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ORGANIC AGRICULTURE IN THE REPUBLIC OF MACEDONIA: POTENTIAL, GOVERNANCE, POLICY FRAMEWORK AND MARKET

SUMMARY

The first strategic organic agriculture (OA) activities in Macedonia happened around 2000. Despite the country's huge agro-ecological potential only during last decade there was a significant OA development thanks mainly to governmental financial support schemes, market opportunities and an enabling environment. The paper aims at providing an insight into Macedonian organic agriculture with a focus on governance, legal and political framework and market. It is mainly based on secondary data from the specialised literature. The work (i) analyses historical development and potential for and SWOT of Macedonian OA; (ii) examines legal and policy framework (*e.g.* Strategy for Organic Agriculture) and its alignment with the *acquis communautaire*; (iii) investigates roles of main public and civil society institutions involved in organic policy design and implementation (*e.g.* ministries; bureaux; agencies; bodies; institutes; Biomak and Biosan federations, associations) as well as international organisations (*e.g.* FiBL, SIDA, GTZ); and (iv) analyses Macedonian organic agro-food production - plant and animal production, wild collection and beekeeping – as well as processing, distribution and marketing; mainly linkages with international supply chains, and market actors and their roles. More than 200,000 ha of wild collection; more than 1,000 ha of arable land - mainly cereals, vegetables and fruit -; thousands of animal heads – especially dairy cows, sheep, goats and pigs - as well as thousands of beehives are certified organic. The sector is linked to international supply chains and is export-oriented. Domestic market is still quite small. Macedonia is in an early stage of organic food production, processing, distribution and marketing. Organic production is still not developed sufficiently in volume and diversity. Further growth is expected as a well-structured NGO network and a committed national policy push the organic sector.

Keywords: organic agriculture; Macedonia; governance; market.

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INTRODUCTION

The pioneer in organic farming was Sir Albert Howard and this concept was developed in the middle's of 20th century (Heckman, 2006). Organic agriculture (OA) is defined by the IFOAM (International Federation of Organic Agriculture Movements) as "*agricultural systems that promote environmentally, socially and economically sound production of food and fibres*". It is based on the principles of health, ecology, fairness and care. It is a system of production that maintains the health of people, ecosystems and soil and also combines tradition, innovation and science in order to benefit the shared environment, promote fair relationships and a good life quality (IFOAM, 2009).

In 2010, the share of organic in total agricultural land was 0.9% worldwide, 1.9% in Europe and 4.7% in the European Union (EU). About 1.8 million organic producers manage more than 37 million hectares of agricultural land organically in 160 countries. Organic agriculture is the most practiced in Oceania (12.2 million ha), Europe (9.3 million ha), and Latin America (8.6 million ha). Organic farming support in Europe encompasses legal protection, rural development programme grants and European and national action plans (Willer and Kilcher, 2011).

In the EU farmland under organic cultivation has increased 8-10% per year during the last decade (Richter and Padel, 2007) as a response to the growing demand for organic food. Current retail sales value is €18 billion. Demand is growing much faster than domestic production so imports from third countries, including Balkan countries, have increased as well (März *et al*., 2011).

In transition economies, such as the Balkan ones, the idea that OA could be a strategic sector, largely stems from the fact that their agricultural systems are characterized by a relatively limited use of synthetic fertilizers, herbicides, pesticides, etc. (Vittuari, 2011).

From 2000 onwards, the organic movement in the Western Balkan Countries (WBC) experienced new dynamics pushed by committed organic farmers' associations, market supply chain actors, consumer groups and associations, civil society organisations dealing with rural development and environmental protection, or agro-food policy makers (Renko *et al*., 2010a).

Significant influence comes from the legal framework of the EU. Entrepreneurs and market actors from the WBC and foreign investors want to have a EU-compatible legal framework established in WBC. These forces pushed towards official recognition and labelling of organically produced and processed products. Once a legal and institutional framework on organic production and labelling is established, an enhancement of product quantity and qualily is observed (Renko *et al*., 2010a).

