

Import - Export of fresh fruit & vegetables 2006

Pristina, May 2007



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Summary

Approximately 80,000 tonnes of temperate fresh fruits and vegetables¹ were imported into Kosovo in 2006 with a declared value of €17.4 million. Import of fresh temperate fruits represented 46.5% of the total volume by weight and 38 % of the total declared value. The import of fresh temperate vegetables represents 53.5% of the total volume by weight and 62% of the total declared value.

The import of temperate fruit increased by 11% over 2005 while the figure for vegetables was 1%.

2,669 tonnes² of fresh fruits and vegetables were exported with a declared value of €374,745. Vegetables represented more than 80 % of the total in terms of weight and value.

The export of fresh fruit increased by an impressive 1,139% over 2005 while that of vegetables increased by 134% - both, however, from a very low base.

Watermelon and apples were the two most imported fruit in 2006 in terms of weight with watermelon representing 55% and apples 29%.

The five most important vegetable imports – in order of importance by weight were tomatoes at 40%, peppers 18%, cabbage 13%, cucumbers 12% and onions 9%.

The two most exported fruit were watermelon at 59% and grapes with 30%. The main exported vegetables were cabbages at 43%, onions 37%, peppers 10% and tomatoes 8%.

The main countries exporting fresh temperate fruit to Kosovo are Macedonia (with 67% by weight) and Albania (18%) - while Turkey and Macedonia accounted for more than 80% of total imports of fresh temperate vegetables.

The main importing countries of fresh temperate fruits from Kosovo by weight were Romania (with 46%) and Montenegro (38%) while, for vegetables Montenegro accounted for 76% and Albania 22%.

Acknowledgment

The import and export data for 2006 were received directly from the UNMIK Customs Service. Previously such Customs data was received via other channels (e.g. MAFRD³, EAR projects⁴).

We would like to thank the staff of UNMIK Customs Service for their collaboration and support in supplying this information which is of considerable importance in the promotion of the horticulture sector in Kosovo.

¹ Fresh fruits and vegetables which could be grown in Kosovo

² Some of the produce are re-exports, because some or exports were recorded during the period when is not possible to be produced locally.

³ Ministry of Agriculture, Forestry and Rural Development.

⁴ European Agency for Reconstruction

Introduction

This document presents an analysis by the Swiss Project for Horticultural Promotion, Kosovo, (SPHPK) of import and export data, collected by the UNMIK Customs Service, of fresh temperate fruit and vegetables in Kosovo in 2006. This is the third annual analysis of such data.

The understanding from these analyses is used by SPHPK in elaborating and refining strategies for product and marketing development with a view of promoting the substitution of imports and, eventually, the promotion of exports of temperate horticultural produce.

The document covers temperate fruits and vegetables (ie those that could be grown locally) under the TARIK⁵ custom codes 07 and 08. It includes the following:

Fruits:

- table grapes (but not wine), watermelons, melons, apples, pears, apricots, cherries, nectarines, peaches, plums, strawberries, raspberries, blackberries, and

Vegetables:

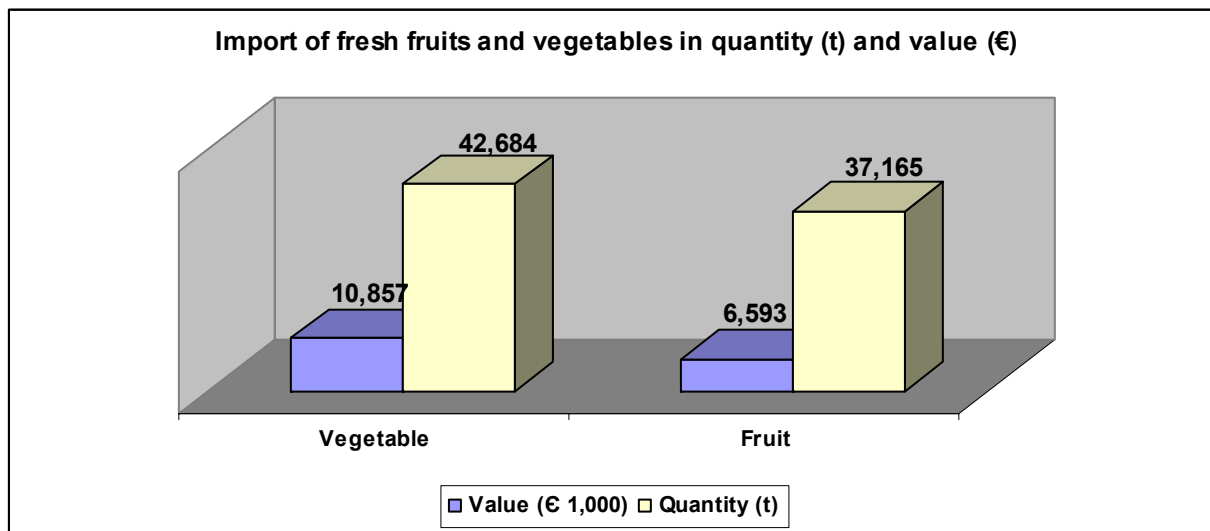
- Tomatoes, onions, garlic, leeks, cauliflower, cabbage, lettuce, chicory, carrots, celery, horse radish, cucumbers, gherkins, peas, beans, artichokes, asparagus, aubergine, celery, peppers, spinach.

This document also includes trend analyses of import and export for certain key products comparing the data of 2005 and 2006. The data for 2004 have not been included in the comparative analysis in order to avoid any major errors that might have resulted from any teething problems during the first year of operation.

⁵ The integrated tariffs of Kosovo utilises a nomenclature of goods (codes and description) based on the Harmonised System of the World Customs Organisation (WCO) and on the Combined Nomenclature of the European Communities, as applicable on 1 January 2006.

International trade in fruits and vegetables

Total imports of temperate fruits and vegetables in 2006 amounted to 79,850 tonnes - with a declared value⁶ of €17,450 million. The breakdown between fruits and vegetables is presented in the figure below. Total exports amounted to 2,670 tonnes - mainly vegetables with a declared value of €373,745.



Source: UNMIK Customs service 2006

Difference in trade

Both import and export of fresh fruits and vegetables increased in 2006 compared to 2005. The imports of fresh fruit increased by 11.2% while the import of fresh vegetables increased by 1.5%.

The export of vegetables increased by 134%, while the export of fruits by 1,139% - albeit all from a very low base.

Import

	2005 (t)	2006 (t)	Difference(t) %
Vegetable	42,040	42,684	1.5
Fruit	33,428	37,165	11.2

Export

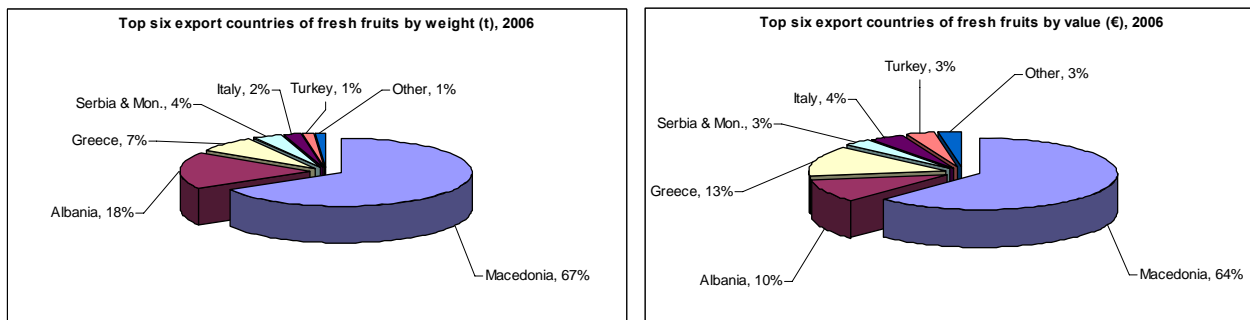
	2005 (t)	2006 (t)	Difference(t) %
Vegetable	965	2,260	134
Fruit	33	409	1,139

⁶ The declared value is the value declared by importers (traders) based on the invoice of the imported goods.

Fresh fruit

Import

37,165 tonnes of fresh temperate fruit – with a declared value of €6,59 million were imported – 67% in terms of quantity from Macedonia alone. The relative importance of imports from the main countries of origin is presented in the following diagrams.

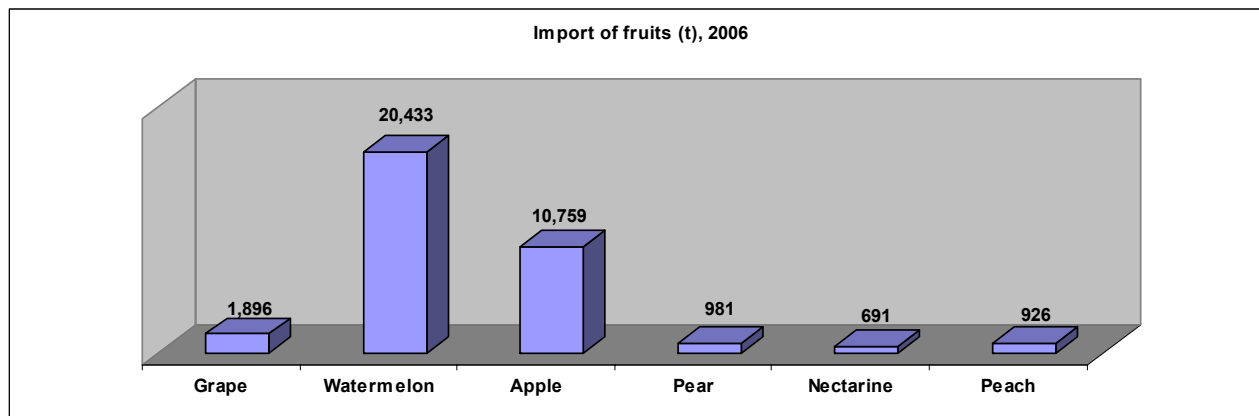


Source: UNMIK Customs service 2006

The top six exporters of fresh fruits in terms of quantity and declared value are presented in the following table:

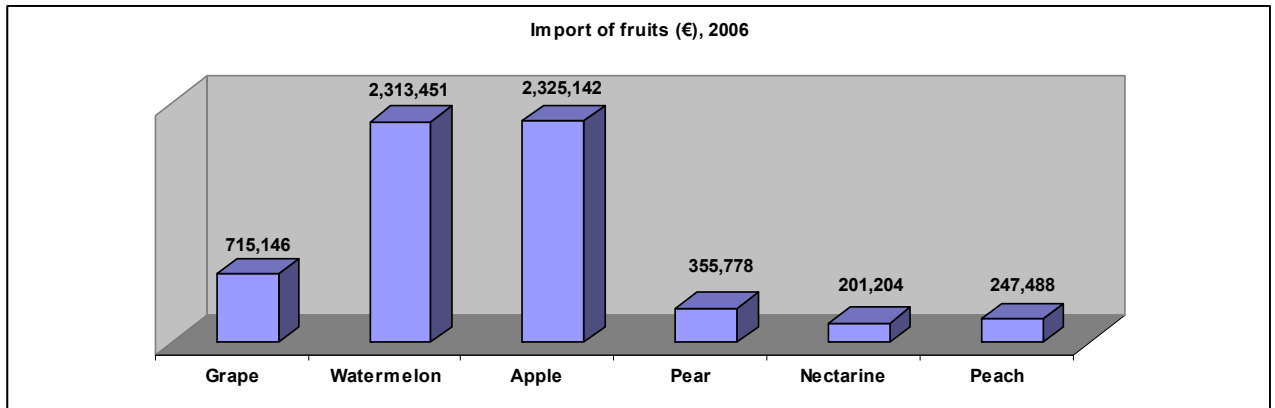
Country	Quantity (t)	Value (€)
Macedonia	24,651	4,125,990
Albania	6,660	675,295
Greece	2,678	889,614
Serbia & Mon.	1,332	227,185
Italy	833	280,937
Turkey	484	203,270

The quantities of the individual fruits imported are presented graphically below.

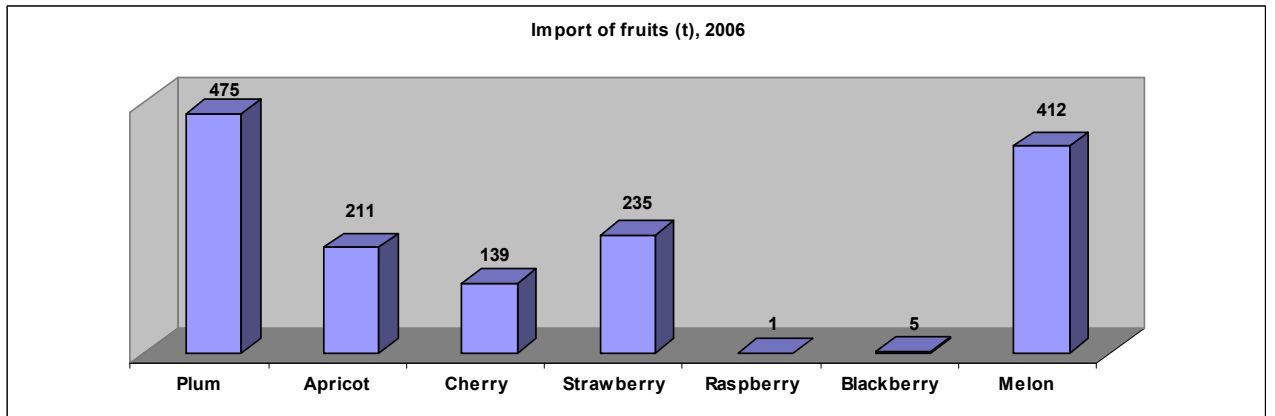


Source: UNMIK Customs service 2006

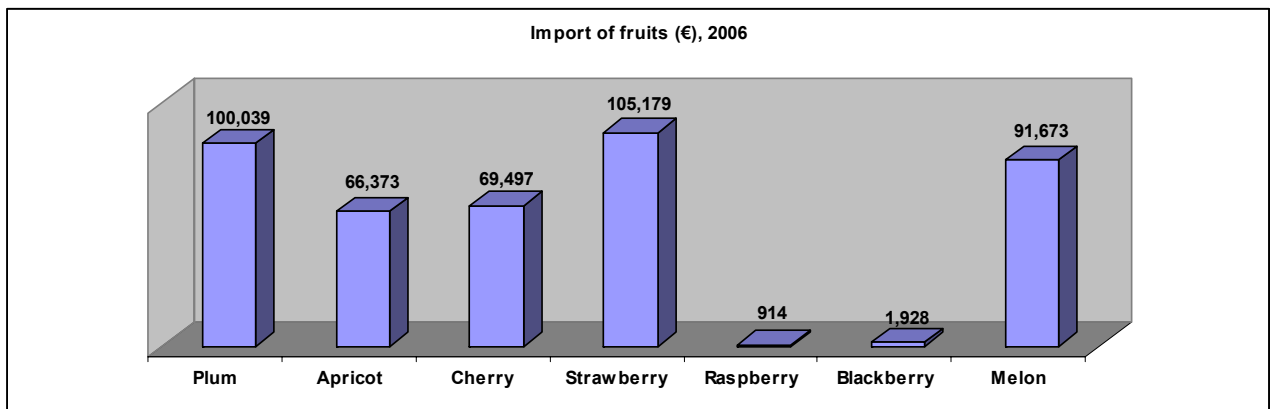
Watermelon is the main import in terms of weight, while watermelon and apples are the joint most important in terms of declared value (at around 2.3m € each).



Source: UNMIK Customs service 2006



Source: UNMIK Customs service 2006

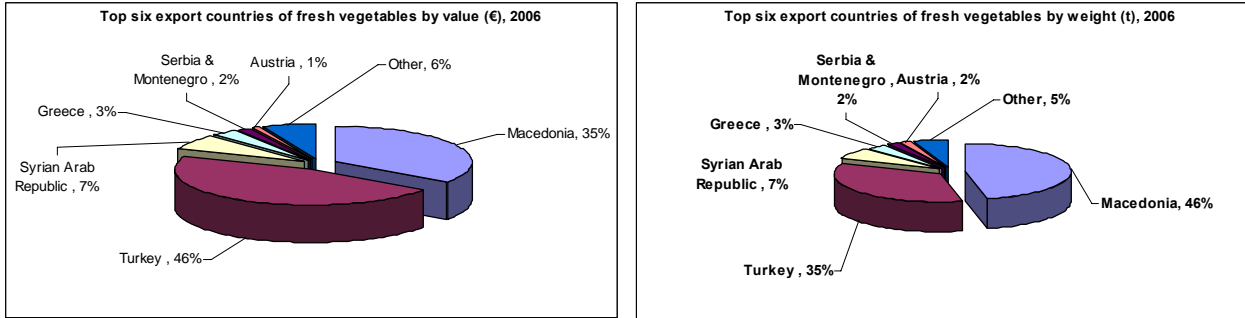


Source: UNMIK Customs service 2006

Fresh vegetables

Import

42,684 tonnes of fresh temperate vegetables with a declared value of €10,8 million were imported – Macedonia and Turkey representing more than 80% of the total weight. The imports from the main exporting countries are presented in the diagrams below.

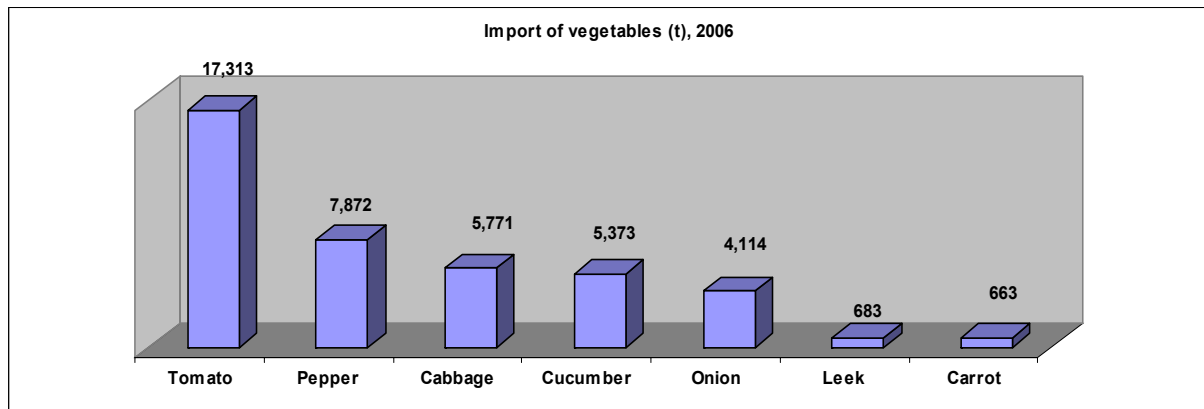


Source: UNMIK Customs service 2006

The six top exporters of fresh vegetables in terms of quantity and a declared value are presented in the following table:

Country	Quantity (t)	Value (€)
Macedonia	19,946	3,759,218
Turkey	14,806	5,004,943
Syria	2,852	764,824
Greece	1,326	361,016
Serbia & Mont.	806	184,728
Austria	737	77,511

The quantities of the individual vegetables imported are presented in the following two histograms.

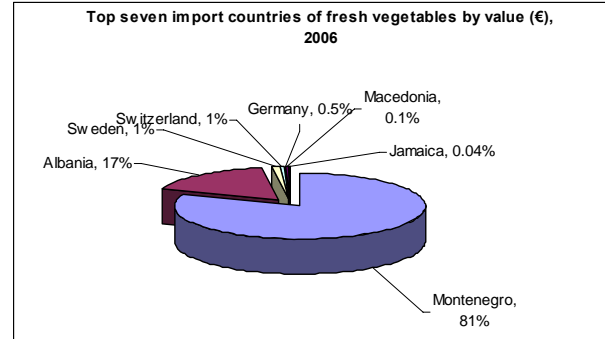
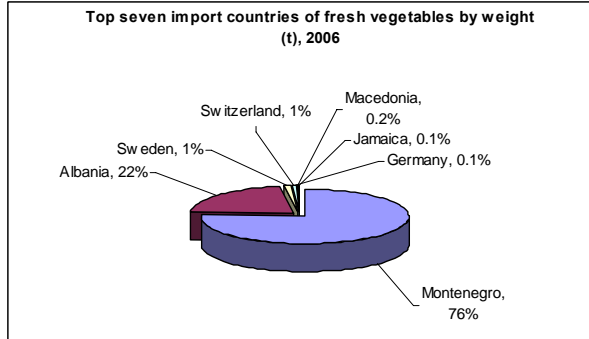


Source: UNMIK Customs service 2006

Tomatoes were the most imported fresh vegetables during 2006, followed by peppers, cabbage, cucumber and onions.

Export

2,260 tonnes of fresh temperate vegetables were exported with total declared value of €325,791 – the most important being cabbages, onions, peppers and tomatoes. Montenegro is the main importing country with 76% of total export by weight.

