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PROCESSING INDUSTRY AND ITS POTENTIAL IN THE HORTICULTURAL SECTOR IN KOSOVO

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Abbreviations

MAP	Medicinal and Aromatic Plants
HACCP	Hazard Analysis of Critical Control Points (a food safety system applied in the food processing industry)
HPK	Horticulture Promotion in Kosovo, an Intercooperation project)
F&V	Fruits and Vegetables
GMP	Good Manufacturing Practices

Executive Summary

The main objectives of the assessment were:

- a) To evaluate and give a short overview of the present situation of the processing of F&V in Kosovo;
- b) To analyze the possible future improvements of F&V as well as MAP processing, already present in Kosovo and opportunities in F&V and MAP processing.

Processing of horticultural products is becoming more important as the market demand for fresh quantities of some of the fruits and vegetables is starting to be saturated by local production. The objectives of the assessment involved an evaluation of the existing situation in fruit and vegetable processing in Kosovo and its potential for the future.

In order to study the existing situation of the horticultural processing industry and propose ways to improve competitiveness, visits to a representative sample of the industries were made. The industries included large, medium, and small/cottage scale operations. Supermarkets and wholesale markets are like the “*pulse*” of the local food industry and visits were made to several of these as well.

It appears that there is a stiff competition between locally processed fruit and vegetable products and imported products from neighbouring countries, and it is feared that the local products are losing the competition. There are several likely reasons for this, which are: cost disadvantage, poor “presentation”, poor quality of locally produced products, and a virtual monopoly or over abundance of imported products in the market place.

Visits to the local fruit and vegetable processing industries revealed an underlying theme:

- (1) The processing units are operating far below their capacity due to a lack of raw materials, causing some units to be virtually shut down, and burdening overhead costs,
- (2) A total dependence on imported packaging materials and certain ingredients makes locally processed products expensive.
- (3) Total lack of product diversification, which further adds to overhead costs.
- (4) Poor sanitary conditions, particularly at small and cottage-scale operations, which contribute to quality and food safety issues.

The overhead costs could be reduced by keeping the units in operation all year round or increasing productivity through product diversification. Several product diversification ideas have been discussed with the unit owners and the details are presented in the report.

One way of making the locally produced products more competitive in the local market could be for the processors and the supermarket owners to work in cooperation to produce economical *supermarket-brand products*. This is done in other countries, where supermarkets produce their own brand name products and sell at competitive prices. This possibility would be a good situation for Kosovo because of the mutual advantage of the processors and the

supermarkets, not to mention for the benefits of the country as a whole.

Another way for the processing units to be competitive is to be innovative and produce unique products, unique at least to Kosovo. Again, this has been discussed with the owners of the processing units and details are presented in the report.

The total dependence of the Kosovo food processing industries on imported packaging materials, and a limited local market, necessitates innovative export considerations: (1) exporting semi-processed, including frozen foods, in bulk, (2) producing quality retail-products for the export market, assuming that the necessary packaging materials could be produced locally. This possibility assumes a considerable technical assistance to the processing industries in quality control and food safety (HACCP) issues.

Quality control and food safety are major issues with small and cottage-scale fruit and vegetable processing industries in Kosovo. For this reason promotion and support of large and medium-scale industries could be advantageous and beneficial. However, small and cottage-scale industries should also be upgraded from a *food safety* view point, and their products could then perhaps be suitable for small towns and villages.

Medicinal and Aromatic Plant (MAP) cultivation is significant in Kosovo. However, the MAP processors need technical assistance/guidance in the proper ways of handling their products, from a quality control / public health safety view point because they currently have problems in these areas.

In the absence of any food laws or food inspection programs in the country, which is desperately needed, the food processing industries have absolutely no guidance, and this is perhaps another reason that the locally produced products are losing the competition with the imported products. However, the food companies have an incentive to be competitive in the market place, with so many competing imported products. For this, the processing units need technical assistance to resolve several issues pointed out in the study and become competitive.

The HPK project could perhaps arrange for the desperately needed technical assistance to the processing industries, through the services of an experienced food technologist. The food technologist, through brief on-the-job training, could ideally “train the trainer” in each processing unit. This training should specifically pertain to: (a) day to day smooth technical operations of the company, (b) enforcing quality control procedures, and above all, (c) establishing food safety protocols. Technical assistance is also needed for the product diversification projects of each processor.