In the Republic of Macedonia, agriculture plays an important role in rural areas development, foreign trade balance, jobs creation and contribution to the gross domestic product (GDP). The average share of agricultural sector in Macedonian GDP is around 12% (Angelovski and Bicikliski, 2009).

The paper aims at providing an insight into Macedonian organic agriculture with a focus on historical development, potential, governance, legal and political framework and market.

MATERIAL AND METHODS

The paper is mainly based on a literature review. A considerable number of literature sources have been consulted for preparing this review paper. The desk research encompassed collection, analysis, cross-checking and validation of data from available reports, research papers and databases. The paper analyses historical development and potential for developing OA in Macedonia. It provides a SWOT analysis of Macedonian OA. It analyses the legal and policy framework and its alignment with the *acquis communautaire* as well as schemes for supporting financially organic operators. The paper provides as well a mapping of the main public and civil society institutions involved, directly or indirectly, in organic policy design and implementation. It analyses organic production in terms of plant and animal production as well as wild collection and beekeeping. The paper adopts a supply chain approach as it focuses not only on production but also on processing, distribution and marketing of Macedonian organic agro-food products. A special attention has been paid to linkages between Macedonian organic sector and international supply chains as well as the market actors and their roles.

The main difficulty faced during the course of this work was the lack and/or difficult access to adequate and updated data regarding organic farming in Macedonia. Inconsistency of information from different sources was another problem faced during the preparation of this paper.

RESULTS AND DISCUSSION

Macedonia has a significant potential for developing the organic sector considering its extensive traditional agriculture production and favourable climatic and soil conditions (Angelovski and Bicikliski, 2009). It is the right place to develop organic agriculture as traditional methods in agricultural production are still in use, synthetic fertilizers and pesticides are already used with moderation and large areas are free from pollution. Moreover, Macedonian private agricultural businesses are mostly family-owned and over 50% have less than 1.5 hectares. The recognition by public institutions of this potential, also demonstrated by a significant financial support, is an important step forward (Vittuari, 2011).

The United Nations Environmental Program (UNEP) has identified organic agriculture as a sector of special interest - within an initiative on green economy - in order to support exports, jobs, and incomes in Eastern Europe and Central Asia. UNEP and IFOAM started a study on the potential economic and environmental benefits of large-scale investments in the promotion of sustainable agricultural practices. There is a growing body of evidence on the organic sector's contribution to sustainability in terms of water management, soil management, biodiversity protection and jobs creation in rural areas. Organic agriculture has, thus, become fully included in the range of practices that should support the transition to a green economy (Vittuari, 2011).

However, although the share of agricultural land in total area in Macedonia is 49%, organic farming is still in an initial development phase (Angelovski and Bicikliski, 2009). Nevertheless, Macedonia is a leader in the region in terms of financial support and measures for larger development of organic agricultural production. The results of a SWOT analysis of organic agriculture in Macedonia are presented in Table 1.

A series of major problems still hinder further organic sector development in Macedonia: lack of information about organic products; the distrust to the information on the label and lack of promotional activities; lack of purchase power and little acceptance of paying price premiums for organic products; low organic products availability; and lack of domestic supply chains. Once these barriers removed, the organic sector is likely to undergo comparable developments as in other European countries (Renko *et al*., 2010a).

Table. 1. Strengths, weaknesses, opportunities and threats of the Macedonian organic agriculture sector.

Strengths	**Weaknesses**
-Favourable environmental conditions and good natural capital; -Experienced farmers; -Established institutional system (*e.g.* Advisory Coordination Commission for OA, certification bodies, accredited inspection bodies); -Adopted Law on OA in line with EU regulation; -National support schemes for OA; -Low labour cost; -Existence of active OA associations; -Existence of a policy framework for OA; -Traditional production methods; -Conventional production with minimum use of synthetic pesticides and fertilizers.	-Limited availability and high prices of organic farm inputs; -Insufficient investments in OA; -Lack of well-trained advisors and extension agents; -Underdeveloped organic domestic market; -Insufficient and unorganized offer of organic products; -Limited organic agriculture research; -Insufficient infrastructure (*e.g.* storage facilities); -Lack of accredited laboratories; -Low capacity of the processing industry; -Limited funds to support OA.