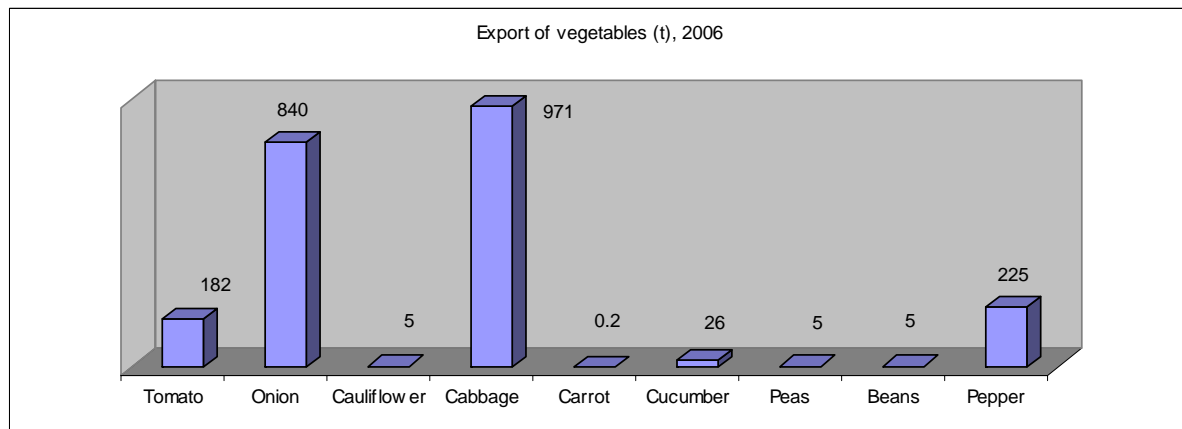


Source: UNMIK Customs service 2006

The main importers of fresh temperate vegetables from Kosovo in terms of quantity and declared value are presented in the following table:

Country	Quantity (t)	Value (€)
Montenegro	1,713	263,130
Albania	499	55,524
Sweden	21	3,150
Switzerland	16	1,871
Germany	3	1,513
Macedonia	5	478

The quantities of the individual fresh vegetables exported are presented in the following histogram.

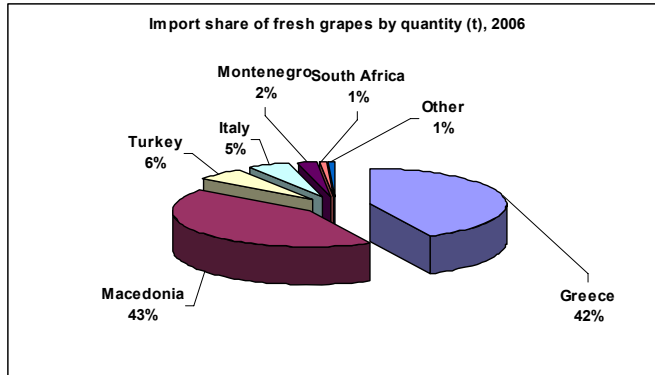


Source: UNMIK Customs service 2006

Import of individual temperate fruits

Grapes

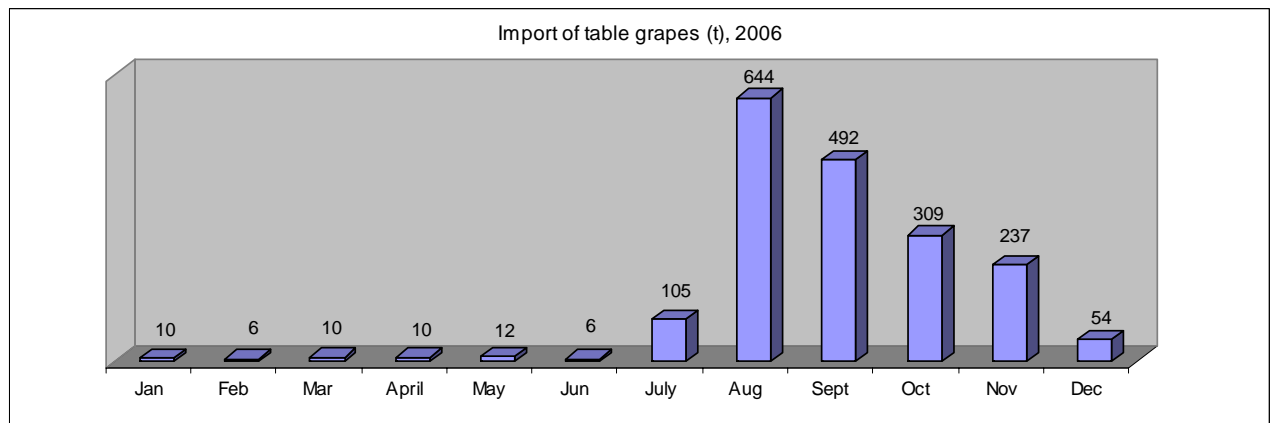
1,896 tonnes of table grapes were imported with a declared value of €716,146 – 85% by weight from Macedonia and Greece.



Country	Quantity (t)	Value (€)
Greece	810	305,335
Macedonia	808	284,974
Turkey	109	47,048
Italy	94	47,946
Montenegro	46	13,849
South Africa	16	8,948

Source: UNMIK Customs service 2006

The seasonality of imports of table grapes is presented graphically below by month:



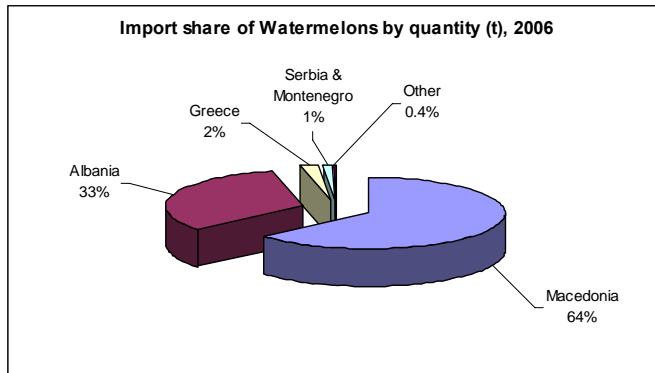
Source: UNMIK Customs service 2006

Import of table grapes decreased by 42 % compared to the previous year.

	<u>2005</u>	<u>2006</u>	
Grape	Quantity (t)	Quantity (t)	Change %
	3,278	1,896	-42

Watermelons

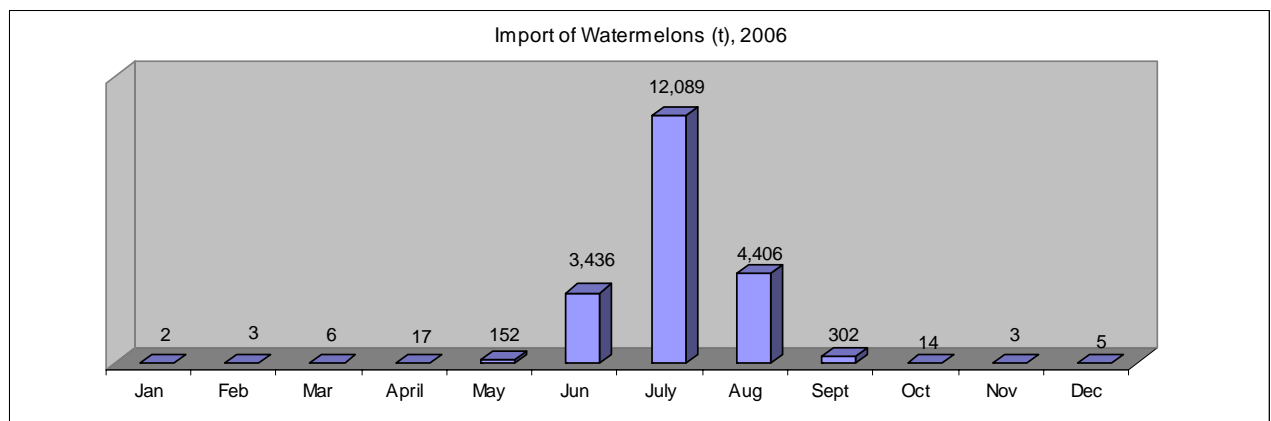
20,433 tonnes of watermelons were imported with a declared value of €2,313,450 - 64% by weight from Macedonia alone.



Country	Quantity (t)	Value (€)
Macedonia	13,069	1,444,022
Albania	6,650	672,679
Greece	418	144,211
Serbia & Mon.	219	16,735

Source: UNMIK Customs service 2006

The seasonality of imports of watermelons is presented graphically below by month:



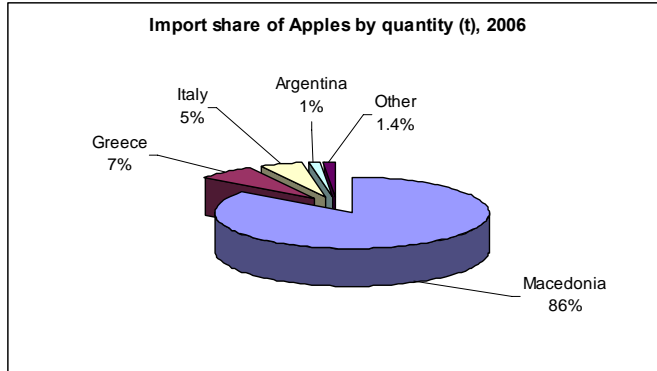
Source: UNMIK Customs service 2006

Import of watermelon increased by 50 % compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
	Quantity (t)	Quantity (t)	
Watermelon	13,592	20,433	+50

Apples

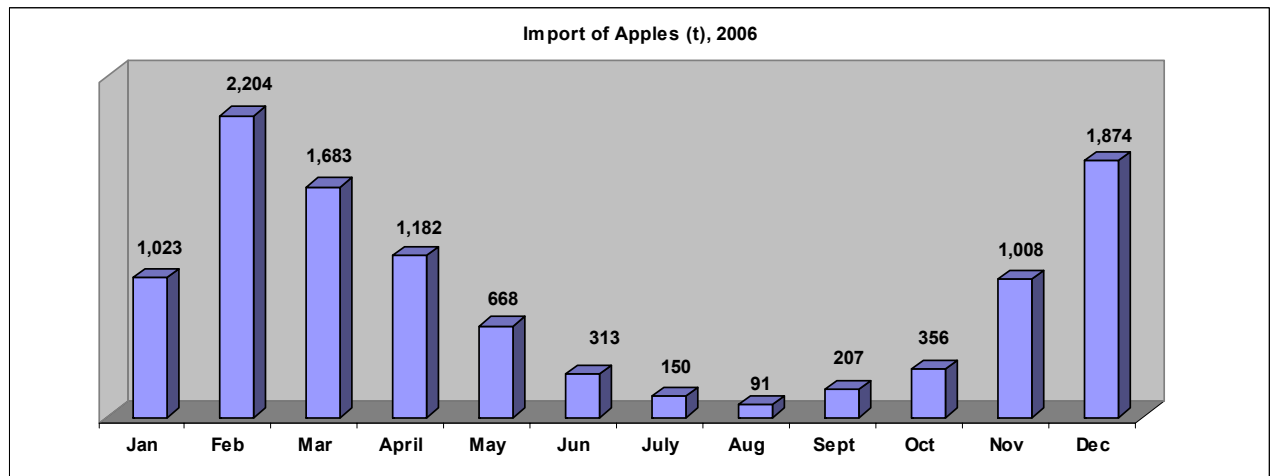
Import data shows that 10,759 tonnes of apples were imported, amounting to a declared value of €2,325,142 – 86% by weight from Macedonia alone.



Country	Quantity (t)	Value (€)
Macedonia	9,167	1,900,157
Greece	760	185,782
Italy	524	153,595
Argentina	157	43,211
Other	151	42,398

Source: UNMIK Customs service 2006

The seasonality of imports of apples is presented graphically below by month:



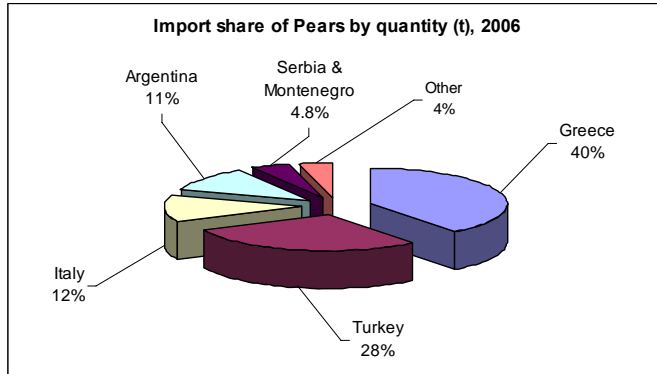
Source: UNMIK Customs service 2006

Import of apples fell by 8 % compared to the previous year.

	<u>2005</u>	<u>2006</u>	Change %
Apple	Quantity (t)	Quantity (t)	
	11,716	10,759	-8

Pears

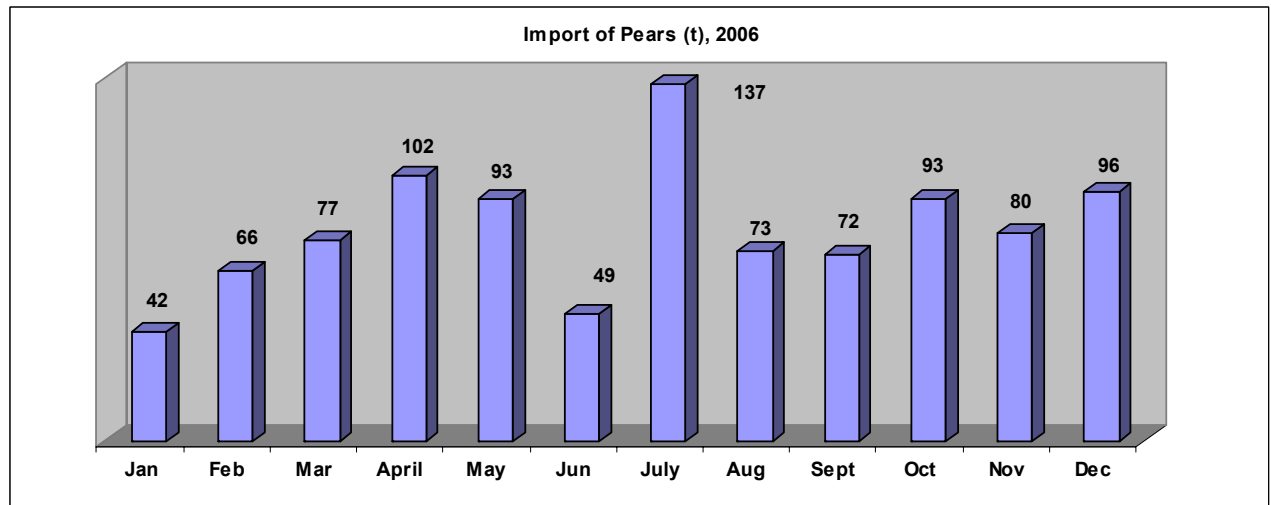
981 tonnes of pears with a declared value of €355,777 were imported – Greece and Turkey representing 68% of the total by weight. The imports from the five main exporting countries are presented in the diagram below.



Country	Quantity (t)	Value (€)
Greece	387	133,907
Turkey	279	110,368
Italy	120	45,295
Argentina	109	44,861
Serbia & Mont.	46	7,260

Source: UNMIK Customs service 2006

The diagram below shows the import of pears by month:



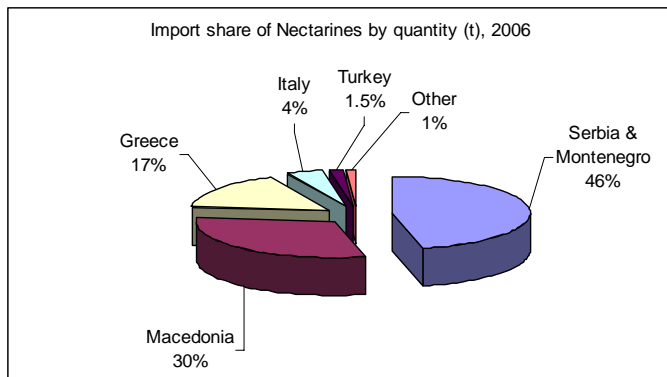
Source: UNMIK Customs service 2006

Import of pears fell by 1 % compared to the previous year.

	<u>2005</u>	<u>2006</u>	
Pear	Quantity (t)	Quantity (t)	Change %
	986	981	-1

Nectarines

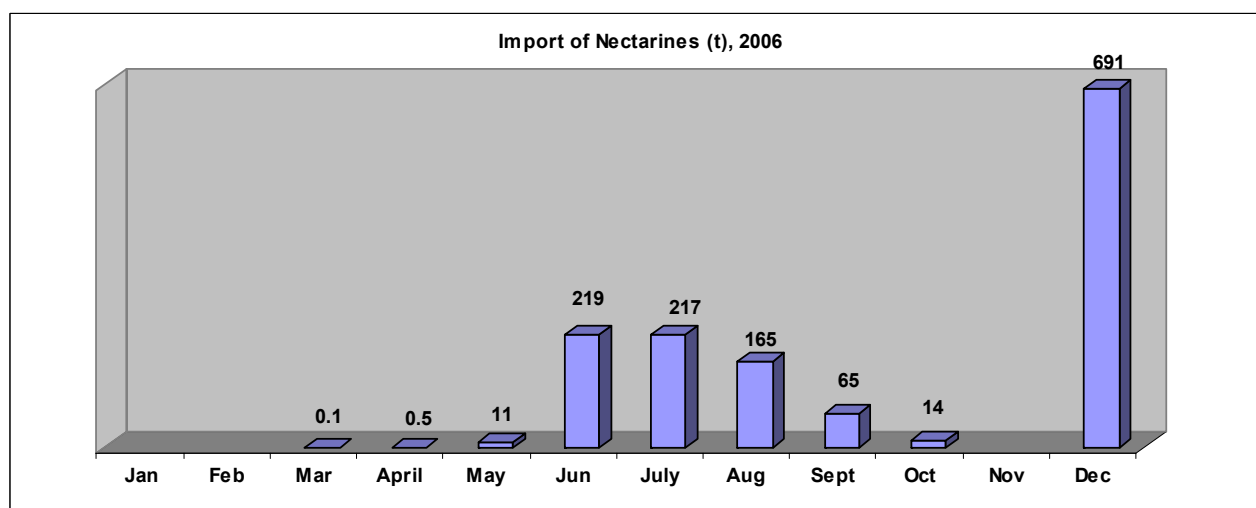
691 tonnes of nectarines were imported amounting to a declared value of €201,203 – Serbia & Montenegro and Macedonia represents 76% of the total by weight.



Country	Quantity (t)	Value (€)
Serbia & Mont.	320	74,146
Macedonia	207	64,593
Greece	116	42,225
Italy	30	11,038
Turkey	11	5,149
Other	7	4,052

Source: UNMIK Customs service 2006

The diagram below shows the import of pears by month:



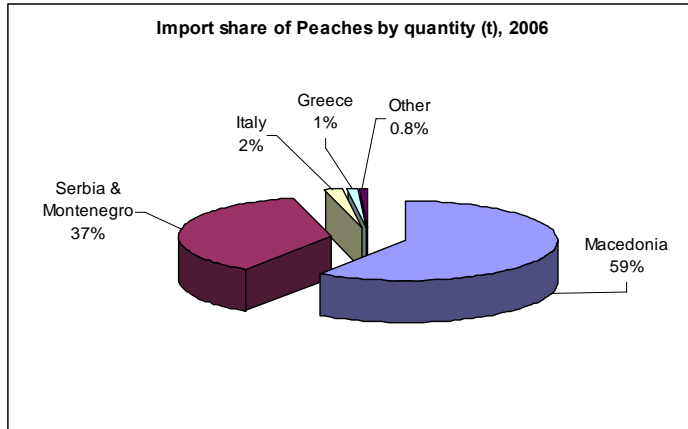
Source: UNMIK Customs service 2006

Import of nectarines fell by 18 % compared to the previous year.

	<u>2005</u>	<u>2006</u>	
	Quantity (t)	Quantity (t)	Change %
Nectarines	844	691	-18

Peaches

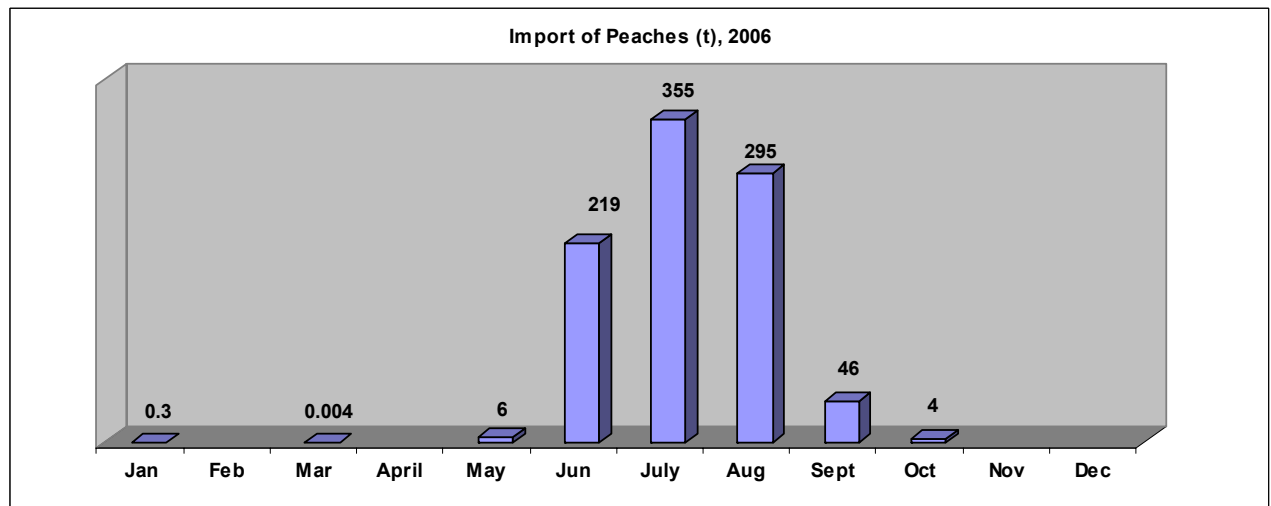
926 tonnes of peaches were imported with a declared value of €247,487 – 59 % by weight from Macedonia alone.



