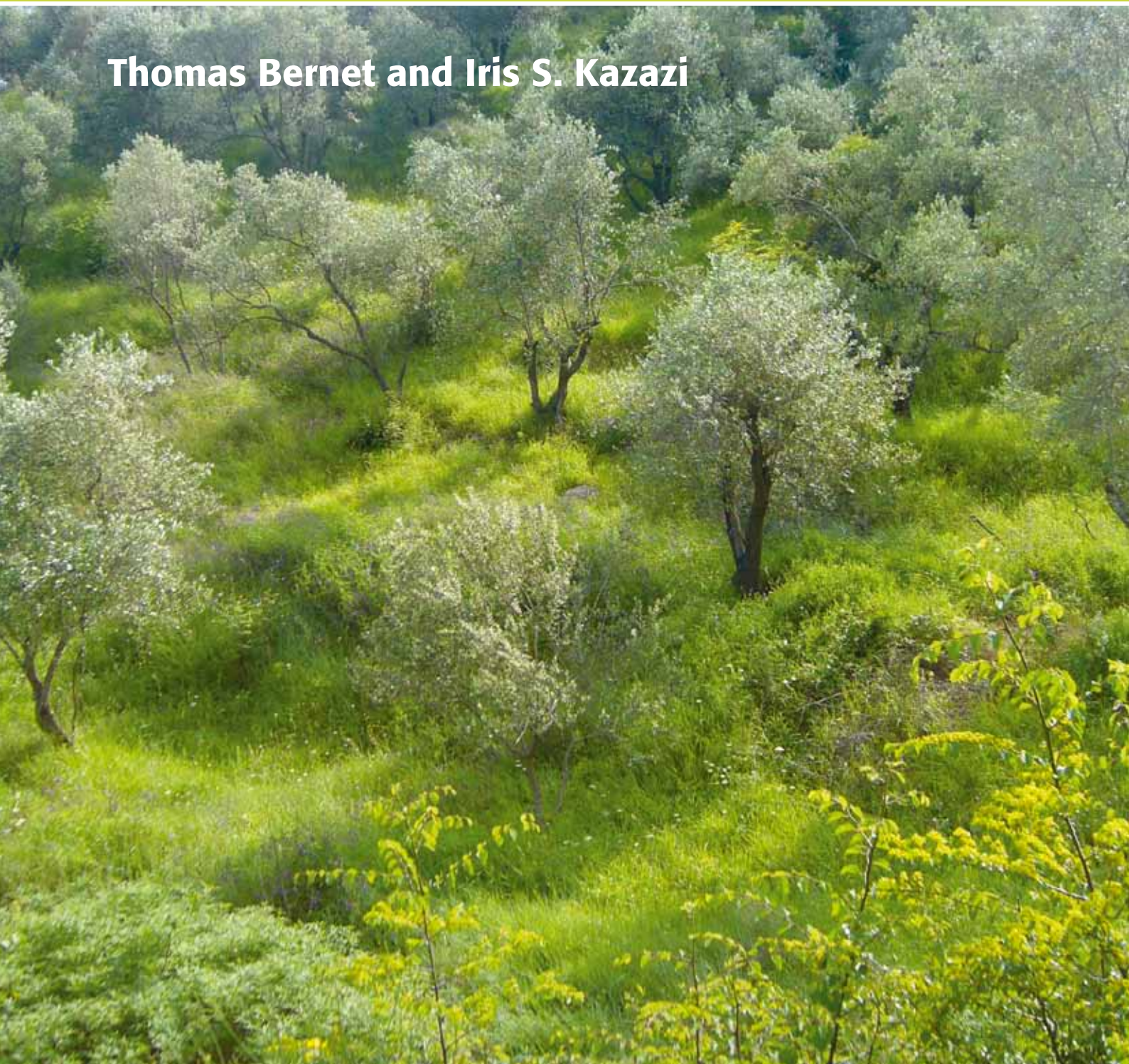


Organic Agriculture in Albania

Sector Study 2011

Thomas Bernet and Iris S. Kazazi



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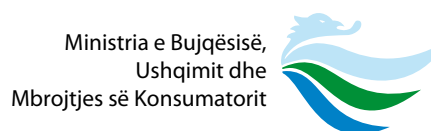
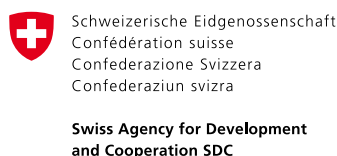
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EXCELLENCE FOR SUSTAINABILITY

Ministria e Bujqësisë,
Ushqimit dhe
Mbrojtjes së Konsumatorit



All information contained in this document has been compiled by the authors with the support of different institutions and persons. Since no systematic data collection is in place yet, and the organic sector in Albania is young and dynamic, the shared information might not be exhaustive. Correspondingly, very important have been the contributions from the following institutions and persons in regard to information sharing and revision of texts:



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Girl of Zus Village, Shkodër



Morning market in Tirana

Foreword

Dear Reader,

Organic agriculture has very positive impacts on the rural economy, generating important income and helping diversify the economic activities in rural areas. Beyond that, organic production promotes healthy food and contributes to environmental protection.



However, the sustainable management of the natural resources represents an important challenge for Albania's agriculture. The future perspective must foresee and develop opportunities and capacities to overcome obstacles related to the organization of producers, market penetration, compliance with the quality standards and sustainable production systems especially in rural areas. In this sense, the modernisation and the competitiveness of Albania's agriculture must remain the focal point of our activities, strongly encouraged from getting the international agreements in place and to further position Albania in the international market. In this sense, the development of the organic sector is an integral part of Albania's EC adhering agenda.

In any case, Albania has favourable assets for organic production. Being a small country with a mountainous relief and a wide range of agro-ecological zones, rural areas have interesting comparative advantages for environmentally-friendly production schemes. It seems that modern organic production will convert a certain backwardness in remote areas in an advantage, considering that agricultural practice in these areas is environmentally sound, based mainly on the use of manpower and not on chemical inputs.

Since the establishment and formalisation of the Organic Agriculture Association in 1997, which started the organic movement, we all have witnessed important changes in the organic sector thanks to valuable contributions of the Swiss government, through the SASA project, the Italian Cooperation, SNV and other entities. In close collaboration with the producers and the ministry I represent, important work was achieved in establishing the production processes and framework conditions needed to make this new sector prosper. For instance, the public extension service has continuously built organic farmers' capacities to improve production know-how and foster direct application of organic principles in the field. Also, already a few years back, different disciplines relating to organic production have been included in the curricula of the Tirana Agricultural University.

Our recent efforts to further improve the legislation on organic production and the support program for organic farmers show the government's commitment to strengthen further the organic sector in Albania. In partnership with private entities, special value chains shall be prioritized to support organic production more strategically through interventions at the level of both agricultural advisors and farmers. Moreover, support is foreseen to improving the data base for organic agriculture and set up an information system to foster organic production and marketing. All in all, all these activities are strongly linked to our conviction that Albania is a country that is not only able to produce organic products at relatively low costs, but that many products have also excellent quality characteristics in regard to taste.

I hope that the information shared in this first sector study on organic agriculture in Albania makes you also believe in the prominent future of organic agriculture in Albania. Let's work together in making this sector prosper, for the benefit of consumers and producers especially from rural areas for whom organic agriculture is a great opportunity to make a sound living!

Sincerely yours

A handwritten signature in blue ink, appearing to read 'Genc Ruli'. The signature is fluid and stylized, with a large initial 'G' and 'R'.

Prof. Dr. Genc Ruli, Minister of MoAFCP



Albanian Alps of Valbonë, Tropojë

Albania – a country full of natural opportunities

With its predominantly mountainous surface of almost 70 percent and nearly 400 kilometers of Mediterranean coastline, Albania is a small country with plenty of opportunities for agricultural production and the collection of a wide range of medicinal and aromatic plants.

