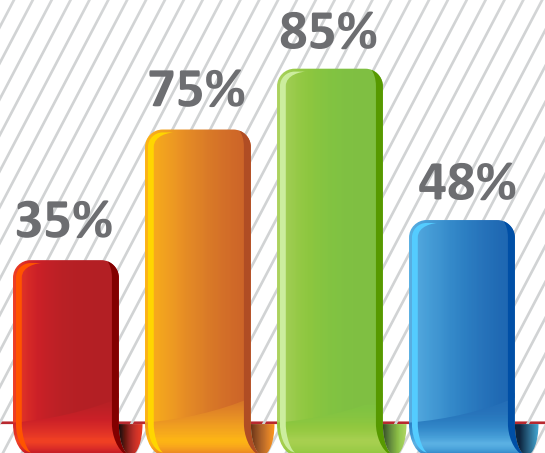




# KOSOVO HORTICULTURE TRADE BALANCE REPORT 2007-2011



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## Table of Contents

<b>1. Summary .....</b>	<b>4</b>
<b>2. Main findings and conclusions .....</b>	<b>6</b>
<b>3. General Data on import of foodstuff in Kosovo .....</b>	<b>9</b>
3.1 General data on trade of foodstuff in period 2007-2011 .....	9
<b>4. General data on trade of horticulture products in period 2007-2011.....</b>	<b>13</b>
<b>5. Trade of main vegetables 2007-2011 .....</b>	<b>14</b>
5.1 Import of main vegetables .....	14
5.1.1 Countries of origin of import for main vegetables.....	15
5.2 Export of main vegetables.....	16
5.2.1 Countries of destination of export for main vegetables.....	17
5.3 Import versus export – Kosovo vegetables trade 2007-2011 .....	18
<b>6. Trade of main fruits 2007-2011 .....</b>	<b>19</b>
6.1 Import of main fruits.....	19
6.1.1 Countries of origin of import for main fruits .....	20
6.2 Export of main fruits .....	21
6.2.1 Countries of destination of export for main fruits .....	21
6.3 Import versus export – Kosovo fruits trade 2007-2011 .....	22
<b>7. Trade of processed fruit and vegetable products 2007-2011 .....</b>	<b>23</b>
7.1 Import of processed fruit and vegetable products.....	23
7.1.1 Countries of origin of import for processed fruit and vegetable products .....	24
7.2 Export of processed fruit and vegetable products.....	26
7.2.1 Countries of destination of export for processed fruit and vegetable products .....	27

## 1. Summary

This report focuses on a detailed analysis of Kosovo's external trade of horticulture products (fresh and processed) in the period 2007-2011 and compares trends in horticulture with respective data for foodstuff and Kosovo's overall external trade. Data are from Kosovo Customs and Kosovo Agency of Statistics.

The **second section** presents main findings from the analysis of the data in the next sections of the report.

The **third section** of the report introduces overall trade of the horticulture products compared to other foodstuff and includes general data of Kosovo's overall external trade. It is observed that there is a highly increasing trend in value of Kosovo's overall imports (€2.5 Billion in 2011) and import of foodstuff other than horticulture products (€132 Million in 2011). However, import (in value) of the group of horticulture products (€67 Million in 2011) shows a trend of almost stability. On the other hand trends in value of Kosovo's overall export (€319 Million in 2011) and export of foodstuff other than horticulture products (€9.2 Million in 2011) are increasing. While export (in value) of the horticulture group of products (€7 Million in 2011) shows a more stable trend. It is evident from the data presented that Kosovo has a highly negative trade balance (€60 Million in 2011) for these horticulture products as for many other food and non-food products.

The **fourth section** goes further to describe in general figures the trade of horticulture products, focusing also on volumes of products being traded. It is observed that there is a considerable decrease (by 1,800 tonnes) in quantities of vegetables imported in 2011, whereas the value of vegetable imports (€18.9 Million in 2011) has actually increased! On the other hand fruit export value (€1.7 Million in 2011) has increased at a much higher rate compared to exported fruit quantities. Meanwhile vegetable exports have shrunk in terms of value (€2.6 Million in 2011) and quantity over the period described.

**Section five** deals in more detail with trade of vegetables with focus on five main vegetables: tomato, pepper, cabbage, onion and cucumber. Interesting observations are that in value tomato and cucumber imports have decreased in 2011, pepper and cabbage imports are stable between 2010 and 2011, while onion import value has considerably increased in 2011. Other vegetable imports have a declining tendency. Main vegetables are in 2011 still imported primarily from Turkey, Macedonia and Albania; however there is a shift towards more imports from Albania and Macedonia. Surprisingly there is a very high value of onion import from the Netherlands in 2011. Main vegetables' export values are very low in comparison to import values. Among the five main vegetables, pepper export value is the more significant in 2011. Onion export has an increasing trend; while for the other vegetables export value is low and no real trend can be determined. Significant potato values have been exported in 2011 however less than in previous years due to trade issues with Albania. The five main vegetables are exported primarily to Montenegro and Switzerland.

**Section six** deals with trade of fruits with focus on five main fruits: watermelon, apple, strawberry, peach and plum. The data show that for all five fruits there is a reduction in import value in year 2011. Apple imports are still highest in value among the five main fruits. In 2011 main fruits are imported mainly from Macedonia, Albania, Serbia, Italy and Slovenia; there is a shift towards more fruit imports from Macedonia and Albania and less fruit imports from Serbia and Greece. Main fruits' export values are still extremely low in 2011 with no significant trends. On the other hand, wild fruits export has increased considerably in 2011. Main countries of destination of five main fruits export are Germany and Serbia.

**Section seven** describes trade of processed fruit and vegetable products such as processed cucumbers, processed peppers, ajvar, processed tomatoes, processed mushrooms, French fries, potato chips, jams, compotes, juices and concentrates. In 2011 almost all of the categories of processed products show an increase in import value, with exception of processed pepper which shows a decrease. Imports of processed products come from numerous countries; an interesting observation is that less processed products come from Serbia in 2011. Exports of processed products have generally reduced in value in 2011; exceptions are potato chips and mushrooms. However it is noticed that some of the exported processed products are not recorded under the corresponding code but in a general category. Main countries of destination of processed fruit and vegetable products are Macedonia, Montenegro, Austria, Croatia, Albania and Slovenia.

## 2. Main findings and conclusions

It is evident from the data presented that Kosovo has a highly negative trade balance (€60 Million) for these horticulture products as for many other food and non-food products. However it is interesting to describe some findings and conclusions from the analysis in this report.

By looking at the general values and quantities imported of the fresh and processed horticulture products it is noticed that such imports have reached a peak in the two years 2010 and 2011, while the general trend seems to be stability of imports especially if we refer to processed horticulture products. On the other hand if we refer to quantities of fresh vegetables imported there is a trend of reduction with the peak in 2010. Meanwhile the value of imports of other foodstuff in the period 2007-2011 has increased at a rate twice as high as that of fresh and processed horticulture products.

Considering general values and quantities of exported fresh and processed horticulture products it is noticed that fresh fruit exports are very low and fluctuations are considerable during the period. However in general there is stability for exports of fresh vegetables and processed horticulture products. An exception is year 2011 in which vegetable export value and quantity have decreased considerably. This significant drop is related to the high quantities of potatoes usually exported from Kosovo to Albania. In the years 2010 and 2011 Albania has put up a high reference price for Kosovo potatoes exported to Albania. This has caused reduction of potato exports to Albania.

