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Survey on the Performance of the Fruit
and Vegetable Processing Industry 2007

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EXECUTIVE SUMMARY

The activity titled “Survey on Performances of Fruit and Vegetable Processing Industry 2007” is a result of joint cooperation between SIDA funded Macedonian Agricultural Advisory Support Program 2 (MAASP 2), USAID’s AgBiz Program and the Macedonian Association of Fruit and Vegetable Processors (MAP). Involved parties, understanding the need for having detailed information on the performance and impact of the processing industry in the country, agreed to collaborate and to initiate, design and execute the project that would particularly target those issues.

The survey encompassed 52 fruit and vegetable (F&V) processing capacities in the country, out of which only one company declined to participate and to provide the requested details. Another 7 companies could not complete the questionnaire due to the fact that they did not perform any processing activity in 2007 (due to various reasons, but mainly bankruptcy). Hence, the results and the analysis elaborated in this document are based on the answers obtained from 44 active F&V processing companies (unless otherwise stated). Due to the very high response rate, all the details stated in the report are relevant and statistically correct.

Most of the processing companies process both fruits and vegetables. Although combined processing (fruits and vegetables) is the most present in the processing capacities, it should be mentioned that in most of the cases fruit processing activity is rather symbolic. Around 90% from the overall production is vegetable processing, while only 10% is fruit processing activity.

In relation to the type of processing, the largest portion of the processors are involved in canning (27), small number of them are drying (2) and freezing capacities (6), while the rest of them have combined production lines (9).

Red pepper is the most important raw material for the processing industry. According to the survey, the quantities of red pepper purchased by the processing capacities in 2007 represented 50% of the overall raw material volume

The production output in 2006 was 14,8 thousand tons higher than the previous year (2005) or + 51,4%, while according to the survey the output in 2007 was record high, outrunning the volume from 2006 by 1,5 thousand tons or + 3,4%. Industrial ajvar and frozen peppers were mostly produced by the industry, (individually contributing with 17% to the overall production), followed by processed gherkins, roasted pepper, chilli peppers etc. Overall speaking, pepper based products were the most dominant in the overall production.

The general characteristic about the F&V processing industry is low level of utilization of installed production capacity. The average utilization in 2005 amounted to approximately 27%, 36% in 2006 and 40% in 2007.

According to the F&V processors the main reasons that prevent higher utilisation of the processing capacities were the following:

- Lack of raw materials (21 responses);
- Lack of working capital (26 responses);
- Lack of labour force (13 responses); and,
- Lack of markets (11 responses).

The Macedonian processed products currently enjoy positive reputation among the food importers from the region and EU, as well. As a result, there is a positive trend for increase of exported quantities. Very favourable trading regime between Macedonia and the EU, and further liberalisation especially as a result of CEFTA agreement should even more enhance the competitive position of the processed fruit and vegetable products. Domestic sale of processed products is also increasing

The EU and neighbouring markets are the main export destinations for domestically produced processed products. According to the survey, 56% of the overall export of processed products was to the EU market, while Serbian market was the second biggest. Overseas markets (particularly Australia and USA) due to large communities of immigrants from Macedonia but also from other Balkan countries are also very important export destinations. Overall exports of processed products in 2007 amounted to 30,3 thousand tons in volume and 28,1 million Euros in value. According to this, the Macedonian processed products have relatively low export value (less than 1kg. per one €). This categorises the processed goods as “commodity” rather than products with added value.

The vast majority of the F&V processing companies are classified as micro or small sized companies (90% in 2006 and 91% in 2007). Only 4 companies in 2006 and in 2007 had more than 51 employees, out of which only 1 had more than 100 employees. There are no large scale enterprises in the F&V processing industry.

The F&V processing industry provided 1.050 full time jobs in 2007 and employed 3.214 seasonal workers in 2007. Small size enterprises engage most of the seasonal labour since they represent the majority of the companies from the processing industry.

The processing industry due to its export orientation already started to implement the up-to-date food safety and food quality systems and standards. According to the survey, 28 companies (\approx 65%) have already implemented HACCP principles in their processing facilities, out of which 14 processing capacities (out of 43 interviewed or 33%) are already HACCP certified.

There is a need for preferential treatment of the F&V processing business in relation to investment opportunities. The industry is closely linked to the rural areas and its further growth will require additional on-farm labour, will stimulate off-farm employment, and will additionally improve the situation in underdeveloped regions especially in regards to job creation, migration of younger population, infrastructure development and stimulation of new private businesses.

The main recommendations that should positively affect the performances of the F&V processing industry in the forthcoming period are the following:

- Promote micro and small enterprises as this has higher demand for full-time labour and greater flexibility in employment of part-time seasonal labour;
- Strengthen the F&V processing value chain through greater collaboration with producers to ensure an adequate supply at the right time;
- Develop mechanisms to increase current under utilisation of the capacities that in return, would allow rapid expansion with minimum capital requirements;
- Develop preferential/grant schemes aiming to support for the industry;
- Provide strong marketing and promotional support to the exporters of processed F&V;

Survey on the Performance of the Fruit and Vegetable Processing Industry 2007

1. INTRODUCTION

The activity titled “Survey on Performances of Fruit and Vegetable Processing Industry 2007” is a result of joint cooperation between SIDA funded Macedonian Agricultural Advisory Support Program 2 (MAASP 2), USAID’s AgBiz Program and the Macedonian Association of Fruit and Vegetable Processors (MAP).

The Macedonian Agricultural Advisory Support Programme 2 (MAASP 2) facilitates high quality agricultural investments through linkages with national and international expertise. It aims to provide a dual service that develops a demand-driven production, processing and market orientation for those with commercial aspirations as well as to focus on relevant livelihood and poverty issues for those with limited means. The programme develops sustainable communication capacities between farmers and rural service providers from the public and private sectors so as to facilitate a policy dialogue at national level on rural service provision and rural development.

AgBiz program is funded by USAID and implemented by ARD, Inc. The goal of the four-year AgBiz program is to increase economic growth in Macedonia through expanded, environmentally sustainable production and sales of value-added agricultural products by enabling producers and processors to compete regionally and globally. This will produce greater incomes for agricultural processors and producers, and ultimately higher revenues for government.

The Macedonian Association of Processors – MAP was established in March 2002, with the overall objective to further develop the fruit and vegetable processing industry, to contribute to the overall economic growth and to increase the employment in the Republic of Macedonia. There are 25 processing companies – members of the association at the moment. Main activities of MAP encompass the following:

- Increasing the competitiveness of Macedonian processed fruit and vegetables;
- Strengthening the potential of MAP members to enter foreign markets;
- Informing members about market trends, technological and legal issues;
- Coordinating business delegations and joint presentations at trade fairs;
- Lobbying towards protecting the interests of the processing industry;
- Establishing business communications with foreign companies and institutions;
- Strengthening the cooperation with farmers and farmer associations; and
- Establishing cooperation with private and public institutions, the business community and international projects active in the Republic of Macedonia.

The above mentioned parties, understanding the need for having detailed information on the performance and impact of the processing industry in the country, agreed to collaborate and to initiate, design and execute the project that would particularly target those issues. Also, AgBiz, MAASP and MAP agreed to devote resources, expertise and commitment in order activity to be successfully accomplished. The cooperation between AgBiz, MAASP and MAP was formalised through signing of a Memorandum of Understanding.

2. OBJECTIVES AND SCOPE

Fruit and vegetable processing industry plays a very important role within the Macedonian agribusiness sector. The industry is very export oriented, continuously improves its performance in terms of increase in production and export value over the last decade and is very labour demanding. However, until 2007 (when the first detailed report for 2006 was prepared) there was no detailed analysis related to the industry performance, number of employees, quantities of raw materials used for processing etc.

The overall objective of the “Survey on Performances of Fruit and Vegetable Processing Industry 2007” project is to provide detailed and updated information on the performances of the industry. More specifically, this project was designed to:

- Research and analyse the production figures and export performances of the fruit and vegetables processing industry;
- Compile and analyse information related to the number of full-time employees and seasonal labour engaged by the industry; and
- Sublime the findings and develop conclusions into a comprehensive report.

The scope of work encompassed the following:

- Prepare an up-to-date data base of the fruit and vegetable processors in RM;
- Gather and analyse relevant export related statistical data ;
- Conduct the survey, collate and analyse data; and
- Prepare a report on findings and present the outcomes to the interested parties.