Albania has historically been a very isolated country. The long period of communist rule until the early 1990s was followed by political unrest and economic crises. Because access was constrained, very few people from abroad have visited this country and are therefore unaware of the natural diversity that Albania offers.

Favourable climate on the coast

Extending along the Adriatic and Ionian Seas, Albania's coastal areas are the most favourable areas for agricultural production, with fertile soils and relatively good access to the national road system. Most of the country's vegetable production is concentrated in these areas as mild and relatively short winters provide an ideal climate to produce a wide range of vegetables, including off-season for export. Altogether, the small-scale production structures favour vegetable production, where also greenhouses and irrigation are common to improve production conditions.

The coastal area is also interesting for fruit and wine production. While the production of fresh olives and olive oil has a long tradition in Albania and is rather stagnating in terms of surface and production volume, fruit and wine production is growing fast. Overall, the number of fruit trees has increased by more than 80 % since 2000 and production has more than doubled as yields have improved. High productivity increases are also reported for citrus fruit trees. Other fruit crops with steadily growing production include figs, cherries and kaki. The fruit production sector benefits from the fairly low production costs in Albania.

Albania's coast is also important for the fishing industry, yet it is working far below its potential. Since prices in the nearby Greek and Italian markets are much higher than those in Albania, economists predict a fast growing fish sector in the coming years, especially in regard to carp, trout, sea bream, mussels, and crustaceans.

Great natural diversity in mountain areas

Compared to coastal areas, the mountainous areas have a more continental climate, with harsher winters. In the fertile valleys, cereal and potato production prevail, while fruit trees remain an integral element of most production systems. Fruit production is especially important in Korçë – Albania's largest apple producing area.

In the North, at the foot of the Albanian Alps near the border of Kosovo and Montenegro, the most important crop is the chestnut. Thousands of families in this area are involved in the chestnut business.

The mountain areas of Albania are highly relevant for a wide range of medicinal and aromatic plants (MAPs). Most are collected from the wild – generating important seasonal income for thousands of rural families. A big share of MAPs are exported, with Germany, Switzerland, and the United States being the main importers. Using similar logic, wild berries and mushrooms also play an important role.

Table 1-1 Main economic indicators of Albania (2010)

Total Area	28,748 km ²
Population	3,195,000
Rural Population	51%
PPP per capita	7,453 USD
Total Agricultural Surface	697'000 ha
Forests	104'400 ha
Arable Land	584'000 ha
Orchards	60'000 ha
Olive Groves	40'000 ha
Vine Yards	20'000 ha
Pastures	415'000 ha
Farm Average Size	1.2 ha
Employment in Agriculture	58%
GDP Share of Agriculture	21%
Annual Growth Agricultural Production	>3%
Yearly Agricultural Exports to EU (mio €)	25.9
Yearly Agricultural Imports from EU (mio €)	151.6

Organic agriculture – a proposal to foster quality production

The export potential for organic products together with the wish to safeguard the natural production conditions prevailing in Albania has made organic agriculture an important topic since the mid 1990s. As this report will explain in further detail, the initial investments made from different international donors into this sector are now being capitalised on by the Ministry of Agriculture, which has increased its commitment to this sector in recent years. The subsidy payments for organic agriculture, which started in 2008, are increasing from year to year.

In June 2011, as part of the first national organic conference, the Minister of Agriculture reaffirmed the government's will to continue supporting this sector. For 2012, special government support is foreseen to strengthen organic on-farm research and extension, while IPA funds – EU's Instrument for Preaccession Assistance (Albania requested EU membership in 2008) – are likely to support complementary activities that will further boost the devel-

opment of the organic sector. Currently, also the national law on organic production is under revision to adjust it better to current EU regulation.

Promising outlook for Albania's agricultural sector

In contrast to many other European countries, Albania is one of the few countries where the economy has grown continuously during the last couple of years. As important further public and private investments are planned especially for the tourism, construction, and manufacturing sectors and public infrastructure will be further improved, prospects are good that Albania, as a whole, will become more competitive in the coming years. Especially relevant for the development of the agricultural sector will be the improved road system. At the same time, the infrastructural improvements, including the improved coverage of electricity and water in rural areas, will favour additional private investments. This will help to reduce current structural deficiencies in the area of production, processing, and marketing. Thus, it is expected that Albania will substitute increasingly currently high imports. This trend is likely to be even stronger as export dumping especially from Italy and Greece is expected to diminish in the coming years.

A positive sign for a favourable development of the agricultural sector in Albania relates also to the current rapid growth of the retail sector, especially the fast expansion of supermarket outlets. Driven also by consumer preferences for domestic produce, supermarket chains have already started to develop local supply structures to source fresher domestic produce compared to imports. As an illustration, Mercator, a Slovenian supermarket chain present in Albania since 2009, has not only established its own sourcing system for Albanian products, but it has also launched its own export venture for fruits and vegetables. Since 2010, in collaboration with farmers from the Lushnjë region, Mercator has exported more than 700 tons of fruits and vegetables – mainly melons and watermelons – primarily for its own outlets in neighbouring countries.

For the organic sector, prospects are similar or even better. Albania has especially favourable conditions for labour intensive crops, such as: vegetables, medicinal and aromatic plants, mushrooms, chestnuts, and different types of fruits (e.g. berries, figs, cherries, cornel, kaki). Since the salary levels compared to other European countries are much lower, Albania will be in a good position to play a more dominant role in the provision of such organic products, in form of raw material (i.e. ingredients) or processed foods (i.e. branded products).



Box 1-1 Factors influencing Albania's agricultural sector**Basic statistics**

- 90% of all farms in Albania are smaller than 2 hectares.
- 73% of the Albanian labor force is involved in agriculture.
- 12.4% of the Albanian population is poor, and 60% of the poor live in rural areas.

Constraining factors

- Production structures are fragmented and production equipment is deficient.
- Efficient cooperation among farmers is scarce since the collapse of communism.
- Irrigation systems at the community levels have many times ceased to operate.
- The Albanian market has been used in the past as “dumping market”, especially for groceries.
- General lack of understanding how a market economy should function and be developed.

Favoring factors

- Wage levels are low compared to other European countries, especially in rural areas.
- Limited access to agricultural inputs implies a low input agriculture, especially in remote areas.
- Abundant natural resources are available in the country, especially in mountain areas.
- Variety of microclimates and soils, which enable the production of a wide range of crops.
- Relative closeness to the EU market, especially to Italy thanks to good sea ports.
- The ongoing improvements of the road system continuously reduce transportation costs.
- Infrastructural improvements trigger new investments in rural and urban processing facilities.
- Albanian consumer's raising preference to buy domestic products, but of good quality.



Harvesting peppers in Kavaja



AgroPuka fruit processing, Puka

Historical development of the organic sector

Almost 50 years of communism have shaped Albania. This unique heritage is still influencing the thinking of both farmers and consumers and is thus essential to understanding the past and future development trends of the organic sector in Albania.

During Hoxha's communist regime (1944 to 1985), the country faced complete isolation and the main role of the agricultural sector was to feed the population. Access to synthetic fertilizers and other productivity enhancing inputs such as pesticides, seed, and tractors were an integral part of the communist agricultural strategy. Yet, once the communist production structures started to disappear towards the late 1980s, and the land reform started in the early 1990s – the agricultural sector in Albania shifted to a completely different structure.

Subsistence agriculture in the 1990s

Starting in 1991, the land reform aiming to privatize most of the government owned land made it possible within a few years for hundreds of thousands of Albanian citizens to suddenly become land owners and private farmers. For them, this new property – mostly less than 1 hectare – was extremely meaningful as owning land symbolized freedom and independence.

As production, processing, and marketing structures from communist times deteriorated rapidly and the creation of new jobs in the private sector delayed, owning land for cultivation became very important. For most Albanians, with exception of those who migrated, agricultural production became the main strategy to cope with the difficult economic situation. Own labour was invested into agricultural production as income opportunities off-farm were lacking. Since market structures were also not functional at this time, production was mainly consumed within the family. Yet, this “subsistence agriculture” gained even more importance in Northern Albania, as the Kosovo war (1998 to 1999) influenced and hampered the economic development.

