



Cucumber market profile - 2006

Introduction

Cucumber is the third most cultivated vegetable crop produced in greenhouses after tomatoes and peppers. It is the first fresh vegetable to come onto the market – with the exception of lettuce – an all-year-round crop. Cucumber is one of the most profitable vegetables.

The crop is grown in both greenhouses) and the open field And production is dedicated for the fresh market and processing (industrial and household).

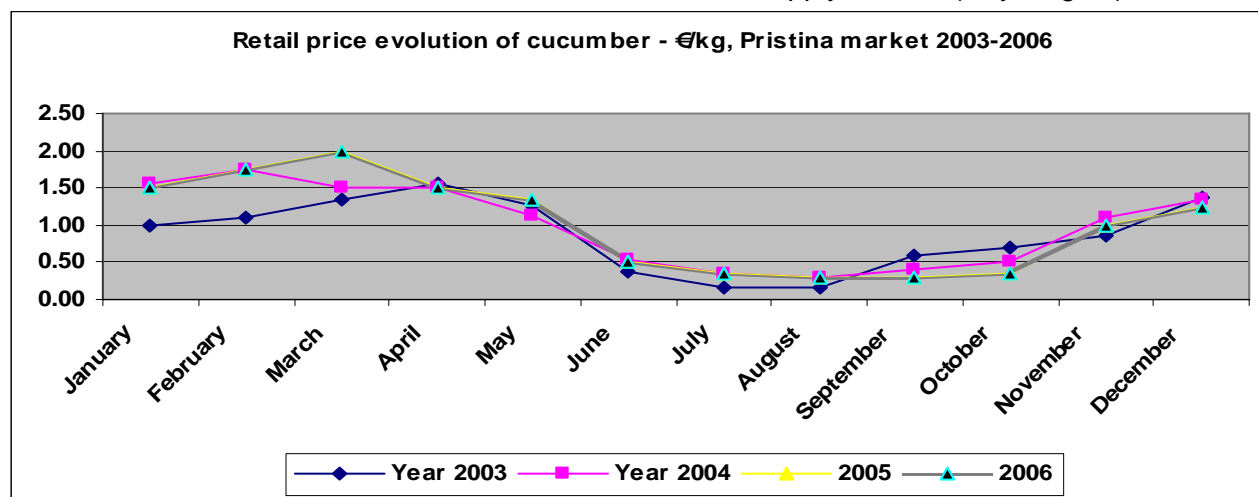
Market size

The total market volume of cucumbers in Kosovo in 2006 is estimated at 28,259 tonnes¹. This is based on an official estimate of local production amounting to 22,886 tonnes² and records of imports of 5,373 tonnes³. Local production of cucumber, according to these figures, represents approximately 80% of the total market share by volume.

Cucumbers are present in Prishtina market throughout the year. Demand is very high in two periods – (i) May and June as the main early fresh salad crop and (ii) the pickling season September - October.

Retail prices - Pristina market

Retail prices tend to hover between €1.50-2.00/kg in the off season (November to April) and descend to their minimum of around €0.30 in the full Kosovo supply season (July-August).