Import data of individual fresh vegetables show that generally peak import levels have been reached in 2010 and are either stable in 2011 or decreasing. The exception is onions which show significant import increase in the last years, and this may indicate a low competitiveness of onion production in the local market. Looking at exported fresh vegetables quantities and values, they are very low. It is evident that Kosovo's next most competitive vegetable after potatoes is pepper, with considerable quantities exported.

Import data of individual fresh fruits show a similar peak level in 2010 and a general reduction in 2011. This indicates a good level of import substitution for fresh fruits such as watermelon, apple, strawberry and plum. Import of bananas and other citrus fruits is very high and increasing in trend and that causes the import value of the whole fruit group to increase. Looking at exported fresh fruit the values and quantities are very low. An interesting observation is that export of wild fruits of the non-wood forest product group has increased considerably especially in 2011, even though overall quantities of these products have not increased at the same high rate. This indicates that these products may have addition in value due to better level of processing within Kosovo and receive a better price in export markets.

Import data of groups of processed products show that in general import values of these groups are relatively stable in the period 2007-2011. Exceptions are processed mushrooms, French fries and compotes which show relative

increase in import value, while the juices category shows a big decrease in import. An interesting finding is that the import quantity of French fries has increased to a great extent; however the average import price is very low in comparison to previous years. This may represent an instance of dumping of this product in the Kosovo market or low quality.

There are interesting findings and conclusions in terms of countries with which Kosovo trades horticulture products. Macedonia is still the main supplier of fresh vegetables for Kosovo. However Albania is becoming an important vegetable supplying country in the off-season for Kosovo, especially for tomato, cabbage and cucumber. In general the presence of Turkish or Macedonian fresh vegetable products in the Kosovo market is decreasing. On the other hand Netherlands has become a stable supplier of onions for Kosovo. In 2011 Kosovo exported vegetables mainly to Montenegro, Serbia and Albania and some EU countries such as Switzerland and Germany.

Fresh fruit imports come to Kosovo mainly from Macedonia. In 2011 Albania is also more present in the Kosovo market with fresh fruit imports, especially watermelon. Greece and Serbia, countries which formerly supplied high quantities of fruits, are now less and less present in Kosovo's fresh fruit market. On the other hand Kosovo fresh fruit exports are insignificant with exception of wild fruits.

In 2011 processed fruit and vegetable products have come to Kosovo mainly from Macedonia (processed cucumbers, peppers, jams and concentrates), Serbia (potato chips), China (processed mushrooms) Austria (compotes and juices), Germany (French fries) and Italy (processed tomato). In general Serbia's presence with processed horticulture products in the Kosovo market has decreased drastically for most products. Kosovo exports of processed fruit and vegetable products are low in quantity and value, and it is difficult to notice trends. However confirmed markets for Kosovo processed horticulture products are Macedonia, Austria, Montenegro, Croatia and Albania.

## Conclusions

### The horticulture sector of Kosovo is competitive in the internal market.

In the last two years horticulture imports are stagnating in value and slightly decreasing in quantity. This development can be interpreted as the sector having grown more competitive against imports in the local market.

### There is still potential for more import substitution.

Imports are still satisfying part of the local demand which could be covered by Kosovo producers through better planning (lettuce, onion and watermelon) and extending the crop harvest season (tomatoes, cucumbers). This pattern is reflected in the trade statistics where imports fulfil the out of season demand and receive high prices.

### Neighbouring countries are moving faster.

In the last years most of the fresh fruits and vegetables imported come from Macedonia and Albania. Although there are climatic factors related to this, statistics suggest that neighbouring countries have moved faster and are more competitive than Kosovo's horticulture sector.

### Kosovo has a potential to export in the region.

Statistics show that Kosovo exports small quantities of vegetables (mainly potatoes and peppers) and fruits (mainly wild fruits) which have their main destination in neighbouring countries: Albania, Serbia, Montenegro and Macedonia and part of this export is used as raw material for processing industry in the region. This shows that Kosovo is competitive in production/collection of some crops.

### Kosovo still cannot compete in advanced international markets.

Export statistics show very little exports into high standard Western European markets. Kosovo's fresh fruits and vegetables sector not only does not fulfil quality standards (including classification) requested by these markets, but also lacks the necessary volumes in order to be able to supply in continuity. This explains why Kosovo fresh exports to advanced West Europe markets have stagnated.

### Kosovo has significant export potential on niche markets and by improving standards.

Kosovo's horticulture sector has still a long way to go in order to be able to compete in the Western European general market. Actually the statistics show that Kosovo exports are targeted to niche markets (e.g. for Somborka peppers) such as the Diaspora population in the respective countries (Germany, Austria and Switzerland). In such niche markets Kosovo still has got enough potential to expand exports.

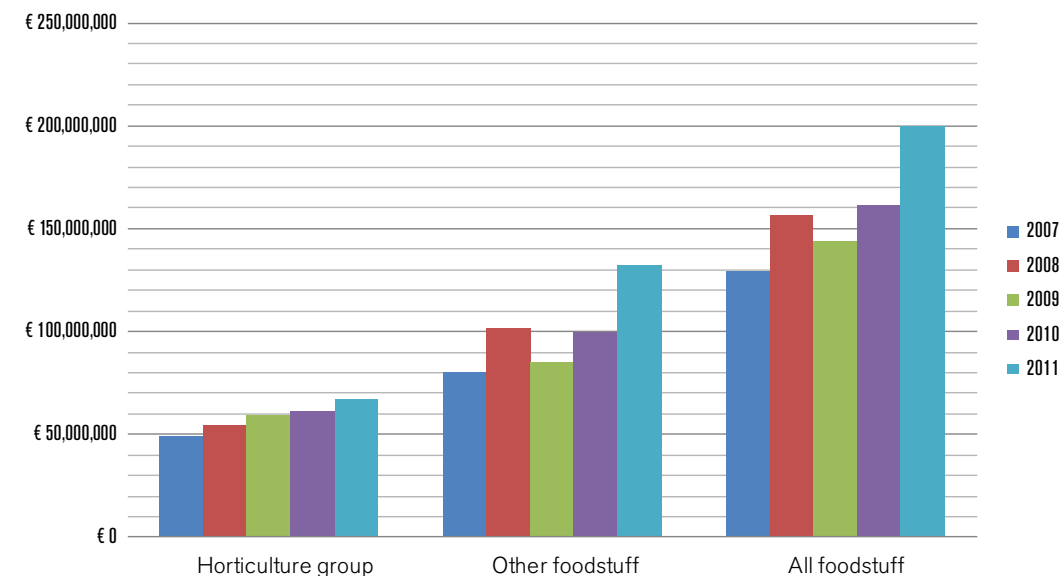
## 3. General Data on import of foodstuff in Kosovo

### 3.1 General data on trade of foodstuff in period 2007-2011

This section focuses on trade of horticulture products and other foodstuff as well as provides an overall picture of Kosovo's external trade. All data in this report are from Kosovo Customs and Kosovo Agency of Statistics.

Table 1 presents values of total imports of horticulture group of products<sup>1</sup>, total imports of other foodstuff<sup>2</sup>, and all foodstuff imports<sup>3</sup>:

#### Import of foodstuff in Kosovo



<sup>1</sup> "Horticulture" group: fresh fruits, fresh vegetables, processed fruits and processed vegetables.

