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SPHP-K

Consumption habits and purchasing behaviours of fruits and vegetables in Kosovo

Lionel Giron
Chief Technical Adviser
With the collaboration of Luan Hoti

Pristina, September 2001

Swiss Project for Horticultural
Promotion – Kosovo
Fehmi Agani Street
Arbria 1, nr 3
Pristina Kosovo

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Abbreviations

SPHP-K	Swiss Project for Horticultural Promotion
SD	Standard Deviation
SDC	Swiss Agency for Development and Cooperation
PR	Prism Research
DM	Deutsch Marks
DK/DWA	Don’t know / Don’t want to answer
F&V	Fruits and vegetables
F or V	Fruits or vegetables

1. Executive Summary: main findings of the study

- **1026 Kosovar households** have been interviewed according to a split of respectively 65% urban households and 35% rural households.
- **Purchases of fruits and vegetables** represent approximately **36% of the total food budget**, which is 552 DM on the average per month per household out of monthly income estimated at 866 DM.
- The purchase of **processed F&V** is completely **marginal** in the overall consumption.
- The most popular fruits (meaning the ones consumed in the biggest quantities) are **Bananas** and **Apples**; when the most popular vegetables are **Tomatoes**, **Peppers** and **Potatoes**.
- The **maximum acceptable prices** mentioned by the consumers are **close** to the prices monitored on the **Pristina main market place** (probably one of the most expensive).
- The vast **majority of the population** seems to be **satisfied** with the fruits and vegetables **offer in Kosovo**: 72% declared that there is not any F&V they particularly like, which is lacking in Kosovo. For the others the mentioned commodities are mainly exotic ones.
- **35%** of the population buys **special fruits and vegetables for special occasions**, this then represent a **niche market** that could be explored by some advanced producers. Although the most generally mentioned fruit is banana (can't be produced in Kosovo).
- **95% of the population would not continue to buy imported products if there was a local alternative**. This should act in the sense of promoting reestablishment of orchards.
- When purchasing fresh F&V, the consumers are mainly caring about **Price** and **Freshness**. All the other attributes. Cleanliness and Taste enter in the decision to a lesser extent.
- **Good quality** for F&V in Kosovo is defined by **Freshness, Flavour, Cleanliness** and **Price**, which comes only on the 4th position as a proxy for quality. **Freshness** then is assessed through the **Colour, Flavour and Appearance**. These 2 results show that the consumers are not used to rely on brands or identified producers but rather on their own judgement at the point of sale.
- The consumers mainly buy F&V on **markets** (**59%**) and **wholesale, discount shops** or directly to the **trucks** (**19%**). The main reason for choosing this point of sale is the display of **good p**roducts (**39%**), a **favourable p**rice (**34%**), and **convenience** because of its close location (**21%)**.
- There is a significant **preference for F&V that would be produced in Kosovo** (**55%**) of the population. This is confirmed by the perception that the produces from Kosovo are at least of an **equal quality to the imports** (**62%** of the population).
- The **main advantage of the local products** is definitely their **freshness** and to a lesser extent their more attractive **price**.
- Only **29%** of the population is familiar with **winter vegetables**, meaning that most of the consumption is oriented towards summer F&V. Some products such as **cauliflower** and **broccoli** could appear has interesting **niche markets**.
- **Dried fruits** are traditionally quite **common** in Kosovo, but **dried vegetables** are extremely **rare** except beans.

2. Presentation of the SPHP-K and the purpose of this study

End of December 2000, Intercooperation has been mandated by the Swiss agency for Development and Cooperation for implementing the Swiss Project for Horticultural Promotion in Kosovo.

The project started in February 2001 for a 22 month pilot phase ending in December 2002. Within a scope of 5 to 8 years, the strategy of the project will be to implement structures and mechanisms that will guarantee the sustainability of the project's outputs, meanwhile seeing the external support decrease and replaced by the raising local resources.

The overall goal of the project is to promote in a sustainable way employment creation in rural areas by supporting one of the most dynamic and promising agricultural sub-sector: horticulture.

Sustaining the employment creation implies to support the enhancement of the horticultural sector performances.

Therefore the action of the project will be focused on two main fields of intervention, both closely linked in the definition of market-driven strategies: technical agronomic support to groups of producers in order to see their crop yields and quality improved, their crops diversified and at the end of the day, their commodities being able to compete with imported fresh vegetables and fruits. And on the other hand, facilitate the creation of market awareness among the producers and support the development of real market mechanisms and information.

This study fits into this second field of action. Indeed, facing a situation where there is hardly no information available on the market trends, we perceived, as a project aiming at enhancing the performance of the horticultural sector that we had to undertake a study that would "bring into light" the consumption habits and purchasing behaviours of fruits and vegetables in Kosovo.

The work undertaken results in the following report. It is fairly descriptive but we still tried to integrate some analysis and comments of the data collected also based on our experience of the Kosovo context.

After a quick outlook of the methodology used we will start by describing and analysing the consumption of fruits and vegetables before scrutinising the purchasing behaviour of the consumers in Kosovo.

3. Methodology

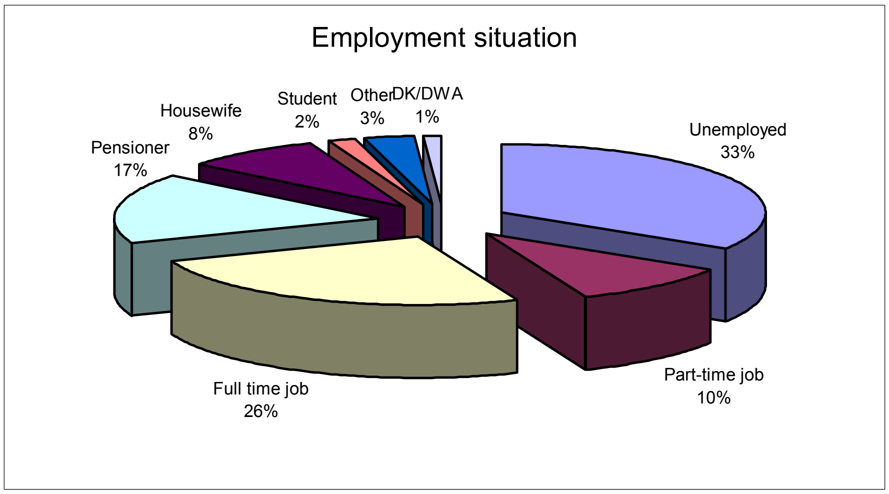
Prism Research, a multinational market, media and public opinion research company interviewed 1026 households, with a questionnaire elaborated on the base of terms of reference defined by the SPHP-K and administrated in June 2001. Out of a population of roughly 2 millions inhabitants, we considered that a sample of about 1000 respondents was significantly representative.

No household from Serbian enclaves were interviewed for the reason that the study aimed at assessing some market mechanisms from the consumers' point of view; and obviously the situation in the enclaves constitutes in itself a major bias for analysing consumption habits and purchasing behaviours (difficult supply, consumers coping with what comes into the market but no real choice out of a varied supply, etc.).

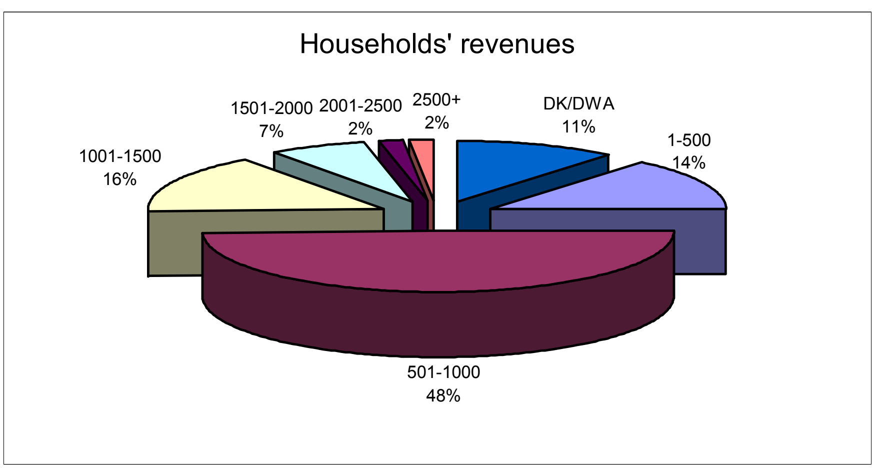
Among this sample of the Kosovar population, 65% of the interviewees were urban citizens and 35% were rural. The split between males and females was respectively 63,3% of male;

36,7% of female. This was not a deliberated choice but the interviewers had the task of interviewing the person who was actually in charge of making decisions for the purchase of fruits and vegetables.

- The average age of the sample interviewed is **42,6 years old.**
- The average **number of households' members is 7,66.**
- The average number of **children per family is 2,7**. Usually several families compose 1 household, which means that the number of children per household is actually higher than this mean.
- The employment situation reveals that there is "only" 33% of the population unemployed and there is actually only 36% of the population being really active. But still 42,8% of the sample declared receiving a salary. A very marginal share of the sample declared receiving any other type of revenue (such as remittances from abroad: 12,8%). This is most likely a lot underestimated by this present study, as this type of data is usually extremely difficult to collect.



- Concerning the Kosovar households revenues the majority of the population earns between 500 and 1000 DM, with a minority earning less than 500 DM. These relatively low revenues actually represent quite a constraint for the development of horticulture in Kosovo. Indeed, a significant share of these revenues is already allocated to food commodities and there is not necessary space for increasing the product range with other products, especially if they are more expensive. The issue of price will be analysed in details in the next paragraphs. The **average monthly income** for the sample is **866 DM**.



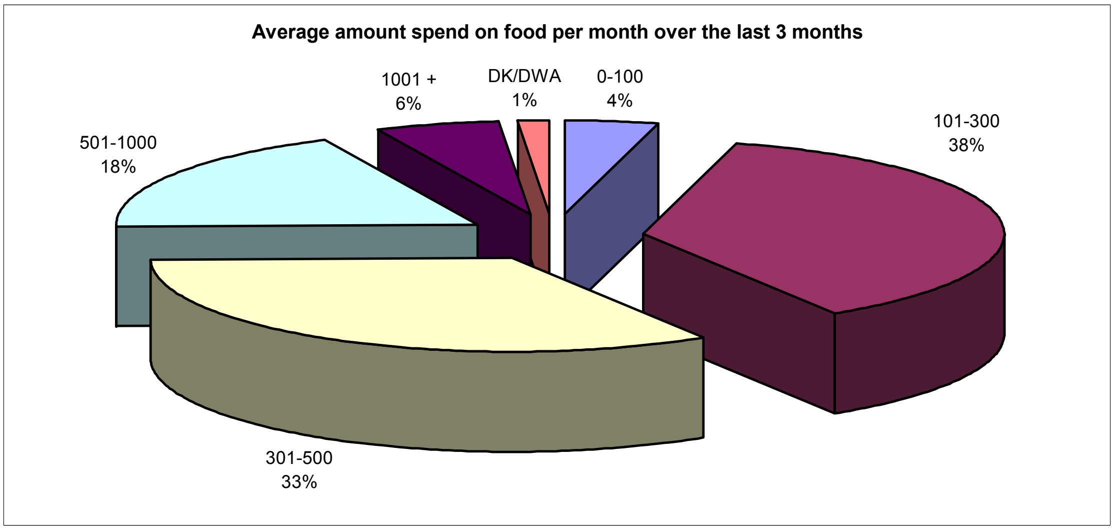
4. Fruits and vegetables consumption in Kosovo: budgets, quantities and particular habits

4.1. Households food budget

On the average and Kosovo wide the monthly food budget for a Kosovar household is 552 DM, but it greatly varies as shown by a SD of 732 DM.

The difference between the rural and urban households, even though it is small remains significant: 529 DM for a rural household (SD: 665 DM) and 564 DM for an urban household (SD: 766 DM). The SD underlines the fact that variations of food budget are actually bigger in the urban areas.

The difference in terms of budget between male headed or female-headed household is not really significant, although male headed households spend more on food, with respectively 555 DM against 547 DM for the women (SD: 740 DM and 717 DM).



42 % of the population reported spending less than 300 DM in food per month, when 51 % spends between 301 and 500 DM. With the further details below, it actually shows that the fruits and vegetables represent a high share of the household food expenses (in comparison with some Western European countries standards).

4.2. Expenditures for fresh or processed fruits and vegetables

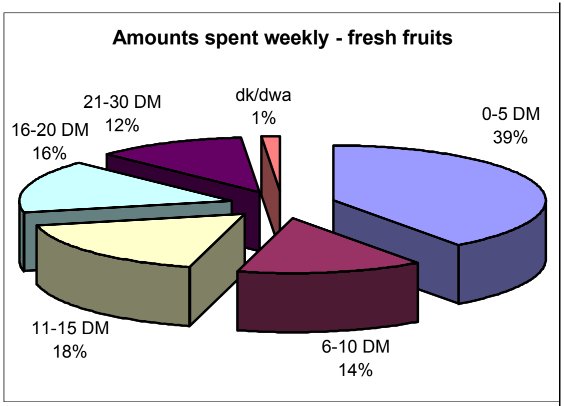
We looked at these expenditures on a weekly basis and on a monthly basis. The results are presented in the 2 following tables, and completed by the 4 charts on the following page:

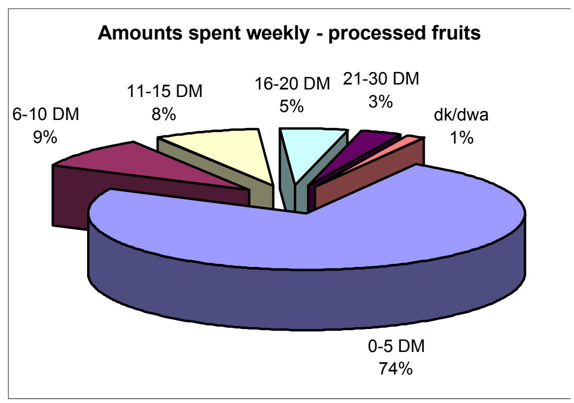
DM/Week	*Fresh fruits*		*Processed fruits*		*Fresh vegetables*		*Processed veg.*	
	Mean	*SD*	*Mean*	*SD*	*Mean*	*SD*	*Mean*	*SD*
ALL	19	15,4	9,4	18,5	24,3	18,5	6,9	9
Rural	19,9	16,6	8,9	9,4	25,4	19,25	7,3	10,1
Urban	18,5	14,7	9,6	11,7	23,7	18,1	6,8	8,3
Female	18,9	15	9,5	11,7	23,6	17,8	6,8	8,4
Male	19	15,6	9,3	10,5	24,7	19	7	9,3

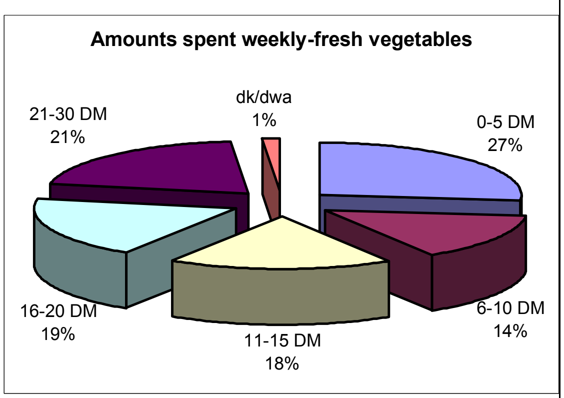
DM/Month	Fresh fruits		Processed fruits		Fresh vegetables		Processed veg.	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD
ALL	68,9	60,6	29,1	52,1	83,8	66,5	18,8	29,8
Rural	69,5	59,9	24,9	29,6	85,9	66,6	19,9	34,6
Urban	68,6	60,9	31,4	60,7	82,7	66,5	18,2	27
Female	70,8	65	31,6	64,5	83,8	67,8	17	25,5
Male	67,9	57,8	27,7	43,4	83,8	65,8	19,8	32

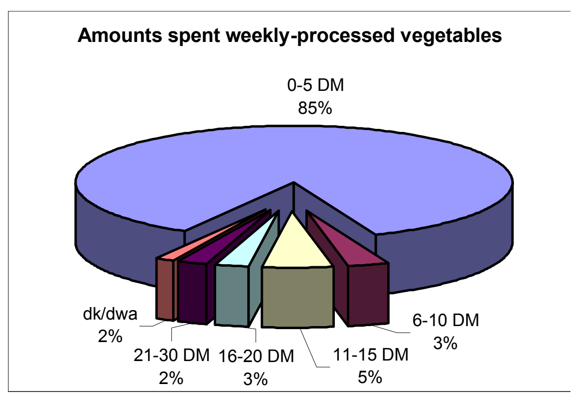
Altogether we are talking about a monthly budget for **fruits & vegetables** of about 201 DM, which is **36 % of the total food budget**. Fruits and vegetables represent just over 1/3 of the Kosovar household's average food budget. As a matter of comparison, the budget allocated to fruits and vegetables in **France** represents **16,23%** of the total food budget (*INSEE-2000*).