The final report, although similar to the previous one, contains more details related to the purchasing of the raw materials by the industry, type of processed products produced in 2007 etc. Also, export statistics were reviewed and in accordance with the recommendations, exports of wild grown mushrooms and cultivated mushrooms (champignons) were excluded from the analysis. This reduced the overall export values for the period 2004 – 2007, but provided more realistic information on the export performances of processed fruits and vegetables.

3. WORKING METHODOLOGY

The project was carried out during December 2007 - February 2008 and was consisted of the following phases:

- I. **Preparatory work** - Collecting existing information and developing a data base of fruit and vegetable processors
- II. **Desk Research** - Information collection (directories, databases, statistics)
- III. **Field Research** - Contacting, visiting and interviewing the companies
- IV. **Collating and analysis** - Data entering and data analysing
- V. **Report writing, review and submission**

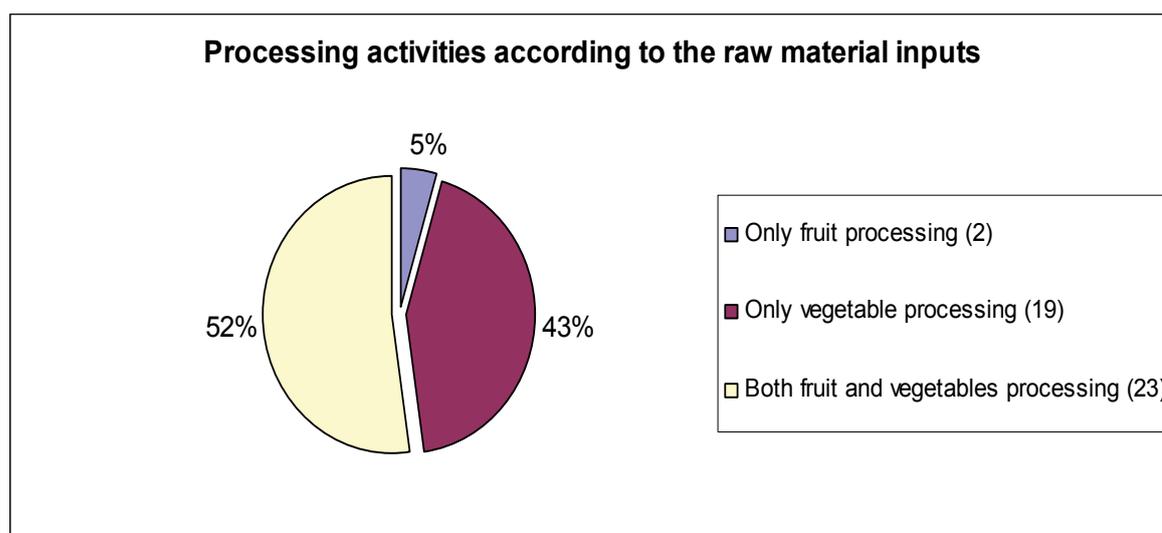
4. RESULTS ON FINDINGS

The survey encompassed 52 fruit and vegetable (F&V) processing capacities in the country, out of which only one company (a small scale processor from Ohrid) declined to participate and to provide the requested details. Another 7 companies could not complete the questionnaire due to the fact that they did not perform any processing activity in 2007 (due to various reasons, but mainly bankruptcy). Hence, the results and the analysis elaborated in this document are based on the answers obtained from 44 active F&V processing companies (unless otherwise stated). Due to the very high response rate, all the details stated in the report are relevant and statistically correct.

4.1 Classification of companies by type of production

Most of the processing companies process both fruits and vegetables. According to the survey, 19 companies process only vegetables, only two are involved in fruit processing solely, while 23 companies process both groups of agricultural products, as presented on the following chart.

Chart 1: Processing activities according to the raw material input

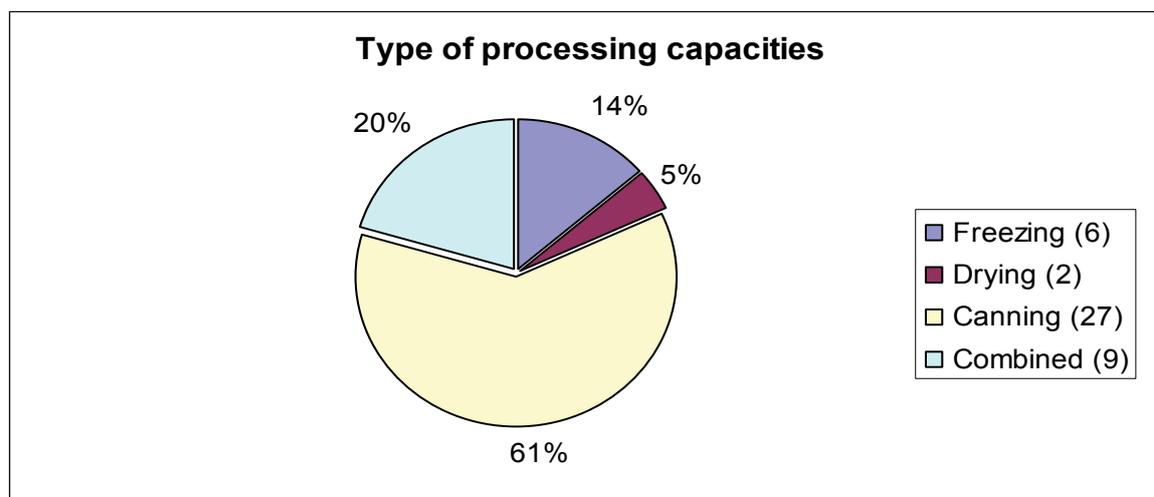


Source: Own research 2008

Although combined processing (fruits and vegetables) is the most present in the processing capacities, it should be mentioned that in most of the cases fruit processing activity is rather symbolic. In general, around 90% from the overall production is vegetable processing, while only 10% is fruit processing activity.

In relation to the type of processing, the largest portion of the processors are involved in canning¹ (27), small number of them are drying (2) and freezing capacities (6), while the rest of them have combined production lines (9), as presented on the following table.

¹ Canned products - Processed fruits and vegetables packed mainly in glass jars, but also in tins or in plastic

Chart 2: Number of companies according to the type of processing

Source: Own research 2008

4.2 Processing industry performance

4.2.1 Raw materials supply

The F&V processing industry is highly dependant on domestic production and supply of agricultural products². High import tariffs and complicated procedures for imports of fresh produce for processing purposes leaves the industry to rely almost exclusively on arrangements with private farmers, enterprises and cooperatives involved in primary production and intermediaries – traders that supply the industry. Contract farming is insufficiently applied as an efficient mechanism that regulates the production and supply of raw materials to the industry. Also, the prices vary heavily, depending on the demand for fresh produce in the region and over or under production in the country. This acts as a serious impediment that prevents the industry to reach its full potential and to conclude larger export contracts. According to the industry, on average only 40-50 % of the raw materials needed by the industry are contracted and delivered by the producers/traders. The bulk of the raw materials are obtained on ad hoc basis typically just before or during high processing season. Lack of cooling and storing facilities within the industry is another major obstacle that prevents better organisation, planning and execution of the production plans. Typical flow of horticultural goods in the country is presented on chart 3.

According to the survey, the industry has significantly increased the quantities of raw materials purchased in 2006 in comparison to 2005. In 2007, the industry purchased 13,3% less raw materials compared to 2006, as presented in the following table.

² The value of processed products in the recent years has experienced a fluctuating trend, as a result of the seasonal character of agricultural production. This trend highlights the low technological level of the industry for processing agricultural products, particularly due to a lack of adequate storage facilities to overcome the seasonal effect and of sufficient raw materials needed for production continuity.

Table 1: Raw materials buy out 2005-2007

Year	Buy out of F&V (in '000 t.)	Increase in % (compared to the previous year)
2005	50,2	-
2006	66,3 ³	+ 32,1
2007	57,5	-13,3

Source: Own research 2008

Red pepper is the most important raw material for the processing industry. According to the survey, the quantities of red pepper purchased by the processing capacities in 2007 represented 50% of the overall raw material volume, as presented below.