Country	Quantity (t)	Value (€)
Macedonia	551	178,256
Serbia & Mont.	340	55,142
Italy	18	6,509
Greece	10	4,472
Other	72	3,110

Source: UNMIK Customs service 2006

The seasonality of imports of peaches is presented graphically below:



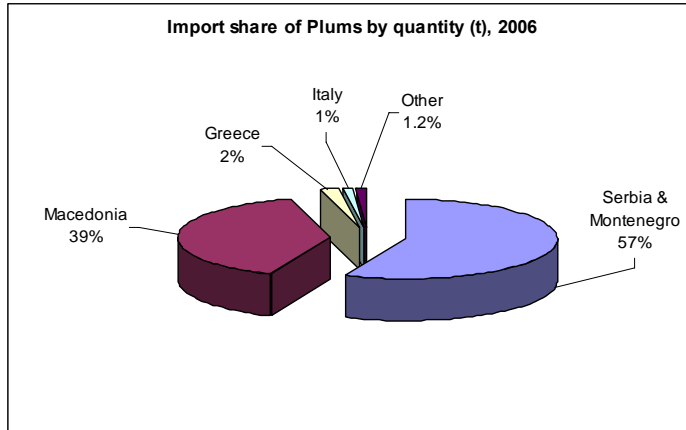
Source: UNMIK Customs service 2006

Import of peaches decreased by 10 % compared to the previous year.

	<u>2005</u> Quantity (t)	<u>2006</u> Quantity (t)	Change %
Peaches	845	926	+10

Plums

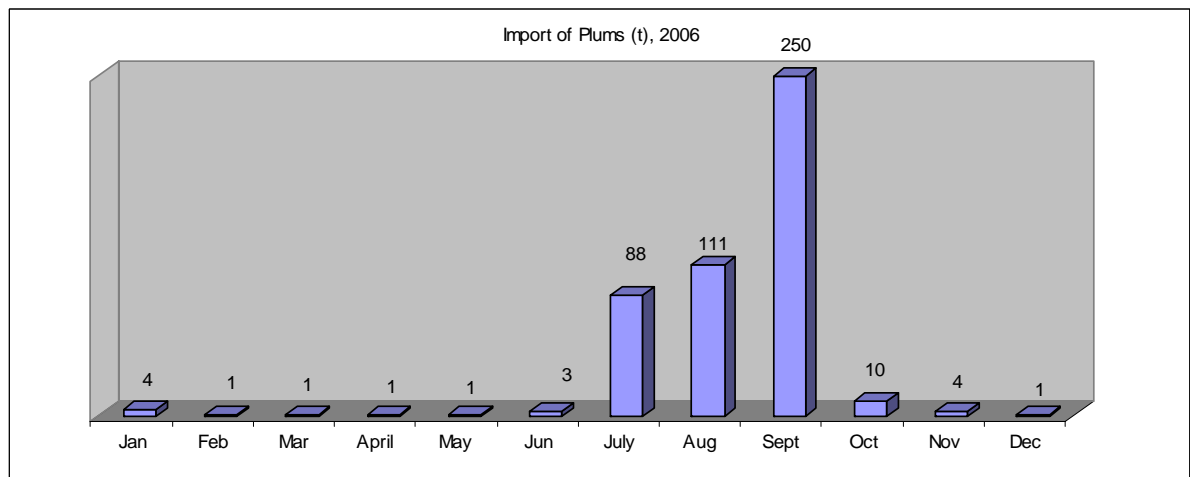
475 tonnes of plums were imported with a declared value of €100,029 – 57% from Serbia alone.



Country	Quantity (t)	Value (€)
Serbia & Mont.	268,9	40,775
Macedonia	187,5	50,533
Greece	8,6	3,395
Italy	5,4	2,926
Other	5,7	2,409

Source: UNMIK Customs service 2006

The seasonality of imports of plums is presented graphically below by month:



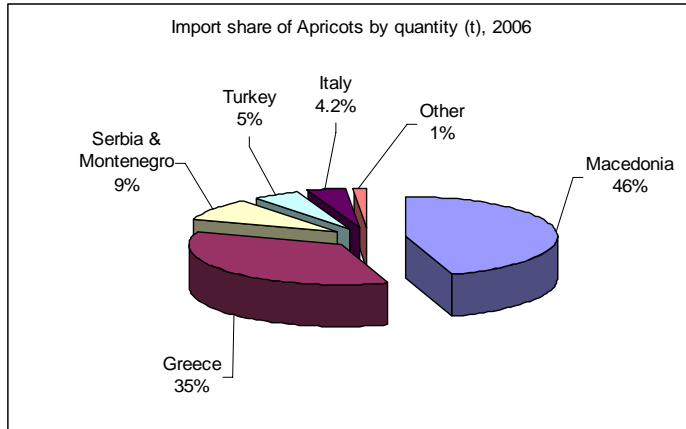
Source: UNMIK Customs service 2006

Import of plums increased by 69% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
Plums	Quantity (t)	Quantity (t)	
	281	475	+69

Apricots

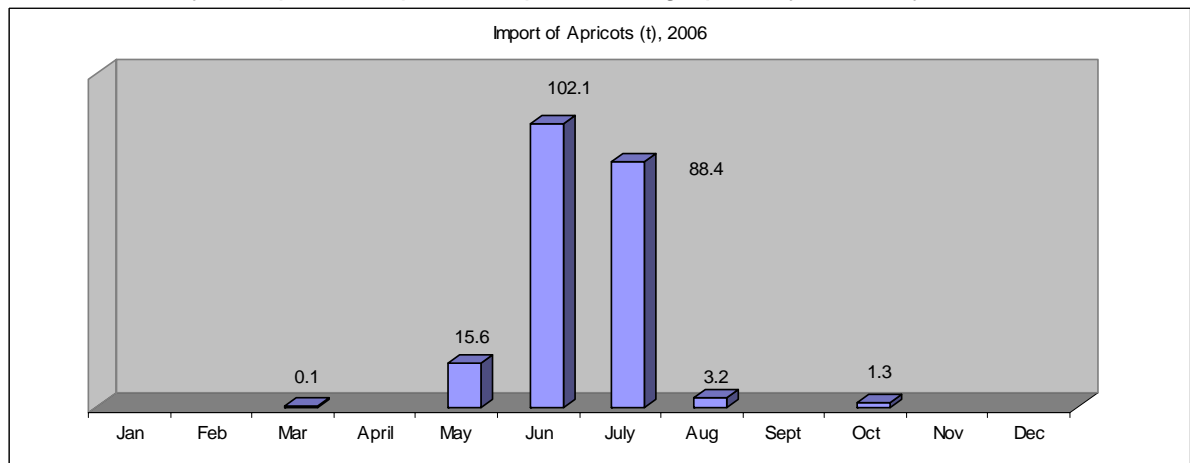
210 tonnes of apricots were imported with a declared value of €66,373 – Macedonia and Greece representing 81 % of total by weight.



Country	Quantity (t)	Value (€)
Macedonia	94,9	26,907
Greece	74,2	27,313
Serbia & Mont.	19,2	2,629
Turkey	10,5	5,501
Italy	8,8	2,945

Source: UNMIK Customs service 2006

The seasonality of imports of apricots is presented graphically below by month:



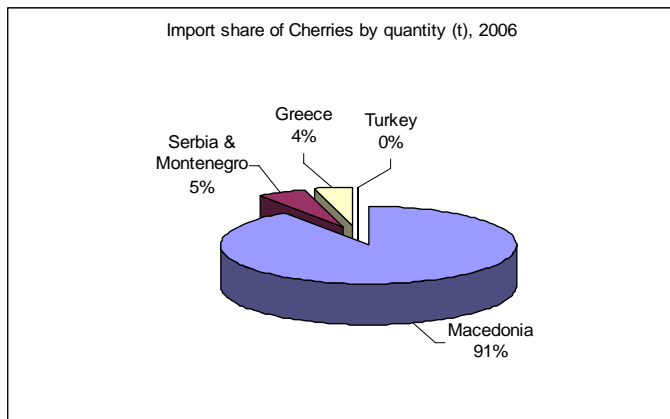
Source: UNMIK Customs service 2006

Import of apricots fell by 30% compared to the previous year.

	<u>2005</u>	<u>2006</u>	
Apricots	Quantity (t)	Quantity (t)	Change %
	299	211	-30

Cherries

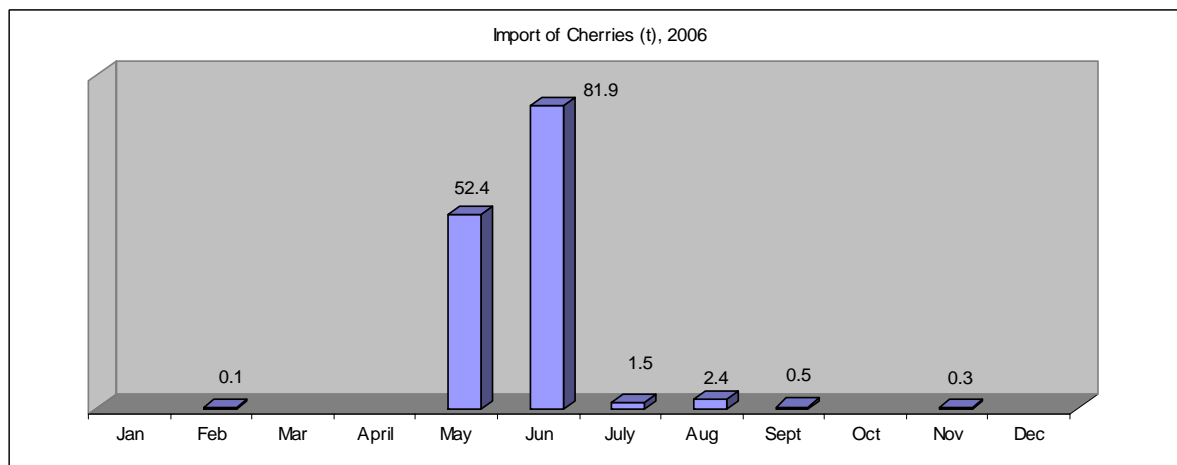
139 tonnes of cherries were imported with a declared value of €69,497 - 91% from Macedonia alone.



Country	Quantity (t)	Declared Value (€)
Macedonia	125,8	62,698
Serbia & Montenegro	7,4	3,450
Greece	5,7	3,292
Turkey	0,1	57

Source: UNMIK Customs service 2006

The seasonality of imports of cherries is presented graphically below by month:



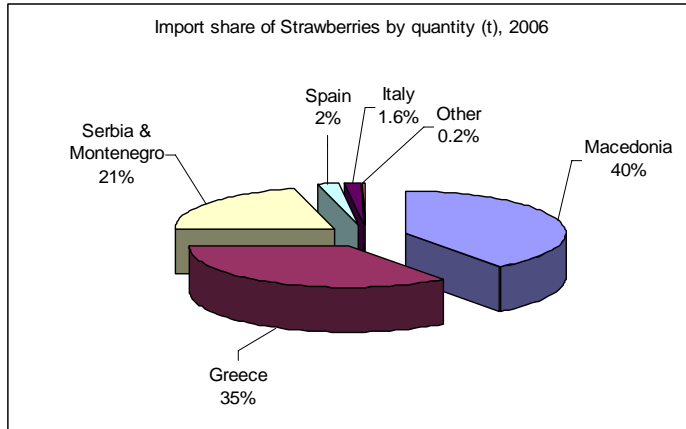
Source: UNMIK Customs service 2006

Import of cherries fell by 22% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
	Quantity (t)	Quantity (t)	
Cherries	178	139	-22

Strawberries

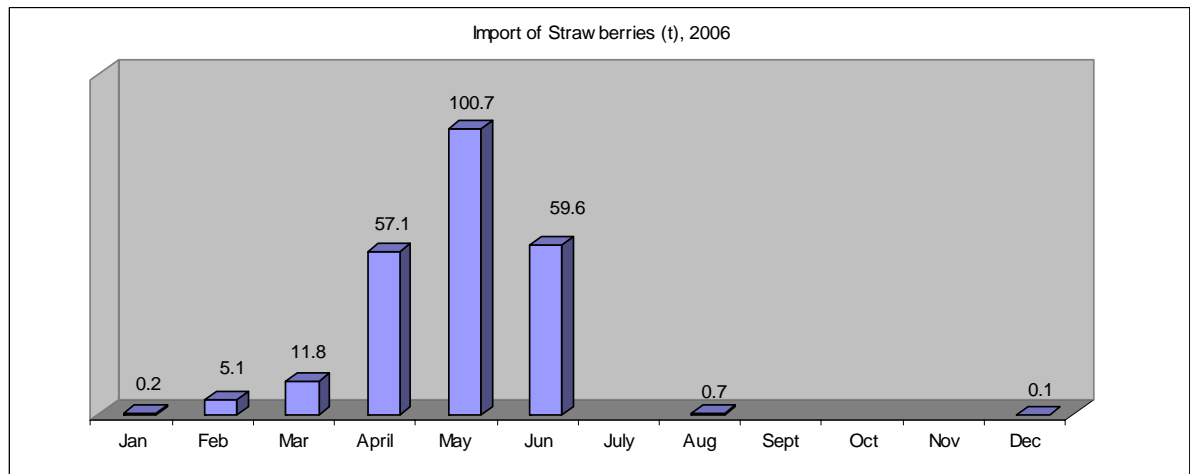
235 tonnes of strawberries were imported with a declared value of €105,179 – Macedonia and Greece representing 75% of total by weight.



Country	Quantity (t)	Value (€)
Macedonia	94	47,854
Greece	83	37,563
Serbia & Mont.	49	14,689
Spain	5	2,908
Italy	4	1,723
Other	0.5	442

Source: UNMIK Customs service 2006

The seasonality of imports of strawberries is presented graphically below by month:



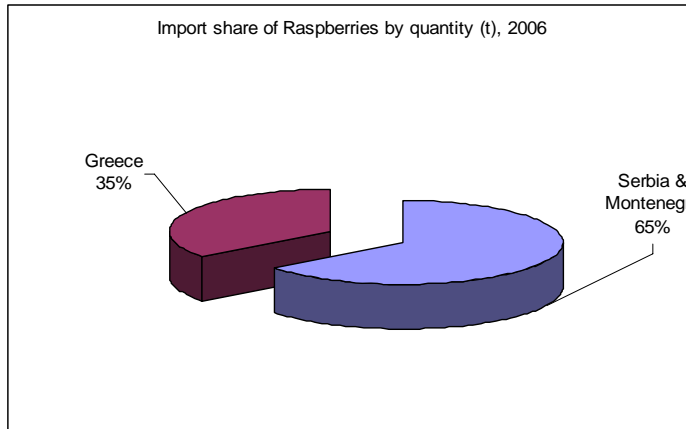
Source: UNMIK Customs service 2006

Import of strawberries fell by 11% compared to the previous year.

	<u>2005</u> Quantity (t)	<u>2006</u> Quantity (t)	Change %
Strawberries	265	235	-11

Raspberries

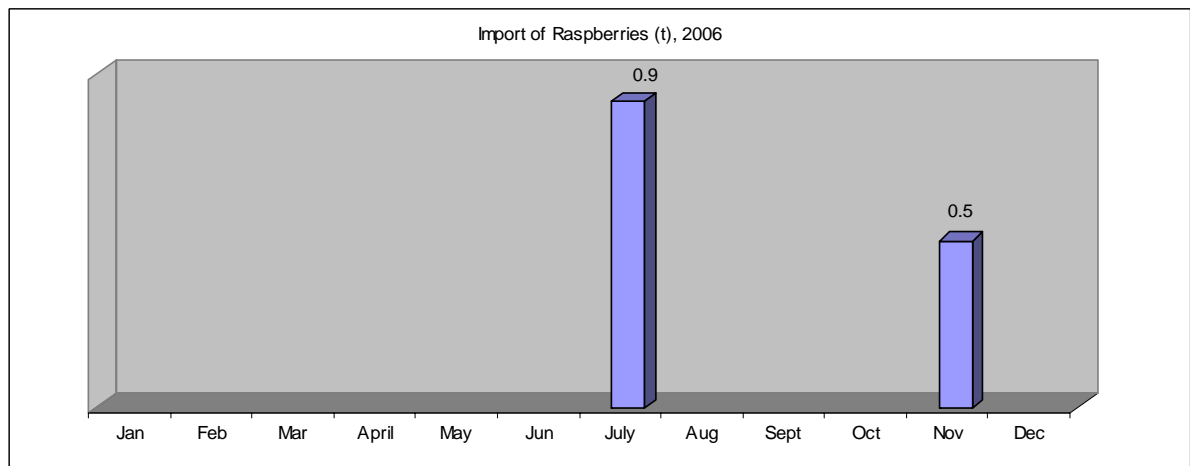
1,420 kg of raspberries were imported with a declared value of €913 – 65% from Serbia & Montenegro alone.



Country	Quantity (kg)	Value (€)
Serbia & Mont.	920	733
Greece	500	181

Source: UNMIK Customs service 2006

The seasonality of imports of raspberries is presented graphically below by month:



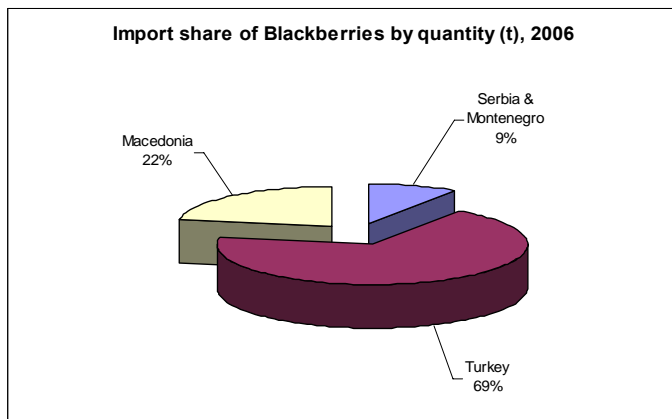
Source: UNMIK Customs service 2006

Import of raspberries increased by 123% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
	Quantity (kg)	Quantity (kg)	
Raspberries	600	1,420	123

Blackberries

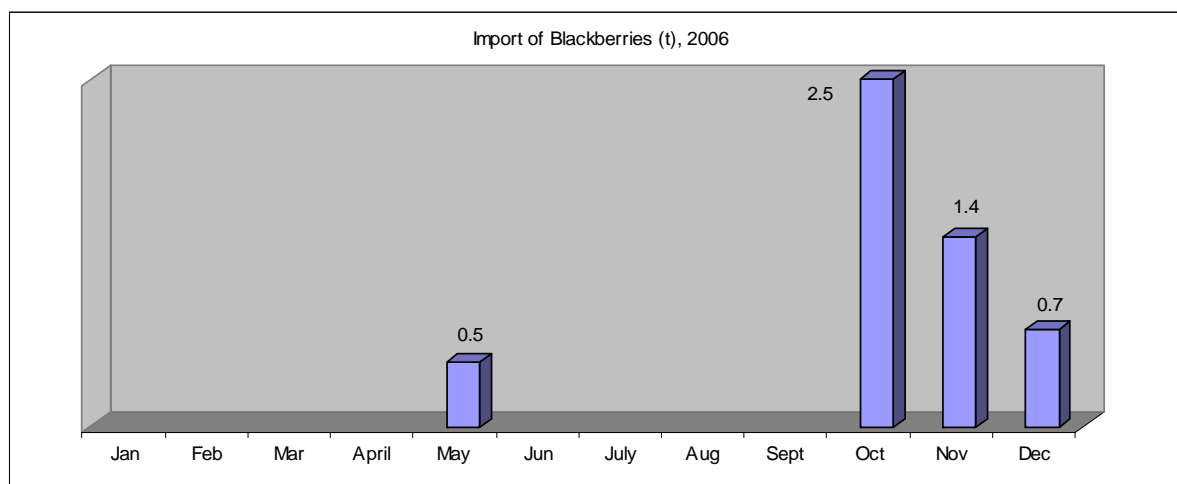
5,000 kg of blackberries were imported with a declared value of €1,928 - 69% from Turkey alone.



Country	Quantity (t)	Value (€)
Serbia & Mont.	0.5	191
Turkey	3.5	1,469
Macedonia	1.1	268

Source: UNMIK Customs service 2006

The seasonality of imports of blackberries is presented graphically below by month:



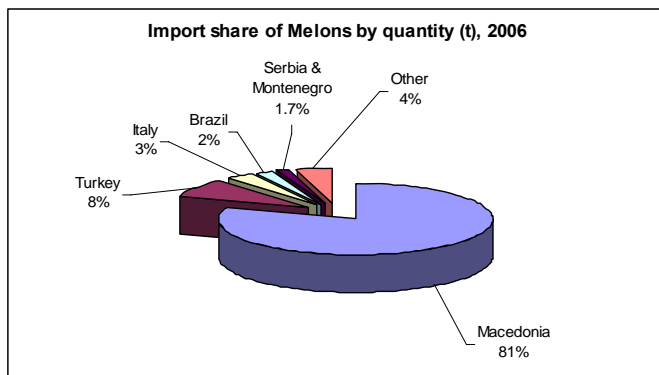
Source: UNMIK Customs service 2006

Import of blackberries increased by 175% compared to the previous year.

