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AgBiz Program

FOURTH FISCAL QUARTER REPORT
JULY - SEPTEMBER 2007

October 2007

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AgBiz Program

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AgBiz Program

FOURTH QUARTER FISCAL QUARTER REPORT JULY - SEPTEMBER 2007

OCTOBER 2007

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ACRONYMS AND ABBREVIATIONS

APS	Annual Program Statement
ANUGA	Bi-annual Food Trade Fair in Cologne, Germany
EU	European Union
F&V	Fruits and Vegetables
FFPS	Firm fixed Price Sub-contract
GoM	Government of Macedonia
LAMP	Linking Markets and Agricultural Producers
NR	Not Required
PMP	Performance Management Plan
PO	Producer Organization
SME	Small and Medium Enterprise
SoW	Scope of Work
USAID	United States Agency for International Development

1.0 EXECUTIVE SUMMARY

The Fourth Quarter of FY '07 was only the second full quarter of operations for USAID's AgBiz Program. The primary focus during the quarter was on establishing the base for ongoing AgBiz operations.

This included prioritizing potential value chains, selecting the seven value chains AgBiz will be involved with in FY '08 and arranging the seven into three tiers with differing objectives. This work was completed in the Fourth Quarter. The three Tier One, defined as aggressive identification and development of proposals and entire value chain competitiveness enhancement activities, value chains are Processed Vegetables, Fresh Vegetables and Wild Gathered Food Products. The two Tier Two, defined as aggressive identification and development of proposals only, are Bottled Wine and Table Grapes. The two Tier Three, defined as reacting to proposals from participants in these value chains but minimal proactive solicitation of proposals, are Lamb and Dairy.

Important program development work related to establishing the base for ongoing operations included developing and gaining USAID approval for the '07 AWP, PMP, Grants Manual and Branding and Marking Plans, establishing Internal Policies and Procedures, including the Employees Manual were developed; holding a workshop with potential Macedonian BSPs to introduce AgBiz, explain how we will be operating and the role of BSPs in program implementation; the development of an Agribusiness Development Annotated Bibliography; and an assessment of the "Optimal Role of PO Development in AgBiz"; and a workshop with LAMP managers in Sarajevo to obtain Lessons Learned and Best Practices form that very successful and mature project.

Significant project related work in the quarter included: 1) completion of a successful trial shipment of fresh produce to the UK and supporting the export of Bambolino melons; 2) signing project agreements to add a retail line to a customer's dried wild mushroom business, to help a customer assess and develop an Internet-based selling system for their premium wine, and to provide substantial technical, marketing and financial assistance to optimize the participation of eleven members of the Macedonian Association of Processors in the ANUGA Trade Fair in Cologne, Germany; and 3) developing projects to provide TA and other marketing-related services a major food processor, including starting up a new muesli drying line and linking spring planting flowers producers with retailers of spring planting material to offset imports of those products.

Project support related activities during the Quarter included launching the development an "Alternative Sources of Agribusiness Finance Manual," and providing technical and financial support to Novi Sad University of Serbia and Cyril and Methodius University of Skopje to enhance a Regional F&V Post-harvest Workshop.

The primary focus of AgBiz in the First Quarter of FY '08 will be on 1) the solicitation, development and signing of proposals in the Tier One and Two value chains, 2) the identification of activities that will enhance the competitiveness of the Tier One value chains, 3) monitoring the successful implementation of signed projects and 4) on hiring the Cross-Cutting Services Specialist, completing the Alternative Sources of Agribusiness Finance Manual and associated workshop, launching the AgBiz website, adapting and installing the LAMP customer information system, stimulating the development of a Regional Agribusiness Competitiveness Enhancement Coordination Workshop, and completing an assessment of Russian and EU market opportunities for Processed Vegetables customers.

AgBiz believes if is well prepared for making significant progress toward its FY '08 objectives in the First Quarter of FY '08.

2.0 FOURTH QUARTER ACTIVITIES

Since the AgBiz team arrived in Macedonia at the end of April, this Quarterly Report covers activities for just the first five months of the Program, with emphasis on the July – September 2007. All references to "Quarter" below refer to the Fourth Quarter of FY '07.

1.0 PROGRAM-RELATED ACCOMPLISHMENTS

Following are highlights of program-related accomplishments in the five months of FY '07 during which AgBiz was operational.

1.1 Office facilities were identified and occupied; all but one staff member were identified, screened, selected and hired; the firm was registered; bank accounts were opened, and equipment and vehicles were acquired or transferred.

1.2 The '07 AWP, PMP, Grants Manual and Branding and Marking Plans were developed, and all but the Branding and Marking Plans approved by USAID.

1.3 Internal Policies and Procedures, including the Employees Manual were developed; staff was trained in their use.

1.4 A workshop was held with potential Macedonian BSPs to introduce AgBiz, explain how we will be operating and the role of BSPs in program implementation.

1.5 An Agribusiness Development Annotated Bibliography; AgBiz aims to contribute to the sustainable and commercially viable development of a competitive Macedonian agribusiness sector. However, the program needs to utilize the work of previous projects and avoid repeating agribusiness sector development work where a sub-optimal focus was taken. To help achieve this objective AgBiz approached local consultants requesting them to collect and review all relevant documents, dated January 2003 and later, that relate to Macedonian agriculture, agribusiness, horticulture, and floriculture studies and support, including such topics as agricultural finance, production input supply, marketing, and environmental activities, including organic developments. The Bibliography is now available on the AgBiz website, and will be offered to the Ministry of Agriculture as a resource.

1.6 The "Optimal Role of PO Development in AgBiz" Assessment was completed and the results are being used to guide AgBiz work with POs.

1.7 Significant research and evaluation was completed on prioritization of the value chains AgBiz will focus on in FY '08 and later years.

For FY' 08 potential value chains were classified into three tiers.

Tier One - three value chains (Fresh Vegetables – especially peppers, tomatoes and cucumbers, Processed Vegetables – glass packed, frozen and canned, and Gathered Wild Food Products – especially wild mushrooms and berries) were chosen for primary focus. Primary focus means aggressive solicitation, screening and development of proposals from private sector participants in these value chains, and an investigation of ways to implement entire value chain competitiveness enhancement activities. Wild Gathered Products value chain development work will be accomplished in close coordination with SIPPO who has been working in this area for quite some time.

Tier Two - two value chains (Bottled Wine and Table Grapes) were selected for secondary focus, i.e., proactive identification of good proposals, but not value chain wide competitiveness enhancement.

Tier Three - two value chains (Dairy and Poultry) were classified for tertiary focus, i.e., proposals from private sector participants in these value chains will be accepted for consideration, but we will not actively seek proposals from those firms.

Phase One of the value chain prioritization work narrowed 42 different products down to 12 value chains based on sector professionals' research and opinions. Phase Two incorporated market and post-harvest participants' input into the assessment and prioritization. Input from three export markets (Greece, Croatia and Kosovo) was also included in Phase Two. In Phase Three all information collected in Phases One and Two were utilized to do a consensus-based comparative prioritization of the eight highest ranking value chains. The results of Phase Three are shown in Table 1. A green cell indicates a serious comparative advantage for that value chain as related to that criterion, and an orange cell equates to a serious disadvantage. In other words, several green cells resulted in a high ranking value chain and several orange cells resulted in a low ranking value chain. The yellow cells contain the data that were used to determine some of the comparative rankings. The bottom row of this table also illustrates the impact of excluding a focus on exports from the assessment.

1.8 Support for updating and printing the Ministry of Agriculture's "Facts and Figures" brochure for the Agricultural Fair

This activity with the Ministry of Agriculture allows the Ministry to publish facts and figures from the recent agricultural census and distribute them at the Agricultural Fair that starts on October 1. This information will give agribusinesses an opportunity to assess the current situation in the agricultural sector and is a means of building the relationship between the Ministry and AgBiz/USAID.

1.9 Workshop with LAMP Managers to Obtain Lessons Learned and Best Practices

Six AgBiz staff traveled to Sarajevo for a two-day workshop with LAMP managers to learn from their successes, especially as related to regional exports, and identify resources and methodologies AgBiz could adapt from LAMP. This was a very useful series of meetings and AgBiz managers obtained many insights and mechanisms that will be applied to AgBiz. We also arranged for the excellent LAMP customer management data base to be transferred to AgBiz.

1.10 Other Program-level Activities

1.10.1 A briefing on the Program was presented to the Mission Director followed by a field visit to a watermelon customer, and we presented a Program briefing to the new EG Director and escorted her on a field visit to AgBiz customer Inter-Mak
1.10.2 For Outreach the AgBiz brochure was designed, approved and printed; design of the AgBiz website was nearly completed; and the CoP did an interview regarding the Program on Macedonian TV
1.10.3 Coordination meetings were held with Other Donor related projects such as the WB, SIPPO and FAO, and with MAFWE
1.10.4 A Lessons Learned and possible follow-up projects meeting was held with Seal of Quality/LOL management
1.10.5 A waiver to support wine projects was prepared and received approval from USAID
1.10.6 A staff two-day off site Team Building and AWP Workshop was successfully implemented
1.10.7 The FY '08 AWP was drafted and internally agreed

TABLE 1 - AGBIZ VALUE CHAIN SCORING

CRITERIA VALUE CHAIN	FRESH TOMATOES, PEPPERS, CUCUMBERS & OTHER SIGNIFICANT VEGETABLES	PROCESSED VEGETABLES - ESPECIALLY CONTAINING PEPPERS	GATHERED, WILD FOOD PRODUCTS - MOSTLY MUSHROOMS & WILD BERRIES	BOTTLED WINE	TABLE GRAPES	BROILERS	DAIRY PROD-UCTS	LAMB
EST. EXPORT SALES (MILLION EUS)	**22.6**	**5.6**	**12.5**	**9.6**	**4.2**	**0**	**1.4**	**11.8**
Export Markets Size & Growth Potential	9	7	6	7	4	1	1	5
Current Compliance with the Export Market Requirements	7	7	7	6	4	1	1	7
Ease of Export Procedures	7	7	7	5	7	1	1	5
Competitive Position	6	5	7	3	6	3	3	7
Potential for Increased Demand for Raw Materials	6	4	6	4	6	5	3	6
Potential to Increase the Value Added in Macedonia	4	5	7	7	4	7	5	1
Current Imports	3	7	3	3	2	10	10	2
VALUE OF CURRENT IMPORTS (MILLION EUS)	0					18.8	29.4	
Potential to Increase Farm Gate Returns	7	5	5	6	6	3	5	3
Realistic Potential to Increase the Competitiveness of Macedonian Products	6	5	5	3	6	8	5	2
NUMBER OF COMMERCIAL PARTICIPANTS	4,500	7,500	8,150	30,000	15,000	200		9,200
Current Significance to the Macedonian Economy/Potential for Broad-based Impact	6	7	5	7	5	1	5	4
Cost to Develop	6	4	8	2	6	6	4	4
Ability to Leverage	4	6	5	3	4	5	8	5
Level of Potential Customer Interest/Cooperation	5	6	7	8	4	4	4	2
Potential to Achieve a Positive Impact in Less than 4 Years	5	6	6	3	3	8	7	2
Total Score	**81**	**81**	**84**	**67**	**67**	**63**	**62**	**55**
Excluding Exports	**58**	**60**	**64**	**49**	**52**	**60**	**59**	**38**

Comparative Strength — Comparative Weakness — Highest Priority Value Chains

2.0 PROJECT-RELATED ACCOMPLISHMENTS

Following are highlights of project-related accomplishments in the last five months of FY ’07 during which AgBiz was operational.

2.1 *A Fast Track project for a trial shipment of fresh produce to the UK was successfully completed.*

AgBiz helped Univerzal Promet prepare and deliver a test shipment of watermelons and selected vegetables to a UK buyer. Each piece of fruit had to weigh between 4 – 4.5 kilos and be packed in cartons with a total weight of no more than 25 kilos. AgBiz helped source the cartons and provided guidance on quality control procedures. The UK importer not only approved the test shipment of watermelons, but indicated interest in taking test shipments of other fruit and vegetables including peppers, eggplant and apples. Universal Promet has experience exporting to other Balkan countries—but this is a breakthrough into the lucrative European market.

This project was made into a Success Story that appeared on the USAID website.

2.2 A Fast Track project for exporting Bambolino melons

Following a July AgBiz visit to Agrohemija, a company based in Southern Macedonia, it was clear they required immediate assistance to develop a system for the packing and shipping a specific type of water melon, branded as Bambolino. The company was clearly struggling to pack a consistent quality of product. AgBiz believed that the potential of this crop as a substitute for traditional watermelon exports to the region was a very good reason to help this pioneer with his effort to achieve a consistent quality for his Austria and Germany customers. Immediate suggestions were made to improve the packing and traceability of the product. Following the AgBiz visit, Agrohemija was asked for several specification checks by their buyers. Therefore, the company became convinced it was necessary to start doing a better job of tracking specs and coding production, as recommended by AgBiz.

AgBiz then to meet with the managing director of the company and developed with him a simple quality control system that would help him effectively respond to buyers’ questions. We also gave him use of a brix meter so that he could check sugar levels in his products on a regular basis. Although it has been a successful season for the company, they exported over 60 trucks to EU markets, we believe further improvements are necessary in the company’s management of fresh product sales for the 2007/8 season, and will pursue follow on work with them.

2.3 A Fast Track project to help a customer add a retail line to his dried wild mushrooms business

AgBiz is working with Mr. Tose Kostadinov, the owner of Inter-Mak, who has vast experience in collecting, processing and selling wild mushrooms. As a family company Mr. Kostadinov and his son are responsible for managing all operations, including organized purchase of fresh mushrooms from collectors throughout the whole country. The main varieties collected are porcini and chanterelle, but the collectors also gather shiitake as well as other wild forest fruits like blueberries and juniper berries. The Inter-Mak processing facility, located in Veles, provides full time employment to 5 people and approximately 55 (on average) people, mainly from the Veles region, are involved in processing throughout the year. During collecting season 30 suppliers with around 2,500 collectors from all over the country supply raw material.

AgBiz will work to develop and implement the following activities in phase one of the project: 1) create a company brochure and website that will promote a full range of products including the new added value items to be developed, 2) develop new samples of added value products to test the retail market at various trade fairs, 3) use an international consultant to help with the development of samples and customers in the UK and US markets, and 4) produce a schedule and visit Trade Fairs to develop buyer contacts for wild mushrooms retail packs.

Assuming success in Phase One, Phase Two of the project will further develop value added sales for the company, and initiate a pack-house study to assess and implement effective product development and production. This will include a full business plan, and potentially a grant to help implement the business plan and pack-house development recommendations

2.4 A Fast Track project to help a customer assess and develop an Internet-based selling system for their premium wine

Fonko Winery's concept is to change the traditional low quality bulk sales of Macedonia wines into a medium price range of bottled wines for the young middle class of exiting or emerging markets. Fonko's objective provides AgBiz an opportunity to illustrate to the rest of the industry the potential for improving their sales. Due to ongoing EU integration and controls on bulk wine sales via reduced export quotas, any initiative that increases bottled sales to the EU is very positive for the Macedonia economy. AgBiz believes that Internet sales are a marketing trend that will increase in the EU. Wine delivered to your door step is becoming common practice for the EU middle classes, especially in Northern Europe.

2.5 A multi-company project to provide substantial technical, marketing and financial assistance was to optimize the participation of selected members of the Macedonian Association of (F&V) Processors in the ANUGA Trade Fair in Cologne, Germany

MAP was established in March 2002 and is a non-for-profit organization registered in accordance with the law on associations of citizens and foundations in the Republic of Macedonia. The association organizes joint purchase of raw materials to produce competitive final products; takes part in meetings related to the processing industry, and creates an environment for joint export of MAP members' products to meet large order size demands of foreign buyers. It also coordinates members' activities to acquire HACCP and ISO standards and distributes information to members, especially regarding market trends and regulations of the EU and other target markets. The association hopes to strengthen the cooperation with farmers and farmer associations to mutually plan activities, and acts to establish cooperation with private and public institutions, the business community and international projects active in Macedonia.

AgBiz developed a project for eleven MAP member companies participating at the ANUGA Trade Fair so they can create new, sustainable EU sales and enhance their understanding of how to successfully utilize major trade fair participation to effectively develop new sales contacts. The project will also help refine participants' skills in business-to-business contacts, so companies can work together when developing sales strategies for the large and competitive EU markets. This project includes significant follow-up work to optimize the results of ANUGA participation.

2.6 A project to provide TA and other marketing-related services a major food processor, including starting up a new muesli drying line

Following an AgBiz visit to Vitalia concerning their participation in the ANUGA Trade Fair, it was obvious that installing and setting up their new production line for muesli toasting is of great importance to the company as it will enable them to produce better quality crunchy muesli consistent with their primary competitors, and at competitive prices. After the muesli toasting line is operational, a large quantity of the required raw materials will be purchased domestically, and Vitalia will import only ingredients that are not being produced in Macedonia. The vast majority of the final product will be exported. Therefore, AgBiz and Vitalia developed a project proposal for effectively and efficiently starting and operating the new production line.

AgBiz will provide technical assistance to Vitalia by identifying and engaging international technical expertise to work with Vitalia to identify the types of finished products that would be most suitable for their new single stage Proctor & Schwartz Conveyer Dryer. AgBiz will also work with Vitalia to develop formulas and raw material specifications for their selected product lines, to produce attractive crunchy muesli products with high quality and at a competitive price for the EU market.

On the marketing side, AgBiz will also support Vitalia participation in a Private Label Trade Fair in Amsterdam to establish new contacts and strategic partnerships for increasing private label export sales of Vitalia products to EU markets.

For the Ukraine AgBiz will support promotional and trade activities for the successful launch of their products in that market, including support for a Ukraine based consultant to create a detailed market survey and business plan, plus developing a selling strategy and recommendations for trade support activities for Vitalia products.

2.7 *A Fast Track project in the late stages of development to link spring planting flowers producers with retailers of spring planting material to offset imports of those products*

AgBiz will help Macedonian producers verify via practice that imports of spring planting annuals can be sustainably replaced by domestic production. We will help establish a system and structure for doing so on an ongoing basis, i.e., a business structure that will lead to producer cooperation in supplying flowers to the domestic market on a highly competitive and sustainable basis, and in the future give an expanding group of producers the opportunity to develop both domestic and regional sales of spring annuals planting material. AgBiz with the help of an external consultant, has identified producers that have the capacity to deliver spring planting flowers, under contracts with tight specifications, to domestic wholesalers and retailers in the spring of 2008. It is anticipated that these producers and others can be developed into a "market orientated producer organization" after the 2008 selling season, and identified buyers of spring annual plants will commit, via a contract, to replacing imported plants with domestic production, because they are competitive with current imports.

In addition, we have developed model sales contracts that have been discussed with and are acceptable to both the buyers and producers and clearly defined the detailed production systems and procedures that will be used to produce the required quality and schedule of spring plants for the contracted market.
In addition, AgBiz staff has identified the precise credit requirements of the individual producers, recommended sources and costs of financing, and is in the process of developing a proposal, including cost and timing, for implementing Phase Two of this activity.

Table 2 shows the status of proposals received and projects being implemented as of 31 September 2007.

2.8 *Project Support Activities*

2.8.1 An activity was launched to develop an "Alternative Sources of Agribusiness Finance Manual."

AgBiz, working in concert with its partner Crimson Capital, needs to help customers in the selected value chains secure cost and terms effective financing for their competitiveness enhancement activities and sales contracts. To that end the program is developing an Alternative Sources of Agribusiness Finance Manual that will identify current, or could be made currently available, project finance alternatives from government-linked banks, private banks and other financial and market-based institutions (domestic, international, private retail, secondary market, trade associations and private firms). The Manual will also define which of these alternatives can best serve the needs of AgBiz proponents' current and future project finance needs. The Manual will also look at the donor community and governments as sources of finance for agribusinesses in Macedonia.