With the exception of some coastal farms that started to specialize in the production of a few crops to supply urban markets along the coast, especially Tirana and Durrës, most farms by the end of the 1990s had converted to highly diversified production systems. As labour was abun-

dant, intensive vegetable production went hand in hand with animal husbandry and fruit cultivation. Production was almost completely organic – by default – as outside inputs were not available or too costly to be justified. At the end of the decade, the agricultural sector involved more than 70% of the Albanian population. The urban population also had very strong ties with family members from rural areas who acted mostly as important food suppliers to them.

Because of the importance of agriculture in this difficult economic context, agriculture was clearly recognized to be a key sector to stimulate development and economic growth in Albania. First, productivity improvements in agricultural production would generate important income in rural regions; and second, the agricultural sector, because of involving so many persons, was crucial for successful entrepreneurial development. These two reasons motivated not only the Albanian government to prioritize agriculture in its development plans, but also foreign donor agencies to launch projects in this field.



Traditional soil preparation in Southern Albania

First “organic initiatives” in the late 1990s and early 2000s

The official starting point of the organic movement in Albania relates to the foundation of the Organic Agriculture Association (OAA) in 1997 (see Box 2-1). This association gathered a group of intellectuals aiming to promote organic agriculture in Albania. As part of OAA’s activities, the first farms started to produce according to organic principals. It was this association that was then approached by the Research Institute of Organic Agriculture (FiBL). In 1999, FiBL was mandated by the Swiss Agency for Development and Cooperation (SDC) to assess the situation and propose an agricultural project to enhance the living conditions of the rural population through the introduction of organic production practices. The project that resulted from this initial assessment was the SASA project (Sustainable Agricultural Support in Albania) (see Box 2-2).

In the coming years, the organic movement in Albania grew mainly because of the SASA project. Involving different stakeholders and backed up by the local SDC office in Tirana, SASA was able to quickly bring organic on the agenda of the government. The most important milestone of this partnership with the government was the issuing by 2004 of the Albanian law on “production, processing, certification and marketing of organic products” based on EU regulation 2091/92 and IFOAM standards. In the area of organic extension, in 2005, BioAdria was formed, an association that would specialize in on-farm research and extension.

While the introduction of organic production practices and the development of sound framework conditions were clearly successful, SASA’s main challenge related more to the sustainable development of organic marketing initiatives within Albania. Despite consumers’ preference for naturally produced local products, SASA was not able to create a sustainable market for organic produce. The collection of organic produce from different farms and regions was not only difficult, but also very costly. At the same time the lack of organic retailing hampered consumer awareness work, which was fundamental to motivating consumers to pay a premium for organic produce. The fact was that consumers were confronted with vegetables and fruits on the street market that looked equally fresh!

In contrast, during the same time period, the marketing relating to export developed much better. The first exports of organic olive oil, medicinal and aromatic plants, and dried mushrooms were successful and (re)confirmed Al-

bania’s potential to produce high quality organic produce, especially for export. In the first half of the 2000s, the first international certification bodies had also started to certify organic production in Albania.



Monarda cultivation in the highlands of Tirana

Consolidation of the organic sector in the second part of the 2000s

In 2005, the review of SASA concluded that successful market and value chain development must remain highest priority to consolidate and sustain the created structures and services for this new sector. As a consequence, SASA partnered up with the BioAdria Association, through which the most important services to the sector should be provided, relating to both production and marketing. While BioAdria’s “Production Unit” would introduce and promote important new organic agricultural practices, BioAdria’s “Market Development Unit” would develop new marketing partnerships and promotion activities to improve organic marketing structures within and outside Albania. In the area of certification, SASA’s most relevant contribution was the establishment of Albinspekt in 2006, the first and up to now only national certification body with international recognition.

While the production-oriented work of BioAdria developed well and led to a membership increase of over 100 members in 2008, mainly farmers, the marketing side remained challenging. Organic produce was sold only sporadically from modest farmer owned sales stands, with poor presentation. At this stage, everyone hoped that the breakthrough for organic marketing would happen with the help of Euromax, an Albanian supermarket chain. In the entrance of one of the outlets, a big organic stand was established by BioAdria’s Market Development Unit in collaboration with Euromax staff and a bigger trader. Since the produce was nicely displayed and promoted, sales were excellent. Nevertheless, after 16 weeks the stand

closed as not enough organic produce was available to sustain the stand's supply. The “Euromax experience” was then a turning point in SASA's market development strategy. For the last project phase, organic produce would be marketed and promoted together with typical products from Albania (see Chapter 6).

In respect to organic exports, in collaboration with the Ministry of Agriculture, SNV, and USAID, SASA started to play a key role in coordinating the participation of organic exporters at BioFach Nuremberg since 2006, the most important international fair for organic products. It was this fair that fostered not only organic exports in the coming years, but it also provided key information where exporters should invest to make their business grow. For instance, since 2009, SASA co-financed smaller investments at the level of each exporter based on concrete demands to respond to concrete business opportunities.

In order to work towards more sustainable sector structures, SASA decided in 2009 to make BioAdria become a project-independent association proposing that SASA's technical staff would form a new independent organization, specialized on organic on-farm research and extension. This decision led in 2010 to the creation of the Institute of Organic Agriculture (IOA) in Durrës. Since then,

BioAdria has remained the main association representing organic actors, especially farmers. Under the leadership of the new director, four regional coordinators were nominated for each of the regions where BioAdria is active: Vlorë, Shkoder, Lushnjë, and Tirana-Durrës.

The consolidation of the organic sector in recent years benefited also from an increased interest and commitment from the side of the government to support this sector. Most important in this respect was the establishment of a subsidy scheme for organic agriculture in 2008. Since then, the level of payment and the number of beneficiaries have increased from year to year (see Chapter 4).

In 2011, the Minister of Agriculture nominated a Focal Point for Organic Agriculture to support the coordination work for “organic matters” between the Ministry and outside actors. This person has played a key role in the Organic Conference held in June 2011 and in the implementation of this sector study. In early 2012, the Ministry established also a Governmental Commission for Organic Production, which is responsible for supervising the legislation and its implementation from the government's point of view. Currently, this Commission is revising the national organic law to adjust it better to the current EU regulation.



Olive groves outside of Tirana

Box 2-1 Relevant Early Initiatives for the Development of Organic Agriculture in Albania