<sup>2</sup> "Other foodstuff" group includes food items from Kosovo Customs TARIK chapters 06, 09, 10, 11, 12, 19

<sup>3</sup> All foodstuff: "horticulture" group + "other foodstuff" group

Year	2007	2008	2009	2010	2011	% (2011)
Total import horticulture group	€ 48,857,358	€ 54,674,277	€ 59,327,237	€ 61,698,227	€ 67,237,691	2.7%
Total import all foodstuff	€ 129,266,635	€ 156,512,490	€ 144,448,563	€ 161,298,239	€ 199,655,684	8.0%
Total Kosovo imports <sup>4</sup>	€ 1,576,186,000	€ 1,928,236,000	€ 1,935,541,000	€ 2,157,725,000	€ 2,492,348,000	100%

Table 1 – Summary of Kosovo imports in value (Euros) period 2007-2011

The value of Kosovo's total imports has increased by 58% in the period 2007-2011. This value reached almost 2.5 billion Euros in 2011, with a 15.5% increase compared to 2010. The trends of import value for the group "other foodstuff" and "horticulture" group is upward over the whole period analysed. It is interesting to compare the group "other foodstuff" with the "horticulture" group. Import value of "other foodstuff" shows an increase of about 65% between 2007 and 2011, whereas the "horticulture" group only about 38%. Between 2010 and 2011, the group "other foodstuff" shows an increase in import value of about 33% whereas the horticulture group only about 9%.

**Within the "horticulture" group<sup>5</sup> (table 2):**

Since 2007 import of fruits has gradually increased by a considerable value of almost 8.9 million Euros (61%). Between 2010 and 2011 the increase in value of fruit import is about 1 million Euros (4.7%). Import of vegetables shows an increase with a value of almost 5.5 million Euros (41%) compared to the beginning of the period in consideration. Between 2010 and 2011 the increase in value of vegetable import is about 0.5 million Euros (3.2%). In terms of processed fruit products import there is general tendency towards stability during the period presented in the graph. However in year 2011 as compared to the previous year, import of processed fruit products increased considerably by about 3 Million Euros (30.7%). Import of processed vegetable products shows a slight increase since 2007. In 2011 there is a slight increase by about 0.8 million Euros (7.8%) in import of processed vegetable products over 2010.

Year	2007	2008	2009	2010	2011
Fresh fruits	€ 14,588,681	€ 17,387,803	€ 20,377,598	€ 22,431,665	€ 23,486,307
Fresh vegetables	€ 13,384,230	€ 16,372,369	€ 16,338,254	€ 18,296,261	€ 18,877,802
Processed Fruits	€ 11,808,712	€ 11,213,452	€ 11,496,550	€ 9,913,734	€ 12,956,885
Processed Vegetables	€ 9,075,734	€ 9,700,653	€ 11,114,834	€ 11,056,568	€ 11,916,697

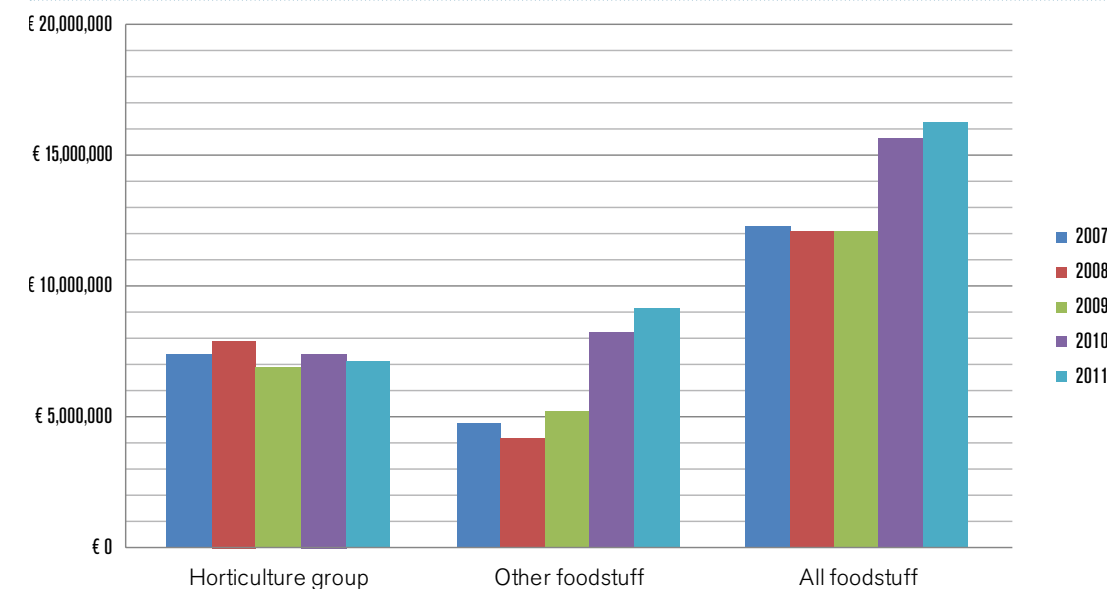
Table 2 – Kosovo imports of the horticulture group of products in value (Euros) period 2007-2011

<sup>4</sup> "Horticulture" group: fresh fruits, fresh vegetables, processed fruits and processed vegetables.

<sup>5</sup> Total import of fruits includes fruits cultivated and not cultivated in Kosovo such as citrus fruits, exotic fruits, different kinds of nuts, raisins and other dried fruits etc. Total import of vegetables includes crops both cultivated and not cultivated in Kosovo, fresh and dried vegetables (such as dried beans etc), seeds (such as potato seeds). Total import of processed fruit products includes mainly different jams, compotes, juices and concentrates. Total import of processed vegetable products includes mainly different vegetable pickle products, ajvar, processed tomatoes, mushrooms, potato fries and chips and different concentrates.

Table 3 presents values of total exports of horticulture group of products, total exports of other foodstuff, and all foodstuff exports:

Export of foodstuff in Kosovo



Year	2007	2008	2009	2010	2011	% (2011)
Total import horticulture group <sup>6</sup>	€ 48,857,358	€ 54,674,277	€ 59,327,237	€ 61,698,227	€ 67,237,691	2.7%
Total import all foodstuff <sup>7</sup>	€ 129,266,635	€ 156,512,490	€ 144,448,563	€ 161,298,239	€ 199,655,684	8.0%
Total Kosovo imports <sup>8</sup>	€ 1,576,186,000	€ 1,928,236,000	€ 1,935,541,000	€ 2,157,725,000	€ 2,492,348,000	100%

Table 3 – Summary of Kosovo exports in value (Euros) period 2007-2011

The value of Kosovo's total exports has increased by 93.3% in the period 2007-2011. This value reached almost 320 million Euros in 2011, with a 7.8% increase compared to 2010. In 2011 the coverage of total imports with total

<sup>6</sup> "Horticulture" group: fresh fruits, fresh vegetables, processed fruits and processed vegetables.

<sup>7</sup> All foodstuff: "horticulture" group + "other foodstuff" group

<sup>8</sup> Data presented in this table are from the Kosovo Agency of Statistics

exports is only 12.8%. The trend of export value for the “other foodstuff” group is upward while for the “horticulture” group is more or less stable over the period analysed. However it is not known whether there are instances of re-export in the “other foodstuff” group. We can also compare exports of the “horticulture” group with the “other foodstuff” group. Export value of “other foodstuff” group shows an increase of about 90% between 2007 and 2011, whereas the “horticulture” group shows a decrease in export value of 4%.