1. Present situation of processing of F & V in Kosovo

1.1 Competitiveness of F & V processing plants in Kosovo

Based on visits to a representative sample of horticultural processing enterprises it could be concluded that the industry in Kosovo is not competitive. First and foremost, the Kosovo products have a cost disadvantage over imported products. Secondly, their “presentation” is inferior to the imported products. Thirdly, the label information on some of the products is not accurate or is misleading, and there is no oversight by any governmental agency with respect to quality standards and food safety. Under these circumstances, needless to say, the local products have much difficulty competing with imported products in the market place.

The supermarkets are overwhelmed with imported products, compared to local products. It is not clear whether this is due to a lack of local products, or that the super markets prefer the imported products for better presentation and consumer preference.

One of the reasons for the high cost of locally processed products is the high cost of packaging materials and certain ingredients, such as, pectin which is essential for many of the processed fruit products. Another reason the high cost of products is the lack of cost-effectiveness in the processing industries, which is due to the fact that the processing units are shut down for considerable lengths of time because of a lack of raw materials. This puts a heavy burden on the overhead costs of processing operations. However, the lack of raw materials, causing processing plants to shut down, is not entirely justifiable, because there are certain raw materials in oversupply in the wholesale markets that could be processed. This means, the processing industries need to explore creative ways in keeping operations functioning all year round.

Introducing product diversification to the processing units is a means of keeping operations functioning all year round, thereby reducing overhead costs and thus becoming cost-effective. Product diversification, perhaps, could be the best approach currently available. For instance, the Pestova company could consider other “extruded fried snacks” (flour-based), when potatoes are not in season. This would fit in nicely with their existing processing-lines. Also, the company could diversify into other by-products from potatoes, such as potato starch, potato flour, and certain frozen convenience foods. By the same token, Agroprodukt could consider drying other raw materials, rather than just mushrooms: example: onions and other spices. Agroalbi processes just one condiment. The company could specialize itself as a “Spice Company” and produce a variety of spices and condiments. For instance, the company could import raw spices from the Far East and grind/blend/pack them at its plant—both for domestic as well as for export markets in the EU.

Any product diversification ideas must fit in well with the existing processing-lines and infrastructure: for instance, Agroalbi’s ideas of diversifying into fruit drying may not be a good idea as there could be product/flavour contamination between spices and fruits, unless the two operations are isolated, which could be expensive.

Because of cheaper labour in Kosovo, importing raw materials and processing in the country (as suggested above) could be a profitable proposition, particularly to export markets in the EU.

However, before the above could be considered: (1) arrangements need to be made for producing packaging materials locally in Kosovo, (2) a full-fledged agency to oversee the

enforcement of food standards and food safety needs to be established, (3) a sustained technical assistance to food processing industries needs to be available to ensure proper oversight for quality control and food safety.

1.2 Appropriate size of processing plants – small (on-farm), medium, or large scale

From studying the situation of all the three sizes of processing plants, it appears that large and medium-scale industries could be more appropriate for Kosovo. Large and medium scale industries are better equipped, both financially and manpower-wise, to meet the technical challenges of producing a quality product. The small and cottage- scale industries have serious food safety issues to contend with, and may not be ready (financially and otherwise) to compete for some time.

Regardless of the scale of operation, the processing industries desperately need technical assistance to guide them in: (a) day-to-day technical operations and trouble shooting in technical matters, (b) quality control and food safety issues, (c) product diversification projects.

1.3 Marketing issues

Under the current circumstances of highly competitive imported products in the market place, and considering the small local market of locally produced products, the processing industries and the supermarkets could cooperate to produce and promote supermarket brand products that could be marketed at competitive prices.

As to the export market, and again under the current circumstances of the country's dependence on imported packaging materials, the country might explore the possibility of exporting in bulk: either processed or semi-processed products. Exporting in bulk has several advantages: bulk packaging is much cheaper than retail packaging because there are no packaging designs or "presentation" issues to contend, unlike in retail packaging. There is simple processing and labelling.

However, the country could also consider producing export-quality processed products in retail packages, but the country is not ready for this as yet, because in order to do this: (a) the country has to produce its own packaging materials, (b) the processing industries need technical assistance to ensure proper quality control and food safety, in addition to assistance in day to day technical operations, (c) there is need for a governmental agency to enforce quality standards and food safety standards, (d) the processing units need to be HACCP-Certified, which is an involved process

Summarizing the situation, the horticultural processing industry has great potential, but it needs organization and assistance. It needs to organize in such a way that the growers, processors, and the supermarkets work together as a team for the benefit of all three groups and the country as a whole. The industry needs assistance (guidance) from the government in establishing quality and food safety standards (HACCP) and their enforcement. It also needs help in facilitating the economical access to packaging materials and other needed supplies.