- 1992 Oxfam enters Albania and starts a project in Northern Albania promoting permaculture, i.e. intensive diversified production systems to enhance self-sufficiency of small-scale farmers. The project's extension system reaches 30 villages in the region of Shllak, establishing water reservoirs and introducing mulching and organic fertilization practices (e.g. green manure "Konfrej"). Training takes place on the farms and on a model farm near Shkoder, where up to 20 people per months are trained during the summer.
- 1995 HIPP, a German producer of organic baby food, expands its international sales to Albania where they capture around 5% of the baby food market. However, it seems that the main reason why the product is bought is not because it is organic, but the fact that buyers trust German quality. There are still in the Albanian Market but with it is likely with less market share.
- 1997 The Organic Agriculture Association (OAA) is formed, an association that aims to promote organic agriculture in Albania. With strong leadership from intellectual leaders, especially relating to the Agricultural University in Tirana, the association has important influence on both farmers interested in organic farming and policy makers. With the support from international donors, OAA manages different projects in rural areas.
- 1998 The Ministry of Agriculture issues the "Green Strategy" document, which explicitly encourages organic agriculture among other income enhancing measures in agriculture.
- 1999 After 6 years of exporting conventional herbs, the company Agris-Frucht starts to export certified organic fresh culinary herbs to Switzerland.
- 1999 The first organic shop in Tirana is opened by a board member of OAA. It is also mentioned in the "Lonely Planet" travel guide as one of the shops that should be visited in Tirana.
- 2000 UNDP supports OAA to implemented the project "Biodiversity and the practices of organic agriculture in the area of Kurvelesh i Siperm".
- 2000 USAID supports the conference "Organic Agriculture - a Challenge to the Albanian Agriculture" organised by OAA in cooperation with the Agricultural University of Tirana.
- 2001 Avalon foundation from Netherlands starts with OAA the project „Introduction of Organic Agriculture and Low Input Sustainable Agriculture in South Eastern Europe".
- 2001 The Sustainable Agriculture Support in Albania (SASA) project starts, implemented by FiBL in collaboration with OAA.
- 2003 First foreign certification bodies start to do inspections in Albania.
- 2004 The first national law on organic is approved.
- 2004 GTZ in collaboration with OAA organises a 5-day seminar with the topic "Promotion of Organic Agriculture in the Balkans".
- 2004 Organically and fairtrade certified extra virgin olive oil from Shpresa Shkalla is sold in Claro Fairtrade retail shops in Switzerland.
- 2005 Shpresa Shkalla's organic olive oil wins the most important international award for olive oils – Biol - Premio Internazionale di Città di Andria (see www.premiobiol.it).
- 2006 BioAdria Association is founded, becoming the new implementing local partner of the SASA Project.
- 2006 Albinspekt, the first and only national certification body is established.
- 2007 Albania participates for the first time with its own stand at Biofach.
- 2007 The MoAFCP launches National Action Plan for Organic Agriculture.
- 2008 The MoAFCP introduces a special subsidy scheme for organic production.
- 2008 A successful organic sales stand was piloted within one of outlets of the Euromax supermarket. But because of insufficient supply, the stand closes after 16 weeks.
- 2009 SNV supports Albania's medicinal herbs industry and the Biofach participation of organic exporters.
- 2010 The Institute of Organic Agriculture (IOA) is formed, based in Durrës.
- 2010 The BioAdria Association nominates four regional coordinators to strengthen its activities in the main regions: Vlorë, Shkoder, Lushnjë, and Tirana-Durrës.
- 2011 A big national conference on organic agriculture is held, with more than 200 participants.
- 2011 The healthy corner in Mercator's biggest outlet is opened, selling organic products together with typical products from Albania.
- 2011 Different retail outlets and restaurants selling and promoting organic products together with typical products start to operate in: Vlorë, Shkoder, Durrës, and Tirana.
- 2012 The national organic law is adjusted to the EU regulation.
- 2012 The Swiss Import Promotion Program (SIPPO) starts to support the participation of organic exporters from Albania at BioFach in Nuremberg.

Box 2-2 Overview of the Sustainable Agriculture Support in Albania (SASA) Project

Since the beginning of its activities in Albania in the early 1990s, the Swiss Agency for Development and Cooperation (SDC) had prioritized the agricultural sector in Albania for its crucial role in helping to foster the country's progress. Based on two fact finding missions in the late 1990s, SDC contracted the Research Institute of Organic Agriculture (FiBL) based in Switzerland to promote the concept of "low external input agriculture" (LEIA). In collaboration with the Albanian Organic Agriculture Association (OAA), a project started in 2001 that would promote "environmentally sound and productivity enhancing agricultural practices". The main objective of this new project was to enhance income of Albanian farmers through sustainable agriculture.

After having obtained good initial results on the production side, SASA made an important shift in 2003. Based on the recommendations from external reviewers to focus more on value addition opportunities, SASA started to expand its activities and include also more strongly processing and marketing activities. This change implied that the project started to focus on market opportunities that involved organic certification. Therefore, SASA became a key player in helping to develop sound framework conditions for the organic sector. In this sense, besides promoting organic agricultural practices in different parts of the country, SASA played a key role in developing the first Albanian law on organic agriculture in 2004 and with the creation of Albin-spekt, in 2006, a local certification body with international recognition.

While organic export opportunities had grown steadily over the years, mainly relating to medicinal and aromatic plants and organic olive oil, SASA faced difficulties to develop organic marketing structures within Albania. The scattered production, mostly seasonal, implied high transportation and marketing costs. Moreover, consumers' limited awareness and willingness to pay for organic hampered this market development work.

In this context, it was decided that SASA would partner up with the BioAdria Association, founded in 2006, through which the needed market development services would be developed in parallel to the production-oriented services. In practice, different production and marketing specialists were placed into BioAdria to work at the same time on both sides. The successful sales of organic products in Euromax, in 2008, however, proved again how difficult successful market creation was at this stage.

Because of the continuing market development difficulties, the last project phase of SASA, lasting from 2009 to 2011, reemphasized the need for successful organic market and business development. The fact was that the established structures and services for the organic sector could only be maintained over time if the sector would grow and generate its own income to cover the costs of these services. Up to that date, SASA meaningfully supported certification and organic inputs to farmers, taking into consideration that the financial support from the side of the Ministry up to that stage was very small. In order to broaden the scope for market development, especially within Albania, SASA started to expand the range of products in 2009 also non-organic traditional products, for which a new standard was created (see Box 6-1). Two corresponding regional labels were developed, one for products originating from the North, and one for products from the South. SASA's new strategy therefore was to promote and sell organic products in outlets that would also sell typical products from northern and southern Albania. The new outlets for organic and typical products included Mercator's City Park outlet near Tirana, a branded sales van launched as "Mobile Food Shop" (see Box 3-2), smaller retail outlets in Vlorë, Shkoder, Durrës, and Tirana, and sales points of restaurants that were supported to sell and promote typical Albanian food. Since both outlets and producers have been very successful in capturing the attention of both media and consumers, the prospects are good that the demand for these products will grow further and stronger in the near future (Chapter 6).

In regard to organic production, since 2009 SASA aimed to create an institutional setup that would ensure that most important services to the sector would still be provided to actors beyond the end of the project (December 2011). Thus, SASA supported the idea that the three technical staff within BioAdria (financed by SASA) would form a new organisation in 2010, the Institute of Organic Agriculture (IOA). With headquarters in Durrës, this new entity would specialize in organic on-farm research and extension, working closely with the public extension system and the Agricultural University of Tirana. This strategic decision implied that also the BioAdria Association would also become a more project independent, bottom-up driven association where members themselves, mainly farmers, would get more decision power.

In respect to sector services and promotion, during 2011, SASA supported also the publication of the Positive Input List through Albin-spekt, and organized with project partners and the Ministry of Agriculture an important Organic Conference in Albania. The good participation, with around 200 actors, and the good media coverage showed again the great interest that exists for organic agriculture in Albania. A last activity of SASA relates then to the development and publication of this document, the first sector study on organic agriculture relating to Albania.



Organic olive producer group of Zus Village, Shkoder

Actors involved in the organic sector

The organic sector in Albania is relatively young and dynamic. A good understanding of the roles and capacities of the different actors is essential to understanding how this sector is likely to evolve in the future.

In general, actors can be grouped into three different groups (see Figure 3-1): (1) market chain actors, who are directly involved in the production and marketing processes of organic produce, (2) private service providers, who support market chain actors with different types of services, and (3) policy makers, who promote the sector with different government support measures.