Table 2: Types of fresh F&V purchased by the industry in 2007

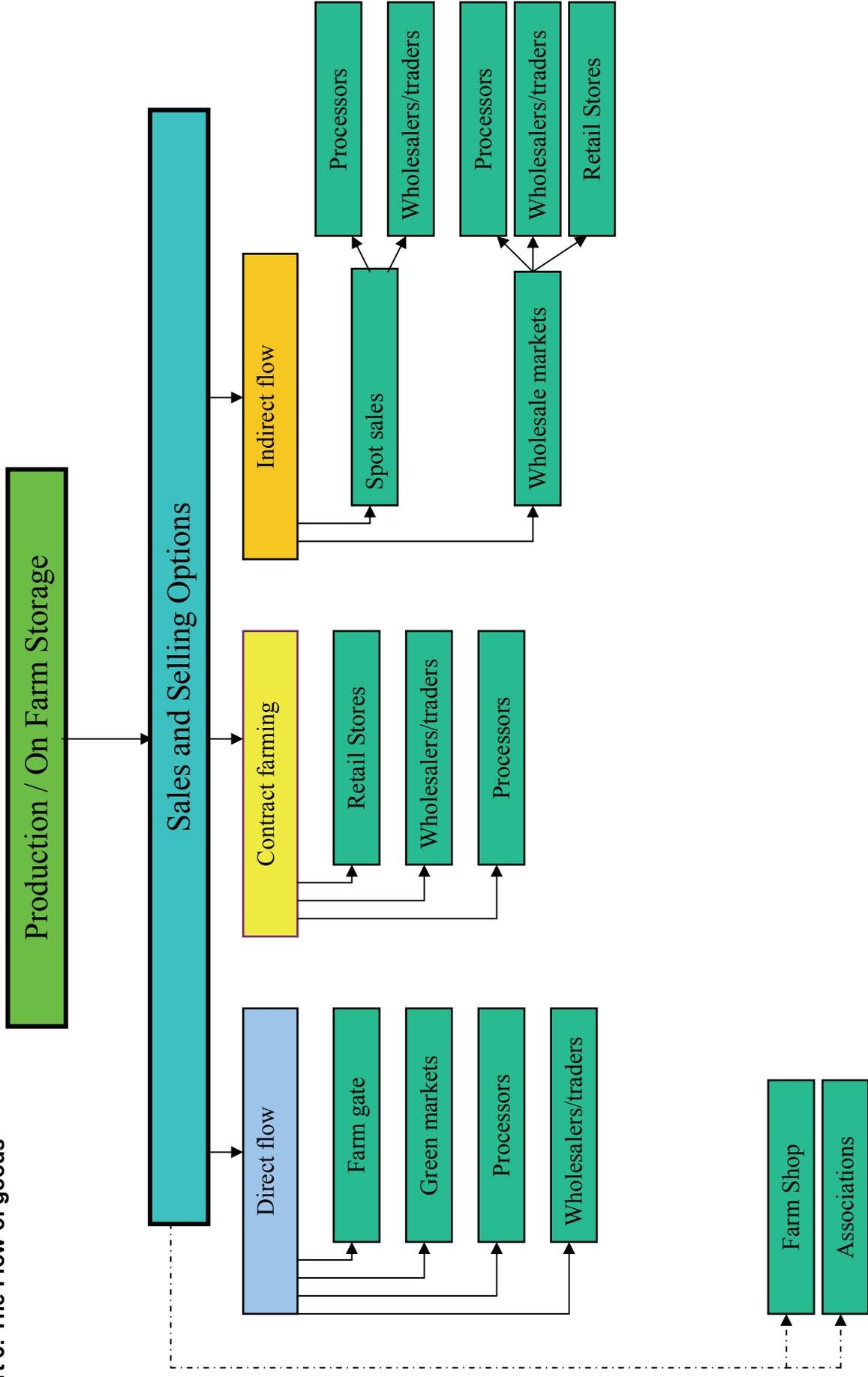
Raw materials	Buy out of F&V (in '000 t.)	% of total
Red pepper (kapija)	28,6	49,7
White pepper	1,2	2,1
Gamba	1,7	3,0
Chilli peppers	2,1	3,7
Gherkins	3,6	6,2
Beetroot	1,8	3,1
Eggplant	2,6	4,5
Cabbage	2,3	4,0
Carrot	1,1	1,9
Industrial tomatoes	1,2	2,1
Onion	1,0	1,7
Sour cherry	3,6	6,3
Plum	0,3	0,5
Industrial apple	0,9	1,6
Others	5,5	9,6
Total	57,5	100

Source: Own research 2008

Overall, the industry purchased 51,8 thousand t. of vegetables (or 90,1%) and 5,7 thousand t. of fruits (or 9,9%) for processing purposes in 2007. Apart from sour cherries which are much demanded product by foreign buyers, the rest of fruit processing activity is rather symbolic.

³ The quantities of raw materials purchased in 2005 and 2006 were not reported in details as in 2007. Therefore, it is assumed that considerable amounts that were traded as fresh (jointly with the quantities of raw materials acquired for processing purposes) were included in the answers provided by the respondents, which resulted with higher volumes of fresh raw materials purchased by the processors than actual ones.

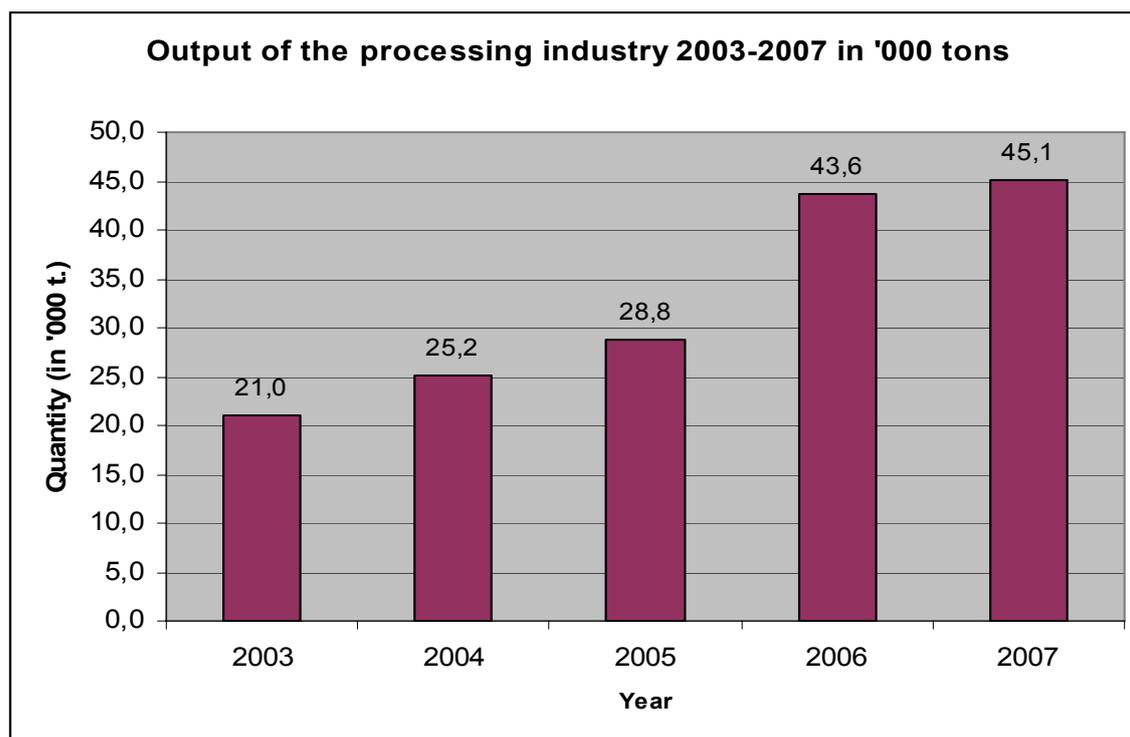
Chart 3: The Flow of goods



4.2.2 Production of processed F&V

The industry over the period 2003 – 2007 shows a continuous increase in production, mainly due to the increased demand for the Macedonian processed goods by the foreign buyers, and domestic market growth resulting from strong penetration of the retail chains and changes in the lifestyle of the population (buying processed products rather than preparing home made preserves). More details are presented on the following chart.

Chart 4: Production output 2003-2007 in '000 tons



Source: Own research 2008

In 2004 the industry output was 4,2 thousand tons higher than in 2003 or + 20%, while in 2005 the production was 3,6 thousand tons higher than in 2004 or + 14,3%. According to the available information the production output in 2006 was 14,8 thousand tons higher than the previous year (2005) or + 51,4%, while according to the survey the output in 2007 was record high, outrunning the volume from 2006 by 1,5 thousand tons or + 3,4%. Summary of the production figures is presented below.