The Manual will not only help Program customers, but also AgBiz managers to assess the present structure of customer finances and offer advice on alternative business credit. In addition the Manual will be used as tool to promote the use of debt by Macedonian agribusinesses.

2.8.2 An activity to provide technical and financial to Novi Sad University of Serbia and Cyril and Methodius University of Skopje to enhance a Regional F&V Post-harvest Workshop to be held in Ohrid in mid-October

AgBiz is working with the two universities to increase the commercial focus of this regional conference. We have subcontracted a Macedonian consultancy company with close links to the organizers to help accomplish this objective. The universities have agreed to allow a half day of the conference to be devoted to commercial and marketing F&V speakers from various countries. These speakers will give the audience an understanding of what the F&V market demands and their specific needs.

TABLE 2 - PROJECT STATUS REPORT

30-Sep-07

PROJECTIONS

PROPOSAL NUMBER	CUSTOMER	VALUE CHAIN	PRODUCTS	TOTAL COST (000 US$)	AGBIZ COST (000 US$)	AGBIZ %	SALES GROWTH (000 EU)		RURAL HOUSEHOLDS BENEFITED		INCREASED EMPLOYMENT		INCREASED RAW MATERIAL PURCHASES (000 EU)		FINANCING IDENTIFIED (000 US$)		CUSTOMER INVESTMENT (000 US$)	
SCREENING																		
	3 Growers	**Flowers**	Spring Planting Flowers															
ASSESSMENT																		
	Vitalia	**Processed Foods**	Muesli	53.9	24.5	45.4	220		15		10		130		0		29.4	
DEVELOPMENT																		
	MAP	**Processed Vegetables**	Various	109.6	24.6	22.5	600		110		10		200		0		43.8	
IMPLEMENTATION																		
							Actual	**Projected**	**Actual**	**Projected**	**Actual**	**Projected**	**Actual**	**Projected**	**Actual**	**Projected**	**Actual**	**Projected**
	Inter-Mak	**Wild Products**	Mushrooms	24.249	12.124	50.0	0	300	0	2	0	2	0	0	0	0	0	200
	Fonko	**Bottled Wine**	Wine	41.500	21.66	52	0	200	0	50	0	0	0	0	0	0	0	19.925

Actual Results Upon Completion

PROPOSAL NUMBER	CUSTOMER	VALUE CHAIN	PRODUCTS	TOTAL COST (000 US$)	AGBIZ COST (000 US$)	AGBIZ %	SALES GROWTH (000 EU)	RURAL HOUSEHOLDS BENEFITED	INCREASED EMPLOYMENT	INCREASED RAW MATERIAL PURCHASES (000 EU)	FINANCING IDENTIFIED (000 US$)	CUSTOMER INVESTMENT (000 US$)
COMPLETED												
		Fresh Vegetables	Watermelons	8.1	2.8	28.9	8.0	2	0	1.0	0	0
Completed and Implementation Total												
REJECTED												
							Reasons for Rejection					
ON HOLD WAITING FOR ADDITIONAL CUSTOMER INPUT												

2.8.3 An Activity to support the Regional Sheepherders' Field Day held on Bistra Mountain

AgBiz, in collaboration with GTZ and the Land O'Lakes USAID project, helped fund this event in 14 July. AgBiz supplied the judges for the sheep and goat cheese contest as a traditional forum for the Shepherds. The event highlighted sheep-based products being produced, developed and sold in Macedonia.

2.8.4 Relevant Trade Fairs Report

AgBiz produced a report on most of the relevant agribusiness-related trade fairs that will take place in the next 12 months. The listing will be used by AgBiz staff and potential customers to identify the most relevant trade fairs as related to understanding export markets and marketing their products.

Table 3 shows agreements signed and/or under development during the Fourth Quarter.

TABLE 3 - CONTRACTS SIGNED OR BEING DRAFTED DURING THE FOURTH QUARTER

Number	Company/Person	Type of Contract	SUMBITED TO USAID	USAID CO	USAID CTO	Signed	BTV		
7	Jaton Starova	Employment contract	25-Jul-07	9-Aug-07	9-Aug-07	3-Sep-07	8-Sep-07		
								Amount	USD
001/2	MCG ANUGA Extension	FFPS	4-Oct-07	NR	9-Oct-07	3-Oct-07		$1,062.00	$1,062.00
LOI006	Panex ANUGA Stand	LOI	20-Sep-07	NR	9-Oct-07	4-Oct-07		5,500.00 EUR	$8,800.00
LOI004	Panex Video	LOI	20-Sep-07	NR	9-Oct-07	4-Oct-07		12,500.00 EUR	$20,000.00
	TOTAL								$29,862.00
006	Smart Solution	FFPS	NR	NR	NR	25-Jul-07	26-Jul-07	224 EUR per month	
	Crimson Capital Finance Guide	FFPS	9-Sep-07	BTV	BTV	BTV	BTV		
007	EPI Centar Value Chain 2	FFPS	7-Aug-07	NR	7-Aug-07	8-Aug-07	7-Aug-07	6,500.00 EUR	$10,400.00
007/1	EPI Centar Customer data base	FFPS	9-Oct-07	NR	9-Oct-07	9-Oct-07		2,000.00 EUR	$3,200.00
	TOTAL								$13,600.00
008	MCG Ohrid Conference	FFPS	4-Oct-07	NR	9-Oct-07	2-Oct-07		177,120.00 MKD	$4,071.72
LOI005	Sts. Cyril and Methodius University, Ohrid Conference	LOI	4-Oct-07	NR	9-Oct-07	2-Oct-07		4,000.00 EUR	$6,400.00
	Saso Risteski-Ohrid Wavier	Consulting contract	25-Jul-07	9-Aug-07	NR	27-Jul-07	11-Sep-07	$1,826.30	$1,826.30
	TOTAL								$12,298.02
LOI001	Itermak	LOI	30-Aug-07	NR	30-Aug-07	28-Aug-07		$12,091.00	
LOI002	Fonko	LOI	30-Aug-07	NR	30-Aug-07	5-Sep-07		$21,660.00	
LOI003	Market Vision, Facts and Figures	LOI	12-Sep-07	NR	12-Sep-07	24-Sep-07		4,560.00 EUR	
	Sheep and Goat Judges	Consulting contract	NR	NR	NR	13-Jul-07	13-Jul-07		
	Dario Caccamisi Wavier	Consulting contract	25-Jul-07	9-Aug-07	8-Aug-07	BTV	BTV		
	Dragi Filipovski	Consulting contract	25-Jul-07	9-Aug-07	NR	15-Aug-07	11-Sep-07		

* CTO approval proceeded CTO approval and is internal to USAID.

3.0 OPERATIONAL PROBLEMS AND POLICY CONSTRAINTS ENCOUNTERED

3.1 LACK OF TRUST BETWEEN PRODUCERS, AND BETWEEN PRODUCERS AND PROCESSORS/MARKETERS

This lack of trust impacts the ability of producers to organize themselves into sustainable commercial entities such as Producer Organizations (PO). This also means that producers have very minimal bargaining power as compared to the larger buyers and processors. The transaction costs of marketers and processors' sourcing raw materials from producers is also high since no one producer has a significant amount of product to sell. It is difficult for marketers and processors to obtain specific varieties and specifications from producers, especially those that require somewhat different production practices since there is no PO for the processor/marketer to work with to efficiently transfer inputs or technology to individual producers.

This lack of trust and understanding of the potential benefits of POs is reflected in the fact that several donors, including FAO and SIDA/SFARM have tried to develop sustainable POs for several years with very minimal success.

Historically, producers have tended to default on contracts with processors/marketers if the fresh market price is higher than the contracted price or if another trader offers a somewhat better price or payment terms, especially cash. This tends to cause processors/marketers to go into their own production to get the specific varieties, specifications and delivery timing they require.

Processors tend to default on agreements if they are unable to sell sufficient finished product to justify the quantities they have contracted for, if there is less expensive raw material available from another source, or if a large enough percentage of the producer's output does not meet established specifications - which can also be flexible depending on supply versus demand considerations.

This prevalent mistrust among producers and between producers and processors/marketers makes it challenging for AgBiz to improve the competitiveness of out Tier One value chains since there is very limited interest in cooperation to do so at both the producer level and between producers and processors/marketers.

AgBiz will address this issue by helping selected processors/marketers identify good new market opportunities, especially in export markets, then work with them to arrange backward linkages with a limited range of producers wiling to produce to our customer's specifications. AgBiz may need to provide a type of default insurance to make sure agreements are conformed to.

3.2 CHALLENGES RECRUITING VERY SPECIALIZED STTA

The international consultant skill set required for many AgBiz projects is very specialized and requires EU-specific experience. Examples include an expert in marketing high value mushrooms to EU markets and an expert in e-sales of wine to EU markets. The ARD consultant data base usually does not include consultants with these very specific and EU-based skills, and the consultants with these skills and experience are not likely to be American. Therefore, an extensive European consultant search in is necessary. This requires time and is more expensive than normal consultant recruiting. The use of non-American international consultants also requires a nationality and payment in US dollars waiver from the Mission Director.

AgBiz is working with ARD to expand the EU consultant data base, and identify specialized EU publications and sources of specialized EU consultants. Therefore, while the ARD consultant data base does not currently include consultants with these precise value-chain, regionally-specific, and EU-based skills, and the consultants with these skills and experience are not likely to be American, we are quickly developing greater capacity for these requirements.

3.3 LACK OF CLARITY REGARDING TIMING AND SPECIFICS OF IPARD

Many potential AgBiz customers are eagerly waiting for the availability of IPARD competitiveness enhancement funds, and IPARD funds can be used to leverage AgBiz funding for some projects. However, the specifics regarding IPARD funding, and the availability timing of these funds is uncertain. AgBiz is very closely monitoring IPARD-related developments and will inform potential customers regarding our best estimate of timing and how to apply for IPARD support and, if needed, will train local consultants in how to help potential AgBiz customers apply for IPARD funding.

3.4 CURRENT BUDGET ALLOCATION VERSUS PROJECT SUPPORT NEEDS

The project roll out plan included a 60 day built in period for hiring of local staff to insure USAID involvement in screening of the candidates for the 6 key positions in the staffing. Now that this exercise has been completed, the AgBiz budget now has a clearer view of the how the project will be implemented after the start-up period. We now know for instance that based on the costs associated with the staffing and actual startup costs that several budget categories will need to be adjusted. However, until an adequate burn rate is established it would not be prudent to suggest a budget realignment. As a result, during at least the first six months of FY '08, we will be tracking fund expenditures against the annual budget, and will request a Budget Modification mid- FY '08 when the likely utilization of the budget is well understood. This means that while LoP budget line items are not likely to be exceeded in FY '08, the annual contract budget of some categories will be exceeded until a Budget Mod is approved.

3.5 DELAYED APPROVAL OF THE AGBIZ BRANDING AND MARKING PLANS

While AgBiz has already implemented nearly all parts of the Marking Strategy and is making plans to implement the Branding Strategy, we would be more comfortable in doing so if we had USAID approval or feedback on requested adjustments to out Branding and Marking Strategies submitted for approval several months ago.

4.0 ACTIVITIES PLANNED FOR THE FIRST FISCAL QUARTER

The following are activities AgBiz plans to implement during the First Fiscal Quarter of 2008, presented as the following detailed chart.

	Activity and Tasks	Team Leader	Team Members	Start Date	Status Review Date	Due Date
A	**Significantly increased value of sustainable sales by supported customers, with emphasis on exports of value adder agriculture based products**	CoP	All Technical	Oct. 1	Quarterly	Sep-31
A.1	**Solicit, Develop, Screen and Approve of Business Expansion Proposals**					
A.1.1	Publish an APS/RBP	CoP	F&A Mgr.	8 Oct.	12 Oct.	15 Oct.
A.1.1.a	APS draft approved by USAID	CoP				
A.1.1.b	APS mailed to BSPs	F&A Mgr.				
A.1.1.c	APS published in newspapers	F&A Mgr.				
A.1.1.d	First tranch of proposals screened and ranked					
A.1.2	Staff Solicitation of Proposals from Key Participants in Tier 1 and 2 Value Chains	CoP	All Technical	8 Oct.	Monthly	Ongoing
A.1.2.a	Processed Vegetables Value Chain	West	All Technical	15-Oct	Monthly	Ongoing
A.1.2.b	Fresh Vegetables Value Chain	Kokarev	All Technical	15-Oct	Monthly	Ongoing
A.1.2.c	Wild Gathered Products Value Chain	Starova	All Technical	15-Oct	Monthly	Ongoing
A.1.2 d	Bottled Wine Value Chain	Damovski	All Technical	15-Oct	Monthly	Ongoing
A.1.2 e	Table Grapes Value Chain	Ristevski	All Technical	15-Oct	Monthly	Ongoing
A.1.3	Utilize Local Consultants to Identify Proposals	CoP	All Technical	17 Oct.	1-Nov	15 Nov.
A.1.3.a	Hold Meeting to Discuss Use of Local Consultants	CoP	All Technical	25-Oct		
A.1.3.b	Provide Details on Use to Those that Request Same	CoP	All Technical	2-Nov		
A.1.3.c	Sign Agreements with Selected Consultants	CoP	All Technical	15-Nov		
A.1.4	Identify Commercial Possibilities from Other Donors	CoP	All Technical	19 Oct.		31 Oct.
A.1.4.a	Meet with SFARM	CoP		18-Oct		
A.1.4.b	Meet with SIPPO	CoP		24-Oct		
A.1.5	Use Relevant Associations to Identify Potential Customers	CoP	All Technical	22 Oct.	Monthly	31-Dec
A.1.5.a	Processed Vegetables Value Chain	West	All Technical	15-Oct	Monthly	31-Dec
A.1.5.b	Fresh Vegetables Value Chain	Kokarev	All Technical	15-Oct	Monthly	31-Dec
A.1.5.c	Wild Gathered Products Value Chain	Starova	All Technical	15-Oct	Monthly	31-Dec

	Activity and Tasks	Team Leader	Team Members	Start Date	Status Review Date	Due Date
A.1.5 d	Bottled Wine Value Chain	Damovski	All Technical	15-Oct	Monthly	31-Dec
A.1.5 e	Table Grapes Value Chain	Ristevski	All Technical	15-Oct	Monthly	31-Dec
A.1.6	Investigate Holding Value Chain Meetings	CoP	All Technical	29 Oct.		15 Nov.
A.1.6.a	Processed Vegetables Value Chain	West	All Technical	15-Oct	Monthly	15 Nov.
A.1.6.b	Fresh Vegetables Value Chain	Kokarev	All Technical	15-Oct	Monthly	15 Nov.
A.1.6.c	Wild Gathered Products Value Chain	Starova	All Technical	15-Oct	Monthly	15 Nov.
A.1.6 d	Bottled Wine Value Chain	Damovski	All Technical	15-Oct	Monthly	15 Nov.
A.1.6 e	Table Grapes Value Chain	Ristevski	All Technical	15-Oct	Monthly	15 Nov.
A.1.7	Local Meetings to Identify Potential Customers	CoP	All Technical	5 Nov.	Monthly	1 Dec.
A.1.7.a	Identify Most Viable Locations	CoP	All Technical	5 Nov.	Monthly	1 Dec.
A.1.7.b	Structure and Arrange Meetings	CoP	All Technical	5 Nov.	Monthly	1 Dec.
A.1.7.c	Meeting in Location A	DCoP	All Technical	5 Nov.	Monthly	1 Dec.
A.1.7.d	Meeting in Location B	DCoP	All Technical	5 Nov.	Monthly	1 Dec.
A.1.7.e	Meeting in Location C	DCoP	All Technical	5 Nov.	Monthly	1 Dec.
A.1.7.f	Meeting in Location D	DCoP	All Technical	5 Nov.	Monthly	1 Dec.
A.1.9	Identify Sources of Financing for Customers as Needed	Ristevski		1 Nov.	Ongoing	31-Dec
A.1.9.a	Complete Financial Guidebook	Ristevski		31-Oct		
A.1.9.b	Hold Guidebook Utilization Workshop	Ristevski		8-Nov		
A.1.9.c	Support Customers Applications for Credit	Ristevski		1-Nov	Ongoing	31-Dec
A.1.10	Assign Screened Proposals to Coordinators	CoP	West & Starova	After each proposal is passed into Assessment		
A.1.11	Identify and Prioritize Proposal Development-related Policy Constraints	Starova	All Technical	1 Oct.	Monthly	Ongoing
A.1.12	Develop Potential Customer Data Base	CoP	All Technical	5-Oct	19-Oct	31 Oct.
A.2	**Monitor the Successful Implementation of Approved Projects**					
A.2.1	Assign Project Coordinators	CoP	West & Starova	When Each Project is Approved		
A.2.2	Implement REVA System	CoP	West & Starova	1 Nov.	Monthly	Ongoing
A.2.2	Prepare Monthly Project Progress Reports	DCoP	PCs	1 Nov.	Monthly	Ongoing
A.2.4	Adjust Projects as Required	DCoP	West & Starova	As required		
A.2.5	Identify and Prioritize Project Implementation-related Policy Constraints	Starova	All Technical	1 Nov.	Monthly	Ongoing
B	**Increased Competitiveness of Tier One Value Chains**					
B.1	Training Needs Assessment	DCoP	All Technical	1 Nov.	1-Dec	31-Dec
B.2	Assess Potential for Association Development	DCoP	All Technical	1 Nov.	1-Dec	31-Dec

	Activity and Tasks	Team Leader	Team Members	Start Date	Status Review Date	Due Date
B.3	Assess the Potential for non-Project Producer Organization Development	DCoP	All Technical	1 Nov.	1-Dec	31-Dec
B.4	Investigate Competitiveness Enhancement Task Forces	CoP	All Technical	2-Nov	15-Nov	2 Dec.
B.5	Arrange Attendance at Selected Trade Fairs	West	All Technical	As approved		Ongoing
B.6	Investigate Activities Linked to EU Accession	CoP	All Technical	1-Nov	1-Dec	Ongoing
B.7	Investigate Value Chain Assessments	CoP	West & Starova	15 Jan.		15 Feb.
B.8	Support MAP Participation at ANUGA	West		13-Oct	15-Jan	15-Apr
B.9	Implement Market Assessments for Processed Vegetables	West	All Technical	29-Oct	15-Nov	1 Dec.
B.10	Implement Russian Market Development Activity	West		8 Oct.	20-Oct	29-Oct
C	**Properly Support Overall Program**					
C.1	Prepare Quarterly Reports	CoP	All Technical			31-Dec
C.2	Effectively Coordinate with Other USAID, Other Donor and GoM Projects	CoP	All Technical	Ongoin g		
C.3	Develop Regional Coordination Mechanisms	CoP	All Technical	22-Oct		15-Nov
C.4	Implement Effective Branding Program	CoP	CCSP	Ongoin g		
C.5	Install & Utilize an Effective MIS/M&E System	DCoP	CCSP	22 Oct.		15 Nov.
C.6	Upload and Update Website	CoP	F&A Mgr.	1 Oct.		31-Oct
C.7	Implement Environment Program	DCoP	CCSP	15 Oct.	Ongoing	
C.8	Alternative Sources of Agribusiness Finance Manual	Ristevski	Crimson	1 Oct.		30-Nov
C.9	Workshop on Use of the Finance Manual	Ristevski	Crimson	10 Dec.		
C.10	Hire Cross-Cutting Services Specialist (CCSP)	DCoP	CoP	5 Oct.		1 Dec.
C.11	Produce Success Stories	CoP	CCSP	1 Nov.	1-Dec	1-Jan
C.12	Coordinate Regional Competitiveness Enhancement Workshop	CoP	DCoP	1 Oct.	1-Nov	10-Dec
C.13	Make Decision on EU Accession STTA	CoP	DCoP	20-Oct	1-Nov	15 Nov.
C.14	Participate in USAID Macedonia Projects Coordination Meeting	CoP	DCoP	26-Oct	TBD	

The projected status of proposal development and project implementation at the end of the Quarter is highlighted in green in Table 4 below.