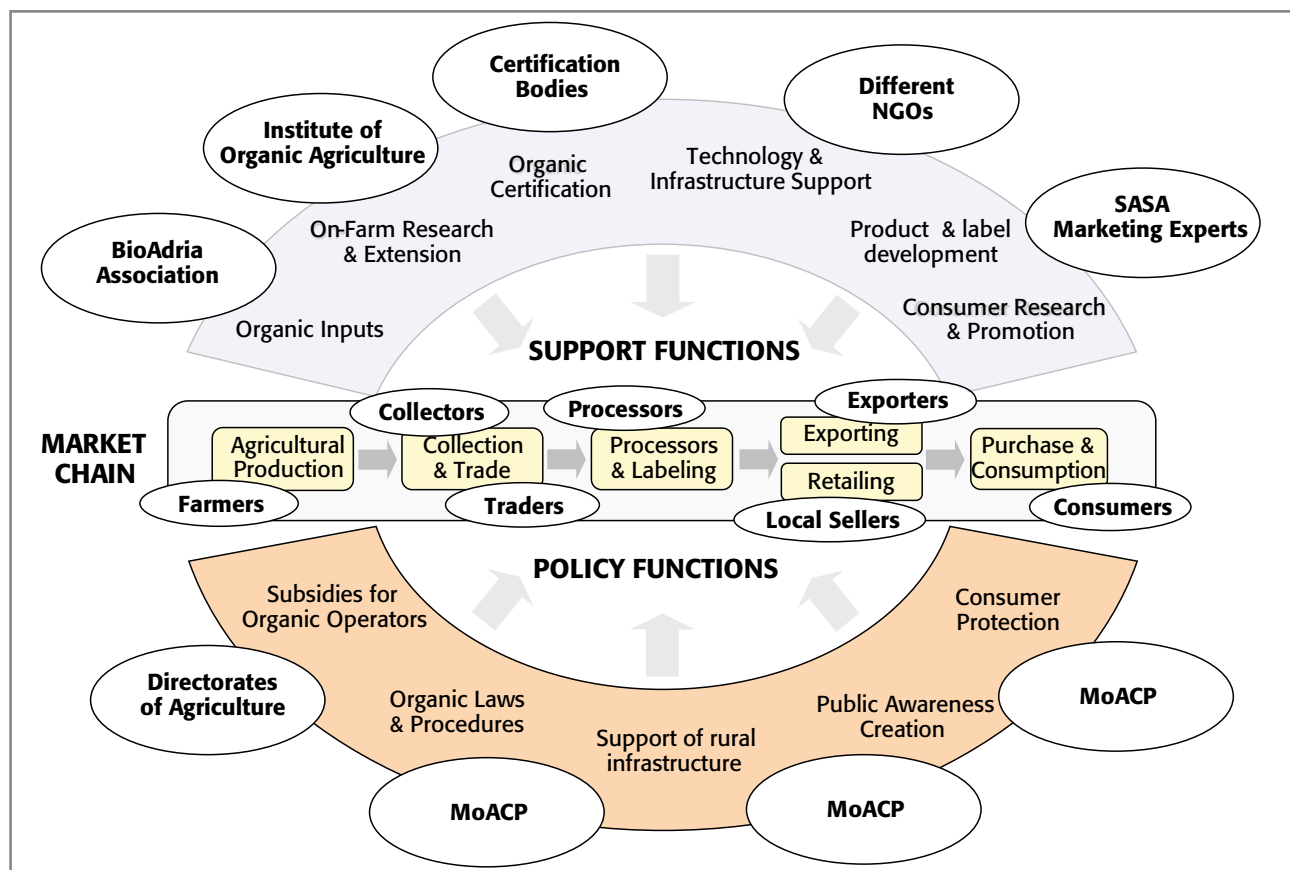
Market chain actors relate to those actors who collaborate together in the production and marketing of organic products. This group of actors mainly involves: farmers, collectors, traders, processors, retailers, exporters, and consumers. Since production and marketing varies from crop to crop, depending much if they are processed and

how they are traded and sold, the role and responsibility of the different actors varies from case to case. Nonetheless, the most important tendencies are described below to understand the main roles the different actors currently play in the organic sector.

Important production and marketing functions of farmers for the domestic market

For those crops and products that mainly are marketed within Albania – such as fresh vegetables and fruits, wine, and olive oil – farmers and farmer groups, both formal (i.e. associations) and informal (i.e. collaborating neighbours), play an important role. The small production volumes imply that farmers themselves not only get involved in pro-

Figure 3-1 Overview of actors involved in the organic sector in Albania



duction and collection but also in trading and marketing activities. In this sense, it is common that farmers, alone or in collaboration with neighbours, are also involved in processing and/or retailing activities. The first is especially true for olive oil and wine, the latter for fresh fruits and vegetables.

Overall, the fact is that the market for organic products is still very small, seasonal, fragmented, and quite personalized. This hampers the involvement of traders and retailers, whose business logic is based on bigger volumes and permanent supply, during the whole year. For instance, in the Durrës area, one organic vegetable farmer is also assuming the role of a collector, trader, and retailer, and has a sales stand in the Durrës wholesale market. In Vlorë, Shkoder, and Tirana, organic vegetable producers cooper-

ate closely with retail shops and restaurant owners to ensure frequent deliveries (see Chapter 6). As an illustration, Table 3-1 mentions the most important organic farmers present in Albania, all being involved in important processing and trading activities besides production.

Few companies shape the organic export market

Currently, the export market for organic produce from Albania relates very strongly to natural resources that are grown and collected in rural areas of the country. Most important are medicinal and aromatic plants (MAPs), mushrooms, chestnuts, and wild collected fruits (Chapter 6). These crops relate to the 250'000 hectares of organically certified land for wild collection, involving thousands of collectors in different rural areas. Through middlemen, these actors are then linked with a few companies,

Table 3-1 Most relevant actors for the domestic organic market

Actor	Location	Main Organic Products
Mujo Tokaj	Shtoj, Shkoder	Strawberries
Zeke Deda	Velipoje, Shkoder	Pears, grape etc
Mark Gjoni – “Dalmacia sh.p.k”	Puka	Cornel juice
Liri Sila – ferma “Sila”	FusheKruje, Tirane	Salads, tomatoes, different spices
Shpresa Shkalla	Lunder, Tirane	Organic olive oil, St John Wart olive oil
Agim Pudja – “Tomadhea”	Tirane	Mushrooms, mentha
Reshit Hoxha	Kashar, Tirane	Cucumber, tomatoes, green bean, spinach
Lindita Kuci	Marikaj, Durrës	Different vegetables and fruits
Ardian Dardha	Ndroq Tirane	Different vegetables and fruits
Arben Islami	Vore	Different salads and herbs
Enver Aliu, Enisa Cantine	Durrës	Wine
Enver Duka, Duka Cantine	Durrës	Wine
Tofik Balla	Pjesez, Shijak	Wine, organic pears, grape
Vesaf Musaj, “Musaj Olive Oil”	Vlore	Organic olive oil, organic grape
Hair Xhafaj	Vlore	Organic grape, wine etc
Farmer group Llakatund	Vlore	Different salads and winter vegetables
Fatmir Kallbaqi	Durrës	Different organic vegetables
Holta Cantine	Gramsh	Wine
Vath Dedja	Romanat, Durrës	Different vegetables and fruits

Source: Albanian Association of Marketing, 2011 (own research)

Table 3-2 Main organic exporting companies located in Albania

Company	Location	Main Organic Products	Main Export Markets
Xherdo	Maminas	Medicinal herbs, essential oils	Europe, USA
AMLA	Tropoja	Chestnuts	Europe
Tomadhea	Tirana	Special herbs, mushrooms, medicinal herbs	Europe, Canada, Balkan
Elite AE	Tirana	Plant products, fresh spices	Europe
Shkalla SH	Tirana	Olive oil	Europe
ATC	Durres	Wild collection species, processed food	Europe, USA
ERBA	Shkoder	Plant products, wild collection, processed food	Europe
Albfrut 2005	Pogradec	Plant products, wild collection species	Europe
Elba Shehu	Elbasan	Plant products, wild collection species	Europe, USA
Dalmacia	Puke	Cornel juice	Turkey
Musaj shpk	Vlore	Olive oil	Switzerland

Source: Albanian Association of Marketing, 2011 (own research)

who then process this raw material and export it as final or semi-final product (i.e. ingredients for food and cosmetic industry). The clients of these companies are mostly importing companies from different European countries, specialized either on trading of organic ingredients or have a processing line for final products. A special export opportunity relates to organic olives, where currently two Albanian companies are involved, with exports mainly to Switzerland.