The share of processed fruits and vegetables in the overall consumption budget is low. And generally speaking, the rural households tend to spend less in this type of food than the urban ones. This trend is clear for the processed fruits (most probably because of a smaller availability of such items), but it is quite surprisingly reversed for the processed vegetables (is this because of the consumption of home made preserves?). See the 2 highlighted boxes in the table above.









The amount dedicated to fresh commodities, whether it is fruits or vegetables are very similar. Indeed, there is the same structure for the population spending between 6 and 20 DM a week in fresh fruits and vegetables (51% of the total).
Meanwhile, a greater share of the population

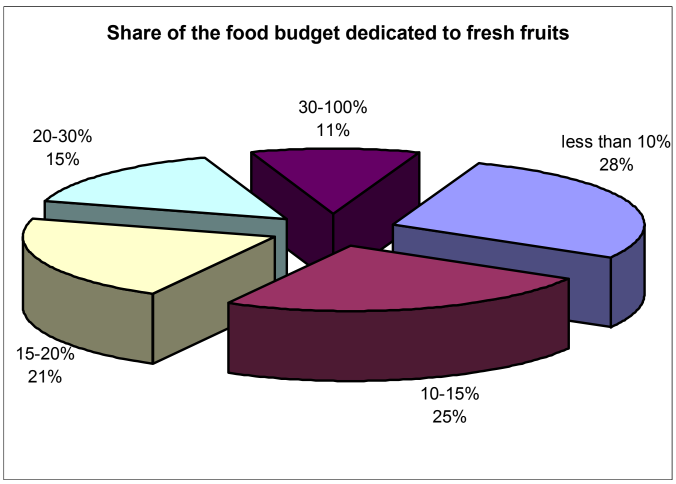
The trend identified in the above tables is then confirmed by the very small amounts of the households' budgets dedicated to the purchase of processed fruits or vegetables. Indeed, respectively 85% and 73% of the population spend less than 5 DM a week in processed vegetables and fruits.

spends less than 5 DM in fruits, and a higher share spends over 21 DM in vegetables

4.3. Monthly budget shares for fresh or processed fruits and vegetables

4.3.1. Fresh fruits and vegetables

The fresh F&V represent the core of these commodities' consumption, and the amounts dedicated to it are relatively high (compared to western European standards). Indeed, processed F&V represent less than 10% of the food budget (8,7%altogether), respectively for 72,7% and 83,2% of the total urban and rural population. We therefore made fewer comments related to the processed commodities.

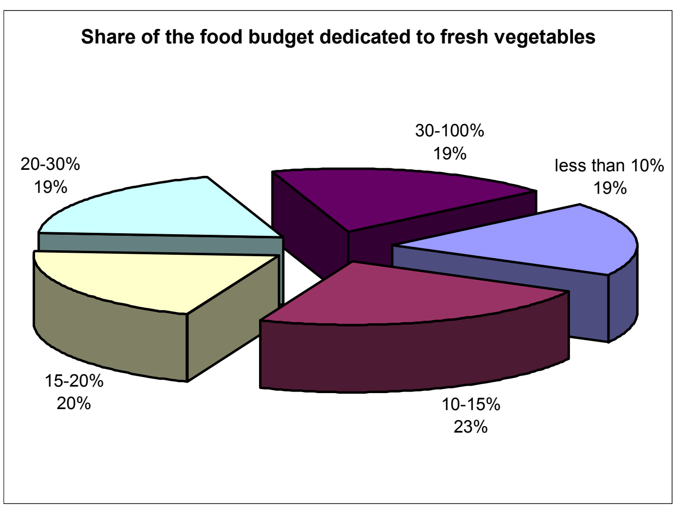


Fresh Fruits:

For 89% of the population the share of fresh fruits within their monthly food budget is less than 30%. And for 53 % it is even less than 15 %.

11% of the population spends over 30% of its food budget in fresh fruits.

Compared to western European ratios the importance of fresh fruits in terms of budget share is quite high.



Fresh vegetables:

The situation for the fresh vegetables is very much similar: for 81% of the population the share of fresh vegetables within their monthly food budget is less than 30%. Compared to fruits, there is 42% of the population dedicating less than 15% of its budget to fresh vegetables.

19% of the population spends over 30% of its food budget in fresh vegetables

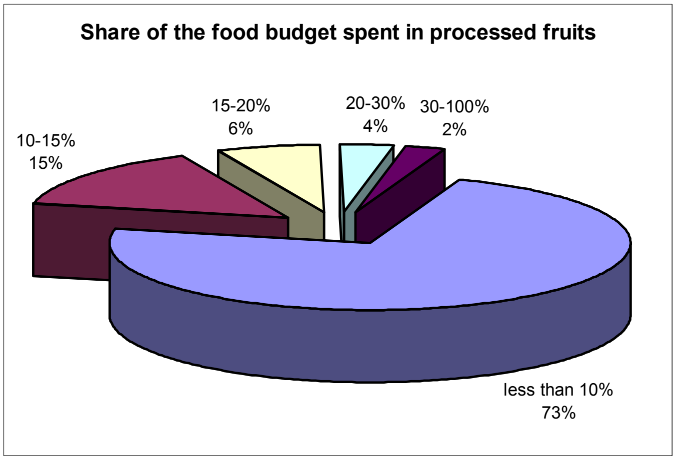
These 2 trends show that the fresh F&V represent a high share of the food budget for households in Kosovo, and this trend is even stronger for vegetables.

This might very well be because of a diet extremely centred on a few vegetables (namely tomatoes and peppers) that are largely available during summer due to the local production. When during winter this high consumption is entirely supported by imports (with higher costs).

4.3.2. Processed fruits and vegetables

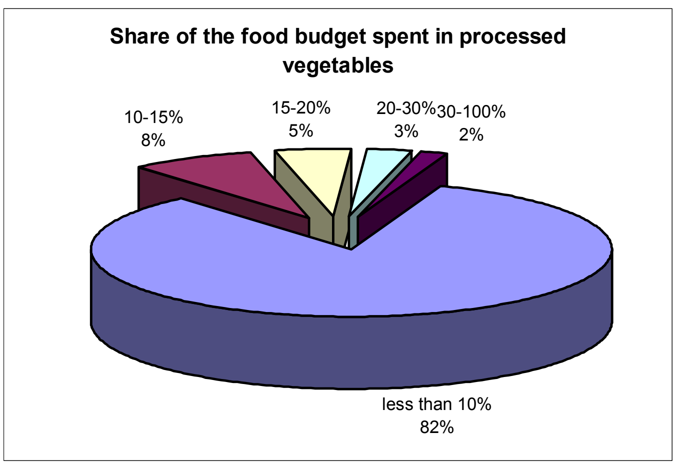
Processed fruits and vegetables represent less than 10% of the food budget (8,7 % altogether), respectively for 72,7% and 83,2% of the total urban and rural population.

As the processed fruits and vegetables generally represent a smaller share of the consumption both regarding the quantities or the amounts dedicated to it, we generally made a less detailed analysis of their consumption.



As perceived in the earlier paragraph about the amounts spent in purchasing fruits and vegetables, their small shares in the household budget are confirmed.

Indeed, respectively 73% and 82% of the population allocate less than 10% of their food budget to the purchase of processed fruits and vegetables.



- This difference might be explained by the fact that consumers take into account fruits juices as a processed fruit
- The availability of processed fruits and vegetables is relatively scarce, especially for vegetables, for which the range of processed product is extremely narrow. There is no market of frozen vegetables for instance.

4.4. Purchase frequency

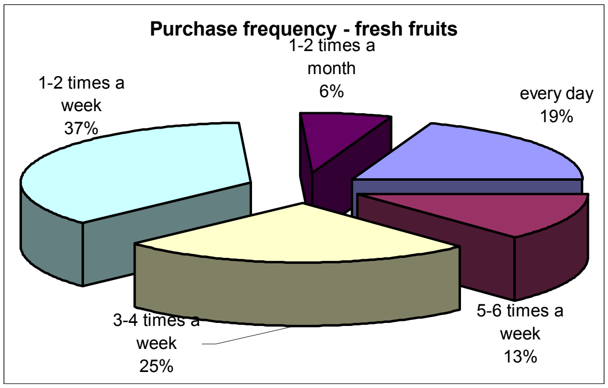
The purchase of fresh fruits and vegetables is a lot more common than the purchase of processed fruits and vegetables.

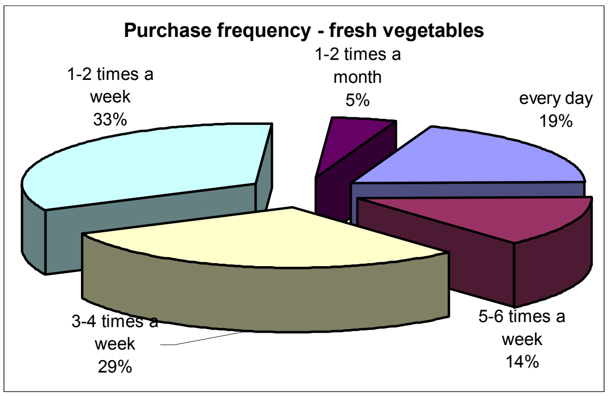
Indeed the following charts and comments clearly highlight that the purchase of processed fruits and vegetables is not frequent. We saw previously that the quantities bought of these commodities are also small.

Thus it shows that the market of processed fruits and vegetables is almost inexistent.

It might be worth assessing whether it could reveal a potential for developing a new range of products based on the assumption that Kosovo is a rapidly evolving market and therefore there could rapidly be a market for wider range of jarred or frozen vegetables.

The 4 following charts detail the frequency at which fresh or processed fruits and vegetables are purchased.





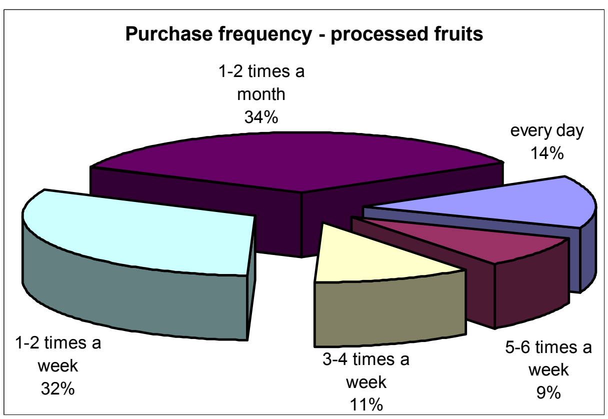
Fresh Fruits and vegetables

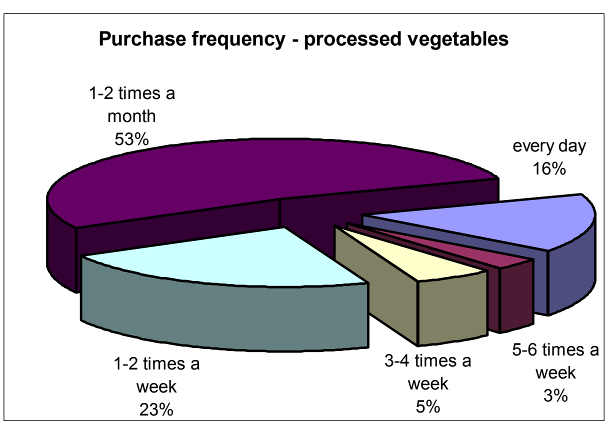
With these 2 first charts, we notice that the purchase habits for fresh fruits and vegetables are very similar.

This is not surprising as such commodities are usually bought at the same location and following identical purchasing processes.

Nevertheless, Kosovars definitely appear as big consumers of fresh fruits and vegetables as they buy these commodities often in a week: over 57% of the population buy fruits and vegetables more than 3 times a week; when 19% of the population declares buying it every day.

This shows both the importance of these items in the daily diet and possibly a certain concern about freshness.





Processed Fruits and vegetables

The difference of consumption between fresh and processed commodities is also clear.

When the consumption and therefore the purchase of fresh fruits and vegetables is clearly operated on an almost daily basis, for the processed ones, the purchase is a lot more occasional and the next § shows that it is also in rather small quantities.

In fact, it is very much likely that the market of processed fruits and vegetables is inexistent. This is strengthened by the impression that people accounted fruit juices in their fruit consumption…

This is another trend which shows that the development of commercial processing of fruits and vegetables might have to be looked at in the future.

4.5. Average quantities consumed per household per week

Once again the outcome of the study shows that the purchase of processed fruits and vegetables is completely marginal, therefore we only took into consideration the quantities of fresh fruits and vegetables consumed per week.

We also considered that when the mean for fresh fruits or vegetables consumption is below 1 Kg then it was not relevant to integrate this particular product in the analysis. Moreover, with regards to the number of respondents involved it was not possible to identify any trend.

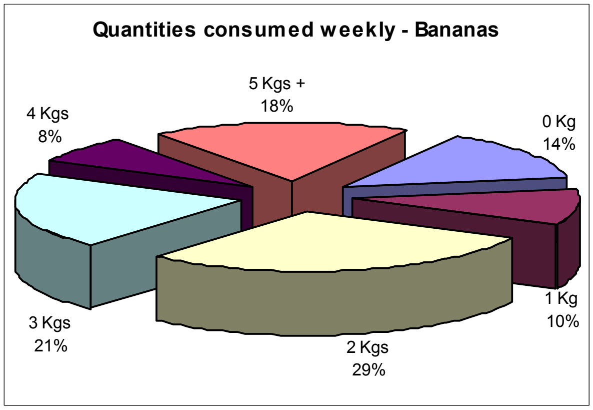
4.5.1. Quantities of fruits purchased per week

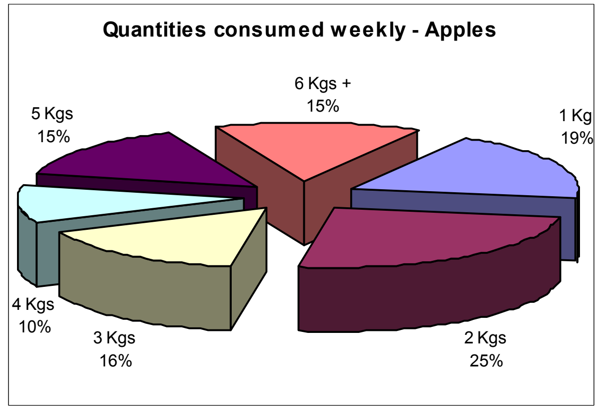
In the table below, we highlighted the 9 main fruits of the Kosovo diet, where apples and bananas constitute the 2 main commodities.