TABLE 4 - PROPOSAL DEVELOPMENT AND PROJECT IMPLEMENTATION CHART							
STATUS			Fiscal Year '08				
		Sep-07	Q1	Q2	Q3	Q4
Concept Papers/Proposals Received (CPs)	Projected		16	8	5	4
	Result	6				
CPs/Proposals Being Screened	Projected		2	2	1	1
	Result	1				
CPs/Proposals not Passed	Projected		10	5	3	2
	Result	0				
Proposals Being Assessed	Projected		1	1	1	0
	Result	1				
Proposals in Development	Projected		1	1	1	1
	Result	1				
Proposals Passed into Implementation	Projected Cumulative		3 5	1 6	1 7	1 8
	Result	3				
Projects Signed	Projected Cumulative		3 6	1 7	1 8	1 9
	Result	3				
Projects Completed	Projected Cumulative		0 1	1 2	1 3	1 4
	Result	1				
Projects Being Implemented (Signed - Closed)	Projected		5	5	5	5
	Result	2				
Proposals & Projects in the System (Screening + Assessment + Development + Waiting + Signed - Closed)	Projection		9	9	8	7
	Result	5				

5.0 FINANCIAL REPORT

ADMINISTRATIVE INFORMATION: CONTRACT EXPENDITURES
CONTRACT Nº. EDH-I-02-05-00006-00
Quarterly Report (September 30, 2007)

Category	Contract Budget	Incurred as of 6/30/07	Period Costs 7/1/07-9/30/07	Total Costs Accrued as of 9/30/07	Remaining
Personnel	$ **1,586,364**	$ 71,726	$ 90,126	$ 161,852	$ 1,514,638
Fringe Benefits	$ **464,618**	$ 25,821	$ 33,568	$ 59,389	$ 438,797
Travel and per diem	$ **350,988**	$ 24,136	$ 9,999	$ 34,135	$ 326,852
Allowances	$ **468,178**	$ 40,505	$ 28,009	$ 68,514	$ 427,673
Grants	$ **261,000**	$ -	-	-	$ 261,000
Subcontracts	$ **467,798**	$ -	$ 30,010	$ 30,010	$ 467,798
Activity Costs	$ **234,380**	-	$ 4,316	$ 4,316	
Equipment	$ **184,684**	$ 13,883	$ 4,445	$ 18,328	$ 170,801
Other Direct Costs	$ **232,153**	$ 9,982	$ 32,315	$ 42,297	$ 222,171
Indirect Costs	$ **1,024,195**	$ 54,781	$ 60,114	$ 114,895	$ 969,414
Sub-total	$ **5,274,358**	$ **240,834**	$ **292,902**	$ 533,736	$ **5,033,524**
Fee	$ **225,601**	$ 6,503	$ 7,907	$ 14,410	$ 219,098
TOTALS	$ 5,499,959	$ **247,337**	$ **300,809**	$ **548,146**	$ **5,252,622**

6.0 REPORTS PRODUCED DURING THE QUARTER

6.1 ANNOTATED BIBLIOGRAPHY

The Bibliography is a very large document since it is not only an organized listing of relevant reports and studies but also contains the Table of Contents and Executive Summary for most reports, as well as electronic versions of the full report/study when it is available electronically. Hard copies of all studies available in hard copy only are in the AgBiz library. The Bibliography is on the AgBiz shared drive for easy access by all staff, and will soon be accessible via the AgBiz website. The listing of reports and studies included in the Bibliography is included in Appendix 1.

6.2 VALUE CHAIN PRIORITIZATION WORK

This work was completed in a very interactive manner, i.e., with frequent interim reports in the form of matrixes and ongoing input from AgBiz staff as the products and value chains were narrowed down. The final prioritization was done with the participation of staff, the consultants and USAID so there is there is no final report as such. The final prioritization is shown in Table 1 above and a summary of the rationale for prioritizing the value chains is included herein as Appendix 2.

6.3 ROLE OF PRODUCER ORGANIZATIONS ASSESSMENT

The final report for this activity is still being converted into proper English, but it is 127 pages long and does not lend itself to be included in this Quarterly Report, even as an Appendix. However, the Executive Summary from the report is included herein as Appendix 3.

6.4 LESSONS LEARNED FROM THE LAND O'LAKES/SEAL OF QUALITY PROJECTS

A half day meeting was held with Land O'Lakes/seal of Quality staff to discuss Lessons Learned relevant to AgBiz and investigate the possibility of AgBiz taking over any Land O'Lakes projects or activities. No projects or activities for AgBiz to take over were identified that are consistent with AgBiz interests or objectives, although LOL was quite interested in AgBiz support for the testing laboratory established and owned by LOL until they could find new owners. The basic lessons learned relevant to AgBiz are shown in Appendix 4.

6.5 LESSONS LEARNED FROM LAMP

Six members of the AgBiz team traveled to Sarajevo for a two day session with LAMP managers. These sessions discussed which of the successful techniques and practices LAMP has implemented could be applied to AgBiz. These were very useful sessions for AgBiz staff.

The basic lessons learned from these sessions are instilled in each AgBiz manager, based on extensive input from their counterparts at LAMP. However, the basic lessons learned from these meetings are presented in Appendix 5.

6.6 FACTS AND FIGURES BROCHURE

AgBiz paid for the production and printing of the MAFWE Facts and Figures brochure distributed at the Agricultural Fair that started on 1 October. A copy of Facts and Figures is included in Appendix 6.

6.7 AGBIZ BROCHURE

AgBiz designed, received USAID approval for and produced its first brochure during the quarter. The brochure is available in a full color version and a two sided A4 size version. A copy of the brochure appears in Appendix 7.

6.8 RELEVANT TRADE FAIRS REPORT

AgBiz produced a detailed listing on most of the relevant agribusiness-related trade fairs that will take place in the next 12 months. The listing includes the name of the fair, the major products or items featured the location and the dates. The Trade Fairs Listing appears herein as Appendix 8.

APPENDICES

APPENDIX I – ANNOTATED BIBLIOGRAPHY DOCUMENTS LISTING

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
I	NATIONAL STRATEGIES, PROGRAMMES & REPORTS				
1.1	AGRICULTURE				
I.1.1	NPAA Strategy.doc	Government of the Republic of Macedonia	Government of the Republic of Macedonia	The document comprises the plans for harmonization of the national legislation with the EU legislation, the necessary dynamics of institution strengthening for implementation of the legislation, as well as the necessary resources for realization.	2007, April
I.1.2	Annual Ag. Report 2003.doc	Ministry of Agriculture	ASA Institute	2003 annual agricultural report – objectives, main principles, trends, agricultural policy outline	2006, Mar
I.1.3	Annual Ag. Report 2004.doc	Ministry of Agriculture	ASA Institute	2004 annual agricultural report – objectives, main principles, trends, agricultural policy outline	2006, Mar
I.1.4	Annual Ag. report 2005.doc	Ministry of Agriculture	Ministry of Agriculture	2005 annual report on Ministry of Agriculture's activities, state of agriculture, development of different sectors, future activities, EU integration	2006, Sep
I.1.5	NARDS strategy.doc	Ministry of Agriculture	Ministry of Agriculture	The National Agriculture and Rural Development Strategy presents an integral mid-term strategy for the period 2007 – 2013, and is developed according to the IPARD requirements	2007, June
I.1.6	Modified program for agricultural development 2006.doc	Ministry of Agriculture	Ministry of Agriculture	Program for amending and supplementing program for stimulating agricultural development in 2006	2006, month unknown
I.1.7	Ag. development Program 2007.doc	Ministry of Agriculture	Ministry of Agriculture	2007 program for stimulating agricultural development, showing budget amount, distribution of funds.	2007, month unknown
I.1.8	Strategy for approximation of Macedonian agro-food sector to CAP of EU.doc	Ministry of Agriculture	Ministry of Agriculture	Strategy for approximation of Macedonian agro-food sector to EU common agriculture policy (CAP)	2004, Nov
I.1.9	MAFWE Strategic paper	Ministry of Agriculture	Ministry of Agriculture	document presents the strategic goals for Macedonian agricultural sector development, as well as an overview of the agricultural and rural development sectors	2006, June
I.1.10	Macedonia Agriculture and EU Accession .doc	World Bank	World Bank	World Bank report on Macedonia's agriculture potential in light of EU integration efforts	2006, Nov
I.1.11	Macedonia-ASR-II draft Sept.03.doc	World Bank	Rapeepun Jaisaard, Garry Christensen, Garry Smith, David Gue, Aleksandar Nacev	To strengthen the ability of Macedonian agriculture to compete in the integrated regional markets of the European Union and south-eastern Europe through measures to increase the efficiency of agricultural production, processing and marketing, and to build appropriate, effective public and private institutions; to improve farm incomes; to ensure that consumers have access to safe, healthy food; to optimize the use of scarce land, forest and water resources in an environmentally sustainable manner; and to build viable rural communities through sustainable rural development.	2003, September
1.2	RURAL DEVELOPMENT				
I.2.1	IPARD Plan, July 2007.doc	Ministry of Agriculture	Ministry of Agriculture	2007 rural development program, showing budget amount, distribution of funds.	2007, month unknown

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
I.2.2	Report on implementation of RD program 2006.doc	Ministry of Agriculture	Ministry of Agriculture	Report on implementation of 2006 Rural Development Program	2006, month unknown
I.2.3	RD program 2007.doc	Ministry of Agriculture	Ministry of Agriculture	Outline of Agriculture Ministry's 2007 Rural Development Program	
I.2.4	RD program 2007 User guide.doc	Ministry of Agriculture	Ministry of Agriculture	Outline of Agriculture Ministry's 2007 Rural Development Program	2007, May
I.2.5	Program for revitalization of the villages 2006.doc	Ministry of Agriculture	Ministry of Agriculture	2006 program for village revitalization, showing budget amount, distribution of funds, purpose, criteria, terms and conditions.	2006, month unknown
I.2.6	Program for revitalization of villages 2007.doc	Ministry of Agriculture	Ministry of Agriculture	2007 program for village revitalization, showing budget amount, distribution of funds, purpose, criteria, terms and conditions.	2007, month unknown
I.2.7	M.K. Cohesion Project Final EA REPORT.doc	Ministry of Agriculture	Ministry of Agriculture	Environmental assessment report for Macedonia Agriculture and Rural Development Cohesion Project	2007, Apr
1.3	**OTHER**				
I.3.1	Establishment of national integrated phytosanitary service draft final report.doc	Ministry of Agriculture	Agriconsulting Europe SA	Establishment of National Integrated Phytosanitary Service (NIPS) in RM	July, 2006
I.3.2	Program 2006 for plant health.doc	Ministry of Agriculture	Ministry of Agriculture	2006 plant health program, adopted at cabinet meeting, showing budget amount, distribution of funds.	2006, Feb
I.3.3	Report state inspectorate on activities according seed law.doc	Ministry of Agriculture	Ministry of Agriculture	Report on State Agricultural Inspectorate's activities as part of enforcement of law on seeds and seedling for agricultural plants	2007, month unknown
I.3.4	Report state inspectorate first quarter 2007.doc	Ministry of Agriculture	Ministry of Agriculture	Report on state agricultural inspector's scope of work, activities Jan-Aug 2006	Unknown
I.3.5	World bank study 2006.doc	World Bank	World Bank	Project appraisal document on a proposed loan in the amount of EUR 15 million to FYROM for an agriculture strengthening and accession project	2007, May
I.3.6	Value chain analyses.doc	MAASP	Christian Sandberg	Value chain analyses in the Macedonian agricultural sector	2006, January
I.3.7	Value chain analyses in agricultural sector.doc	OPTO International AB/MAASP	OPTO International AB/MAASP	Analysis of sheep cheese, tomato and paprika, potato, wheat and milk sector.	N/A
II	**FOOD SAFETY AND QUALITY CONTROL**				
2.1	**FOOD SAFETY**				
II.1.1	Strengthening national food safety in SE Europe transition countries FAO 2005.doc	FAO	Dragan Angelovski	Regional Approach To Food Legislation And Control	2005, July
II.1.2	GFSI.doc	SIPPO	Todor Galev, Stanko Miric	Agro economic methods and models of operational research in agriculture	2003, month unknown

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
II.1.3	MCA General assessment of Macedonian dairy industry to meet EU food safety standards 2004.doc	MCA	M.V. Dr. Iliyan Kostov/Land O' Lakes	Report on outcome of two-month mission in Macedonia aimed at making general assessment of dairy industry's readiness to meet EU food safety standards	2004, Jun
2.2	**QUALITY CONTROL**				
II.2.1	EurepGap manual.doc	MAASP	CDS (Center for Business Cooperation)	EureGap Manual (Macedonian)	2006, January
II.2.2	Farmers Guide to EUREPGAP (hardcopy manual).doc	IFAD	Dragan Angelovski/FAGRI KOM	Farmers guide to EUREPGAP commercial standards, principles, goals, terms of use, etc.	2006, Aug
III	**AG FINANCE & TECHNICAL SUPPORT**				
3.1	**INTERNATIONAL PROJECTS**				
III.1.1	MAASP Annual Report 2006.doc	MAASP	MAASP	MAASP annual progress report covering period Apr 2005-Mar 2006	2006, Mar
III.1.2	Bi-annual progress report Apr-Sep 2005.doc	MAASP	MAASP	MAASP bi-annual report Apr-Sep 2005 covering situation analysis, program output and activities, lessons learned, opportunities, constraints, etc.	2005, Oct
III.1.3	Inception report 2005.doc	MAASP	MAASP	Final version: Overview, concept, work plan, main goals of Macedonian Agricultural Advisory Support Program (MAASP)	2005, Mar
III.1.4	Monitoring and evaluation report.doc	MAASP	MAASP	MAASP monitoring and evaluation report	2005, month unknown
III.1.5	Report of the initial MAASP baseline study of five pilot project areas.doc	MAASP	Monika Poposka	Report on the Initial MAASP Baseline Study of Five Pilot Project Areas	2007, month unknown
III.1.6	MAASP Brochures-manuals (hardcopy).doc	MAASP	MAASP	Hardcopy brochures/manuals outlining MAASP program, policy, activities, projects.	Unknown
III.1.7	2nd Annual Report SFARMII 02.03.2006 eng.doc	USAID	SFARM	2nd annual report on activities aimed at supporting Macedonian farmer's association from Jan-Dec 2005	2006, Mar
III.1.8	R. Macedonia IFAD M&E half year report 2005.doc	IFAD	IFAD	Appraisal of impact of IFAD 1 and IFAD 2 projects - micro credits and credits for primary production (half-year report Jan-Jun 2005)	2006, May
III.1.9	R. Macedonia IFAD M&E annual report 2005.doc	IFAD	IFAD	Appraisal of impact of IFAD 1 and IFAD 2 projects - micro credits and credits for rural trade and processing of agricultural products (annual report covering Year 2005)	2006, May
III.1.10	R. Macedonia IFAD M&E half year report 2006.doc	IFAD	IFAD	Appraisal of impact of IFAD 2 project - micro credits and credits for rural trade and processing of agricultural products (half-year report Jan-Jun 2006)	2006, Dec
III.1.11	R. Macedonia IFAD M&E annual report 2004.doc	IFAD	IFAD	Appraisal of impact of IFAD 2 project - micro credits and credits for rural trade and processing of agricultural products (annual report covering Year 2004)	2005, Jan
III.1.12	IFAD Video TS.doc	IFAD	IFAD	Short educational video clips (DVD) with agricultural, livestock raising advice (areas covered – livestock, wine, cheese) divided into seven chapters	Unknown

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
III.1.13	Final Report MCA Evaluation Project.14_12.doc	USAID	INOTEH Consulting	Evaluation report for Macedonian Competitiveness Activity	2005, Dec
III.1.14	MCA-1 final report.doc	USAID	Booz Allen Hamilton	Final report on results, outcome of Macedonian Competitiveness Activity project lasting from October 2002 through September 2006	2006, Dec
III.1.15	White Paper SOQ Case Study.doc	Land-O-Lakes	Land-O-Lakes	Developing premium products in meat and dairy processing industry and branding them with widely recognized and respected symbol of wholesome quality.	N/A
III.1.16	NoragricRep34.doc	Norges Vel	Noragric	Review of Norges Vel's agricultural projects in Kosovo and Macedonia 2002-2006	2006, Sep
3.2	**SME FINANCING**				
III.2.1	LoL Growing your Agribusiness.doc	Land-O-Lakes	Land-O-Lakes	To Increase Income and Employment in the fruit and vegetable sector.	2006
III.2.2					
3.3	**MICRO FINANCING**				
IV	**ADVISORY SERVICES**				
4.1	**ADVISORY SERVICES**				
IV.1.1	Structure of advisory packages.doc	MAASP	MAASP	Structure of advisory service packages and approach to national delivery of advisory services	2005, Dec
IV.1.2	Analysis of agricultural advisory materials.doc	MAASP	CDS (Center for Business Cooperation)	Analysis of printed agricultural advisory materials and evaluation of their comprehension by farmers	2005, October
IV.1.3	Comparison of education provision and employment needs.doc	MAASP	CDS (Center for Business Cooperation)	Comparison of education provision and education needs of public and private agricultural advisory services	2005, month unknown
IV.1.4	Farm business management training.doc	MAASP	Michael Hegarty, freelance consultant	Overview of farm business management training activities, outcome, manual samples	2006, Jan
IV.1.5	Financing models report.doc	MAASP	MAASP	Overview of MAASP financing models	2005, Jan
IV.1.6	Financing of advisory services.doc	MAASP	Peter Reinhart	Financing of advisory services – introduction of a voucher system in MAASP pilot project areas	2006, May
IV.1.7	Financing report.doc	MAASP	Richard H Pickering	Advisory services financing – introduction of a voucher system in MAASP pilot project areas	2006, Apr
IV.1.8	Evaluation of farm monitoring survey.doc	MAASP	Gabriela Micevska	Evaluation of farm monitoring survey information system	2005, month unknown