Recently, different exporting companies have also tried to start marketing part of their products in the domestic market. From a strategic point of view, most important has been the outlet in the duty free area of Tirana's Airport. This shop acts like a "vitrine" for different products with export potential. The shop currently sells different organic products, like olive oil, tea mixtures, and dried mushrooms. Table 3-2 presents the most important processing and exporting companies based in Albania.

Most important service providers in the organic sector

The service provision to the organic sector in Albania has a strong relationship with the Swiss funded SASA project (see Box 2-2). With the exception of the Organic Agriculture Association (OAA), funded in 1997, the most relevant service providers that are currently present in the organic sector have somehow a direct relationship with SASA (see Table 3-4).

In regard to support of organic farmers, BioAdria (see Box 3-1) and the Institute of Organic Agriculture (IOA) (see Box 3-2) are certainly the two most important service providers. BioAdria's main services relate to support members in getting access to relevant information (e.g. organic practices, certification procedures, and govern-

ment subsidies), organic inputs, and sales points. Since 2010, these services are mainly provided at the level of the four regions where BioAdria is currently active: Tirana-Durrës, Vlorë, Shkoder, and Lushnjë (see Chapter 4).

Since the provision of technical advice for organic farming is still limited from the side of the public extension system, this specialized service is mainly covered by the Institute of Organic Agriculture (IOA) based in Durrës. The good technical expertise, the sector knowledge and the good relationships to BioAdria management and members imply a very functional collaboration and sharing of information. Some BioAdria farms, for instance, serve as "model farms" where IOA tests new organic practices and inputs on-farm. These farms serve then as ideal "show cases" to illustrate best organic practices. Since 2011, IOA has started a seed multiplication project to make more resistant varieties accessible to farmers tending towards organic agriculture.

In regard to organic certification, Albania is well covered. Besides Albinspekt (see Box 3-3), being the only Albanian certification body with international recognition, seven foreign certifying bodies operate in Albania, exclusively for export: ICEA, BCS Öko-Garantie GmbH, BioInspecta AG, CERES GmbH, Control Union Certifications B.V., IMO CH, and IMC srl. Since Albinspekt is the only inspection body that has requested and received the authorization to certify according to the national law (Law No9199) – which is binding for national subsidy payments – more than 90 % of all organic operators are certified by Albinspekt. The advantage of Albinspekt is that they have their own office with a qualified team of local professionals, giving them a local knowledge advantage, allowing them to better adapt to the specific circumstances in Albania.



Albania's country stand at BioFach 2010 in Nuremberg, Germany

MoAFCP's main role to define and implement organic policy measures

In regard to policy and governmental support measures for the organic sector, it is the Ministry of Agriculture, Food, and Consumer Protection (MoAFCP) that assumes full responsibility. For the legislative part, to ensure that procedures are optimally implemented, the MoAFCP has formed in 2006 the Governmental Commission of Organic Production. In addition, the MoAFCP is responsible to provide direct support measures for organic operators. A corresponding subsidy scheme is in place since 2008. The regional offices at the district level are responsible to handle the administrative procedures relating to these subsidy payments (see Chapter 4).

At a higher level, through its headquarters, the MoAFCP supports also different types of promotion activities. Most relevant is the co-financing of the participation of Albanian exhibitors at BioFach in Nuremberg. In 2011, in collaboration with SASA, the MoAFCP has implemented a big organic conference. From 2012 onwards, MoAFCP will also be supporting the Institute of Organic Agriculture (IOA) in Durrës to foster the expertise in organic agriculture in Albania.

Table 3-3 Development of organically certified actors, by category

	2006	2007	2008	2009	2010
Primary Producers	30	40	43	31	110
Processors	3	3	4	5	25
Collectors	2	2	3	6	20
Exporters	2	2	4	7	18
Total Operators	34	45	49	38	137

Source: Albinspekt, own research

Table 3-4 Main actors providing relevant services to the organic sector

Actor	Legal Status	Main Services	Box
BioAdria Association	Association	Access to information for members, lobbying	3-1
Institute of Organic Agriculture (IOA)	Non-Profit Center	Extension, on-farm research, seed multiplication, monitoring of key diseases, documentation	3-2
Albinspekt	Company	Inspection, certification, research, documentation	3-3
Albanian Association of Marketing (AAM)	Association	Marketing support, label design, consumer research, event management	7-1

Box 3-1 BioAdria – the main stakeholder platform of organic actors in Albania

Before 2006, BioAdria was a branch of OAA (Organic Association of Albania). Its initial purpose was to assist organic farmers from the seaside regions (i.e. Durrës, Ishem, Divjaka) in organic production practices and support their marketing activities. In 2006, however, BioAdria became an own legal association. This was the moment when it became the local implementing partner of the SASA project (see Box 2-2). With staff financed by SASA, BioAdria became quickly the main driving force to help develop the organic sector, with two entities: (a) the "Production Unit", focusing on on-farm research and organic extension, and (b) the "Market Development Unit", aiming to develop and implement organic marketing initiatives in collaboration with farmers, traders, and retailers, and promoting organic exports mainly through coordinating the participation of organic exporters at Biofach.



Thanks to SASA funding, BioAdria was able to involve dozens of farmers and motivate them to shift towards organic agriculture. Free access to valuable on-farm extension coupled with subsidies for organic inputs and certification was a clear incentive for farmers to join BioAdria in its early stage. Already in 2008, BioAdria had around 100 members, mainly farmers. Despite the reduced support from 2009 onwards, when SASA underwent important changes aiming to guarantee the sustainability of the most important sector services developed by the project (i.e. formation of IOA out of previous SASA staff placed within BioAdria), the association maintained its strength in terms of members. The association grew even further – to 130 members in 2012 – boosted mainly by the positive developments from the government, since they started to subsidize organic farming from 2008 onwards.

Since 2010, BioAdria has started to strengthen its activities within the four regions where most members originate: Tirana-Durrës, Vlorë, Shkoder, and Lushnjë. For each of these regions, a regional coordinator was nominated to coordinate activities with actors involved in each region. Most important in this regard is the coordination and provision of organic inputs (i.e. not many organic inputs are available) and the sharing of relevant information in relation to certification procedures, access to subsidies, disease management, fertilization, etc. To overcome this challenge, BioAdria has taken the initiative to import certain key inputs that are now being sold mainly through two new sales points owned by its members, one in Vlorë, and one in Dushk.

Box 3-2 Institute of Organic Agriculture (IOA) – promoting sustainable agricultural production with specialized services



The Institute of Organic Agriculture (IOA) was funded in 2010 as a non-profit organization to promote environmentally friendly agricultural technologies and support the development of the organic sector. IOA has a pool of three full time experts in the head offices, in Durrës, and two part-time experts in the local offices in the regions of Vlorë and Shkoder. Its expertise is especially strong related to plant protection and vegetable and fruit production.

IOA covers a wide range of activities in line with its objective, including on-farm research & extension, farmer training, scientific studies related to organic and integrated agricultural practices, seed multiplication of resistant apple and grape varieties, and publications of technical brochures. A special activity relates to the establishment and testing of an electronic weather station to monitor and forecast diseases and use this tool to reduce farmers' sprayings especially in fruit production. Different activities are conducted in close collaboration with BioAdria farmers and students from the Agrarian University of Tirana. In 2011, IOA has produced different manuals on organic production for: vegetables, apples, olives, and grapes.

Activities implemented by IOA are supported by development projects and private actors who are interested in testing commercial inputs and technologies under Albanian conditions. Up to 2011, the SASA project has provided important support. From 2012 onwards, also the Ministry of Agricultural will be supporting IOA.

For more information, see www.ibb.al.

Box 3-3 Albinspekt – the first and only local certification body in Albania



Albinspekt was established in November 2006 with the support of the Swiss government as part of the SASA Project. Legally it is a non-governmental organization – centre for inspection/certification. Albinspekt's mission is the development of certification services and structures to boost the production and commercialization of agricultural quality products from Albania.