**Within the “horticulture” group (table 4):**

Export of fresh fruits shows to be unstable over the period presented in the graph. In 2011 the total value of fruit export is higher than in 2010 by almost 1 million Euros, which represents a 144% increase!

Export of fresh vegetables shows to be relatively stable during the period presented in the graph, with exception of year 2011 where there is a considerable drop in exports by a value of about 1 million Euros (-29%) compared to 2010. In terms of processed fruit products export there is almost no change in values if we compare year 2007 and 2011. However there are some oscillations in the in-between years.

Export of processed vegetable products shows a decrease since 2007. In 2011 the value exported is about half a million Euros, which is slightly higher (2.3%) than in 2010.

Year	2007	2008	2009	2010	2011
Fresh fruits	€ 806,780	€ 1,186,513	€ 461,309	€ 687,769	€ 1,679,618
Fresh vegetables	€ 3,470,541	€ 3,634,802	€ 4,132,816	€ 3,668,968	€ 2,608,863
Processed Fruits	€ 2,305,937	€ 2,459,928	€ 1,929,313	€ 2,565,025	€ 2,348,694
Processed Vegetables	€ 866,009	€ 658,178	€ 374,074	€ 498,964	€ 510,358

**Table 4 – Kosovo exports of the horticulture group of products in value (Euros) period 2007-2011**

## 4. General data on trade of horticulture products in period 2007-2011

Below is a table showing the Kosovo trade balance in 2011 for four categories (sub-groups) of the “horticulture” group.

Table 5: Trade balance in values for fresh and processed fruits and vegetables in 2011					
	Fruits	Vegetables	Proc. Fruits	Proc. Vegetables	Total
Import	€23,486,307	€18,877,802	€12,956,885	€11,916,697	€67,237,691
Export	€1,679,618	€2,608,863	€2,348,694	€510,358	€7,147,533
Balance	€(21,806,689)	€(16,268,939)	€(10,608,191)	€(11,406,339)	€(60,090,158)

As seen in the table, trade balance of fresh fruits is largest negative by 21.8 Million Euros. Processed fruits have a negative trade balance of 10.6 Million Euros. Vegetables and processed vegetables have a negative trade balance of 16.2 Million Euros and 11.4 Million Euros. The trade balance of the “other foodstuff” items is negative in value of 123.2 Million Euros.

In the next two tables are presented tonnes of imported and exported quantities for the sub-groups.

Year	2007	2008	2009	2010	2011
Fresh fruits	49,979	56,343	57,950	63,837	66,699
Fresh vegetables	45,135	44,105	44,434	48,349	46,533
Processed fruits and vegetables	26,729	22,839	21,128	17,625	19,223

**Table 6 - Import of main groups of products in tonnes 2007- 2011**

Similar trends are noticed in imported quantities as in imported values. An interesting exception is a decrease by about 1,800 tonnes in quantities of vegetables imported in 2011, whereas the value of vegetable imports has actually increased.

Year	2007	2008	2009	2010	2011
Fresh fruits	678	1,632	714	811	966
Fresh vegetables	22,514	23,060	22,711	23,357	16,350
Processed fruits and vegetables	6,779	7,546	5,647	7,409	6,093

**Table 7 - Export of main groups of products in tonnes 2007- 2011**

Fruit export quantities and values vary year to year, however in 2011 the value of fruit exports is very high compared to other years<sup>9</sup>, whereas the quantities exported are moderate. Overall vegetable exports have shrunk in value as well as in quantity during the period. The impact of potato trade is significant in this situation. Processed fruits and vegetables show similar trends in exported quantities compared to exported values.

<sup>9</sup> The composition of the imports and exports in each group is detailed further in the next sections

## 5. Trade of main vegetables 2007-2011

### 5.1 Import of main vegetables

Within the fresh vegetables sub-group “five main vegetables” are analyzed in this section including tomato, pepper, cabbage, onion and cucumber. As seen in table 6 below, Kosovo imports high values of these main vegetables.

Import of main vegetables (€) 2007-2011					
Year	2007	2008	2009	2010	2011
Tomato	5,315,869	4,739,592	4,712,086	5,297,246	4,792,708
Pepper	1,991,788	3,434,250	3,715,206	4,534,260	4,604,758
Cabbage	591,017	708,334	718,665	933,192	996,443
Onion	854,265	1,371,983	1,122,623	1,970,962	2,806,551
Cucumber	982,074	1,330,319	1,363,639	1,545,034	1,370,566
Other vegetables	3,647,210	4,785,883	4,704,027	4,013,556	4,306,775
<b>Total in Euros</b>	<b>13,384,230</b>	<b>16,372,369</b>	<b>16,338,254</b>	<b>18,296,261</b>	<b>18,879,813</b>
<b>Total in tonnes</b>	<b>45,135</b>	<b>44,105</b>	<b>46,443</b>	<b>50,359</b>	<b>46,533</b>

Table 8 – Import of main vegetables in values and totals in tonnes 2007-2011

- In 2011 out of the five vegetables considered, **tomato** import values are still highest with a decrease from 2010. The trend noticed is stability in tomato import values over the period 2008-2011.
- **Pepper** import shows a small increase in values in 2011 as compared to 2010. The trend with pepper import values is going upward over the period analysed.
- **Cabbage** import show a small increase in values imported. The trend of cabbage import value shows an increase over the whole period.
- **Onion** import shows a highly increasing trend over the past years in quantities and values; only in 2011 as compared to 2010 there was an increase of about 850 thousand Euros of onions imported.
- **Cucumber** import shows a decrease in values of about 180 thousand Euros in 2011 as compared to 2010. Overall cucumber import values have reached stability in the period 2008-2011.
- The considerable value of **other vegetables** includes mainly potatoes and beans.

### 5.1.1 Countries of origin of import for main vegetables

The table below shows main countries of origin of import for main vegetable imports in 2011 by value.

Import	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)
Tomato	Turkey	44.3%	2,121,402	4,193	Albania	34.2%	1,640,742	5,593	Macedonia	18.5%	887,491	4,453
Pepper	Turkey	49.1%	2,262,090	3,478	Macedonia	30.5%	1,402,848	4,454	Serbia	6.5%	298,945	420
Cabbage	Macedonia	72.5%	722,411	2,361	Albania	25.1%	249,745	1,068	Slovenia	1.4%	13,824	19
Onion	Netherlands	54.8%	1,537,221	1,549	Macedonia	23.6%	660,995	2,685	Albania	5.1%	144,214	469
Cucumber	Macedonia	39.9%	547,012	3,090	Albania	39.1%	536,171	1,856	Turkey	17.2%	235,528	442

Table 9 – Countries of origin of import for main vegetable imports in 2011 by value

In 2011 **tomatoes** imported in Kosovo came mainly from Turkey (44.3%), as well as Albania (34.2%). It is interesting to mention that the share in quantity of tomato imports coming from Albania has increased considerably compared to previous years. Tomato import from Macedonia has considerably decreased in the period 2009-2011.

In 2011 **peppers** were mainly imported from Turkey (49.1%) and Macedonia (30.5%), which is a similar situation as in 2010. However the trend of pepper imports shows a decrease of quantities coming from Turkey in the period 2009-2011.

As in previous years, in 2011 **cabbages** have been imported mostly from Macedonia (72.5%) as well as from Albania (25.1%). The share of cabbage import from Albania has doubled only in the last year, while the share of import from Macedonia has decreased considerably.