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
IV.1.9	Review of advisory institutions in five pilot municipalities.doc	MAASP	MCG	Research aimed at providing a review of existing institutions involved in providing advisory services to farmers in five pilot municipalities	2007, Feb
IV.1.10	Report on physical and human resource analysis of NEA.doc	MAASP	MCG	Report on NEA physical and human resource analysis	2007, Feb
IV.1.11	Validation study on farm monitoring system.doc	MAASP	Dragan Gjosevski	Validation study on Farm Monitoring System (FMS)	2006, January
IV.1.12	Delivery of advisory package.doc	MAASP	Richard H. Pickering	Outline of plan for delivery of MAASP advisory packages	2006, January
IV.1.13	Advisory packages –milk hygien-plumb protection -winter pruning.doc	MAASP	N/A	A group of documents developed for delivery for advisory services to farming communities in five pilot areas of the project	2005/2006
4.2	**CONTRACT FARMING, FARMERS' ORGANIZATIONS**				
IV.2.1	Legal form of farmer activities.doc	N/A	N/A	Macedonian version of the document: Legal form of farmer's activities in R. Macedonia. Establishment of registered entities and organized legal groups in agricultural sector in the Republic of Macedonia.	2006, June
IV.2.2					
V	**CROP PRODUCTION**				
5.1	**FRESH VEGETABLES**				
V.1.a)	Sector analysis on key agricultural products, fruit and vegetables 2007doc.	European Commission, EuropeAid Co-Operations Office	Dario Salvatore Caccamisi, Horticultural Specialist in association with the local Horticultural Specialists Ms. Gordana Popsimonova and Mr. Saso Risteski	This document is elaborating fruit and vegetables situation in Macedonia, production, processing industry, market and trade, quality standards, past and current situation.	2007, March
V.1.b)	FRESHFEL Fruit and vegetables production trade and consumption monitor in EU 25 SIPPO.doc	SIPPO			2005
V.1.c)	The fruit and vegetable market in Switzerland SIPPO 2006.doc	SIPPO	Walter P. Unternahrer	Overview of fruit and vegetables market in Switzerland.	2006, April
V.1.d)	Opportunities in Macedonian greenhouse sector.doc	SFARM	N/A	Discussion draft – Greenhouse sector overview	N/A
V.1.e)	Fruit & Veg. Evaluation.doc	USAID	Will Cain, ARD, Inc	Evaluation of fruit and vegetable production, yields	2007, June
5.1.1	***Peppers, cucumbers and tomatoes***				

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
5.1.1.1	Brochure Vegetables Thermotherapy of infected seed.doc	GTZ	Мр. Владимир Стојановски, Инж. Агр. Слаѓан Митиќ	Instructions on proper use of thermotherapy on infected tomato and pepper seeds, soil disinfection	2003, month unknown
5.1.1.2	Brochure Improved health, productivity and quality of pepper and tomato in Pelagonia region.doc	GTZ	Rade Rusevski, Slobodan Bandzo	Manners of improvement of the quality of the paprika and effects to be achieved	2004, month unknown
5.1.1.3	Brochure Vegetable production .doc	GTZ	Martinovski	Importance of fresh vegetables in nutrition and trade, sorting, packaging, transportation and storage, marketing principles	Unknown
5.1.1.4	Production of virus free of kurtovska kapija variety.doc	GTZ	Slobodan Bandzo, Rade Rusevski	More important viral diseases in peppers	2003, month unknown
5.1.1.5	pepper subsector.doc	SFARM	Policy and Strategy Analyses Unit	Overview of pepper production, domestic consumption, export import, trade concession, forms of organization and activities of the pepper producers.	2005, June
5.1.1.6	tomato subsector.doc	SFARM	Policy and Strategy Analyses Unit	Overview of Macedonia tomatoes production, domestic consumption, export import, trade concession, forms of organization and activities of the tomato producers.	2005, June
5.1.1.7	Pre FS for greenhouse production of tomato in Strumica.doc	Land-O-Lakes	Stewart Guenther, Starboard Ventures LLC	Overview of greenhouse tomato production in Strumica.	2006, June
5.1.2	***Melons, cauliflower, broccoli, garlic and marrow***				
5.1.3	***Other***				
V.1.3.1	potato subsector.doc	SFARM	Policy and Strategy Analyses Unit	Overview of Macedonia potato production, domestic consumption, export import, trade concession, forms of organization and activities of the potato producers.	2005, June
V.1.3.2	Onion sub-sector overview.doc	SFARM	SFARM	Macedonian version – Onion production, export import trade concession and SWOT analysis.	N/A
V.1.3.3	Asparagus sub-sector overview.doc	SFARM	Elena Lukaroska	Macedonian version – Asparagus production, export import trade concession and SWOT analysis.	2006, February
5.2	**FRUITS**				
V.2.a)	Brosura Grafting.doc	IFAD	Petar Hristov	Здравствено исправен калем – успешен лозов насад (overview of vine grafting procedures)	2005, Jun
V.2.b)	Good grafting practices (hardcopy manual).doc	IFAD	Petar Hristov	Instructions for making healthy vine grafts	2005, Jun
5.2.1	***Strawberries***				
V.2.1.1	Strawberries sub-sector overview.doc	SFARM	SFARM	Macedonian version – Strawberries production, export import trade concession and SWOT analysis.	N/A

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
V.2.1.2	Pre FS for greenhouse production of strawberries 2007.doc	Land-O-Lakes	Plan.Net Consulting	Macedonian greenhouse and strawberry sector overview.	2007, February
5.2.2	***Table grapes***				
5.2.3	***Sour cherries, peaches and plums***				
V.2.3.1	plums sub-sector.doc	SFARM	Policy and Strategy Analyses Unit	Main indicator of the plums sector is presented in this document, production of plums, domestic consumption, export import of plums and SWOT analysis.	2005, June
V.2.3.2	sour cherries sub-sector.doc	SFARM	Policy and Strategy Analyses Unit	This document comprises production of cherries and sour cherries, domestic consumption, export import trade concession and SWOT analysis.	2005, June
V.2.3.3.	peach sub-sector.doc	SFARM	Policy and Strategy Analyses Unit	Overview of peach production, domestic consumption, export import, trade concession, forms of organization and activities of the peaches producers.	2005, June
5.2.4	***Other***				
V.2.4.1	apple sub-sector.doc	SFARM	Policy and Strategy Analyses Unit	This document comprises production of apples, domestic consumption, export import trade concession and SWOT analysis.	2005, June
V.2.4.2	SIP FRUIT NAXPORT.doc	IFAD	Facility for Farmers' Access to Markets (FFAM)	Strategic investment program designed to help Kavadarci fruit sub-sector supply chain achieve its defined improved market access strategies	2005, Jul
5.3	**CEREALS**				
V.3.1	Barley sub-sector.doc	SFARM	Policy and Strategy Analyses Unit	This document is elaborating production of Barley in Macedonia, prices, trade and export import trade concession.	2005, September
V.3.2	Maize sub-sector.doc	SFARM	Policy and Strategy Analyses Unit	This document is elaborating production of Maze in	2005, June
V.3.3	Rice sub-sector overview.doc	SFARM	SFARM	Macedonian version – Rice production, export import trade concession and SWOT analysis.	N/A
V.3.4	wheat subsector.doc	SFARM	Policy and Strategy Analyses Unit	This document comprises wheat production in Macedonia, trade concessions for wheat, EU trade concessions.	2005, September
5.4	**INDUSTRIAL CROPS**				
V.4.1	Sunflower sub-sector overview.doc	SFARM	SFARM	Macedonian version – Sun flower production, export import trade concession and SWOT analysis.	N/A
5.5	**CULTIVATED LEGUMES**				
V.5.1	Alfa-Alfa sub-sector overview.doc	SFARM	SFARM	Macedonian version – Alfalfa production, export import trade concession and SWOT analysis.	N/A

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
V.5.2	Legumes sub-sector analysis.doc	SFARM	Elena Lukaroska	Macedonian version – Production of bean, legume and pea.	2006, January
VI	**LIVESTOCK**				
6.1	**CATTLE**				
VI.1.a)	Brochure Cattle Silage and hay production .doc	GTZ	Боне Палашевски, Зоран Налетовски, Гоце Цилев	Концепт на производство на добиточна храна, предности и недостатоци на силажата, биотехнички карактеристики и фактори кои влијаат на силажата (livestock food production concepts)	2003, month unknown
VI.1.b)	Cattle Cows nutrition .doc	GTZ	Сречко Ѓорѓиевски	Processes for feeding milk-producing cows	Unknown
VI.1.c)	Animal nutrition and animal housing.doc	MAASP	MAASP	Report on animal nutrition and animal housing, based on field visits to individual dairy cow farms aimed at improving animal nutrition and housing conditions	2006, September
VI.1.d)	Brosura Livestock marking.doc	IFAD	Vanja Kondratenko/Veterinary Administration	Обележување на животни (Branding animals – overview of animal branding procedures)	2005, Sep
VI.1.e)	Brosura Legal procedures for livestock purchase.doc	IFAD	Toni Kirandziski/Veterinary Administration	Законски процедури при промет со животни (Legal procedures for animal trade)	2005, Jul
6.1.1	***Dairy***				
VI.1.1.1	Sector analysis on key agricultural products, milk 2007.doc	N/A	Thomas Brandt	This document is elaborating dairy situation in Macedonia, dairy industry, dairy farming, dairy processing, level of dairy farming quality, government policy for the sector, EU standards for health, hygiene, food safety at farm and processing level and future development.	2007, February
VI.1.1.2	Milk sub-sector overview.doc	SFARM	Policy and Strategy Analyses Unit	The document comprises milk and dairy product, consumption of product, export-import as well as export requirement.	2005, September
VI.1.1.3	SIP DAIRY Buljmeti.doc	IFAD	Facility for Farmers' Access to Markets (FFAM)	Strategic investment program designed to help Kicevo (Zajas region) sheep sub-sector supply chain achieve its defined improved market access strategies	2005, Jun
VI.1.1.4	SIP DAIRY BISTRA Agro Holland.doc	IFAD	Facility for Farmers' Access to Markets (FFAM)	Strategic investment program designed to help Kicevo supply chain achieve its defined improved market access strategies	2005, Aug
VI.1.1.5	Manual for hygiene and cow milking (hardcopy manual).doc	IFAD	Mome Davidovski, Tase Cvetkov, Igor Nikolov	Cow hygiene maintenance and cow milking technology manual	2005, Nov
VI.1.1.6	MCA feta and kashaval cheese export study 2003.doc	USAID	MCA	Feta and Kaskaval cheese export study	2003, December
VI.1.1.7	Stratum Research 2005.doc	Land-O-Lakes	Stratum Research	Consumer panel research covering 500 households across Macedonia to establish daily purchases of various consumer goods for home use	2005, second quarter

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
VI.1.1.8	Stratum Research 2006.doc	Land-O-Lakes	Stratum Research	Consumer panel research covering 500 households across Macedonia to establish daily dairy, meat product consumption and purchases	2006, June
6.2.1	***Meat***				
VI 1.2.1	Beef subsector.doc	SFARM	Policy and Strategy Analyses Unit	Report on situation in Macedonian beef sector in 2005, beef meat production, domestic consumption, EU trade concession and export requirements.	2005, September
6.2	**SHEEP**				
VI.2.a)	Overview of sheep cheese and lamb meat market in Macedonia.doc	MAASP	Saso Ristevski/MCG	Overview of sheep cheese and lamb meat market in Macedonia	2006, February
VI.2.b)	Good hygiene practice on sheep farm (hardcopy manual).doc	IFAD	Dragi Gjorgjievski	Instructions for good hygienic practices at sheep farms	2007, May
VI.2.c)	Business Plan Lamb Cheese Cluster 2006.doc	MCA	Unknown	Lamb & Cheese Cluster business plan	2006, Oct
VI.2.d)	Lamb Cheese Baseline statistics 2002-2003Report.doc	MCA	MBRC-TI.Net/MCA	Market survey "Baseline Statistics 2002 & 2003 for Lamb & Cheese Sector	2004, Jun
VI.2.e)	Practical Sheep farming (DVD).doc	Land-O-Lakes	Land-O-Lakes	Flyers, brochures, presentations containing practical advise for sheep farmers	2007, month unknown
6.2.1	***Cheese***				
VI.2.1.2	SIP SHEEP SERTA.doc	IFAD	Facility for Farmers' Access to Markets (FFAM)	Strategic investment program designed to help Ovce Pole sheep sub-sector supply chain achieve its defined improved market access strategies	2005, Jun
6.2.2	***Lamb***				
VI.2.2.1	Sector analysis on key agricultural products, meat 2007.doc	N/A	Clive Bonnet	This document is elaborating past and current situation in sheep/lamb sector in Macedonia, meat processing sector and slaughtering, poultry meat sector, market and consumer trends and IPARD investment areas for the development of the meat industry sector in Macedonia.	2007, February
VI.2.2.2	sheep subsector.doc	SFARM	Policy and Strategy Analyses Unit	This document is elaborating sheep meat production in Macedonia, domestic consumption, market for sheep products and export requirements.	2005, September
VI.2.2.3	MCA Lamb test market to Greece final report 2006.doc	USAID	John D. Willsie, marketing consultant	Report on most effective methodologies to help sheep breeders in Macedonia improve economic opportunities, stability	2006, April
VI.2.2.4	Spring lamb export study report 2003.doc	USAID	MCA	Spring lamb export study	2003, December
VI.2.2.5	Greek Lamb Test Market (LTM) Sub-Project Report-SFARM Report.doc	MCA	SFARM	Report on Greek lamb test market sub-project	2006, May

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
6.3	**PIGS**				
VI.3.1	Pork sub-sector overview.doc	SFARM	SFARM	Macedonian version – Pork meat production, export import trade concession and SWOT analysis.	2005, February
6.4	**POULTRY**				
VI.4.1	poultry subsector.doc	SFARM	Policy and Strategy Analyses Unit	This document comprise poultry sub sector in Macedonia, domestic consumption of poultry meat, supplying of poultry meat and eggs, EU trade concession.	2005, September
6.4.1	***Eggs***				
6.4.2	***Broilers***				
6.5	**BEES & HONEY**				
VI.5.1	Brochure beekeeping honey .doc	GTZ	Unknown	White sugar and metabolism and the benefits of honey	Unknown
VI.5.2	Improved bee keeping technology.doc	GTZ	Aleksandar Uzunov	Selection and technology for breeding queen bees; marketing of bee products	Unknown
VI.5.3	Honey subsector.doc	SFARM	Policy and Strategy Analyses Unit	The document comprises the development of bee keeping, honey production, domestic consumption and price.	2005, September
VII	**HERBS, FLOWERS AND FOREST PRODUCTS**				
7.1	**CULTIVATED**				
7.2	**WILD MUSHROOMS AND WILD BERRIES**				
VII.2.1	Medicinal and aromatic plants manual and monography.doc	SIPPO	Ministry of Agriculture	Manual and monographs for collectors of aromatic and medicinal plants according to the principles of organic production	2004, month unknown
VIII	**ORGANIC PRODUCTION**				
8.1	**POLICY & LEGISLATION**				
VIII.1.1	Organic development program 2007.doc	Ministry of Agriculture	Ministry of Agriculture	2007 program for stimulating and developing organic agricultural production, showing budget amount, distribution of funds.	2007, month unknown
VIII.1.2	Overview on organic certified in 2005.doc	Ministry of Agriculture	Ministry of Agriculture	List of certified organic producers in 2005	2006, Dec
VIII.1.3	Overview on organic production in 2005.doc	Ministry of Agriculture	Ministry of Agriculture	Overview of organic agricultural production in Macedonia in 2005	2006, Apr
8.2	**ORGANIC PRODUCTION TECHNOLOGY**				
VIII.2.1	Brochure Organic Regional and Inter-ethnic WS Struga.doc	GTZ	Ranko Tadic	Introducing regulations and standards in organic farming	2007, month unknown
IX	**POST-HARVEST TECHNOLOGIES**				
9.1	**GRADING AND STORAGE**				
9.2	**TRANSPORT**				

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
X	**FORESTRY AND PASTURES**				
10.1	**FORESTRY**				
10.2	**PASTURES**				
XI	**IRRIGATION**				
11.1	**OPEN FIELD**				
11.2	**GREENHOUSE**				
XI.2.1	Combined irrigation and fertilization in horticultural production (hardcopy manual).doc	IFAD	Ordan Cukaliev, Ilija Iljovski, Vjekoslav Tanaskovic	Use of combined fertilization and irrigation techniques in vegetable production and automation potentials	2007, Mar
XII	**AGRICULTURE MECHANIZATION**				
XIII	**AGRICULTURE INPUTS SUPPLY**				
13.1	**SUPPLIERS**				
13.2	**INPUTS**				
XIV	**PROCESSED PRODUCTS**				
14.1	**FRUITS AND VEGETABLES**				
XIV.1.1	Final Report FVPI.doc	Macedonian Association of Processors	Saso Risteski, Macedonian Consulting Group (MCG)	Research and analyses the production figures and export performances of the fruit and vegetables processing industry; Compile and analyze information related to the number of full-time employees and seasonal labor engaged by the industry; and Sublime the findings and develop conclusions into a comprehensive report.	2007
XIV.1.2	Market analyses of dried vegetables and fruit.doc	GTZ	Unknown	Methodology and application of the process of production within the countries, Marketing of dried fruits and vegetables, including case studies	Unknown
XIV.1.3	SIP VEGETABLE Univerzal-Promet.doc	IFAD	Facility for Farmers' Access to Markets (FFAM)	Strategic investment program designed to help Kocani region vegetable sub-sector supply chain achieve its defined improved market access strategies	2005, Aug
XIV.1.4	SIP VEGETABLE Mabi Trade.doc	IFAD	Facility for Farmers' Access to Markets (FFAM)	Strategic investment program designed to help Strumica region vegetable sub-sector supply chain achieve its defined improved market access strategies	2005, Jun
XIV.1.5	SIP VEGETABLE AGROVA.doc	IFAD	Facility for Farmers' Access to Markets (FFAM)	Strategic investment program designed to help Veles vegetable sub-sector supply chain achieve its defined improved market access strategies	2005, Jul
XIV.1.6	Brosura Fruit and vegetable processing industry.doc	IFAD	Strategic investment program designed to help Strumica region vegetable sub-sector supply chain achieve its defined improved	2005, Jun	2005, May

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
			market access strategies		
XIV.1.7	MS-Macedonia presentation 06-01-07.doc	Land-O-Lakes	Marv Shelby	Update on freezing technology for food and vegetable processors in Macedonia (PPT presentation)	2007, June
14.2	**HEALTH FOOD**				
14.3	**BAKERY**				
14.4	**WINE**				
XIV.4.1	Sector analysis on key agricultural products, grapes and wine 2007.doc	European Commission, EuropeAid Co-Operations Office	Frederic Julia	This document is elaborating grape and wine situation in Macedonia, production, processing industry, market, trend, quality standards and SWOT analysis.	2007, May
XIV.4.2	Aspects of the Swiss wine market.doc	SIPPO	Vinedis	This presentation provides and overview on the Swiss wine production, domestic market consumption, imports, trade structure as well as recommended websites as suitable sources of information	2005
XIV.4.3	German wine market SIPPO 2006.doc	SIPPO	Jörg Sievers	Power point presentation for German wine market.	2006, March
XIV.4.4	Wine retailing in the UK market SIPPO 2006.doc	SIPPO	N/A	Overview of UK wine market, retailers, consumers, country shares and leading brands.	2006, February
XIV.4.5	SIP Wine.doc	IFAD	Facility for Farmers' Access to Markets (FFAM)	Strategic investment program designed to help Tikves region wine sub-sector supply chains achieve their defined improved market access strategies	2005, Jun
XIV.4.6	Brosura wine law and EU trade regime.doc	IFAD	Marija Gjoseva Kovacevic, Trajce Andreevski	Нов закон за вино и промени во трговските односи со ЕУ (new law on wine and changes in trade relations with EU)	2005, Apr
XIV.4.7	8th November 2004 final SIAL 2004 report.doc	MCA	Anthony Dalgleish, Cluster Agribusiness Consultant with key inputs (and attached reports) from MCA Competitiveness Advisors Iva Orceva, Wine, & Agim Salja	Report on MCA's Wine and Cheese Cluster participation at Paris global food trade fair SIAL in Paris in 2004	2004, November
XIV.4.8	Macedonia Report David Stevens 2006 .doc	MCA	David Stevens, Senior Consultant of Davon International	Summary of visit to Macedonian wineries and vineyards in spring 2006	2006, May
XIV.4.9	Macedonia Report David Stevens 2005 .doc	MCA	David Stevens, Senior Consultant of Davon International	David Stevens, Senior Consultant of Davon International	2005