Table 3: Production figures 2003-2007

Year	Total production ('000 t.)	Increase in quantity (in 000 t. compared to the previous year)	Increase in % (compared to the previous year)	Index
2003	21,0	-	-	100
2004	25,2	+ 4,2	+ 20,0	120
2005	28,8	+ 3,6	+ 14,3	137
2006	43,6	+ 14,8	+ 51,4	208
2007	45,1	+ 1,5	+ 3,4	215

Source: Own research 2008

One of the main characteristics of the 2007 season was favourable weather conditions and more raw material production contracted by the industry than in 2006 which enabled the processors to optimise their production plans. Canning component had highest contribution in the overall production of processed products in 2007, as presented below.

Table 4: Production of processed F&V by category in 2007

Category	(in tons)	% of total
Canning	32 688	72,5
Freezing	12 165	27,0
Drying	219	0,5
Total	45 072	100

Source: Own research 2008

According to the survey, industrial ajvar and frozen peppers were mostly produced by the industry, (individually contributing with 17% to the overall production), followed by processed gherkins, roasted pepper, chilli peppers etc. Overall speaking, pepper based products were the most dominant in the overall production. More details related to the quantities of the specific products produced by the processing industry are provided in the following table.

Table 5: Processed F&V products produced in 2007

Product name	(in '000 t.)	% of total
Industrial ajvar	7,7	17,0
Homemade ajvar	1,9	4,2
Lutenica	1,0	2,2
Roasted pepper	2,7	6,0
Bleached pepper	1,4	3,1
Chilli peppers	2,3	5,1
Gherkins	5,0	11,1
Beetroot	1,9	4,2
Ketchup	1,4	3,1
Mixed salads	1,1	2,4
Frozen sour cherries	1,6	3,6
Frozen pepper	7,7	17,0
Other	9,4	21,0
Total	45,1	100

Source: Own research 2008

4.2.3 Utilization of production capacity

The general characteristic about the F&V processing industry is low level of utilization of installed production capacity. The average utilization in 2005 amounted to approximately 27%, 36% in 2006 and 40% in 2007. The overall installed capacity for processing of F&V is around 114.000 t. of final output. Increased utilization of the production capacity in 2006 and 2007 is mainly a result of an improved accessibility to raw materials (more contracted production), and improved production planning made by the management teams of the processing capacities. However, apart from the installed capacity in the country, additional factors heavily affect the overall performance of the industry such as:

- Continuous supply of quality raw materials;
- Improved dialogue with F&V raw material suppliers (sorting, grading and delivery of produce);
- Defined purchasing prices for raw materials well before the season;
- Building of cooling facilities for storing the products;
- Access to finance;
- New product development and production of value added products;
- Training of the management and employees;
- Marketing related support etc.

According to the 2007 survey, targets of the F&V processing industry for 2007 season were buy out of 71,8 thousand tons of raw materials (57,5 thousand tons were actually purchased) and final output of 54,1 thousand tons (45,1 thousand tons actually produced), or -20% of the projected plans before the start of the production season. According to the F&V processors the main reasons that prevent higher utilisation of the processing capacities were the following:

- Lack of raw materials (21 responses);
- Lack of working capital (26 responses);
- Lack of labour force (13 responses); and,
- Lack of markets (11 responses).

4.2.4 Trade with processed F&V

The processing industry of the RM has strong export orientation. Even in the former country, the capacities were designed to serve Ex-Yugoslav republics – Serbia, Slovenia, Croatia etc. After the break up, large Macedonian capacities struggled to replace the existing markets with new export destinations or to renew their business contacts. On the other hand, private initiative resulted in establishment of small scale private processors of F&V that were flexible enough to meet the expectations of the food importers from the region and EU member states. This trend continues since 3 new processing companies have started their business in 2007, thus contributing to the overall performances of the industry.

The Macedonian processed products currently enjoy positive reputation among the food importers from the region and EU, as well. As a result, there is a positive trend for increase of exported quantities. Very favourable trading regime between Macedonia and the EU, and further liberalisation especially as a result of CEFTA agreement should even more enhance the competitive position of the processed fruit and vegetable products.

Interestingly, domestic sales are also increasing, contributing to the overall performance of the industry. For example, domestic sales in 2004 were 9% higher than in 2003, while in 2005 the increase was 13% above 2004. Following this positive trend domestic sales in 2006 reached the volume of 7,5 thousand tons and further increased by 5% in 2007, reaching the volume of 7,9 thousand tons. As already mentioned, the key reasons for having an increased domestic demand for processed products are:

- Strong penetration of the supermarkets (retail chains) and changes in the purchasing patterns of the domestic consumers;
- Replacement of the traditional home-style individual production of processed goods (preserves) and shift towards buying products produced by the industry; and,
- Increased awareness about food safety and food quality issues.

Details related to the production, export and domestic sales as well as export values for the period 2004-2007 are presented in the following table.

Table 6: Performance of the F&V processing industry 2004-2007

Year	Total production ('000 t.)	Export ('000 t.)	Domestic market ('000 t.)	Export value (in Mil. €)
2004	25,2	18,2	6,0	13,8
2005	28,8	21,0	6,8	17,8
2005/2004	+ 2,5	+ 2,8	+ 0,8	+ 4,0
2006	43,6	25,6	7,5	23,5
2006/2005	+ 15,4	+ 5,0	+ 0,7	+ 5,7
2007	45,1	30,3	7,9	28,1
2007/2006	+ 1,5	+ 4,7	+ 0,4	+ 4,6

Source: State Statistical Office, Own research 2008

The EU and neighbouring markets are the main export destinations for domestically produced processed products. According to the survey, 56% of the overall export of processed products was to the EU market, while Serbian market was the second biggest. Overseas markets (particularly Australia and USA) due to large communities of immigrants from Macedonia but also from other Balkan countries are also very important export destinations. The most important export markets for domestically produced processed products, including the exported quantities and values for the period 2004-2007 are presented in the following table.

Table 7: Main export markets for processed F&V 2004-2007

Year: 2004	Quantity (in '000 t.)	Quantity (In %)	Value (in Mil. €)	Value (in %)
Total export	18,2	100	13,8	100
EU	8,7	47,8	6,7	48,6
Serbia and Montenegro ⁴	5,8	31,9	3,5	25,4
Australia	1,1	6,0	1,0	7,3
Croatia	0,9	5,0	0,9	6,5
Bosnia and Herzegovina	0,7	3,9	0,6	4,4
USA	0,4	2,2	0,5	3,6
Other	0,6	3,3	0,6	4,4
Year: 2005	Quantity (in '000 t.)	Quantity (In %)	Value (in Mil. €)	Value (in %)
Total export	21,0	100	17,8	100
EU	9,0	42,9	7,9	44,4
Serbia and Montenegro	6,6	31,4	4,7	26,4
Croatia	1,7	8,1	1,6	9,0
Bosnia and Herzegovina	1,3	6,2	1,2	6,7
USA	0,6	2,9	0,7	3,9
Australia	0,5	2,4	0,6	3,4
Other	1,3	6,2	1,1	6,2
Year: 2006	Quantity (in '000 t.)	Quantity (In %)	Value (in Mil. €)	Value (in %)
Total export	25,6	100	23,5	100
EU	11,7	45,7	10,5	44,7
Serbia and Montenegro	7,7	30,0	6,7	28,5
Croatia	2,0	7,8	2,0	8,5
Bosnia and Herzegovina	1,6	6,3	1,6	6,8
Australia	0,7	2,7	0,9	3,8
USA	0,5	2,0	0,8	3,4
Other	1,4	5,5	1,0	4,3
Year: 2007	Quantity (in '000 t.)	Quantity (In %)	Value (in Mil. €)	Value (in %)
Total export	30,3	100	28,1	100
EU	17,0	56,1	14,5	51,6
Serbia ⁵	6,0	19,8	5,2	18,5
Croatia	2,1	6,9	2,2	7,8
Bosnia and Herzegovina	1,6	5,3	1,6	5,7
Montenegro	1,5	5,0	1,7	6,1
Australia	0,9	3,0	1,2	4,3
USA	0,7	2,3	0,8	2,9
Other	0,5	1,6	0,9	3,2

Source: Own research 2008

According to the research, the most exportable processed products are pepper based products, in particular ajvar and lutenica (tariff number 2005), roasted red

⁴ With Kosovo, also for 2005 and 2006.

⁵ With Kosovo.

peppers, frozen peppers (0710), gherkins, chilli and semi sweet pepperoni, beet root (tariff number 2001), dried products (0712), sour cherries frozen (0811) and preserved in alcohol (2008), etc. Definitions of the most important tariff numbers are provided in this report as annex 4, while complete statistics related to the export by country (values, quantities) and by tariff number (value, quantities) for the period 2004-2007 are attached as annex 4.