**Onions** imported in Kosovo in 2011 came in higher value from Netherlands (54.8%) and Macedonia (23.6%). In the period 2009-2011 the Netherlands has been the biggest supplier of onions for Kosovo.

In 2011 **cucumbers** were imported from Macedonia (39.9%) and Albania (39.1%). The share of cucumber imports from Macedonia has decreased during the period 2009-2011, while Albania has emerged as one of the main suppliers of cucumbers to the Kosovo market in the last few years.

## 5.2 Export of main vegetables

Five main vegetables analyzed in this section include tomato, pepper, cabbage, onion and cucumber. As seen in the table below, Kosovo exports relatively small values of these main vegetables.

Export of main vegetables (€) 2007-2011					
Year	2007	2008	2009	2010	2011
Tomato	162,822	73,444	16,582	123,124	86,091
Pepper	125,675	310,185	330,376	495,979	457,207
Cabbage	68,081	19,552	12,347	11,902	53,524
Onion	90,489	63,270	25,517	103,366	131,718
Cucumber	1,991	1,337	230	1,523	2,313
Other vegetables	3,019,477	3,165,006	3,745,755	2,931,066	1,878,010
<b>Total in Euros</b>	<b>3,470,541</b>	<b>3,634,802</b>	<b>4,132,816</b>	<b>3,668,968</b>	<b>2,610,874</b>
<b>Total in tonnes</b>	<b>22,514</b>	<b>23,060</b>	<b>22,711</b>	<b>23,357</b>	<b>16,350</b>

Table 10 – Export of main vegetables in values and tonnes 2007-2011

Table 10 above shows Kosovo values of exports of main vegetables are very low compared to imports.

- In 2011 out of the five vegetables considered **pepper** exports are highest in terms of value and also quantity but with a drop in value as compared to 2010.
- **Tomato** export has a downward trend from 2010; in 2011 it did not exceed 450 tonnes and in terms of value 86 thousand Euros.
- **Onion** export trend is increasing; in 2011 it did not exceed 600 tonnes and in terms of value about 132 thousand Euros.
- **Cabbage** export trend is upward; in 2011 it was slightly less than 700 tonnes and in terms of value about 53.5 thousand Euros.
- **Cucumber** export is very low with no significant trend; in 2011 it was about 20 tonnes and in terms of value about 2,300 Euros.

The significant value of **other vegetables** export includes mainly potatoes. However it is noticed that potato exports have decreased considerably in the period 2009-2011, most likely due to trade barriers in neighbouring countries.

### 5.2.1 Countries of destination of export for main vegetables

The table below shows main countries of destination for main vegetable exports in 2011 by value.

Export	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)
Tomato	Montenegro	64.3%	55,379	319	Switzerland	19.9%	17,155	51	Macedonia	12.1%	10,382	23
Pepper	Switzerland	24.7%	113,030	275	Serbia	19.4%	88,665	812	Germany	18.8%	85,921	242
Cabbage	Montenegro	50.9%	27,231	313	Serbia	48.0%	25,677	347	Macedonia	0.9%	465	9
Onion	Montenegro	59.4%	78,150	387	Albania	23.5%	30,912	178	Macedonia	11.3%	14,982	3
Cucumber	Montenegro	97.7%	2,259	19	Germany	2.3%	54	0.5	Others	-	-	-

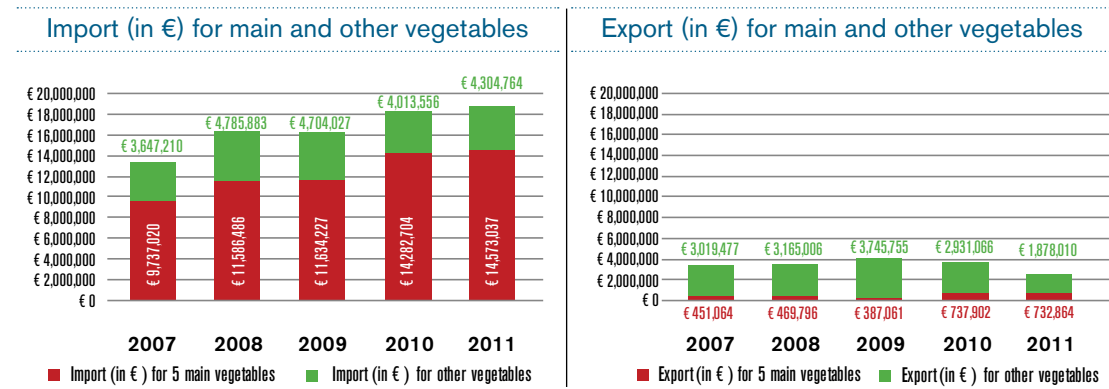
Table 11 – Countries of destination of export for main vegetable exports in 2011 by value

- In 2011 **tomatoes** exported from Kosovo in value go mainly to Montenegro (64.3%) and Switzerland (24.7%). Montenegro was the main destination of Kosovo tomato exports in the past.
- In 2011 Kosovo **peppers** in terms of value were mainly exported to Switzerland (24.7%) and Serbia (19.4%), while in 2010 main exports went to Montenegro and Germany.
- In 2011 **cabbages** from Kosovo were mostly exported to Montenegro (50.9%) and Serbia (48.0%). In past years cabbages were also mostly exported to Montenegro.
- In 2011 the share of **onion** exports went to Montenegro (59.4%) and Albania (23.5%), while in 2010 Albania was the first country for Kosovo onion exports.
- In 2011 **cucumber** exports were very small and went mainly to Montenegro (97.7%).

There are a few visible trends in export of main vegetables. The distribution of Kosovo exports by country is similar to previous years and quantities are still low. Montenegro, Serbia and Albania are the main countries of the region where Kosovo exports main vegetables. Switzerland and Germany are countries where some export of vegetables occurs from Kosovo.

### 5.3 Import versus export – Kosovo vegetables trade 2007-2011

This section will analyze the share of 5 main vegetables within the total vegetable imports and exports compared side by side. The five main vegetables considered are: tomato, pepper, cabbage, onion and cucumber.



Graph 1 – Side by side Import and Export in value (€) for 5 main vegetables and other vegetables 2011

The above graphs represent values in Euros for imports and exports of five main vegetables and other vegetables for the period 2007-2011. Import value of five main vegetables shows a small increase (of about 300 thousand Euros) in 2011 over the previous year. Import of other vegetables is stable during years 2008 and 2009, but shows a small increase in 2011 (of about 300 thousand Euros) as compared to year 2010.

On the other hand, in 2011 export value of five main vegetables is almost identical compared to 2010. Export of other vegetables shows an increase in value during years 2007-2009, while in 2010 and in 2011 there is a considerable decrease by about 1.87 million Euros.

### 6. Trade of main fruits 2007-2011

#### 6.1 Import of main fruits

Five main fruits analyzed in this section include watermelon, apple, strawberry, peach and plum. As seen in the table below, Kosovo imports high values of these main fruits.