Opportunities	Threats
- Increasing interest for organic production in Macedonia; -High demand for organic products in the EU and US; -Increased farmers' income as prices of organic products are higher than conventional ones (*i.e.* premium price); -Active international cooperation and support for OA by international donors; -Institutional support for OA; -Revitalization of abandoned rural areas with potential for OA development; -Development of rural and eco-tourism.	- Low domestic demand for organic products; - Slow development of OA and access to international markets; - Competitiveness with foreign organic products; - Increased administration obligations without adequate advisory support; - Increased costs for inputs and services (*e.g.* certification); - Introduction of GMOs; - Inconsistent and irregular government support; - Scandals and frauds in the organic sector; - Orientation towards export and high sensitiveness to the economic crisis impacts.

The first OA initiative in Macedonia dates back to 1997 when Alkaloid pharmaceutical company from Skopje inspected its wild collection. However, the first significant activities in the field of OA happened around 2000. In the same year organic farmers started organizing themselves locally in civil associations. A fundamental support at that phase was provided by FIBL (Research Institute of Organic Agriculture in Switzerland) and SIPPO (Swiss Import Promotion Programme). The first organic inspection took place by the end of 2003, and the first organic certificate was issued in 2004 (Trajković, 2009) thanks to a project financed by Swiss Cooperation together with FiBL aiming at producing organic persimmons to be exported through the SIPPO program (Vittuari, 2011).

Macedonia is an excellent example of a country where the development of organic farming was initialised and pushed mainly by the civil society. Organic farmers and processors run efficient and committed associations that co-develops the governmental strategy for organic farming (Renko *et al.*, 2010b).

In 2003, local associations joined together in a national organic federation, called Biomak, headquartered in Kavadarci. Soon the federation was joined by companies interested in organic agro-food processing and trade as well as other associations; which was not very welcomed by the organic farmers. Therefore, in July 2006 a new purely farmers' and purely organic Macedonian Federation of Organic Producers "Biosan", headquartered in Skopje, was registered (Trajković, 2009).

Biosan's primary role is to guide and coordinate the activities of local organic farmers' associations. Furthermore, Biosan represents the interests of organic farmers and is active in promoting OA at national level. At the moment Biosan brings together eight local organic associations from Valandovo, Gevgelija, Strumica, Pehčevo, Sveti Nikole, Kumanovo, Skopje and Gostivar. Biosan's activities are mainly focused on (Trajković, 2009): compilation of a general, common and unified database of organic producers and products; education and training; advisory services; marketing of organic products; establishment of distribution links and common purchase of allowed inputs; and international cooperation. Biosan carries out crucial activities aimed at the promotion of organic values and offers training and consultancy services to growers (Vittuari, 2011).

At the moment Biosan is the basic, the biggest and the leading engine of the organic movement in Macedonia. As such, Biosan closely cooperate with the Ministry of Agriculture, Forestry and Water Economy (MAFWE); the Ministry of Environmental and Physical Planning; agricultural, research, training and education institutions, etc. (Trajković, 2009). Other main institutions dealing with Macedonian organic agriculture include the Institutes for Accreditation and Standardization; the National Extension Agency; inspection and certification bodies, etc. The Ministry of Education and Science approved the introduction of organic agricultural production as an elective subject in the fourth year of secondary education in agricultural schools from September 2007.

Biosan develops fruitful cooperation with international donors dealing with organic agriculture (Trajković, 2009). In fact, the organic farming sector in Macedonia has been characterised by the presence of many international donors and financial institutions such as FiBL, SIDA, Swiss Development Cooperation (SDC); GTZ; etc.

The main activities carried out by these actors include initiatives for market development and the creation of specific distribution channels (Vittuari, 2011).