As it could be seen from the above, the Macedonian processed products have relatively low export value (less than 1kg. per one €). This categorises the processed goods as “commodity” rather than products with added value. Also, producing and selling of own brands is lower than producing under private labels. As a result, the industry is building its export strategy primarily on competitive prices, rather than supply of value added products. Product differentiation; new product development; market segmentation, positioning and targeting; joint exports etc. will become major challenges that will face the industry in the forthcoming period.

At the moment, domestic processors seem to be heavily dependant on intermediate dealers (importers and wholesalers) when exporting their products abroad, although some of the processors already started to negotiate directly with the retail chains and/or to establish partnerships with specialized food products distributors. Domestically, they distribute their products directly to the retailers (in particular to the retail chains) or use intermediaries (wholesalers/distributors) with developed distribution network to cover numerous small retail shops. Production under private labels especially for large retail chains active in the country is also present.

4.3 Location of the processing companies, size and employment

In order to better understand the role of the processing industry and the impact that it has on the agribusiness sector performance, the analysis also takes into consideration several aspects related to the size of the companies and employment implications, both for full time and seasonal employment.

4.3.1 Location of the companies

The biggest concentration of the processing companies is registered in Gevegelija region (10), in Strumica region (8), Negotino-Kavadarci (7) and Bitola – Ohrid (7), while the rest of the facilities are scattered throughout the country. Geographical location of all F&V processing capacities (including those that reported no activities in 2007) are provided annex 2.

4.3.2 Size of the companies

According to the Macedonian legislation, companies in the country are classified as micro, small, medium and large according to the number of employees or by their annual turnover. The first criterion is mostly used to determine the size of the company. For the purpose of this analysis companies are classified according to the number of employees, as follows:

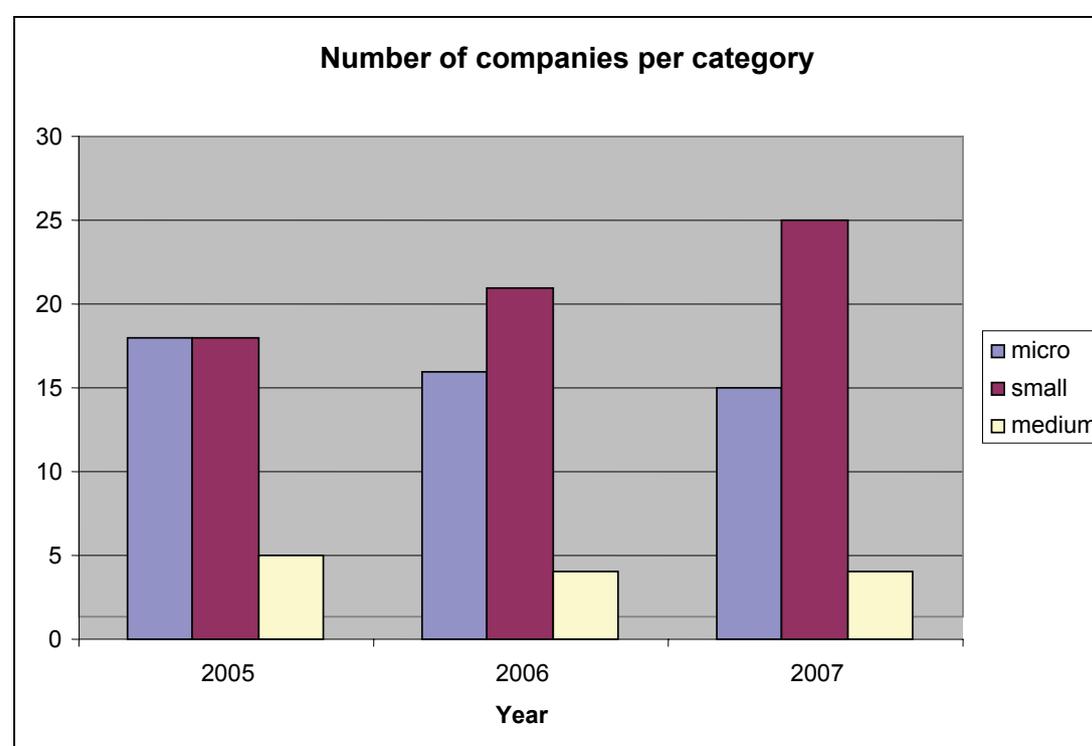
- Micro enterprises - up to 10 employees;
- Small enterprises - 11 to 50 employees;
- Medium size enterprises - 51 to 250 employees; and,
- Large enterprises – more than 250 employees.

Information related to the size of the F&V processing companies is provided in the following table.

Table 8: Size of F&V processing companies 2005-2007

Category	2005	As % of total	2006	As % of total	2007	As % of total
Micro enterprises	18	44	16	39	15	34
Small enterprises	18	44	21	51	25	57
Medium enterprises	5	12	4	10	4	9
Large enterprises	0	0	0	0	0	0
Total:	41	100	41	100	44	100

Source: Own research 2008

Chart 5: Number of processing companies by size in 2005-2007

Source: Own research 2008

The vast majority of the F&V processing companies are classified as micro or small sized companies (90% in 2006 and 91% in 2007). Only 4 companies in 2006 and in 2007 had more than 51 employees, out of which only 1 had more than 100 employees⁶. According to the surveys conducted in 2006 and 2007, the number of micro sized companies decreased from 18 in 2005, 16 in 2006, and 15 in 2007, while the number of small enterprises increased from 18 in 2005 to 25 in 2007. This preponderance of micro and small enterprises should encourage greater full-time labour demand in the forthcoming period.

⁶ Although one of the respondents reported more than 300 full time employees, for the purpose of this survey only F&V processing department was taken into consideration and reviewed as small enterprise due to the fact that F&V processing is not their core business activity.

There are no large scale enterprises in the F&V processing industry, due to the seasonal character of the production, which in return only provides an opportunity for seasonal employment.

4.3.3 Employment and seasonal labour

The F&V processing industry is very labour intensive. Many of the production processes such as sorting, filling etc. are manually handled. Therefore, there is a need for seasonal labour, especially during production peaks. Extreme seasonality of the processing business on the other hand, does not allow larger employment on full time basis. According to the data provided by respondents the total number of full time employees amounted to 1.021 in 2005, 1.125 in 2006 and 1.050 in 2007, showing favourable increase by 10% in 2006 and decrease by 6,7% in 2007, as presented in the following table. The main reasons for decreased number of full time employment is that one medium sized manufacturer stopped its operations due to bankruptcy while another medium sized producer started relocation and renovation of the existing plant, thus reducing the number of employees to a minimum in 2007.

Table 9: Number of full time employees 2005-2007

Year	Full time employees	Increase in % (compared to the previous year)
2005	1.021	-
2006	1.125	+ 10%
2007	1.050	-6,7%

Source: Own research 2008

As already mentioned, seasonal labour is particularly important for the processing companies. The industry does not require a high level of skills or education from the seasonal workers. Most of the production phases do not require specialised preparations and/or training, apart from basic instructions related to net weight of finished goods, rejects identification and handling, waste disposal, etc. Complex procedures are handled by the full time employees. Most of the seasonal workers are recruited from the rural areas (villages), which is appreciated by the employers, since they have the experience in handling agricultural products. Women are mainly engaged to work on the production lines, while men are mainly involved in more physical demanding activities (loading, unloading etc.)

There is a positive trend related to the employment of seasonal labour. According to the survey, the number of seasonal workers engaged by the industry increased from 2.780 in 2006 to 3.214 in 2007, or + 15,6%. Small size enterprises engage most of the seasonal labour since they represent the majority of the companies from the processing industry. More details are provided in the table below.

Table 10: Engaged seasonal labour by the industry 2005-2007

Company size	2005	% of total	2006	% of total	2007	% of total
Micro enterprises	366	17	520	19	626	20
Small enterprises	1.333	62	1.665	60	1.948	60
Medium enterprises	435	20	595	21	640	20
Total	2.134	100	2.780	100	3.214	100

Source: Own research 2008

The seasonal labour is usually engaged during the high processing season for around 4-6 months per year. It should be emphasised that the seasonality depends on the type of processing (canning, freezing or drying). The most important factor for engagement of the seasonal labour is availability of the raw materials for processing.

4.3.4 Seasonal labour compensation rates

Seasonal labour compensation scheme is calculated as net price per working hour. According to the existing legislation, taxes (personal income tax) related to the engagement of seasonal labour are covered by the employer. Yet, the governmental authorities insist on hiring the seasonal labour on regular employment basis even for the very short period of time. This situation, being unfavourable for the processors, results with increased administration procedures (registration of the employees and cancelling of their employment contract etc.). Due to the unreliable supply of raw materials, production plans are frequently changed and/or adjusted during the production season, and have direct impact on the demand for seasonal labour even for a very short period of time.