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
XIV.4.10	MacedonianWineCluster_FINALREPORT_050506.doc	MCA	Harvard Business School	Overview of Macedonian Wine Cluster	2006, May
XIV.4.11	Macedonia report David Stevens-2004.doc	MCA	David Stevens, Senior Consultant of Davon International	Summary of visit to Macedonian wineries and vineyards during 2004 harvest season	2004, November
XIV.4.12	MCA Macedonia Export Wine marketing assignment.doc	MCA	MCA/ ARD (Anthony Dalgleish)	MCA Macedonian export wine marketing assignment	2005, February
XIV.4.13	MCA project summary for wine cluster report by Michael Brennan.doc	MCA	Michael Brennan	MCA project summary for wine cluster	2004, December
XIV.4.14	The Macedonian Fine Wine Export Group Assignment report SIAL participation 2005.doc	MCA	Anthony Dalgleish	Summary of UK export launch strategy for Macedonian fine wines exports	2005, June
XIV.4.15	John Bree-IESC Final Report-July,2004.doc	MCA	John L. Bree	Final report on consultant's one-month tour of Macedonian wineries aimed at offering advice on improving agricultural practices	2004, August
XIV.4.16	Final Macedonian Wine Sector Scott Dixon Version 1.doc	Land-O-Lakes	William Scott and Graham Dixon	Consultants' report on evaluation of Macedonian wine cluster planning process and activities	2004, May
XIV.4.17	Macedonia Wine Laboratory final .doc	Land-O-Lakes	Graham Dixon	Macedonia wine laboratory feasibility study—preliminary draft	2005, February
XV				**STATISTICS**	
XVI				**OTHER**	
XVI.1	Survey of attitudes to agricultural advice in Macedonia.doc	MAASP	MAASP	Survey of attitudes to agricultural advice in Macedonia	2007, Feb
XVI.2	Attitude changes of the rural stakeholders.doc	MAASP	Dr. Sreten Andonov	Report on results of workshops on establishing degree of attitude change of rural stakeholders in pilot municipalities	2006, June
XVI.3	Gender awareness and participatory decision-making.doc	MAASP	CDS (Center for Business Cooperation)	Report on outcome of series of workshops on gender sensitization in the agricultural sector	2006, June
XVI.4	Sectoral EIA guidelines.doc	MAASP	Menka Spirovska	Environmental Impact Assessment guidelines for assessing impact of certain projects on living environment	2006, month unknown
XVI.5	Survey on awareness and training needs related to WTO, SAA and FTAs.doc	MAASP	MCG	Survey on awareness and training needs related to WTO, SAA and FTAs	2007, Feb
XVI.6	Applied methods and models of operational research in agriculture.doc	GTZ	Todor Galev, Stanko Miric	Agroeconomic methods and models of operational research in agriculture	2003, month unknown
XVI.7	Brochure Marketing principles .doc	GTZ	GTZ on behalf of BMZ Cvetinovski	What is marketing, consumer and market analysis, elements of the marketing mix	Unknown

	BIBLIOGRAPHY	SOURCE	AUTHOR	PRIMARY SUBJECT MATTER	YEAR & MONTH PREPARED
XVI.8	Procedures and documents for export of agricultural products.doc	GTZ	Stopanska Komora na Makedonija	Export of agricultural products	Unknown
XVI.9	Comparative Analysis of agricultural support program in Macedonia and competing countries.doc	GTZ	Unknown	Comparative analysis of agricultural support programs in Macedonia and competing countries.	2003, month unknown
XVI.10	BWMP Analysis for Macedonia tomato, pepper and apple subsectors.doc	GTZ	CECI – Canada	Overall objectives and methodology for the development of the tomato/paprika and apple sub sector/Assessment study	2003, Mar
XVI.11	Macedonian Export Directory (LOL).doc	SIPPO	SIPPO	DVD/Web site containing information about Macedonian fresh & processed fruits and vegetables, mushrooms, herbs and oils exports, directory of exporting companies, facts about Macedonia, export statistics, etc	Unknown
XVI.12	Brosura Utilization of state-owned land.doc	IFAD	Ministry of Agriculture	Користење на земјоделско земјиште во сопственост на државата (use of state-owned arable land)	2005, Jun
XVI.13	Avian flu (hardcopy manual).doc	IFAD	Toni Kirandziski, Dragoslav Kocevski, Zarko Karadzovski	Avian flu preparedness, policy, preventive measures, etc.	2005, Dec
XVI.14	Epi Centre Research Reports.doc	USAID	EPI Centre	Market research reports on fruit and vegetable production, sheep and goat products, broilers, bee keeping, village tourism	2006, Jun
XVI.15	Executive summaries cluster development and standards improvement 2003.doc	USAID	Trajkovski & Partners Consulting/MCA	Executive summaries of D1, D2, and D5 as part of Cluster Development and Standards Improvement project	2003, Nov

APPRNDIX 2 – VALUE CHAIN PRIORITIZATION RATIONALE SUMMARY

TIER ONE VALUE CHAINS SCORING AND RATIONALE						
CRITERIA VALUE CHAIN	FRESH TOMATOES, PEPPERS, CUCUMBERS & OTHER SIGNIFICANT VEGETABLES		PROCESSED VEGETABLES - ESPECIALLY CONTAINING PEPPERS		GATHERED, WILD FOOD PRODUCTS - MOSTLY MUSHROOMS & WILD BERRIES	
	RATIONALE	SCORE	RATIONALE	SCORE	RATIONALE	SCORE
Export Markets Size & Growth Potential	There is a trend in the last years of converting from corn and wheat to pepper production. Therefore there is big potential for export to the EU especially Germany for specific varieties of pepper.	9	All of the vegetable processing companies are export oriented and do not consider the domestic market as a significant market for their production. Talking in numbers 90% to 95% of the production of all processors is exported. The general conclusion for the sector indicates that the main export markets are the EU (Germany, Slovenia, Romania, Austria etc.) markets which account for about 45% to 50%, and the regional markets with about the same size. The volume of exports to regional markets varies. Some are exporting more to Croatia, other to Serbia, Kosovo etc. The other export markets account for about 5% to 10% of the production capacity for the processors.	7	The major export market destination of these products is the European market or the regional markets. The buyers of the NTFP are usually buying in bulk and branding the production as own products. The regional markets which are buying out the material collected are re-exporting. In recent years the herbs are much more demanded on the EU market in comparison to the mushrooms.	6
Current Compliance with the Export Market Requirements	The level of compliance is high and the exported fresh pepper satisfies the market requirements. The Macedonian pepper is recognized brand with high quality especially on the regional markets. Out of season production is competitive on the regional markets especially because of favorable weather conditions that are allowing Macedonian product to appear on the Market earlier than the local production.	7	The companies comply with the main export market demands regarding the product that they are exporting. The requirements are on a higher level by the EU markets, while the requirements for the regional markets are lower. This involves the basic requirements of sorting the product by size, quality etc. for fresh as well as for the processed - conserved products such as roasted peppers etc. EU markets have good potential and demand more sophisticated products in small packages, and suppliers that meet safety and quality standards such as HACCP and ISO. The regional markets on the other hand are not as demanding however, certification of origin, good quality is demanded and it the good marketing and relations are inevitable with the supermarket chains on the export markets. In the export markets where there is a higher importation from different exporters there is higher competition and of course the standards and requirements are higher.	7	The product has recognized quality on the targeted markets. Each market has specific demands on the processing level and manner of processing (dried, frozen, fresh etc) which also varies from product to product (mushrooms, herbs and berries). Generally for all products the quality has to be high, fresh, ecological and in adequate/enough quantity. This incorporates the calibration/sorting of the product by quality, size etc. The HACCP standards are not obligatory for export to the EU or the regional market. The domestic larger companies which have the production for exports are in accordance with the demands of the EU and regional markets.	7

TIER ONE VALUE CHAINS SCORING AND RATIONALE						
CRITERIA VALUE CHAIN	FRESH TOMATOES, PEPPERS, CUCUMBERS & OTHER SIGNIFICANT VEGETABLES		PROCESSED VEGETABLES - ESPECIALLY CONTAINING PEPPERS		GATHERED, WILD FOOD PRODUCTS - MOSTLY MUSHROOMS & WILD BERRIES	
	RATIONALE	SCORE	RATIONALE	SCORE	RATIONALE	SCORE
Ease of Export Procedures	The export procedure requirements are standard and not too rigorous. However the bureaucracy is in a high level and sometimes irrelevant documentation which is not required by the importers are demanded by the domestic authorities. Considering the fact that we are talking about fresh product it is very important the custom procedures to be reduced to minimum.	7	The export procedure requirements are standard and not too rigorous. However the bureaucracy is in a high level and sometimes irrelevant documentation which is not required by the importers are demanded by the domestic authorities.	7	The export procedures are overburdened with administrative documentation which is issued only in Skopje and re-issuing is required too often. The requirements include - radio active check, phyto-sanitary certificates etc.	7
Competitive Position	Macedonian fresh peppers are with better quality than the one demanded and with recognized quality on the regional market. Because of the warm climate this advantage is especially visible for out-of-season production that is with recognized quality and on the markets earlier than the regional competition. This regional advantage is not the same for the EU markets where there is strong competition.	6	Locally, none of the processors consider the others as competitors. On the contrary, the fact that some of the processors are small and can not take the advantage form economies of scale, also face the difficulties to pertain permanent and stable contacts with the export market partners. This results from the low production standardization, there is no available quantity required etc. some of the processors believe that with standardization of the recopies of some products such as ajvar, gjuvech can assist each other when one can not respond to the demanded quantities by the importing partner. The main competitors on the EU export markets are: Italy, Romania, Bulgaria, Turkey, Spain and China. Regional competition is less mainly from regional producers in Bulgaria, Romania, Turkey, and Croatia.	5	Both on the regional as well on the EU market the processors are facing the problem of insufficient quantity. This precondition puts them in a position to be less competitive than the others and to have inadequate barging power and promote their own branding.	7
Potential for Increased Demand for Raw Materials	Concurring new markets is precondition for further growth in this sector. In order to answer on the market needs it is necessary to invest in new seedlings and to provide new varieties of these products.	6	Relatively small possibilities for further increase of the demand. With further growth of the vegetable processing local capacities it could be expected that some movement could be done in this respect.	4	Assuming organization of good system and workable links between the collectors and processors the demand for this product could further grow	6
Potential to Increase the Value Added in Macedonia	Organization off increased out-of-season production and finding alternative methods for greenhouse heating (thermal waters, solar …).New varieties, appropriately packed.	4	There is potential to increase the value added in Macedonia thorough increases in and expansion of the proceed foods product range. This especially is concerning the sophisticated more processed final products which have for example cheese and olive oil in the contents. Mixed salads are also one of the proposed different products: ajvar, gjuvech etc. vegetable purees	5	The potential to increase the value added in Macedonia is through branding of the Macedonian NTFP, through being able to access the markets with higher significant quantities which will provided adequate bargaining power to the Macedonian producers to be able to package and export the product as their own products as Macedonian as opposed to the current situation when the products are mainly exported in bulk and exported.	7

TIER ONE VALUE CHAINS SCORING AND RATIONALE						
CRITERIA VALUE CHAIN	FRESH TOMATOES, PEPPERS, CUCUMBERS & OTHER SIGNIFICANT VEGETABLES		PROCESSED VEGETABLES - ESPECIALLY CONTAINING PEPPERS		GATHERED, WILD FOOD PRODUCTS - MOSTLY MUSHROOMS & WILD BERRIES	
	RATIONALE	SCORE	RATIONALE	SCORE	RATIONALE	SCORE
Current Imports	Insignificant imports	3	Insignificant imports	7	There are no imports of wild food products.	3
Potential to Increase Farm Gate Returns	The increase of the farm gate return can be achieved through: extension of the production period (out of session production), i.e. with enlarged plots and contracts which are kept between the processors and the farmers the production period can be extended for two months this will enable the farmers to avoid oversupply which occurs in one period. Additionally the production should be sorted, according to size and quality in accordance with the agreements. The farmers should be able to package, sort and calibrate their products by themselves which will increase the fresh product value and label it since by now only the buyers, traders are packaging and labeling the products.	7	The increase of the farm gate return can be achieved through enlarged plots and contracts which are kept between the processors and the farmers. Use of mechanization should be increased together with the pre-classification farmer capacity.	5	There is a potential to increase the farm gate return in more manners. The quantities that the nature offers are used in very small percentage. With proper training on how to collect the products without damaging the plants/mushrooms is one way. The collectors should collect the product according to the buyer's instructions and to classify the collected material. If the farmers take on activities for semi processing such as drying of the mushrooms and other semi final processing	5
Realistic Potential to Increase the Competitiveness of Macedonian Products	Problem connected with concurring new markets (EU). The competitiveness of the Macedonian fresh vegetables will be increased once the quantities are big enough to reach economy of scale. Packaging and branding are important for recognition.	6	The production capacities need to be modernized and improved. The equipment and the mechanization also need to be modernized and improved with introduction of modern production lines. Reduction of the custom tariffs for imports of inputs for the processing companies when there is no domestic production. Access to cheaper financing resources for working capital. Improvement of the packaging and labeling of the product. Marketing of the products as Macedonian products in order to improve the complete country's image for quality. Increase subsidies for the farmers in order to increase their plots, to specialize and to have reliable and long term contracts with the processors.	5	The competitiveness of the Macedonian NTFP product will be increased once the quantities of collected materials are increased. The collected material is well treated by the collectors. The producers unite to export together as brand which is packaged and not re-exported but it is a Macedonian high quality product. Investments in freezers coolers dryers of the products.	5
Current Significance to the Macedonian Economy/Potential for Broad-based Impact	Sector that is currently providing livelihood to big number of rural households. Recognized regional quality and objective potential for further growth.	6	In the country there are around 20.000 households in the sector. Out of these seasonal workers in the sector are around 3000, mostly for the post harvest activities. In the processing industry 2000 are employed and another 2000 as	7	The average number of employees in the country according to the interviewed processors ranges around 100-200 permanent employees in the processing industry and additional 500 seasonal workers. The number of collectors is unknown	5
Cost to Develop	Relatively low investment needed especially for increasing the off-session capacities and improved system of greenhouse production (reduced costs). The main challenges will be connected with concurring new markets	6	Sector that is requiring significant investments. Lots off resent investments and large number of small processors without real individual capacity for concurring new markets	4	Low investment costs for overall development of the sector. Problems identified in the organization of collector-processor links and relations.	8

TIER ONE VALUE CHAINS SCORING AND RATIONALE						
CRITERIA VALUE CHAIN	**FRESH TOMATOES, PEPPERS, CUCUMBERS & OTHER SIGNIFICANT VEGETABLES**		**PROCESSED VEGETABLES - ESPECIALLY CONTAINING PEPPERS**		**GATHERED, WILD FOOD PRODUCTS - MOSTLY MUSHROOMS & WILD BERRIES**	
	RATIONALE	**SCORE**	**RATIONALE**	**SCORE**	**RATIONALE**	**SCORE**
Ability to Leverage	Sector prioritized by the state and supported by many international programs. Large number of individual producers that have interest in cooperation	4	Lots of new investments and establishment of large number of small processing companies. Identified by the government as one of the future priority sectors.	6	Low capacity both from the collectors and from the processors for investments in the sector development. Interest presented in other organization currently active in this sector (e.g., EPICENTAR and SIPPO). Lack of governmental support	5
Level of Potential Customer Interest/Cooperation	Historical experience for cooperation with primary producers. Support needed for concurring other markets	5	Currently existing habit of mutual assistance and cooperation mainly due to small size and lack of competition on the local markets. Support is needed in several different segments that considering the small size will be essential of providing cooperation with the Project and sharing resources. Experience existing with other donor interventions	6	Among the companies that do operate in this sector there is high level and interest for cooperation. New sector that is requiring lots of activities for achieving significant growth. Lack of unity between the existing processors or traders that are in the same time with individual low operational and financial capacity.	7
Potential to Achieve a Positive Impact in Less than 4 Years	Considering the current trends, the quality of the product and the regional image of Macedonian production and good local technical knowledge (especially of the primary producers) there is a potential of significant impact in a short period. Biggest obstacles are connected with concurring new markets (especially EU) where lots need to be done.	5	In the past few years the vegetables processing sector developed individually without significant donor support. It is to expect that with adequate technical support this sector can be significantly improved in short period of time especially if the working capital issues are addressed.	6	There is a high potential for significant development, preconditioned with improved direct relations between the collectors and processors that will result in increasing the collected quantities of NTFP. Lots of issues connected with the legal framework of the sector and regulation of the relation between the government, processors and collectors that with adequate governmental support could be overcome.	6
Total Score		**81**		**81**		**84**
Excluding Exports		**58**		**60**		**64**

TIER TWO VALUE CHAIN				
SCORING AND RATIONALE				
CRITERIA VALUE CHAIN	BOTTLED WINE		TABLE GRAPES	
	RATIONALE	SCORE	RATIONALE	SCORE
Export Markets Size & Growth Potential	The wine producing industry has well established links with the export markets, especially the larger companies. The main markets vary among the companies. Some are more oriented towards the regional markets and strengthening their position there and other which have traditional relations with other markets also are present on the EU markets and other markets as well. Their export quantities as well as production are increasing the last three years with and average 5 % on annual basis. However, for their next three year plans, they are stating drastic increases of bottled wine production with percentages up to 80 percent.	7	The major markets for the Macedonian table grapes are the regional markets. These include Serbia, Croatia, Bosnia, Bulgaria and Albania. The EU markets are not accessible due to the fact that the Macedonian wines are considered as second class table grapes only because of the low quality of packaging of the table grapes. The EU market is targeted by some of the exporters as a potential new market however the issues with the packaging need to be solved. The border procedures do not help in the process of grapes exports.	4
Current Compliance with the Export Market Requirements	Macedonian wines on the markets are generally considered as cheap (low end) since the majority of exports is in bulk. The bottled wines are considered as medium priced wines with good quality. According to the larger producers of wine this is the case with their production since they offer standard and constant quality wine compared to the small ones which rarely possess this characteristics which damages the overall Macedonian wine image. The export market i.e. the consumers vary with their demands and preferences regarding the taste of the wines. The EU market prefers fruit flavored, sweat and red wines, the regional and domestic markets are still price sensitive rather than taste sensitive when it comes to wines. All of the interviewed producers stated that their wine corresponds almost perfectly to the market demand due to the fact that they adapt the product to the demands of the different markets when it comes to the premium and high quality bottled wine.	6	The main competitive advantage of Macedonian table grapes is their quality and the taste, and they are a recognized brand in regional markets i.e., ex-Yugoslavia countries. Tests done on the level of sugar and Ph in the grapes are confirming the superior quality of the Macedonian grapes. On the EU markets they are still not recognized as a brand and are facing serious competition from the traditional grape producers.	4
Ease of Export Procedures	The export procedures are not special burden for the export companies. However the lack of common branding of the Macedonian wines is disadvantage. The companies are facing more problems with the imports of glass packaging bottles and fees for registration for each importation and each time when a new bottle for wine is to be imported.	5	The export procedures are long especially when it comes to customs procedures. The problem is that grapes are highly perishable and Macedonian customs does not facilitate export procedures for perishable products.	7
Competitive Position	The domestic producers are competing on the domestic market in the range where they belong. The competition is based mostly on price. The regional competition is Serbia, Monte Negro. Bulgaria. The EU competitors are Italy, France, and Spain - the traditional wine producers. On the other markets the new world countries New Zealand, Chile, South Africa, and Argentina which are strengthening their positions on the EU market as well. The main competitive advantages of the competition are the access to larger markets, established relations, and good quality wines.	3	Competition in EU markets is Italy, Greece, and Spain. Their main advantages are sophisticated packaging and high quality product. In the region there are no significant competitors since the quality of the Macedonian table grapes is recognized by the market. Competitive position on the EU market will depend on the grape varieties that are requested by those markets and on developing a "Macedonian" brand that will market our products.	6
Potential for Increased Demand for Raw Materials	There is already high current production of wine. Big potential for changing the ratio between the bottled and bulk wine	4	Sorting the problems with the "Macedonian brand" and successful penetration on the EU markets will increase the demand for raw material.	6

