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MINISTRIA E BUJQËSISË, PYLLTARISË DHE ZHVILLIMIT RURAL
MINISTARSTVO POLJOPRIVREDE, ŠUMARSTVA I RURALNOG RAZVOJA
MINISTRY OF AGRICULTURE, FORESTRY AND RURAL DEVELOPMENT

The National Organic Action Plan of the Republic of Kosova

(NOAP) 2023 - 2026



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RURAL DEVELOPMENT

THE NATIONAL ORGANIC ACTION PLAN

OF THE REPUBLIC OF KOSOVA

2023 - 2026

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In the preparation of the NOAP 2023-2026, several institutions from state and private sector participated and contributed from their field of expertise. The NOAP stakeholder group included MAFRD officers, representatives of farmers, consumers and citizens associations, researchers, NGOs, market actors and business organizations.

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LIST OF ABBREVIATIONS

AAD:	Agency for Agricultural Development
ADC:	Austrian Development Cooperation
ARDP:	Agriculture and Rural Development Plan
CIHEAM	Centre International de Hautes Études Agronomiques
COF:	Commission on Organic Farming
DAPM:	Department of Agricultural Policies and Markets
DEAAS:	Department of Economic Analyses and Agriculture Statistics
DF:	Department of Forestry
DRDP:	Department of Rural Development Policy
EU:	European Union
UNFAO:	Food and Agriculture Organization of the United Nations
FiBL:	Research Institute of Organic Agriculture
FVA:	Food and Veterinary Agency
GDP:	Gross Domestic Product
GIZ:	Deutsche Gesellschaft fuer Internationale Zusammenarbeit
GPS:	Global Positioning System
IADK:	Initiative for Agricultural Development of Kosovo
IFOAM:	International Federation of Organic Agriculture Movements
IPARD:	Instrument for Pre-Accession Assistance in Rural Development
ISMAFRD:	Institutional Support of Ministry of Agriculture, Forestry and Rural Development
KAS:	Kosovo Agency of Statistics
KEAP:	Kosovo Environmental Action Plan
KEPA:	Kosovo Environmental Protection Agency
KFA:	Kosovo Forestry Agency
KIESA:	Kosovo Investment and Enterprise Support Agency
MAFRD:	Ministry of Agriculture, Forestry and Rural Development
MAPS:	Medicinal and Aromatic Plants
MFLT:	Ministry of Financave, Labor dhe Transfers
MESPI:	Ministry of Environment, Spatial Planning and Infrastructure
MEST:	Ministry of Education, Science and Technology
MSD:	Market System Development
MIET:	Ministry of Industry, Entrepreneurship and Trade
NGO/GO:	Non-Governmental Organization/Governmental Organization
NOAP:	National Organic Action Plan
NWFPS:	Non-Wood Forest Products
O4D:	Organics for Development consultancy, Switzerland, Markus Arbenz
OAAK:	Organic Agriculture Association of Kosovo
Organika:	Association for Organic Agriculture in Kosovo
PPSE:	Promoting Private Sector Employment
SAA:	Stabilization and Association Agreement
SAP:	Stabilization and Association Process
SIREd:	Sustainable and Inclusive Rural Economic Development
SWOT:	Strengths, Weaknesses, Opportunities, Threats
TAIEX:	Technical Assistance and Information Exchange
TAK:	Tax Administration of Kosovo
UAA:	Utilized Agricultural Area
UNDP:	United Nations Development Programme
USAID:	United States Agency for International Development

Foreword

It is of high priority for MAFRD to incorporate sectorial visioning of stakeholders into the strategic documents for implementation such as action plans. The National Organic Action Plan of the Republic of Kosovo (NOAP) for the period 2023-2026 enforces our aim to support further organic farming. Confirming the increasing role of the agricultural sector via substantial increase of financial support, vast number regulations and documentations for the Government of Kosova, and of the MAFRD under my lead, any transition towards more sustainable production methods, including organic farming, is of high priority for the Republic of Kosova. Strengthening the agriculture development based on the practices and values of organic farming can afford many benefits, from an economic, environmental, and social aspects.

The Republic of Kosova, MAFRD, stresses the importance of reforms in its agricultural policy to comply with farmers, operators and costumers needs along the European Union (EU) policy reforms and values.

Since the establishment of the Organic Agriculture Association of Kosova (OAAK) in 2002, first pioneer organisation, which initiated the organic movement and now in 2023 where,, Organika,, is operating in organic sector, we have all witnessing the important changes in organic agriculture, thanks to different projects and preparation of national legislation for the organic production and above all the commitment of organic farmers, collectors and operators to organic principles to sustain the nature. Significant impact on increase role and awareness on organic farming and products are investments and willingness of producers to continuous knowledge gathering and exchange and ability to learn and implement the principles and standards of organic production.

Kosova has become a favourable country for foreign investments, parts of which have already been allocated to the production and export of Kosovo organic products, especially Non-Wood Forestry Products (NWFPs), and the cultivation of Medicinal and Aromatic Plants (MAPs) has been developed very well in the past few years.

The NOAP provides clearly identified 4 pillar objectives and 19 actions packages and indicates the stakeholders responsible for its implementation. This sends a clear signal to the donor agencies to get actively involved in the proposed actions aimed at organic agriculture development.

The MAFRD, through its active involvement, recognizes the support received from producers and other stakeholders, who contributed to the development of the National Organic Action Plan 2023-2026 of the Republic of Kosovo, and expresses its gratitude to them.

MAFD express deep appreciation to the project "Sustainable and Inclusive Rural Economic Development (SIREDE)", funded by Austrian Development Agency (ADA), and to all those who have collaborated with us to prepare the NOAP 2023-2026.

Faton Peci
Minister of Agriculture, Forestry and Rural Development



Executive Summary

Kosovo looks back to more than 20 years of organic development with an arising sector that has many opportunities for export and domestic markets to grow. In fact, the certified organic area has significantly grown. While in 2009, there were only 5 hectares with organic medicinal and aromatic plants (MAPs), by 2020 this figure had increased to a total of 1,672 hectares of organic production (including MAPs with 1'039.71 hectares) by 66 organic operators plus 373'488 ha wild collection area. 35 certified companies are operating in the organic MAP sector and 45 collection centers for MAPs cover the whole territory of Kosovo. The collection centers organize the collection, drying and sub processing of wild and medicinal plants and generate an income for 3'200 collectors. Kosovo is among the countries with the biggest areas for organic wild collection worldwide. The majority of the production volume was exported to Germany, Austria and Switzerland.

The first Kosovan organic law (n 02/L – 122) had passed in spring 2007, however until today no operators are certified against this standard. A subsidy system has been launched by MAFRD in 2016 to offer interested farms incentives to start with the conversion process. MAFRD supports farmers through direct payments in organic production with specific values for each cultivated crop (fruit sector, viticulture and cereals).

MAFRD staff together with organic stakeholders in Kosovo developed a first National Organic Action Plan, NOAP for the period of 2018-2021, which contained clearly identified objectives and actions and indicated the actors responsible for its implementation. In 13 areas of activity, it covered the production, processing and market development, the legislation, certification and control, the policy, research, education, training and extension services.

In 2022, the stakeholders clearly expressed the wish for a second NOAP from 2023 - 2026. The process revealed that the organic farming sector grew and developed in recent years, but there are many challenges that need to be faced by farmers and institutions. The analyses reveal the following strengths, weaknesses, opportunities and threats:

Strengths:

- The organic sector in Kosovo is continuously growing
- Organic farmers and processors getting better equipped
- Farmers have gradually strengthened their technical capacities

Weaknesses:

- Still low level of technical capacities among organic operators
- Lack of organic inputs
- Weak extension service for organic farms and less research in organic agriculture
- Small scale farms in Kosovo don't have the possibilities for the effective use of most modern technologies

Opportunities:

- Favorable natural conditions and political willingness to support the organic sector
- Donor programs are supporting organic agriculture
- Capacity building programs could strengthen the technical capacities
- International demand for organic products
- Farmers are open for organic production
- New organic value chains under development

Threats:

- Global economic and climate crisis can weaken organic sector development
- Low consumer awareness about organic production and products
- Insufficient support and leadership of MAFRD
- Lack of labor forces in rural areas
- No / low price margins for organic products
- High costs for organic certification and inputs

Kosovo aims at a fully functional, successful, sustainable, and nationally and internationally well-renowned organic food and farming sector. An increasing number of stakeholders including farmers and businesses produce accessible, environmentally sustainable organic food, drinks, textiles, and other organic products for the local and export markets. Relevant and high-quality services such as sector coordination, match making e.g. in trade fairs and internet platforms, certification, advisory services, research, laboratory services, education and promotion support the value chain actors. Fair and well implemented rules and regulations are in place.

To get closer to this vision, Kosovo has the following overall objectives until end of 2026

“A well-functioning Kosovo organic production on a relevant and increasing area supplying the domestic and export markets with attractive producer prices and satisfying the demand of consumers. The market has suitable framework conditions and offers supporting services to further grow and to develop qualitatively.”

Kosovo has a holistic strategy of developing the organic market looking at all its aspects including the production, processing, trade and consumption as well as regulations and supporting services with a Market System Development (MSD) view. The strategy identifies four pillars of measures with own objectives and which interact closely: A) Production and Processing B) Market development C) Legislation, certification and policies and D) Research, education, training and extension. In total, the National Organic Action Plan has 19 action packages as follows.