The net price per working hour in 2007 varies from 37,5 to 75 MKD. Compared to 2006, there is a slight increase of the net price per hour paid in 2007(+ 1% compared to 2006), the average reaching 48,4 MKD/hour. Based on the average net price per working hour, one seasonal worker usually earns an average net monthly salary of around 9.500 MKD. This amount is still below the national average (\approx 12.000 MKD/month). Yet, it should be mentioned that some of other labour intensive industries, such as textile, offer even lower wages than the processing industry, although they are much more demanding in regards to skills and education of the labour force.

4.3.5 Food safety and food quality

Food safety and food quality issues are becoming essential prerequisites for managing every food business, including processed F&V. Apart from the strict requirements of the foreign buyers and markets, the domestic authorities and in particular consumers are becoming much more aware about the safety and quality of food products. According to the existing national food safety legislation, all food processing companies must implement HACCP by the end of 2008.

The processing industry due to its export orientation already started to implement the up-to-date food safety and food quality systems and standards. According to the survey, 28 companies (\approx 65%) have already implemented HACCP principles in their processing facilities, out of which 14 processing capacities (out of 43 interviewed or 33%) are already HACCP certified. The certificates are granted from domestic and/or foreign certification bodies. More details are provided in the following table.

Table 11: Implemented food safety & quality standards by F&V processors

HACCP		ISO 9000:2000		ISO 22 000	
Implemented	Certified	Implemented	Certified	Implemented	Certified
28	14	20	14	9	8

Source: Own research 2008

5. CONCLUSIONS

- Fruit and vegetable processing industry has made continuous improvements over the period 2003 – 2007;
- The industry is defined as very seasonal, export oriented and products enjoy high reputation on regional and international markets;
- The demand for processed products is growing on international as well on the domestic market; the demand from foreign buyers is bigger than supply;
- It is consisted of 52 processing capacities, predominantly canning and combined processing enterprises;
- Majority of the facilities are located near to the main production regions in the country;
- Processing of vegetables is dominant business activity, covering around 90% of the total production;
- The processing output in 2007 is 45,1 thousand tons or + 3,4% in comparison to 2006;
- Majority of the processing companies are defined as small, while there is no large F&V processing enterprise;
- The industry employs 1.050 full time employees and 3.214 seasonal employees ;
- Most of the seasonal workers are from rural areas, skilled in handling agricultural products;
- The utilisation of the industry is still modest, reaching 40% in 2007;
- Access to capital and shortages of raw materials are the biggest impediments for further growth of the industry;
- Increased production of raw materials for the processing industry, dialogue with raw material suppliers and infrastructure investments are needed for enhanced performances of the industry;
- Further growth of the industry will positively affect rural and underdeveloped regions through job creation, infrastructure improvements, and migration prevention.

6. RECOMMENDATIONS

- Promote micro and small enterprises as this has higher demand for full-time labour and greater flexibility in employment of part-time seasonal labour;
- Greater collaboration with producers to ensure an adequate supply at the right time;
- Develop mechanisms to increase current under utilisation of the capacities that in return, would allow rapid expansion with minimum capital requirements;
- Develop preferential/grant schemes aiming to support for the industry;
- Provide strong marketing and promotional support to the exporters of processed F&V;
- Identify, promote and facilitate model(s) for improved multi stakeholders' dialogue (companies, MAP, MAFWE, MoE, foreign donor projects etc.).

Annex 1: List of F&V processing companies

No.	Company name	Address	Location	Tel.	Fax	E-mail	Web
1	Zora Sped	Industriska bb	Gevgelija	034 217 081	034 217 082	zorasped@mt.net.mk	www.zorasped.com.mk
2	Vori	Industriska zona bb	Gevgelija	034 218 171	034 211 188	vori@vori.com.mk	www.vori.com.mk
3	Diem GP	Basut	Negorci	034 231 428	034 231 428	diem-gp@mt.net.mk	
4	Tehnoalat	Marsal Tito 124	Gevgelija	034 211 985	034 218 968	tehnoalat@mt.net.mk	www.hinaproducts.com.mk
5	Vipro	Moinski pat bb	Gevgelija	034 211 917	034 217 931	vipro@mt.net.mk	www.vipro.com.mk
6	MTD Prom	Vardarski rid bb	Gevgelija	034 211 888	034 211 888	info@pajdakov.com.mk	www.pajdakov.com.mk
7	Altra	Slobodan M. Danko 111	Gevgelija	034 214 384	034 216 258	contact@altra.com.mk	www.altra.com.mk
8	Irofozen	Zeleznicka bb	Gevgelija	076 589 699			
9	Sas Kuprom	Industriska bb	Gevgelija	034 218 889	034 218 889	saskuprom@yahoo.com	
10	Ekosto	S. Stojakovo	Stojakovo, Gevgelija	034 235 650	034 235 650	ekosto@mail.net.mk	
11	DIM Komerc	Kame Polizov bb	Valandovo	034 381 562	034 383 562	dimkomerc@mt.net.mk	www.dimkomerc.com.mk
12	Agrokomerc 92	Leninova bb	Strumica	034 322 287	034 344 647	agrokomerc92@mt.net.mk	www.agro-komerc92.com.mk
13	Mabi Tade	Goce Delcev 9	Strumica	034 334 400	034 334 402	mabi_trade@mt.net.mk	www.mabi-trade.com
14	KIM	Industriska bb	Negotino	043 362 760	043 370 761	info@kim.com.mk	www.kim.com.mk
15	Petrov Kompani	Industriska bb	Kavadarci	043 414 017	043 415 469	sales@petrov-ffg.com	www.petrov-ffg.com
16	POT	S. Kolesino 259	Kolesino, Strumica	034 352 052	034 352 053	pot.kolesino@gmail.com	www.pot.kolesino.com
17	Cekofam	Boris Kidric 50	Pehcevo	033 441 469	033 441 469	cekofam@yahoo.com	
18	Lars	Strumicki pat bb	Stip	032 385 351	032 385 351	darko@lars.com.mk	www.susaralars.com.mk
19	Konimex	Prvomajska-9, 10	Negotino	02 24 65 953	02 26 69 472	info@konimex.com.mk	www.koro.com.mk
20	Nimeks SA	S. Tarinci	Tarinci, Stip	032 300 951	032 300 999	nimeks_sa@mt.net.mk	
21	Grin Product	S. Dzepciste	Dzepciste, Tetovo	044 488 542	044 488 883		
22	Domatti	M. Tito 73	Sveti Nikole	032 443 316	032 440 315		
23	Vasilev Komerc	S. Turnovo	Turnovo, Strumica	034 358 883	034 358 883	info@delifo.com	www.delifo.com
24	Ksenos	Partizanska 10	Demir Hisar	047 277 607	047 277 608	kzenos.importco@gmail.com	
25	Bonum	Bul. Vojvodina	Skopje	02 25 51 662	02 25 551 662	bonum@mt.net.mk	www.bonum.com.mk
26	Trgoinzenering	Industriska bb	Radovis	032 630 231	032 630 230	info@ti.com.mk	www.ti.com.mk
27	Medium Export	Dimitrie Tucovik 24	Skopje	02 31 17 146	02 31 17 534	medium@mt.net.mk	