TIER TWO VALUE CHAIN				
SCORING AND RATIONALE				
CRITERIA VALUE CHAIN	BOTTLED WINE		TABLE GRAPES	
	RATIONALE	SCORE	RATIONALE	SCORE
Potential to Increase the Value Added in Macedonia	The value of the product can be increased through common promotion and raising of the image of the wines of Macedonia on the export markets. To destroy the image of cheap and low quality bulk wines and to promote the high quality premium wines. This should be accomplished on a national base and the image should be created. The small wineries rarely have standardized quality of the product, and often are destroying the image of the other wineries. The packaging is expensive to import especially when the innovations in bottle aesthetics is limited and the costs are high with the customs taxes. The wineries also should invest in new wines with premium quality with higher prices for the export markets.	7	Through adequate selection/ classification of the grapes; appropriate packaging of the grapes; labeling of the grapes; entrance on the EU markets; storage facilities; introduction of new varieties requested on the EU market	4
Current Imports	All of the interviewed producers of wine do not state any competitors from the other markets as significant for the domestic market. The competition on the domestic market is among the wineries in the country. The companies on the Macedonian market are not facing any significant foreign competition which is very likely to increase once foreign wines enter the market and the imported wines are placed text to the domestic wines. According to one of the producers the subsidies and the accessibility of the market although it might be small can force new and stronger competition. The Bulgarian imports could potentially present a competition on the local markets however there are no significant quantities imported on the Macedonian market	3	There are no imports.	2
Potential to Increase Farm Gate Returns	Organization of the primary producers in cooperative is one of the ways for decreasing production costs and better negotiation position towards the wineries and traders; Increase of the exported quantity of bottled wine will enable the producers to pay more to the farmers; Governmental support for the farmers. The buy out of the wine grapes is organized in different manners from direct cooperation with farmers which are financially supported from the wineries, form associations or from larger producers with long tradition. The associations are considered as inactive and not a reliable entity to buy out from, at the same time the relations between the farmer and the wineries are not on an adequately high level. The farmers usually do not keep to the contracts and are trying to sell grapes from low and high classes with the highest possible price.	6	Establishment and full function of cooperatives through which the buy out will be organized, associations which will enable lobbying power on a national level, education of the producers for new production technologies which will reduce their costs drastically and new varieties which re more demanded by the buyers. The full functioning of the associations and the cooperatives will enable the farmers to buy cheaper input material, to organize in supplying machinery for common usage etc.	6
Realistic Potential to Increase the Competitiveness of Macedonian Products	The production of wine grape and the farmer - buyer relations should be improved from both sides. Cooperative and association organized buy out should also be encouraged especially approaching bigger wineries. The producers of wine should orient toward higher priced products, and promote each other on national level on all potential markets as high quality wine producer and finally selection between the low quality not controlled wineries and the high quality larger wines should be done.	3	In order to increase the competitiveness of the Macedonian table grapes first of all the primary producers should adapt the production in accordance to the modern technology and new varieties; The relations between the farmers and the buyers should be improved, contracts should be done in advance and kept by both sides; Introduction of the Macedonian table grapes on the EU markets. Building a brand of the Macedonian table grapes in the EU and provide high quality and sophisticated packaging which will put the grapes in the first quality range. Provision of a suitable covenantal stimulation system for the primary producers. Assisting the primary producers with grants for new vineyards from the government, provide enough planting material locally. Introduction of new table grapes varieties according to the EU market demand (Crimpson).	6

TIER TWO VALUE CHAIN				
SCORING AND RATIONALE				
CRITERIA VALUE CHAIN	BOTTLED WINE		TABLE GRAPES	
	RATIONALE	SCORE	RATIONALE	SCORE
Current Significance to the Macedonian Economy/Potential for Broad-based Impact	The interviewed producers state that there are 1000-1300 permanent employees in 54 wineries, however in the grape sector the stated number very from 6,000 to 30,000. This is confirming the figure received in the first phase of the assignment and is reinforcing the importance that this sector has for big number of Macedonian rural households.	7	Around 20.000 people actively involved in the primary production of grapes (including the wine grapes)	5
Cost to Develop	Expensive investments needed especially on the processing part and marketing-branding of Macedonian bottled wine that is requesting significant investments	2	Relatively low investments connected with sector development. Biggest costs associated with concurring new markets and branding programs.	6
Ability to Leverage	Sector rarely supported by other Projects or donors. Lack of government support	3	Lack of support from other organizations or donors. Small support from the government	4
Level of Potential Customer Interest/Cooperation	Large number of new companies with small potential but high requirements for their individual future development. Large interest for organizing a mutual approach especially in the area of "Macedonian wine" branding for different markets.	8	Existing interest but with small number of companies that are directly involved in the table grapes trading.	4
Potential to Achieve a Positive Impact in Less than 4 Years	There is potential to improve this sector in a relatively short timeframe with aggressive promotion of the Macedonian wines. This will require significant investments and time.	3	There is a large potential for improvement of this sector in a short period of time since the issues are not as numerous as in the other sectors. Small number of table grapes traders is one of the obstacles for this process. Concurring new markets for Macedonian table grapes and creation of a "Macedonian brand" will require significant investments and time.	3
Total Score		**67**		**67**
Excluding Exports		**49**		**52**

TIER THREE VALUE CHAIN						
SCORING AND RATIONALE						
CRITERIA VALUE CHAIN	BROILERS		DAIRY PRODUCTS		LAMB	
	RATIONALE	SCORE	RATIONALE	SCORE	RATIONALE	SCORE
Export Markets Size & Growth Potential	The Macedonian production of broilers is covering up to 5% of the domestic poultry consumption. The remaining is covered through imports of poultry which is frozen and with different quality. The only export of fresh broilers is done by Pilko who exports to Kosovo fresh broiler meat with small value of 20.000 Euro in 2006 and 30,000 Euro in 2007. Market proximity, proper quality, and good packaging are advantages for Macedonian broilers for the Kosovo market since there is currently no significant domestic production of broiler meat there.	1	Macedonia as county is facing problems and difficulties when considering the diary sector. The point is that Macedonia is not licensed for exporting diary products i.e. Macedonian diary producers do not posses EU export number. That is the first and the only reason why Macedonian dairy products are only present on the domestic market with just a small portion placed in the EX Yu countries (around 5 %). The exception is IMB, Bitola exporting bulk milk in Greece and cheese in USA.	1	The main export market for the Macedonian lamb is the EU market. More specifically Greece and Italy. The EU market consumes in average 80% of the production (Italy 40%-50% and Greece 30%-40%). Regional markets that import Macedonian lamb are Bosnia and Croatia, taking around 10% of total production. Out of the total production around 5%- 10% is consumed by the domestic market. The export value however is low since there is not enough quantity.	5
Current Compliance with the Export Market Requirements	There are no exports of broilers from Macedonia (insignificant amounts of fresh broilers to Kosovo market). The quality of the Macedonian fresh broiler could not be compared with the frozen import products (Slovenia, USA, Turkish or Chinese imports). The product is fresh, well packaged and standardized. This should be looked for the domestic market where the domestic fresh broiler production will always have an advantage compared with the competition (considering the characteristics of the product and relatively short shelf life)	1	There is insignificant export on Macedonian diary products. Macedonian diary products do not comply the EU market needs in terms of packaging, appropriate label and safety standard. Sweed milk has announced that their product will totally respond to the EU market demand as from the start it is produced according to EU safety and quality standards. The new investments in this sector are promising changing of the situation with the exports especially for the regional markets. Still lots to be done to satisfy the requirements on the target markets.	1	Product with recognized quality especially for the traditional lamb markets (Italy Greece). The requirements of the different markets vary. The differentiation is mainly on the basis of size of the lamb, weight, with or without the head and offal. The producers and slaughterhouses which are mainly the exporters are providing the product - slaughtered lamb in accordance to the market demands. For the EU it is usually without the head and offal while for the regional and domestic market with offal and head. The Italian market requests for lamb with the weight up to 9 kg while the weight for Greece is not an issue.	7
Ease of Export Procedures	Considering the specifics of the product and relative short shelf-life exporting the fresh broilers to other markets is logistically difficult operation. The situation with the regional borders and the administrative burdens connected with exporting agricultural products will limit the export of fresh broilers but in the same time will protect the domestic production from regional competition. The transportation and packaging of the broilers for Kosovo is not expensive and due to the proximity of the Kosovo market which so far has no domestic fresh poultry producers. The EU countries are not accessible for Macedonian broiler since Macedonia is not licensed/registered for export of broilers which poses obstacles if the companies attempt or want to export their product elsewhere.	1	To export on EU market is necessary to get EU export number in the future (only IMB posses one in the moment) even that is not guarantee for easy access to markets (case of exports to Greece).	1	The export procedures of the lamb meat are not burdensome, however the import procedures for livestock (sheep) are rigorous and with high custom tariffs and taxes which poses a huge problem when it comes to increasing the production which is one of the problems for increasing the export.	5

TIER THREE VALUE CHAIN						
SCORING AND RATIONALE						
CRITERIA VALUE CHAIN	BROILERS		DAIRY PRODUCTS		LAMB	
	RATIONALE	SCORE	RATIONALE	SCORE	RATIONALE	SCORE
Competitive Position	Considering the characteristics of the product and relatively short shelf-life the domestically produced fresh broiler will always posses competitive advantage towards the imported broilers (fresh or frozen). The imported products which are frozen and often defrosted and sold as fresh is the main competition for the domestic production, the frozen poultry from the importers are competitors and market leaders on the Macedonian market. Pilko and Gina are the larger domestic producers which are competitors on the domestic market.	3	On local level there are 4 big companies IMB-Bitola, Ideal Shipka-Bitola, Zdravje-Radovo, Buchen Kozjak-Kumanovo competing among each other. The new green field investment "Swed Milk", new strategic investments in "Buchen Kozjak" and potentially "IMB" will make the Macedonian production more competitive especially on the regional markets.	3	The Macedonian lamb is highly appreciated especially in the EU due to the quality of the product which is the main competitive advantage of the Macedonian lamb. The sales and packaging if any is prepared through the exporter slaughterhouses. There is no certification with HACCP or ISO requests however the slaughterhouses have these certificates which are an additional quality and safety insurance. The quantity exported is low and the demand is much higher than the available supply which does not provide permanent and stable relations with the export market partners.	7
Potential for Increased Demand for Raw Materials	Currently there are only 5-7% domestically produced broilers compared with the total consumption of broiler meat (frozen). Organizing marketing campaign that will promote the use of fresh broiler meat (towards frozen), organization of good production system and further decreasing the production costs could significantly increase the penetration on the local market.	5	This will directly depend from the regional markets reaction on expanded Macedonian production. Sector that is traditionally well protected by the local governments	3	Problems with organizing increased production of lamb (the flocks are gradually decreasing). Widely shared opinion that the EU markets (Greece and Italy) could easily accept higher production (double)	6
Potential to Increase the Value Added in Macedonia	The introduction of semi processed products from broilers is one opportunity for the broiler processors; these products are suitable for the domestic as well as the targeted markets. Organization of domestic production of one day old chicks. Organizing a system for cheaper imports of soy meal to Macedonia with which the production price will further decrease	7	There is a potential to increase the value added in Macedonia thorough diversification of the production array and offering high quality products. To pay attention on pasteurization of cheese and regular sanitation controls as well as producing more sophisticated products such as aromatized diary products, yogurt and sour cream milk.	5	There is potential to increase the added value of the lamb if the slaughtered lamb is confectioned. This will increase the value of the product and increase the duration of the shelf life of the lamb. Currently there are no facilities in the country for confectioning of the meat, but slaughterhouse Serta is planning investment in their area. Standardization of the product will increase the value of the product since the quality if good but there is not product standardization	1
Current Imports	The largest sources of imported of broilers are USA and Brazil. USA poultry import covers more than 55% of the total imports of both branded and un branded products. The other importing poultry comes from Slovenia, China, Turkey and France. Sorting the import procedures in terms of improving the quality of the imported frozen broilers will further protect the domestically produced broilers,	10	There is large potential to replace the import by introducing new variety products because the price will remain the same. To achieve that long-term plan and serious approach from the state focused toward providing subsidies, quality control and control of the working conditions is needed.	10	There are no lamb imports in the country, There are imports in the country of processed milk products	2

TIER THREE VALUE CHAIN						
SCORING AND RATIONALE						
CRITERIA VALUE CHAIN	BROILERS		DAIRY PRODUCTS		LAMB	
	RATIONALE	SCORE	RATIONALE	SCORE	RATIONALE	SCORE
Potential to Increase Farm Gate Returns	There is a potential to increase the farm gate return if the farmers are organized by the slaughterhouses and cooperate with the wholesalers. To be able to keep the contracts and the take an advantage of economies of scale. The technology and methods of growing the poultry also should be adequate and in accordance to the requirements of the buyer. Investing in bigger farms built according to standards could further decrease the production costs and increase the profits for the farmers	3	Can be increased if farmers attend trainings and if someone is prepared to educate the farmers directly and provide the direct link between the farmer and the buyer. In order to achieve higher productivity besides the education they need to be given land on concession for own production of feed, that will allow them to be able to produce 20 liters of milk and to have farms with at least 15 cows in order to break even.	5	The farm gate return will be increases if the producers are educated and trained in the process of growing sheep/lamb. Standardization will increase the value of the product. The minimum number of sheep for breaking even is 200. The lack of good quality Sheppard is an issue of the sector. The primary producers should improve the class of the produced lamb. Introduction of meat confection where the weight of the lamb will not be an issue.	3
Realistic Potential to Increase the Competitiveness of Macedonian Products	The competitiveness of the Macedonian broiler will be increased if an organization of a modern and well managed value chain takes place. In order for this to happen there is a need of an integrator with capacity, sufficient market knowledge and organization and quality assurance. Modernization of the slaughterhouses and continued practicing of HACCP and ISO standards is a must for increasing production and possible exports. Packaging, labeling and distribution continued to be well organized with well developed logistics by the integrator. Further spreading of the distribution network. Collaboration among the farmers and powerful association in the later stage is important to represent the rights of the farmers at the integrators	8	Considering the new investments in this sector is providing some optimism for the improved performance of the group. Can be increased in 2 years time if the value chain starts functioning and if small farmers do not have such a small barging power when compared to big diary producers. The contracts should be signed on shorter period of time not as now when IBM, Bitola force the farmers to sign contracts with 5 years validity.	5	Increase of the competitiveness of the product will be increased through standardization of the production; reduction of the import customs tax of livestock and input material such as feed will reduce the production price of the lambs; confectioning of the meat will add value to the product and the weight will not be a problem; year round production of lamb will increase the production and generate quantity increase will enable penetration of new markets which at these point is not feasible due to the limited quantities; governmental simulation system for the primary producer will stimulate the farmers to increase the herds; preparation of repro local centre;	2
Current Significance to the Macedonian Economy/Potential for Broad-based Impact	This sector, if developed properly, could have significant impact on the Macedonian economy in relatively short period with relatively small investments. According to the processor there are around 500 to 1000 employees (farmers whose major income sources is broiler growing) in this sector. Since the processor has the potential to increase the capacity in the there years for approximately 60%, new 20 permanent employees will be employed only at the processors.	1	The overall number of people engaged in this sector is around 1000 people for which this sector is presenting the main source of revenues. With expanding the markets and with the new investments in this sector this number will grow.	5	Currently there are 1000 slaughter house employees, another 6000 in primary production, other seasonal workers during a period of two months. Important sector with unclear future, depending directly from ability to increase the sheep population in the country	4
Cost to Develop	Relatively low investment compared with the potential financial impact. Basic infrastructure existing in the country. Identified need for investment in marketing and changing the consumer habits.	6	Relatively big investments needed for significant improvement in this sector. Problems connected with the primary production that will require significant costs for development.	4	High costs mainly associated with activities related to increasing the flock size.	4

TIER THREE VALUE CHAIN						
SCORING AND RATIONALE						
CRITERIA VALUE CHAIN	BROILERS		DAIRY PRODUCTS		LAMB	
	RATIONALE	SCORE	RATIONALE	SCORE	RATIONALE	SCORE
Ability to Leverage	Sector in the moment not supported by other organizations or donors. With some governmental support but recognized as one of the priority sectors for Macedonian agriculture.	5	The resent investments in this sector are providing big possibility for future cooperation between potential donor and private sector for overall development.	8	Sector traditionally supported by many donor funded projects but without some visible long-term results. Sector that is highly subsidized by the government and is one of the future priority sectors for the government	5
Level of Potential Customer Interest/Cooperation	Existing interest but with small number of companies active in this sector (PILKO GINA and Zito Vardar).	4	Considering the current problems with the primary production and low level of the milk quality it will be necessary to organize a good system of cooperative farms that will directly cooperate wit the newly established processing capacities. Traditionally this sector (IMB) had not shown interest in cooperation with Projects.	4	Traditionally bad cooperation with processing establishment. Lots of bad experience related to this sector and lots of obstacles connected with the sector players' perception for future sector development and potential cooperation with donor funded projects.	2
Potential to Achieve a Positive Impact in Less than 4 Years	Sector that in short period could make significant financial impact for the overall domestic economy. Investing in marketing of the fresh broiler meat consumption versus the frozen meat, will directly result in increased demand for this product on the local market. Organizing the local broiler production, further support to the integrators and reduction of the production costs are only few of the activities that could significantly improve the overall performance of the sector.	8	The current foreign investments will bring new perspectives and know-how in the sector, especially for penetration on new markets and thus increasing the exports. There is no need for high investment in this sector. Organization of coordination between the processors and cooperative farmers, improving the financial support are only some of the activities that could help for enhancing the value chain.	7	Biggest issues for the future development of this sector are connected with increasing the size of the herds and increasing the total sheep population in the country. It will be extremely difficult to expect that in 4 years significant improvements could happen in this sector. The past-year trends and experience with previous donor interventions are supporting this statement.	2
Total Score		**63**		**62**		**55**
Excluding Exports		**60**		**59**		**38**

APPENDIX 3 – EXECUTIVE SUMMARY FROM THE ROLE OF PRODUCER ORGANIZATIONS ASSESSMENT

Great attention has been and is still being paid by international donors and institutions to establishing, promoting and supporting agricultural value chains. Although in certain cases not enough focus was given to the subjects that are crucial to enable producers to compete regionally and globally, namely: concentration of output, standardization of output, and promotion of final output - a number of projects and programs had a good impact on Macedonian agriculture, e.g., SFARM, MCA, LTM, and MAASP.