Source: "Monitorimi"- weekly price monitoring, SPHPK/Intercooperation

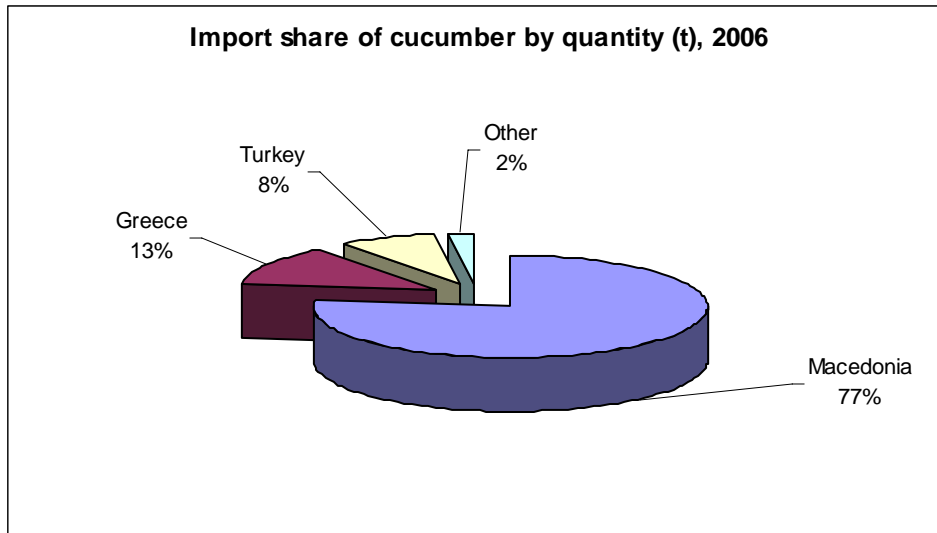
¹ Sum of import & local production

² MAFRD - calculated from estimates of area and of yield by municipal offices. No distinction was made between commercial and non-commercial production. This data includes open field, indoor and cucumbers for processing

³ UNMIK Customs Service

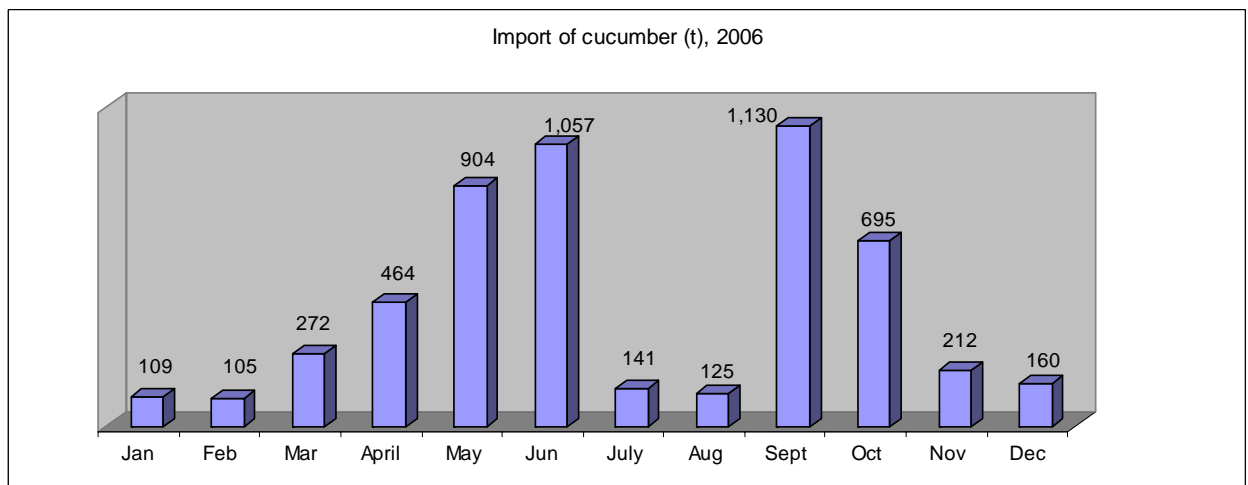
Import

Customs data indicate that 5,373 tonnes of cucumbers were imported in 2006 with a declared value⁴ of €1,214,268. By far the most imports originate from Macedonia with 77% followed by Greece with 13% and Turkey with 8% - as illustrated in the following figure.



Source: UNMIK Customs Service

Import of cucumbers by month



Source: UNMIK Customs Service

The highest import of cucumber occurs during May and June when this vegetable is consumed fresh. Imports fall during July and August when local production is high. Imports again dominate; in September and October when demand increases due to pickling. Cornichons are main type imported during the pickling season.

Origin of cucumbers offered in Kosovo market by months

The main source countries of imported cucumbers by month are presented in the following table.

Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec
Tr,Gr	Tr,Gr	Tr,Gr	Tr,Gr,Mc	Mc,Ks,	Mc,Ks,	Ks,Mc	Ks,Mc	Ks,Mc	Ks,Mc	Tr,Gr	Tr,Gr

Abbreviations: Tr-Turkey, Mc-Macedonia, Ks-Kosovo, Gr-Greece,

⁴ The declared value is the value declared by importers (traders) based on the invoice of the imported goods.

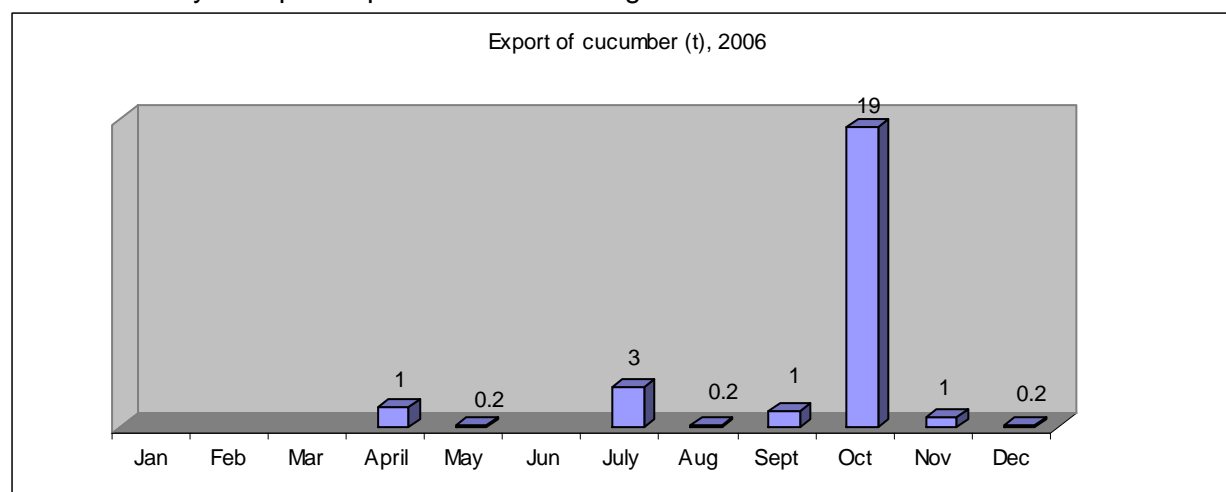
Source: “Monitorimi”- weekly price monitoring, SPHPK/Intercooperation

The market is dominated by imports during the off-season period of November – May. The first local production appears in the first week of May from greenhouses while harvest from the open field commences in June. Imports during the off-season are predominantly from Turkey and Greece, while the source switches to Macedonia during the early season. This pattern can be explained by the earlier growing conditions in these countries compared to Kosovo.

Export

26 tonnes of cucumbers were exported with a declared value of €2,877 - all to Montenegro.

The seasonality of export is presented in the diagram below.



Source: UNMIK Customs service 2006

The export recorded in April, November and December appears to be re-export since the crop is unavailable from local sources at these times.

Local production

Based on official MAFRD data in 2006, the total area under cucumber production⁵ is estimated at 692.6 ha and the average yield at 33t/ha⁶. The total cucumber production according to these figures amounts to 22,886 tonnes as presented below:

Type	Area (ha)	Yield t/ha	Production (t)
Open field	532.4	32.7	17,427
Indoor	43.3	49.8	2,155
Processing	116.9	28.3	3,304
Total	692.6		22,886