28	Agrova	Kozle 30 b	Skopje	02 30 81 415	02 30 81 415	02 30 81 415	agrovamk@gmail.com	
29	Antares	Goso Vikentiev 23	Kocani	033 277 012	033 277 120	033 277 120	antares_sb@yahoo.com	www.antares.com.mk
30	Baga Fud	Prilepska bb	Bitola	047 235 294	047 235 294	047 235 294	belatrejd1@yahoo.com	
31	Sika	Voin Draskovic 1	Skopje	02 20 50 920	02 20 50 921	02 20 50 921	isaeva@sika.com.mk	
32	Univerzal Promet	Goso Vikentiev 23	Kocani	033 271 030	033 271 040	033 271 040	univerz@mt.net.mk	www.univerzal-promet.com.mk
33	Trgoproduct	M. Tito	Strumica	034 330 770	034 331 222	034 331 222	zaevb@mt.net.mk	
34	Fruktana	S. Argulica	Argulica, Stip	032 382 292	032 384 128	032 384 128	fruktana@gmail.com	
35	Svision Agrar	Industriska bb	Resen	047 451 912	047 452 191	047 452 191	agrar@svision.com.mk	
36	Industriski ladinik	Marsal Tito bb	Tetovo	044 338 992	044 335 614	044 335 614		
37	Agrolon	Ratko Jovanovik 67	Stip	032 459 590	032 459 590	032 459 590	trgoitrans@mt.net.mk	
38	Mirana	Blagoj Necev 49	Veles	043 222 605	043 222 205	043 222 205	miranafood@yahoo.com	www.mirana.mk
39	Vitalia	516 bb	Skopje	02 3217 177	02 3217 176	02 3217 176	contact@vitalia.com.mk	www.vitalia.com.mk
40	DS food	11 Oktomvri bb	Kumanovo	031 437 197	031 437 196	031 437 196	adminis@dsfoods.com.mk	
41	MaxVadkom	Straso Pindzur 37	Valandovo	034 386 271	034 383 009	034 383 009		
42	Kvalitet Komerc	Ilindenska bb	Bitola	047 228 398	047 221 398	047 221 398	kvalitetkomerc@mt.net.mk	
43	Vitaminka	Lece Koteski bb	Prilep	048 407 407	048 407 451	048 407 451	contact@vitaminka.com.mk	www.vitaminka.com.mk
44	Jomi fud	Skopski pat bb	Veles	043 243 234	043 243 234	043 243 234	jomifood@yahoo.com	

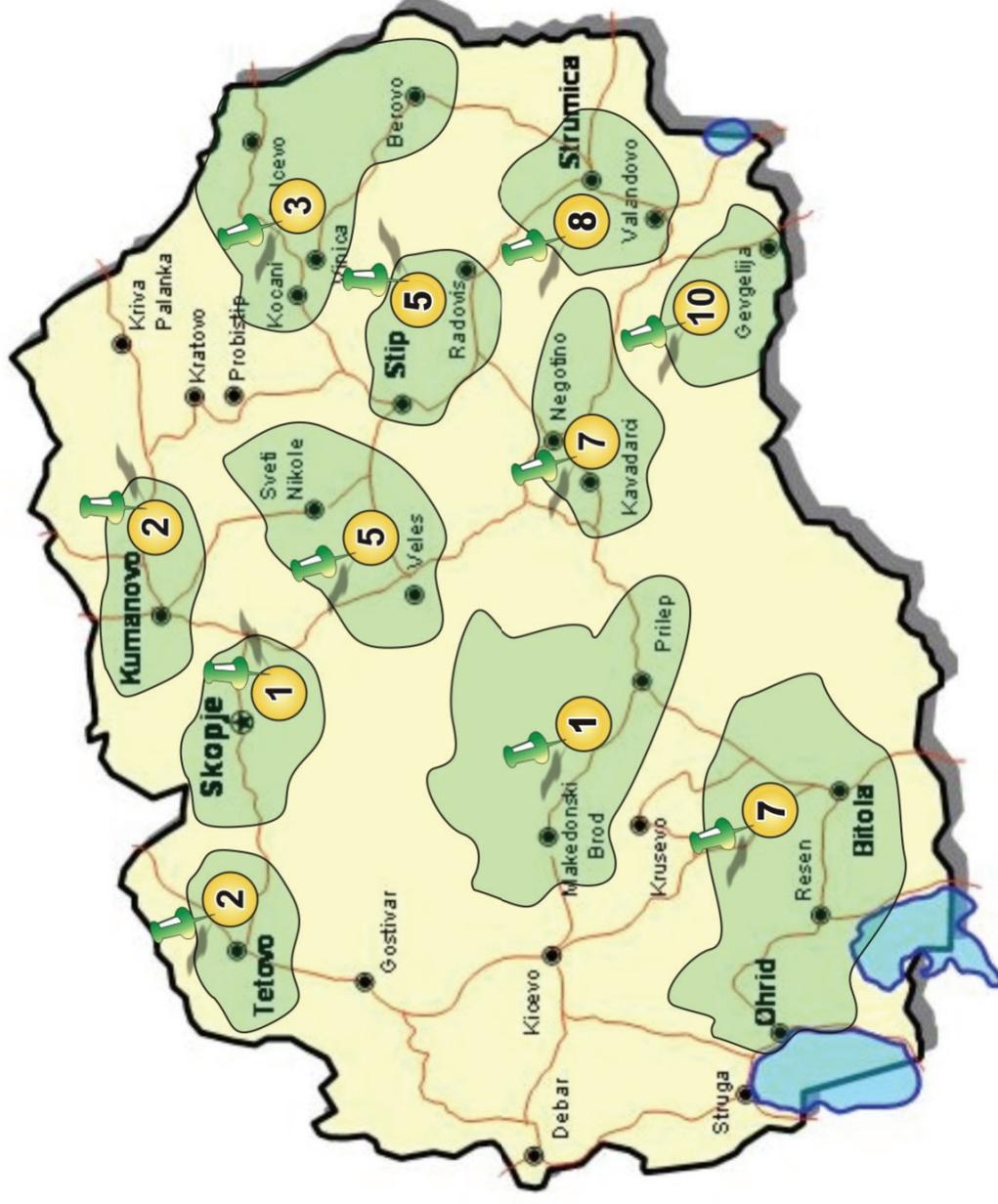
Companies that did not respond

45	Maemi	Zeleznicna bb	Ohrid	046 262 203	046 262 203	046 262 203	maemi@mt.net.mk	
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Inactive Companies

46	Nak Sport	Bel kamen bb	Kavadarci	02 30 65 290	02 30 65 290	02 30 65 290	cemerskopole@sonet.com.mk	
47	Skok Trade	GTC, Kej 13 Noemvri 3/1	Skopje	02 32 30 611	02 32 30 618	02 32 30 618	skok@unet.com.mk	www.rosko.com.mk
48	Vitapela		Bitola					
49	Konzervna Strumica		Strumica	034 331 454	034 331 454	034 331 454		
50	Makedonija	Industriska zona bb	Negotino	043 370 985	043 360 071	043 360 071	beag@mt.net.mk	
51	Proimpex		Resen	02 3218 230	02 3113 183	02 3113 183		
52	Ango Komerc		Skopje		02 120 080	02 120 080	stojanoskiza@mt.net.mk	

Annex 2: Geographical location of processing facilities in RM



Annex 3: Definition of different tariff numbers

Tariff number	Description
0710	vegetables, uncooked or cooked by steaming or boiling in water, frozen
0711	vegetables provisionally preserved, e.g. by sulphur dioxide gas, in brine, in sulphur water or in other preservative solutions, but unsuitable in that state for immediate consumption
0712	dried vegetables, whole, cut, sliced, broken or in powder, but not further prepared
0713	dried leguminous vegetables, shelled, whether or not skinned or split
0714	manioc, arrowroot, salep, jerusalem artichokes, sweet potatoes and similar roots and tubers with high starch or inulin content, fresh or dried, whether or not sliced or in the form of pellets; sago pith
0811	fruit and nuts, uncooked or cooked by steaming or boiling in water, frozen, whether or not containing added sugar or other sweetening matter
0812	fruit and nuts, provisionally preserved, e.g. by sulphur dioxide gas, in brine, in sulphur water or in other preservative solutions, but unsuitable in that state for immediate consumption
0813	apricots, prunes, apples, peaches, pears, pawpaws, tamarinds and other dried fruit n.e.s.; mixtures of edible nuts or dried fruits
2001	vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar or acetic acid
2002	tomatoes, prepared or preserved otherwise than by vinegar or acetic acid
2003	mushrooms and truffles, prepared or preserved otherwise than by vinegar or acetic acid
2004	other vegetables prepared or preserved otherwise than by vinegar or acetic acid, frozen (excl. tomatoes, mushrooms and truffles)
2005	other vegetables prepared or preserved otherwise than by vinegar or acetic acid (excl. frozen, and tomatoes, mushrooms and truffles)
200600	fruit, nuts, fruit-peel and other parts of plants, preserved by sugar, drained, glaze or crystallized
2007	jams, fruit jellies, marmalades, fruit or nut puree and fruit or nut pastes, being cooked preparations, whether or not containing added sugar or other sweetening matter
2008	fruits, nuts and other edible parts of plants, prepared or preserved, whether or not containing added sugar or other sweetening matter or spirit, n.e.s.
200950	tomato juice, whether or not containing added sugar or other sweetening matter (excl. fermented or containing alcohol)
200971	apple juice (up to 20 brix), whether or not containing added sugar or other sweetening matter (excl. fermented or containing alcohol)