Kgs/week	Fruits fresh		Fruits processed	
	Mean	*SD*	*Mean*	*SD*
Pineapple	0,2	0,6	0	0,3
Bananas	2,5	1,6	0,4	1
Peach	1,4	1,5	0,8	1,5
Grapes	1,1	1,5	0,3	0,8
Apples	3,2	1,8	0,6	1,2
Strawberries	1,3	1,3	0,5	1,2
Apricots	0,5	1	0,3	0,8
Kiwi	0,6	1	0,1	0,5
Pears	0,8	0,9	0,4	1
Lemon	0,7	0,6	0,1	0,4
Watermelon	1	1,5	0	0,5
Mandarins	1,1	1,4	0,1	0,5
Oranges	1,3	1,4	0,3	0,9
Pomegranate	0,2	0,6	0	0,3
Plums	0,7	1,1	0,3	0,8
Cherries	1,1	1,3	0,3	0,8
Sour cherries	0,7	1,1	0,3	0,9

For all the following charts describing quantities, the category 0 Kg means between 0 and 0,99 Kgs. In fact, here are identified the very small consumers. This category has a mean of roughly 0,5 Kgs. Whereas 1 Kg means between 1 and 1,99 Kgs.

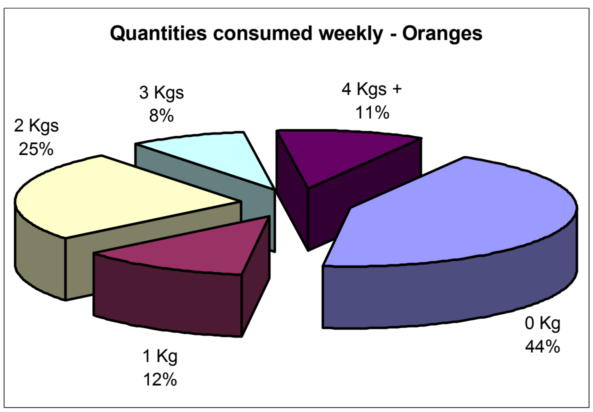
Among all the fruits and vegetables mentioned in the study, we clustered the nine more important of them (highlighted in the previous table) in 3 groups. For each of these groups we tried to identify some key characteristics of the consumption patterns.

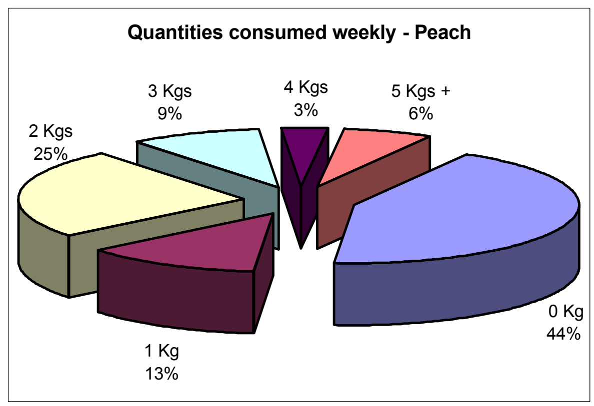


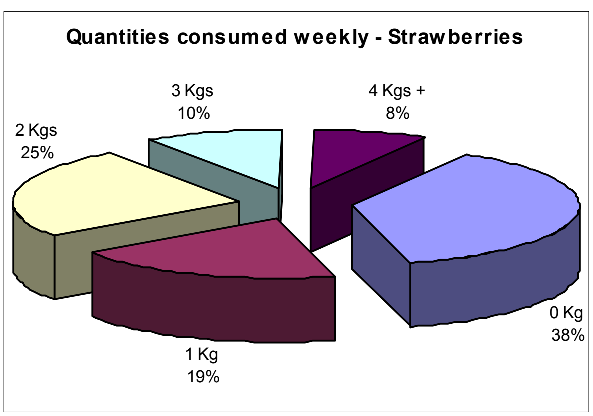


This first group constituted of bananas and apples represents the 2 main fruits consumed in Kosovo. The share of the population consuming less than 2 Kgs of each of these fruits is fairly marginal and rating less than 25%: respectively 24 % for bananas and 19 % for apples.

Obviously bananas have been appreciated for their nutritious capacity (especially in an immediate post-war context), whereas apples are the traditional fruit by essence: there was a wide range of varieties grown in southwestern Kosovo, and the number of hectares of apple orchard was tremendous before the nineties.





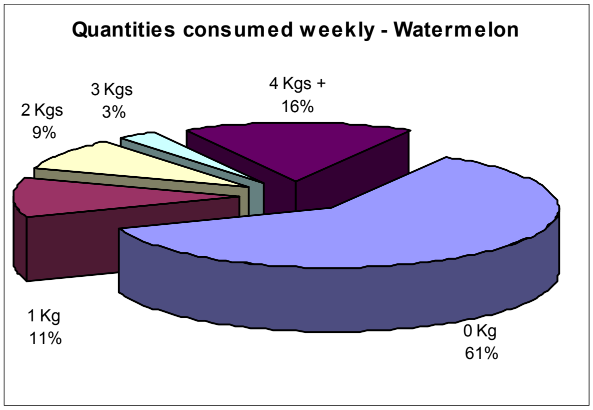


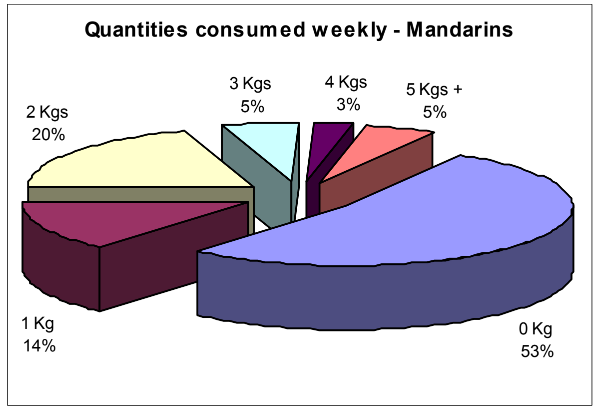
This second group is characterised by a fairly high share of the population (between 38% and 44%) consuming less than 1 Kg per week. But at the same time, for the rest of the population, the weekly consumption raises between 1 and 2 Kgs (for around 40% of the population).

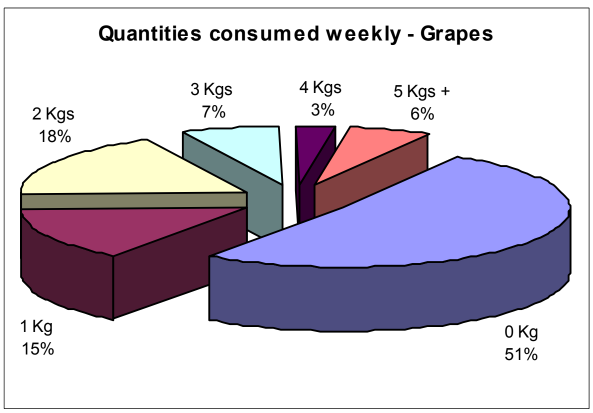
The third group below gathers the fruits consumed in significant quantities by less than the half of the population and for which the quantities consumed tend to be lower.

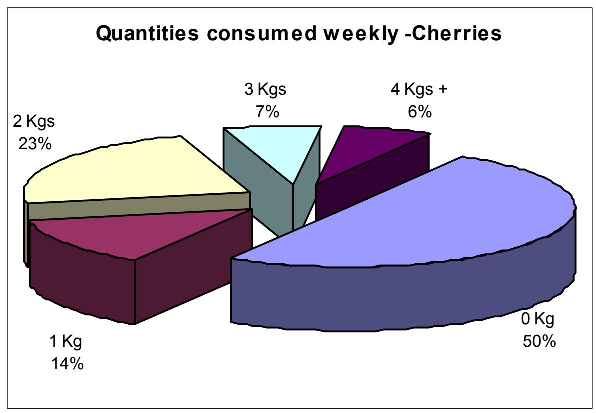
Remark the structure of the watermelon consumption is quite surprising, as during the season, the consumption is very high. There might be a bias due to the fact that the questionnaires have been administrated out of the peak season.

Indeed, during the peak production period, watermelon becomes a central element of the summer diet and there is no doubt that these figures would enhance.









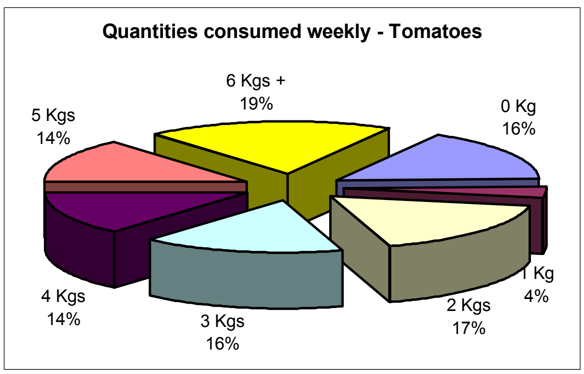
4.5.2. Quantities of vegetables purchased per week

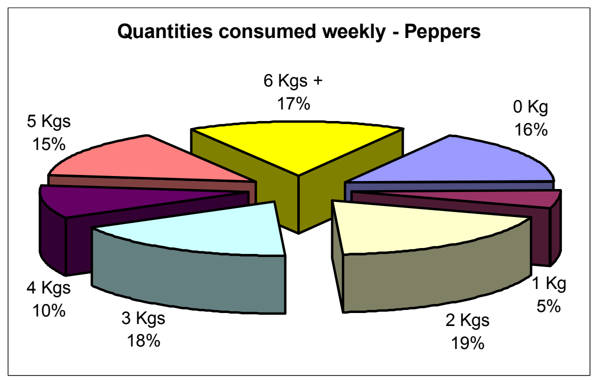
The same methodology as earlier is applied, meaning that we analyse only the vegetables for which the average consumption per household per week is over 1 Kg.

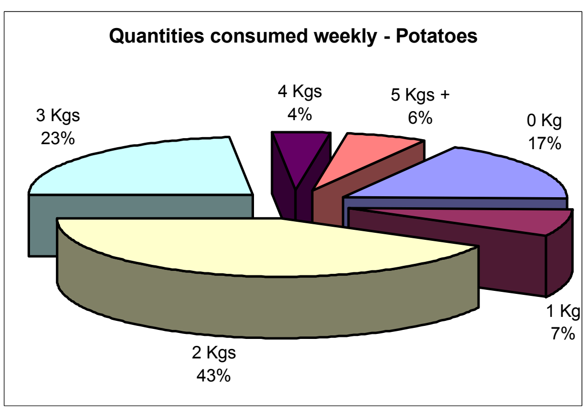
Kgs/week	*Vegetables fresh*		*Vegetables processed*	
	Mean	*SD*	*Mean*	*SD*
String Bean	0,2	0,6	0,1	0,6
Celery	0,1	0,3	0	0
Garlic	0,3	0,5	0	0,1
Mushrooms	0,2	0,5	0,1	0,5
Beans	1,7	1,3	0,1	0,3
Peas	0,4	0,8	0,1	0,3
Cucumber	2	1,5	0,2	0,6
Potatoes	2,1	1,3	0,2	0,7

Kgs/week	Vegetables fresh		Vegetables processed	
	Mean	SD	Mean	SD
Corn	0,4	1	0,2	0,7
Cabbage	1,8	1,4	0,1	0,4
Onions	1,1	1,1	0	0,3
Carrots	0,7	1	0	0,2
Peppers	3,5	2,8	0,2	0,7
Tomatoes	3,7	2,8	0,2	0,6
Eggplant	0,8	1,4	0,1	0,4
Parsley	0,3	0,8	0	0,2
Leek	0,6	1	0	0,2
Salad	0,5	0,8	0	0,2
Zucchini	0,3	0,8	0	0,1
Pumpkin	0,4	0,7	0	0,1
Spinach	1,1	1	0,1	0,4

Following these results, we then worked with 8 vegetables clustered in 3 groups. The first group is composed of tomatoes, peppers, and potatoes. Then we have cucumbers, beans and cabbage. And finally spinach and onions.







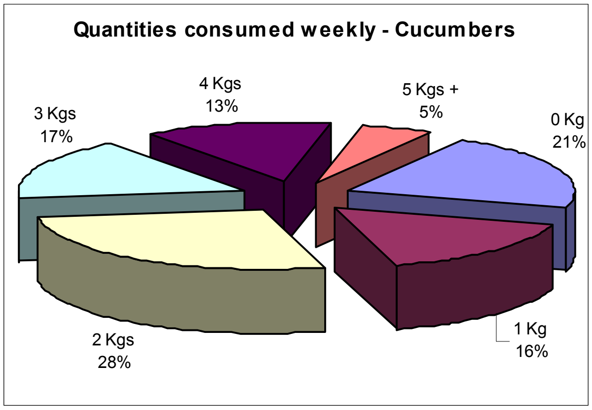
Tomatoes and peppers are definitely the most emblematic commodities of the fresh vegetables consumption in Kosovo.

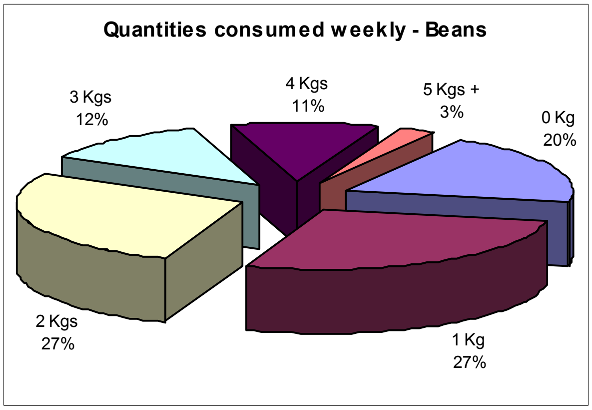
Indeed, although most of the population is concentrated on a consumption of 2 to 5 Kgs per week, there is still about 20 % (respectively 19% and 17%) of the population consuming over 5 Kgs a week.

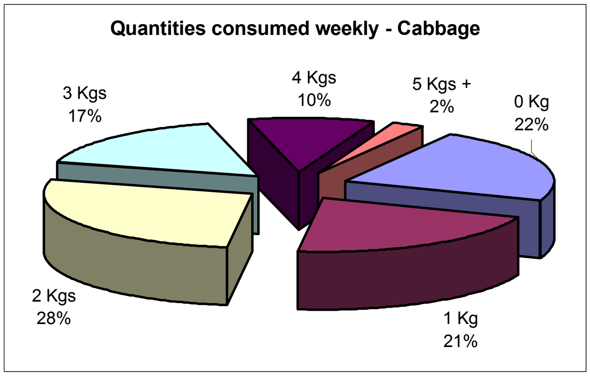
The main characteristic of this group lies in the high volumes consumed by a very large proportion of the population

As far as potato is concerned, the structure of the consumption also reveals that it is a core element of the traditional diet, but at a smaller extent. Indeed the population using small quantities of this vegetable is low: only 17%, when 2/3 declare using between 2 and 3 Kgs a week (66%).

- These 3 vegetables are definitively the "heavyweights" of the vegetables consumption in Kosovo







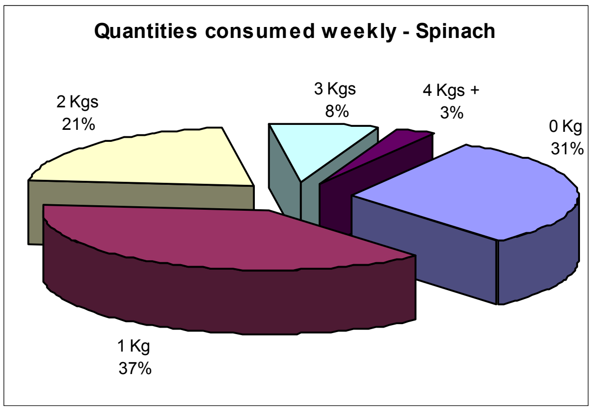
Cucumbers, beans and cabbages are in between the above described “heavyweights” group, and the following group.

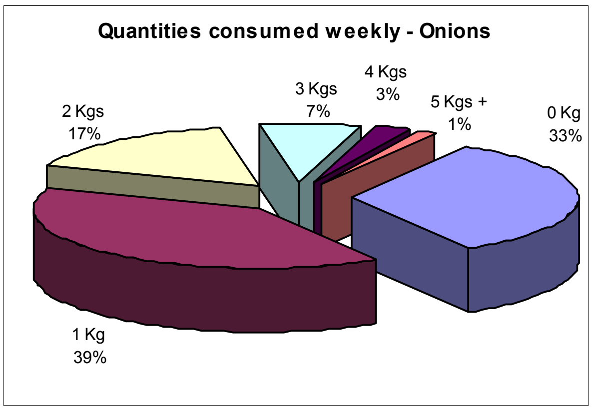
Their main characteristic is to be a major component of the traditional diet, consumed in important quantities but not as much as for tomatoes, peppers or potatoes.