Albinspekt is offering inspection and certification for the national and international market. Albinspekt is the only certification body that has received the approval to certify according to the national law (Law No9199) – to which the payments of government subsidies are linked. For international certification, since 2007, Albinspekt is accredited by the German accreditation body DAkkS (Deutsche Akkreditierungsstelle GmbH).

Albinspekt provides a broad range of services in Albania and Kosovo related the following standards (partially in collaboration with international partners):

- EU Regulation 834/2007 (for exports to EU countries)
- Albanian Law on Organic Agriculture (for government subsidies) and BioAdria Private Standard on Organic Agriculture in Albania (for BioAdria label on products)
- BioSuisse – Private Standard on Organic Agriculture in Switzerland
- NOP – National Organic Program of the U.S.
- GLOBAL GAP – Standard for the integrated safety in Agriculture
- ISO 9001:2008 – Standard for the Quality Management Systems
- HALAL – Food quality standard.

Albinspekt further offers information and trainings on control procedures and requirements for all mentioned standards and providing training and consultancy services related to quality assurance systems (e.g. HACCP, ISO) and origin of sourcing (e.g. PDO, PGI). Albinspekt is also responsible to update and publish the Positive List for Organic Inputs.

For more information see www.albinspekt.com.



Stand of BioAdria in KASH Fair 2010 in Tirana

Organic regulation and support policy

Policy support for organic farming in Albania is still in an initial phase. The organic legislation of Albania, dating back to 2004, is currently under revision for alignment with the EU regulation.

Although there is an organic legislation in Albania since 2004, it took a few years to implement it. A crucial year was 2007, when the Albanian government recognized the potential of organic agriculture for a sustainable and prosperous development of Albania's agriculture sector as part of the national strategy. The government's growing interest for organic agriculture is reflected in the recent introduction of support measures mainly for organic farmers.

First Albanian law on organic agriculture

The People Assembly of the Republic of Albania adopted the Law on the Production, Processing, Certification and Marketing of "Bio" Products on 26.02.2004 (Law No9199). The initial law was in large part aligned with the EU Regulation 2092/91 on organic production of agricultural products. In 2005, the Council of Ministers assigned the State Commission for Organic Production with important tasks to build up this new sector. As an inter-institutional body comprised of members of different directories of the Ministry of Agriculture, Food and Consumer Production (MoAFCP) as well as other ministries, the Agricultural University, and two representatives from the private sector, this entity had the following main tasks:

- to approve and monitor national and foreign inspection and certification bodies
- to ensure registration of organic inspectors
- to coordinate registration of farmers involved in organic certification
- to maintain a database of all organic operators
- to support the implementation of the organic control system

Government support measures targeting organic agriculture

In 2007, the Ministry of Agriculture, Food and Consumer Protection (MoAFCP) launched two important documents shaping the future of agriculture within Albania: the Inter-Sectorial Rural Development Strategy (2007–2013), and the Sector Strategy for Agriculture and Food (2007–2013). These documents present the main objectives and directions of agriculture and rural development in Albania, where for the first time organic agriculture was

explicitly mentioned as an important approach to foster the sustainability and the competitiveness of Albania's agricultural sector.

Additionally, aiming to strengthen the organic sector development, with the support of the Mediterranean Agronomic Institute of Bari, the MoAFCP further developed and launched in 2007 the National Action Plan for Organic Agriculture. Part of this document was an explicit assessment of the organic sector (see Figure 4-1). This document represented an important first step, paving the way to obtain public support for organic agriculture in Albania, despite the fact that different activities mentioned in that action plan were not implemented as planned.

The most obvious support for organic agriculture was the implementation of a subsidy scheme for organic farmers in 2008. However, the lack of structures to allocate these subsidies, the unclear and complicate procedures, and the relatively small amounts per farm hampered the efficiency of this new measure. The subsidies related to 50% of the certification costs, or a maximum per farm of 6'000 Lek (45 EUR) not producing for export. Although these support payments were appreciated by those who were farming organically – especially as a positive sign from the side of the government – the level of payment had no or very little effect on farmers to convert towards organic. However, since this subsidy scheme has improved considerably in recent years, in terms of procedures and payments (see Table 4-1), it has become a driving element for farmers to get involved in organic agriculture. For instance, in 2011, the subsidy support per farm was fixed to 70.000 Lek/farm (equal to 500 EUR), supporting the farms in general and not only co-financing the certification costs.

As this level of payment is a good incentive for small-scale farmers who already produce without synthetic inputs, conversion to organic has become a viable option despite the limited market demand and marketing structures in place to reward organic producers with a higher price. In this sense, the higher subsidy levels since 2010 explain the strong increase of organic farms in Albania (see Table 5-1). Operationally, organic certified operators, including

those who intend to convert to organic, should apply to the Directorate of Agriculture in districts to get subsidies. Farmers being members of BioAdria receive important guidance and support on how to access these subsidies.

In regard to promotion, the MoAFCP has contributed with special funds to the participation of organic exporters at Biofach. Yet, such support does not relate to an official support policy within the Ministry. The decision for such support is taken each year.

Recent adjustment of the Albanian organic law to the European organic standard

In 2011, the MoAFCP decided to revise the Albanian legislation for alignment with EU Regulation 834/2007, the

new EU regulation on organic production and labelling of organic products that was enforced in the EU in 2009. The revision shall be done in two steps: firstly the horizontal law (basic regulation equivalent to EU Regulation 834/2007) shall be finalized and adopted within the first half year in 2012. Within 12 months after adoption of the horizontal law, the implementation rules equivalent to EU Regulation 889/2008 shall be elaborated. The horizontal law will outline the legal framework and define the principles and objectives of organic agriculture as well as the control system while the implementation rules will define the details of the production, processing and labelling rules. A working group comprising of organic stakeholders and representatives of the ministry was assigned for the revision of this legislation

Table 4-1 Overview of the development of government subsidies for organic farms

Year	Type and Level of Support per Farm
2008	50% of the certification costs, but not more than (a) 6.000 Lek (=45 EUR) for domestic production, and (b) 70.000 Lek (=500 EUR) for export.
2009	50% of the certification costs, but not more than (a) 20.000 Lek (=150 EUR) for domestic production, and (b) 70.000 Lek (=500 EUR) for export.
2010	Fixed amount for all farms: 50.000 Lek (= 375 EUR).
2011	Fixed amount for all farms: 70.000 Lek (= 500 EUR).

Source: MoACFP



Farm visit of SASA staff on an organic farm near Tirana

Figure 4-1 SWOT Analysis of the organic sector in 2006

STRENGTHS
<ul style="list-style-type: none"> • Many Albanian agricultural productions are intrinsically and de facto organic. • Diversified organic production (due to the lack of agricultural specialisation in Albanian agriculture). • Existence of valuable pioneer experiences and human resources in the organic field. • Various on-going projects and initiatives (funded by foreign donors) supporting the development of the organic sector. • Existence of some success stories in the market of organic products and foodstuffs. • Natural and promising links between organic and typical products. • Strong political will to support the development of the sector (which, inter alia, recently led to the approval of the first national regulation on organic agriculture).
WEAKNESSES
<ul style="list-style-type: none"> • Structural deficiencies in the Albanian agricultural sector (i.e. small-sized farms, small-scale production, poor economic and social infrastructure, conflicts on land rights). • Organic initiatives strongly depend on foreign projects and funding. • Poor cooperation among organic actors. • Difficult access to organic inputs. • No direct support measures for organic agriculture. • No premium prices for organic products. • Poor domestic and international market development. • No clear vision about the prospects of organic agriculture. • Diverging opinions about the role of public and private structures in the development of the sector (inspection and extension services). • Poor appeal of ideological/philosophical aspects of organic agriculture as well as of its environmental benefits.
OPPORTUNITIES
<ul style="list-style-type: none"> • Potential for domestic market development linked to: <ul style="list-style-type: none"> - tourism development - existence of a large international community - expansion of supermarkets in Albania • Changing tastes and behaviour of Albanian consumers: growing interest in traditional typical products and food safety. • Albania's natural image and favourable location for high quality products. • Cleaner rural environment due to policies of a decentralised economy. • Increasing international donors' interest in sustainable agriculture initiatives. • Possible synergies with rural development policies and programmes, especially in rural and less competitive areas. • Increased exposure of the Albanian organic community to experiences from neighbouring countries. • Increasing capacity of Albanian agri-food enterprises to comply with international standards.
THREATS
<ul style="list-style-type: none"> • Lack of resources to allocate for the development of the organic sector. • Lack of cooperation between Ministries in charge of the design and implementation of the different policies. • Conflicts with GMO supporters. • Poor consumer education on and awareness of food quality issues. • Low food self-sufficiency and increasing food trade balance deficit.