1.4 Internal and external environment analysis

Internal factors

Perhaps the greatest **strengths** of the country, in relation to the project are, (a) plentiful availability of reasonably priced horticultural raw materials and medicinal and aromatic plants; and a tremendous potential for expansion of the raw materials, if necessary, (b) willingness, determination, and enthusiasm of the farmers and the processors in diversifying their operations, (c) considerable down-time, currently existing among processing operations, that could be put to profitable use, (d) availability of inexpensive labour –people in need of employment.

However, some of the **weaknesses** are: (a) a lack or absence of an arrangement between the horticultural producers (farmers) and the processors, which is essential for a successful horticultural processing industry, (b) a lack of technical assistance for quality control in processing operations, and in horticultural production operations, (c) a present lack of diversity in processing operations, which is essential for a profitable use of overhead, (d) many supplies, such as packaging materials and certain ingredients, need to be imported, which make local products expensive, (e) a lack of governmental oversight, in terms of quality standards and food safety, accounts for poor quality of local products. However, the processing industries should not wait for a governmental agency to establish quality and food safety standards: instead, they should take the lead in establishing the standards themselves to become competitive in the market.

External factors

There are tremendous **opportunities** in the market place to compete with imported processed foods, and also for exporting to Western European countries, in bulk or in semi-processed forms. The export market could be very attractive and competitive, considering the inexpensive labour force in the country, even if raw materials need to be imported. Also, as stated elsewhere in the report, the processors could contract with the supermarkets to market products under supermarket labels, for the benefit of either party. There are several greenhouses in the country, sitting idle, which could be very profitable for horticultural production, including spices, medicinal and aromatic plants.

The same opportunities to compete with imports, also pose **threats** to the local horticultural processing industries, because the supermarkets are flooded with imported products, and the local products are losing the competition. The threat could be considerably reduced if processors and supermarkets cooperate and promote locally processed products at competitive prices. As suggested elsewhere in the report, the local processors need to improve their “presentation”, quality, and food safety standards. Also, the threats from imports could be overcome by considering exporting either raw or semi-processed products in bulk. Bulk exports could be cheaper than exporting in retail packages.

Once the strengths and weaknesses are understood, overcoming any threats should be possible by careful planning. Summing up the situation, therefore, the horticultural producers, the horticultural processors, and the supermarkets should cooperate with one another for mutual benefit, and the country as a whole. For its part, the government should do everything possible to facilitate and support the processing industry.

2. Future in Fruit & Vegetable processing (improvements and opportunities)

2.1 Improvement of the current situation

The following are some considerations / recommendations based on the observations made in each of the processing companies:

1. First and foremost, it does not appear that locally processed foods are competitive enough with imported (processed) foods, which puts the processing units of the country at a disadvantage. One reason for the above is that the packaging materials and certain ingredients, particularly pectin, that is crucial to fruit products, are imported and expensive. Perhaps the Project /Government could support an industry to produce these important materials locally.
2. Another reason for lack of competition is that the locally processed foods do not have as attractive “presentations” as the imported food products. This could easily be remedied
3. One way of increasing the competitiveness is to be more cost effective. The processing units that were visited are either producing below their capacities or shut down for long periods of time, which makes them cost ineffective. They need to improve their productivity through product diversification.
4. The processing units do not appear to have a steady source of raw materials (fruits and vegetables) which, in fact, seems to be the reason for producing below capacity or shutting down operations for lengths of time. This situation could perhaps be improved by some system (contracting?) of closer cooperation between the farmers and the processors.
5. Some of the local processors need to improve their label presentation, which do not conform to international standards and are erroneous. This situation definitely affects competitiveness and needs attention.
6. The local food processors, rather than competing with the same imported products, might consider new and unique products. In fact, this point has been discussed with a local processor (Pestova) of potatoes, and the processor is taking action immediately.
7. There was a glut situation in the whole sale vegetable market for certain vegetables (potatoes, onions, cabbage) during the consultant’s visit; yet some processing units are idle because of lack of raw materials. This is not consistent with item No. 4, above. Needless to say, there does not appear to be a coordination between the farmers and the processors, which further strengthens the need for cooperation.
8. As a solution to the above situation (item 4 and 7), therefore, the processors could diversify their product lines, for profitability, by processing the glut items.
9. The supermarkets could contract the processors to produce products with supermarket-labels, and promote the products at competitive prices. This is being done in many countries, and could be explored in Kosovo. In fact, the situation is ideal right now.