In 2001, a process started for the definition of a framework law, that was approved in 2004. A proper revision of the legislative framework was carried out in 2009, with the introduction of the law n. 146 on Organic Agricultural Production, fully consistent with European Regulations 834/2007 and 889/2008 (Vittuari, 2011).

Nowadays, Macedonia has a national regulation for organic agricultural production (Official Gazette No. 16/2004 and 89/2008). In order to make Macedonian organic production competitive, the Law on organic agricultural production, adopted in April 2004, was in line with the EU regulation. It regulates the general provisions related to the production, processing, marketing and labelling of organic production and applies to all types of organic agricultural products intended for human consumption and animal feeding. The Law also provides the basic conditions for organic inspection and certification (Trajković, 2009).

At the institutional level, a significant step was undertaken with the approval of the National Strategy and Action Plan for organic agriculture 2008-2011 that set important targets for 2011, such as 2% and 5% of the total agricultural surface, for organic agriculture and collection of wild plants, respectively; increasing the range of certified products and the number of processing firms; the consolidation of export channels and raising the awareness of local consumers on the values of organic farming. In addition, goals include the harmonization of domestic laws with the European framework and the development of the human and technical resources in the institutions involved in the organic certification and inspection (Kendrovski, 2010; Vittuari, 2011). The political strategy for organic agricultural production development includes direct financial support to organic operators. Manuals have been devised on the registration of organic producers, processors and traders, organic products labelling and recognition of foreign certification bodies (Kendrovski, 2010).

The Law for organic agriculture (Official Gazette No. 146/2009), valid from the first January 2010, is fully harmonized with EU *Acquis* [(European Regulations (EC) No 834/2007 and 889/2008 on organic production and labelling of organic products)] (Trajković, 2009).

There are references to organic agriculture in other national strategies and policies such as those dealing with agriculture and rural development, sustainable development, environment, biodiversity.

The legislative framework matches European standards and funds are increasing (Vittuari, 2011) as the national agriculture policy provides subsidies for organic farming and is engaged in advisory services (Renko *et al*., 2010b). In fact, the MAFWE introduced financial governmental support. It marked €97,500 for supporting organic agriculture in 2005 and 50 organic farmers registered to receive state support (Kendrovski, 2010). Since 2005, there has been an increase in public support and organic growers, and an extension of the cultivated surface (Vittuari, 2011). In 2008 the budget of government support for the organic agriculture increased to €815,000 and 226 organic farmers successfully received state support (Kendrovski, 2010). Recently the organic sector has increased its incidence on the budget for agriculture: from less than €100,000 of 2005 to more than a million Euros in 2009 and 2010, with funds divided along the supply chain (production, processing, and marketing) (Vittuari, 2011).

In Macedonia**,** certification for organic products exists since 2005, at first as a result of international cooperation (Renko *et al*., 2010b). Several foreign international certification bodies are present in the country. Since 2005 Balkan Biocert, a product of international partnership [FiBL, IMO (Institute for Market Ecology, Switzerland) and Bioselena (Foundation for Organic Agriculture, Bulgaria)], with headquarters in Plovdiv (Bulgaria), has a branch office in Macedonia. In 2009 the first Macedonian certification body, Procert, started its activity. Both are accredited by the National Accreditation Institute (Kendrovski, 2010; Vittuari, 2011).

Organic production in Macedonia is still in an early stage of development. However, during last year's there was a significant OA development mainly due to governmental subsidies (Trajković, 2009). Progress was noticeable as land under organic production increased to around 1% in 2009 (Angelovski and Bicikliski, 2009).

According to the world of organic agriculture (Willer and Kilcher, 2010) more than 200,000 ha for wild collection and more than 1,000 ha of arable land (mainly cereals, vegetables and fruit) are certified organic. Moreover, thousands of animal heads are certified organic especially dairy cows, sheep, goats and pigs. There are as well thousands of organic beehives.