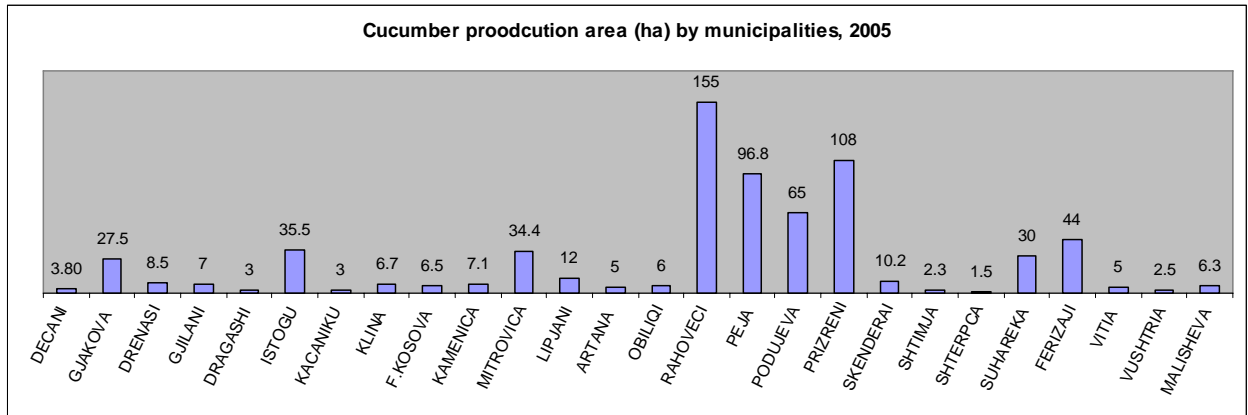
Source: MAFRD-Office of Agricultural Statistics

According this table open field production of cucumber dominates while the greenhouse production is still very low – as is the field production of gherkins.

The production area of cucumbers is concentrated in the municipalities of Rahovec (with 155 ha), Prizren (108 ha) and Peja (96 ha).

⁵ Includes: open field, indoor and cucumbers for processing.

⁶ SPHPK - calculation.



Product differentiation

Two broad types of cucumbers are marketed – the salad type (from greenhouse and open field) and the processing types – gherkins which are dedicated for industrial and home made processing.

Salad type – is mainly eaten fresh or used in the preparation of different types of salads. It is mainly used by households and restaurants. This type compared to pickling is usually longer, smooth rather than bumpy and has more uniform green skin colour compared to the pickling types. A new type has recently arrived in the local market – imported from Turkey – smaller than the common salad type and light green.

Pickling cucumbers are usually named according to their size or the way in which they are prepared. Gherkins are usually blunt and light green in colour with a length typically 8 -10 cm. Cornichons, however, are smaller - approximately 5 cm and are sold when not fully developed. They are generally pickled in vinegar. This type of cucumbers is dedicated for home made and industrial processing.

Cucumber marketing channels

The three basic alternatives are available to the cucumber growers ie (i) roadside stands or direct marketing, (ii) local retailers (grocery shops) - retail marketing, and (iii) wholesale markets. The main characteristics of these channels are described below:

1: Direct marketing channel – roadside stands - marketing directly to consumers provide opportunities for farmers to receive higher prices for their products than wholesale prices, but this type may have additional costs – staying for long time of farmers at the market which includes more costs (e.g. food and other costs). It tends to be the favoured channel for small and middle growers. This channel covers around 60% of the supply of cucumbers in Kosovo⁷.

2: Retail channel – a form of indirect marketing in which the growers deals directly to a retailer such as a retail shop, greengrocery and supermarket. This channel is used by small and medium growers. The channel covers around 20 % of supply of cucumbers in Kosovo.

3: Wholesale channel – This is the third alternative for the cucumbers growers - wholesale channel. Approximately 10% of cucumbers sales are made through wholesalers. These channels supply 100% of cucumbers during the out of season supply October - April.

⁷ Rough estimation IC -SPHPK

Comments

There appears to be scope to increase production and substitute for imports covering April – May (early season) and September – October (pickling season). Imports during these two periods during 2006 amounted to 3,785 tonnes representing a value of € 726,160.

Recommendations

- Promoting the both the early and late production of cucumbers in order to substitute for imports.
- Promoting new early salad and gherkins cultivars.

References and resources

- *Monitorimi – Weekly price monitoring SPHPK*
- *MAFRD – Office of Agricultural Statistics*
- UNMIK Customs Service