Activity area A: Production and Processing in the organic sector

- A1 Subsidies for inputs
- A2 Subsidies for certification and conversion
- A3 Subsidies for land cultivation
- A4 Infrastructure development (subsidies for investments)

Activity area B: Market development

- B5 Public communication and promotion (consumer information)
- B6 Organic statistics and market information for operators
- B7 Value chain facilitation
- B8 Export promotion

Activity area C: Legislation, certification and policies

- C9 Organic law enforcement including CB accreditation for the certification against the national organic law.
- C10a Organic law revision adapting to the EU or
- C10 Organic law revision with an own strategy
- C11 Introduction of Kosovo Organic Logo for the domestic market

- C12 NOAP management, monitoring and enforcement.
- C13 Organic policy development and mainstreaming organic in overall Kosovo food system and education policies

Activity area D: Research, education, training and extension

- D14 Organic applied research
- D15 Adequate management of extension services and proper competence for organic advice for farmers.
- D16 Facilitation and networking of organic institutions in Kosovo and internationally
- D17 Capacity building in the organic sector
- D18 Integrate education about sustainable food, agriculture and organic systems
- D19 To strengthen the cooperation with international agencies.

Part 1 Sector analyses 2022

1.1 The Kosovo organic sector until 2022

Since the end of the war in 1999, Kosovo has experienced a modest economic growth whereas agriculture is considered very important for economic development of Kosovo. Agriculture activities have traditionally been part of the daily life of many people living in the rural areas where more than half of the population lives (MAFRD, 2013). There are 1.1 million hectares of land from which 38.53% is agricultural land, 44.11% forest, and forests, 4.40% urban land and other 12.96%¹. The utilized area of agricultural land is 420.326 ha (including common land), of the total used area of agricultural land. Most of it (51.65%) is meadows and pastures (including common land). Arable land-fields are 44.82%, perennial crops 3.27%, and gardens 0.29%². A small part of the agricultural sector, 0.4% is dedicated to organic agriculture³.

Policy makers in Kosovo recognized early, that organic production methods could be a useful option for the country with many abandoned farms and a low level of technical infrastructure, and often a subsistence kind of agriculture that neither uses fertilizers nor pesticides, just soil and labor. The first steps towards an organic network were taken in 2001 through a project for introducing organic farming to the Balkans (introduction of organic farming and low input sustainable agriculture in the Balkan countries) set up in 1999 by the Dutch foundation Avalon.

Even if there was not a real market for organic produce in this period, some farms have begun to follow the principles of this kind of production. In 2009, the first operator “Agroproduct” was certified to produce small fruit and medical herbs followed by “Hit Flores”.

After that pioneer phase, various international donor organizations supported the development of the organic sector during the last 20 years, mainly by technical assistance to the public and the private sector or with financial contributions to investments to increase the productivity and quality of organic products from Kosovo. Support was financed e.g. by GIZ, USAID, and ADA and implemented by international organizations such as CARITAS Switzerland, SWISSCONTACT or FiBL. In parallel, the national association ORGANIKA and the agricultural competence center IADK took a leading role in the development of relevant structures and in facilitating technical capacity building.

The main drivers of development and engines of growth were the various private sector companies that were founded and started to export mostly non-timber forest products, the medical and aromatic plants. Those companies, private sector, are also the backbone of the organic sector in the future.

Regarding the legal framework, the Organic Agriculture Association Kosovo (OAAK) has had a decisive role in proposing the first relevant Kosovan law (n 02/L – 122), which had passed in spring 2007, based on European Regulations. Later, with the support of the Italian project KOSAGRI and TAIEX specialists, the MAFRD prepared eight Administrative Instructions (AI) in order to implement the Law 04/L 85 on organic farming effectively, in alignment with the EU Legislation. According to AI No.02/2019 on organic production control system, control authority, certification and control bodies and the rules for their implementation, MAFRD represents the Competent Authority and is responsible for the organization of the control system.

1 Strategy for agriculture and rural development 2022-2028, MAFRD 2021

2 Kosovo Agency of Statistics, Results of the Agricultural Holdings Survey (AHS), 2021.

3 FiBL & IFOAM – Organics international. The World of Organic Agriculture. Statistics & Emerging Trends. 2022

A subsidy system has been launched by MAFRD in 2016 to offer interested farms incentives to start with the conversion process. MAFRD supports farmers through direct payments in organic production with specific values for each cultivated crop (fruit sector, viticulture and cereals). The Agency for Agricultural Development (AAD) is responsible for the implementation of the direct payment scheme.

In addition, the MAFRD staff together with the relevant organic stakeholders in Kosovo developed a first National Organic Action Plan (NOAP 2018-2021), which contained clearly identified objectives and actions and indicated the actors responsible for its implementation in 13 areas of activity (which cover the production, processing and market development, the legislation, certification and control, the policy, research, education, training and extension services). However, NOAP 2018-2021, was just passively communicated and in consequence couldn't be used effectively as guiding paper of the organic sector development.

Based on the 2020 Legislative Program approved by the Government of the Republic of Kosovo, an Ex-Post evaluation of the regulatory impact of the Law No.04 / L-085 on Organic Farming has been conducted, which acknowledged that the organic farming sector has started to grow and develop in recent years, but there are many challenges that need to be faced by farmers and institutions.

Over the last 20 years, the certified organic area has significantly grown. While in 2009, there were only 5 hectares with organic medicinal and aromatic plants (MAPs), by 2020 this figure had increased to a total of 1,672 hectares of organic production (including MAPs with 1'039.71 hectares). The majority of the production volume was exported to Germany, Austria and Switzerland.

Table 1 indicates some important milestones and summarizes the development of the organic sector in the last 20 years.

Table 1: Major milestones of the organic sector development in Kosovo

Year	Milestone in the development of the organic sector in Kosovo
2002	<ul style="list-style-type: none"> The first Organic Agriculture Association of Kosovo (OAAK) was established. The first activities in the field of organic agriculture in Kosovo started. Professors from the University of Pristina - Faculty of Agriculture and Veterinary, in the framework of Avalon project, supported a small number of farmers from the Dukagjini region, who produced in accordance with organic agriculture principles with the support of the association OAAK. Start of cross-border cooperation, with continuous support from various funding sources in the field of education and training, study visits (Albania, Croatia, Serbia, the Netherlands, Switzerland, Germany and other countries) and publishing of brochures and a bulletin about organic agriculture.
2004	<ul style="list-style-type: none"> Initial expertise for drafting the legal basis for organic agriculture was provided in 2004 by the AVALON project from the Netherlands, and the preparation of organic standards started, with support from OAAK.
2008	<ul style="list-style-type: none"> The first report on the organic agriculture development program was prepared by the project "Institutional Support of Ministry of Agriculture and Rural Development" (ISMAFRD). MAFRD issued the first Law on Organic Farming.
2009	<ul style="list-style-type: none"> The first organic farmers were certified for NWFPs and honey.
2011/12	<ul style="list-style-type: none"> With the support of KOSAGRI project the new Law on organic farming was issued and approved by the Parliament.

2013	<ul style="list-style-type: none"> The association “Organika” was established, representing the main sector operators for NWFPs and MAPs, with objectives to improve cooperation between the organic sector actors, to promote organic products from Kosovo and to advocate for the organic sector development.
2016/2017	<ul style="list-style-type: none"> The administrative instructions for the implementation of the Law on organic farming have been elaborated during 2014-2017 by TAIEX and KOSAGRI specialists and the completed Package was presented in 2017. First state subsidy program launched to support organic agriculture.
2018	<ul style="list-style-type: none"> The first National Organic Action Plan was launched, elaborated by a team of MAFRD (Kosovo) and CIHEAM – Bari (Italy).
2019	<ul style="list-style-type: none"> Organika becomes member of IFOAM Organics International
2022	<ul style="list-style-type: none"> The first Capacity Development Concepts have been developed by stakeholder groups and FiBL for the organic MAP, Berries and Vegetables Value Chains in the frame of the SIREN project. The first NOAP has been evaluated by sector stakeholders facilitated by Organics4Development from Switzerland. It is the base for the NOAP 2023-2026.

Source: NOAP Kosovo 2018-21, SIREN program and interviews

1.2 Sector status 2022

1.2.1 Overview

Despite of the recent dynamic and a history of 20 years certified organic agriculture and wild collection in Kosovo, organic agriculture is still on a niche level with 0.4% of the total cultivated agricultural area (see table 2).

Table 2: Development of the organic certified area between 2019 – 2020⁴

Country	Year	Organic area (farmland) [ha]	Organic area share of total farmland [%]
Kosovo	2019	1'036.00	0.25
	2020	1'604.00	0.38

However, recently initialized by the technical and financial support from the SIREN program as well as triggered by the international market demand, there is a significant tendency to cultivate more organic MAPs and berries and to start with first demo-trials in organic vegetable production.

The EU introduces now the new Organic Regulations, with a start of implementation on January 1, 2022 with a transition period until end of 2024. Stakeholders and organic farmers in Kosovo are still busy understanding the new requirements and to adapt the organic supply chains systems in terms of required structures and documentary procedures. Stakeholders and master trainers in Kosovo have been trained in this regard by FiBL in the course of the SIREN project.

⁴ Source: FiBL & IFOAM – Organics international. The World of Organic Agriculture. Statistics & Emerging Trends, 2022

Besides, for the three organic value chains, MAP, Berries and Vegetables, Capacity Development concepts have been elaborated as a guiding element to support the organic sector on an individual and institutional level.

The efforts from the private sector to further develop the organic sector in Kosovo are framed by the clear political will to further support the organic sector development by targeted actions.

After the old NOAP expired end of 2021, in 2022 the process started to draft a new NOAP 2023 – 2026, which take up the needs, aims and actions to be undertaken for the promotion of long-term and accelerated development of organic agriculture.

The new NOAP foresees a stronger awareness-raising of organic agriculture among farmers, the general public, policy makers and donors thus creating additional interest towards this opportunity to sustainable development.

1.2.2 Production and processing

Production

The organic production in Kosovo is developing stable. Non-Wood Forest Products (NWFP) dominated the export of organic products from Kosovo for many years, however, nowadays organic products from agricultural production are increasingly exported.

In 2020, 1'604 ha have been cultivated according to organic standards by 66 organic operators plus 373'488 ha wild collection area were certified.