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 increased from 50 in 2005 to 264 in 2009 (Kendrovski, 2010). The surface cultivated with organic agriculture grew significantly to over 5,000 in 2010 – close to the 2% target set by the Strategy for Organic Agriculture 2008-2011. Organic bee-keeping, counts over 15,000 certified beehives – 15% of the total beehives. In 2010, over 500 certified organic producers grew cereals (wheat, barley, oats), fruit and vegetables (plums, apples, nuts, almonds, hazelnuts, potatoes), and raised animals (mostly sheep and goats). Other important opportunities could stem from agro-food processing (jams, cheeses, teas) and organic viticulture (Vittuari, 2011).

In the WBC organic markets are, compared to some of the organic markets in Western Europe, relatively young, very small and in an early stage of development. Nevertheless, there is a growing interest by the consumers to buy organic food products. This goes along with the overall trend towards a more health-oriented life style and growing concerns about sustainable development (Renko *et al*., 2010a).

Macedonia is in an early stage of organic food processing and marketing. Domestic processing is concentrated on the conditioning of wild collection products. The sector is traditionally linked to international supply chains and is export-oriented. Domestic supply chains are short and lack sufficient quantities and marketing possibilities. Organic distribution is in its beginnings. Farmers' markets play a pioneer role (Renko *et al*., 2010a). Despite the significant progress, the overall market is, however, still underdeveloped (Vittuari, 2011).

There are few processing companies operating in the Macedonian organic industry. Alkaloid (organic tea), Vinarija Grkov (organic vine), Vitalia (organic marmalade) and Kastel i Intermak (mushrooms) companies are pioneers in organic products processing (Kendrovski, 2010; Renko *et al*., 2010b). Some companies produce dried herbs, preserved and processed fruits (mostly wild berries) as well as juices, juice concentrate and jams. Most of these productions are export oriented. Furthermore, there are some on-farm processing capacities (*e.g.* honey, juice, bread, essential oils) (Kendrovski, 2010).

Organic production in Macedonia is still not developed sufficiently in volume and diversity to allow implementing sustainable marketing activities and domestic market is still quite small. In fact, there is not a sufficient market for organic products to stimulate production and market development is hindered by the lack of quantity and quality (Kendrovski, 2010). Dynamic NGO and committed policy push organic agriculture development, but domestic distribution is strongly limited. Domestic demand is concentrated in bigger cities and the existing supply chains are export-oriented (Renko *et al.*, 2010b).

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. There are no organic shops with the exception of several specialized and health shops. In recent years organic products could be found also in supermarkets from and this trend is increasing (Kendrovski, 2010). Organic products are mostly sold in supermarkets and small, open-air markets like those of Bitola, Prilep, Rosoman, and Skopje (Vittuari, 2011). In these cities, there are organic market stands selling organic food under the logo “Tasty Organic Food” (Kendrovski, 2010). Only some of the supermarkets sell products from local organic farmers. Macedonia does not have organic food innovative retail selling channels such as on-line shops (Renko *et al.*, 2010b).

Other activities include selling freshly squeezed fruit juices in several cafe bars and direct selling of selected products (*e.g.* honey, bread, fruits). With the purpose to promote organic food among consumers some events were organized, such as the Organic Day in Strumica (Kendrovski, 2010).

Since there is no continuous supply of domestic organic processed products in adequate quantities it is difficult to build lasting supply chains for the domestic market. Furthermore, most processing companies have difficulties to process small and not standardized quantities of organic products. Fresh vegetables and fruit are often sold as conventional since the costs for distribution in the organic supply chain are high (Kendrovski, 2010).

Organic consumption in Macedonia is still in its beginnings. Consumers discover the organic offer on green markets in bigger cities (Renko *et al.*, 2010b). In order to be competitive organic producers need to plan jointly and organize better access to domestic and international markets (Kendrovski, 2010).

