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Delphi I Round Report

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What are the most important influences that have shaped the development of the organic market in your home country in the past 10 years? (Please describe key events if appropriate).

- SIPPO – Swiss, IMO – Swiss, GTZ – Germany, KRAV and SIDA Sweden, USAID
- BIOFAH Nurnberg, Germany
- National governmental support
- OK Organic Control (nat. body cert. By IFOAM)
- Awareness, Price rate . . .

How would you describe the current state of the organic market (including regional variants if any)?

- small
- not organized and
 - undeveloped
 - but is existing.

- only few organic products that can be found in the sales
- missing diversity of products (fresh or processed)
 - missing marketing and presentation of the products

- Nevertheless some big shop chains introduced separate departments for selling those products
- cover just 1% of the market when compared to the conventional

- producers are therefore more orientated to export



How do you expect the organic market to develop over the next 10 years? (Please include important new influences not discussed in previous answers).

- The majority of respondents said that organic market has no growing perspectives locally
- should continue to develop if strongly support
- organic market will have high rate growth in coming ten years
- It is expected that law regulations as to be there.

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Describe the motives you find in organic food consumer's behavior (including typical consumers profile).

- Educated, more wealthy and urban part of society
 - Sometimes people with health problems
- More important and popular products to the BIH consumers are traditional products that are representing big competitive issue to the organic products.

How organic food initiatives had an influence on economic, ecological or social development in disadvantaged areas of your country?

- economic development specially noticed in rural areas and smaller cities.
 - export in general is increased.
- mainly raw materials is certified and exports as organic but not finally products.
- Some plants are completely endangered like *Gentiana lutea* L. (yellow gentian) due to the collection.
- environmental issue is of matter as organic conception is taking care of natural sustainability.⁶

What characteristics make an organic food distribution channel chain successful? (Please give concrete examples, if appropriate)

- Generally speaking organic food distribution channel in BIH is not that successful and that is one of the weakest points in organic food chain.
- Successful big companies that are dealing with the organic production usually have one ino-partner behind them and then the chain is closed.
- What would be interesting for the success is direct sales e.g. organic products market.

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