They are in fact the second most important vegetables in terms of quantities consumed.

They could be qualified as the “medium weights”.

The third group next page gathers 2 traditional vegetables, widely used in Kosovo but in far smaller quantities than the vegetables of the 2 previous groups. Indeed a vast majority buys less than 2 Kgs per week of spinach and onions. These are very seasonal products (spinach) or rather used as part of dressing with the ones of the first group (onions).





4.6. Processed fruits and vegetables: preference for canning

We asked the following question to the interviewees: For the fruits and vegetables you usually consume, what is the % you buy fresh and what is the % you buy processed.

As we have seen earlier most of the fruits and vegetables consumed are bought fresh. But it is still interesting to see that for some of these commodities, there is a significant part of the population (above 25%) that declares consuming above 51% of these fruits and vegetables processed. These are:

- Peaches, grapes, strawberries, pears, oranges, cherries and bananas (we assume that some consumers took in consideration the fruits they consume in fruits juices);
- Cabbage and eggplants.

On the other hand, there are some commodities that are exclusively consumed fresh by a very large majority of the population:

- Watermelons and apples;
- Beans, cucumbers, potatoes, onions, tomatoes, peppers, spinach (here we think that the consumption of processed tomatoes and peppers is highly underestimated).

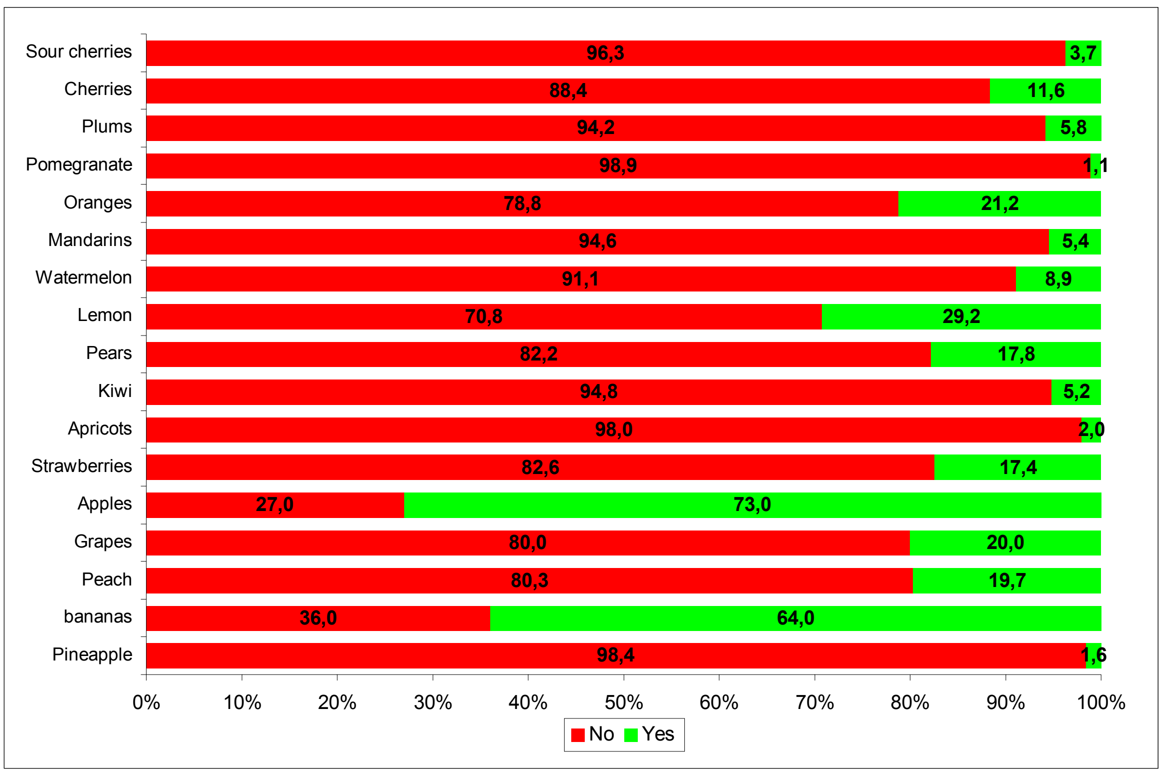
Then the interviewees were asked to indicate the type of processing they prefer. It appears that the most preferred processing for fruits and vegetables is **canning**. Then a few respondents mention jarring. But freezing and drying are completely ignored.

4.7. Which fruits and vegetables have the priority under limited budget conditions?

The interviewees were asked the question: “Would you buy this product under limited budget conditions?”

Then on the charts, the greener the rows, the larger the population for which the particular commodity is a priority, and vice versa.

4.7.1. Fruits



- With this question we really tried to identify the most important fruits in the traditional Kosovar diet. Quite surprisingly, banana is really close to apple, which is from far than the others the most popular fruit in Kosovo.
- At a second degree, we have peach, grape, strawberries, pears, lemon and oranges, which represent a priority for about 20 % of the population.
- The market potential for bananas and apples is considerable. Unfortunately the production of bananas is impossible under Kosovo's latitude.
- But the potential of apple production and therefore the relevance of supporting the rehabilitation of apple production is really high. Especially if we manage to re-establish some of the traditional varieties that were appreciated in the area. (This is actually one of the aims of the SPHP-K by supporting the re-establishment of an efficient nursery sector).

4.7.2. Vegetables

- Not surprisingly at all, peppers and tomatoes are given the very first priority in the consumption. And this is confirmed every day by field observation from July to September.
- Potatoes also occupies a very important place in the vegetable budget, and we will see below that if its consumption varies it is firstly because of its unavailability off-season, and not necessarily because of its higher price.
- Beans are also important, and we will see below that their consumption does not vary throughout the year, probably because they are kept dried.
- To a lesser extent we then have cabbage, onions and spinach that are given a lower priority. These are rather autumn vegetables and their importance might have been underestimated at the time of the study.

4.8. Consumption variations regarding the season, and reasons for these variations

4.8.1. Fruits

As far as the fruits are concerned, the consumption does not really vary from a season to another. Indeed, the fruit's consumptions that are reported to vary the most depending on the season are **Grapes** (for 43,2 % of the sample) followed by **Strawberries** (30,7%), **Cherries** (30,1%), **Watermelon** (29,9%), **Apples** (28,3%) and **Peach** (26,1%).

These are the fruits produced in Kosovo during summer and early autumn. In fact there is currently only grapes and watermelon that are locally produced at a large scale. Strawberries are scarcely grown (mainly in backyard gardens). Peaches are mainly imported but only during summer and early autumn, when apples come into Kosovo all the year round.

The above figures are quite surprising in itself as apart apples that can be available on the Kosovo markets throughout the whole year (thanks to imports), all the other commodities are still seasonal products and are definitively not available on the markets during winter. Then how comes that 70% of the population declares their consumption of watermelon staying steady all the year through, although this is impossible? This is strengthened by the fact that, for all these fruits the non-availability on the markets is ranked at the very top of the reasons evocated.

The other fruits' consumptions do not vary significantly. This could come out of 2 reasons:

- These are commodities consumed in very small quantity amongst the Kosovar population, therefore it was not possible to track the variation in their consumption;
- Some of these products are not produced in Kosovo, even during the better climatic period, and therefore they come from other producing countries that have all the year round production capacities.

The main reasons mentioned as a cause of variations in the consumption are **PRICE** and **UNAVAILABITIY** on the markets. And in fact it clearly appears that for the imported fruits that cannot be grown in Kosovo, then the variation is very much a matter of price. For the more traditional fruits available in Kosovo, then the reason evocated is more a matter of availability: when it is off-season, then these fruits are not available on the market.

➔ Therefore it shows that early or late production of protected crops would certainly find a market, as long as they remain in a price range that is not prohibitive. This is especially true for **strawberries**.

4.8.2. Vegetables

For the vegetables we observed more or less the same trends. The pepper consumption is the one that is varying the most regarding the season (54,1% of the population reported a variable consumption depending on the season). Then we have tomatoes (51%) and cucumbers (32,1%). Finally Cabbage (19,7%) and spinach (15,1%) also vary but less significantly.

The reasons mentioned for these variations are in priority the **PRICE for cucumber, pepper and tomatoes**, whereas for **potatoes, spinach and cabbage** the very first reason is the **UNAVILABILITY** during off-season periods.

These 6 vegetables actually constitute the core of the Kosovar diet, and therefore this is why their consumption is fairly sensitive to the seasonal changes, either in terms of availability or prices. And it highlights that the consumption is still very much related to the local production period.

➔ In fact there is a real potential to develop these production off-season, as long as the price competes with the vegetables imported from neighbouring countries (Greece and Turkey, mainly during winter).

For both fruits and vegetables, price and availability are 2 factors highly correlated as it is now possible to have tomatoes and peppers all the year through, thanks to import, but then it makes these products more expensive during off season periods. Moreover, due to the extreme narrowness of the range of products composing the traditional diet, the consumers have no choice but to cope with the prices increase during off season periods.

4.9. Maximum prices acceptable by the consumers

We asked the interviewees to tell us what are the maximum prices they are ready to pay for each of the fruits or vegetables they usually buy, and also for the ones they buy less often.

For the less known fruits and vegetables the figures have to be looked at carefully as the sample we are looking at is fairly small. But it still reveals the price this small share of the population would be ready to pay.

4.9.1. Fruits

DM/Kg	*IN SEASON*				*OFF SEASON*			
	Maximum price		*Reasonable price*		*Maximum price*		*Reasonable price*	
	Mean	*SD*	*Mean*	*SD*	*Mean*	*SD*	*Mean*	*SD*
Pineapple	2,7	1,4	1,9	0,8	2,8	0,6	2,3	0,8
Bananas	1,8	0,6	1,1	0,3	2,1	0,6	1,5	0,4
Peach	2	0,7	1,3	0,5	2,3	0,6	1,6	0,4
Grapes	1,9	0,7	1,2	0,3	2	0,8	1,4	0,9
Apples	1,6	0,7	1	0,4	1,9	0,7	1,2	0,5
Strawberries	2,3	0,7	1,5	0,5	3	0,9	1,9	0,8
Apricots	1,7	0,4	1,1	0,3	2,5	0,5	1,6	0,4
Kiwi	2	0,8	1,6	0,6	2,7	1,2	1,8	0,6
Pears	1,9	0,7	1,1	0,5	2,1	0,8	1,4	0,6
Lemon	1,8	0,6	1,2	0,4	2	0,7	1,4	0,4
Watermelon	1,6	0,9	0,8	0,4	2,2	0,8	1,4	0,6
Mandarins	2,2	0,6	1,2	0,2	2,5	0,5	1,6	0,4
Oranges	1,9	0,7	1,3	0,4	2,1	1	1,5	0,4
Pomegranate	1,5	0,8	0,9	0,4	2,3	0,9	1,4	0,4
Plums	1,8	0,5	0,9	0,3	2,1	1	1,4	0,4
Cherries	2	0,7	1	0,2	2,4	1,1	1,4	0,6
Sour cherries	1,9	0,8	1,1	0,5	2,3	1,1	1,6	0,6

➔ Strawberry is the fruit, which can be produced locally, that rates at the highest position in terms of maximum and reasonable prices, both in season and off-season. This highlight the interest of re-establishing strawberry production in Kosovo with a production period as extended as possible.

➔ Watermelon is amongst the cheapest fruits in season, but the consumers are ready to pay a high price if it was available off-season. Indeed, the acceptable price could increase by 75%. It would then make sense to produce watermelons that are either early or lately on the markets.

- For these 2 commodities the prices mentioned by the consumers are actually higher than the prices on the main market place in Pristina monitored during the last 6 months.

➔ For this third group composed of grapes, apples and peaches, the acceptable price increase is fairly low (respectively 17%, 20% and 23%). Formerly pears and apples were extensively produced in Kosovo, they are currently mainly imported. This resistance to price increase is surely an indicator of the potential for restarting local production: indeed consumers buy these products in large quantities, but they are not ready to pay high prices for imported ones.

➔ We compared these prices to the ones we collect through the market price monitoring we started in March 2001. They all are quite consistent with the reality:

- A reasonable price for strawberries in season would be between 1,5 and 2,3 DM/Kg. From May to July the actual retail price for strawberries varied from 1,8 DM to 2,16 DM. The consumer would then be ready to support a higher price, which is a sign that this fruit is highly appreciated and that there is a potential and a need for local production.
- Watermelons are not available off-season. But at least, for the very early season the prices announced by our interviewees are still consistent with the market reality. The retail price for watermelon on the market varied from 1,15 DM in June to 0,68 DM in July.
- Within the third group, there is only grapes that have been more expensive than what the consumers are wiling to pay. The price per Kg decreased from 6 DM in May to 3,4 DM in July.

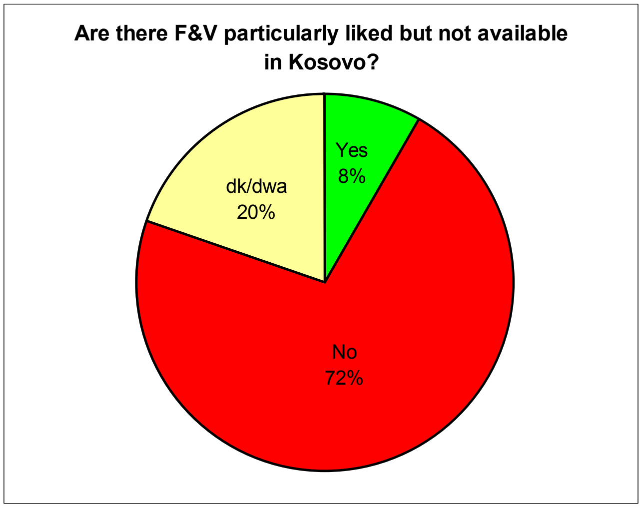
4.9.2. Vegetables

DM/Kg	*IN SEASON*				*OFF SEASON*			
	Maximum price		*Reasonable price*		*Maximum price*		*Reasonable price*	
	Mean	*SD*	*Mean*	*SD*	*Mean*	*SD*	*Mean*	*SD*
String Bean	2	0,8	1	0,6	1,7	0,9	1,2	0,9
Celery	0,2	0,3	0,2	0,3	0,5	0,7	1	0
Garlic	1,9	0,8	1,3	0,5	2,4	1	2,1	0,7
Mushrooms	3,1	1	2,5	1,3	3,8	2,1	3,1	2,1
Beans	2,7	0,8	1,8	0,5	2,9	0,9	2,3	1
Peas	1,9	0,8	1,3	0,5	2,1	0,7	1,8	0,7
Cucumber	1,7	0,8	1	0,5	2	0,8	1,3	0,5
Potatoes	1,3	0,6	1	0,5	1,4	0,5	1,2	0,5
Corn	1,4	0,5	0,8	0,3	9,5 (?)	19,9 (?)	0,9	0,2
Cabbage	1,2	0,7	0,6	0,3	1,1	0,6	0,9	0,4
Onions	1,3	0,5	1,1	0,3	1,7	0,6	1,1	0,5
Carrots	1,5	0,5	0,9	0,3	1,6	0,7	1,1	0,6
Peppers	2	1,1	1	0,3	2,2	0,5	1,5	0,4
Tomatoes	1,8	0,9	1,1	0,6	2,6	0,9	1,7	0,7
Eggplant	2,1	0,7	1	0,7	2,2	0,9	1,1	0,6
Parsley	1,4	0,8	0,7	0,3	1,5	0,6	1,1	1,1
Leek	1,4	0,5	0,8	0,3	1,1	0,9	0,7	0,2
Salad	1,5	0,9	1,2	0,8	1,8	1,1	4 (?)	12,1 (?)
Zucchini	1,3	0,5	0,8	0,3	1,7	0,8	1,2	0,2
Pumpkins	1,9	0,5	0,7	0,2	1,2	1,3	0,8	0,4
Spinach	1,6	0,7	0,9	0,2	1,5	0,6	1,2	0,5

➔ The figures with question marks are not relevant because of the fantasist declaration of a few individuals.