10. None of the food processors visited, except Eurofood, had a qualified food technologist on their staff, nor did they have the benefit of any consulting services. Technical oversight is important, for smooth operations and better quality control. At a minimum, the production employees should have the benefit of on-the-job training by a qualified food technologist.
11. The government should establish an agency to enforce food standards, standards of identity, and food safety. Currently, it is understood that there is no such agency. As such, the processors have no guidance on food standards or food safety of the products they produce. This is particularly a problem with small and cottage-scale processors where food safety issues are rampant. However, as stated earlier, the processing industries need not wait for a governmental agency to take the lead; instead, they themselves can take the lead in upgrading their quality and safety standards in order to be competitive. For this, they need technical assistance.
12. In the interim, however, the Project / Government might consider contracting the services of an experienced food technologist, who could visit the processing units, provide on-the-job training, and attend to the technical issues listed in this study. He/she might also assist the companies in taking the lead in improving/raising standards of products to become competitive.
13. For the processing units to be competitive in the export market, however, they must first be HACCP-Certified. For HACCP certification of a company, the technical person in charge of the plant must first be trained in HACCP principles. After this, the company must produce products following the HACCP principles. Once this is accomplished, the company needs to apply for HACCP certification by a HACCP certifying authority. Needless to say, exporting processed foods is an involved process; particularly because many importing countries demand HACCP certification from their suppliers.
14. Because large and medium-scale industries are better equipped, both financially and manpower-wise, the Project should concentrate on these industries first in arranging for technical assistance to elevate their products to the quality of the imported products. While the small and cottage-scale industries may not have the financial resources to compete with the imported products, they should at least meet the minimum quality and food safety standards to market their products in small towns and villages. Therefore, they will also need technical assistance through on-job-training.

2.2 Opportunities in Fruit & Vegetable processing for Kosovo

The following products could be considered: (1) based on the availability of raw materials in general, and in some cases, to be used during the current down times of the processors, (2) based on novelty and uniqueness of the product, (3) finally and importantly, based on the suitability of the processors' existing equipment or with minor modifications for producing new products.

- a) Dried onions, and several other spice category agricultural raw materials. These products could be ideal for Agroalbi Company. Agroalbi could also import exotic spices, such as, black pepper, cinnamon, turmeric, etc in raw form and process locally.
- b) Dry mixes, such as, soup mixes, chocolate drink mixes, etc could also be produced by Agroalbi.

- c) Several potato products, such as, potato starch, potato flour, cooked and frozen convenience foods based on potatoes, could be produced by Pestova Company. In fact, some frozen convenience foods have actually been demonstrated to the processor.
- d) Several frozen vegetables could be produced by Agroprodukt and also by Pestova.
- e) Pickled mushroom production could be undertaken by any pickle processor, as a new and innovative item in Kosovo.

Fruit and vegetable products with a profitable potential in the future

All potato based products, and particularly, the proposed new products should have a future potential in the country, (1) because of the abundance of the raw material and (2) because of the uniqueness of the proposed new products. Dried onions and other spices should also have a potential. Frozen vegetables (locally grown) should have a potential, because of simple packaging and processing. Pickles would continue to have a great potential, if packaging and presentation matches imported products.

More difficult products for important substitution

Tomato based products, such as; ketchups, tomato sauces, etc could be difficult because of a dependence on imported tomato sauce. However, this situation could change (1) if proper varieties are grown locally, and (2) if a tomato processing (evaporation) plant can be established locally.

Several fruit products are difficult to compete, because of better presentations by exporting countries.

2.2.1 Types of possible processing units to be developed

As stated elsewhere in this report, tomato concentrate production could have a great potential. This would, undoubtedly, be a large scale processing unit. Currently, ketchup processors import their tomato sauce. Tomato concentrate could also be used for manufacturing tomato sauce, as such, Spaghetti Sauce.

It is understood that there is an area in the country where tomato growing is concentrated. This area could be encouraged to grow varieties suitable for tomato paste. Naturally, the tomato concentrate operation should be located close to this region. The proposed processing plant for producing tomato concentrate (sauce) needs an evaporator.