Thirteen co-operatives were established by the SFARM Project, which also contributed to the establishment of 3 agricultural LLCs. The financial status of the new co-operatives varies from co-operative to co-operative, however, for some their financial viability is expected to deteriorate in the near future to the level of bankruptcy. The comparative quality of human resources is the major determinate of the success and self sustainability of any of these co-operatives.

Despite the efforts of these projects and programs, it is common opinion within the sector that Macedonian farmers are not well organized. Farmers have not yet developed a positive attitude toward grouping and associating. Although trust among farmers is a pre-requisite of sustainable producer grouping, farmers do not trust farmer associations yet. Inadequate human resources, limited dedication of people, exaggerated attention on personal relationships, exacerbation of the human factor and weak leadership are considered to be the major reasons for this attitude and lack of sustainability.

If we ask the question why most PO development efforts were less than successful, and few initiatives only had success in initial producer grouping, we may answer that the ineffective strategies of several programs, which did not sufficiently consider the three crucial steps above described (consolidation of production, standardization of products delivered and promotion of final outputs) is the key reason for the failure of these PO development programs. Indeed, we may observe examples of cooperatives where the consolidation of production is not complete or where this inadequate standardization of production primarily, owing to managerial and organizational constraints.

Despite the above constraints, we found an improved attitude of agricultural operators towards producer groupings, namely co-operatives. The co-operative configuration is seen by various opinion leaders as the best concept for improved POs. Furthermore, the support co-operatives gained or will gain from the MAWFE in the National Agricultural Policy and in IPARD Plan implementation, being considered eligible and in some measures preferred beneficiaries, should speed up their growth in the next future. This is of paramount importance if we consider that the actual functioning of most of the existing co-operatives is not yet adequate in terms of organization, marketing practices, and membership structure and management, key reasons for their minimal achievements to date.

Improving organization and consolidating production is therefore becoming a critical issue for Macedonian farmers along with marketing, as farmers currently do not have direct access to reliable information about business opportunities, price and market information, and adequate marketing channels, therefore sound price formation mechanisms. A major problem for Macedonia agriculture and Macedonian POs is the inconsistency of production, as farmers find it difficult to produce consistent and standardized output for customers. As an example, sensory quality of Macedonian agricultural products is often high, but hygienic quality is poor as HACCP standard is not widely implemented and the hygienic standard of raw material production is poor. We suggest developing product specialization through specialized cooperatives to better address such issue.

Obviously, attention should be given to the existing legal framework in the agricultural sector, which seems to be quite comprehensive, with a basic package of laws covering all major subjects related to agriculture, although some issues are still late in implementation. Nevertheless, based on the meetings we had, and our experience in the country, it seems that existing regulations concerning co-operative membership are acceptable, although little amendments that might be obtained through adequate PO regulation could help to make cooperatives stronger. The establishment and functioning of legally funded PO is quite new, and not a well known topic in Macedonia. Several projects started a long time ago developing POs, although with concepts sometimes not related to business entities, but focusing on NGOs and always not in line with the concept of a PO as it is now accepted in EU. Sound legislation about POs is still missing and needs strong consideration by both the Government and international donors to speed up the process of modernization of Macedonian agriculture in the context of the EU accession. It is our opinion that PO development must be clearly addressed by the MAFWE as related to existing EU regulations by quickly adopting and implementing clear regulations ruling the establishment, functioning and operation of POs. However, considering the complexity of agricultural legislation, a need exists for expert analysis of legislation regulating POs in Macedonia, evaluation of existing laws, notifying authorities about the weaknesses and offering suitable acceptable solutions.

Two co-operatives are reported to be doing particularly well: the wine grape co-operative in Negotino, which is active in inputs supply and marketing of wine grapes, and the sheep-breeders co-operative in Berovo, active in cheese production, operation of milling equipment for animal feed production, packaging of cheese, and input supplies. Both are recommended for possible assistance by AgBiz. We also recommend that AgBiz consider possible co-operation with the FFAM Programme by continuing its activities and, consistently with our strategic recommendations and the proposed methodology, assist the two value chains where POs are already established and functioning[1].

Using these good examples, and the new sensibility of farmers and other value chain participants toward a more rational use of public resources to support the agricultural sector, it seems clear that any AgBiz financial support should be directed to viable agricultural businesses, with particular attention to those which exceed a minimum size, possibly in line with those set up by the IPARD plan. It is our opinion that the implementation of IPARD Funds, which are managed and directed according to very selective criteria, will facilitate the quick development of such an understanding.

Regarding the strategies AgBiz should adopt in the next future as related to POs, an AgBiz strategy aimed at improving the competitiveness of selected value chains must help its customers determining the market requirements of final products, constantly reviewing those requirements and determining and implementing effective arrangements for communicating with the final customers. In this market-oriented approach, dedicated focus is given to minimum product standards directly linked to final customers' needs and requirements. This should be accomplished in the context of an effective "continual improvement" strategy adopted by value chain participants, and aimed at improving the level of confidence and trust within the chain, both among the participants at different stages (vertical integration) and among the participants involved at the same stage of the chain (horizontal integration). The implementation of adequate and shared minimal quality standards is the starting point for increasing the competitiveness of the selected value-chains. Since the organization and the efficient and effective functioning of all stages of the selected value chains will have a great impact on the competitiveness of these value-chains, a deliverable of this assessment is an answer to the question of whether the adoption of customer-related and competitiveness enhancement processes within the selected value chains should entail producers being organized into producer groups/organizations.

In general, farmers' organizations should constitute a central pillar of any long-term agricultural development strategy. POs must be organized on economic principles. Inclusion is characteristic in traditional groupings, where everyone is inherently a member just because they are a part of the local community. To stimulate rapid economic growth, we expect formal POs, such as the ones we recommend for Macedonia, to be more exclusive, i.e., membership organizations created by producers to provide important commercial services to members.

The best producer groups for AgBiz support in the selected value chains are commodity-based associations dominated by large farmers. Consistent with the AgBiz scope, we therefore recommend that focus be given to POs that are willing to put restrictions on membership, and concentrate on business-oriented membership rather than on open membership. Supported POs should target activities that members have chosen, and that the PO is capably of delivering effectively and efficiently.

As a preliminary conclusion about the methodology AgBiz will be using to sustainably increase the competitiveness of selected value chains, we recommend that the assistance provided by AgBiz aim at

[1] The Lamb Association in Kavadarci and the berry association, particularly raspberries in Krusevo and Kavadarci and blackberries in Skopje.

integrating the value chains around agreed customer-based processes by considering all stages of the selected value chains (primary production, processing, distribution, marketing), with specific attention to the organization of producers. Consistent with the interviews we had and our observations on the development of the Macedonian agricultural sector, we recommend that the cooperative model be considered as top priority in the development and/or strengthening of POs, and in AgBiz assistance.

Considering the advantages of and benefits of an AgBiz focus on PO development, and the AgBiz indicators, we recommend that AgBiz adopt a methodology of combining the two approaches identified by the two AgBiz Key-Questions.

In our opinion, the best AgBiz methodology should consider value chains with POs that have good potential for growth in terms of both final output competitiveness and producer organization/value chain efficiency. In other words, the AgBiz methodology should start with value chains (a) with good outputs and (b) where the development of POs is possible in a reasonable time, consistent with the AgBiz program duration. A holistic approach to the global value chain is recommended through the following key areas of activities: consolidation of production, standardization of products, issues related to value-added products and marketing. Within these broad areas of activity, we recommend that the assisted value chains - with AgBiz assistance - identify and manage the key processes and adopt a dedicated process approach. This approach would enable the assisted value chains to improve the effectiveness of the value chain performance, and enhance customer satisfaction by meeting final customer requirements.

AgBiz staffing should be designed consistent with the processes identified in the TA program. We recommend that AgBiz considers this minimum complement of staff: (a) a specialist in agricultural production; (b) a specialist in administration, business planning, auditing and legal issues; (c) a specialist in marketing of agricultural products; (d) a specialist in logistics and for support to other relevant processes. Should AgBiz program decide to give special focus to Option 2 (value chains with POs) and support POs, we may expect that a specific PO Unit (process 2 – Organization of producers) would need to be staffed with two technicians with experience in this subject.

APPENDIX 4 – LESSONS LEARNED FROM THE LAND O'LAKES SEAL OF QUALITY PROJECTS

1) Associations are not likely to be AgBiz customers, but can be used as a source for identifying potential customers.
2) Always use cost sharing to make sure there is a commitment from the beneficiary.
3) The biggest weakness of Macedonian agribusiness firms is marketing, and therefore that is where they need the most help.
4) There is very minimal market information available regarding fresh fruits and vegetables, especially regarding demand levels, product types, prices, etc. This is especially true for Balkan export markets.
5) There is very minimal value added that takes place in fresh vegetables marketing, i.e., little of no form change between the producer and the end buyer.
6) There is also very minimal consolidation of output by producers or producer organizations for sale to larger buyers further up the value chain, so farm gate buyers can take advantage of producers.
7) Fruit and vegetable processors have substantial excess capacity but can't get the raw material they need due to producer hesitation to fulfill contracts for a specific product at an agreed price.
8) Work primarily with larger firms that can make effective use of support and can afford to implement the assistance provided.
9) In some cases local collection entities can be developed where one producer buys and supplies inputs to his neighbors, consolidates output and markets larger quantities to buyers. An example is when a dairy processor supplies a milk cooler to a small group of dairy farmers.
10) Ownership of the Seal of Quality and the associated laboratory is still uncertain. The GoM does not have the capacity to certify laboratories. A possible project is to acquire an EU consultant to help the GoM develop criteria for certifying animal products testing laboratories.
11) The LOL business model involved a large staff providing direct technical assistance to producers, and to a lesser extent processors/marketers. Sustainability of both the receiving entity and the source of assistance were not important criteria, nor was building local capacity to provide the same services.
12) Sustainability of the LOL initiated and supported testing lab was and continues to be a major issue.
13) There is an ongoing need for training in Production Management, Marketing and Quality Control since some supported products were returned by Customs or Buyers.
14) To increase exports of dairy products, especially products made from sheep milk, more dairies must become certified, especially for exporting to EU countries.
15) The development of industry owned Quality Seals linked to specific minimum quality standards offers an incentive to improve the quality and marketability of products in a limited time frame. The introduction of the Seal of Quality in the Macedonian processed meat and milk industries in the late nineties increased awareness of food safety and quality among producers and consumers in Macedonia, and was a good interim tool to increase consumption of domestic products. As users of the seal grew, gained financial soundness and were able to invest more in quality assurance and promotion they were more inclined to invest in consolidating individual brands as opposed to common marketing tools such as the Seal of Quality. This is specifically valid for industries that are focused on the domestic market such are the processed milk and meat industries.

APPENDIX 5 – LESSONS LEARNED FROM LAMP

Financing

In general the LAMP uses three types of financing sources for their customers, and these are:

1. Grants;
2. Financing through Micro Credit Organizations (MCO); and
3. Development Credit Authority (DCA), that provides access to finance through commercial banks with whom LAMP has a special contract for giving a guarantee of 50% of outstanding loans disbursed to LAMP clients.

The characteristics for these three types of financing are:

1. The grant is disbursed through LAMP to a target group of agro producers and firms that do not have access to other sources of finance. The customer must bring proof that they have already been rejected by institutions that provide sources of finance. The reason for this rejection is important for making the grant decision. To receive a grant the customer must meet established conditions (already known buyers, business plan…), and post-grant monitoring is an important part of whole process.

2. LAMP has a contract for financing its clients with three MCOs: Prizma Partners, Eki and Mikrofin. The MCOs were selected based on past cooperation during previous USAID project Business Finance Program. LAMP approved grants to the MCOs, and the MCOs should disburse loans to LAMP customers, with special agreed conditions. The MCO receives a grant up to US$2,000,000 by LAMP. The grants are disbursed in four tranches, based on contingency of the contract. The MCOs should disburse 40% of the loans to customers that receive a loan for the first time, 25% to customers receiving a loan on a term that is longer than 2 years, and 15% to returnees. The interest rate should be lower then 9.9%. The MCOs developed three different loan products, depending on whether the producers are individuals or cooperatives and based on the loan amount. The amount determines the term of the loan. On monthly, quarterly and annual loans, LAMP receives a report including the number of new employees and sustained employment, percentage of disbursed loans in specific sectors. Representatives from Prizma MCO stated that at the beginning they were just interested in the LAMP capitalization grants, but later they saw the benefits of financing the agro sector, an area that is barely covered by commercial banks. Currently agro loans represent the biggest portion of their portfolio. In order to gain knowledge of the agro sector finance methodologies with all its characteristics and specifics, their loan officers received agro lending training by LAMP.

3. The third source of finance available to LAMP customers is commercial banks. USAID has a contract for implementing the Development Credit Authority (DCA) program with two local commercial banks Volksbank BiH DD and UNICREDIT ZAGREBAČKA BANKA DD. In order to provide better loan conditions for their customers and sometimes to reduce the risk for the banks for agro loans, USAID created a loan guarantee fund, that guarantees coverage of 50% of the outstanding portfolio of LAMP customers. DCA guarantees the portion of the collateral that the customer is not able to provide and at the same time it provides additional security to the bank. The objective is to reduce the number of rejected loans because of insufficient collateral. LAMP and the commercial banks participate with equal share in DCA Guarantee fund. All terms for collaboration and conditions for LAMP customer's loans are defined in contracts between LAMP and the commercial banks.

All conditions of the contracts connected with finance institutions providing sources of finance to LAMP clients are closely monitored by LAMP staff.

Export Development

Most LAMP efforts have been focused on import substitution rather then export of products to regional or international markets. The project has had a significant impact on additional revenue generation by linking primary producers to processors and traders.

Project activities in the MAP sector have resulted in increasing export quantities, but in bulk packaging, and not with particular adding value to products. LAMP has provided support to a honey producing cooperative to develop specialty honey products in a fancy wooden box for Katar, and have done a few small trial shipments through the Vega Fruit Company that had invested in a joint venture bottling company in Libya.

Sales promotions/campaigns:

LAMP has used the services of local marketing agencies to develop marketing and promotional activities for customers such as:

- Creating a campaign and sales strategy for switching sales of blackberry wine from supermarkets into pharmacies by communicating its medicinal characteristics; this resulted in increase sales.
- Supporting the apple growing cooperative Gorazde to develop branding and packing of apples in a carton for the Mercator retail chain's produce section.
- Organizing several sales promotions in the ski center Bjelasnica, near Sarajevo, to enhance sales and increase consumers' awareness of the cheese, wine, honey and other products produced by the cooperatives supported by the project.
- Tea & Bee festival – Held in the center square of Sarajevo for individual producers and cooperatives involved in the production of teas and honey, presenting and selling their products; this resulted in a presence of these products in some local stores.

Linking producers/cooperatives with processors/traders

- In 2006, due to foreign investment by an Austrian company (Kelly's) in a new potato processing plant, LAMP organized six cooperatives to be raw material suppliers. In 2006 they have delivered 2,000mt while the expectations for 2007 are 5,000mt. Inputs were provided by the company and LAMP engaged agricultural institute of farmers to do the extension.
- In the berries sub-sector, a LAMP initiative helped small-scale farmers consolidate and establish a more consistent and vital relationship with the company Klas, as well as some exporters to Serbia.

The project has also supported several trainings for increasing capacity of customers regarding Branding, In-store Merchandizing and Promotion, Product Packaging, Dairy Marketing etc.

Conclusion: Not many lessons learned related to export development, but significant success in linking producers, especially cooperatives, with domestic processors or supermarket chains.

After selection of the value chains to be supported by AgBiz, some similar actions for enhancing the visibility and presence of customers' products on the domestic market can be undertaken. AgBiz can use LAMP consultants proven to be skillful at certain training when/if the need for that training is identified. Gaining access to international sales data like the source LAMP has been using for the MAP sector can be very beneficial for AgBiz export support activities. LAMP's overall conclusion was that establishing strategic partnerships, particularly with EU buyers, is a time consuming process and requires long-term support and close collaboration with program customers.

Production Agriculture

USAID-LAMP cooperates with various government officials and agencies on selective basis as opportunities arise, the focus has shifted to building capacity of agricultural associations to take the lead role in efforts to improve the agricultural business environment. Specifically, USAID/LAMP is providing support to various associations to develop positions on issues important to their members, prepare policy papers, and undertake advocacy and lobbying activities.

Farmers are organizing themselves into cooperatives more intensively, since it is the only option to access to supermarkets. However, cooperatives often encounter difficulties with their member farmers because the farmers tend to be price takers and will forego sales through a cooperative if they can make a few cents more by selling directly to some other buyer.
USAID-LAMP established substantive cooperative relationships with other development resources in order to save money and time, gain local knowledge, and establish contacts. Business advisors are facilitating market linkages by actively promoting relationships between buyers and suppliers such as producers, producer associations/cooperatives, food processors, food retailers and consumers.

Cooperatives in BiH face a stiffer challenge to gain increased access to the supermarkets. In time, the supermarkets will begin to insist upon selected standards (grades and classes) for products, in which case the cooperatives/ producers need to adapt and move up the value chain to address such requirements.
Fortunately, many supermarkets expressed interest to purchase locally grown products, but this initiative is balanced by the supermarket's need to deal with consistent suppliers. Sadly, local producers are often constrained by outdated seed/seedling varieties which limit the season. This is exacerbated by the small plot sizes of many farmers and the limited fields under production. Financing constraints often negatively impact the producer's ability to introduce better packaging facilities and build more cold storage facilities. Given these limitations, producers/cooperatives could collaborate with each other to request government to update the seed/seedling lists, or to share the financing burden associated with better packaging or cold storage facilities that could be shared by multiple users. There is some evidence that producers/cooperatives are forming some collaborative efforts, however, there is a need for increased efforts in this area.

Meanwhile, many cooperatives in BiH are often financially weak, have few cold storage facilities, limited harvest season and poor management. This inhibits their ability to sell to the supermarket or through a wholesaler. In future, as cooperatives continue to strengthen, it is expected to supply a greater share of local products to the supermarkets

Type of organization:

1. Cooperatives profitable organization with status and legal entity
2. Associations –Non profitable organization

- BiH Cooperation law - They utilized German model of Cooperatives and Associations law and regulative

Needs of TA to cooperatives

- Build agricultural associations' capacity
- Business advisors and access to the markets trough agricultural associations
- Trough associations provide training for farmers on selected standards (grades and classes) for products.
- Producers/cooperatives could collaborate to have better access to financing information.

General and Administrative

The goal of the Linking Agricultural Markets to Producers Project (LAMP) is to increase the rate of economic growth in Bosnia-Herzegovina through expanded, environmentally sustainable production and sales of value-added agricultural products. In order to reach the goal all project activities, including market linkages, technical assistance, access to finance and agricultural policy enhancement have been mostly directed towards increased domestic sales and brand recognition.

Best Bosnian Export Potential as per LAMP:
- Medicinal and Aromatic plants
- Frozen Berries
- Potatoes

LAMP Regional Cooperation
- Croatia Extension service
- Serbia, labs and Agro Institutes
- Regional Competitiveness Council
- Regional Fairs, trainings etc.

Grants and Sub-contracts

Procedure: LAMP has a comprehensive Grant Procedures Manual as per USAID Requirements.
Issuing APS or RFPs: No APS or other public announcements were issued for awarding grants. LAMP local staff is everyday working with clients identifying the need for grants.
The amount for grants ranged between 3,000, 5,000 and 10, 000 USD.
Cost share: Clients cost share portion was up to 25%.
Purpose: Clients were issued grants mostly for equipment and supplies.
Implementation: After an approval has been given for a grant the vendor would issue an invoice that will have client's name on it, but LAMP will directly pay the vendor. To avoid USAID property transfer procedure the new asset was registered in the clients' books as a fixed asset.
Sub-contracts: Needs identified by local staff and directly negotiated with advertising agencies and business schools for providing services to clients;

M&I/MIS
LAMP has a comprehensive data base that generates reports per client and type of assistance. Functional/Department Managers are responsible for entering assistance specific data. The data base generates data per USAID Indicators and Objectives.