- ➔ We have a first group composed of garlic, tomatoes and peppers, for which the consumers are ready to accept the higher prices increase from the in season period to the off season period. The acceptable increases are respectively 61%, 55% and 50%. Not surprisingly these commodities are the core vegetables identified earlier. Further to the interest of early and late production this shows the interest of developing winter hardy varieties that could challenge the winter expensive imports.
- ➔ There is a second group composed of spinach (33% acceptable price increase), beans (27%) and mushrooms (24%). These are also some traditional vegetables but their difference lies in their Autumn/winter availability. Indeed, the maximum acceptable prices refer to a summer availability:
- ➔ Compared to the market real prices, we noticed that the price of garlic is always a lot above what the consumers are willing to pay (from 3,55 DM in May to 3,8 DM in June). For peppers and tomatoes the market and wished prices match quite well.

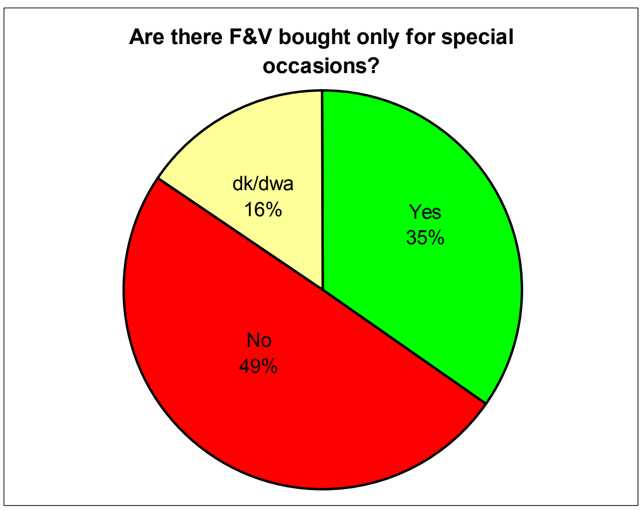
4.10. Atypical fruits and vegetables consumption: a potential for market niches?



Obviously, most of the population is happy with the offer of fruits and vegetables in Kosovo: 72% of the population do not feel that there is anything missing in Kosovo. 20% do not know, which shows that they are not missing anything special either.

For the 8% that is missing some fruits and vegetables, then it is mainly exotic products: kiwis, dates, pineapples, figs.

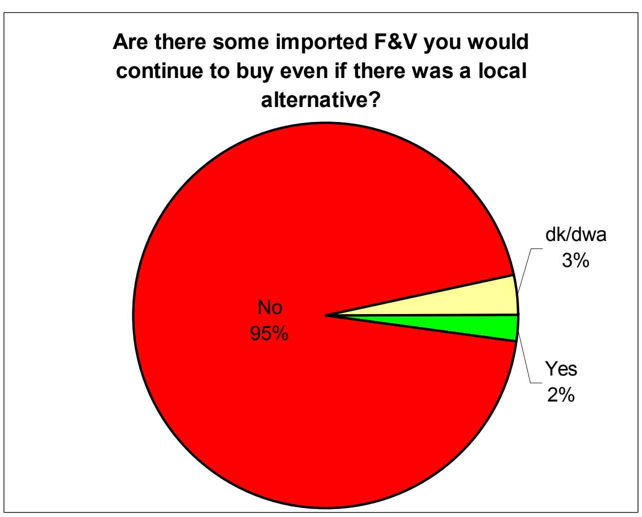
This shows a very small potential for diversifying the production and then the offer of locally grown vegetables.



35% of the population buys some specific products because of a special occasion.

Thus there is no real tradition of buying specific fruits or vegetables for special occasions. The only significant fruit mentioned by the interviewees is **banana**, which is mentioned by only 10% of the respondents.

For all the other fruits and vegetables the share of the population is far too small to be significant.

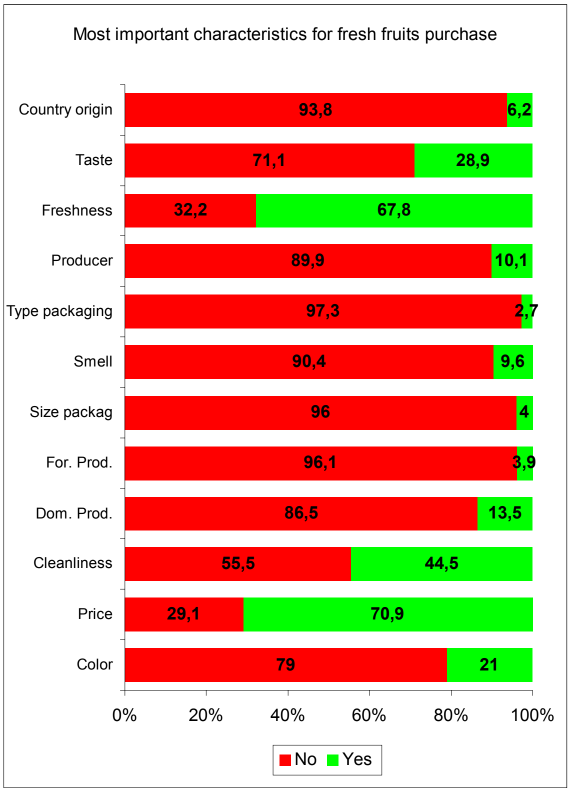


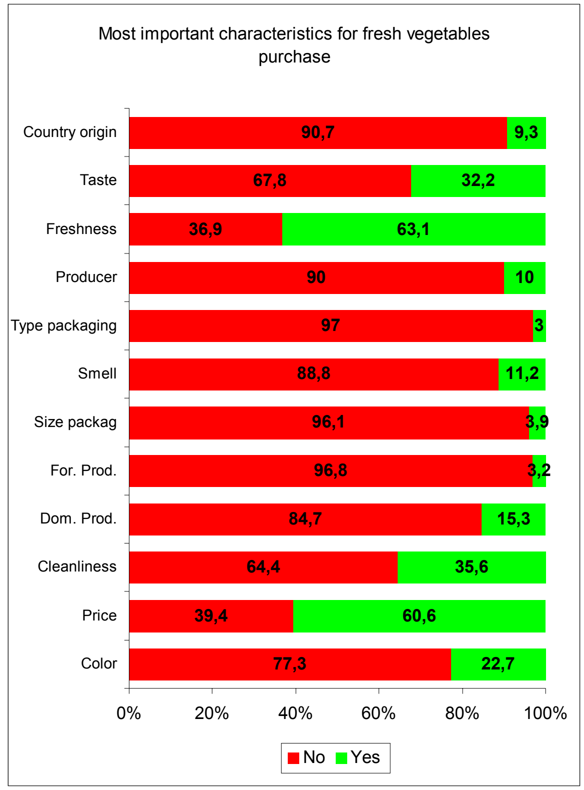
Apparently there is a fairly great opportunity to substitute some of the imported products by local ones, as long as the consumers know that this is a locally grown fruit or vegetable.

This actually confirms the need of developing awareness amongst the farmers about the market mechanisms and commercialisation strategies: advantages of labelling and advertising on the origin of the products.

5. Analysing the fruits and vegetables purchasing behaviours: what are the characteristics valued by the consumers?

5.1. What are the most important characteristics when purchasing fruits and vegetables?





The same characteristics are valued for the fruits or the vegetables purchase. The trend is just a bit stronger for the fruits.

PRICE is definitely the first characteristic considered by the very majority of consumers. On the other hand we've seen earlier that less than the half of the population reported varying its consumption of the main fruits and vegetables from the season to the off-season period (§4.8). Therefore the elasticity to the price might be important but under a limited offer, the consumers have no choice but buying expensive products off-season. This is actually the reason of their price sensitivity: coping with high prices due to a narrow range of products available (this is also strengthened by factors such as employment and economical reconstruction), therefore any small variation of the prices would definitely impact on the consumption.

FRESHNESS being the second more important characteristic, this should favour the short distribution circuits, that is when the linkages between producers and consumers are the tightest.

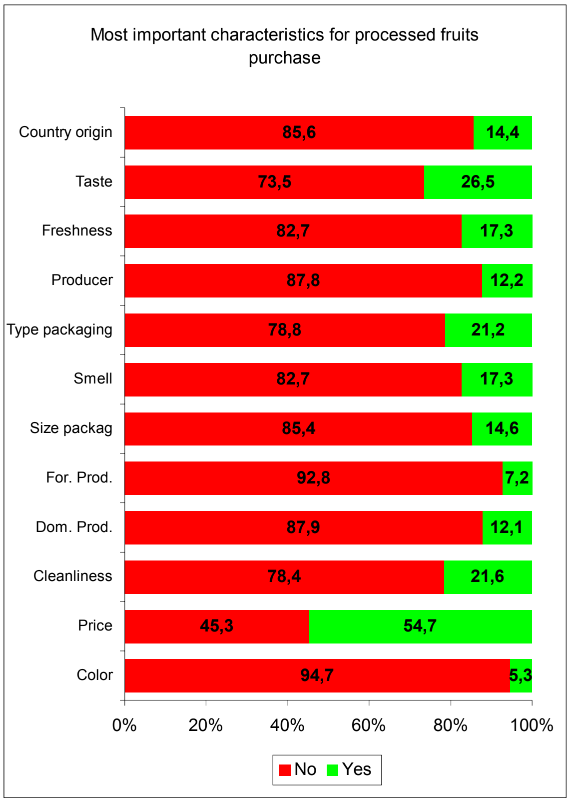
CLEANLINESS is very much related to freshness, as they are both signs of a healthy product.

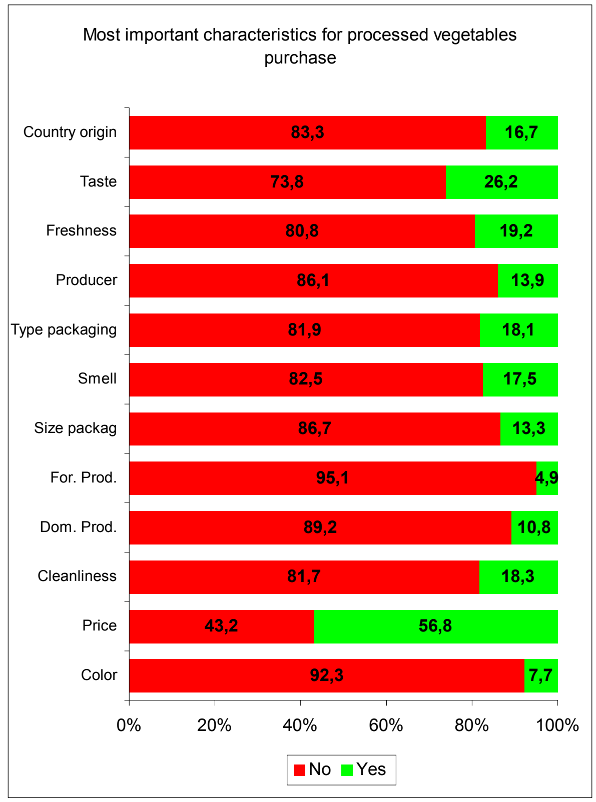
TASTE is recognized as important for 1/3 of the population. But how do people track their preferred tastes when neither the variety nor the producer are indicated. This could highlight a potential for some commercialisation improvements.

COLOR seems to be of importance only for about 20% of the population, but it is possible that color is actually used as a proxy of freshness and taste.

The **origin** of the products is not predominant. Knowing where the product comes from, whether it is a domestic or a foreign product does not represent a crucial information for the consumer. We will see later that the domestic ones might be preferred, but only if they are cheaper than imports.

All the issues about **packaging** (size, type) are not considered as important either. Both because of the total absence of any "research" about packaging, and the fairly general habit of purchasing fruits and vegetables rather in very small quantities or in bulk, but never with really caring about how these commodities are packed.



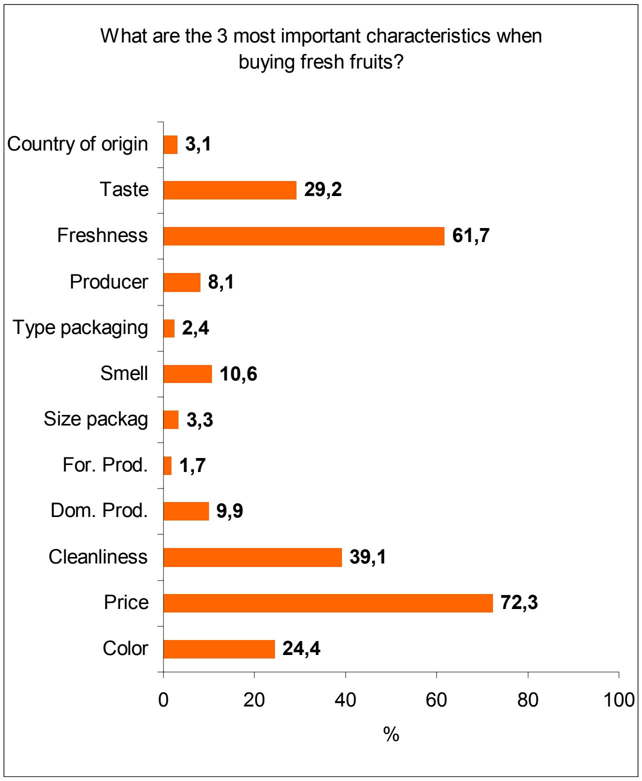


Not surprisingly, as the consumption of processed fruits and vegetables is marginal, the main characteristic taken into account by the consumers is **PRICE**.

All the other characteristics rate about the same: between 10 and 20 % with the exception of **TASTE**, which is considered as an important characteristic when purchasing processed fruits and vegetables. In this specific case, the taste can be easily identified and recognised by the consumers on the base of the brand and packaging.

5.2. The 3 most important characteristics

After asking to the interviewee what were in general the characteristics they would take into account when purchasing fruits and vegetables, we then tried to refine these declarations by asking them what would be the 3 more important ones among all the ones mentioned. Then it shows some slight differences with what preceded.



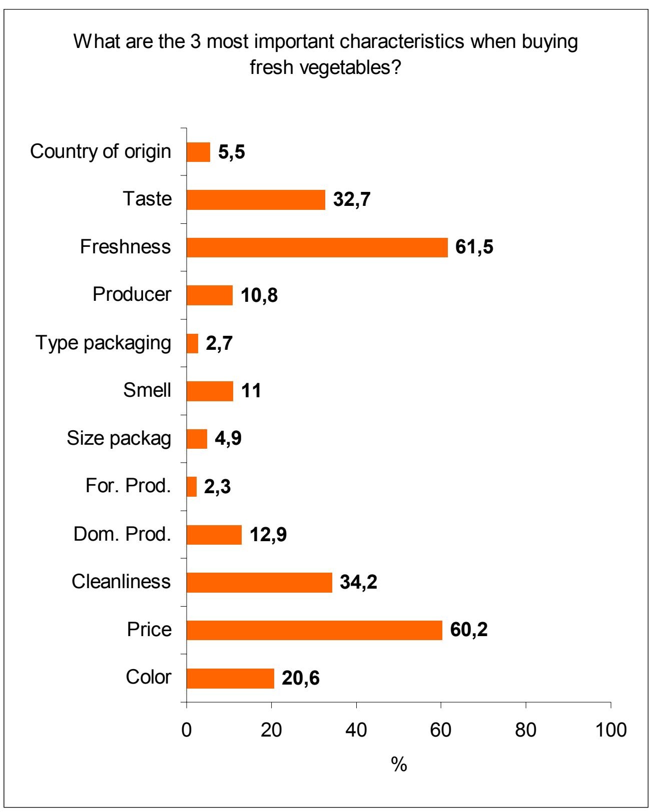
Ranking:

- **Price**
- **Freshness**
- **Cleanliness**
- **Taste**
- **Colour**

Concerning the fresh fruits, the 3 more important characteristics respect the structure highlighted below.