Again, as stated elsewhere in this report, the growers and the processors should enter into a contract. Such a contract would guarantee a steady supply for the processor, and a steady market for the grower(s).

Once a processing plant is established, there would be an incentive for more farmers to grow tomatoes. Also, it is quite possible to import tomatoes from neighbouring countries, if the demand is greater than the local supply. It should be cheaper to import raw tomatoes than tomato paste. Further more, value-addition has another advantage, employment creation in Kosovo.

The tomato concentrate equipment could also be used to concentrate other fruit juices, and therefore, need not sit idle when tomatoes are not in season. In this respect, therefore, it would

be beneficial for the tomato growers and fruit growers to work together with the tomato concentrate processor.

2.2.2 Niche markets

Potato products (particularly the new/novel products) and dehydrated onions could enjoy a potential niche export market, if properly promoted. Also mushrooms and certain berries / fruits could have an export market.

However, export in bulk should be considered, particularly to EU, since the cost of retail packaging could make the products prohibitive on the local market. Bulk export could be an unexplored potential and deserves pursuing. This would also involve frozen-export in bulk.

Cabbage seems to be in abundant supply, and could come under the unexplored category: Perhaps cabbage could be converted into “sour kraut” and an export market developed in Germany. In this connection, the new (new to Kosovo) pickled mushrooms should not be overlooked as a potential export product.

There may be a potential for niche market for MAP in the future, but currently the MAP facility visited is in such a poor condition that nothing can be considered until the facility drastically improves its business, in terms of operations.

2.2.3 Export Markets

Wild mushrooms could be one item that could have a potential for further processing locally. This includes the newly proposed pickled mushrooms. Apparently, there are not many semi-processed products that are being exported. However, onions, potatoes, and cabbage, even though they are not semi-processed, could have a potential. Also, MAP products, once the processing issues (described elsewhere in this report) have been resolved.

2.2.4 Know-how improvement

The technology used by vegetable processors in Kosovo is generally not modernized, except for a few exceptions such as Pestova. The new potato product ideas (product diversification / product extension) suggested for Pestova, for example, involve technology transfer and some on-the-job training, at a minimum. In some other cases, there is lack of important machinery used in processing or semi-processing; some facilities have only basic machinery.

In general, there is a lack of quality standards (and food safety standards) in processed products destined for export in Kosovo. Few of the processing units present in Kosovo have implemented HACCP. However, the units which have achieved this standard are the most important exporters of processed or semi-processed products.

On the other hand, there is a general lack of well-qualified personnel (such as agro industry engineers, food technicians) in Kosovo. This situation of lack of know-how represents an issue for some processing units.

ANNEXES

Annex 1 - Mapping of fruit and vegetable processors in Kosovo

Main fruit and vegetable processing companies and their characteristics							
Name of Processor	Location	Type of enterprise	Technology	Products	Markets	Packaging	Waste management
Pestova	Vushtri	Limited liability enterprise - large scale potato processor	Upgraded technology (and storage) for potato chips and frozen products HACCP system in potato chips line	Potato processed products	Kosovo, Albania, Macedonia, Montenegro	Aluminium double layer for the chips, plastic bag for frozen products	Some processing of potato skin and goes for animal feed
Progresi	Prizren	Commercialized by two private companies, unprivatized - large scale vegetable and fruit processor	Very old technology, infrastructure, building - need for huge investments	Pickled products, ajvar, different preserves, different jams and marmalades, tomato concentrates, ketchup, canned vegetables	Kosovo, Macedonia, Switzerland, Austria, and some sporadic export to countries like Dubai	Glass jars, cans, plastic containers etc.	very old technology, wastes can be problematic

Main fruit and vegetable processing companies and their characteristics							
Name of Processor	Location	Type of enterprise	Technology	Products	Markets	Packaging	Waste management
Agroprodukt Commerce	Podujeve	Private company - large scale vegetable and fruit processor	Generally appropriate technology (and storage) for their present operations HACCP system in mushrooms line	Fresh, frozen and dried packaged wild mushrooms, wild fruits like wild blueberries, juniper berries, rosehip,	Export markets mainly Italy and other EU countries	Containers, boxes, plastic bags	n/a
Eurofood	Prizren	Private company - mid scale fruit processor	Basic technology for jam and marmalade processing, ketchup and mayonnaise packaging	Marmalades, jams, ketchup, mayonnaise	Kosovo, Albania, bulk quantities of marmalade to Macedonia	Glass jars, plastic containers etc.	n/a
Etlinger	Shtime	Private company - mid scale vegetable processor	Basic technology for pickle processing	Different pickled products	Export mainly to Austria	Glass jars, plastic containers	n/a

