

REPORT ON ORGANIC SECTOR IN R. MACEDONIA

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Production

- Organic production in Macedonia is still in an early stage of development. Out of the total agricultural area in Macedonia, the organic share is around 1%.
- According to governmental statistics the organic agricultural area increased from 226 ha in 2005 to 1,056 ha in 2009. The number of organic farms expanded from 50 in 2005 to 264 in 2009. By 2011, the Macedonian government would like the overall share of organic agriculture to account for 2% of agricultural area.
- IFOAM and FIBL mention in "The world of organic agriculture 2009" slightly different data. 2005: 249 ha, organic share 0.002%; 2006: 509ha; 0.04%, 2007: 1,333 ha, 0.11% (IFOAM, FIBL). In 2009 there are 99 organic producers cultivating 3,380 ha organic agriculture land. That is a share of total agricultural land of 0.31 %.

Crop Production (in ha)	2009
Cereals	402 ha
Other crops from arable land	129 ha
Pastures and prairies	106
Vegetables	142 ha
Fruits	211 ha
Wine	60.17 ha
Animal Production (head of animals)	
Dairy cows	377
Sheep	22,058
Goats	1,039
Pigs	5
Bee families/Beehives	15,455

Certification

- The national legislation “Law for organic agriculture (Official Gazette No. 146/2009) valid from 01/01/2010 is fully harmonized with EU ACQUIS (European Regulation (EC) No 834/2007 and 889/2008 on organic production and labelling of organic products)” is providing the legal bases for the organic production.

Year	Number of beneficiaries	financial support
2005	50 farms	97,500 EUR
2008	226 farms	815,000 EUR

According to the national law on organic agriculture has the expert control of organic producers, processors and traders to be conducted by registered inspection bodies. These bodies must have headquarters in the country, employ at least three staff persons and be accredited. Several foreign international certification bodies are present in the country. Since 2005 Balkan Biocert, a product of international partnership (FiBL (Research Institute of Organic Agriculture, Switzerland), IMO (Institute for Market Ecology, Switzerland) and Bioselena (Foundation for Organic Agriculture, Bulgaria)), has a branch office in Macedonia. In 2009 the first Macedonian certification body PROCERT started its activity, which has been accredited by the National accreditation institute in charge (www.iarm.gov.mk), which has applied for accreditation in the field of organic agriculture

The Organic Market in Macedonia

- Organic production in Macedonia is still not developed sufficiently in volume and diversity in order to be able to implement sustainable marketing activities of organic products.
- There are single initiatives for selling organic products locally, on green markets and on farm sales, but yet there is little demand and insufficient knowledge about organic agriculture among consumers. For the moment, there are no organic shops with the exception of several specialized health shops , where consumers can find mostly domestic organic products.
- In recent years organic products could be found also in supermarkets from time to time and this trend is increasing.

The organic market actors

- Companies like Alkaloid (organic herb teas from wild collection), Vitalia (organic jams), Vinarija Grkov (organic wine), Kastel, Intermak (mushrooms) are pioneers in processing of organic products.
- There are few processing companies operating in organic industry. Two companies are processing and trading wild collected products and producing for example dried herbs/tea and mushrooms preserved and processed fruits (mostly wild berries) as well as juices, juice concentrate and jams.
- Most of the production is export oriented, due to the limited local market in our county. Another company is producing vinegar. Furthermore there are some capacities for processing on the farmers level (e.g. honey, juice, bread, essential oils).
- Most of such activities so far were aiming at the national promotion of organic food. In Prilep, Bitola and Rosoman over the past few years, and this year also in Skopje, organic market stands were opened where organic food was sold under the logo "Tasty Organic Food". With the purpose to promote organic food among consumers some events were organized, such as the Organic Day in Strumica.

FINAL COMMENTS

- Since there is no continuous supply of domestic organic processed products in adequate quantities it is not possible to set attractive selling points. Furthermore most processing companies are demanding organic raw materials (not in conversion) and they have difficulties to process small and not standardized quantities of organic products. Fresh vegetables and fruits are often sold as conventional since the costs for distribution in the organic supply chain are high and there are limited financial resources on primary producer level. In order to be competitive, in the future, organic producers need to plan jointly and organize better access on domestic and international markets.
- In Macedonia exists an association of organic producers that strongly influences the development of organic production in the country. There is a national law on organic production, which had already been established in 2004. Meanwhile there is a national certification body, Procert, controlling the organic production. Furthermore a governmental financial support programme promotes the development.
- Organic production in Macedonia is still not developed sufficiently in volume and diversity in order to be able to implement sustainable marketing activities of organic products. Barriers: no continuous supply of domestic organic processed products in adequate quantities. Small and not standardized quantities. Cost of distribution.