CONCLUSIONS

Considering its climate and soil conditions, Macedonia has a significant potential for developing the organic sector especially crop production, beekeeping and wild collection. With aggressive marketing and high support from the government this sector could emerge as one of the most developed sectors of agriculture in Macedonia and it could decrease the agro-food trade balance. The recognition by public institutions is an important step forward. What is needed is that producers and civil society organisations dealing with organic agriculture in Macedonia consolidate the organic supply chain and promote organic values among domestic consumers. For that external support by international organisations and donors is needed.

Macedonia is in an early stage of organic agro-food production, processing, distribution and marketing. Organic production in Macedonia is still not developed sufficiently in volume and diversity for allowing sustainable marketing activities. Domestic market is still quite small. However, Macedonian organic agriculture is gaining ground. Further growth is expected as a well structured NGO network and a committed national policy push the organic sector. The sector is linked to international supply chains and is export-oriented.

The Ministry of Agriculture, Forestry and Water Economy is the main public institution responsible for organic production policy design and implementation. Biosan association strongly influences the development of Macedonian organic production. There is a national law on organic production since 2004 and a national certification body, Procert. Furthermore, a governmental financial support programme promotes organic agriculture development.

The organic agro-food system in Macedonia, with its ethical foundation and IFOAM principles, can model and has the potential to inspire broader transformation processes not only in agriculture and food system but also environment, health, rural development and society as a whole. Organic agriculture development can bring about sustainable social, economic and environmental benefits therefore measures for supporting producers should be strengthened and domestic market should be stimulated.

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ORGANSKA POLJOPRIVREDA U REPUBLICI MAKEDONIJI: POTENCIJALI, SISTEM UPRAVLJANJA, POLITIKE I TRŽIŠTE

SAŽETAK

Prve strateške aktivnosti u vezi organske poljoprivrede (OP) u Makedoniji su počele oko 2000-e godine. Iako Makedonija ima ogroman agroekološki potencijal, tek u poslednjoj deceniji došlo je do značajnijeg razvoja OP uglavnom zahvaljujući vladinim šemama finansijske podrške, tržišnim mogućnostima i podsticajnog okruženja. Rad ima za cilj da pruži uvid u Makedonsku organsku poljoprivredu sa fokusom na sistem upravljanja, pravni i politički okvir i tržište. Rad je uglavnom zasnovan na sekundarnim podacima iz specijalizovane literature. Rad (i) analiza istorijski razvoj i potencijal OP u Makedoniji, a takođe uključuje i SWOT analizu; (ii) razmatra pravni i politički okvir (npr. Strategija za organsku poljoprivredu) i njegovu usklađenost sa *acquis communautaire* (iii) istražuje uloge glavnih javnih institucija i organizacija civilnog društva uključenih u dizajniranje i implementaciju politika organske poljoprivrede (npr. ministarstva, biroi, agencije, državna tijela, instituti; Biomak i Biosan savezi, udruženja), kao i međunarodnih organizacija (npr. FiBL, SIDA, GTZ); i (iv) analizira Makedonsku organsku poljoprivrednu proizvodnju hrane (biljna i životinjska proizvodnja, sakupljanje šumskih proizvoda i pčelarstvo), kao i preradu, distribuciju i marketing; analizira veze sa međunarodnim lancima snabdevanja i tržišnim akterima, kao i njihove uloge.Više od 200.000 ha divlje kolekcije; više od 1.000 hektara obradivog zemljišta (uglavnom žitarice, povrće i voće); hiljade životinja (naročito krava, ovaca, koza i svinja), kao i hiljade košnica se certifikuju kao organske. Sektor je povezan sa međunarodnim lancima snabdevanja i izvozno je orijentisan. Domaće tržište je i dalje veoma malo. Makedonija je u ranoj fazi organske proizvodnje hrane, prerade, distribucije i marketinga. Organska proizvodnja još uvek nije razvijena u dovoljnoj mjeri po obimu i raznovrsnosti. Očekuje se dalji rast, dobra organizovanost mreža NVO kao i posvećena nacionalna politika koja podržava organski sektor.

Ključne riječi: organska poljoprivreda; Makedonija; sistem upravljanja; tržište.