Main fruit and vegetable processing companies and their characteristics							
Name of Processor	Location	Type of enterprise	Technology	Products	Markets	Packaging	Waste management
Agroalbi	Ferizaj	Private company - mid scale processor	Basic technology for grinding, mixing and packaging final products from dry vegetables and spices/herbs	Food condiments, spices	Kosovo market, export to Albania	plastic bags, plastic containers	n/a
Rudi company	Gjakove	Private company - mid scale vegetable processor	n/a	Different pickled products, ajvar,	Kosovo market, n/a info on export	Glass jars	n/a
Idea	Prishtine	Mid scale vegetable processor	n/a	Different pickled products, ajvar, preserves of mushrooms, jams, marmalades	Kosovo market, n/a info on export	Glass jars, plastic containers etc.	n/a

Main fruit and vegetable processing companies and their characteristics							
Name of Processor	Location	Type of enterprise	Technology	Products	Markets	Packaging	Waste management
Rugova cooperative	Peja	Private company - mid scale fruit processor	Basic technology for washing, packaging and storing blueberries and other wild fruits and mushrooms	wild blueberries packaged in fresh and frozen form	Kosovo market, small export to neighbouring countries	Stereo foam and plastic cover etc.	n/a
Fitimi company	Drenas	Private company - small to mid scale vegetable processor	Basic technology for pickle processing	Different pickled products, salads, mixes, and cabbage sour kraut	Kosovo market	Glass jars	n/a
Freskija	Gjakove	Small scale fruit and vegetable processing	Basic technology for jam processing	different soft fruit jams, compotes, juices, concentrates, vegetable pickles	Kosovo market	Glass jars, plastic containers	n/a
Agroprodukt Syne	Istog	Private company - mid scale MAP processor	Basic technology for drying, grinding, mincing MAP	Processed and dried MAP products	Export markets, EU countries and Kosovo	paper bags, plastic bags	n/a

Main fruit and vegetable processing companies and their characteristics							
Name of Processor	Location	Type of enterprise	Technology	Products	Markets	Packaging	Waste management
Bylmeti	Fushe Kosove	Private company - mid scale dairy processor	Dairy processing technology	pickled peppers in cream and other dairy processed products	Kosovo, export to Albania	plastic containers	n/a
Floren	Suhareke	Private company - meat processing	n/a	salami including pickled vegetables and other meat products	Kosovo market, n/a info on export	salami wrapping in plastic film	n/a
Drita e Krushes	Prizren	Farmer women association - small scale fruit and vegetable processing	None; handmade products	different pickled vegetables, ajvar and other homemade products	Kosovo	Glass jars, plastic containers	n/a
Meka	Dragash	Private company - meat processing and frozen vegetable packaging	packaging of frozen vegetables (imported)	frozen vegetable mix in plastic bag	Kosovo	plastic bag	n/a

Annex 2 – Fruit and vegetable processed products currently in the market

Products	Origin
JUICES	(Share of imports in the supermarkets = 100%)
Jaffa apple cranberry 0.5L	Macedonia
Jaffa clear apple 100% 0.25L	Macedonia
Jaffa clear apple 100% 1L	Macedonia
Jaffa juice apple/raspberry 1.5L	Macedonia
Jaffa apple and raspberry 0.5L	Macedonia
Jaffa peach 50% 1l	Macedonia
Aspis juice peach 1l	Greece
Bravo juice brik apple 0.2l	Austria
Bravo juice brik peach 0.2l	Austria
Bravo juice apple green 0.5l	Austria
Bravo juice apple green 1.5l	Austria
Bravo juice multired.ebc 0.5l	Austria
Bravo juice multired.ebc 1.5l	Austria
Amita different fruit juices	Greece
Fructal blueberry 0 2L	Slovenia
Fructal strawberry 0.2L	Slovenia
Fructal apple 0.2l	Slovenia
Fructal juice apple 100% 1 L	Slovenia
Fructal peach 0.2l	Slovenia
Fructal sour cherry 0 2L	Slovenia
Frutek juice pear rosehip 125ml	Import
Frutek juice apple 125ml	Import
Frutek juice apple and kamomil 125m	Import