	<u>2005</u>	<u>2006</u>	
	Quantity (kg)	Quantity (kg)	Change %
Blackberries	2,000	5,000	175

Melons

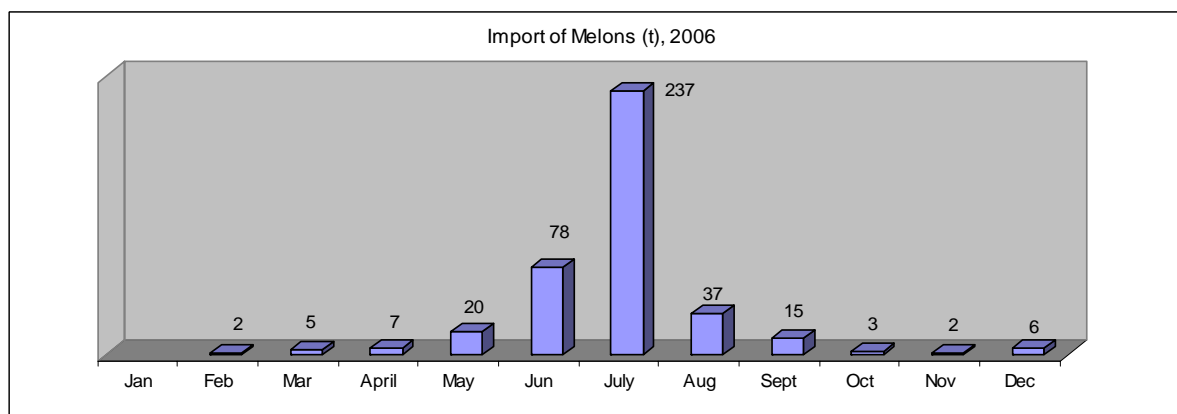
412 tonnes of melons were imported with a declared value of €91,673 – 81 % from Macedonia alone.



Country	Quantity (t)	Value (€)
Macedonia	332	60,860
Turkey	3.4	16,341
Italy	1.4	4,895
Brazil	0.8	3,837
Serbia & Mont.	0.7	882
Other	0.2	4,858

Source: UNMIK Customs service 2006

The seasonality of imports of melons is presented graphically below by month:



Source: UNMIK Customs service 2006

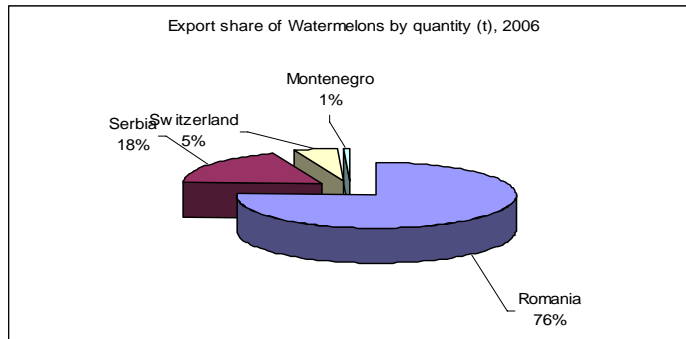
Import of melons increased by 1% compared to the previous year.

	<u>2005</u>	<u>2006</u>	Change %
Melons	Quantity (t)	Quantity (t)	
	409	412	1

Export of individual temperate fruits

Watermelon

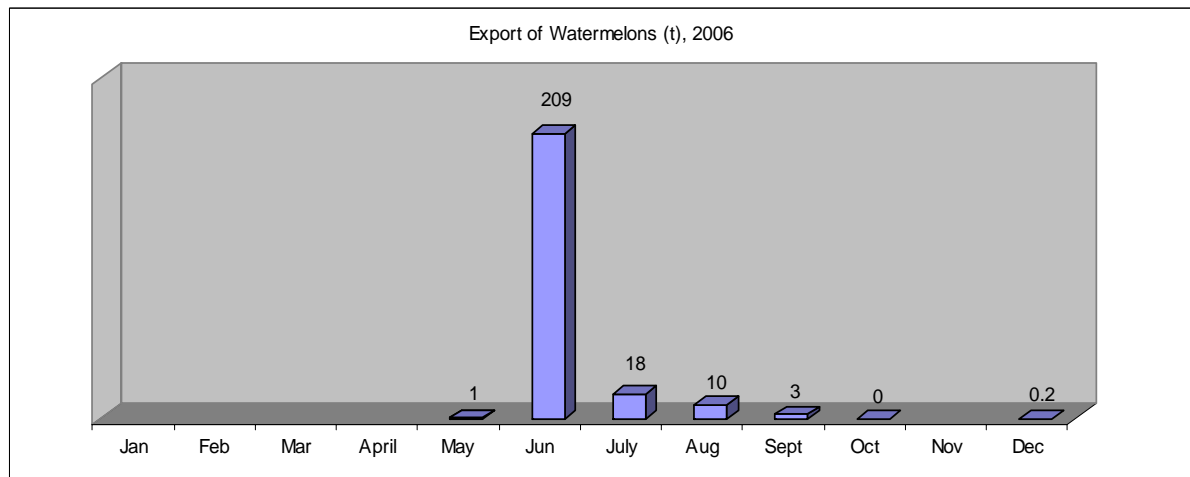
241 tonnes of watermelons were exported, with a declared value of €10,344. Romania is main importing country with 76% of total export by weight.



Country	Quantity (t)	Value (€)
Romania	183.57	7158.8
Serbia	43.47	2173.5
Switzerland	12.00	660.0
Montenegro	2.11	352.4

Source: UNMIK Customs service 2006

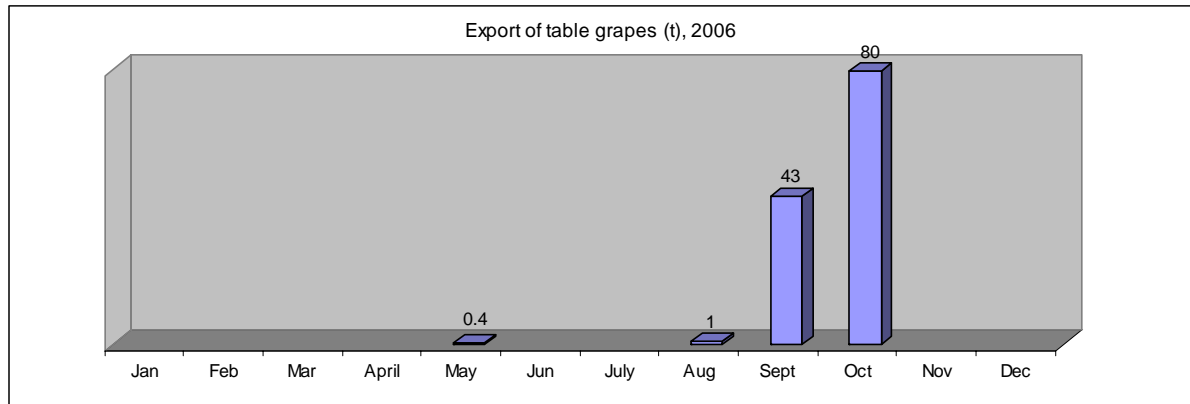
The seasonality of export of watermelons is presented in the diagram below:



Source: UNMIK Customs service 2006

Grapes

124 tonnes of table grapes were exported with declared value of €25,019. The total weight was exported to Montenegro. The diagram below shows the export seasonality of Grapes.

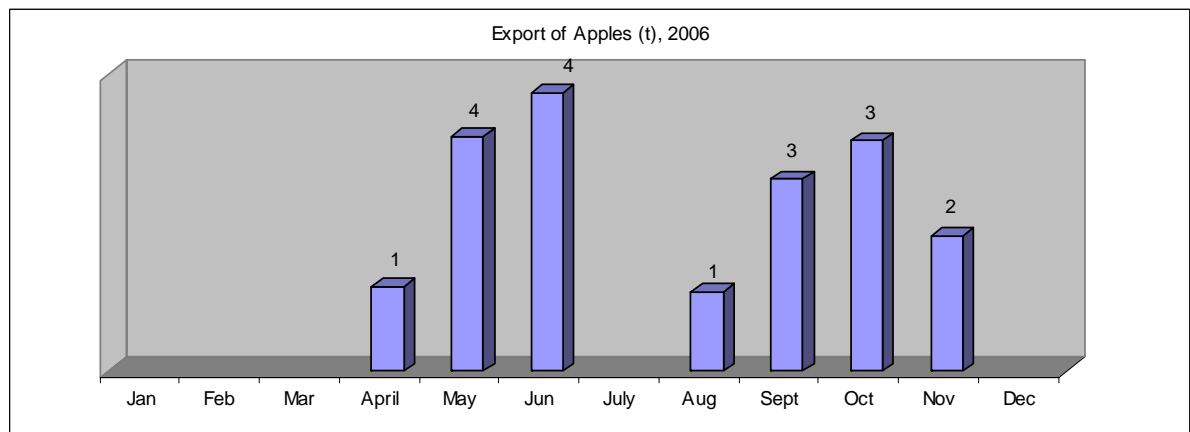


Source: UNMIK Customs service 2006

Apple

19 tonnes of apples were exported, with declared value of €3,667. The total weight was exported to Montenegro.

The diagram below shows the export seasonality of apples.

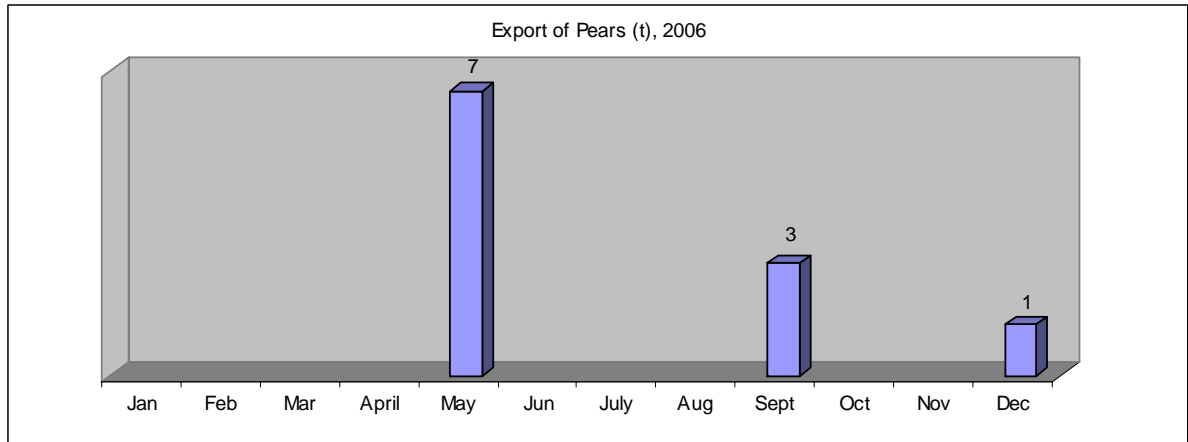


Source: UNMIK Customs service 2006

Pears

12 tonnes of pears were exported with declared value of €2,600. The total weight was exported to Montenegro.

The diagram below shows the export seasonality of pears.

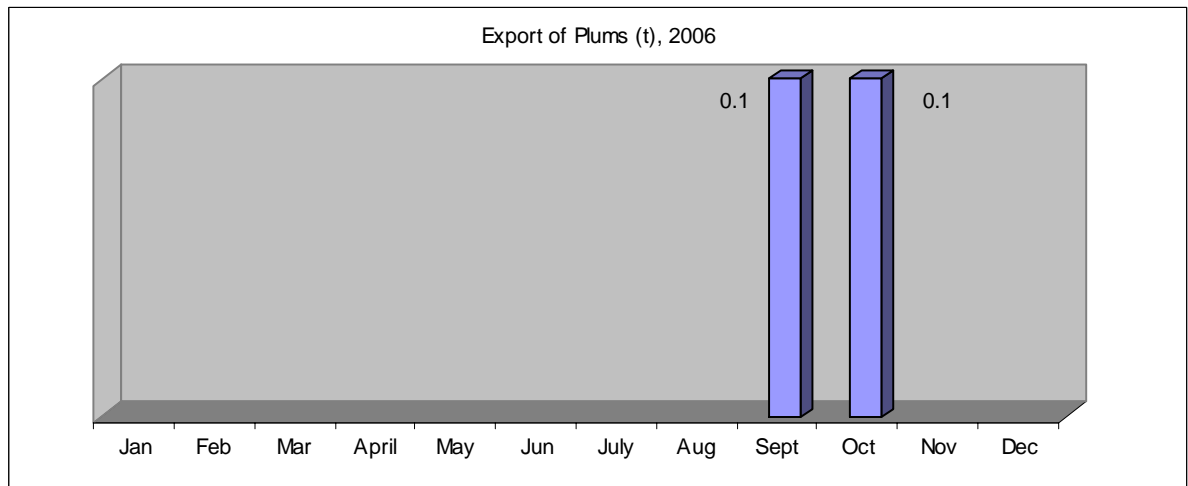


Source: UNMIK Customs service 2006

Plums

200 kg of plums were exported with declared value of €35. The total weight was exported to Montenegro.

The diagram below shows the export seasonality of plums.

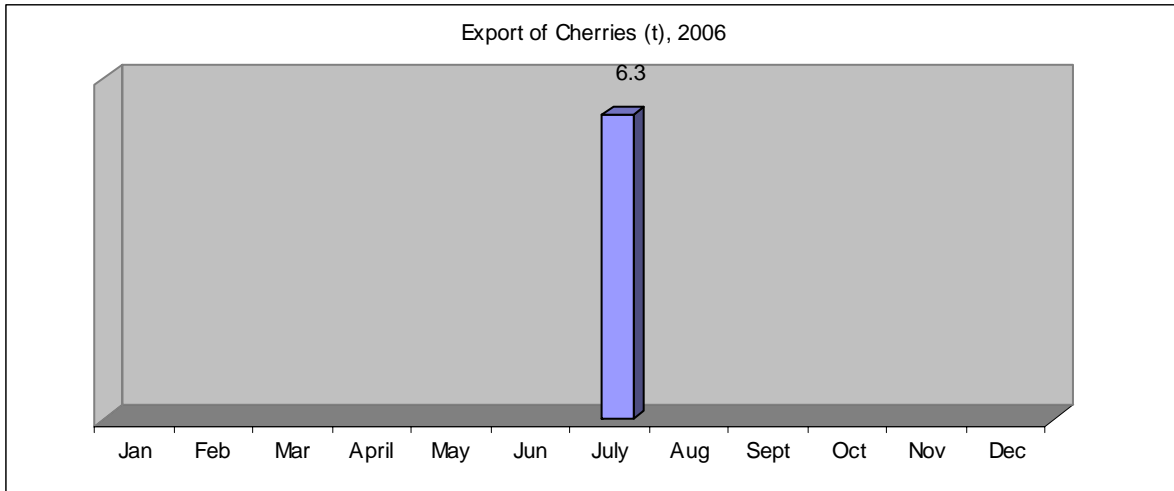


Source: UNMIK Customs service 2006

Cherries

6.3 tonnes of cherries were exported with declared value of €3,120. The total weight was exported to Greece.

The diagram below shows the export seasonality of cherries.

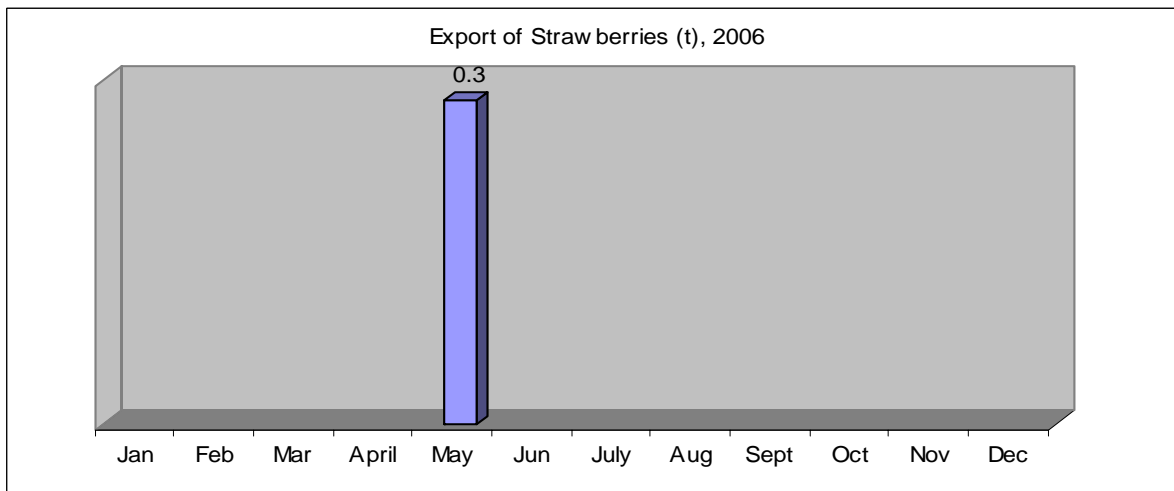


Source: UNMIK Customs service 2006

Strawberries

330 kg of strawberries were exported with a declared value of €132. The total weight was exported to Montenegro.

The diagram below shows the export seasonality of strawberries.

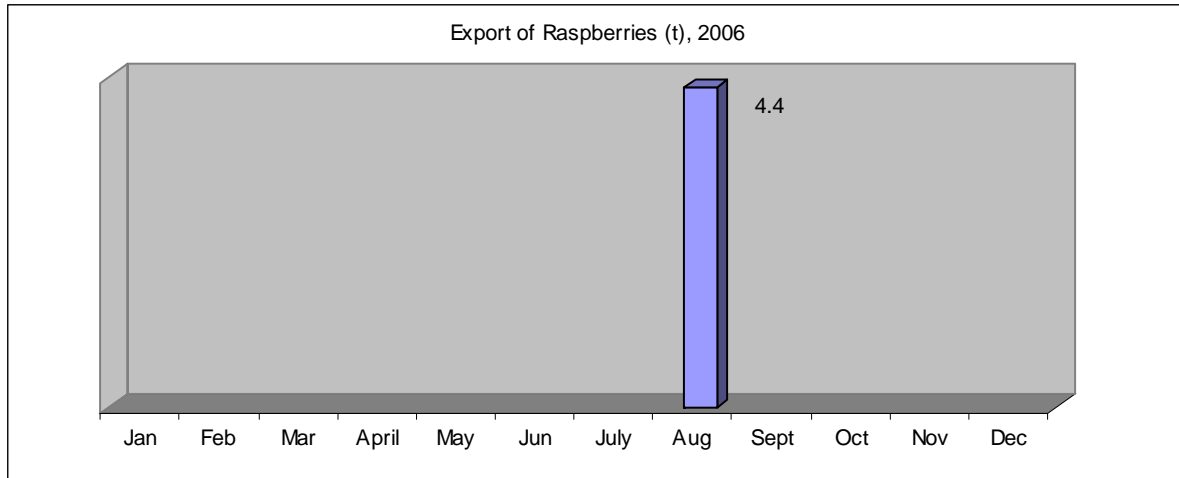


Source: UNMIK Customs service 2006

Raspberries

4,366 kg of raspberries were exported with a declared value of €3,274. The total weight was exported to Serbia.

The diagram below shows the export seasonality of raspberries.

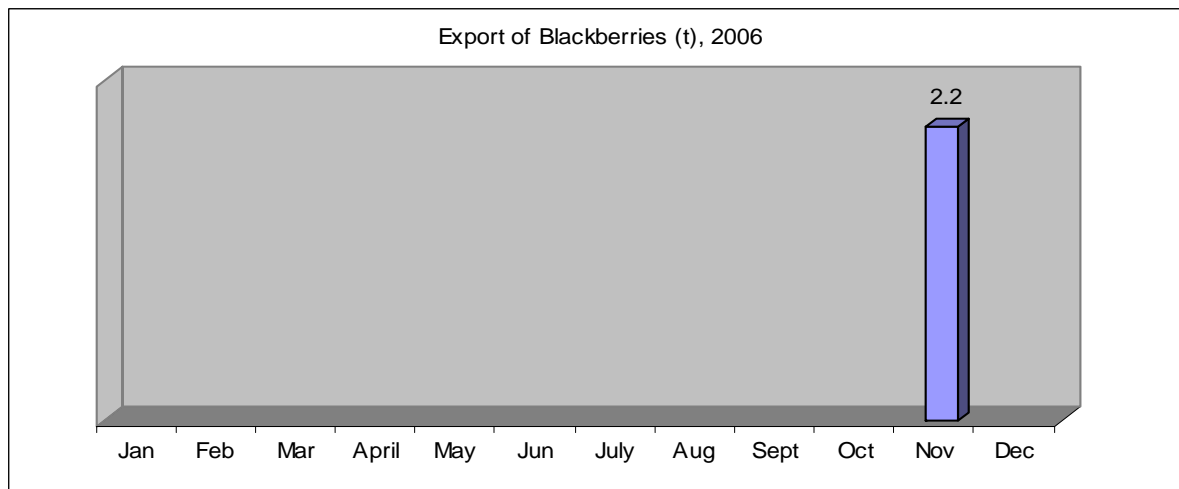


Source: UNMIK Customs service 2006

Blackberries

2,170 kg of blackberries were exported with declared €759. The total weight was exported to Serbia.

The diagram below shows the export seasonality of blackberries.