The interesting thing is that freshness rates almost at the same level as price. Meaning that for a significant share of the population, freshness is as much important as price.

This would lower a bit the previous comment where the price was a sort of “single criteria taken into account”. This actually opens a window for local products arriving fresh on the market.



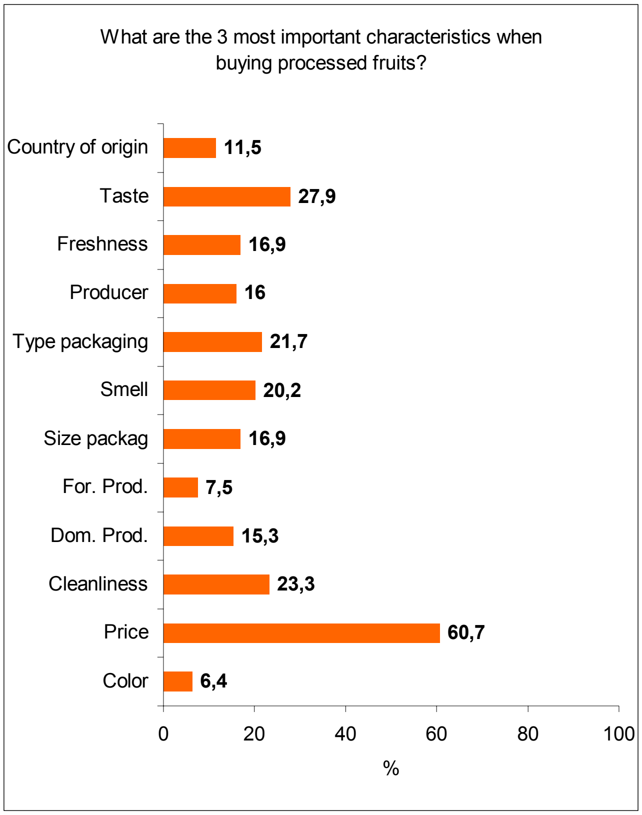
Ranking:

- **Freshness**
- **Price**
- **Cleanliness**
- **Taste**
- **Colour**

Compared with the previous situation, it appears that for the vegetables there is in fact a higher share of the population considering the freshness being more important than price which comes in the second position.

This is an interesting perspective for the local producers as freshness is one of the comparative advantages the local producers can claim.

Taste and cleanliness are confirmed as the following more important characteristics.

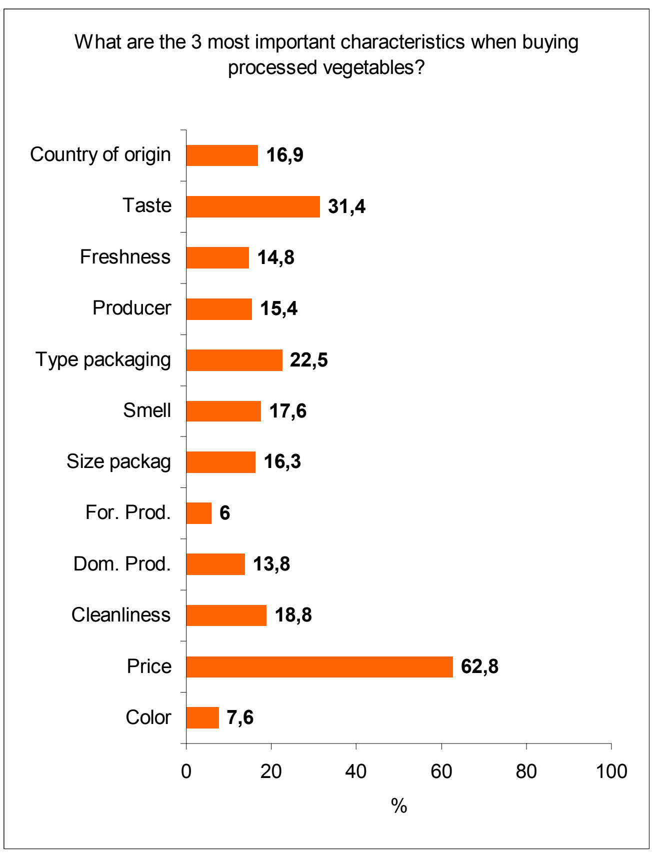


Ranking:

- **Price**
- **Taste**
- **Cleanliness**
- **Packaging**
- **Smell**

This confirms the previous findings, as the main characteristic for the purchase of processed fruits is price, and all the other characteristics are only considered by a minority of the population.

This might be linked to the fairly poor quality of the products available on the Kosovo market.



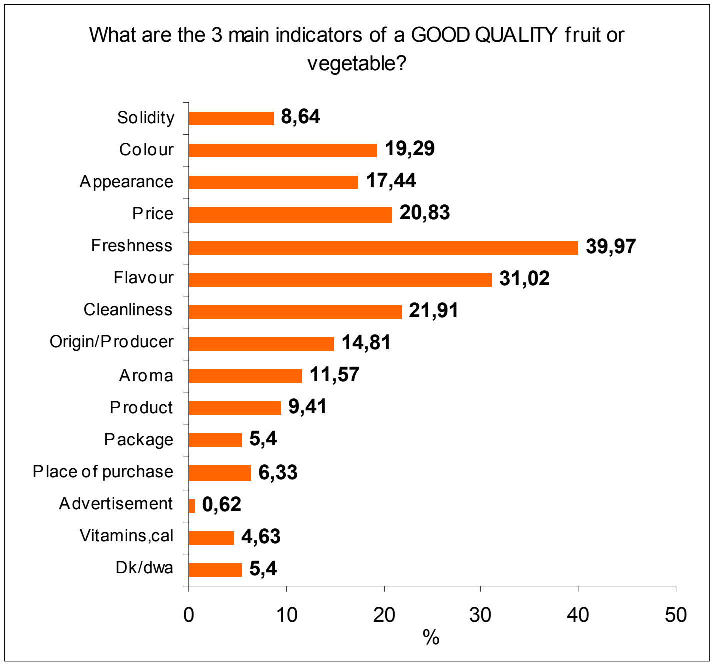
Ranking:

- **Price**
- **Taste**
- **Packaging**
- **Cleanliness**
- **Smell**

The same comment as above apply for the processed vegetables also, that is to say that the price is definitely the main and the only criteria for selecting processed vegetables.

After the taste, it is worth mentioning that the country of origin is also an important characteristic in the choice made by the consumers. This might mean that the origin of the product might be used as a proxy of quality.

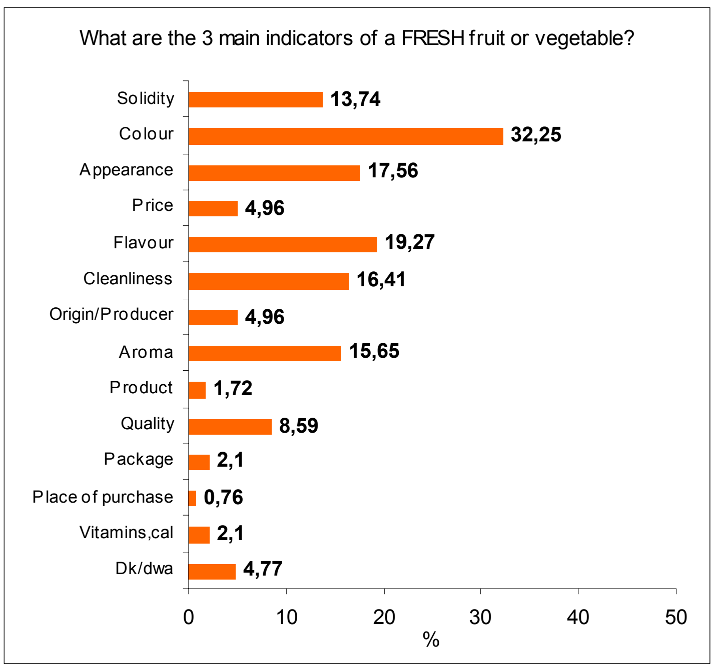
5.3. What are the 3 main indicators of a good quality product?



In Kosovo a good quality fruit or vegetable is the one that is FRESH. We will see below that freshness is actually mainly assessed through COLOUR (which also rates quite high as far as quality is concerned).

Other criteria used for assessing quality are FLAVOUR, CLEANLINESS and PRICE only comes at the 3rd place. APPEARANCE rating at the 5th place confirms that the consumers base their quality assessment on what they see and not on complementary information such as the production's area or the identification of the producer.

5.4. What are the 3 main indicators of freshness?



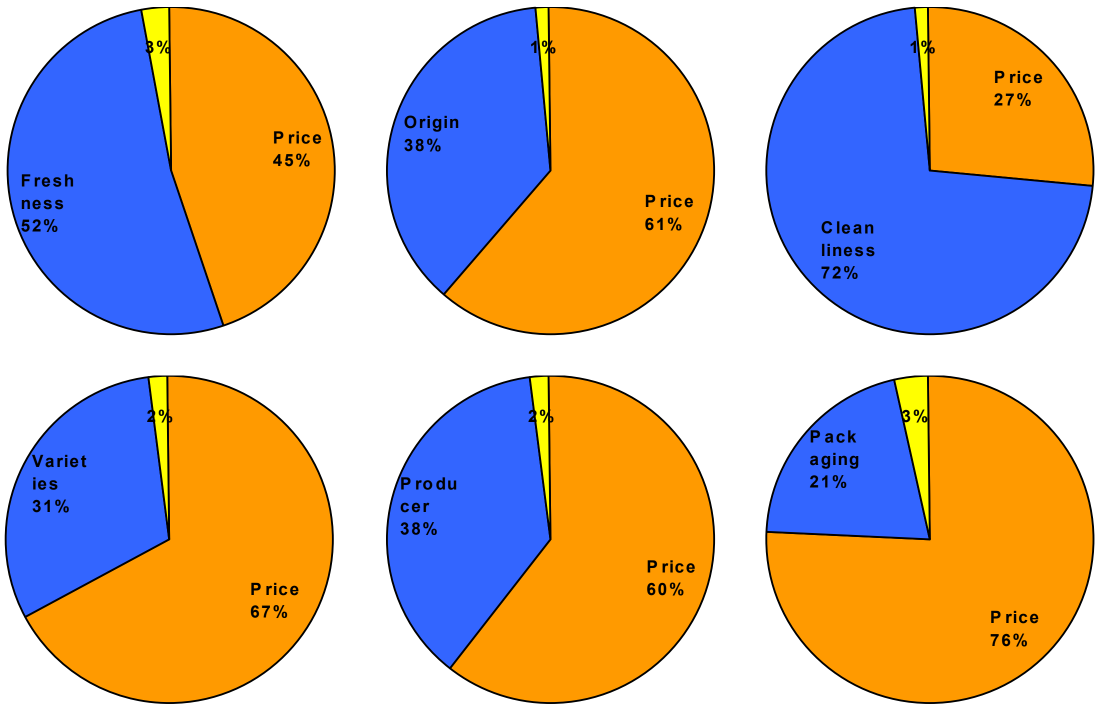
COLOUR is definitely the crucial indicator of freshness in Kosovo, followed by FLAVOUR and APPEARANCE: this is the affirmation of an "on point of sale" purchase decision, which is not related to a particular producer or brand.

This is confirmed by the importance of CLEANLINESS and AROMA.

Finally a significant part of the population considers that solidity (meaning FIRMNESS) is also a good indicator of freshness.

5.5. Comparative analysis of the main criteria for selecting fruits and vegetables

The yellow segments represent the share of the population that does not know or does not want to answer. The item “producers” refers to the identification of the producer.



PRICE vs. the other ATTRIBUTES:

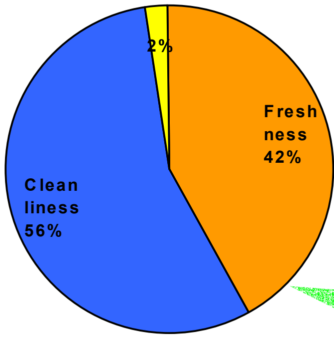
In the previous paragraphs, price, freshness and cleanliness were mentioned to be the 3 most important characteristics considered when purchasing fresh fruits and vegetables. And price was the characteristic looked at by the largest share of the population in the selection-decision process. Then by confronting each characteristic to another we discover that the importance of price might actually be lower.

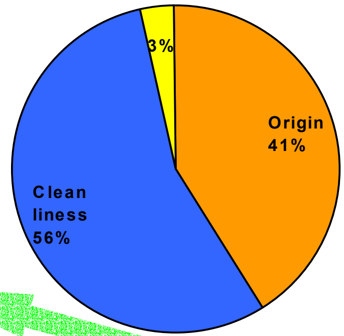
Indeed, we now have a hierarchy between these criteria where **cleanliness** is definitely the main characteristic (for 72% of the population), followed by **freshness** (52%) and then **price**. This actually lowers again the importance of price in the purchase decision.

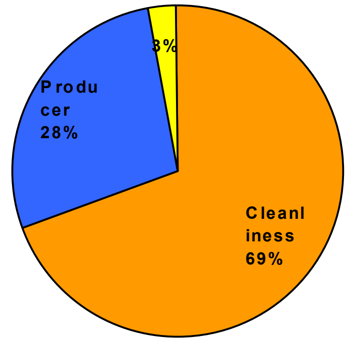
Nevertheless we see that the price is definitely the main criteria when compared to the others. The orange surface actually shows the share of the population that considers price to be more important than varieties, producers, etc.

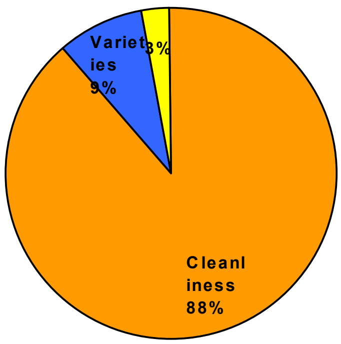
There is very little concern about the varieties and packaging. Then it seems difficult to diversify the offer on the base of related comparative advantages such as better varieties or better packaging.

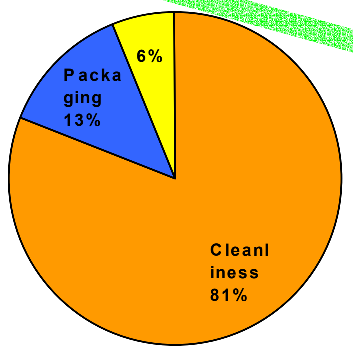
The origin (local vs. foreign) and the identification of the producers rate the same at 38%. Over a 1/3 of the population is then willing to get more information about where the products come from. We could also assume that it is a desire for knowing more about the products themselves (how and where are they produced? Are they produced organically?)







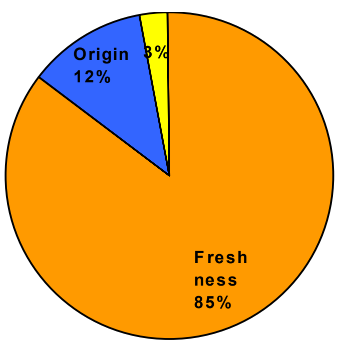


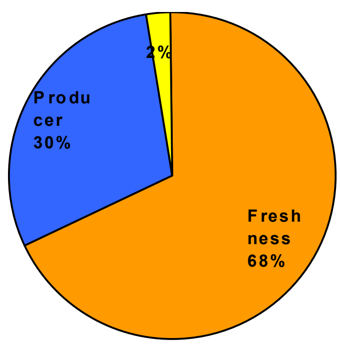


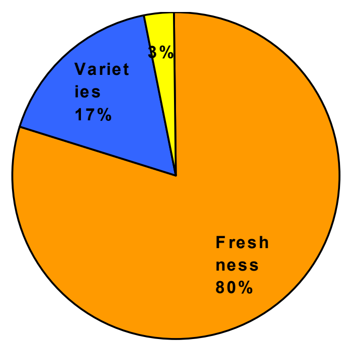
Apart price, the 2 main other characteristics mentioned by a vast majority of the population were freshness and cleanliness.