Products	Origin
Frutek juice sour cherry 125ml	Import
Frutek mix fruit 190gr	Import
Frutek apple 120gr	Import
Frutek apple and sour cherry 190gr	Import
Frutek potato and carrot 120gr	Import
Hipp children juice pear 0.2l	Austria
Hipp children juice strawberry etc 0.75l	Austria
Hipp children juice carrot 0.2l	Austria
Hipp children juice apple and rosehip 0.2l	Austria
Hipp children juice apple and grape	Austria
Hipp children juice carrot 0.2l	Austria
Hipp children juice apple and rosehip 0.2l	Austria
Hipp children juice apple and grape	Austria
Hipp children pure apple and maraje 100gr	Austria
Pfanner 100% juice apple 2l	Austria
Pfanner juice wild fruits 2l	Austria
Pfanner juice apple green 2l	Austria
Pfanner juice peach 2l	Austria
Tamek different fruit juices	Import
Dana different fruit juices	Import
Favola different fruit juices	Import
Takovo different fruit juices	Serbia
Eks fruit drinks packaged in Kosovo	Kosovo
Dona fruit drinks packaged in Kosovo	Kosovo
Tango fruit drinks packaged in Kosovo	Kosovo
Frutti fruit drinks packaged in Kosovo	Kosovo
Vjosa fruit drinks packaged in Kosovo	Kosovo

Products	Origin
JAMS & MARMELADES	(share of imports in the supermarkets = 80%)
Metin jam strawberry 385gr	Turkey
Metin jam strawberry 730gr	Turkey
Metin jam quince 385gr	Turkey
Metin jam apricot 385gr	Turkey
Metin jam blackberry 385gr	Turkey
Metin jam blackberry 730gr	Turkey
Metin jam raspberry 385gr	Turkey
Metin jam raspberry 730gr	Turkey
Metin jam sour cherry 385gr	Turkey
Metin jam sour cherry 730gr	Turkey
Progresi different jams and marmelades	Kosovo
Eurofood different jams and marmelades	Kosovo
Idea different jams and marmelades	Kosovo
Sch.koppe diet jam strawberry 250g	Germany
Sch.koppe diet jam mix fruit 250g	Germany
Schwartau marmelade blueberry 340gr	Germany
Schwartau marmelade rosehip 340gr	Germany
Schwartau marmelade plum 330gr	Germany
Schwartau marmelade mix fruit 340gr	Germany
Schwartau marmelade raspberry 340gr	Germany
Schwartau marmelade ribizle e zezë 340gr	Germany
Schwartau marmelade sour cherry 340gr	Germany
Sommer garten different jams	Germany
Vitalia diet marmelade strawberry 370g	Macedonia
Vitalia diet marmelade plum 370g	Macedonia

Products	Origin
Vitalia diet marmelade blackberry 370g	Macedonia
Vitalia diet marmelade raspberrye 370g	Macedonia
Vitalia diet marmelade peach 370g	Macedonia
Tomato SAUCES & KETCHUP	(share of imports in the supermarkets = 75%)
Polimark ketchup sweet 500gr	Serbia
Polimark ketchup i hot 500gr	Serbia
Polimark ketchup sweet 500gr	Serbia
Polimark ketchup pica 500gr	Serbia
Develey tomato sauce curry 250ml	Import
Heinz tomato sauce barbecue 180ml	Import
Barilla tomato sauce arrabbiata 400gr	Italy
Barilla tomato sauce basiliko 400gr	Italy
Barilla tomato sauce domate/vegetables 400g	Italy
Barilla tomato sauce melanzane 400g	Italy
Barilla tomato sauce olive 400g	Italy
Barilla tomato sauce pesto genov.190g	Italy
Barilla tomato sauce pomodoro 400gr	Italy
Barilla tomato sauce tuna 400g	Italy
Campagna tomato sauce arrabbiata 350gr	Italy
Campagna tomato sauce bolognese 350g	Italy
Campagna tomato sauce doma.basil 350g	Italy
Victoria tomato sauce napoletane 350g	Italy
Victoria siciliana tomato sauce 350gr	Italy
Divella different sauces/ketchups	Italy

Products	Origin
Pomi different sauces/ketchups	Italy
Mutti different sauces/ketchups	Italy
Branoro different sauces/ketchups	Italy
Buitoni different sauces/ketchups	Italy
Cordoro different sauces/ketchups	Italy
Natureta different sauces/ketchups	Import
Vesu different sauces/ketchups	Italy
Domatti different sauces/ketchups	Italy
Vital ketchup	Import
Bonum Ketchup	Macedonia

PICKLES PRESERVES ETC.