Year	Import of main fruits (€) 2007-2011				
	2007	2008	2009	2010	2011
Watermelon	1,782,298	1,874,007	2,143,536	2,269,965	2,060,172
Apple	2,341,144	2,866,627	2,979,134	3,690,732	3,596,401
Strawberry	74,927	134,106	133,136	204,723	144,424
Peach	494,417	554,957	447,054	416,914	185,368
Plum	136,607	134,389	94,198	132,405	106,283
Other fruits	9,759,288	11,823,716	14,580,541	15,716,926	17,393,659
<b>Total in Euros</b>	<b>14,588,681</b>	<b>17,387,803</b>	<b>20,377,598</b>	<b>22,431,665</b>	<b>23,486,307</b>
<b>Total in tonnes</b>	<b>49,979</b>	<b>56,343</b>	<b>57,950</b>	<b>63,837</b>	<b>65,542</b>

Table 12 – Import of main fruits in values and tonnes 2007-2011

- In 2011 out of the five fruits considered, **apple** import values are highest however with a reduction in value in 2011 as compared to 2009 and 2010.
- Watermelon** import values decreased in 2011 with about 200 thousand Euros less than in 2010.
- Strawberry** import values are generally low over the period analyzed, a decrease in value of 60 thousand Euros is observed in 2011 compared to 2010.
- Peach** import values fluctuate over the past years; in 2011 there is the most considerable decrease in value of about 230 thousand Euros.
- Plum** import value is not high in 2011, and there is a decrease in value by about 25 thousand Euros over year 2010.
- The very high value of **other fruits** includes mainly bananas and citrus fruits.

### 6.1.1 Countries of origin of import for main fruits

The table below shows main countries of origin of import for main fruits imports in 2011 by value.

Import	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)
Watermelon	Albania	56.4%	1,161,231	8,964	Macedonia	42.7%	878,413	11,325	Turkey	0.9%	20,528	50
Apple	Macedonia	79.2%	2,849,730	9,845	Italy	7.6%	272,507	370	Slovenia	4.9%	177,450	268
Strawberry	Macedonia	96.4%	139,274	159	Slovenia	2.9%	4,240	4	Italy	0.7%	910	1.3
Peach	Macedonia	44.6%	82,632	185	Serbia	38.0%	70,456	165	Albania	14.5%	26,932	47
Plum	Macedonia	63.4%	67,357	142	Serbia	19.6%	20,796	53	Albania	14.6%	15,496	45

Table 13 – Countries of origin of import for main fruit imports in 2011 by value

In 2011 **watermelon** was mostly imported in Kosovo from Albania (56.4%) and Macedonia (42.7%). It is noticed that in years 2010 and 2011 Albania leads in Kosovo imports of watermelon by quantity and value, while in previous years Macedonia was the main import country.

In 2011 **apples** were mainly imported from Macedonia (79.2%) and Italy (7.6%). No significant import of apples from Greece or Serbia is observed in 2010 and 2011, while in 2009 apple import from Greece was more than 10% of the total in quantities and in 2010 apple import from Serbia was 5.2%.

In 2011 **strawberry** imports originated mostly from Macedonia (96.4%) and a small share from Slovenia (2.9%). In previous years Greece was the most important country in terms of quantities of strawberry imports, however in 2010 the share of strawberry import quantities from Greece dropped from 79.3% to 0.4%.

The main countries of origin for **peach** imports were Macedonia (44.6%) and Serbia (38.0%). In 2010 Serbia exported twice as much value peaches in as Macedonia, but in 2011 the situation has been reversed.

In 2011 **plum** imports were mainly from Macedonia (63.4%) and Serbia (19.6%). The share of plum imports coming from Serbia has decreased considerably in the period 2009-2011.

### 6.2 Export of main fruits

As seen in table 14 below Kosovo export values of five main fruits are very low compared to imports.

Export of main Fruits (€) 2007-2011					
Year	2007	2008	2009	2010	2011
Watermelon	668	2,755	4,089	3,755	6,974
Apple	1,509	13,322	11,515	66,746	64,817
Strawberry	375	-	-	4,750	12,306
Peach	-	-	29	-	-
Plum	-	116	-	-	48
Other fruits	804,228	1,170,320	445,676	612,519	1,593,772
<b>Total in Euros</b>	<b>806,780</b>	<b>1,186,513</b>	<b>461,309</b>	<b>687,769</b>	<b>1,677,918</b>
<b>Total in tonnes</b>	<b>678</b>	<b>1,632</b>	<b>714</b>	<b>811</b>	<b>962</b>

Table 14 – Export of main fruits in value and tonnes 2007-2011

- In 2011 out of the five fruits considered **apple** exports are highest in terms of value. In 2011 apple export value dropped by 2 thousand Euros compared to the previous year 2010.
- Watermelon** export values are at about 7 thousand Euros in 2011 twice the value in 2010.
- Strawberry, peach** and **plum** exports are inexistent over the period considered.
- The relative high value of **other fruits** exported includes wild fruits in the non wood forest products category.

#### 6.2.1 Countries of destination of export for main fruits

The table below shows main countries of destination for main fruit exports in 2011 by value.

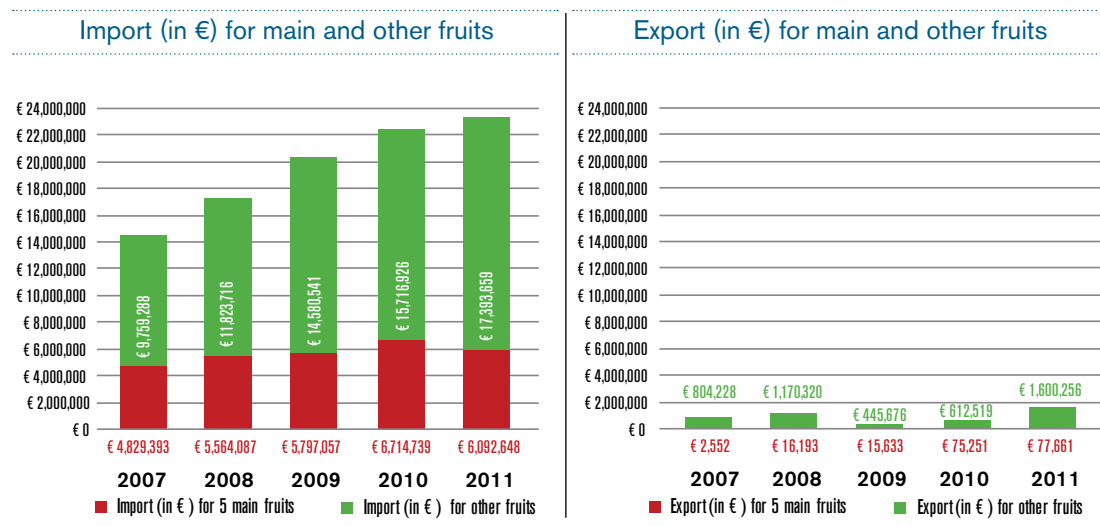
Export	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)
Watermelon	Montenegro	100.0%	490	1	Others	-	-	-	Others	-	-	-
Apple	Germany	72.6%	47,025	14	Serbia	14.7%	9,510	21	Macedonia	10.7%	6,917	17
Strawberry	Serbia	99.8%	12,276	11	Montenegro	0.2%	30	0.3	Others	-	-	-
Peach	-	-	-	-	-	-	-	-	-	-	-	-
Plum	Macedonia	100	48	0.2	-	-	-	-	-	-	-	-

Table 15 – Countries of destination of export for main fruit exports in 2011 by value

In 2011 Kosovo exported a small value of **watermelon** mainly to Montenegro (100.0%) and a small value of **apples** and **strawberries** mainly to Germany and Serbia respectively. Very low values of main fruit exports are observed in the period 2009-2011.