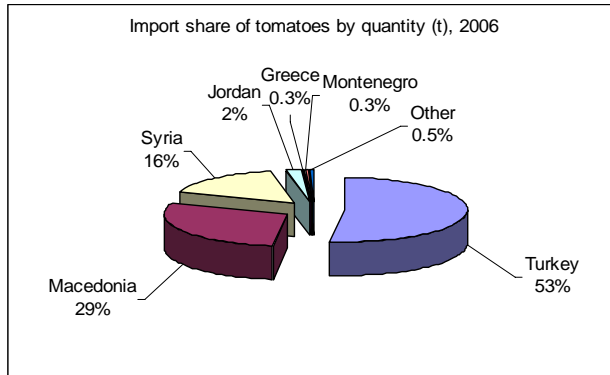


Source: UNMIK Customs service 2006

Import of individual temperate vegetables

Tomatoes

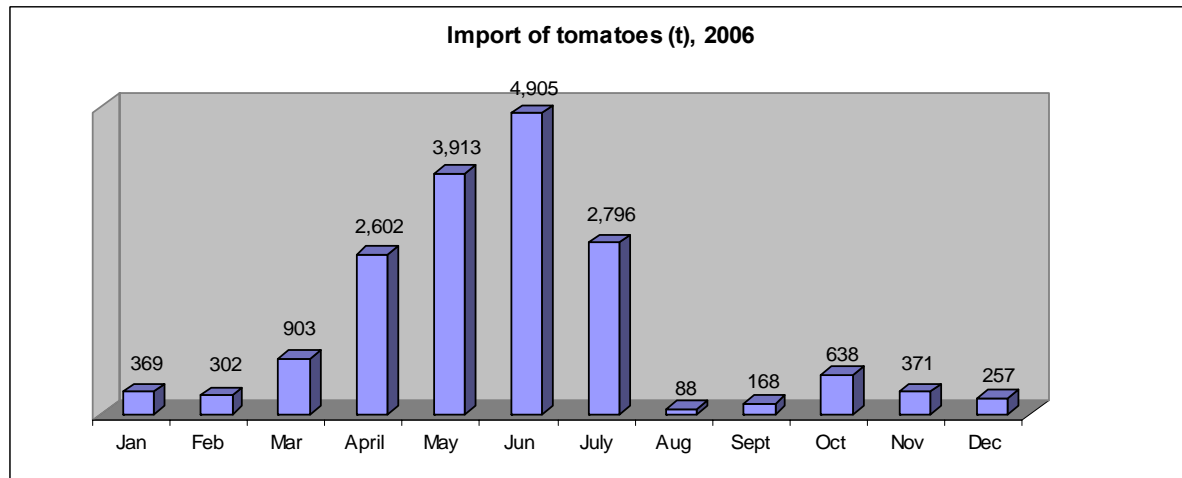
Customs data shows that 17,313 tonnes of tomatoes were imported with a declared value of €4,864,267 with 53% originating from Turkey.



Country	Quantity (t)	Value (€)
Turkey	9,007	2,882,047
Macedonia	4,974	1,081,599
Syria	2,795	753,146
Jordan	360	98,138
Greece	51	15,513
Montenegro	45	5,625

Source: UNMIK Customs service 2006

The seasonality of imports of tomatoes is presented graphically below by month:



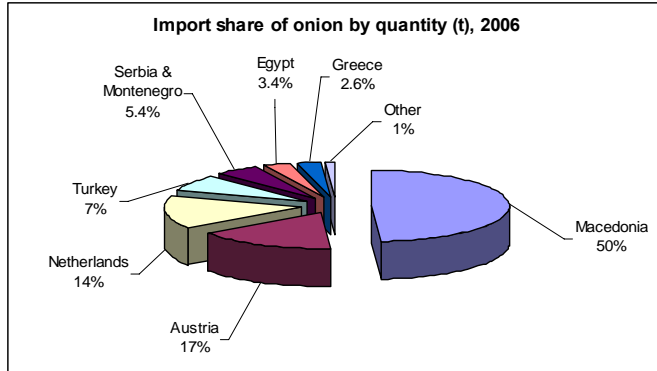
Source: UNMIK Customs service 2006

Import of tomatoes increased by 11% compared to 2005.

	<u>2005</u>	<u>2006</u>	Change %
Tomatoes	Quantity (t)	Quantity (t)	
	15,563	17,313	11

Onions and onion sets

Custom data indicate that 4,114 tonnes of different types of onions were imported with a declared value of € 899,994 - 50% from Macedonia alone.

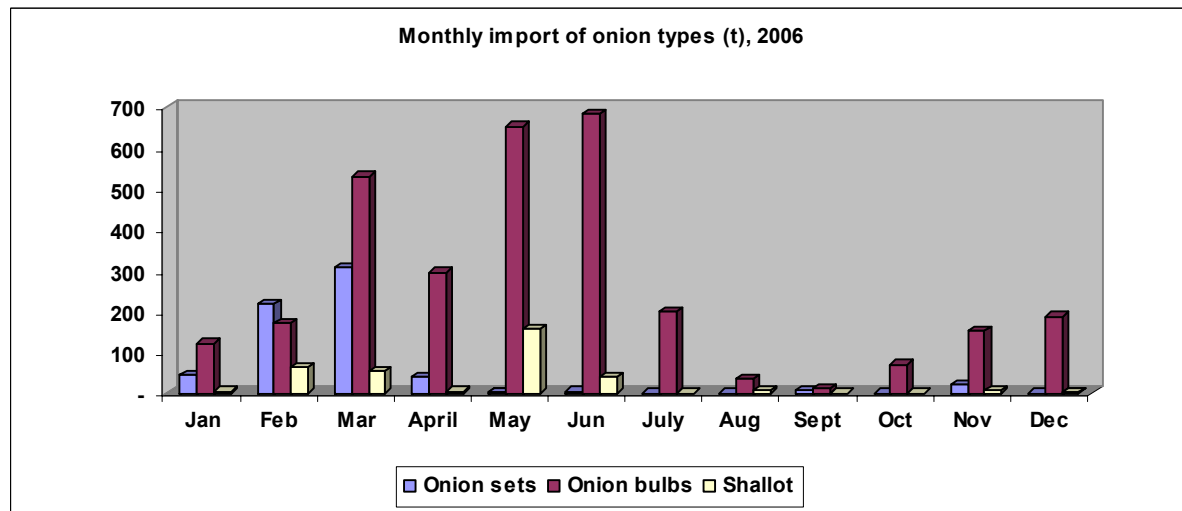


Country	Quantity (t)	Value (€)
Macedonia	2,008	325,359
Austria	689	72,351
Netherlands	593	301,891
Turkey	307	64,251
Serbia & Mont.	220	69,136
Egypt	139	25,380
Greece	105	19,341

Source: UNMIK Customs service 2006

The total imports include 652 tonnes of onions sets, 3,115 tonnes of onions and 49.46 tonnes of shallots or spring onions.

The seasonality of imports of different types of onions is presented graphically below by month:



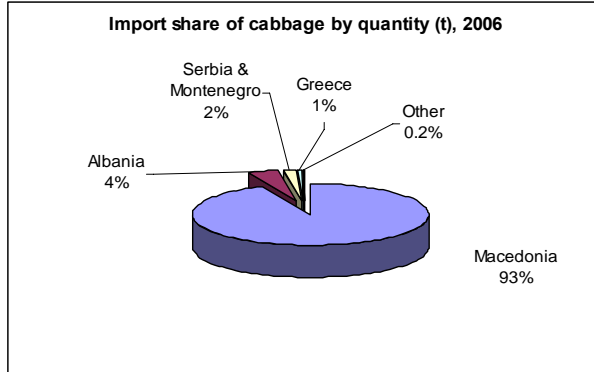
Source: UNMIK Customs service 2006

Import of different types of onions fell by 36% compared to 2005.

	2005 Quantity (t)	2006 Quantity (t)	Change %
Onions	6,405	4,114	-36

Cabbages

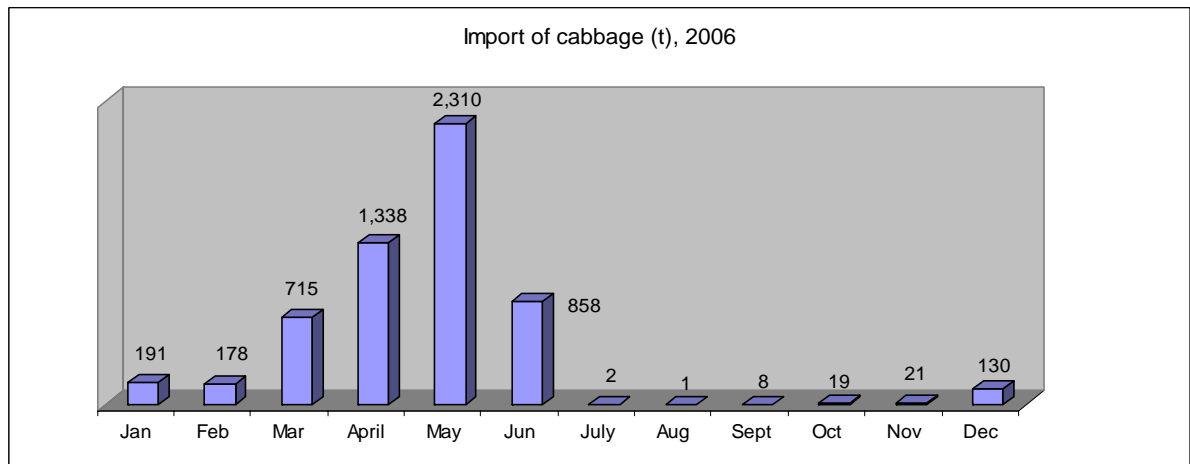
5,771 tonnes of cabbages were imported with a declared value of €536,775 – 93% from Macedonia alone.



Country	Quantity (t)	Value (€)
Macedonia	5,389	505,272
Albania	242	13,422
Serbia & Mont.	96	7,615
Greece	30	5,811
Other	13	4,655

Source: UNMIK Customs service 2006

The seasonality of imports of cabbages is presented graphically below by month:



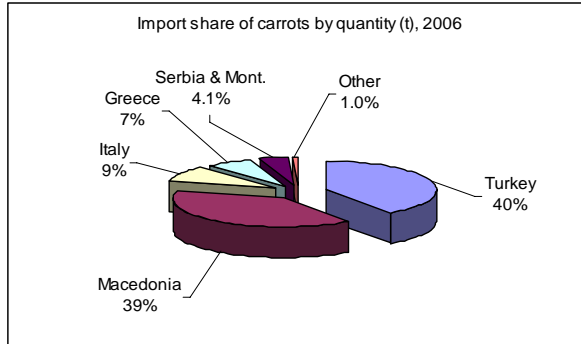
Source: UNMIK Customs service 2006

Import of cabbages increased by 8% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
Cabbage	Quantity (t)	Quantity (t)	
	5,321	5,771	8

Carrots

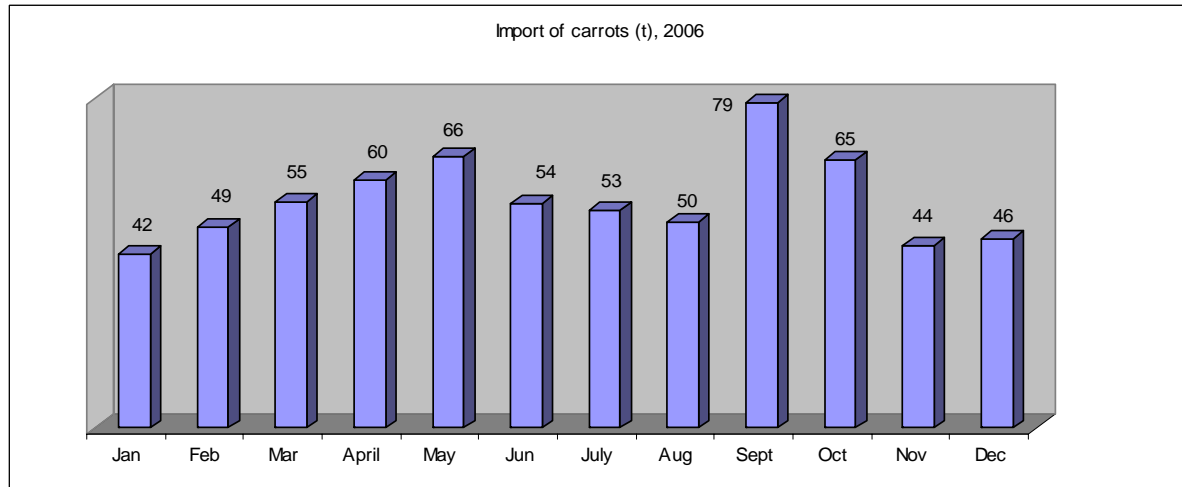
663 tonnes of carrots were imported with a declared value of €155,298 –Turkey and Macedonia representing 79% of total weight.



Country	Quantity (t)	Value (€)
Turkey	265	65,495
Macedonia	261	54,337
Italy	59	21,121
Greece	45	11,197
Serbia & Mont.	27	1,977
Other	6	1,172

Source: UNMIK Customs service 2006

The seasonality of imports of carrots is presented graphically below by month:



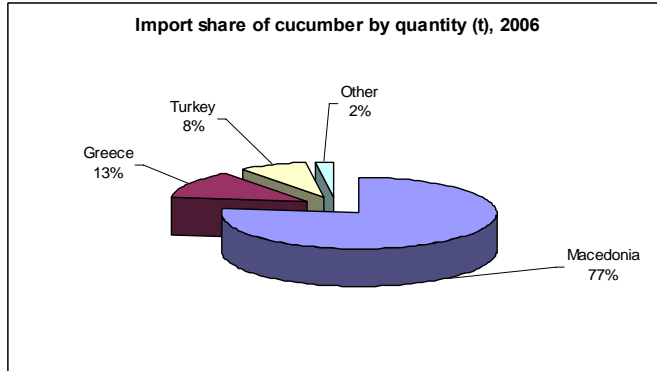
Source: UNMIK Customs service 2006

Import of carrots fell by 37% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
	Quantity (t)	Quantity (t)	
Carrots	1,062	663	-37

Cucumbers

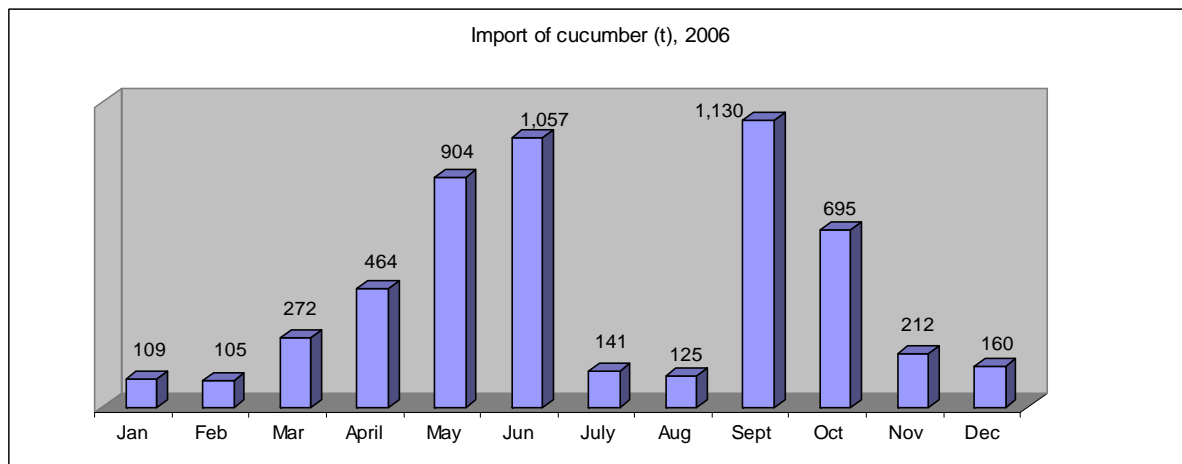
5,373 tonnes of cucumbers were imported with a declared value of €1,214,268 – 77% from Macedonia alone



Country	Quantity (t)	Value (€)
Macedonia	4,150	878,089
Greece	691	184,948
Turkey	419	124,331
Other	112	26,901

Source: UNMIK Customs service 2006

The seasonality of imports of cucumbers is presented graphically below by month:



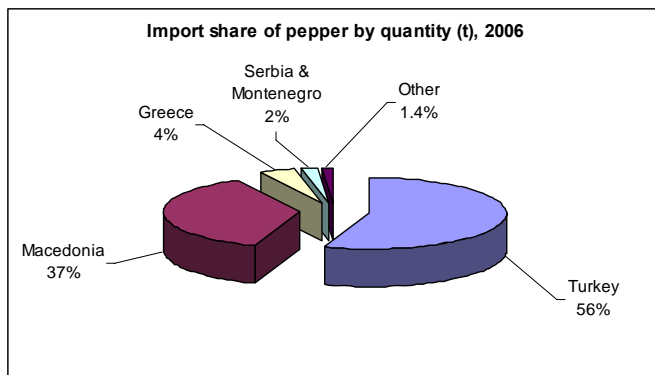
Source: UNMIK Customs service 2006

Import of cucumbers increased by 15% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
	Quantity (t)	Quantity (t)	
Cucumbers	4,669	5,373	15

Peppers

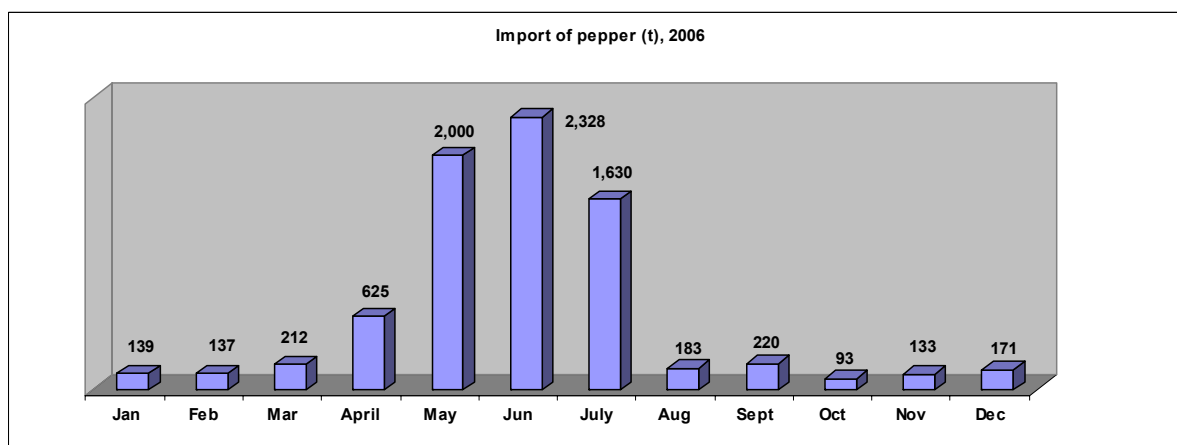
7,872 tonnes of peppers were imported with a declared value of €2,798,624. Turkey and Macedonia represents 93% of total imports by weight.



Country	Quantity (t)	Value (€)
Turkey	4,347	1,751,938
Macedonia	2,933	863,684
Greece	339	105,555
Serbia & Mont.	145	43,963

Source: UNMIK Customs service 2006

The seasonality of imports of peppers is presented graphically below by month:



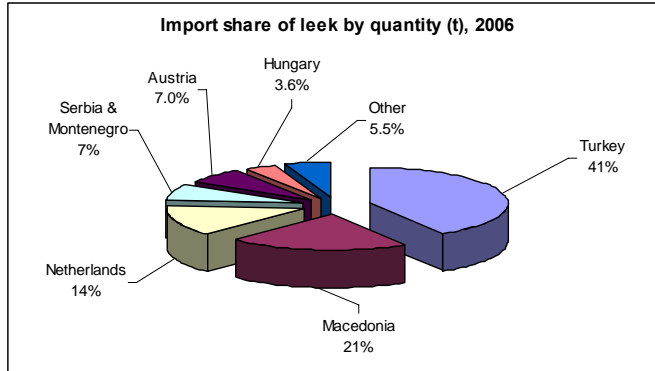
Source: UNMIK Customs service 2006

Import of peppers increased by 7% compared to the previous year.

	<u>2005</u>	<u>2006</u>	
	Quantity (t)	Quantity (t)	Change %
Peppers	7,354	7,872	7

Leeks

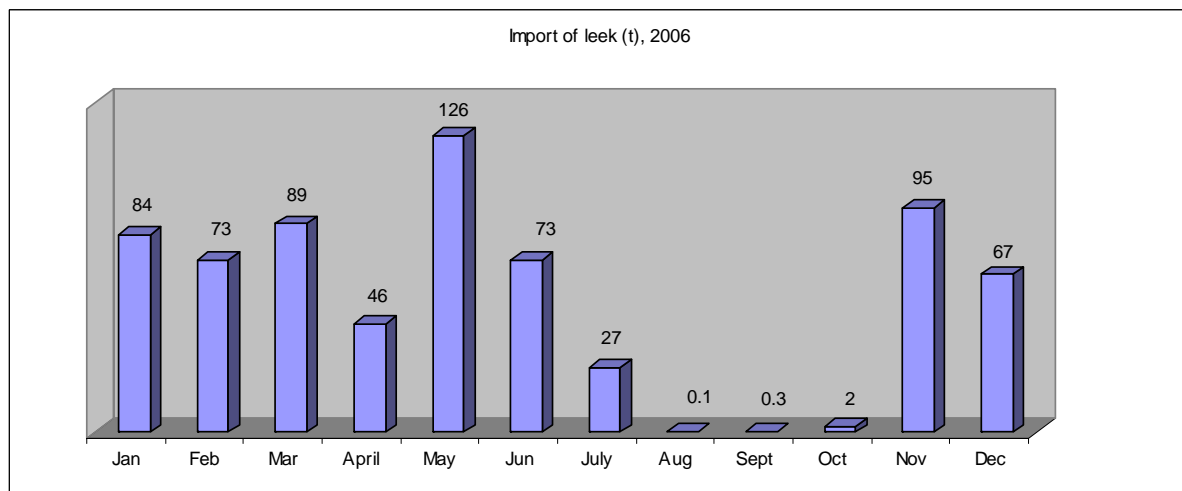
683 tonnes of leeks were imported with a declared value of €126,493. Macedonia and Turkey represents 62% of total imports by weight.