The production and collection of MAPs has the biggest economic relevance in the organic sector of Kosovo. Altogether, 35 certified companies are operating in the organic MAP sector and 45 collection centers for MAPs cover the whole territory of Kosovo. The collection centers organize the collection, drying and sub processing of wild and medicinal plants and generate an income for 3'200 collectors.⁵

Apart from the collection of NWFP and cultivation of MAPs, the most relevant product categories are oilseeds, vegetables and cereals (see table 3).

Table 3: Usage of organic area in Kosovo by product categories in 2020⁶

Product category	Area (ha)
Oil seeds	324
Vegetables	147
Cereals	119
Walnut Trees	11

Source: FiBL & IFOAM – Organics international (2022)

5 Avdiu, V. (2022): Organic agriculture, legal harmonization, transposition, certification and access to organic goods market. In Proceedings of the first Meeting of the Regional Expert Advisory Working Group REAWG on Organic Agriculture within the "Agriculture Policy Dialog Germany Western Balkan" (09.-11.03.2022), Pristina

6 FiBL & IFOAM – Organics international. The World of Organic Agriculture. Statistics & Emerging Trends, 2022

Nowadays also berry production and organic pepper production are activities, which have been promoted and piloted recently and will further develop according to the domestic, regional and international market conditions.

According to the not published Inception Report from SIREG in 2020, the entire organic production in Kosovo is still lacking technical capacities and farmers have difficulties to get access to effective organic inputs, which have been approved by the certification bodies. Both described challenges led in consequence in the past to rather low yields and product qualities.

Processing

In the year 2020, altogether 21 organic processors had a valid organic certificate. The most of the processing activities are related to drying and processing MAPs or freezing berries to make them ready for export requirements.

1.2.3 Domestic markets and consumption

The awareness of the principles and benefits of organic production among farmers and consumers in Kosovo is still low even though the idea of organic agriculture enjoys a good reputation apart from being felt expensive. People don't know much about the regulation and mandatory certification and the interest to buy organic food is still low. Therefore, market actors such as retailers have not yet pushed organic food items to the market.

Besides, the consumers' purchasing power on the domestic market is still low and food safety is the main concern for the primary sector. Nevertheless, organically labeled products of local origin and imported ones can be occasionally observed for some product groups (e.g. eggs, herbs, juices, honey).

1.2.4 Export markets

Over the last years, the exporters from Kosovo have established vivid business partnerships to traders mainly in Europe. Most of the export activities are related to semi processed products with a value of 12 million EUR. Almost the entire production of certified organic products in Kosovo (95%) is exported. The main export destinations are Germany, Austria and Switzerland.⁷

The export market and its prospects are the main drivers in the organic agriculture in Kosovo. While in the beginning, only organic MAPs have been exported from wild collection, the demand increased over the last years and let the collection centers start to contract farmers to cultivate organic MAPs.⁸

Between 2018 and 2021, the total exported quantity to EU countries fluctuated between 361 and 522 tons. MAPs are by far the largest exported product group, followed by fruits (berries), spices, seeds and vegetables.

There is a clear increase in the export of MAPs, while the export volume of fruits and vegetables dropped within the period of 2018 -2021. (see table 4).

7 Avdiu, V. (2022): Organic agriculture, legal harmonization, transposition, certification and access to organic goods market. In Proceedings of the first Meeting of the Regional Expert Advisory Working Group REAWG on Organic Agriculture within the "Agriculture Policy Dialog Germany Western Balkan" (09.-11.03.2022), Pristina

8 Organika (2019): Assessment of Non-Wood Forest Product and Medicinal and Aromatic Plant Sector.

Table 4: Development of organic exports from Kosovo to the EU between 2018 and 2021 by product categories⁹

Exported Volume (t) Product category	Year			
	2018	2019	2020	2021
Bulbs, roots and live plants (MAPs)	200	266	207	328
Fruits	259	132	56	80
Nuts and spices	62	11	7	74
Miscellaneous seeds	1	26	19	24
Vegetables, fresh, chilled and dried	14	32	61	12
Oilseeds, other than soyabeans	8	15	11	3
Feed and feed ingredients	-	-	1	-
Tea	-	6	-	-
Total	544	489	361	522

The main export destinations for organic products from Kosovo in EU countries are Germany Austria, and nowadays also Lithuania, Slovenia and Croatia (see table 5).

Table 5: Development of organic exports from Kosovo to the EU between 2018 and 2021 by import countries¹⁰

Exported Volume (tons) Import country	Year			
	2018	2019	2020	2021
Germany	139	268	258	335
Austria	86	79	72	61
Latvia	-	-	-	40
Slovenia	-	-	-	40
Croatia	-	-	-	37
Italy	-	-	3	9
Belgium	99	-	-	-
Czech Republic	159	140	-	-
France	-	3	8	-
Hungary	60	-	-	-
Netherlands	1	-	20	-
Total	544	489	361	522

Switzerland imported 2020 organic certified MAPs from Kosovo with a volume of 23 tons and no other product categories.

Due to the lack of technical capacities (as mentioned under chapter 1.2.2) it is not surprising, that the image of organic exporters from Kosovo is behind the ones from other export countries in Europe. This is a result of the market study about the potential of Organic Berries and MAP from Kosovo to Germany, Switzerland and Austria in 2020. The interviews with importers in the 2020 suggested, that there is a clear potential for a higher export trade volume of Organic Berries and MAPs. However, in the importer's eyes, Kosovo has the image of a sourcing country with favorable

9 EC (2022): Agricultural Markets Briefs - EU imports of organic agri-food products (Analysis of data from TRACES)

10 EC (2022): Agricultural Markets Briefs - EU imports of organic agri-food products (Analysis of data from TRACES)

product prices while other criteria such as quality, reliability, etc. are assessed lower compared to other sourcing countries.¹¹

1.2.5 Supporting measures of the government

Since 2016, hectare-related subsidies for cultivation of MAPs and other crops such as cereals, vegetables and fruits have been introduced as a premium above the general subsidies which also conventional farmers receive.

Currently, the subsidies for all organic certified crops exceed the conventional cultivated crops only by 50 EUR/ha, what offers not a relevant economic incentive to new farms to convert to organic agriculture.¹² Besides, the amount of direct payments decreased significantly over the last years (see table 6). On contrast to farmers, pickers of certified NWFP don't get any financial support.

Table 6: Development of direct payments for organic agriculture in Kosovo between 2016-22¹³

Years	Direct Payments per ha (EUR)
2016	200,-
2017	300,-
2018	500,-
2019	500,-
2020-2022	50,-

Support through the NOAP 2018-21

The NOAP 2017-21 entails various measures to promote production, marketing development, research, education, training, extension, legislation, certification etc. which were implemented to a certain extent only (estimated to 80% by MAFRD). The introduction of the subsidy system was led successfully by the government. Other measures, e.g. building up capacities for farmers, trainers and consultants, were mostly implemented by donor programs.

1.2.6 Rules, regulations and conformity assessment

The Law No. 04/L 085 on Organic Farming was constructed pursuant to the Council Regulation (EC) No. 834/2007 on organic production and labelling of organic products, and the Commission Regulation (EC) No. 889/2008 laying down detailed rules for its implementation.

With the support of the Italian project KOSAGRI and TAIEX specialists, the MAFRD prepared eight Administrative Instructions in order to implement the Law 04/L 85 on organic farming effectively and the Tables of Concordance constituted the guidelines for the AI, which explain the procedures for the approximation and alignment with the EU Legislation.

11 Richter, T, I. Kampermann, B. Pulai (2020): Export potential of Organic Berries and MAPs from Kosovo to Germany, Switzerland and Austria. Top Line Report.)

12 Administrative Instruction (MAFRD) No. 07 /2021 on direct payments in agriculture for 2021.

13 Source: MAFRD, Annual administrative Instructions on Direct Payments (between 2016 and 2022) in Agriculture of the various years.

Administrative Instructions:

- 1. AI No. 01/2019 on duties, responsibilities and composition of the Commission on organic farming;
- 2. AI No. 02/2019 on organic production control system, Control Authority, control bodies and the rules for their implementation;
- 3. AI No. 03/2019 laying down the rules for organic plant production;
- 4. AI No. 04/2019 laying down the rules for organic livestock production and feed;
- 5. AI No. 05/2019 laying down the rules on organic aquaculture production;
- 6. AI No. 06/2019 on criteria, standards and conditions for imports of organic products in Kosovo;
- 7. AI No. 07/2019 on designation of the organic production logo and specific requirements for labelling;
- 8. AI No. 08/2019 laying down the rules for production and methods for organic processed products.

1.3 Overview of Strength, Weaknesses, Opportunities and Threats

The SWOT analysis of the organic sector in Kosovo has been derived by the answers of the online stakeholder survey and focus group discussions in 2022 and presented at the Policy Workshop in Pristina on October 11, 2022.

Concluding the results of the listed strengths and weaknesses as well as the opportunities and threats, the results visualized in figure 6 suggest that there is still a lot of work ahead for the sector. However, there are also clearly seen strengths of the sector and opportunities which have to be used and exploited by actors of the sector.

