES AND MEASURES. FOR THE IMPLEMENTATION OF THE ACTION PLAN

Organic food production and processing history goes back to more than thirty years.

The development of organic production in Serbia had passed some important turning points streaming its development. In 2024 was exactly:

- 34 years from the first export,
- 34 years from the civil society development,
- 24 years after the first Law on organic agriculture,
- 14 years from the first Law on organic production prepared in accordance with the EU legislation.

This action plan, which aims to develop the organic sector more intensively, defines seven needs, 16 objectives, and 25 actions (Annex 2).

Annexe 1: SWOT analysis of the organic sector in Serbia

Strengths	Weaknesses
• Sector Development Trend • Agro-ecological resources • Improved regulatory and institutional framework • Improved market control system • Improved support measures (subsidies) • Larger area of uncontaminated farmland not in an intensive production system, accelerating and facilitating conversion • Declaration against GMOs signed by 136 towns and municipalities in Serbia • Interest from international donors to invest • Organic production included in formal education in secondary agricultural schools and faculties • Training of secondary agricultural schoolteachers carried out • Free trade agreements (EFTA, CEFTA, EU, Eurasian Union, Turkey) • Measures implemented under IPARD II • Growing demand for organic products • Good trade relations established with the EU market (especially in Germany, France, Italy, the Netherlands, and Austria) • Active work of the national association • Growing producer interest in organic food recorded • Organic production base created for business association developed by Serbia Organic • Application of scientific and research projects in practice	• Insufficient achievement of efficiency and production, especially among smaller producers • Insufficient cooperation between actors in the value chain • Support measures lack continuity and long-term planning • The conditions for achieving incentives for organic production are not specifically defined but are subject to general conditions. • Lack of narrowly specialised extension support for organic producers • Lack of practical knowledge of organic production among producers • Lack of labour in rural areas • Low number of active regional/local associations • Unregulated right of first refusal to lease land to organic producers • Lack of consumer education • Low purchasing power of the population • Insufficient public awareness of the benefits of organic farming • Mistrust of organic products • Lack of recognition of organic labels • Lack of initiative to introduce organic meals/snacks in state pre-schools.

Opportunities	Threats
• Growing demand for Serbian organic products on the international market • Increasing the volume of production • Development of organic vegetable, medicinal and spice production • Development of the processing industry • Local governments are actively developing plans and measures for developing organic production. • Intensified development of organic agriculture in protected natural areas • Development of rural areas through the development of organic production • Possibility of developing agri-tourism on organic farms • Improving the production technology of small and medium-sized producers • Increasing productivity of production • Increasing employment of young people in the sector and enabling them to acquire knowledge and skills through internship programmes • A noticeable trend of young people returning to the countryside and starting family farms	• Stagnation of the sector due to insufficient support at all levels. Ineffective implementation of the new legal framework, which will be aligned with the new EU regulation and will require changes to established practices. • The sector will not be able to develop international relations and will not be able to penetrate appropriate markets. • Exports will not increase due to the development of organic farming in other countries offering a similar range of products. • The local government does not recognise investments in the development of organic production. • Continuing trend of rural depopulation • Lack of cooperation along the value chain • Failure to mobilise national and international investment • Lack of mass employment of young people in the sector • Large number of imported products on the domestic market with which domestic products are not competitive • Inadequate knowledge and consumer mistrust of organic products will slow down the intensive development of the domestic market. • The purchasing power of the population will not increase.

Annex 2: IDENTIFICATION OF NEEDS, OBJECTIVES AND ACTIONS BY PRIORITY AREAS

1. Promoting the inclusion of new producers in organic control

NEED	OBJECTIVE	ACTION	FUNDING SERVICES	RESPONSIBLE
Increase the number of new farms that are subject to organic control	Increased the number of organic producers	Higher support per ha for the conversion period (continuation of the existing system)	MAFWM	MAFWM
		Support covering the costs of organic control (continuation of the existing scheme)	MAFWM	MAFWM
	Encouraging the inclusion of young farmers (acquirers) and organic farm holders	Providing additional points and increased financial support for young organic farmers and ensuring that new entrants can also apply for the measure.	MAFWM	MAFWM
	All necessary information on organic farming and authorised products and substances in one place, publicly accessible and up to date	Establishment and operation of a public online database containing information in a single place (authorised products and substances, training materials or resources, research results, knowledge transfer, etc.).	MAFWM Donors Associations Institutes	MAFWM Associations