Country	Quantity (t)	Value (€)
Turkey	283	69,516
Macedonia	147	32,436
Netherlands	96	6,880
Serbia & Mont.	50	6,720
Austria	48	5,160
Hungary	25	1,750

Source: UNMIK Customs service 2006

The seasonality of imports of leeks is presented graphically below by month:



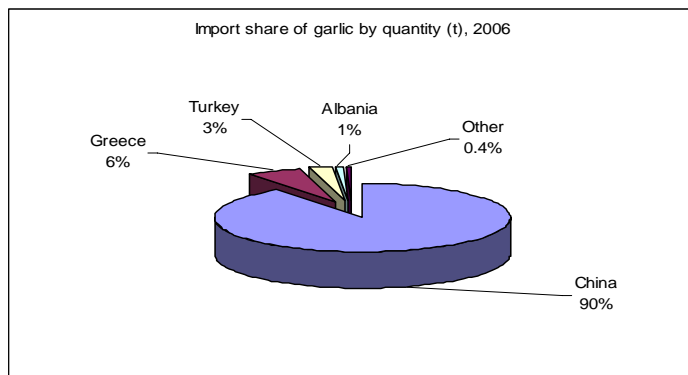
Source: UNMIK Customs service 2006

Import of leeks increased by 58% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
Leeks	Quantity (t)	Quantity (t)	
	431	683	58

Garlic

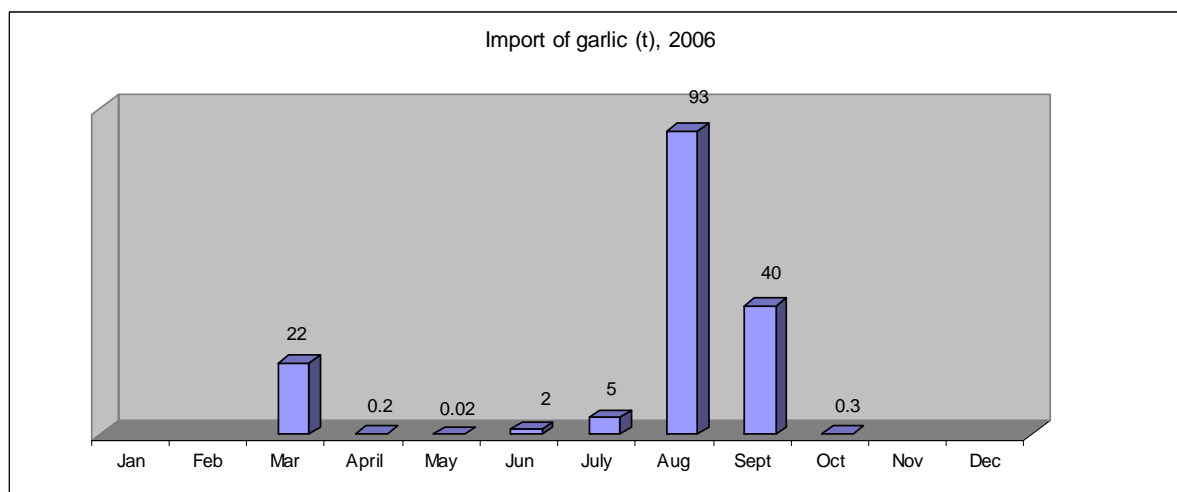
162 tonnes of garlic were imported with a declared value of €51,803 – 90% from China alone.



Country	Quantity (t)	Value (€)
China	145,7	47,439
Greece	9,7	2,798
Turkey	4,2	982
Albania	1,5	338

Source: UNMIK Customs service 2006

The seasonality of imports of garlic is presented graphically below by month:



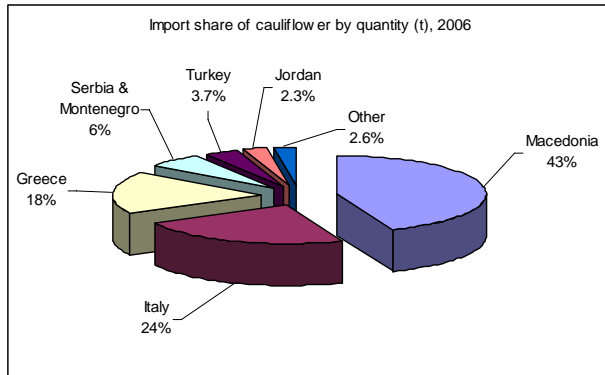
Source: UNMIK Customs service 2006

Import of garlic fell by 1% compared to previous year.

	<u>2005</u>	<u>2006</u>	
	Quantity (t)	Quantity (t)	Change %
Leeks	163	162	1

Cauliflower

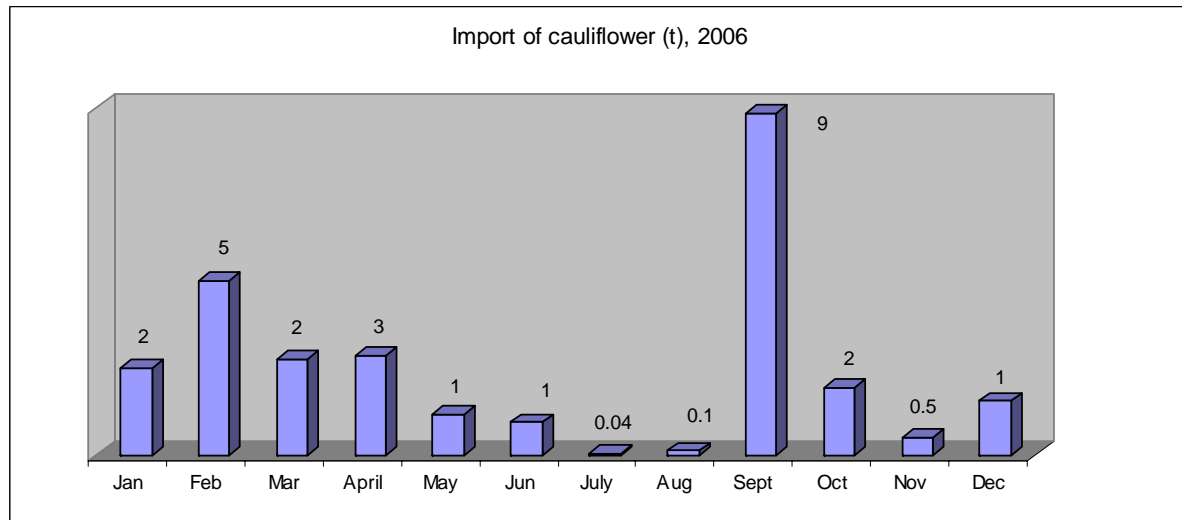
26 tonnes of cauliflower were imported with a declared value of €9,909 – Macedonia and Italy represents 67% of total imports by weight.



Source: UNMIK Customs service 2006

Country	Quantity (t)	Value (€)
Macedonia	11,5	2,810
Italy	6,2	2,423
Greece	4,7	2,616
Serbia & Mont.	1,6	1,343
Turkey	0,9	196
Jordan	0,6	137
Other	0,6	385

The seasonality of imports of cauliflower is presented graphically below by month:



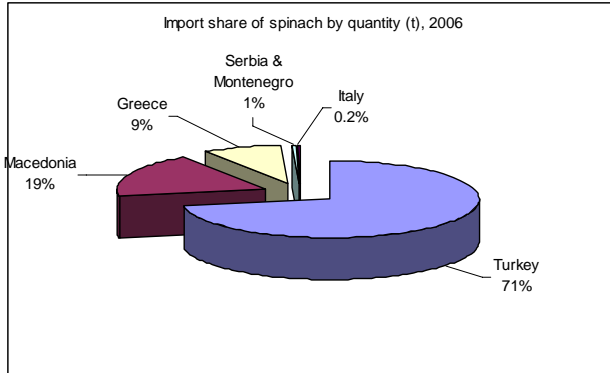
Source: UNMIK Customs service 2006

Import of cauliflower fell by 83% compared to previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
	Quantity (t)	Quantity (t)	
Cauliflower	157	26	-83

Spinach

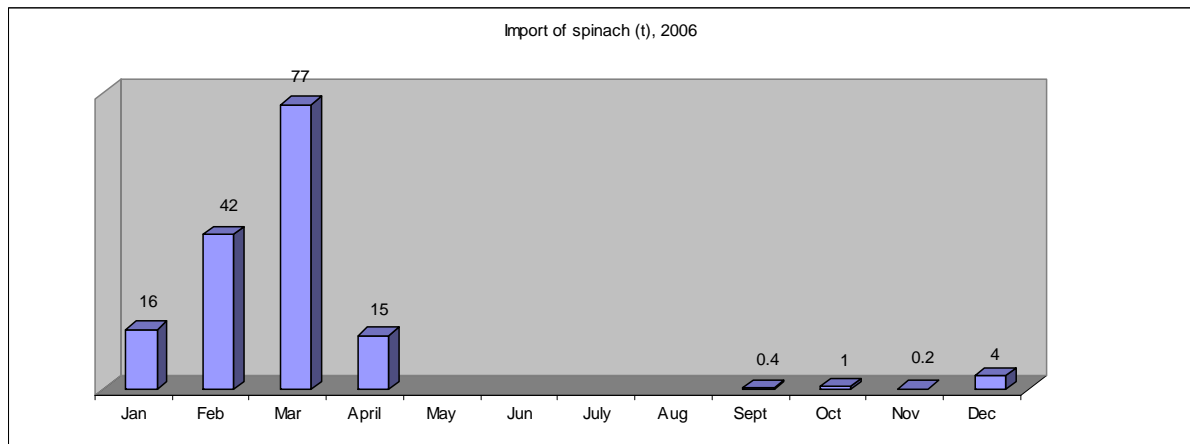
154 tonnes of spinach were imported with a declared value of €37,385 – 71% from Turkey alone.



Source: UNMIK Customs service 2006

Country	Quantity (t)	Value (€)
Turkey	111.0	28,100
Macedonia	28,5	5,867
Greece	13,2	2,920
Serbia & Mont.	1,0	304
Italy	0.3	195

The seasonality of imports of spinach is presented graphically below by month:



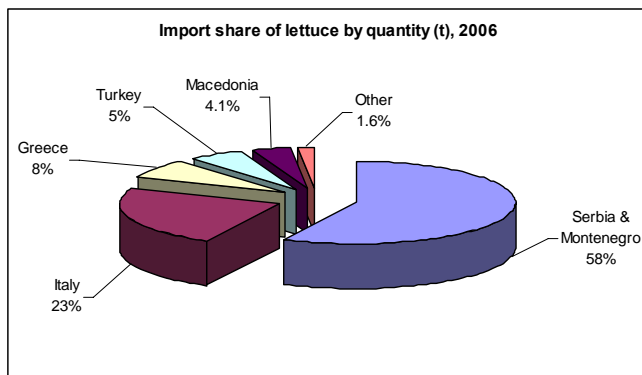
Source: UNMIK Customs service 2006

Import of spinach increased by 12% compared to the previous year.

	<u>2005</u>	<u>2006</u>	Change %
	Quantity (t)	Quantity (t)	
Spinach	137	154	12

Lettuce

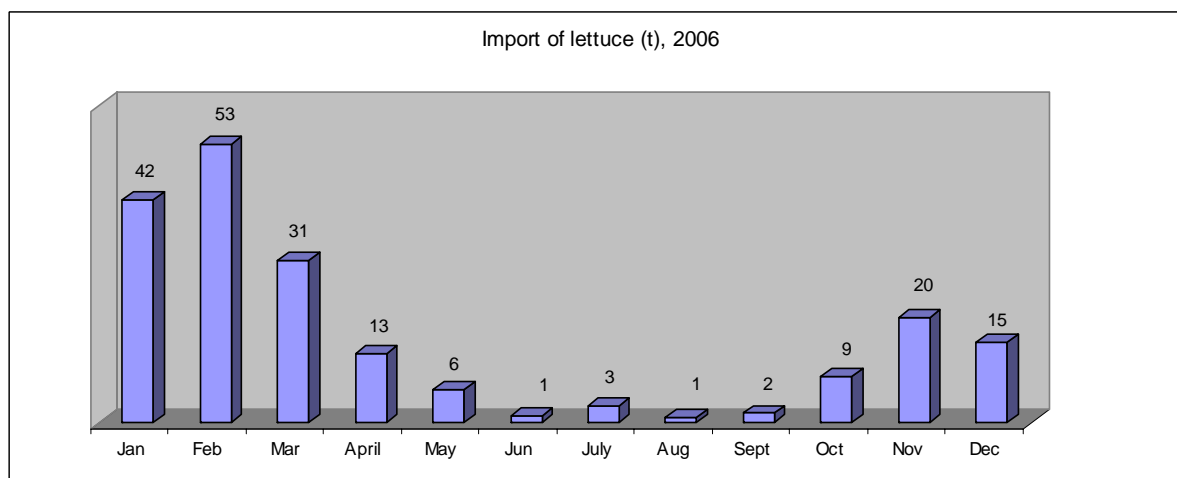
197 tonnes of lettuces were imported with a declared value of €35,953 - 58% by weight from Serbia and Montenegro.



Country	Quantity (t)	Value (€)
Serbia & Mont.	113,3	9,721
Italy	46,1	16,942
Greece	15,5	4,068
Turkey	10,7	2,435
Macedonia	8,0	1,682

Source: UNMIK Customs service 2006

The seasonality of imports of lettuce is presented graphically below by month:



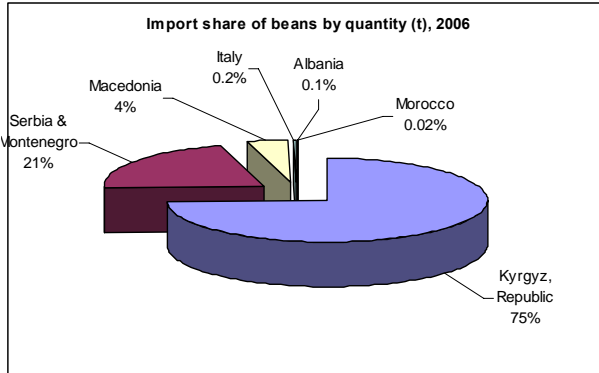
Source: UNMIK Customs service 2006

Import of lettuce fell by 15% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
Lettuce	Quantity (t)	Quantity (t)	
	233	197	-15

Beans

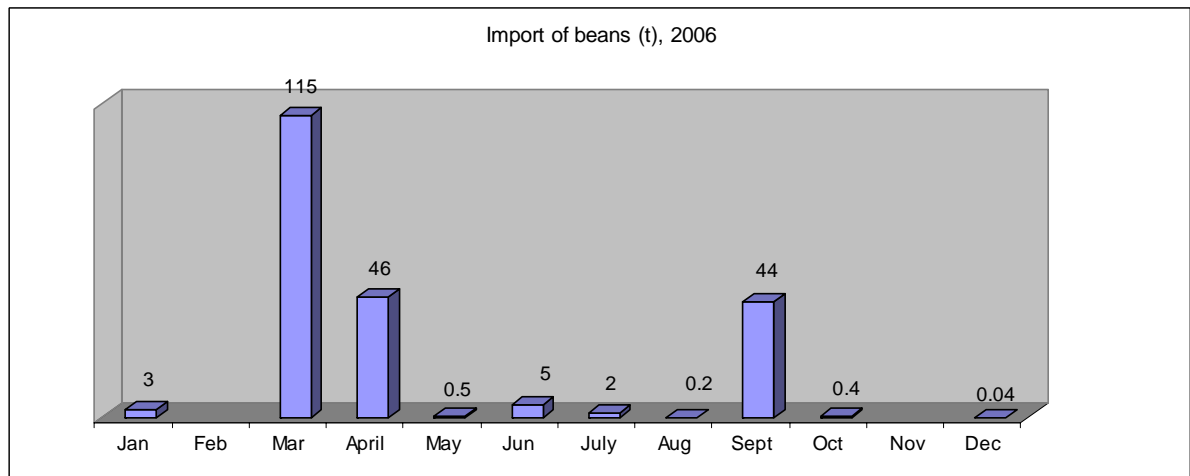
217 tonnes of beans were imported with a declared value of €74,517 – 76% of total import originated from Kyrgyzstan.



Country	Quantity (t)	Value (€)
Kyrgyz, Republic	161,0	64,400
Serbia & Mont.	46,3	7,755
Macedonia	8,8	2,121
Italy	0,3	157
Albania	0,2	52
Morocco	0,04	34

Source: UNMIK Customs service 2006

The seasonality of imports of beans is presented graphically below by month:



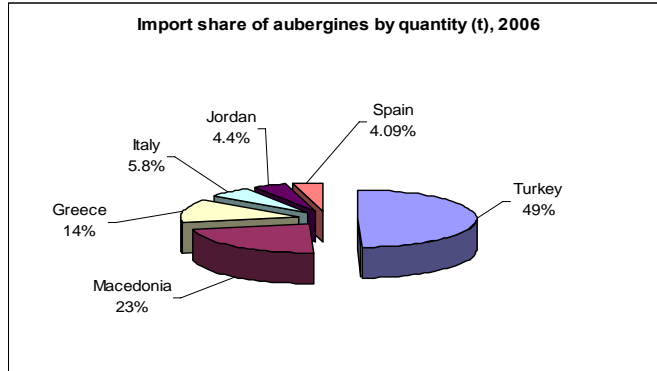
Source: UNMIK Customs service 2006

Import of beans increased by 78% compared to the previous year.

	<u>2005</u>	<u>2006</u>	<u>Change %</u>
Beans	Quantity (t)	Quantity (t)	
	121	217	78

Aubergines

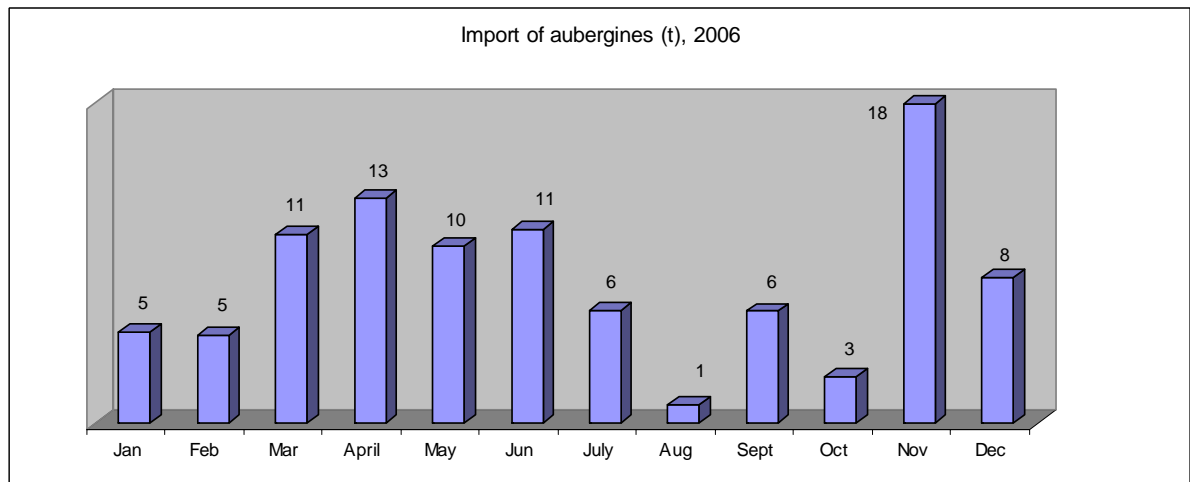
97 tonnes of aubergines were imported with a declared value of €29,743 – 49% by weight from Turkey alone.



Country	Quantity (t)	Value (€)
Turkey	47,8	15,104
Macedonia	22,0	5,370
Greece	13,1	4,296
Italy	5,6	2,552
Jordan	4,2	1,079
Spain	3,9	1,342

Source: UNMIK Customs service 2006

The diagram below shows import of aubergines by month:



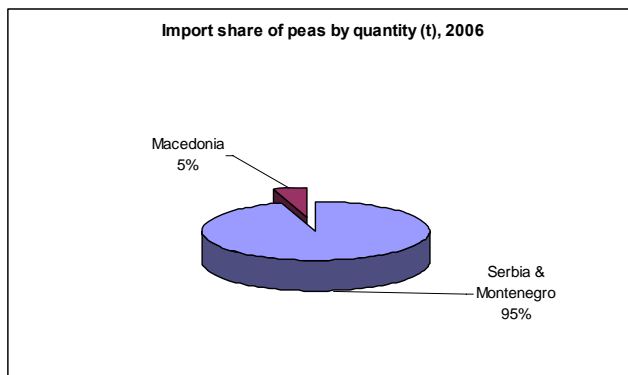
Source: UNMIK Customs service 2006

Import of aubergines increased by 14% compared to previous year.

	<u>2005</u>	<u>2006</u>	
	Quantity (t)	Quantity (t)	Change %
Aubergines	85	97	14

Peas

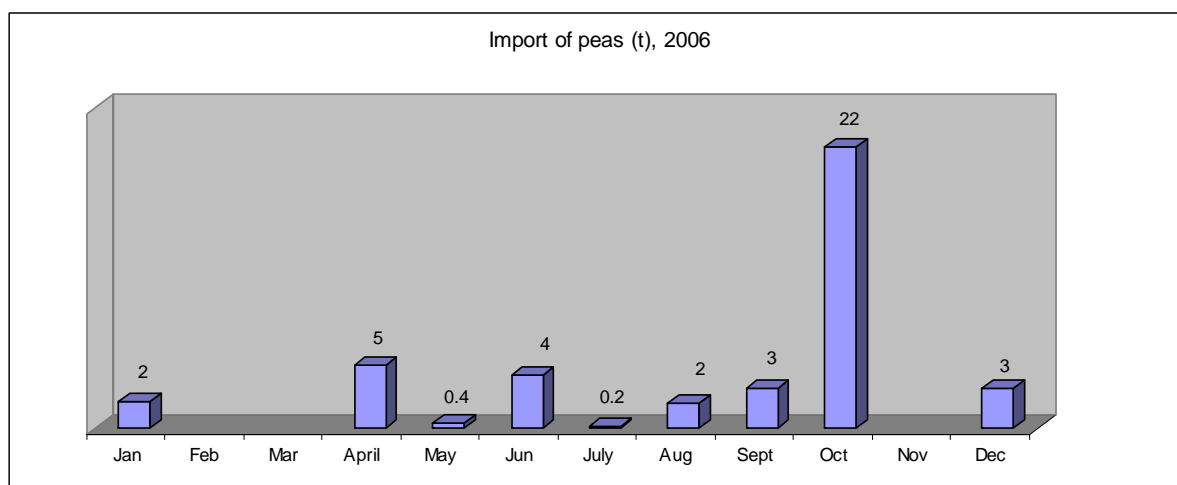
42 tonnes of peas were imported with a declared value of €27,244 - 95% by weight from Serbia and Montenegro alone.



