

OBJECTIVES AND METHOD

- ⇒ To gain insight in the Balkan fruit industry
- ⇒ To identify barriers of fruit consumption

- ⇒ Qualitative research, in-depth interviews, face to face
- ⇒ Countries Croatia, Slovenia, Montenegro, FYR Macedonia, Serbia and Bosnia and Herzegovina
- ⇒ Participants each country: 4 representatives of the processing industry and 2 representatives of the authorities responsible for the fruit processing sector



Actual fruit consumption

Consumption of fresh and processed fruit is increasing
 Most consumed fruit in West Balkan: apple
 Lower consumption of fruit than in EU countries
 Processors mainly satisfied with consumption of their products

Description of consumers

Heavy fruit users / high quality products
 ⇒ women
 ⇒ people with higher economical status
 ⇒ people with higher education
 ⇒ population of urban areas

Light users/low quality products

⇒ people with lower education
 ⇒ people with lower income
 ⇒ men

Important factors influencing fruit consumption:

- ⇒ consumer nutrition knowledge, health dimension of food in general
- ⇒ public policy and trends
- ⇒ expecting future growth of consumption of quality processed fruit and growing market share of such products.

Importance of domestic and imported processed fruit

Domestic fruit products	Imported fruit products
Main strengths <ul style="list-style-type: none"> • Quality of raw materials • Optimal price / quality ratio • Trust among consumers 	Main strengths <ul style="list-style-type: none"> • Well known brands • Advertising • Packaging and design • Stereotype "foreign is good"
Main weaknesses <ul style="list-style-type: none"> • Lack of uniformity of products • Packaging and design • Advertising budgets 	Main weaknesses <ul style="list-style-type: none"> • Expensive • Lower proportion of fruit • Not always accompanied by quality



Importance of the family fruit orchards and homemade processed fruit

- ⇒ Family orchards are typical for the West Balkan
- ⇒ No official data, therefore no official estimates of the share in overall production
- ⇒ Different estimates for each country
- ⇒ Difference is being made between home grown

National health policies

- ⇒ Level of awareness and education is still insufficient, although it is rising
- ⇒ State programs are assessed as unsatisfactory or even non-existing
- ⇒ Slovenia is the only country where fruit consumption is included in National health Program
- ⇒ Respondents agree that fruit consumption should be promoted

Analysis of the fruit industry sector in the country

Main strengths <ul style="list-style-type: none"> • Climate conditions • Traditional way of growing and processing • Prices • Membership in CEFTA 	Main weaknesses <ul style="list-style-type: none"> • Technology • Access to commercial credits • Monitoring of products safety
Main opportunities <ul style="list-style-type: none"> • Growth in exports • Increase in primary production • EU and government support for production and rural development • Creating brands and value added products (organic) 	Main threats <ul style="list-style-type: none"> • Concentration of retailers • Well-organized producers from EU countries • Lack of organization in the product chain



Governmental objectives and actions to help the sector

- ⇒ Updating fruit assortment and updating technology
- ⇒ Adapting and building of (new) capacities
- ⇒ Participating in agricultural fairs and other international significant events
- ⇒ Supporting for evolutionary, experimental and research activities
- ⇒ Educating and training of farmers-producers
- ⇒ Introducing international standards for fruit quality, both in primary production and in fruit processing

