

Horticultural Promotion in Kosovo

Survey on consumption habits and purchasing behaviour of fresh fruit and vegetables

Terms of Reference (ToR) August 2009

Introduction

The Horticulture Promotion in Kosovo (HPK) project was launched in 2001 with the overall goal of creating sustainable employment and income through the promotion of the horticultural-agribusiness sector, which help to improve overall rural livelihoods. The project, which started its 4th phase in January 2007, is implemented by the Swiss not-for-profit foundation – Intercooperation (www.intercooperation.ch) and is funded by Swiss and Danish governments.

Background information

In 2001, the Project conducted a survey related to the consumption habits and purchasing behaviour in Kosovo. The data collected, at that time, were published through a report called “Consumption Habits and Purchasing Behaviours of Fruits and Vegetables in Kosovo”. The assessment was realized thanks to the interviews of more than 1000 Kosovar households. Among the main findings of the study the most relevant were:

- Purchase of fruits and vegetables represented at that time 36% of the total food budget;
- 95% of the population said (2001) that they would not continue to buy imported fruits and vegetables if local alternative are available;
- The vast majority of the population seems to be satisfied with the fruits and vegetables offered in Kosovo.

Purpose of the survey:

Eight years after the first survey, HPK is planning to conduct a new survey related to the consumption habits and purchasing behaviour in regards to the fresh fruit and vegetables. The main expected outcomes are: i) an update of the current situation (part 1) which will be compared with the elements gathered during the first survey in 2001, ii) an overview of the main trends and opportunities (part 2) particularly for the quality standards issues, new products, and consumption, iii) an estimation of the general perception of the horticultural sector (part 3) development by the consumers.

Part 1: Current situation

The contractor should collect specific information, through a questionnaire, permitting to have a general overview of the consumption of fruits and vegetables (volumes, prices, quality, etc.). Furthermore, the contractor should compare the main new findings with the elements included in the previous survey realized in 2001. The points enumerated below should be prioritized by the contractor:

- Preferred fruit and vegetables
 - Particular periods of the year for purchases
 - Estimation of the volume consumed
- Budget allocated for F & V
 - Part of the F & V in the household expenses
- Place to buy F & V and why
- Perception of F & V from Kosovo in comparison with import
 - Packaging
 - Labelling
 - Quality (freshness, forms, taste, etc.)
 - Grading and sorting
 - Price
 - According to them which F and V are the most closer to the imported products in term presentation (form, packaging, etc.)
 - If the local product is not available which country of supplying will be prioritizing:
 - Albania,
 - Serbia,
 - Macedonia,
 - Turkey
 - EU countries
 - According to them what could be the main advantages of the Kosovar F & V rather than imported
- Top three determining factors to buy
 - Price
 - Freshness
 - Taste
 - Colour
 - Cleanness
 - Origin
 - Package
 - Labelling
 - Health & safety

Part 2 – Future trends and opportunities

The contractor should get information related to the main trends and opportunities of the horticultural sector in Kosovo. The points enumerated below should be prioritized by the contractor:

- ▶ Quality standards approaches
 - Willing to buy certified products
 - Willing to pay more for such quality standards. In other words- willing to pay more in order to get guarantee regarding food safety, traceability, grading, etc.
 - Willing to pay more for improved packaging
- ▶ Interest for new products
 - Already mixed and washed salad
 - Frozen Fruit and vegetables
 - Already washed baby carrots

- Fresh berries
- Interest for specific fresh F & V not cultivated in Kosovo (seasonal crops)

Part 3 – General development of the horticultural sector in Kosovo

In the last part of the survey, the contractor should identify the main perception of the consumers about the general development of the horticultural sector in Kosovo. The points enumerated below should be prioritized by the contractor:

- What is the most important things to be done in the horticultural sector in Kosovo
 - Import substitution
 - Improvement of the quality and presentation (packaging)
 - Food safety (code of production) – absence of residual pesticide
- Have you heard about Integrated Production (IP) approach in the past?
- According to consumers – how to increase the consumption of F & V in Kosovo
 - Marketing campaign (week of F & V, recipes, etc.)
 - Promotion in the schools
 - Should the local F & V should be more promoted
 - Who should lead a promotion campaign (supermarkets, government, producers, etc?)

3- Expected outputs of the survey

The outputs of the survey will be:

- A full report, not exceeding 40 pages. The report in English should show minimally the following elements: executive summary, methodology used, findings, for the part 1, 2, and 3, and a conclusion.
- The full data base and completed questionnaires

4- Suggested timelines

Items	Dates
▶ Request for proposal	Up to September 14
▶ Contract signature	Up to September 26
▶ Submission of the detailed methodology and questionnaire	Up to October 2
▶ Survey	Up to October 23
▶ Delivery of the first draft	Up to October 30
▶ Final report	Up to November 6
▶ Report presentation to stakeholders	November 20

5- Elements to be developed by the contractor

- i) Preparation of the questionnaire
- ii) Testing the questionnaire
- iii) Conducting survey with minimum of 1000 samples in different parts of Kosovo through stratified samples (young, old, rich, poor, and expatriate, urban, rural).
- iv) Report writing.
- v) Presentation of first finding in front of HPK staff.

vi) Presentation of main findings in front of the main stakeholders of the horticultural sector.

6- Type of organisation illegible

The survey will be conducted by a professional company, organisation, or NGO experienced in conducting similar surveys.

7- How to present a proposal

Organisations interested should present their proposal (offer) in two parts

Part 1: Technical

- General presentation of the organisation
- Experience of the company for similar survey
- Suggested methodology
- Staff (please add CVs of the key staff members to be responsible of the survey)
- Suggested timelines

Part 2: Financial

- Detailed budget per activities
- Payment schedule

For more information please contact:

Mr. Luan Hoti

Project Officer, Marketing and Communication
Horticultural Promotion in Kosovo
financed by the Swiss and Danish governments
and managed by Intercooperation

Office: + 381 (0) 38 243 034 ext: 106

Fax: + 381 (0) 243 169

Mithat Frashëri str. 6, PO Box 2, Pristina, Kosovo

luan.hoti@intercoopkos.org

www.intercoopkos.org