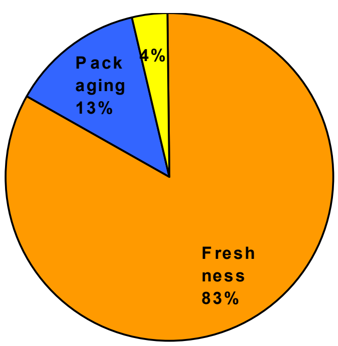
Then the first chart of this group of charts gives us the hierarchy between those 2, although it is quite close to a fifty-fifty situation!

Then for the other characteristics there is absolutely no doubt that cleanliness is the very first criteria taken into account. But the origin rates higher against cleanliness than against price.

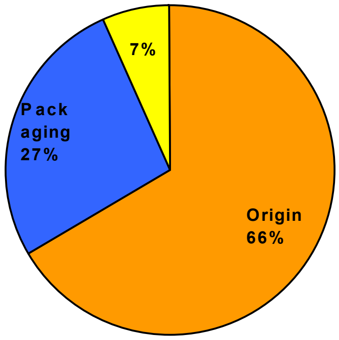


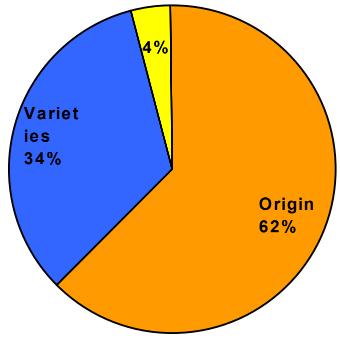


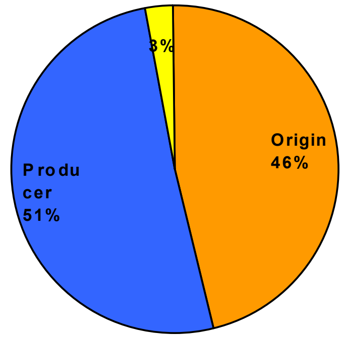




Freshness appeared to be the second main criteria in the selection process of the consumers and it is confirmed by the above results. The only criterion stronger than freshness is cleanliness, which has been identified as the very first one.

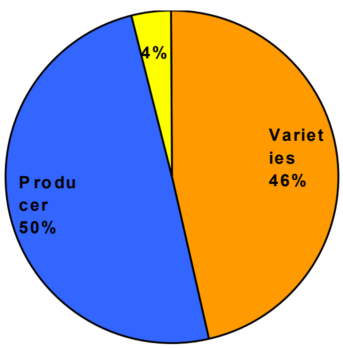


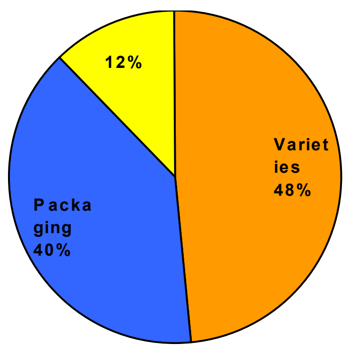




As far as origin is concerned, it does not seem to be a very important criteria compared to the 3 first ones. But it is still a lot more important than the producers, the varieties, and the packaging.

It is worth mentioning that when the packaging is evocated, then the share of the population that does not know or does not want to answer to increase. This actually shows or confirms the low interest of the consumers for the nature of the packaging used.





We have seen earlier than the knowledge of the varieties perform very little compared to the other criteria. This is confirmed here against the producers, but it is still more important than the packaging, although the rate of abstention tends to indicate that the respondents do not really take this item into account

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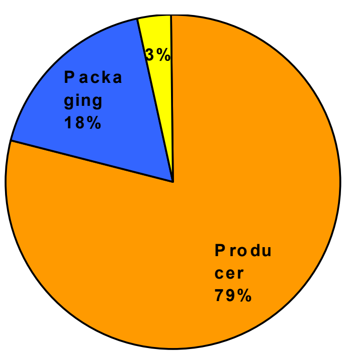


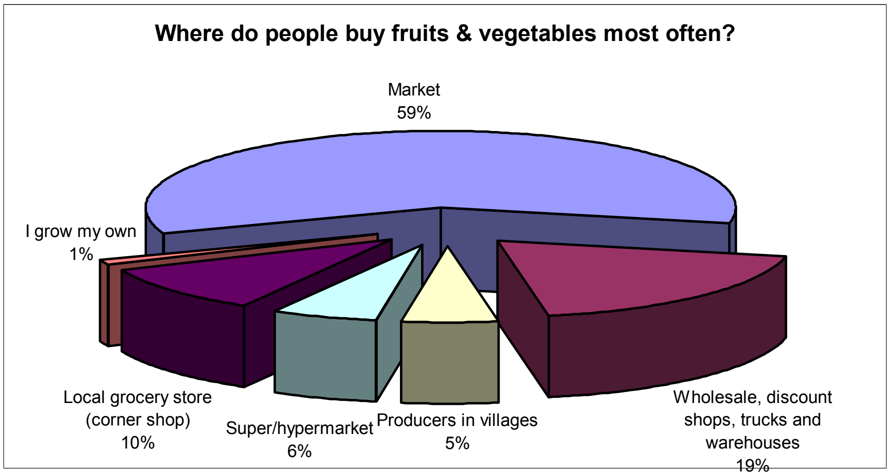
The final confrontation is between packaging and producers that are amongst the less considered items for the consumers. Then it confirms the total absence of interest of the consumers for the nature of the packaging.

Thus it seems that packaging is absolutely not a source of added value for the consumers.

The consumers do not care about the packaging but they might care about it if it was providing relevant information about the producers (and the conditions of production).

Indeed the standards for of packaging are so low that the consumers do not expect anything from it (convenience, information). This could be changed in the future if the consumers are asking for such improvements.

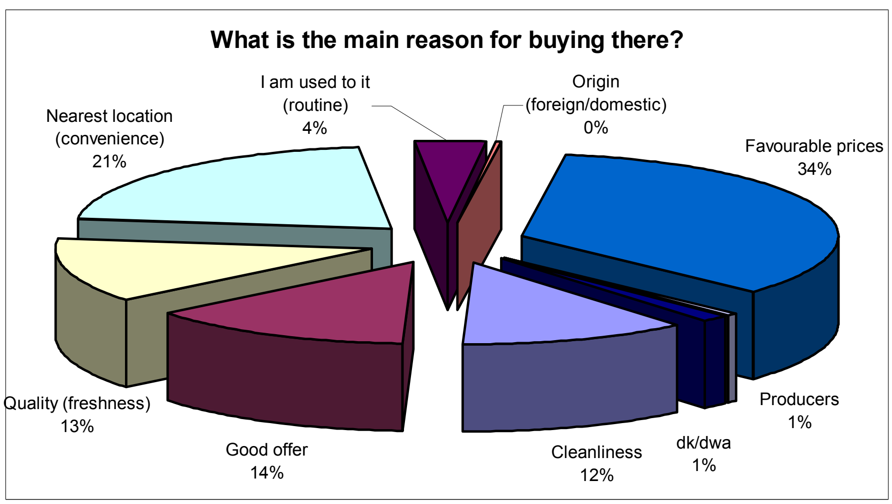
5.6. Location of purchase and reasons for selecting this location



A vast majority of the population buys its fruits and vegetables on the market, and the following chart confirms that this is because of the possibility of finding interesting prices there, but also for the quality of the products.

Then the second location mentioned by the higher share of the population is not really a location as such but rather a selling practice. Indeed, people do not refer to a precise place but rather to a type of seller: these sellers which can often be producers as well and which are not fixed somewhere in particular but rather proposing their merchandise on road side stands.

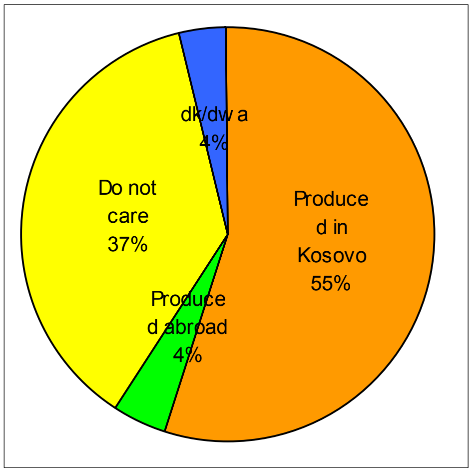
Then the corner shop are frequented by 10% of the population, when supermarkets and producers in the villages are respectively mentioned by 6 and 5% of the population. For the latter, some of them are actually included in the second category (truck and whole sales).



The price is determinant in the selection of the purchase location, but the other attributes highlighted above (quality and cleanliness especially) are mentioned by a significant share of the population also. Indeed, altogether quality, good offer and cleanliness (all describing quality) rate at 39%.

Then a new attribute scores high: the convenience. Consumers actually look for some convenient locations when they purchase fruits and vegetables, which means that they are not necessarily ready to cover "long distances" for a better quality product or a cleaner product. But we can assume that an attractive price would most likely push them to do so.

5.7. Competition between local and foreign fruits and vegetables



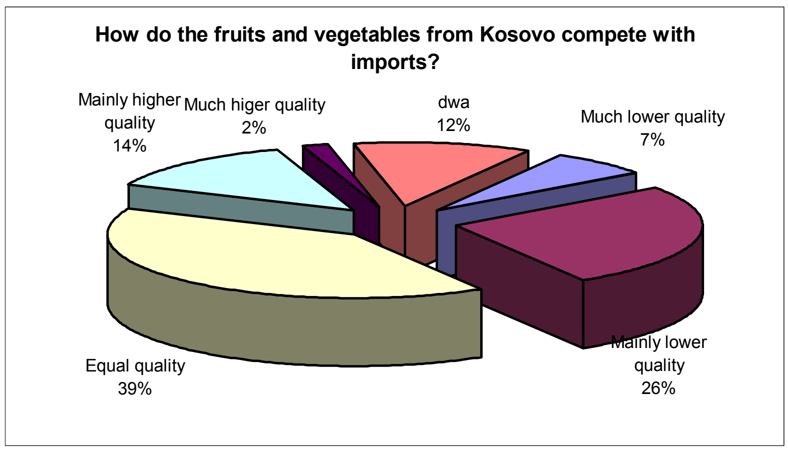
Do people prefer buying fruits and vegetables produced in Kosovo or abroad?

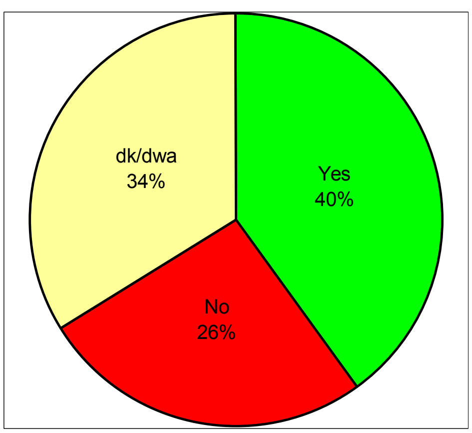
Although earlier we identified that over 90% of the population did not care about the country of origin for fresh fruits and vegetables, we now have a slightly different result: 55% of the population would rather buy vegetables and fruits produced in Kosovo. This is what we defined as a "positive nationalism": the Kosovars are willing to give the priority to the local production, as long as it still fits with the criteria they define (especially in terms of price, freshness and cleanliness).

This is another comparative advantage from which the local producers should take benefits.

The perception of the local fruits and vegetables production is not really good with **33%** of the population thinking that it is of a **lower quality**, and only **16%** thinking it is of a **higher quality.**

Then for 39% of the population it is of equal quality, this type of consumers is probably very similar to the ones that declared in the previous question not caring about the origin of the fruits and vegetables they are purchasing.



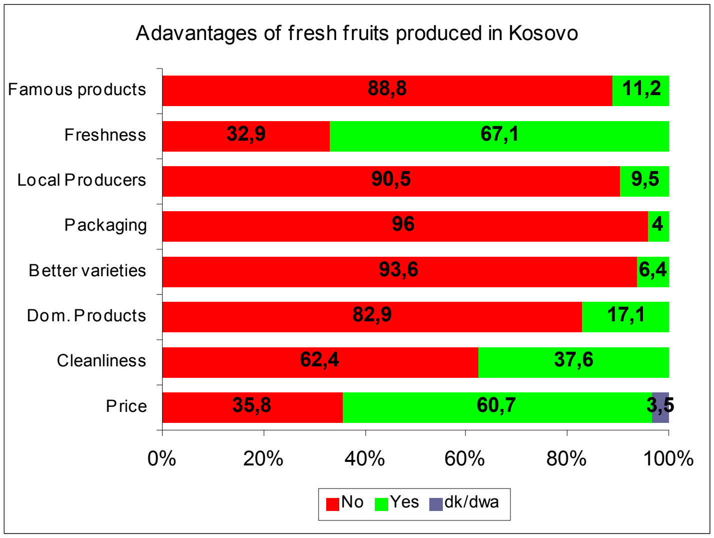


Is it easy to differentiate the domestic products from the imported ones?

We still have the same share of the population that does not care about this issue of local vs. imported products.

Then there is 26% of the population that is not able to clearly differentiate the imported products from the local ones. Which means for the producers that they definitely have to promote their products as being locally produced in order to reach the 55% of the population that is rather committed in purchasing fruits and vegetables produced in Kosovo rather than imported ones.

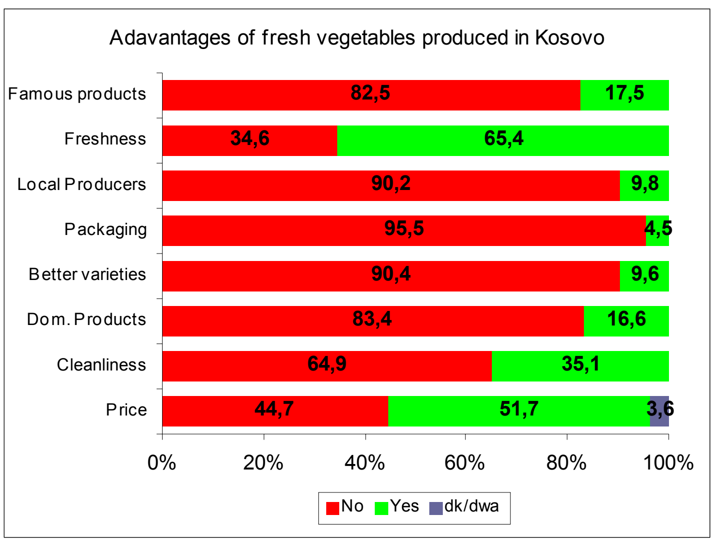
5.8. Advantages and disadvantages of fruits and vegetables produced in Kosovo



Once again the structure of the characteristics for fruits and vegetables on this issue is very similar.

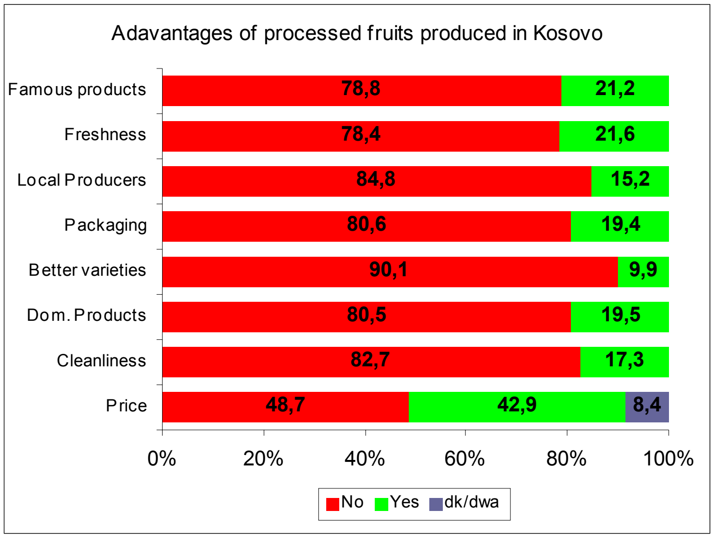
We actually find again the elements highlighted earlier in the comparison of the different characteristics, that is to say the predominance of **freshness**, closely followed by **price**.