(share of imports in the supermarkets = 60%)

AJVARS

Abi Ajvar 690 gr	Kosovo
Idea ajvar	Kosovo
Rudi company ajvar	Kosovo
Vipro ajvar hot homemade 720gr	Macedonia
Vipro ajvar sweet 720gr	Macedonia
Vori ajvar	Macedonia
Visan ajvar	Import
Podravka ajvar	Croatia
Ceren ajvar	Import

PICKLES

Abi cucumbers 680 gr	Kosovo
Rudi company different pickled products	Kosovo

Products	Origin
Idea different pickled products	Kosovo
Bonum different pickles	Macedonia
Vori different pickles	Macedonia
Natureta different pickles	Import
Zvijezda different pickles	Import
Prima different pickles	Macedonia
Bonvita different pickles	Import
Ceren different pickles	Import

PRESERVES

Abi leaves grape 600gr	Kosovo
Abi mushrooms cut 700gr	Kosovo
Abi progres leaves cabbage 1.4kg	Kosovo
Abi red beet 700/680gr	Kosovo
Vipro peppers roasted 720gr	Macedonia
Cannaco preserved mushrooms	Import
La perla preserved mushrooms	Import
Bonum preserved mushrooms	Macedonia
Progresi preserved mushrooms	Kosovo
Idea preserved mushrooms	Kosovo
Bonduelle canned green peas	Import
Divella canned green peas	Italy

POTATO PRODUCTS

Evko mashed potatoes 3x4 360g	Import
Slap mashed potatoes	Import
Albad mashed potatoes	Import

Products	Origin
Sonceva mashed potatoes	Import
Dolina mashed potatoes	Import
Gllareva mashed potatoes packaged in Kosovo	Import

FOOD CONDIMENTS

(share of imports in the supermarkets = 70%)

Aleva Kulinat food condiments 250 gr	Serbia
Aleva Kulinat food condiments 500 gr	Serbia
Podravka soup tyrolese 67gr	Croatia
Podravka soup vieneze 70/62gr	Croatia
Podravka food condiments 250gr	Croatia
Podravka food condiments 250gr	Croatia
Podravka food condiments 500gr	Croatia
Kucharek food condiments	Import
Divella food condiments	Italy
Vitaminka food condiments	Macedonia
Agroalbi Vego food condiments	Kosovo
Vegeton food condiments	Kosovo
Unijapak food condiments	Import
Ceren food condiments	Import

FROZEN VEGETABLES AND FRUITS

(share of imports in the supermarkets = 100%)

Frikom green peas 450g	Serbia
Frikom gold vegetables mix 450gr	Serbia
	Serbia

Products	Origin
Frikom gold vegetables mix 450gr	
Frikom corn with no added sugar 450gr	Serbia
Frikom vegetables mix 450g	Serbia
Frenzel frozen vegetable products	Germany
Higlo frozen vegetable and fruit products	Import
Meka frozen vegetables	Import

FRUIT YOGHURTS

(share of imports in the supermarkets = 100%)

Frutiss yoghurt malinë and blueberry 4x125	Import
Fruttis yoghurt fruit strawberry 4x125	Import
Fruttis yoghurt cherry and strawberry 4x125	Import
Fruttis yoghurt blue.raspb 4x125g	Import
Jogobella yoghurt fruit 500gr	Import
Jogobella yoghurt fruit 500gr	Import
Jogobella yoghurt fruit 150gr	Import
Jogobella yoghurt fruit light 150g	Import
Mu yoghurt fruit	Slovenia
Dukat yoghurt fruit	Import
Fruchtegut yoghurt i fruitve 125g	Germany
Fruchtegut yoghurt i fruitve 500g	Germany

VEGETABLES IN THE MEAT INDUSTRY

(share of imports in the supermarkets = 80%)

Kras salami vegetables	Import
Floren salami vegetables	Kosovo

VEGETABLES IN THE DAIRY INDUSTRY

(share of imports in the supermarkets = 0%)

Bylmeti peppers in cream	Kosovo
Abi peppers in cream	Kosovo

References:

Kotherja, E. (2009), An Overview of Vegetable Processing in Kosovo

Kotherja, E. (2009), An Overview of Fruit Processing in Kosovo