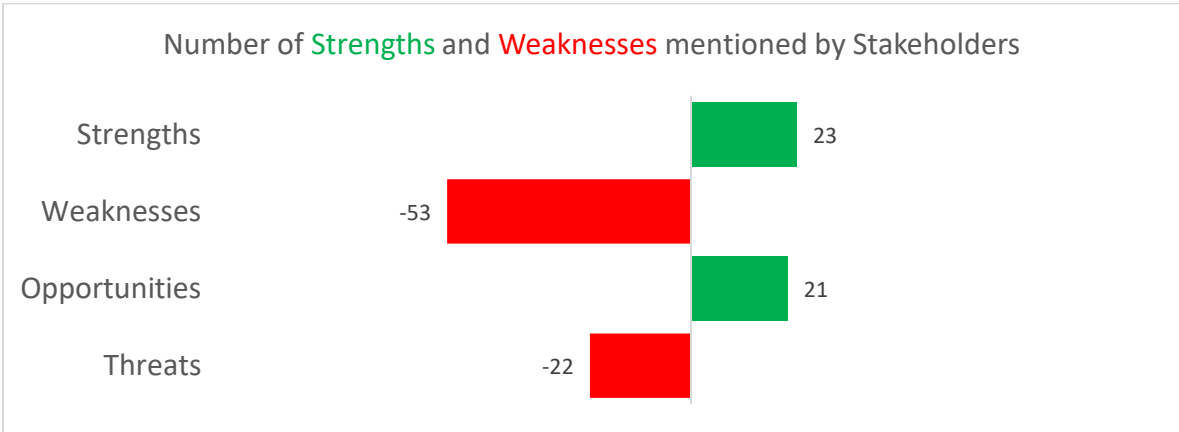


Figure 6: Comparison of strengths, weaknesses, opportunities and threats, mentioned by organic stakeholders in Kosovo; Online Organic Stakeholder Survey, 2022

Strengths

a) The organic sector in Kosovo is continuously growing

Organic agriculture in Kosovo has grown steadily in recent years. This applies both to the size of the area and the number of producers and processors. This also applies to the service provider sector. The institutions organized as service provider, such as the association Organika and the agricultural competence center IADK, have stabilized their structures and have been able to gain more expertise and pass it on to farmers.

Besides, Business Support Organizations, such as PePeKo (Vegetables) and Mjedrat ne Kosove (Berries) are active in piloting organic plots and farms.

b) Organic farmers and processors getting better equipped

During the past years, several donor programs (e.g. GIZ, PASURI, SIREM, PPSE, UNEP, USAID) support farmers and collection centers in the purchase of drying or sorting equipment (MAP), in the construction of cooling/freezing facilities (berries) or in the purchase of agricultural equipment for soil cultivation, sowing or weed control.

c) Farmers have gradually strengthened their technical capacities

During the past years, technical trainings have been provided by various donor programs to stakeholders, farmers and trainers of the three main important value chains, MAPs, Berries and Vegetables. Gradually, the shared expertise is trickling down and influences the cultivation praxis of modern organic field practices. Nevertheless, there is still a lot of work ahead of the sector to strengthen the capacities of organic operators in a sustainable and stable manner (defined in Capacity Development Concepts for the Berry, MAP and Vegetable Sector).

Weaknesses

a) Still low level of technical capacities among organic operators

The organic sector in the last 20 years has been dominated by wild collection activities. In contrast, the organic crop and horticulture production is still in a pioneer phase. This is the main reason, that a more comprehensive expertise about organic cultivation practices is still lacking. The biggest technical challenges are to plan the crop rotations, an effective weed control, pest and disease management as well as effective measures in post-harvest management.

b) Lack of organic inputs

Until now, in organic crop and horticulture production, organic farmers in Kosovo trust on the application of effective organic inputs. They differ in that point to traditional organic farming practices as common in Western European countries, where organic farmers try to rely on preventive measures of plant protection and use compost and manure rather than organic fertilizers. On top, many farmers are not aware, what those organic inputs entail.

Besides, high quality seeds and planting materials are not available in a sufficient amount.

c) Weak extension service for organic farms and less research in organic agriculture

Although many qualification measures for advisors and trainers have taken place in recent years, there is still a lack of an effective extension service that can provide technical support to organic farms (particularly in the first years of organic cultivation). Especially farmers in the conversion period would need coaching programs, where experienced advisors could accompany the learning process of new organic farmers.

The networks between the research institutions (e.g. universities) and private sector/civil society (business, NGOs, Association) are weak. At the universities, organic agriculture is hardly subject of research programs and of learning events. Research results are not well published and not easy to find.

d) Small scale farms in Kosovo don't have the possibilities for the effective use of most modern technologies

The typical organic farms in Kosovo are micro or small-scale farms. These farms are lacking financial capital for any investments. But also, the farm size is too small to pay off any investments. The consequent work in cooperatives to share equipment with other farm members is not a common practice among farmers in Kosovo. This fact can also be seen as one of the reasons for the low yields and low product qualities.

Opportunities

a) Favorable natural conditions and political willingness to support the organic sector

Kosovo has conducive natural and political conditions for organic farming. Weather and soil conditions are suitable for organic crop and horticulture production. The government is willed to support organic farmers by slight subsidies and to follow the course of activities, written down in its National Organic Action Plan.

b) Donor programs are supporting organic agriculture

Kosovo is one of the countries in Europe with the highest amount of donor support per capita. A big amount of the donor funds are dedicated to agricultural programs, which mostly also promote organic agriculture as important source to create jobs in rural areas and contribute to poverty alleviations.

c) Capacity building programs could strengthen the technical capacities

Most of the agricultural donor programs entail trainings for trainers or farmers. This is important to strengthen the capacities of the organic sector. However, so far, the single measures were offered just punctual and were not systematically and chronological linked to each other as a wholistic Capacity Development program is lacking so far.

d) International demand for organic products

The international demand has been the main driver of the organic sector development in Kosovo over the last 10 years. Although in 2022 the demand of organic products in many of the target countries is stagnating due to the economic crisis, there is a clear long-term prognosis of a further growth of organic markets in the target countries. This will attract more farmers to convert to organic agriculture or to enhance their organic production or trade activities.

e) Farmers are open for organic production

Especially among some young farmers, there is a great interest to learn how to manage a farm according to organic standards and principles despite the fact that the overall interest in farming is in decline. These farmers are open minded and eager to be part of training programs or organic stakeholder platforms.

f) New organic value chains under development

Although the cultivation of MAPs and the wild collection NWFP are the traditional activities of the organic sector in Kosovo, during the last years also stakeholders from the berry and the vegetable

sectors could be convinced to pilot organic demo trials or to start the organic production. Also, here impulse from the international markets are the main drivers.

Besides, there is potential for more organic arable crops to export on international markets. This would allow farmers, who cultivate MAPs to plan proper crop rotations, including legumes for the fixation of nitrogen in soils.

Threats

a) Global economic and climate crisis can weaken organic sector development

Climate change and the current inflation tendencies have the potential to do significant economic harm of civil societies on a global level. Also, the main target markets for the exports of organic products are affected from this crisis. In the consequence, the purchase power of consumers may decrease and the willingness to buy organic products with price premiums might be limited as a consequence. This hampers not only the development of the prospects in export markets, it also limits the possibilities to establish a broader domestic market for organic goods.

The expected increase of drought and heavy rain periods make the production of any agricultural products more challenging. In tendency this could lead farmers believing the usage of conventional inputs is important to have a more secured and resilient production.

b) Low consumer awareness about organic production and products

In the past, little has been invested in Kosovo to promote the concept of organic farming to consumers. Consumers are therefore often unaware of what "organic" means in terms of food labelling respectively what organic agriculture means exactly. Without that knowledge consumers will not recognize a higher value for such products and the willingness to accept higher prices for organic products will be limited to few consumer groups.

c) Insufficient support and leadership of MAFRD

Stakeholders in Kosovo fear, that MAFRD is not supporting the organic agriculture sufficiently nor that it really takes the leadership in implementing the planned activities of the National Organic Action Plan 2018-21.

d) Lack of labor forces in rural areas

Stakeholders describe for all organic value chains (MAPs, Berries, Vegetables) that labor forces are increasingly leaving the villages and the agricultural sector. All three production sectors use labor intensive production methods. Besides, small farms as in Kosovo cannot use technical equipment to replace missing labor forces in the same way, as bigger farms can use such technologies. Especially young smart persons tend to migrate into the cities.

e) No / low price margins for organic products

Currently, conventional farms receive relative high prices for their products and therefore the additional margin for organic products is too low (e.g. in berry or vegetable production) to cover additional certification or production costs of organic agriculture. This could hinder the readiness of further farms to convert their production to organic agriculture.

f) High costs for organic certification and inputs

The certification costs for micro and small farms are extraordinarily high compared to bigger farms as the inspection and certification procedure is comparable regardless of the size of a farm. Also, the available inputs are quite expensive according to the stakeholder opinions.

What does it mean for policy and new NOAP?

Organic agriculture in Kosovo continues to struggle with major challenges. These include the small-scale structure of agriculture, the lack of simple and qualified workers on the farms, the lack of knowledge and experience in organic farming, and the relatively high costs for the use of inputs or certification. In addition, there is a lack of sufficient research and advisory services from which organic farmers in Kosovo could benefit directly.

The landscape of organic stakeholders is scattered, financially vulnerable and strongly depending on financial support of donor programs.

It is expected that the donors will invest in the further development of the organic agriculture also in future as it provides the potential to create a higher income and would contribute to a rural development, where the agriculture is more resilient financially and ecologically.

However, the policy sector as well as the private sector would have to better exchange and collaborate to make support programs more effective. This also implicates a stronger ownership of the MAFRD in the process of implementing a new NOAP at all.

As a resort, MAFRD or Organika may invite stakeholders to regular working group meetings and coordinate the implementation of the planned measures of the new NOAP.

1.4 Sector needs

The workshops, surveys and focus group discussions that were preparing the NOAP identified the needs in the area of capacity development on farm, processor, trader level and service providers level.

The detail results of the workshops are presented in the annex in details in chapter 6.3.1 for the MAP sector, in 6.3.2 for the Berry sector and in 6.3.3 for the Vegetable sector. They are reflecting and mirroring the results of the SWOT in chapter 1.3.

On **farmer level**, the organic sector in Kosovo needs

- further financial support by donors and the government;
- systematic training, peer learning and coaching programs;
- awareness creation for organic production;
- the provision of sound market and production data; and
- insurances which would cover the losses in the transition periods to lower the risks for the farmers

On **processor and trader level**, the organic sector in Kosovo needs

- further financial support by donors;
- Training of farmers to how meet the required quality standards for organic processing; and
- Lobby and advocacy to consumers in Kosovo about benefits of organic products.