2. Knowledge transfer

NEED	OBJECTIVE	ACTION	FUNDING SERVICES	RESPONSIBLE
More practical knowledge for organic farmers and advisers and other target groups	Establishment of master organic farms and demonstration centres	Support for establishing and operating master organic farms, demonstration centres, and mentoring programs	Associations Donors	Associations
	Education programs meet the needs of farmers and follow trends, practical and helpful farmer training, exploring domestic and foreign examples of good practice	Increase of financial resources, upgrading and adjustment of the current system of compulsory education, also with the system of vouchers – a farmer himself shall select where to take educational courses; practical training and exploration of good practices are mandatory	Associations Institutes Donors	Associations Institutes
	Improvement of existing public agricultural advisory services	Continuous training of advisors in public agricultural advisory services in the field of organic production	MAFWM	MAFWM

3. Formal education system in the field of organic production

NEED	OBJECTIVE	ACTION	FUNDING SERVICES	RESPONSIBLE
Support for the improvement of formal education in the field of organic production within the secondary schools of agriculture and faculties.	Increased number of schools and colleges whose curricula include organic farming topics and farm visits.	Explore the possibility of including organic farming in secondary and higher education programmes, introducing organic farming and food as a stand-alone subject at all levels of education in agriculture, food processing, food safety, veterinary medicine, catering and tourism, dietetics, and health care.	Ministry of education, science and technological development	Ministry of education, science and technological development MAFWM Associations
		Improving curricula and programmes in formal and non-formal education	Ministry of education, science and technological development	Ministry of education, science and technological development
		Providing appropriate textbooks and professional literature in accordance with the curriculum of educational institutions, institutions and organisations	Associations Institutes Agricultural faculties	Associations Institutes Agricultural faculties
		Continuous improvement of the knowledge of teaching, educational and professional staff	Institutes Agricultural faculties	Institutes Agricultural faculties

4. Starting organic production in protected areas

NEED	OBJECTIVE	ACTION	FUNDING SERVICES	RESPONSIBLE
Starting organic production in protected areas	Increasing the area under organic production in protected areas	Education of protected area managers on organic production	MAFWM	MAFWM Institute for the Protection of Nature
		Development of organic production guides and programs for various protected areas	Institute for the Protection of Nature Donors	Institute for the Protection of Nature
		Development of a guide for producers	Institute for the Protection of Nature Donors	Institute for the Protection of Nature
		Promoting protected areas in the context of the possibility of implementing organic production	MAFWM Institute for the Protection of Nature	MAFWM Institute for the Protection of Nature

5. Organic food in the public procurement system

NEED	OBJECTIVE	ACTION	FUNDING SERVICES	RESPONSIBLE
Database of organic products	More organic food in public institutions	Creating a database on organic products	Donors Associations	Associations MAFWM
		Support to producers, producers organisations and cooperatives for free listing in the database of organic products	MAFWM Associations	Associations
	All information is in one place, transparent, and up-to-date offer	Promotion and updating of the database of organic products for public procurement	MAFWM Associations	Associations

6. Support for the export of organic products

NEED	OBJECTIVE	ACTION	FUNDING SERVICES	RESPONSIBLE
Growth in the value of organic food exports	More organic food for export	Refunds of part of the control costs for organic products that are certified in accordance with EU regulation and NOP	MAFWM	MAFWM
	Increasing share of pre-packed organic food for final consumers	Support for investments in processing and marketing of agricultural and food products	MAFWM	MAFWM
	Promotion of domestic organic products at international fairs	Training of future exporters of organic products related to entering the foreign market	Chamber of Commerce of Serbia Donors	Chamber of Commerce of Serbia
		Financial support for organic producers to participate in international fairs	Development Agency of Serbia Donors	Development Agency of Serbia

7. Improvement of the domestic market of organic products

NEED	OBJECTIVE	ACTION	FUNDING SERVICES	RESPONSIBLE
A more significant share of organic products on the domestic market	Increasing sales of domestic organic products	Organising a national promotional campaign on the values and importance of organic production	MAFWM	MAFWM
	Increasing consumer confidence	Organising visits to organic farms	Associations	Associations
		Consumer education about organic production and the efficiency of the control system	MAFWM Associations	MAFWM Associations
	Creating links between organic producers for join market presence, easier and more efficient integration into market chains	Connecting the association of organic producers with market chains	MAFWM Associations	MAFWM Associations

8. Abbreviations

ABS	Accreditation Body of Serbia
CAP	Common Agricultural Policy
DAP	Directorate for Agrarian Payments
EFTA	European Free Trade Association
EAGF	European Agricultural Guarantee Fund
FAO	Food and Agriculture Organization of the United Nations
IFOAM	International federation of organic agriculture movements
IPARD	Instrument for Pre-Accession Assistance in Rural Development
MAFWM	Ministry of Agriculture, Forestry and Water Management
EA MLA	European co-operation for Accreditation Multilateral Agreement
REAWG	Regional Expert Advisory Working Group
SWG	Regional Rural Development Standing Working Group of South Eastern Europe
SWOT	Analysis of Strengths, Weaknesses, Opportunities and Threats
TAIEX	European Commission's Technical Assistance and Information Exchange Instrument

9. Literature

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