Country	Quantity (t)	Value (€)
Serbia & Mont.	40,0	26,813
Macedonia	2,0	432

Source: UNMIK Customs service 2006

The seasonality of imports of peas is presented graphically below by month:



Source: UNMIK Customs service 2006

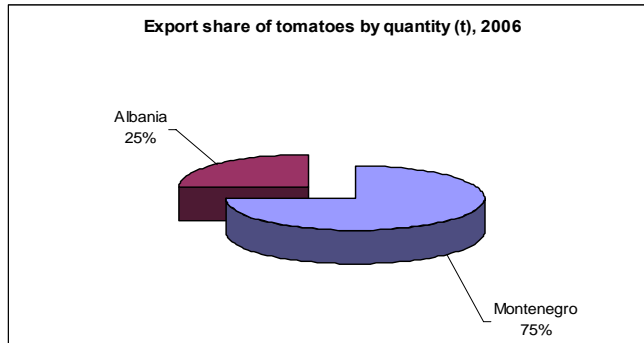
Import of peas increased for 5% compared to previous year.

	<u>2005</u>	<u>2006</u>	Change %
Peas	Quantity (t)	Quantity (t)	
	40	42	5

Export of individual temperate vegetables

Tomatoes

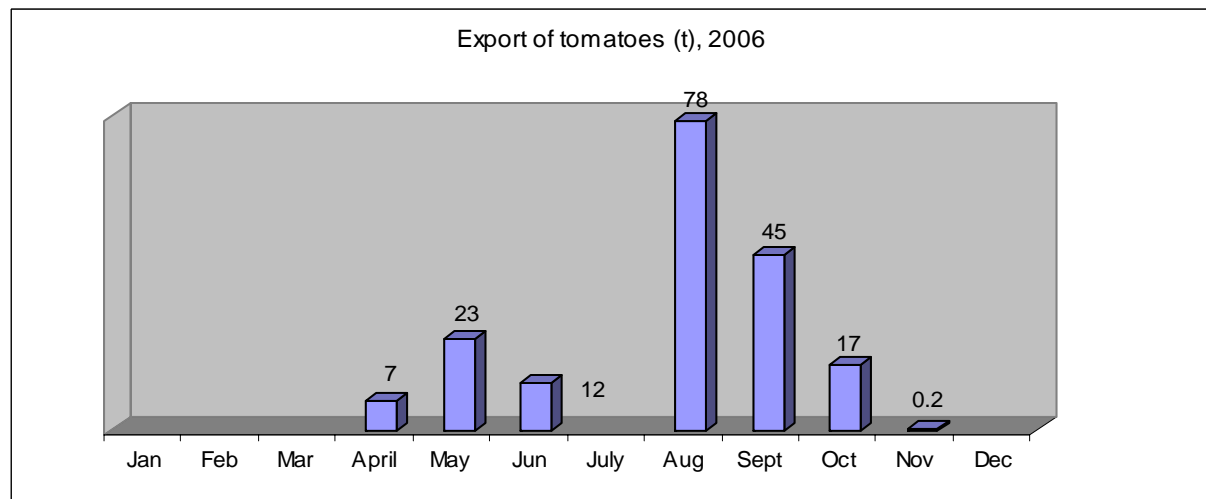
182 tonnes of tomatoes were exported with declared value of €47,491. Montenegro with 75% and Albania with 25% are the main import countries.



Country	Quantity (t)	Value (€)
Montenegro	137	42,606
Albania	46	4,885

Source: UNMIK Customs service 2006

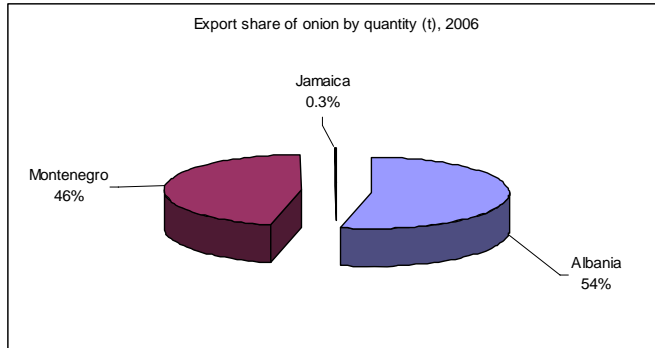
The export seasonality of tomatoes is presented in the diagram below.



Source: UNMIK Customs service 2006

Onions

840 tonnes of different onions were exported with a declared value of €97,206. Albania with 54% and Montenegro with 46% of total weight, are two main import countries.

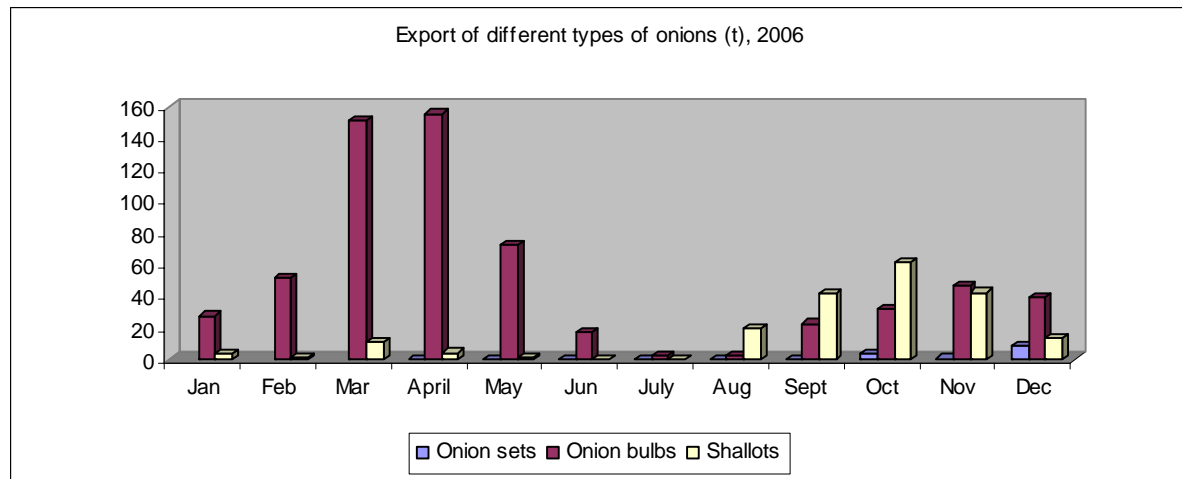


Country	Quantity (t)	Value (€)
Albania	450	50,319
Montenegro	388	46,763
Jamaica	3	125

Source: UNMIK Customs service 2006

The total exports include 14.27 tonnes of onions sets, 622 tonnes of onions and 203 tonnes of shallots or spring onions.

The seasonality of exports of different types of onions is presented graphically below by month:

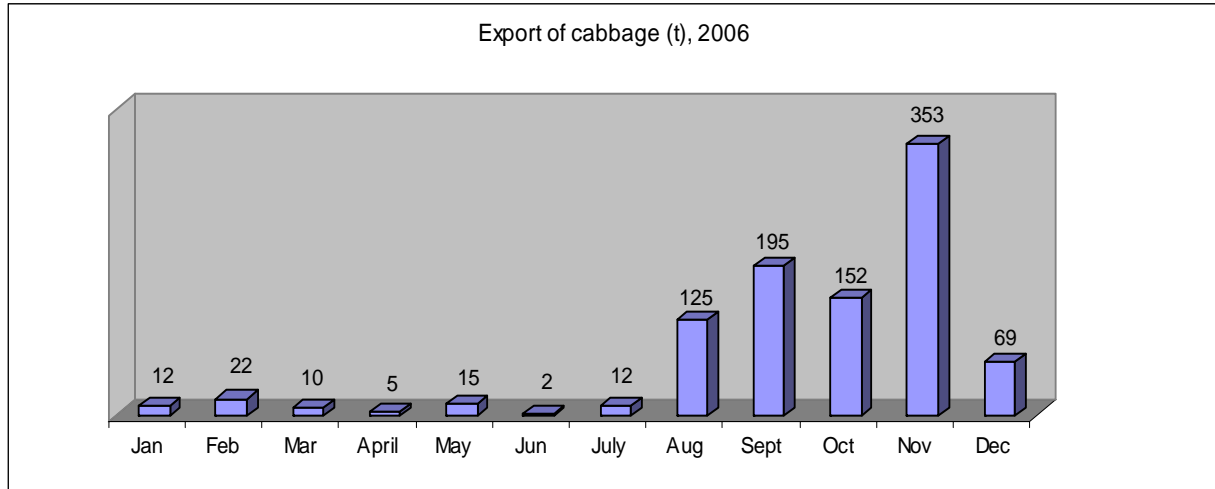


Source: UNMIK Customs service 2006

Cabbage

971 tonnes of cabbages were exported with a declared value of €111,713. The total weight was exported to Montenegro.

The export seasonality of cabbages is presented in the diagram below.

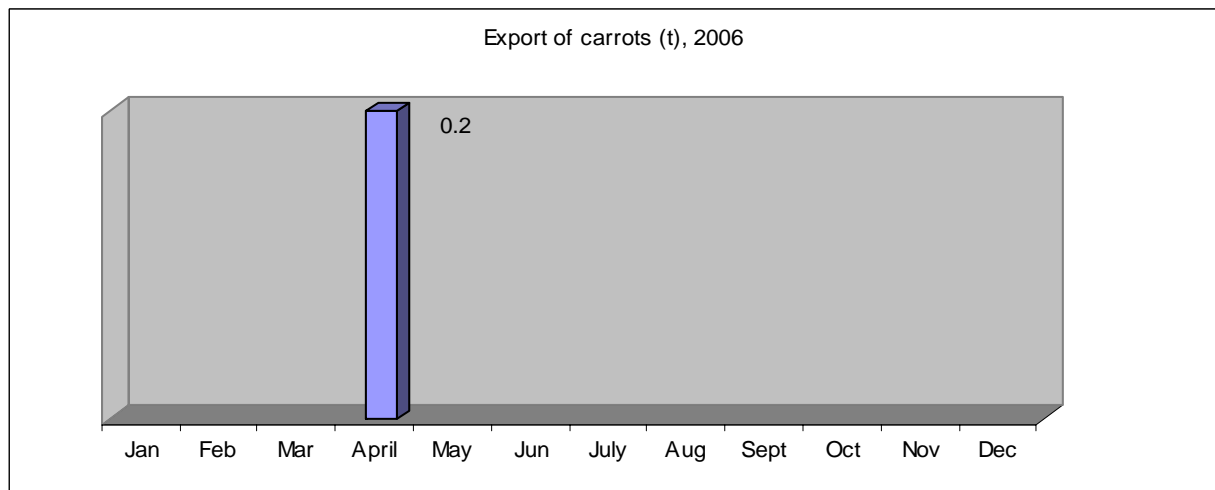


Source: UNMIK Customs service 2006

Carrots

200 kg of carrots were exported with a declared value of €50. The total weight was exported to Montenegro.

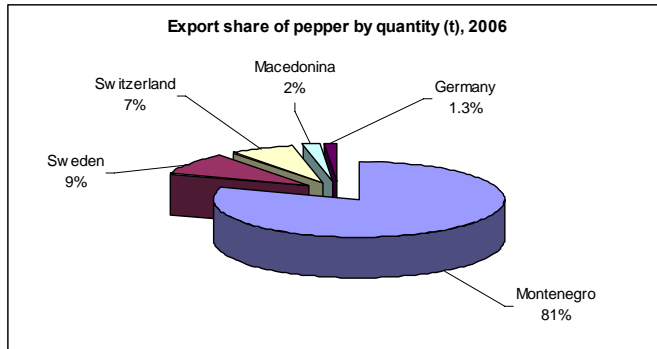
The export seasonality of carrots is presented in the diagram below.



Source: UNMIK Customs service 2006

Peppers

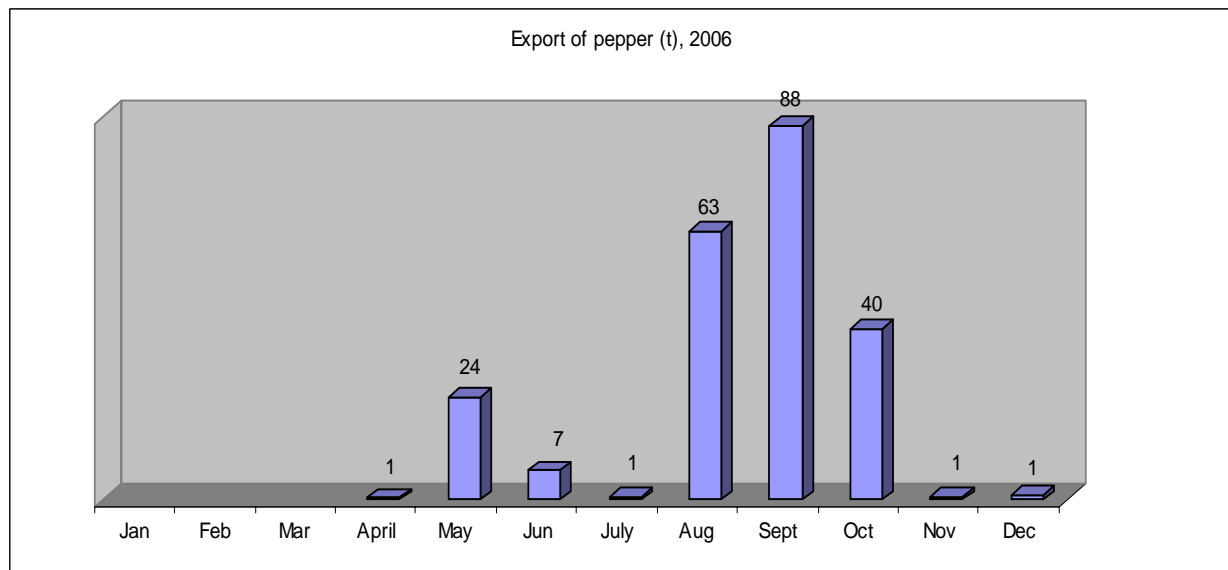
225 tonnes of peppers were exported with a declared value of €60,666. 81% of total weight was exported to Montenegro.



Country	Quantity (t)	Value (€)
Montenegro	181	53,656
Sweden	21	3,150
Switzerland	16	1,871
Macedonia	5	478
Germany	3	1,513

Source: UNMIK Customs service 2006

Export seasonality of peppers is presented in the diagram below.

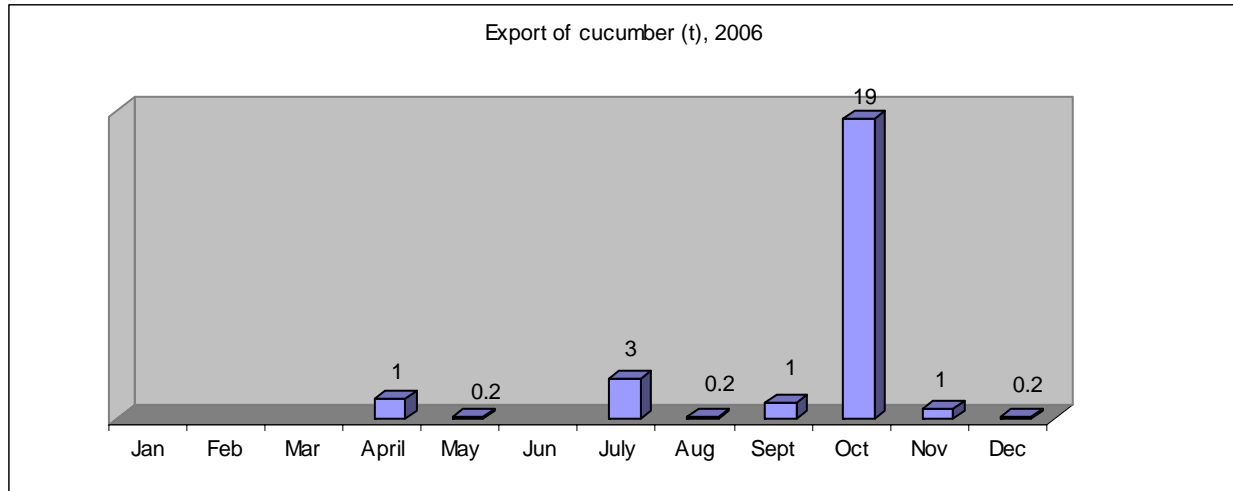


Source: UNMIK Customs service 2006

Cucumber

26 tonnes of cucumbers were imported with a declared value of €2,877. The total weight was exported to Montenegro.

The seasonality of export is presented in the diagram below.

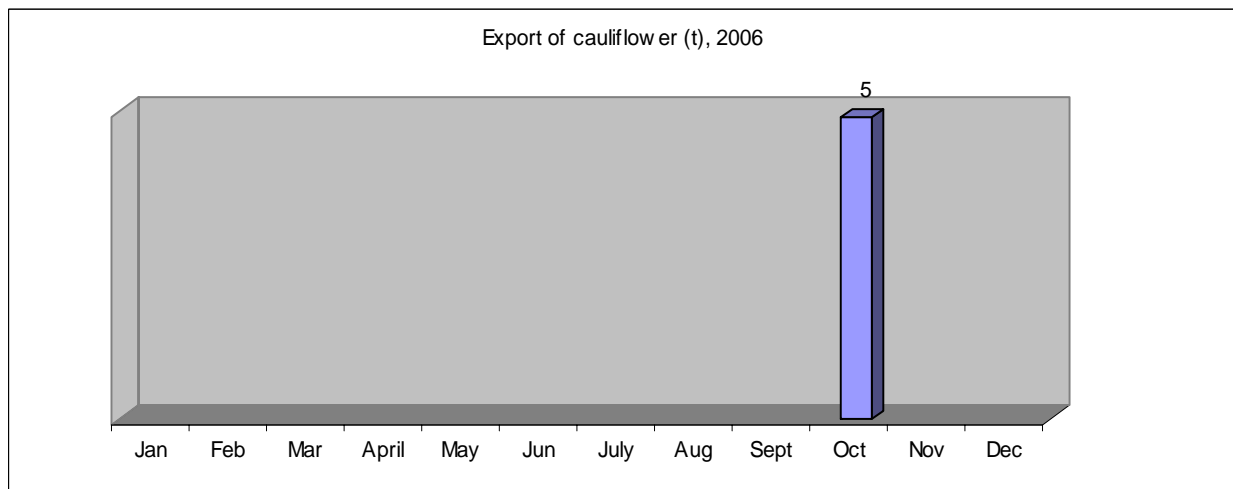


Source: UNMIK Customs service 2006

Cauliflower

5 tonnes of cauliflower were exported with a declared value of €753. The total weight was exported to Montenegro.

The seasonality of export is presented in the diagram below.

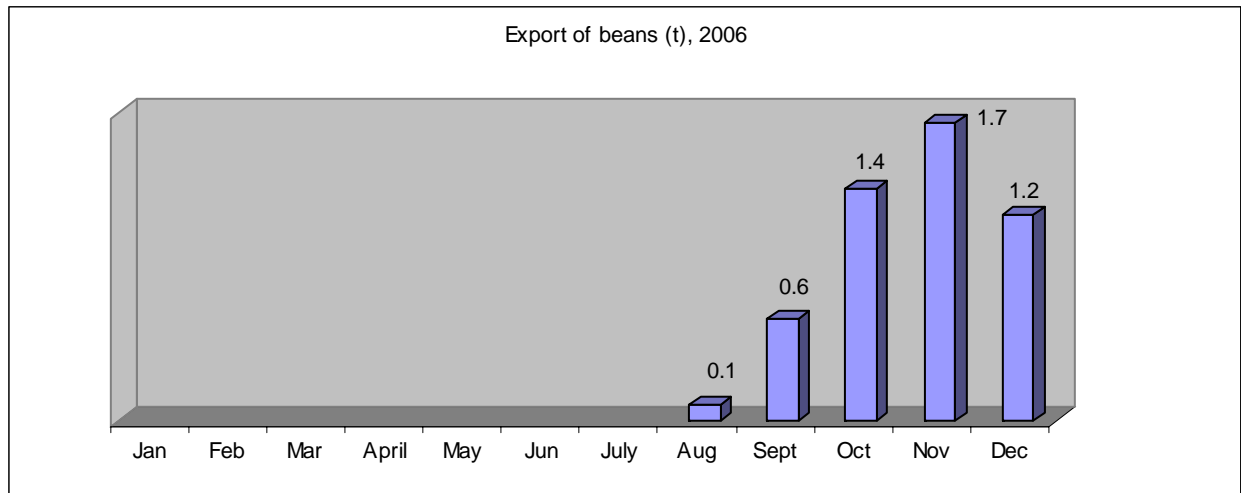


Source: UNMIK Customs service 2006

Beans

5 tonnes of beans were exported with a declared value of €3,793. The total weight was exported to Montenegro.