On **service provider level**, the organic sector in Kosovo needs

- Personal training of trainers and consultants;
- Exchange visit to organic producers in neighboring countries (exchange of experiences, practices, building up an international peer learning network);
- Familiarity with organic standards;

- Familiarity with organic production methods (fertilization, pest and disease management, weed management, crop rotation);
- Training materials for the organic production in farm and processing level; and
- Training about the availability and best application of organic inputs.

Part 2 Scope of the NOAP and its development

2.1 The relevance of National Organic Action Plans internationally

Organic farming has evolved about 100 years ago in various parts of the world and has seen a big and ongoing growth in terms of organic production, processing, trade and consumption. IFOAM Organics International, the global umbrella of the organic movement differentiates between Organic 1.0 (the time of the organic pioneers), Organic 2.0 (the market development and the prescription of the organic practices in standards and regulations) and Organic 3.0¹⁴. The latter is the vision for the use of organic agriculture for sustainable development including the economic, social and environmental dimension and contributing to the Sustainable Development Goals (SDG). The organic agriculture approach is based on the principles of Health, Ecology, Fairness and Care. It sees itself as a production system based on tradition, innovation and science that promotes a good quality of life for all involved. In the majority of countries, organic regulations or national standards define details of production, processing and labeling against which operators can certify their production processes.

Since the mid 1990s, more and more countries developed *National Organic Action Plans* as an instrument to coordinate and boost organic sector development, to sharpen the stakeholder strategies and to guide policy setting. For instance, the EU commission passed the European Action Plan for Organic Food and Farming in 2004, 2014 and 2020 and also most EU countries have such plans. While many national action plans focus on governmental policies, the instrument is also used to highlight and plan civil society or private sector contributions. Those plans often identify targets e.g. in terms of the share of organic in the agriculture land. But they also build a strategic framework, they inform policy making and they identify needed investments and actions by the government and oftentimes also by other stakeholders.

Organic farming is innovative as such and requires taking a role of being a pioneer in the agriculture and food system. It is however still far from mainstream and requires attention of the governments to optimally use its private and public benefits as for instance expressed in the UN Sustainable Development Goals (SDG).

For organic being trustful, it requires value-oriented change of conventional practices including in the production, in the exchange relations, in support services, and in policy setting. Organic systems are on the one hand more resilient and more sustainable, and on the other hand they provide societal and environmental benefits. Transition to organic has however its risks and is knowledge intensive.

FiBL, the research institute for organic agriculture has extensively researched good practices of national organic action plan setting in the framework of an EU project and has issued in 2008 and updated in 2018 a manual for national action plan setting.¹⁵ This manual providing good practice in Organic Action Plan development has supported this Kosovo NOAP.

The Republic of Kosovo has passed its first National Organic Action Plan for the period of 2018 to 2021 after a process of development of two years. The plan was developed under KOSAGRI project

¹⁴ IFOAM Organics International, 2018, Organic 3.0: <https://www.ifoam.bio/about-us/our-history-organic-30>

¹⁵ FiBL, 2018, Organic Action Plans. Development, Implementation, and Evaluation, <https://www.fibl.org/en/shop-en/1507-organic-action-plans>

from the Italian Cooperation with the support of CIHEAM Bari in cooperation with the faculty of agriculture and veterinary of the university of Pristina. This first NOAP is now expired.

2.2 Functions of National Organic Action Plans

¹⁶Organic Action Plans have been used to a varied level of success. Where used effectively, they are an essential tool to coordinate within and between government, private sector and civil society to steer organic development. Organic Action Plans serve as a strategic instrument for governments and the sector as a whole to achieve policy goals. This is particularly important where multiple policy goals such as organic sector growth and development, economic, market and rural development and environment, public health and societal benefits need to be considered. Action plans can help create synergies and avoid contradictory policies whilst also ensuring that different measures are complementary. Furthermore, action plans allow specific bottlenecks to be better addressed and they enable broad stakeholder involvement in policy formulation. They depend on effective and inclusive forums to develop a strategic vision.

Appreciating the importance of public policy setting, the organic food and farming concept was however not developed by policy makers and technical experts responding to a specific policy need. Unlike many agri-environmental and rural development policies it has evolved as a social movement for agricultural change and is market-driven. The increasing demand for organic food highlights its potential as a viable business opportunity for agri-food stakeholders.

For policy makers, the challenge is to support a multi-functional organic food and farming systems approach, which can satisfy the varied goals and priorities of a diverse range of interest groups, and to do this in a 'public-private' partnership with Small and Medium Enterprises (SME) and civil society organisations. The overall objective is to balance supply-push and demand-pull initiatives to achieve sustainable development of organic agriculture.

Organic action plans have typically included targets for the proportion of agricultural land to be managed organically within a set time period, and in some cases for the proportion of the food market to be organic. In addition to this, action plans focus upon a combination of the following areas:

- Direct support for environmental and land management;
- Producer advice, training and education;
- Public procurement initiatives;
- Consumer education and promotion;
- Market development and infrastructure support;
- Research and innovation for organic farming;
- Support related to inspection and certification;
- Evaluations of the current situation and effectiveness of previous action plans, and procedures for monitoring impacts.

The Kosovo NOAP offers an insight into the history and status of Organic Agriculture in Kosovo. It identifies the needs, aims and actions to be undertaken for the promotion of long-term and

¹⁶ FiBL et. al., 2018, Organic Action Plans, Development, Implementation and Evaluation.
https://www.fibl.org/fileadmin/documents/shop/1507-organic-action-plans_1.pdf

accelerated development of organic agriculture. NOAP also contributes to raising awareness of organic agriculture among farmers, the general public, policy makers and donors thus creating additional interest towards this opportunity to sustainable development. It also contributes to the establishment of organic agriculture as an integral part of the national agricultural policy and rural development programs.

2.3 Lessons learned from Organic Action Planning worldwide

The FIBL Manual for Organic Action Planning¹⁷ analyzed the experiences of the many action planning processes and makes a few conclusions that were applied in the preparation of this plan and need to be considered in implementation, monitoring and evaluation. Relevant international lessons include:

- Organic Action Planning needs to start with sector analyses and evaluation of earlier plans.
- Government plans need government's leadership. At the same time, stakeholder involvement in all stages is a precondition of sector ownership and implementation support to reach planned targets.
- The content of the plan needs relevance in relation to the stakeholder needs and commitment of the sector. Objectives and measures need to be specific, measurable and achievable. It also needs coherence to other policy instruments.
- Sufficient resources need to be allocated for the implementation of actions and for the management and monitoring of the plan.
- Success starts with planning but requires implementation and enforcement. Political will to follow the investment plans including of government and private sector is precondition that smart plans can succeed.
- A balanced approach to cooperation and competition on all levels is important. The domestic and international opportunities materialize if the market frameworks and structures are conducive to production and trade.

2.4 Lessons learnt from the National Action Plan 2018 - 2021

The broad evaluation of the NOAP 2018 -2021 via survey and various workshops with overall about 120 participants, out of it about 60% farmers, 20% government, 10% private sector and 5% civil society (however only 1/3 were women and majority above 40 years old), revealed the main lessons, which are:

- Very high sector appreciation of the existence of a NOAP and the opportunity to participate in evaluation and development. Relevance was rated very high; however, promotion has been insufficient and many were unaware of the NOAP so far.
- The good quality of the NOAP presentation and its content creates trust and confidence for sector development. 60% of Stakeholders are willing to use the instrument for strategic purposes and 23% for information. Only 17% see no purpose in the NOAP.
- The purpose and function of the NOAP shall not be a donor menu to pick from, but a sector plan with commitments of the stakeholders to work into the same direction. The identified actions are not a wish, but part of institutional planning.

¹⁷ FiBL et. al., 2018, Organic Action Plans, Development, Implementation and Evaluation.

- Stakeholders appreciate a holistic approach and want to see measures with more or less equal priorities in all areas. Investments into direct payments to farmers and value chain facilitation are rated the important measures. Organic law enforcement is also equally important.
- Stakeholders underline that a good plan needs good implementation. They want higher investments in management, monitoring, transparency and accountability to stress that implementation is assured.
- It is important that all the institutions (e.g. government competent authority, certification, extension, input supplier, processing/trading, sector coordination etc.) function well, effective and efficient.
- So far, a lot of stress has been given to the export opportunity and export markets. While this should continue and opportunities well-explored, the domestic opportunities must not be neglected and be subject to new priorities. Diversification of production, availability on retail level and enhancing consumer demand are key for the national market development. A national logo would support that objective.
- Good performance and communication are key elements to convince the costumers in Kosovo and importers abroad. Trust and a good reputation, which are a precondition for market demand, need substantial investments.

2.5 Purpose, scope and limits of the Kosovo NOAP

NOAP is an official plan of the Government of Kosovo, hosted by the Ministry of Agriculture, Forestry and Rural Development (MAFRD). It is not a law nor an administrative instruction, but a tool to coordinate the sector and to assure coherent and synergetic actions in the country.

NOAP's purpose is to provide information for policy makers and the public as well as to guide stakeholders in their activities. It highlights the opportunities that Organic Agriculture can provide in terms of income generation, resilience building, health and sustainability of agriculture and the food system. It underpins the collaborative nature between public and private development efforts. It invites national and international agencies to support the development for the well-being of the Kosovar people and finally to invest into a worldwide well-growing sector. It very concretely guides research, academia, extension, strategy developers, statistics and others.

NOAP is a contribution to the Green Report and to the Strategy for Agriculture and Rural Development 2022-2028 of the Government of the Republic of Kosovo, where the need for government measures to further organic agriculture is stressed various times and where this action plan is anchored.