The local products are perceived as commodities rapidly available on the market after leaving the farms and at a very attractive price.



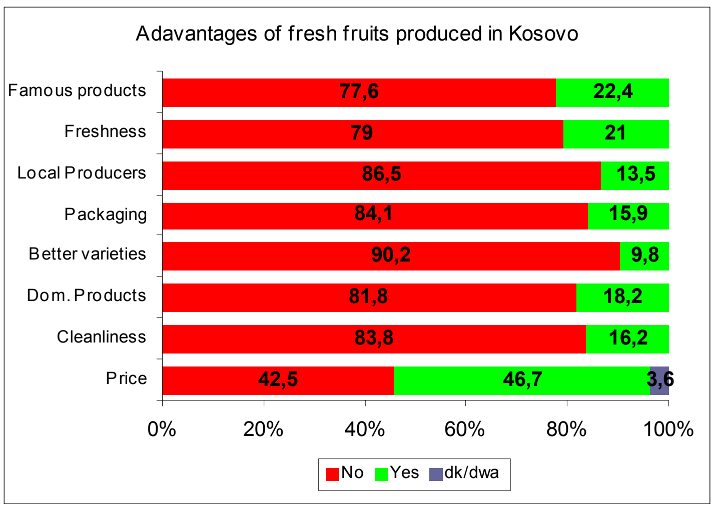
Then **Cleanliness** comes into the third position but very a very lower importance.

Surprisingly there is no declaration of the local products being of a better quality or the varieties grown in Kosovo being unique, although this is a speech frequently heard both in rural and urban areas!



For the processed fruits and vegetables, the only significant advantage of commodities made in Kosovo is price, although we notice that for the fruits, the Kosovar products have absolutely no comparative advantages for a majority of the population.

Indeed the only commonly agreed advantage could be price but in fact there is only 42,9% of the population considering that Kosovo has an interesting advantage in the fruit processing industry.



For all the other characteristics, a massive majority of consumers do not consider that the produces from Kosovo cannot have any advantage: there is just about 20% of the population convinced that local products do have some of these advantages.

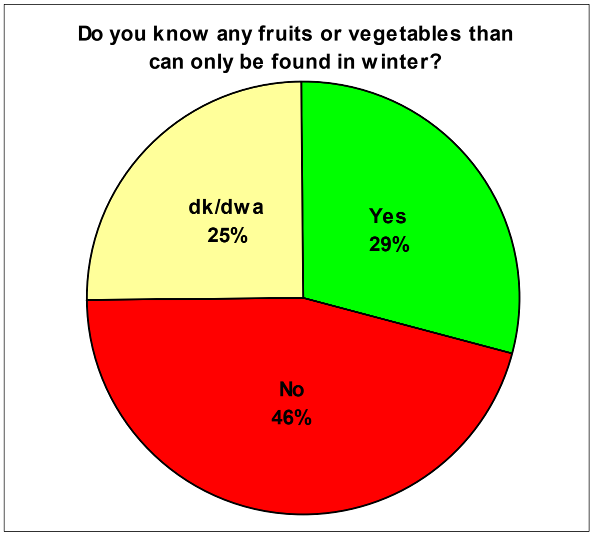
Of course these low results are related to the fact that the consumption of processed F&V is weak.

5.9. Potential of winter vegetables?

In May 2001, the SPHP-K realised a quick market survey: “assessing the market potential of winter vegetables grown in Kosovo”. The results have been published in July 2001. The methodology applied for this study was to interview a small number of wholesalers, retailers, and restaurant cooks in Pristina in order to get a rough idea about what could be the response of consumers to winter vegetables in a main urban centre.

With this study and this paragraph, we now have a comprehensive picture of this consumption for the entire population.

The idea underlying behind the promotion of winter vegetables is to lead the farmers to an “all year round production” scheme. Indeed, this would generate more employment and more income than the current summer production alone.



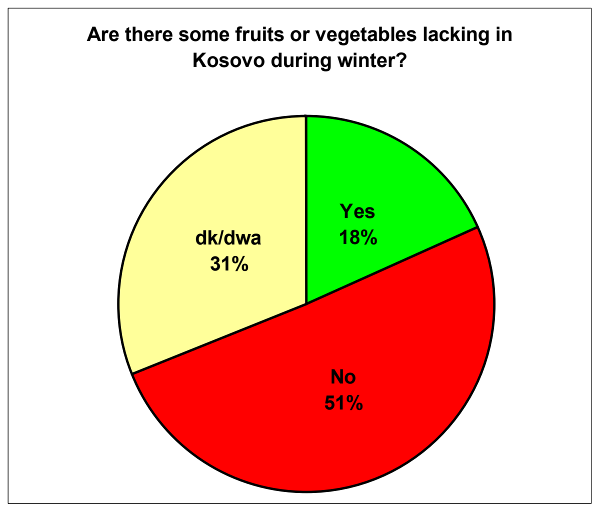
The consumers' awareness about winter F&V is fairly limited. 25 % of the population does not even seem to understand what it is. And this is definitely confirmed by the narrowness of the commodities range used in the traditional Kosovar diet.

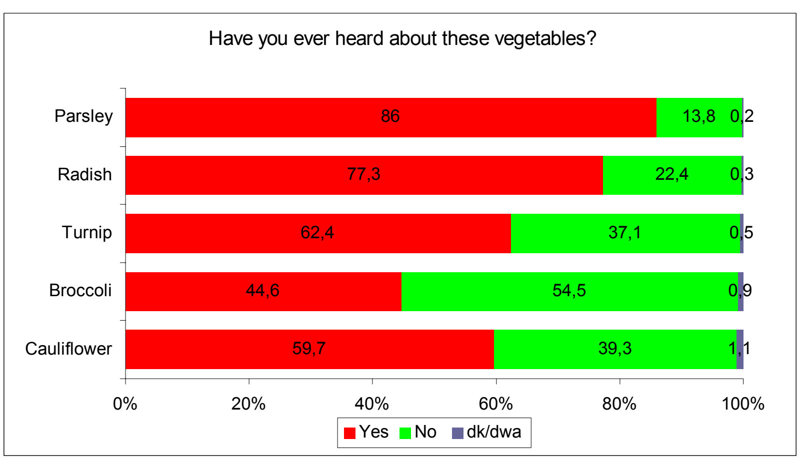
There is definitely no typical seasonal ForV, but there are some that are known to be still available during off-season period. Indeed when asked the question:"which are the F&V you now that can be found mainly in winter" people mention the same commodities as the ones highlighted earlier, that is bananas and apples for fruits, and tomatoes and peppers for vegetables. Although they aren't winter F&V they are still consumed apart summer (because of imports).

Obviously the majority of the population is satisfied with the winter offer of vegetables. From our observation, we noticed that the offer is pretty much the same all the year round because of imports from southern countries.

For the 18% of the population thinking that a few fruits and vegetables are missing during winter, the following items are lacking:

- Peaches, grapes, strawberries, cherries and watermelon
- Peppers and tomatoes (they are still available during winter but their price really increases compared to summer).



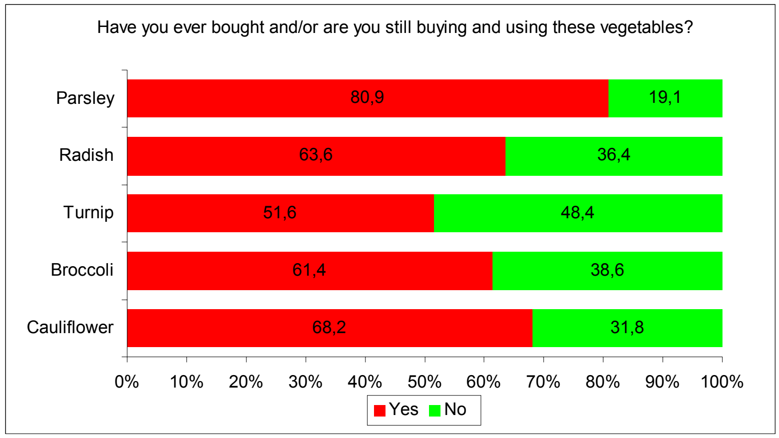


The purpose of this question was to assess the consumers' awareness about some winter vegetables, which were perceived to be quite close to the traditionally used ones.

Then it seems there is a potential for cauliflower and broccoli, but the demand for other more rare products is definitely scarcer.

This result confirms what was highlighted above: between 30 and 40% of the population are potential consumers of cauliflower and broccoli.

The figures for turnip do not appear really coherent as the share of the population declaring purchasing turnip is actually higher than the share of population knowing it. Nevertheless, this vegetable still represent an opportunity for winter production.



5.10. Potential of dried fruits and vegetables?

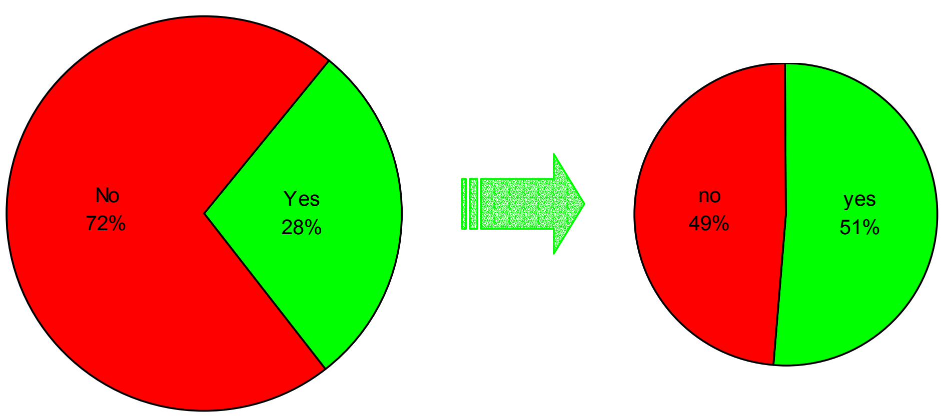
As the producers are currently confronted to a shortage of outlet for their production, one of the solutions consists in selling these commodities later in the year when the peak season is over.

The market of frozen vegetables is almost inexistent, and rather inappropriate for commodities such as tomatoes and peppers. Therefore the drying technologies seem to present a fairly interesting potential. But once again the issue of the existence of a market is crucial before tempting any support action for the development of such products.

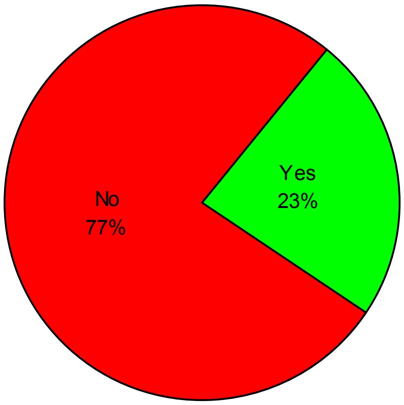
The below results are really encouraging as there is a minimum of approximately ¼ of the population that is familiar with dried vegetables, and among this 25 % of the population, at least half of them have tried and/or still consume such commodities (except for mushrooms).

Mushrooms and plums are definitely interesting products, and we have seen earlier that the population in Kosovo is really keen on consuming dried fruits (figs for instance).

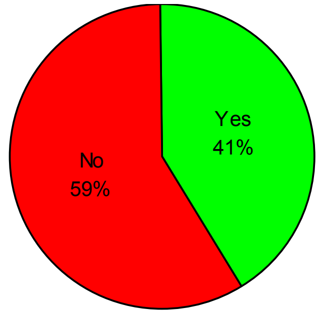
Have you ever seen dried tomatoes? *Have you or do you sometimes buy it?*



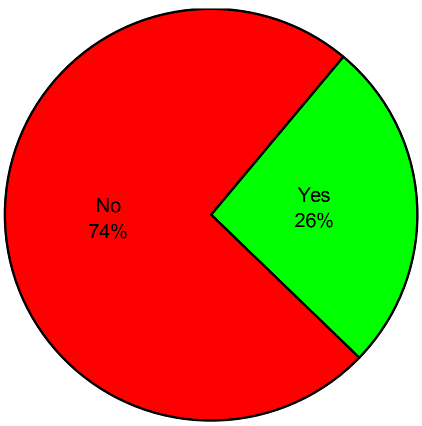
Have you ever seen dried string beans?



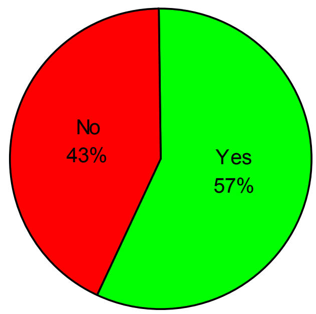
Have you or do you sometimes buy it?



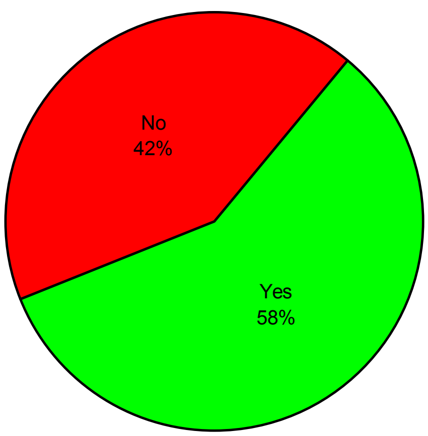
Have you ever seen dried onions?



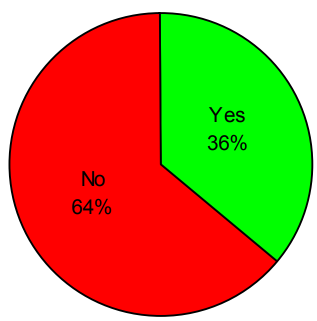
Have you or do you sometimes buy it?



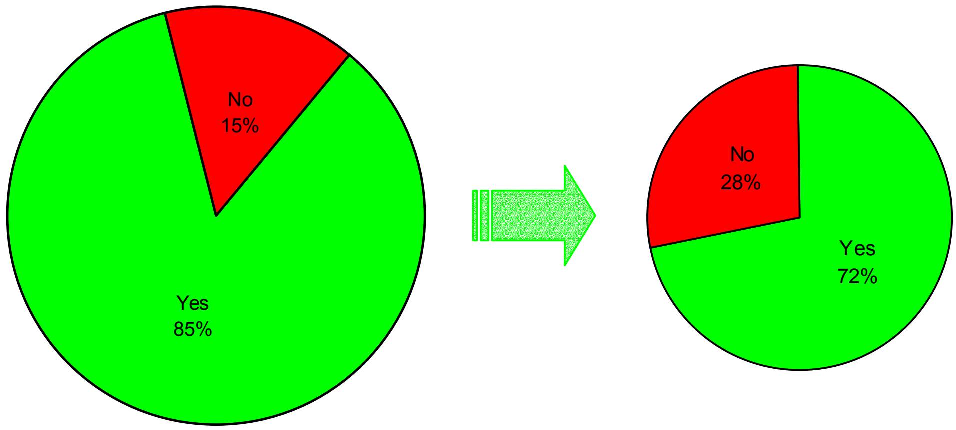
Have you ever seen dried mushrooms?



Have you or do you sometimes buy it?



Have you ever seen dried plums? *Have you or do you sometimes buy it?*



Apart these commodities, we also tried to evaluate the range of dried commodities known by the Kosovar consumers. We managed to define the following hierarchy starting from the most known item to the less popular:

- Plums
- Apples
- Grapes
- Pears
- Peppers
- Figs

Plums are known to be a product that can be dried and obviously a large share of the population has been exposed to such a product.

For apples and pears, the result is a bit more surprising as it is not a commodity that is currently available on the market. Moreover such products are just starting to become popular in western European markets.