The seasonality of export is presented in the diagram below.

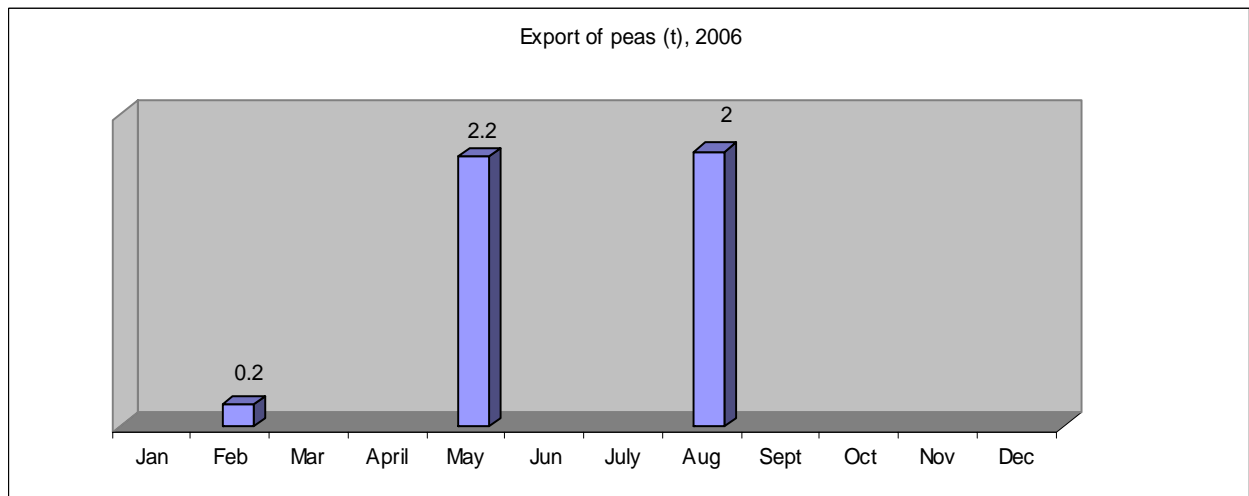


Source: UNMIK Customs service 2006

Peas

5 tonnes of peas were exported with a declared value of €1,257. The total weight was exported to Montenegro.

The seasonality of export is presented in the diagram below.



Source: UNMIK Customs service 2006

Overview of imports & exports

Fruit imports

37,165 tonnes of fresh temperate fruit were imported into Kosovo in 2006 with a declared value of €6,59 million and represented an increase of 11% by weight over the previous year. Watermelon and apple represented more than 80% of total imports by weight⁷ and more than 70% of the declared value⁸. The import of all temperate fruit excluding watermelon, however, actually decreased by 12% from 2005.

Macedonia was by far the most important source of fruit imports accounting for 67% by weight (including 86% of all apples and 64% of all watermelon). Albania increased its export share of fruit into Kosovo to 18% and thereby moved into second place from being ranked 5th in 2005. This was largely due to a substantial increase in watermelon exports.

The situation regarding individual products is described below:

- The import of **Watermelon** increased by 50% over 2005 reaching 20,433 t – with a peak in June-August when technically the crop could be produced locally. Two contributing factors for such an increase could have been the price (lower than 2005) and the hotter temperatures leading to increased demand.
- A reduction of imports over 2005 has been recorded for **Apples, Pears, Nectarines, Apricots and Cherries** – a situation that could not be explained through any substantial increase in local production.
- **Plum** imports increased by 69% with the peak being recorded from July to September – the harvest period for local production.
- Imports of **Strawberries** fell by 11% - possibly a reflection of the expanding local production. This reduction, however, occurred in the main local growing season of May and June – but imports actually increased in April – a month in which local supply from poly-tunnel cultivation should be possible locally.
- The import increased substantially of **Raspberries (123%) and Blackberries (175%)** – but from a low base.

Fruit exports

- Export of fruit from Kosovo in 2006, at 409 tonnes, increased twelve-fold from the figure of 2005 – but still represented less than 1% of the total weight of temperate fruit exports. 80% of the exports went to Romania and Montenegro and largely comprised watermelon and grapes. Some of the exports appear to be actually re-exports since they were recorded at times of the year when there was no local production⁹.
- A summary of these exports are presented in Annex 4.

⁷ Watermelon represented 59 % while apples represented 29% of total imported volume by weight.

⁸ Watermelons and apple represented 35% each of total declared value.

⁹ Montenegro left the Federation of Serbia and Montenegro on 1 May 2006. After that date trade with Kosovo from the old federation was recorded separately under either 'Serbia' or 'Montenegro'. Before that time, however, all trade was recorded under the term 'Serbia and Montenegro'. For the purposes of analysis for that period, the goods which passed through the border at Kulla (Peja) are assumed to be imports from, or exports to, Montenegro, while goods which pass the administrative borders with Serbia in North Mitrovica, Merdare (Podujevo) and Dheu I bardhe (Bujanovc) are recorded as imports from, or exports to, Serbia.

Vegetable imports

42,684 tonnes of fresh temperate vegetables were imported into Kosovo in 2006 with a declared value of € 10,8 million and represented an increase of 1% by weight over the previous year. The most important imported products were tomatoes (40 % by weight), peppers 18%, cabbages 13.5 %, cucumbers 12.6% and onions with 9.6 %.

Turkey and Macedonia remained the main exporting countries representing more than 80 % by weight. Turkey supplied Kosovo during the off-season when prices were high while Macedonia supplied during the main season when prices were lower. Significant reductions were registered in the imports of onions and carrots.

- **Tomato** imports increased by 11% and continued to peak in May, June and July – a period when production would be possible in Kosovo with improved indoor production.
- Imports of **Peppers** increased by 7% with the peak occurring in July – the month in which local peppers are beginning to be harvested. The type of pepper imported (long, yellow Duga bella) differs from the normal local speciality - Somborka – a yellow round spice type.
- **Cabbage** imports increased by 8% and comprised mainly early salad types (March to June). Macedonia was the major exporter with 93% of the total share by weight. The main production is located in the south (Gevgelija) where the earlier high temperatures give a comparative advantage over Kosovo for early production.
- **Cucumber** import increased by 1% and comprises two distinct types. Early imports (March – June) are salad types while late imports (September – October) are dedicated for home processing (pickling) along with gerkins.
- The import of **Onions** at 4,114 t decreased by 35% over 2005 – a reduction that was particularly marked in the off-season (January-June) – see Annex 1. The reason for this is not clear – particularly since little storage capacity exists in-country. A large reduction also occurred in July when sets planted in autumn are ready for harvest.
- The import of **Carrots** at 663 t also marked a significant decrease (40%) but, in contrast to onions, this was largely in the main local harvesting season. Imports of stored carrots showed little alteration. These events were reflected in the sourcing of imports. Macedonia was the main source of carrot imports in 2004 and 2005 – supplying the product during the main season. In 2006, however, Turkey became the principal supplier – delivering in the off-season and thus taking advantage of the lack of storage capacity in Kosovo.
- **Leeks, Garlic, Cauliflower, Spinach, Lettuce, Aubergines, Peas and Beans** have a limited impact in overall international trade in terms of weight and value.

Vegetable exports

The export of fresh temperate vegetables amounts to 2,260 t – a 134% increase over 2005 and representing 5.3% of the volume of imports. The main products exported are cabbages, onions, peppers and tomatoes - with Montenegro accounting for 76% of the total. Details of the export of individual products are presented in Annex 4.

- Exports of **Tomatoes, Onions and Cabbages** between January and June are almost certainly re-exports – while exports during the second semester probably relate to local production (and are therefore more significant). The main import countries are Montenegro and Albania due to their lack of local supply and the high demand during the summer tourist season.
- Export of **Peppers** occurred in August-October during the peak harvest season. The famous local variety Somborka constituted the bulk of the exported product and is bought mainly by Kosovars in Montenegro (as tourists) and in EU countries - Sweden, Switzerland, and Germany - where the main consumers are inhabitants with Kosovo origin.
- Exports of **Cucumbers, Cauliflower, Beans, Peas and Carrots** in terms of weight were lower than the other products and were mainly re-exports.

Discussion and Recommendations

Changing relationships with importing and exporting countries

Import

Albania increased its prominence as an exporter of fruit and vegetables to Kosovo since 2005 – rising from fifth to second place – largely due to a major increase in the export of watermelon. Albania is expected to continue to build its position in the Kosovo market at the expense of Macedonia and other countries such as Serbia and Greece. While its traditional linkages with Kosovo have always been an advantage, this expansion is put down to its recent large investment in production technology and marketing promotion. The completion of the new highway between Durrës and Prizren – expected in 2009 – and the on-going promotion of quality standards (EUROGAP) will further reinforce this trend.

Turkey and Macedonia will continue to be major exporters to Kosovo over the next 5 years – with Turkey dominating the export of early fresh vegetables e.g. tomatoes, peppers and cucumbers while Macedonia having an important share of pre-main season exports e.g. tomatoes, peppers, cucumber and apples.

Export

Montenegro and Albania show the most potential for accepting increasing exports from Kosovo (with Serbia and Bosnia Herzegovina also of interest). Main season production in Kosovo of vegetable indoor and field crops (e.g. tomatoes and peppers in July and August) coincides with the end of the main season in Albania. The new road from Durrës, in addition, is likely to open the main part of Albania to Kosovo production that is currently largely restricted to the northern areas around Kukës and Bajram Curri). The large numbers of Kosovo tourists in Montenegro in the summer months also provide a further opportunity for Kosovo produce.

Opportunities for import substitution

Some of the main opportunities identified for import substitution are mentioned below.

Greenhouse production: A continuing expansion and upgrading of Kosovo greenhouse production and post-harvest technology – especially in regard to tomatoes, peppers, cucumbers, lettuces, strawberries – offer considerable scope for import substitution – especially of the early season market.

Earlier field production: Several field crops offer potential of earlier production leading to further import substitution including watermelon (use of grafted hybrids, plastic), carrots, onions, apples (earlier varieties).

Storage: Simple on-farm storage linked to improved post-harvest handling (such as for onions, carrots and apples) provide a straightforward opportunity to tap the first half of the off-season market.

Recommendations for SPHPK

Based on the analysis of this report it appears that certain products (e.g tomatoes, peppers, cabbages, cucumbers, onions, watermelon, apple, pears, peaches and plums) have a twofold importance. Not only do they have a large local market demand but some of them also exhibit strong export potential. These products should therefore be considered strategic and the promotion of their value chains emphasised.

Quality improvement of products through post harvest activities (grading, cleaning) and improvement of packaging and branding of products with strong promotion events should be the main marketing activities.

The Project should promote the strengthening of linkages between traders in the region (especially Albania -then Montenegro and Macedonia).

Individual product recommendations

Recommendations for those products having considerable importance for the further development of the fruit and vegetable sector in Kosovo are presented below.

Watermelon

- Promote early types of watermelon varieties targeting June – August.
- Assess regions in Kosovo which have potential for early production.
- Identify export outlets for watermelon e.g. Albania, Romania, Bosnia.

Apples

- Assess comparative advantage of new locally-produced apple varieties compared to imported types.
- Support marketing promotion of new apple varieties, through different promotional events e.g. week of new Kosovo apples.
- Support promotion of nurseries involved in production of new apple planting material locally and abroad.

Pears, Plums, Cherries, Pears

- Assess potential for fresh market and for processing.
- Identify and support with production and marketing advice existing orchards with these fruits.
- Support establishment of new orchards.

Strawberries

- Identify and explore export potential of strawberries (eg Albania).
- Support marketing promotion of strawberry planting material both locally and abroad.

Raspberries, blackberries

- Explore and promote the market of both planting material and fruit.
- Explore feasibility of reinforcing current marketing channels through Serbia.
- Explore possibilities for linkages with processing factories in neighboured countries (e.g. Serbia, Macedonia, and Montenegro).

Tomatoes

- More support is required for existing tomato producers through the promotion of modern technologies and good agricultural practices.
- More promotion is needed of marketing activities e.g. standardisation of packaging, brand promotion activities and joint commercialisation.
- May, June, July should be especially targeted for import substitution from indoor production. During these 3 months import records are valued at €3,360.200¹⁰.
- July and August offer export potential to Albania and Montenegro, from indoor and open field production.
- The possibilities for developing linkages between farmers and Kosovo export traders as well as between traders in Kosovo, Albania and Montenegro need to be explored.

Peppers

- Promote early indoor production of yellow type hybrids of peppers¹¹ to substitute for the major imports occurring in May, June and July.
- Improve yield and quality of the existing type of *Somborka* peppers using hybrid seed.
- Improve yield and quality of the existing type of red peppers for home made and industrial processing using hybrids.
- The high-priced months of May, June, July should be target for the yellow type of peppers.
- August, September are months with export demand for *Somborka* type peppers. Project could play a crucial role in identifying export outlets and building linkages between interested traders and producer association or group of producers.

Cucumbers & gherkins

- Promote the early salad type targeting April-June.
- Promote the late gherkin type targeting September and October – the main season for home and industrial processing

Onions & Carrots

- Promotion is required for post-harvest activities (grading, storage, standardisation of packaging, labelling, linkages).
- Export opportunities should be identified for carrots.
- No further encouragement of carrot production should take place in order to avoid a glut on the local market – until export markets are identified.

Cabbage

Assess the comparative advantage of locally-produced cabbages in terms of production seasonality and profitability compared to Macedonian import

¹⁰ Sum of imported value for May, June and July.

¹¹ Long yellow type

Annex I

Figure 1, Import of onions 2005-2006 (t)

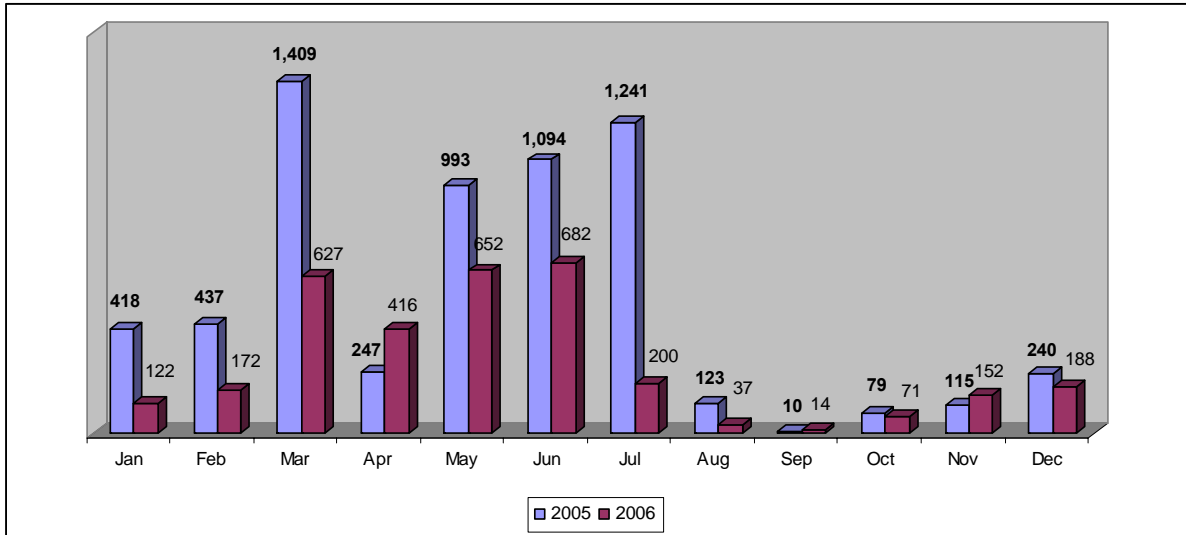
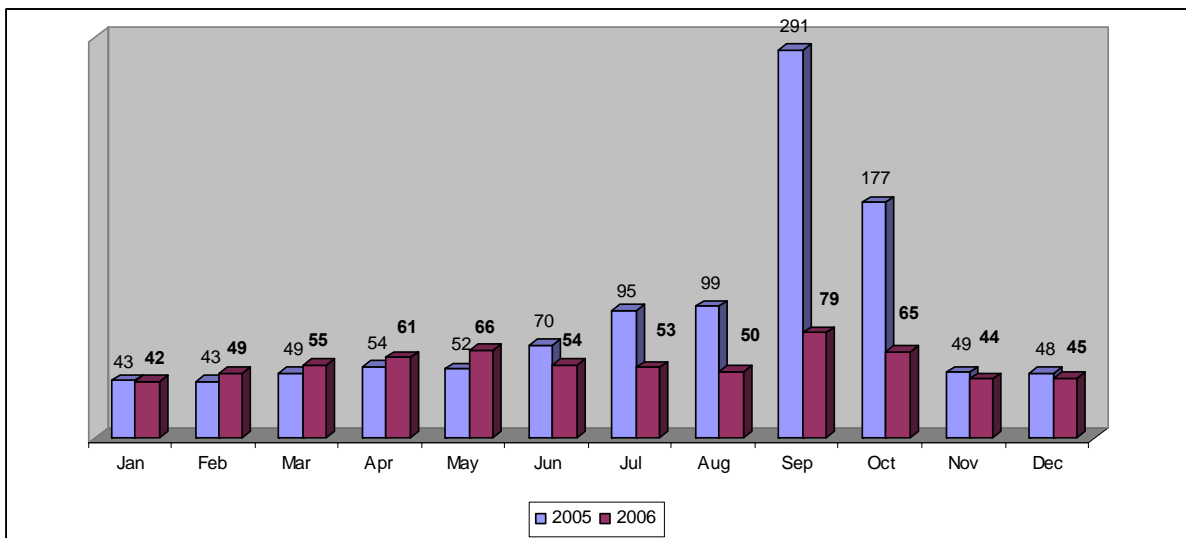


Figure 2 Import of carrots 2005-2006 (t)



ANNEX II

Import of Fresh Fruits into the Kosovo (t)

Produce	2005	2006	Change %
Watermelon	13,592	20,433	50.3
Apple	11,716	10,759	-8.2
Grape	3,278	1,896	-42.2
Pear	986	981	-0.5
Peach	845	926	9.5
Nectarine	844	691	-18.1
Plum	281	475	69.2
Melon	409	412	0.8
Strawberry	265	235	-11.3
Apricot	299	211	-29.5
Cherry	178	139	-21.6
Blackberry	2	5	175.4
Raspberry	0.6	1.4	123.8
Total imports	32,695	37,165	13.7
<i>(Total imports minus watermelon)</i>	<i>19,103</i>	<i>16,732</i>	<i>-12.4</i>

Import of Fresh Fruits by country of origin (t)

Country	2005	2006	Change %
Macedonia	19,557	24,651	26.05
Greece	8,029	2,678	-66.64
Serbia	3,280	1,332	-59.40
Albania	891	6,660	647.07
Turkey	860	484	-43.68
Italy	752	833	10.66

ANNEX III

Import of Fresh Vegetables (t)

Produce	2005	2006	Change %
Tomato	15,563	17,313	11.24
Pepper	7,354	7,872	7.04
Cabbage	5,321	5,771	8.45
Cucumber	4,672	5,373	15.01
Onion	6,405	4,114	-35.77
Leek	431	683	58.53
Carrot	1,069	663	-37.96
Beans	122	217	77.66
Lettuce	103	197	91.13
Garlic	168	162	-3.64
Spinach	137	154	12.29
Aubergines	87	97	11.35
Peas	40	42	5.48
Cauliflower	160	26	-83.49
Total imports	41,632	42,684	2.53

Import of Fresh Vegetables by country of origin (t)

Country	2005	2006	Change %
Macedonia	21,078	19,946	-5.37
Turkey	13,911	14,806	6.43
Syria	2,284	2,852	24.87
Serbia	2,109	806	-61.78
Netherlands	1,773	-	
Austria	1,560	737	-52.74
Greece	-	1,326	

ANNEX IV

Product Mix of Kosovo imports (t), 2006					
Fruits imports			Vegetables imports		
Produce	Tonnes	Percentage	Produce	Tonnes	Percentage
Watermelon	20,433	54.9	Tomato	17,313	40.5
Apple	10,759	28.9	Pepper	7,872	18.4
Grape	1,896	5.1	Cabbage	5,771	13.5
Pear	981	2.6	Cucumber	5,373	12.5
Peach	926	2.4	Onion	4,114	9.6
Nectarine	691	1.8	Leek	683	1.6
Plum	475	1.2	Carrot	663	1.5
Melon	412	1.1	Beans	217	0.5
Strawberry	235	0.6	Lettuce	197	0.4
Apricot	211	0.5	Garlic	162	0.3
Cherry	139	0.3	Spinach	154	0.3
Blackberry	5	0.0	Aubergines	97	0.2
Raspberry	1.4	0.0	Peas	42	0.1
Total imports	37,165	100	Cauliflower	26	0.0
			Total imports	42,684	100

Product Mix of Kosovo exports (t), 2006					
Fruits export			Vegetables export		
Produce	Tonnes	Percentage	Produce	Tonnes	Percentage
Watermelon	241.00	58.8	Cabbage	971.00	42.9
Grape	124.00	30.2	Onion	840.00	37.1
Apple	19.00	4.6	Pepper	225.00	9.9
Pears	12.00	2.9	Tomato	182.00	8.0
Cherries	6.30	1.5	Cucumber	26.00	1.1
Raspberries	4.36	1.0	Cauliflower	5.00	0.2
Blackberry	2.17	0.5	Beans	5.00	0.2
Strawberries	0.33	0.0	Peas	5.00	0.2
Plums	0.20	0.0	Carrot	0.20	0.0
Total export	409.36	100	Total export	2,259.20	100