The scope of the plan includes all organic production, processing, trade and consumption based on agriculture land, on livestock or on wild collection of Non-Wood Forestry Products (NWFP). While most production is for food, organic agriculture also includes agriculture production of body care products, textiles, construction materials, fuels etc. The scope also comprises allowed inputs for production, and it includes living plants and livestock. The plan embraces all persons concerned in the value chain, in the sector services and in consumption. It addresses persons presently assigned in Organic Agriculture formally and informally, those that potentially participate and those that benefit from the sector.

While not being a legal enforcement document, the Kosovo NOAP is closely linked to Law No. 04/L-085 on Organic Farming, which is drafted based on EU Regulations (EC) No. 834/2007 and No. 889/2008.

Based on the Administrative Instruction (MAFRD) No. 01/2019 on Duties, Responsibilities, and Composition of the Commission on Organic Farming, with the Decision of the Secretary General of MAFRD, the Commission on Organic Farming (COF) is established, consisting of nine (9) members: five (5) members from MAFRD and one (1) member from the Food and Veterinary Agency, one (1) member from the Faculty of Agriculture and Veterinary, one (1) member from the Ministry of Environment and Spatial Planning (MESP) and one (1) member from the Organic Agriculture Association of Kosovo (OAAK)¹⁸.

2.6 Methodology of the NOAP 2023 -2026 development

The first NOAP expired end of 2021 and stakeholders from the government, the academia, the private sector and the civil society expressed the need for a new NOAP leading the future development. Caritas Switzerland, in the frame of the ADC supported SIREN program took the initiative in collaboration with MAFRD to support the facilitation of the process to evaluate the first NOAP and to develop a new NOAP 2023 – 2026.

The Kosovo NOAP 2023 -2026, is based on the NOAP 2018 - 2021. At the same time there are substantial innovation and adjustments in the plan expressing the further maturing of the still quite infant but well-growing sector. The new NOAP reflects the lessons learned from the organic policy successes and challenges in the past, the intensified participation of the growing sector stakeholders and the new policy priorities of the presently elected government.

The process of the NOAP development was conceptualized into a) the evaluation of the expired NOAP, b) the development of a new draft NOAP balancing the learning of past experience and creating convening power and c) quality assurance through reality checks for future targets and plans and through ownership building among stakeholders.

The evaluation, the draft development and the quality assurance/ownership building included the following methodology:

- a) an online survey with closed quantifiable questions and open questions for individual feedback;
- b) focus group discussions (e.g. pickers, farmers, inspectors, researchers, NGOs etc.);
- c) “VIP” interviews allowing people from both gender and from various roles and interests to express their opinions in order to triangulate the views;
- d) Evaluation results and policy development workshops at the MAFRD level;
- e) Public consultation of the NOAP draft with written statements and broad stakeholder workshop for feedback, awareness, NOAP promotion and ownership.

Figure 7 visualizes the process and its steps.

¹⁸ There are intentions to hand over this representation to Organika, since OAAK might not exist anymore in the future.

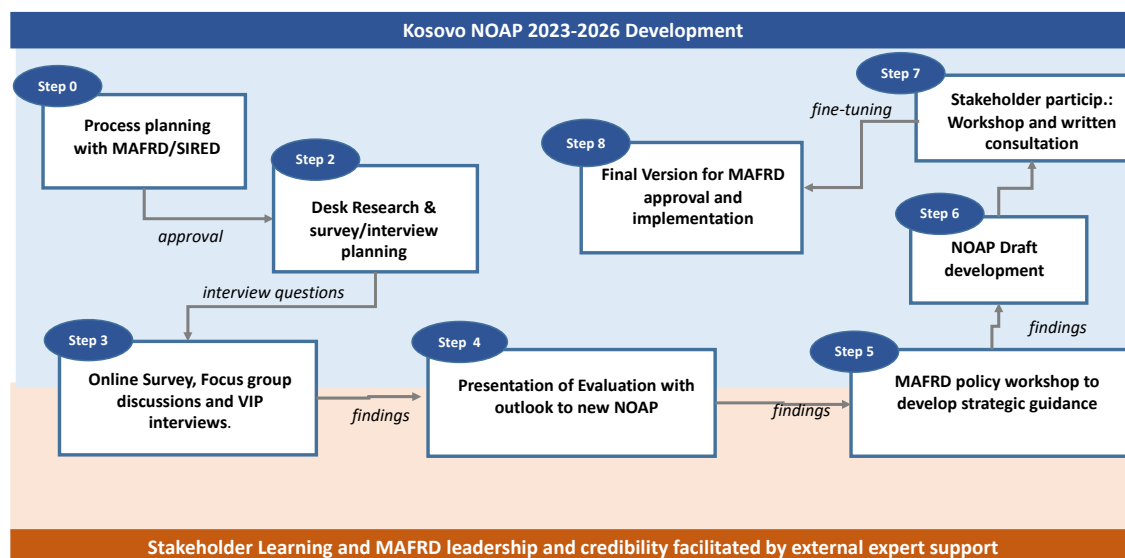


Figure 7: Overview of the 8 methodological steps of the proposed process involving also opportunities for stakeholder learning.

A special emphasize in the preparation of NOAP 2023-2026 is given to stakeholders' participation. The aim has been to bring out the main needs of organic agriculture that are now included in the NOAP. The plan envisages the role and involvement of each stakeholder varying on their interest.

In meetings with focus groups and VIPs, the main points that were discussed were: 1) sector development update, what has happened in the organic sector since 2017 from different perspectives, including important events, important frameworks, changes, business developments, and experiences; 2) NOAP 2018-2021 evaluation, including whether the NOAP was helpful, and which NOAP objectives were met, and what which not 3) sector analysis and SWOT analysis of Kosovo's organic sector and 4) new policy wishes for NOAP.

This has made it possible to identify the actors responsible for the implementation of actions and the possible sources of funding, together with a timeframe for the implementation and indicators for NOAP monitoring.

Part 3 Vision 2027 and objectives

Kosovo aims at a fully functional, successful, sustainable, and nationally and internationally well-renowned organic food and farming sector. An increasing number of stakeholders including farmers and businesses produce accessible, environmentally sustainable organic food, drinks, textiles, and other organic products for the local and export markets. Relevant and high-quality services such as sector coordination, match making e.g. in trade fairs and internet platforms, certification, advisory services, research, laboratory services, education and promotion support the value chain actors. Fair and well implemented rules and regulations are in place.

The Kosovo organic sector is made up of businesses that are profitable, that provide fair wages and that have good working conditions for all. They have access to excellent market intelligence to inform their decision-making processes. Those working in, or wishing to enter the Kosovo organic sector have high levels of skills and knowledge about all aspects of their business.

The operators collaborate with smart and united structures e.g. cooperatives of smallholders for processing and marketing, national commodity promotion bodies and national organic umbrella organizations.

The universities and development agencies support with research and extension focusing on practical application for increasing productivity and profitability. They release generally untapped yield potential in organic systems and stimulate innovations. Colleges, universities vocational training institutions and third parties provide training to increase skills levels including for good agriculture practice and entrepreneurial skills, and they bring new people into the organic sector.

A small range of Kosovan Organic products with comparative advantages such as medical and aromatic plants (MAP), berries and honey are exported in an excellent quality with reliable traders. The domestic market has a broad offer of local products from local producers that grow well in Kosovo (e.g. vegetables, cereals, oils, temperate fruits, nuts, dairy products, eggs, meat etc.), in which consumers trust with good reasons. The domestic market includes products that can't be produced and/or processed in Kosovo (e.g. coffee, rice, tropical fruits etc.) sustainably and need to be imported.

Consumers are well aware about the organic concepts, they have forums and organizations that critically observe the supply of the market and they have good information sources regarding process and production. They benefit from a good offer and availability of demanded products of good quality, which are fairly priced.

Kosovo organic farming further improves its ability to conserve and enhance the natural capital as organic farmers learn more about the impact of their work on biodiversity, soil, air and water, and modify their activity in response to research findings. In turn, the conservation and enhancement of natural capital builds a more resilient food system for Kosovo and conserves an environment for future generations. An increase in the proportion of land managed organically will ultimately help to reduce global greenhouse gas emissions and contribute to biodiversity.

To get closer to this vision, Kosovo has the following overall objectives until end of 2026

“A well-functioning Kosovo organic production on a relevant and increasing area supplying the domestic and export markets with attractive producer prices and satisfying the demand of consumers. The market has suitable framework conditions and offers supporting services to further grow and to develop qualitatively.”

The overall objective translates into objectives in 4 areas, which are detailed in chapter 4.1.

Part 4 Strategy and action plan

4.1 Strategic plan

Kosovo has a holistic strategy of developing the organic market looking at all its aspects including the production, processing, trade and consumption as well as regulations and supporting services with a Market System Development (MSD) view (see figure 8). The strategy identifies four pillars of measures, which interact closely: A) Production and Processing B) Market facilitation C) Legislation, certification and policies and D) Research, education, training and extension.

We assume that if the organic sector has

- productive and profitable operations compliant with organic regulations;
- operations that are managed in line with organic principles and are therefore truly sustainable;
- transparent markets with informed suppliers, customers and market facilitators (statistics and rules);
- well accessible and attractive knowledge products for all parties (consumers, operators and governments/NGO);
- clear rules that are understood and accepted by the stakeholders;
- enforced rules for actors inside and outside the sector to protect integrity;
- access to new evidence and inspiration for innovation; and
- relevant learning opportunities on all levels,

the organic market will grow rapidly, provide growing income along the value chain, create consumer benefits and help sustaining agriculture and its social and natural environment. Based on this impact hypothesis the action plan in chapter 4.2 details 4 activity areas and 19 measures to influence development towards the above described objective and vision.