Annex 4: Export of Macedonian processed products 2004-2007

Table: Export by country, value and quantities in 2004

Country		Quantities (in kg.)	Value (in €)
Non EU	Serbia and Montenegro	5,819,472	3,459,892
	Australia	1,059,598	1,023,651
	Croatia	880,749	870,822
	Bosnia and Herzegovina	687,671	609,497
	USA	388,898	459,527
	Switzerland	232,799	351,941
	Canada	94,830	133,541
	Albania	271,939	118,226
	Russia	57,163	28,785
	Great Britain	10,316	20,494
	Iran	5,706	15,576
	Norway	14,122	15,096
	Bulgaria	21,232	9,515
	NATO	1,491	1,465
Non EU Total		9,545,986	7,118,029
EU	Germany	2,865,249	2,058,150
	Greece	2,961,572	1,685,556
	Slovenia	709,678	689,855
	Italy	92,210	532,005
	France	545,848	521,115
	Austria	465,974	405,543
	Holland	241,897	262,847
	Poland	311,374	183,729
	Hungary	151,760	132,060
	Belgium	199,669	110,514
	Sweden	56,612	65,024
	Czech Republic	39,008	20,314
	Spain	5,040	10,854
	Slovakia	100	10
EU Total		8,645,992	6,677,577
Grand Total		18,191,978	13,795,605

Table: Export by tariff number, value and quantities in 2004

Tariff Group	Quantities (in kg.)	Value (in €)
2005	4,340,970	4,301,778
2001	3,577,678	2,682,429
0710	3,433,472	1,836,768
2008	1,114,665	1,399,790
2007	3,049,214	1,057,038
0811	1,004,642	825,799
0712	90,071	409,936
2002	355,315	333,038
0713	326,184	242,789
0711	410,045	221,275
2004	185,442	198,638
0813	56,805	109,664
2003	31,860	75,874
200971	91,982	52,037
0812	39,149	34,737
0714	79,438	7,214
200600	1,387	4,833
200950	3,660	1,968
Grand Total	18,191,978	13,795,605

Table: Export by country, value and quantities in 2005

Country		Quantities (in kg.)	Value (in €)
Non EU	Serbia and Montenegro	6,634,366	4,688,441
	Croatia	1,652,725	1,578,302
	Bosnia and Herzegovina	1,251,301	1,244,049
	USA	550,417	713,329
	Australia	538,877	557,679
	Switzerland	349,240	449,263
	Canada	150,594	246,619
	Bulgaria	529,528	155,889
	Sri Lanka	91,505	81,745
	Albania	139,615	73,493
	Russia	97,306	62,012
	Romania	30,930	22,882
	Norway	17,000	16,335
	South Africa	4,949	6,321
	Turkey	3,570	5,295
	NATO	3,187	2,529
	Zimbabwe	7,200	1,656
	Slovakia	360	608
Non EU Total		12,052,669	9,906,448
EU	Germany	2,771,682	2,215,003
	Greece	2,558,282	1,301,054
	Italy	208,148	1,145,436
	Slovenia	895,568	868,405
	Holland	556,805	550,863
	Austria	429,763	475,712
	France	500,540	471,404
	Poland	337,728	225,128
	Hungary	274,400	206,007
	Belgium	207,352	147,176
	Sweden	109,493	145,019
	Great Britain	32,603	63,962
	Spain	24,565	20,370
	Cyprus	17,587	13,735
	Denmark	20,497	10,470
	Czech Republic	6,184	3,992
EU Total		8,951,198	7,863,736
Grand Total		21,003,867	17,770,184

Table: Export by tariff number, value and quantities in 2005

Tariff Group	Quantities (in kg.)	Value (in €)
2005	5,571,265	5,925,519
2001	4,371,404	3,707,253
0710	3,630,597	1,832,031
0811	1,482,335	1,328,094
2008	933,804	1,263,471
2007	2,413,158	932,553
0712	90,286	755,064
2004	477,549	579,939
2002	354,463	319,691
0711	354,817	205,577
200971	266,426	175,173
0713	429,815	173,118
2003	89,119	157,205
0812	199,670	155,529
200600	140,272	115,117
0813	140,776	93,956
210320	58,097	50,834
0714	5	52
200950	8	7
Grand Total	21,003,867	17,770,184

Table: Export by country, value and quantities in 2006

Country		Quantities (in kg.)	Value (in €)
Non EU	Serbia and Montenegro	7,721,333	6,737,162
	Croatia	2,048,664	2,001,954
	Bosnia and Herzegovina	1,559,990	1,604,858
	Australia	737,601	865,578
	USA	527,054	805,427
	Canada	229,739	399,855
	Switzerland	249,020	334,876
	Albania	160,769	91,170
	Romania	313,950	65,549
	Bulgaria	276,376	57,951
	New Zealand	13,654	23,327
	Russia	19,680	16,728
	Norway	15,272	14,963
	Sudan	8,724	14,782
	Congo	3,763	6,098
	NATO	2,684	2,583
	Portugal	306	635
	Malta	205	374
	Slovakia	94	131
Non EU Total		13,888,878	13,044,000
EU	Germany	2,893,227	2,621,534
	Greece	2,871,485	1,553,475
	Austria	721,649	914,674
	France	825,561	889,159
	Slovenia	873,386	878,293
	Italy	286,962	807,919
	Holland	611,868	675,038
	Sweden	285,944	657,978
	Belgium	1,175,348	611,780
	Poland	821,988	489,505
	Hungary	327,230	303,930
	Great Britain	24,895	37,360
	Croatia	25,068	19,566
	Cyprus	1,332	3,269
EU Total		11,745,942	10,463,481
Grand Total		25,634,820	23,507,481

Table: Export by tariff number, value and quantities in 2006

Tariff Group	Quantities (in kg.)	Value (in €)
2005	6,378,135	7,875,729
2001	5,469,262	4,711,851
0811	2,643,740	3,535,595
0710	5,397,805	2,662,234
2008	1,462,367	1,757,511
2007	1,519,093	586,464
2002	509,134	417,958
2004	318,302	382,870
0712	128,964	303,125
0711	305,399	223,886
0812	336,395	198,925
0713	339,677	192,455
200600	212,696	171,656
200971	217,046	141,088
2003	28,757	140,278
0813	77,366	103,436
210320	101,281	89,386
0714	188,950	12,742
200950	450	294
Grand Total	25,634,820	23,507,481

Table: Export by country, value and quantities in 2007

EU	Country	Quantities (in kg.)	Value (in €)
EU	Germany	5,282,020	3,939,093
	Belgium	2,392,181	1,497,879
	Italy	446,812	1,384,879
	Slovenia	988,764	1,371,051
	Austria	1,227,601	1,326,910
	Greece	2,447,771	1,272,921
	Holland	1,313,899	1,176,576
	Poland	1,084,114	723,862
	France	555,096	583,827
	Hungary	449,004	483,053
	Bulgaria	599,508	380,543
	Sweden	94,052	129,022
	Cyprus	41,703	74,475
	Romania	37,776	53,413
	Great Britain	26,993	49,647
	Denmark	21,430	15,788
	Spain	423	1,736
EU Total		17,009,147	14,464,673
Non EU	Serbia	6,016,630	5,234,633
	Croatia	2,143,117	2,232,241
	Montenegro	1,471,166	1,738,132
	Bosnia and Herzegovina	1,561,094	1,600,871
	Australia	863,288	1,156,044
	USA	663,842	801,897
	Canada	228,876	423,799
	Switzerland	235,454	334,225
	Albania	74,329	47,400
	Sudan	10,149	16,821
	Norway	5,357	7,918
	Costa Rica	21,600	6,361
	Turkey	3,024	6,229
	Surinam	15,444	5,126
	Namibia	1,974	1,546
	Iraq	1,123	1,383
Non EU Total		13,316,468	13,614,625
Grand Total		30,325,615	28,079,298

Table: Export by tariff number, value and quantities in 2007

Tariff Group	Quantities (in kg.)	Value (in €)
2005	5,924,919	7,816,209
2001	6,845,934	6,044,527
0710	8,302,005	5,076,279
0811	3,223,713	3,100,755
2008	1,416,474	1,597,350
2004	911,024	1,263,333
2007	1,388,068	619,853
0711	402,025	285,152
200600	311,354	250,281
0712	101,469	242,029
2003	85,650	221,113
2002	202,848	165,094
0812	152,959	163,669
200971	251,225	154,838
0713	110,057	91,858
210320	128,011	84,161
0813	36,828	67,600
0714	13,200	3,620
200950	1,418	1,627
Grand Total	29,809,181	27,249,350