AgBiz found the data base useful and it will be adapted and adopted. The LAMP data base specialist will create a simplified version for AgBiz with more obvious connection of the entries to the AgBiz indicators and objectives. Mr. Teskeredzic will send a trial version to AgBiz. After tailoring he will travel to Skopje to install and train staff for entering data and generating reports from the data base.

Technical requirements: MS SQL Server License 2005, 15 MB disc space.

Grants and General

LAMP determined which sub-sectors/value chains to work with by allowing the regional offices to establish local priorities. Therefore, the main value chains supported varied based on regional production.

Specific types of support were based on the traditional TA, training, grants, access to financing and the development of beneficial policies.

Lessons Learned by LAMP staff regarding optimizing project impact included use of the customer data base that allowed managers to follow their customers' progress.

The products and customers that have been the most successful at increasing regional and EU exports seem to be the traditional and ethnic products and producers rather than the development of new product lines.

The regional cooperation LAMP has pursued was USAID driven rather than customer driven. This lead to talk shops without a clear purpose for the private sector customers.

LAMP Market Information System appears to be unsustainable and presently provides historical information that farmers cannot benefit from. A MIS that assumes farmers will find information about other markets and other buyer relationships useful are not beneficial. Contact details of buyers in target markets is of considerable interest. This enables the farmer themselves to establish a relationship with the buyer, and then sell.

LAMP's use of grants was discussed in detail. They stated that the use of an APS had been a very time consuming process and identification of individual businesses was the best approach. Following standard procedures in the grant making process allowed for a transparent system, without an APS. LAMP created a structure in their Grants Manual that allowed the USAID CTO veto power over most technical decisions. Therefore, the grants panel was perhaps an undemocratic institution.

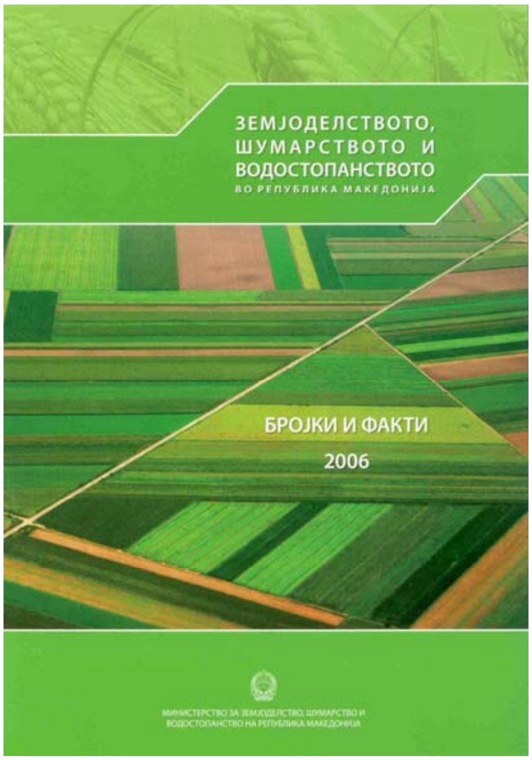
Infrastructure and machinery was given as part of a grant structure. Technical assistance went to individuals, companies and associations/groups, without leveraging in the first cases, and was often not part of the overall proposal for grants. Leverage percentage for grants was not clearly defined

Producer organizations were developed with some success. LAMP claimed success for the policy changes in the Bosnian cooperative law that made a major contribution to the development of commercial cooperatives and included a strict audit system. The only issue that was unusual to AgBiz staff was the legal requirement that a bankrupt cooperative move their assets to the geographically nearest viable cooperative.

LAMP staff saw opportunities for cooperation with AgBiz regarding the development of a regional MIS system, and perhaps cooperation on technical issue regarding specific Balkan crops.

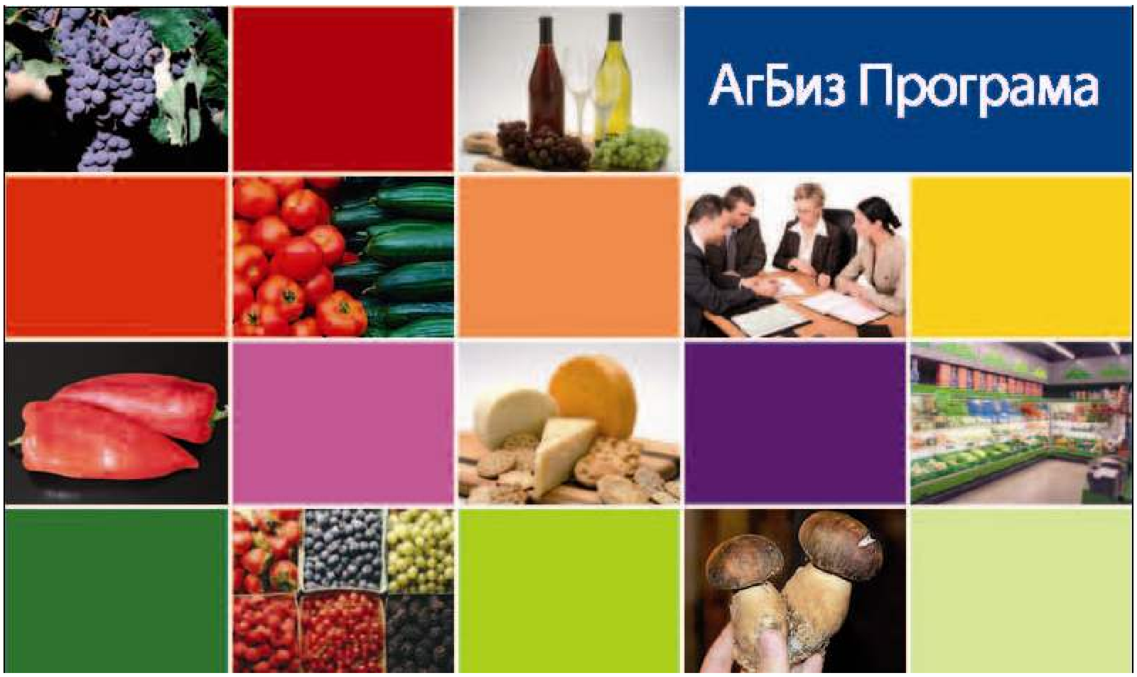
APPENDIX 6 – MAFWE FACTS AND FIGURES BROCHURE

Cover and back page of the brochure printed in English and Macedonian



APPENDIX 7 – AGBIZ PROGRAM BROCHURE

Cover page of the brochure issued in English, Macedonian and Albanian languages



APPRNDIX 8 – RELEVANT TRADE FAIRS LISTING

TRADE FAIR	DATE	HIGHLIGHTS	VENUE
Worldwide Food Expo	**24-OCT-07 to 27-OCT-07**	Worldwide Food Expo showcases all kinds of food processing and packaging machines, materials, systems and products under one roof. This is the unique opportunity to meet senior buyers & decision makers from all facets of the user industry.	McCormick Place, Chicago, Illinois, United States Of America.
International FoodTec China	**03-SEP-08 to 05-SEP-08**	International FoodTec China is a trade show dedicated only to the processing and packaging of food and beverages. A unique platform to explore real new business in the Chinese market will be established. This event will be able to cover the entire value chain: from manufacturing and processing to sales.	Shanghai New International Expo Centre, Shanghai, China.
SIAL Paris	**19-OCT-08 to 23-OCT-08**	SIAL Paris exhibit include National pavilions, beverages, dairy products, eggs, preserved food, food ingredients, delicatessen products, confectionery, biscuits and pastry, fresh and dried fruits and vegetables, grocery, diet and biological products and children's food, fresh poultry and game, fresh meats and tripe, deep frozen products, ice creams and frozen desserts, fresh seafood products.	Nord Villepinte, Paris, Ile-De-France, France
PLMA Trade Show	**22-MAY-08 to 23-MAY-08**	The Private Label Manufacturers Association's 2005 "World of Private Label" international trade show Among the features this year is a new "Idea Supermarket," which showcases private label products sold by leading retailers and wholesalers from Europe, the United States and other countries around the world. The show, which is held at the RAI Centre, includes more than 3,000 exhibition stands, representing manufacturers from 60 countries.	RAI Centre, Amsterdam, The Nederland
VIV Europe	**20-MAY-08 to 22-MAY-08**	VIV Europe is the leading event of its kind in the world. VIV Europe is the only international platform that unites all links in the supply chain. It is the place that showcases the latest solutions, trends and technologies in meat production and processing. It is a major opportunity to profile your company and present your products to an audience of 30,000 decision-makers from 125 countries.	Jaarbeurs Utrecht, Utrecht, The Netherlands
AGROVAK HOLLAND	**early DEC-08**	AgroVak Holland is the leading event for the professional agricultural industry. A biennial, national trade fair where importers, manufacturers and dealers in agricultural machinery and agricultural service providers showcase the latest developments in the industry. From agricultural equipment and cattle shed designs to milking techniques, from supplying arable farmers to the provision of financial services, AgroVak Holland has it all.	Brabanthallen Exhibition Centre in Den Bosch
Anuga	**13-OCT-07 to 17-OCT-07**	Anuga - the most important trade fair for the world of food & beverages. There are many food fairs. But only one can be the world's most important trade fair for food & beverages. And only one sets the agenda for the future: Anuga in Cologne.	Cologne Exhibition Center, Cologne, Nordrhein-Westfalen, Germany
International Green Week Berlin	**18-JAN-08 to 27-JAN-08**	International Green Week Berlin would provide exposure to farmers about the latest agri-input products, technologies, farming practices, government schemes, marketing and post harvest management.	Messe Berlin, Berlin, Germany
Fruit Logistica	**07-FEB-08 to 09-FEB-08**	Fruit Logistica provides industries involved in fruit trading an opportunity to present their range of services from growing to selling. One of the main attractions of FRUIT LOGISTICA is that it is a compact, highly effective show focusing on specific target groups.	Messe Berlin, Berlin, Germany
Forum Vini	**09-NOV-07 to 11-NOV-07**	Forum Vini is International wine fair for private customers and professional visitors, tasting and sales-show. At FORUM VINI in Munich high purchasing power, readiness to consume and expertise are readily available and wine is consequently being sold successfully.	MOC Events Center, Munich, Bayern, Germany.
Prowein	**16-MAR-08 to 18-MAR-08**	Prowein Fair is Germany's only truly international wine, beer & spirits exhibition. Prowein attracts a larger trade audience than any other event of its type in the German market. It attracts liquor buyers from across all market sectors including On-Premise, Off-Premise and hospitality buyers.	Dusseldorf, Exhibition Centre, Dusseldorf, Nordrhein-Westfalen, Germany.
Intercool	**28-SEP-08 to 01-OCT-08**	Intercool is an ideal place to do so, because its cross-over concept covers everything from the manufacture and processing of foods through to packaging, storage and distribution - with a process orientation and a cross-sector approach.	Dusseldorf Fairgrounds, Dusseldorf, Nordrhein-Westfalen, Germany.
World Food Market London	**21-NOV-07 to 22-NOV-07**	It combines The Ethnic & Specialty Food Exhibition, The Halal Exhibition and The Kosher Exhibition. These three events provide a service to the largest ethnic food market in Europe by bringing together many specialist buyers, suppliers, associations and community groups to do business.	Excel Exhibition Centre, London, England, United Kingdom.

TRADE FAIR	DATE	HIGHLIGHTS	VENUE
Wine+	**16-JAN-08 to 17-JAN-08**	Wine+ is a launch event for Wine buyers for On-trade establishments in London and the Home Counties can meet with wine suppliers to the On-trade. WINE+ delivers all the crucial elements buyers and sellers are seeking. It's an event which is entirely relevant to the On-trade, held in January when principal wine lists are being planned It adds value through relevant business focused events.	Olympia Exhibition Centre, London, England, United Kingdom.
World Food Ukraine	**30-OCT-07 to 02-NOV-07**	World Food Ukraine covers all sectors of the food and drink industry. It unites high quality trade buyers and other influential trade professionals with companies exhibiting independently or as part of regional or national group stands.	International Exhibition Center, Kiev, Kiev City, Ukraine.
Food Expo-Ukraine	**27-FEB-08 to 29-FEB-08**	Food Expo-Ukraine is the unique opportunity to meet senior buyers & decision makers from all facets of the user industry. It showcases all kinds of food processing and packaging machines, materials, systems and products under one roof.	Kiev Expo Plaza, Kiev, Kiev City, Ukraine
Cibus	**17-OCT-07 to 20-OCT-07**	Cibus provides a one-stop shop for its visitors who expect to see companies involved in food & drink technology, quality assurance, packaging, management systems, production and process engineering, retail solutions, purchasing, hygiene and food safety, laboratory equipment, food machinery, staff recruitment as well as research and development.	Fiere di Parma Fairgrounds, Parma, Emilia-Romagna, Italy.
Fiera Agricola	**07-FEB-08 to 10-FEB-08**	Fiera Agricola would provide exposure to farmers about the latest agri-input products, technologies, farming practices, government schemes, marketing and post harvest management.	Verona Exhibition Centre, Verona, Veneto, Italy.
So Fresh	**17-JAN-08 to 18-JAN-08**	So Fresh is a new event organized by Bologna Fiere for the food industry and specifically devoted to fresh foods: fruit and vegetables, meat and fish. So Fresh aims at promoting and making the added value of Made in Italy fresh foods known to national and international HO.RE.CA and retail community, in a targeted and effective way.	Bologna Fiere Spa, Bologna, Emilia-Romagna, Italy.
Vinitaly Expo	**03-APR-08 to 07-APR-08**	Vinitaly Expo is a prestigious exhibition of the world's best production, which enables all operators to make the trip around the wine world in five days in order to know, taste and enjoy high quality products of about 4,000 exhibitors.	Verona Exhibition Centre, Verona, Veneto, Italy.
TuttoFood	05-MAY-08 to 08-MAY-08	TUTTOFOOD is a strictly B2B trade fair, a privileged channel between the food industry and distribution in its various structures, from large surfaces to specialty shops. Companies, consortia, importers, buyers from large-scale distribution and retail therefore find TUTTOFOOD as a trade fair appointment able to represent the best products on offer in a complete professional way Italian and international food, covering not only the most traditional but also emerging consumer trends and new market segments, such as health foods, ready-to-eat meals, delicatessen and ethnic food.	Milano Fiera Milano, Italy
Agrialp	**09-NOV-07 to 12-NOV-07**	Agrialp is the more important Alpine Agricola Fair dell'Arco and an obligatory appointment for all operating of the agricultural field up Adige - the truths of all relief in the panorama local dell'economia. Retail Industry, Exporters, Agri Produce Traders, Processing Industry, Aggregators, Agri Cooperatives are the target visitors.	Fiera Bolzano, Bolzano, Trentino-Alto Adige, Italy.
Simei	**13-NOV-07 to 17-NOV-07**	Simei - biennial - is the largest strictly specialized exhibition, which presents at the same time all kind of machinery and equipment for oenology and for beverage production, bottling and packaging (wine, beer, mineral water, carbonated drinks, juices, spirits, brandies, alcohol, vinegar, cooking oil etc). The exhibition shows also all the equipment for drink packaging in the stages after bottling.	Fiera Milano, Milan, Lombardia, Italy.
World Wine Russia	**16-FEB-08 to 18-FEB-08**	First trade exhibition specifically designed for wine producers looking to introduce their ranges to this expanding export market. Wine Producers from around the world will participate - Importers, Exporters, Wholesalers, Wholesale distributors, Wine producers, Generic promotional bodies, Associations/Institutions.	Gostiny Dvor, Moscow, Moskva, Russia.
AgroProdMash	**15-OCT-07 to 19-OCT-07**	The Russian food-market is still one of the most dynamic and fast-growing markets in Eastern Europe. The demand for modern processing-and packaging-machines is constantly rising, this is also due to the strong support of the Russian state sponsor programs. The big food-enterprises in Russia are still handling all processes from raw material production, processing, production of food and packaging to marketing.	Expocentr' Krasnaya Presnya Fairgrounds, Moscow, Moskva, Russia.
IFE Fresh Produce	**23-OCT-07 to 25-OCT-07**	IFE Fresh Produce is Russia's first and only dedicated fresh produce trade fair, and will bring new ideas and new companies to a new market; the hallmark of the successful IFE shows.	Expocentr' Krasnaya Presnya Fairgrounds, Moscow, Russia.
Vinordic	**23-APR-08 to 26-APR-08**	A new lease on life, The first ever Vinordic-Trade Fair for Wines, Beers, Spirits & Ciders, which has taken over from the Mondial of Wines and Spirits at Stockholm International Fair	Stockholm International Fair Center, Stockholm,

TRADE FAIR	DATE	HIGHLIGHTS	VENUE
		Center. This first ever session met with success in many respects.	Sweden.
Stockholm Food & Beverage Fair	**09-NOV-07 to 11-NOV-07**	Stockholm Fair for Food & Beverage, the public trade fair focusing on home cooking and the domestic kitchen. Calling all foodies! Stockholm's International Fairs & Congress Center offers flavors from Scandinavia and beyond during the annual Food & Beverage Show. The exhibition ranges from raw products to ready-made food and drinks, kitchen equipment, literature and food exporting information. Last year 121 participating companies presented their products to some 24,000 hungry visitors.	Stockholm International Fair Center, Stockholm, Sweden.
AGROTICA	**06-FEB-08 to 10-FEB-08**	Exhibitors include manufacturers of Mini-tractors for gardening, soil softeners, lawn-mowers, watering equipment, hoses, saws, clippers, spades, rakes, wheelbarrows, nets, foils, greenhouses, Garden accessories, Awnings, Vases for plants and floral arrangements, Composts and fertilizers, Grass, Seeds for flowers and ornamental plants, Herbicides & insecticides.	Thessaloniki International Exhibition Centre Greece
International Agricultural Fair - Novi Sad	**12-MAY-08 to 19-MAY-08**	The leading agribusiness event in Southeast Europe that brings together all interested in Agricultural mechanization, field crops, vegetables, fruit, grapes, and related products, along with the food industry and a livestock exhibition - represent the core of what this exhibition covers together with the fields of industry that accompany agriculture.	Exhibition Centre, Novi Sad, SCG
BUDATRAN-SPACK	**02-OCT-07 to 05-OCT-07**	This major trade forum for packaging technology offers exhibitors an opportunity to achieve complex business aims by making their company's activity known, boosting their image, presenting new products and services, enabling new business contacts and fostering existing relations. It helps in international assessment also. The exhibition ensures interest from competent trade visitors with a high rate of corporate decision makers attending.	Budapest Fair Center, Budapest, Hungary.
MEATMANIA	**14-NOV-07 to 17-NOV-07**	Profile for exhibit includes Food Processing Machinery & Equipment: Assorted Food & Beverage Processing Equipment, Drink / Juice Processing Equipment, Food Sterilizing Machinery / Equipment, Bakery & Confectionery Equipment. Food & Beverages: Poultry / Meat / Halal Meat, Dairy Products, Chilled & Frozen Foods, Fresh Produce. Seafood: Fresh Seafood Products, Seafood Processing. Food Ingredients: Aromas, Flavors & Fragrances, Food Additives / Raw Material.	Inter Expo & Congress Center, Sofia, Bulgaria

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