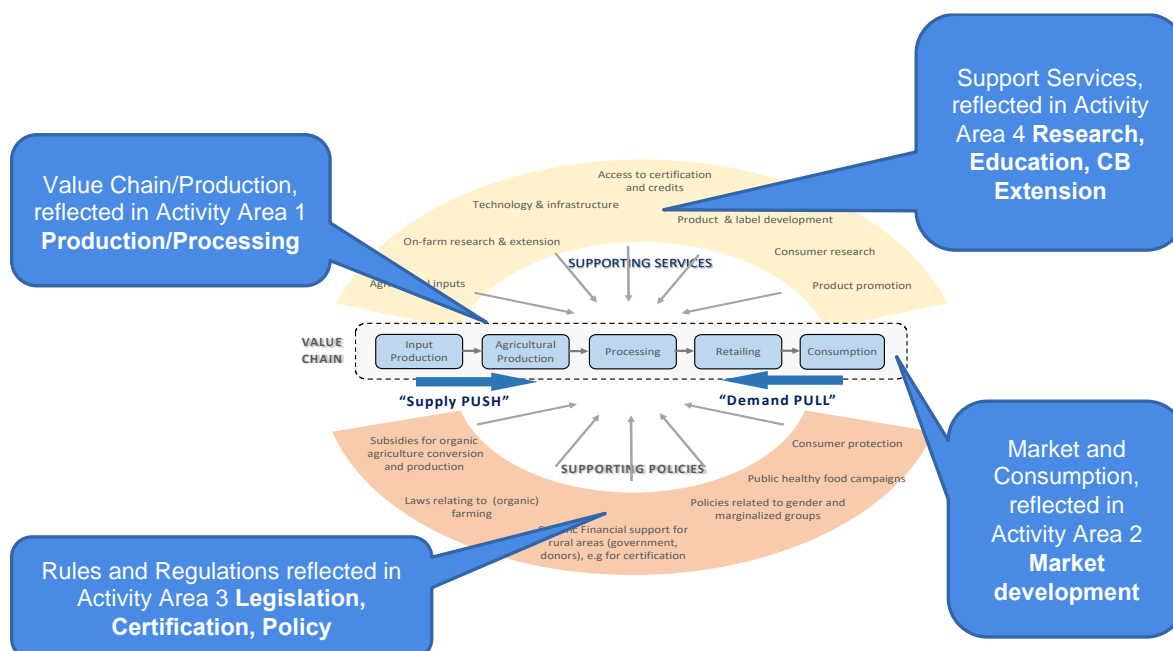


Figure 8: The so called “donut”, visualizing the organic market with the 4 strategic activity areas. (source donut: FiBL)

Activity area A: Production and Processing in the organic sector

Objective:

More operators produce on bigger areas more demanded agriculture products improving productivity, profitability and sustainability of the resources.

Strategy

Kosovo supports organic operations with subsidies for inputs, for certification and conversion, for land cultivation and infrastructure development.

Indicators and Targets by 2026 compared to 2022

- Certified organic agriculture land grows to 2500 ha (2020 1600 ha) and wild collection stabilizes at 350 000 ha (2020 373 kha)
- Average yield increases 10%
- Organic livestock increases 10%
- The number of organic operators increases to 150
- Operators have access to required inputs and services

Activity area B: Market development

Objective

A growing and more transparent domestic and export market.

Strategy

Governance and facilitation of the market and value chain along the MSD “donut” (see figure 8). The government invests in public consumer information (permanent website and information campaigns). It prepares and presents statistics for governance and for informing market participants, which are published annually. It analyses, assesses and reflects the key performance indicators and challenges of the market annually including for export and domestic trade. To facilitate trade, it issues an organic product logo based on certification. And it creates and publishes an organic directory, division of organic operators and supporting services.

Indicators and Targets by 2026 compared to 2022

- Introduction of organic public and anonymous cumulative statistics reflecting all NOAP indicators (areas, producers, crops, livestock, exports, consumer purchases, market data, certification data);
- Growth in all indicators of minimum 5% p.a.;
- National organic logo increasingly (+5% p.a.) known reaching brand recognition and brand recall of 25%/50% of people in Kosovo;
- Trust in national organic logo grows by 5% p.a.;
- Increased number of points of sale for organic products (# of outlets with >30 organic products).

More details see the action plan table 9 below.

Activity area C: Legislation, certification and policies

Objective

The organic sector benefits from supporting policies and investments as well as from enforced organic regulation.

Strategy

The Kosovo Government invests in development and implementation of organic supporting policies¹⁹ and in development and enforcement of the organic legislations with insiders and outsiders of the sector. It accredits the certification bodies and laboratories and exchanges with the private sector and the civil society. It maintains international relationship with other organic competent authorities abroad. It monitors and evaluates the NOAP development and decides if corrective measures are necessary. And it mainstreams its organic policy as coordinated in this NOAP in other national and local policy documents.

Indicators and Targets by 2026 compared to 2022

- NOAP promoted, implemented >90%, and monitored. Results are annually (2024, 2025, 2026 and 2027) assessed and publicly reported;
- Government and donor expenses for the organic sector increase including for governance, farmers payment, promotional programs and research/extension expenses;
- The Kosovo organic regulation - adapted either in line with EU organic regulation or purposely different - is well positioned for the local market;
- Certification bodies are formally accredited;
- A stable number of non-conformities per operator in certification;
- Enforcement of organic legislation also in livestock and also with non-certified actors that are using the term organic.

More details see the action plan table 9 below.

Activity area D: Research, education, training and extension

Objective

Effective and need based adaptive research, quality information dissemination, operator coaching and education is available.

Strategy

Innovation is promoted through research, education, training and extension. Research projects focus on the biggest needs of the sector to transfer international organic evidence/technology etc. to the Kosovo operations and to adapt production practices to local conditions in existing and new opportunity crops. Training also concerns general education and their curricula for consumer information and for vocational education for future organic professionals. The government and universities assure a national coverage of extension agents with organic competences. They also promote and support demonstrations for operators to show good agriculture practices and their impacts. The sector actors have the opportunity to participate in training. Once a year, a sector actor conference is held among others to create cooperation networks between MAFRD, researchers,

¹⁹ IFOAM Organics International provides a supporting policy toolkit: <https://www.ifoam.bio/our-work/how/regulation-policy/global-policy-toolkit>

associations, and farmers. There should be monthly meetings to exchange for the latest developments and technologies in organic agriculture.

Indicators and Targets by 2026 compared to 2022

- Access to quality advice for all operators;
- Access to information for consumers;
- Well-structured and performing institutional landscape (NGO and GO) of the organic sector;
- Organic is part of formal education curricula.

More details see the action plan in chapter 4.2.

4.2 Action plan

The Action plan in table 8 details the measures that are required to achieve objectives and targets. For each activity area/objective there are 4 – 7 action lines that require due attention. While the MAFRD takes the responsibility for NOAP as a whole including overall coordination, monitoring and government actions, many action lines are under the lead of stakeholder institutions. They report to MAFRD and at the same time advocate for further NOAP development. MAFRD itself reports to the government and public through direct channels or the media its investments and achievements.

The NOAP identifies 19 Action Packages in the four areas, which are:

Activity area A: Production and Processing in the organic sector

- A1 Subsidies for inputs
- A2 Subsidies for certification and conversion
- A3 Subsidies for land cultivation
- A4 Infrastructure development (subsidies for investments)

Activity area B: Market development

- B5 Public communication and promotion (consumer information)
- B6 Organic statistics and market information for operators
- B7 Value chain facilitation
- B8 Export promotion

Activity area C: Legislation, certification and policies

- C9 Organic law enforcement including CB accreditation for the certification against the national organic law.
- C10a Organic law revision adapting to the EU or
- C10b Organic law revision with an own strategy
- C11 Introduction of Kosovo Organic Logo for the domestic market
- C12 NOAP management, monitoring and enforcement.

- C13 Organic policy development and mainstreaming organic in overall Kosovo food system and education policies

Activity area D: Research, education, training and extension

- D14 Organic applied research
- D15 Adequate management of extension services and proper competence for organic advice for farmers.
- D16 Facilitation and networking of organic institutions in Kosovo and internationally
- D17 Capacity building in the organic sector
- D18 Integrate education about sustainable food, agriculture and organic systems
- D19 To strengthen the cooperation with international agencies.

Table 9: Action Plan

4.2.1 A Production and processing of the organic sector

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
1	Availability of required and suitable inputs for farming & processing	Subsidies for inputs.	Subsidies inputs on the market for products on the positive list with demand (seeds, biopesticides, organic fertilizers, pheromones, etc.)	MAFRD, Donors, Cross Border Projects	MAFRD	Caritas CH, GIZ, CNVP, PPSE, IADK, Organika, Private, Companies	List and number of subsidized products. Sales of products. Subsidy budget	MAFRD
2	Unaffordable costs for farmers for conversion and certification	Subsidies for certification and conversion	Support of new farmers in process of conversion and for certification, risk reduction support	MAFRD, Donors	MAFRD	Municipalities	50 farmers are estimated for the Calendar Year 2023 starting the conversion procedure.	MAFRD
3	Limited area of agricultural (cultivated) organic land.	Subsidies for land cultivation	Support of farmers for the land cultivation	MAFRD, Donors	MAFRD	Municipalities	About 2500 ha, in conversion/under organic agriculture by 2026.	MAFRD
4	Insufficient and inadequate infrastructure.	Infrastructure development (subsidies for investments)	Investment in physical assets as dedicated measure for organic sector	Donors	Farmers & companies	Caritas CH, GIZ, CNVP, PPSE, IADK, Organika	New storage Facilities, New packaging facilities.	MAFRD