### 6.3 Import versus export – Kosovo fruits trade 2007-2011

This section analyzes the share of 5 main fruits within the total fruit imports and exports compared side by side. The five main fruits considered are: watermelon, apple, strawberry, peach and plum.



Graph 2 – Side by side Import and Export in value (€) for 5 main fruits and other fruits

Graph 2 represent values in Euros for imports and exports of five main fruits and other fruits for the period 2007-2011.

Import value of five main fruits shows an increase almost every year since 2007 with the exception of 2011. In 2011 there was a decrease in import value of five main fruits by more than 600 thousand Euros. Import of other fruits shows a continuous and high increase during years 2007-2011, with an additional value of 7.6 million Euros in 2011 as compared to 2007.

On the other hand, in 2011 export value of five main fruits represents very low values, even though there is an increase from the low base of years 2007-2009. Export of other fruits is higher in 2011 than in the period 2007-2010. About 1.68 million Euros worth of fruits were exported in 2011, which is very insignificant compared to imports.

## 7. Trade of processed fruit and vegetable products 2007-2011

Processed fruit and vegetable products are analyzed in main groupings including processed cucumbers, processed peppers (excluding ajvar), ajvar, processed tomatoes, processed mushrooms, French fries, potato chips, fruit jams and marmalades, fruit juices and drinks, and different concentrates.

### 7.1 Import of processed fruit and vegetable products

Table 16 below shows Kosovo imports of processed fruit and vegetable products during 2007-2011.

Products/Years	2007	2008	2009	2010	2011
Cucumbers	323,146	414,881	541,115	392,850	401,856
Pepper	813,236	930,467	883,893	723,538	611,003
Pepper ajvar	325,388	646,919	953,212	755,541	897,410
Tomatoes	420,998	682,237	459,057	663,749	783,388
Mushrooms	1,627,365	1,140,595	845,243	1,421,420	1,686,231
Potatoes french fries	1,030,229	835,453	948,946	1,332,043	1,655,563
Potatoes chips	3,672,063	4,171,220	5,518,928	4,618,659	4,691,735
Jams	1,375,395	1,423,410	1,031,238	1,186,393	1,412,148
Compotes	63,769	121,183	185,294	105,094	326,533
Juices	5,249,273	4,564,982	4,009,269	1,910,761	2,241,270
Concentrates	1,396,247	837,504	844,846	778,324	783,853
Other	4,587,337	5,145,254	6,390,341	7,081,930	9,382,592
<b>Total values (Euros)</b>	<b>20,884,446</b>	<b>20,914,105</b>	<b>22,611,384</b>	<b>20,970,302</b>	<b>24,873,582</b>
<b>Total quantities (t)</b>	<b>26,729</b>	<b>22,839</b>	<b>21,128</b>	<b>17,625</b>	<b>19,223</b>

- In 2011 **processed cucumber** products imports value has increased by 9 thousand Euros as compared to 2010.
- **Processed pepper** imports value shows a decrease tendency through the period 2007-2011. In 2011 quantities of imports for processed peppers excluding ajvar are at about 612 tonnes (less than in 2010).
- Values of **ajvar** import increased again by about 45 thousand Euros in 2011 as compared to 2010.
- Values of yearly imports of **processed tomato** products show a considerable increase over the period analyzed. In 2011 about 1,274 tonnes of processed tomato products were imported, which is 150 tonnes more than in 2010.

- Values of imports of **processed mushrooms** are unstable over the period analyzed, with a relatively high increase by 265 thousand Euros in 2011 as compared to 2010. In 2011 the quantity of processed mushroom products that were imported was 1,188 tonnes about 180 tonnes more than in 2010.
- Import value of **French fries** (processed potatoes) has increased considerably in 2011 by 323 thousand Euros. In 2011, about 3,441 tonnes of French fries were imported as compared to 2,697 tonnes in 2010.
- Import value of **potato chips** has fluctuations over the period 2007-2011, but stable at 4.6 to 4.7 million Euros in last two years. In 2011 Kosovo has imported 1418 tonnes of chips or 56 tonnes more than in 2010.
- Import value of **fruit jams** has significantly gone up in 2011 by 226 thousand Euros. In 2011 quantities of jams imported were 2,097 tonnes, while 2010 import of jams was at 2,181 tonnes.
- Import value of **fruit compotes** is low during 2007-2010, but in 2011 the value of imports jumped to three times as much as the value of 2010. Quantities of imported compotes in 2011 were 205 tonnes while in 2010 110 tonnes.
- The value of import of **fruit juices** has very much decreased from year 2007 to 2010. In 2011 this value is 330 thousand Euros more than in 2010. In 2011 import of fruit juices was 3,258 tonnes while in 2010 import of fruit juices in terms of quantities is at 2,920 tonnes.
- Import value and quantity of **concentrates** has also decreased to a great extent between the years analyzed; in 2011 such import was 469 tonnes or about 784 thousand Euros in value.

Under the heading “other imports” which shows significant increase in the period analysed are mainly imports of different nuts, seeds and olives products which are not produced in Kosovo.

### 7.1.1 Countries of origin of import for processed fruit and vegetable products

The table below shows main countries of origin of import for main processed products in 2011 by value.

Import	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)
Cucumbers	Macedonia	63.2%	230,889	231	Croatia	13.0%	53,422	53	Serbia	7%	29,419	29
Pepper	Macedonia	53.0%	323,564	336	Turkey	15.0%	94,297	74	Serbia	9%	45,985	52
Pepper ajvar	Macedonia	69.3%	622,197	429	Austria	8.0%	71,108	24	Croatia	6%	56,175	42
Tomatoes	Italy	55.1%	431,946	749	Macedonia	14.0%	110,236	162	China	12.0%	90,948	157
Mushrooms	China	62.0%	1,045,124	836	Macedonia	20.0%	340,866	140	Serbia	5%	84,066	52
Potatoes french fries	Germany	50.2%	831,793	1,733	Austria	26.0%	421,311	948	Poland	13.0%	213,420	317
Potatoes chips	Serbia	46.8%	2,096,572	644	Austria	30.0%	1,339,456	373	Turkey	10.0%	433,267	108
Jams	Macedonia	28.7%	404,875	649	Greece	21.0%	292,063	559	Serbia	12.0%	165,710	274
Compotes	Austria	46.0%	149,403	46	Netherlands	17.6%	57,607	51	Greece	12.0%	39,625	29
Juices	Austria	34.7%	778,639	1,224	Slovenia	15.0%	332,912	302	Serbia	13.0%	296,531	459
Concentrates	Macedonia	59.5%	465,711	245	Serbia	12.0%	95,969	58	Slovenia	11.0%	85,346	66

Table 17 – Countries of origin of import for processed products import in 2011 by value

In 2011 **cucumber processed** products were imported mainly from Macedonia (63.2%) and Croatia (13.0%), while Serbia's share of such imports has decreased to a large extent from 2010.

**Processed pepper** products excluding ajvar were imported mainly from Macedonia (53.0%) and Turkey (15.0%), and again Serbia's share has decreased considerably from 2010.

In 2011 import of **ajvar** was mainly from Macedonia (69.3%) and Austria (8.0%). In 2010 a significant share of the ajvar import came from Serbia, which is not the case in 2011.

Import of **processed tomato** products was mainly from Italy (55.1%) and Macedonia (14.0%). In 2010 the share of China in processed tomato imports was more important than in 2011.