4.2.2 B Market development

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
5	Insufficient public communication and promotion on organic sector.	Public communication and promotion (consumer information).	<ol style="list-style-type: none"> 1. Information Website explaining organic with attractive media; Information through media (social, tv, radio etc.); 2. Preparation of promotional materials for organic ag and labels 3. Multiplier information and animation (consumer associations, schools, vocational schools, retailers, NGO etc) 4. Information campaigns with partners and events. 5. Including curricula from the kindergarten to the universities; 	MAFRD and donors	MAFRD, Organika	Ministry of Trade Companies, Media, Donors, NGOs, Schools etc.	Label recognition and trust, Survey about organic principles knowledge	MAFRD
6	Insufficient market information of operators.	Organic statistics & Market information for operators	<ol style="list-style-type: none"> 1. Organic statistics including areas, production, operators, trade and consumption. Annual media report 2. Market analyze reports and opportunity analyses (e.g. demand) for export and domestic markets 3. BtoB information Website and newsletter with success stories 	MAFRD, Ministry of Trade	MAFRD, Ministry of Trade	Caritas CH, GIZ, CNVP, PPSE, IADK, Organika, Companies, Certification bodies	Organic statistics and growth data Availability and dissemination (downloads) of reports, use of Website and subscriber of newsletter	MAFRD
7	Lack of knowledge and support for value chain	Value chain facilitation and capacity building	<ul style="list-style-type: none"> • Increasing the knowledge and strengthening linkages between stakeholders' companies. • Promote membership in associations and exchange • Business development services training program • Support of national trade fair and its participation 	Ministry of trade, MAFRD	Organika, private sector	Caritas CH, GIZ, CNVP, PPSE, IADK, MAFRD, Ministry of Trade	Organika Members, trade fair participation, participation in key training event	MAFRD

8	Limited visibility at international fairs and unsatisfactory reputation for Kosovo organic	Export promotion	Participation in various international fairs for the recognition of Kosovo organic products worldwide. Presentations and promotion.	Ministry of Trade MAFRD	Organika, private sector	MAFRD, Caritas CH, GIZ, CNVP, PPSE, IADK, Ministry of Trade	Support to export companies and to increase the support for participation in different international fairs	MAFRD
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4.2.3 C Legislation, certification and policies

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
9	Fraud and lack of Organic law enforcement. Lack of trust in organic claim	Organic law enforcement	Capacity & resources in competent authority <ul style="list-style-type: none"> • Accreditation of CBs for local market • Identification of violation and fraud sources. Prioritization. • Awareness for incompliances and counseling for improvements in compliance of production and labeling. • Prosecution of law incompliances • Feeding experience in law development • To monitor implementation of Organic law and administrative instructions 	MAFRD	MAFRD	Certification bodies (for clients only) Consumer association Organika	Report for the law enforcement	MAFRD
10a	New EU regulation and need for Adaptation of the own legislation for organic agriculture	Organic law revision adapting to the EU	Legislation process to adapt the organic law to EU. Develop the administrative mechanisms and procedures. Create labs and other capacity to handle EU requirements Training of stakeholders and instruct CBs.	MAFRD	MAFRD	CBs, Organika	Recognition by EU	MAFRD

	according to the EU							
10b	New EU regulation without chance for equivalence	Organic law revision with an own strategy	Organic sector strategy development and capacity building for organic law instruments to apply guided by strategy Law revision process Training of stakeholders and instruct CBs.	MAFRD	MAFRD	CBs, IADK, Organika, Caritas CH, GIZ, CNVP, PPSE,	Own objective achievements	MAFRD
11	Lack of Kosovo logo for organic products.	Introduction of Kosovo Organic Logo for the domestic market	Create new logo for the Kosovo domestic market in a participatory process. Implementation of process, adequate organization and management of control integrated in the certification system. Fraud prevention and prosecution. Based on Administrative Instruction No. 07/2019 on designation of the organic production logo and specific requirements for labelling	MAFRD,	MAFRD or Organika ²⁰	Operators, CBs, Caritas CH, GIZ, CNVP, PPSE, IADK, Organika,	Time of Logo introduction Use of logo (registrations) Trust in logo by consumers	MAFRD
12	Proper NOAP Management	NOAP management, monitoring and enforcement.	Proper planning, implementation and monitoring of NOAP Yearly meetings with main stakeholders in organic sector to identify shortcomings Ensure continuous follow-up of NOAP from responsible stakeholders	MAFRD Caritas CH	MAFRD	All stakeholders	Annual report comparing achieved results with objectives and indicators.	MAFRD
13	New policy needs and incoherence in main policies	Organic policy development and mainstreaming organic in overall Kosovo food system and education policies	Identify issues in organic sector (opportunities and threats) Observe policy revision opportunities in Kosovo such as direct payments or agriculture strategy. Lobby for mainstreaming OA	MAFRD	MAFRD	Organika, IADK	Policy successes	MAFRD

²⁰ MAFRD if it will be a Government logo (as e.g. in the EU) and Organika if it will be a private sector logo (as e.g. in Switzerland)

4.2.4 D Research, education, training and extension

#	Issue	Action package	Action description/ Action-points	Budget source	Lead/ Responsibility	Support/ Participation	Indicators	Monitoring
14	Lack of local knowledge about organic practices	Organic applied research	Identify stakeholders' research priorities and needs Support for research projects on organic agriculture. To promote applied research on organic agriculture and relevant connected topics.	MAFRD Research projects, Universities	MAFRD	MEST MAFRD, Organika, IADK Universities, Institutes, FiBL, CIHEAM - Bari, University of Kassel, University of Wageningen	Research priority plan Organic research underway and completed	MAFRD
15	Lack of organic extension/ advisory services and demonstrations	Adequate management of extension services and proper competence for organic advice for farmers.	To enhance capacities of extension services for transfer of knowledge in organic farming.	MAFRD, (ARDP) Donors	MAFRD (extension service department) and contracted private companies, TAIEX	IADK, NGOs, researchers	training courses, demonstrations, organic farmers with access to advice. Satisfaction of farmers.	MAFRD
16	No common sector processes. Sector not well linked internally and internationally. Weak umbrella	Facilitation and networking of organic institutions in Kosovo and internationally	<ul style="list-style-type: none"> • Sector structure and regular meetings of working groups. Initiatives. • Annual sector event • Membership in IFOAM, MOAN and other key institutions • To be included in European research networks • Exchange visit to partner institutions in Europe • Relevant participation in BIOFACH and Organic European, Mediterranean and World congresses 	Sector contributions, donors	Organika	MAFRD, Caritas CH, GIZ, CNVP, PPSE, IADK,	Participation in events. Memberships	MAFRD

17	Insufficient capacity on individual, institutional and sector levels	Capacity building in the organic sector	Capacity building program for business development services on individual, institutional and sector leadership level	Sector institutions, MAFRD, donors	Organika	MAFRD, IADK, Caritas CH, GIZ, CNVP, PPSE, Local NGO-and Associations, Training service providers	Training days on individual, institutional and sector levels	MAFRD
18	Insufficient organic curricula in schools, vocational education, and Universities	Integrate education about sustainable food, agriculture, and organic systems	Introduce curricula for schools, vocational schools, Universities, and non-formal education. Supporting documents for teaching and teacher training. Specialized Vocational and University courses	MED, donors	MAFRD, MED	Universities, High schools, MAFRD, MED. IADK, Organika, CBs	New & updated curricula New teaching materials Qualified teachers Trained students on all levels	MAFRD
19	Capacity building & sector facilitation of international agencies	To strengthen cooperation with international agencies	To visit different European/Regional countries involving private/public experts, and student exchanges.	MAFRD, Donors	IADK, Organika	Caritas CH, GIZ, CNVP, PPSE, OAAK, CBs	New curricula New teaching materials Qualified teachers	MAFRD

Part 5 Appendices

5.1 SWOT summary

Strength (23 enumerations)	Opportunities (21 enumerations)
<ul style="list-style-type: none"> • The organic sector in Kosovo is continuously growing • Organic farmers and processors getting better equipped • Farmers have gradually strengthened their technical capacities 	<ul style="list-style-type: none"> • Favorable natural conditions and political willingness to support the organic sector • Donor programs are supporting organic agriculture financially and technically • Capacity building programs could strengthen the technical capacities • International demand for organic product • Farmers are open for organic production • New organic value chains under development
Weaknesses (53 enumerations)	Threats (22 enumerations)
<ul style="list-style-type: none"> • Still low level of technical capacities among organic operators • Lack of inputs • Weak extension service for organic farms and less research in organic agriculture • Small scale farms don't allow the effective use of modern technologies 	<ul style="list-style-type: none"> • Global economic and climate crisis can weaken organic sector development • Low consumer awareness about organic production and products • Insufficient support and leadership of MAFRD • Lack of labor forces in rural areas • No / low price margins for organic products • High costs for organic certification and inputs

Source: Online Survey among organic stakeholders in Kosovo, 2022²¹

²¹ Arbenz, M; T. Richter; A. Mehmeti (2022): The NOAP Kosovo Survey Report

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5.3 Legal references

The **Law No. 04/L-085 on Organic Farming** was constructed pursuant to the Council Regulation (EC) No. 834/2007 on organic production and labelling of organic products, and the Commission Regulation (EC) No. 889/2008 laying down detailed rules for its implementation. Eight Administrative Instructions (AI) were elaborated for the efficient implementation of this Law. The Tables of Concordance constituted the guidelines for the Administrative Instructions, which explain the procedures for the approximation and alignment with the EU Legislation. The Minister of the MAFRD had signed the Administrative Instructions on 17th January 2019, and the AIs were published on the Ministry's website.

The Administrative Instructions read as follow:

- AI No. 01/2019 on duties, responsibilities and composition of the Commission on organic farming;
- AI No. 02/2019 on organic production control system, Control Authority, control bodies and the rules for their implementation;
- AI No. 03/2019 laying down the rules for organic plant production;
- AI No. 04/2019 laying down the rules for organic livestock production and feed;
- AI No. 05/2019 laying down the rules on organic aquaculture production;
- AI No. 06/2019 on criteria, standards and conditions for imports of organic products in Kosovo;
- AI No. 07/2019 on designation of the organic production logo and specific requirements for labelling;
- AI No. 08/2019 laying down the rules for production and methods for organic processed products.

5.4 Participants

We thank the following participants for their contributions the development of the NOAP 2023-2026

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