**Processed mushrooms** were imported mainly from China (62.0%) and Macedonia (20.0%), again Serbia's share of such imports has decreased considerably from 2010.

**French fries** (potatoes) were mainly imported from Germany (50.2%), Austria (26.0%) and Poland (13.0%). Serbia was dominant in share of French fries imports in 2010, however in 2011 records show insignificant share of such imports.

In 2011 **potato chips** were imported mainly from Serbia (46.8%), Austria (30.0%) and Turkey (10.0%) while in 2010 Serbia and Croatia had a higher share of potato chips import.

In 2011 **fruit jams** were mainly imported from Macedonia (28.7%), Greece (21.0%) and Serbia (12.0%), while in 2010 Serbia had a higher share of such imports than in 2011.

In 2011 **fruit compotes** were mainly imported from Austria (46.0%), Netherlands (17.6%) and Greece (12%); however in 2010 Croatia and Greece were dominant with the import of this product.

In 2011 **fruit juices** were mainly imported from Austria (34.7%), Slovenia (15.0%) and Serbia (13.0%); again Serbia has a much smaller share of fruit juice imports than in 2010.

In 2011 **concentrates** (mainly fruit) were mostly imported from Macedonia (59.5%), Serbia (12.0%) and Slovenia. In 2010 however Serbia was at a much higher share of concentrates' import.

## 7.2 Export of processed fruit and vegetable products

Below is table 18 with more detailed information on export values for each of the fruit and vegetable processed products during the period 2007-2011.

Products/Years	2007	2008	2009	2010	2011
Cucumbers	7,956	39,513	29,605	45,413	28,890
Pepper	131,885	261,969	106,169	204,312	35,693
Pepper ajvar	90,233	114,584	45,323	112,065	49,839
Tomatoes	114	8,777	1,757	-	-
Mushrooms	545,239	50,599	33,659	49,800	60,563
Potatoes french fries	6,701	675	104,634	51,746	43,166
Potatoes chips	33,238	144,438	33,864	13,985	77,521
Jams	511,089	326,544	219,705	475,963	342,422
Compotes	71,774	197,780	239,864	167,382	164,932
Juices	598,893	1,406,778	910,937	1,514,903	1,241,119
Concentrates	1,065,776	515,908	558,807	393,888	333,517
Other	109,049	50,543	19,063	34,532	381,390
<b>Total values (Euros)</b>	<b>3,171,946</b>	<b>3,118,106</b>	<b>2,303,387</b>	<b>3,063,989</b>	<b>2,859,051</b>
<b>Total quantities (t)</b>	<b>6,894</b>	<b>7,595</b>	<b>5,667</b>	<b>7,712</b>	<b>6,093</b>

- Values of exported **processed cucumbers** have increased during the period considered even though from a low base in 2007. In 2011 quantities of processed cucumbers exported were 29 tonnes, which is less than in 2010.
- The value of **processed pepper** products (excluding ajvar) that have been exported in 2011 was 49 thousand Euros, which is more than the value in 2009, but less than the values of years 2007, 2008 and 2010. This low figure can be attributed to recording of processed pepper exports under the category "other".
- In 2011 about 50 thousand Euros of **ajvar** were exported from Kosovo.
- **Processed tomato** products have only been exported in very low quantities and values during years 2007-2009, and in the 2010-2011 no quantities of processed tomatoes were exported.
- The value of export of **processed mushrooms** has strangely decreased about 10 times between 2007 and 2011. In 2011 the quantity of processed mushrooms exported was only 11 tonnes.
- Export of **French fries** shows fluctuations during the period analyzed. In 2011 export of French fries was 14.6 tonnes much lower quantities than in 2010, but at a similar value as in 2010.

- **Potato chips** exports have increased in value and quantity in 2011 compared with 2010. About 33.3 tonnes of potato chips were exported in 2010. From the data observation there is also some recording of potato chips under the "other" category.
- **Fruit jams** export value has fluctuated very much during the period in consideration with a decrease of 133 thousand Euros in 2011 as compared to 2010. The reason for the change in 2011 is that there is some recording of marmalades in the "other" category.
- **Fruit compotes** export value and quantity are relatively stable in the last 4 years of the period considered. In 2011 fruit compotes exported from Kosovo were about 106 tonnes or 27 tonnes less than in 2010.
- Export values of **fruit juices** and drinks shows an overall increasing tendency during the period analyzed. In 2011 export of fruit juices and drinks reached 3,726 which is more than 1,000 tonnes less than in 2010. Fruit concentrates export values show a highly decreasing tendency during 2007-2011.
- In 2010 the quantity of **concentrates** exported was 923 tonnes.

### 7.2.1 Countries of destination of export for processed fruit and vegetable products

The table below shows main countries of destination for processed products exports in 2011 by value.

Export	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)	Country	% value	value €	qty (t)
Cucumbers	Austria	50.9%	14,710	15	Serbia	49.1%	14,180	15	Others	-	-	-
Pepper	Austria	57.3%	77,754	158	Italy	26.0%	35,427	4	Germany	10.0%	13,365	13
Pepper ajvar	Macedonia	79.4%	39,557	39	Sweden	20.6%	10,276	12	Germany	0.01%	6	15
Tomatoes	-	-	-	-	-	-	-	-	-	-	-	-
Mushrooms	Slovenia	86.4%	52,344	10	Germany	13.6%	8,219	1	Others	-	-	-
Potatoes french fries	Macedonia	100.0%	43,166	15	-	-	-	-	-	-	-	-
Potatoes chips	Albania	49.9%	38,691	16	Germany	30.0%	23,184	11	Macedonia	20.1%	15,646	6
Jams	Macedonia	60.8%	208,087	234	Croatia	17.0%	57,140	37	Hungary	8.0%	28,125	18
Compotes	Croatia	44.7%	73,788	45	Montenegro	27.0%	45,297	30	Romania	10.0%	15,991	12
Juices	Montenegro	45.2%	560,730	1,616	Macedonia	36.0%	453,997	1,321	Albania	9.0%	113,651	448
Concentrates	Macedonia	83.0%	276,911	844	Albania	13.0%	42,609	53	Nigeria	2.0%	6,457	11

Table 19 – Countries of destination of export for processed products exports in 2011 by value

In general Kosovo exports of processed fruit and vegetable products are low in quantity and value, while it is difficult to notice trends year after year, because in most cases countries where these products are exported change every year.

In 2011 **processed cucumber** products were exported mainly to Austria (50.9%) and Serbia (49.1%).

**Processed peppers** were exported to Austria (57.3%), Italy (26.0%) and Germany.

**Ajvar** was mainly exported to Macedonia (79.4%) and Sweden (20.6%).

**Processed mushrooms** were exported to Slovenia (86.4%) and Germany (13.6%).

**French fries** were exported to Macedonia (100.0%).

**Potato chips** were exported to Albania (49.9%), Germany (30.0%) and Macedonia (20.1%).

**Fruit jams** were exported mainly to Macedonia (60.8%), Croatia (17.0%) and Hungary (8.0%).

**Compotes** were mainly exported to Croatia (44.7%), Montenegro (27.0%) and Romania (10.0%).

**Fruit juices** and drinks were mainly exported to Montenegro (45.2%), Macedonia (36.0%) and Albania (9.0%).

**Concentrates** were mainly exported to Macedonia (83.0%) and Albania (13.0%) and this is probably an instance of re-export.

Horticulture Promotion in Kosovo - Prishtinë 2012