Source: MoAFCP 2006. *Towards an Action Plan to develop Organic Agriculture in Albania, Annex 1.*



Organic tomatoes grown in a green house near Lushnjë

Organic production – the current situation

Because organic agriculture is still a new concept in Albania, certified organic production relates mainly to specific export opportunities and growing niches in the domestic market. However, the number of farms converting to organic agriculture is growing fast, an indication that both producers and consumers are rapidly changing this situation.

In order to understand the dynamics of the organic sector, the current production situation and development trends must be differentiated by regions, crops, and market opportunities. Especially relevant to differentiate is production for domestic consumption versus export. Yet, the lack of detailed data on organic operators hinders a detailed analysis.

Recent fast growth of organic operators

As described in more detail in Chapter 3, Albania's organic sector involves a range of different actors that many times comply with different functions in the organic market chain: production, collection, processing, trading, and retailing. Thanks to the introduction of the subsidy scheme for organic producers and the growing export opportunities, the number of organically certified actors has increased dramatically recently (see Table 5-1).

The location of organic actors is spread across the country, but with a clear concentration in certain regions (Figure 5-1). There are two main reasons for that: first, the regional focus of the BioAdria Association's activities (see Box 3-1)

and, second, the geographical differences in regard to the production of different types of organic crops. However, since those organic operators that relate to wild collection are relatively few and relate to companies that tend to have their processing companies in urban centres, including Tirana, the physical location of the operator does not say much about the origin of the organic produce. The fact is that the 250'000 hectares of organically certified wild collection (see Table 5-1) relate mainly to mountain areas, which seem underrepresented when only taking into account the physical location of the organic operators.

Specialization of organic production by regions

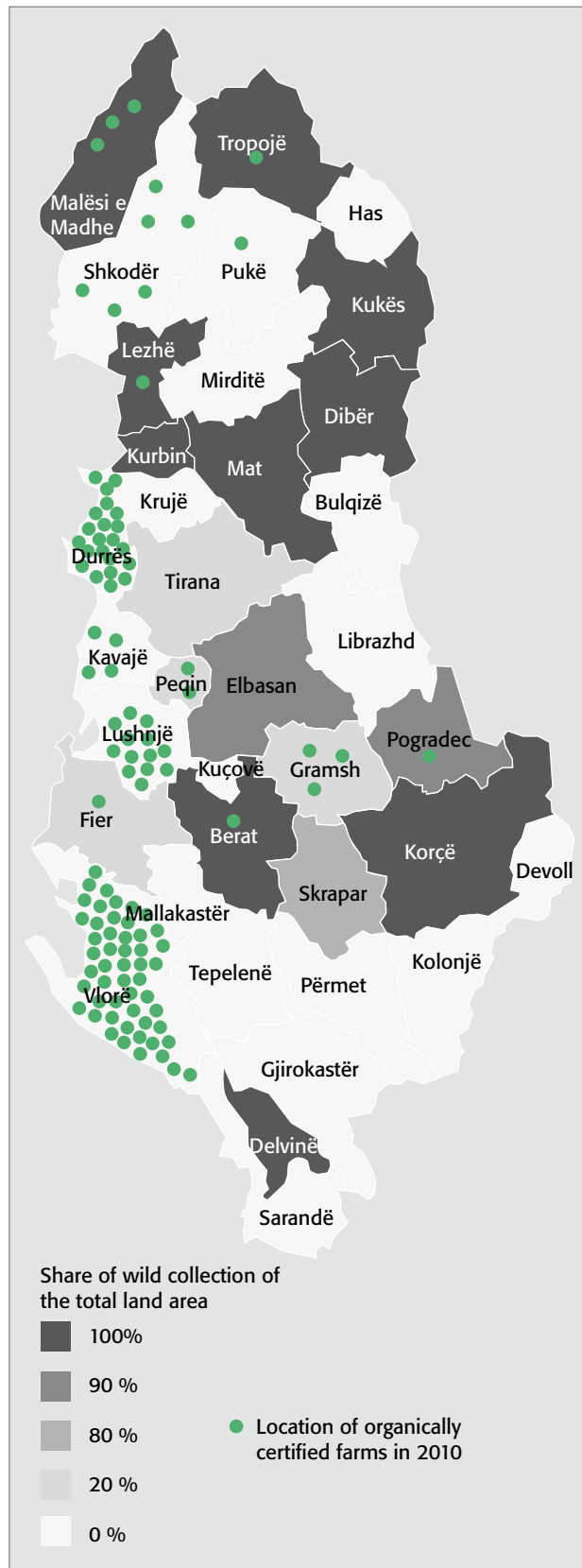
As the climatic conditions vary strongly between the coastal area and the mountainous areas, but also between the North and the South, there is a clear specialization of organic crops by regions. For instance, the mild winter climate, good soil conditions, and access to irrigation explains why the organic vegetable production is exclusively on the coast. Organic olive production is traditionally linked to the coastal areas of Albania, especially the South. One important production area relates to Vlorë, where

Table 5-1 Development of surfaces relating to main organic crops (in hectares)

Product types	2006	2007	2008	2009	2010
Cereals					1.2
Vegetables	7.0	11.0	23.0	6.0	5.1
Olives	21.0	22.0	147.0	85.0	63.0
Cultivated herbs	102.0	123.0	123.0	137.0	153.1
Grapes	9.0	15.0	15.0	13.0	25.3
Fruits and citrus	9.0	8.0	13.0	8.0	13.6
Berries					0.3
Vine seedlings			1.0		1.0
Fruit seedlings			1.0		0.2
Fodder	1.0	1.0	3.0		2.6
Pastures & fallow land	2.0	18.0	20.0	22.0	18.8
Total cultivated	151	198	346	271	284
Wild collected plants	152660	95089	139298	205529	251717
Total certified	152811	95287	139644	205800	252001
Number of organic operators	34	45	49	38	137

Source: Albinspekt, own research

Figure 5-1 Geographical location of organic operators



Source: *Albinspekt 2011 – own research*

in 2008-2009, the Dutch development organization SNV in collaboration with SASA supported the conversion of 30 hectares of olives to organic. Another hotspot for organic olives is Dushk, in the hilly parts of Lushnjë, where a group of 15 farmers converted to organic in collaboration with a processing company based in Tirana. This same company, Shkalla, was the driving agent that enabled a farmer group in the North, in Zus near Shkoder, to get involved in organic agriculture since 2010 by recultivating their olive groves in the backhills of the Buna valley.

The organic vineyards (25 hectares) in Albania belong to a few organic wine producers located on the coast near Tirana and Vlorë. Both modern and autochthon grape varieties are used in organic production. The production of organically certified fruits (less than 14 hectares) is scattered and relates mainly to small plots owned and cultivated by BioAdria farmers along the coast. Most important to mention is the production of organic strawberries in the North of Albania, in Shkoder (0.5 hectares), and the production of organic apples mainly in Kavaja, Lushnjë and Korçë (approx. 5 hectares).

The cultivation and wild collection of special herbs and aromatic and medicinal plants relate especially to the remote mountain areas off the coast, including: Korçë, Skrapar, Pogradec, Kruje, and Tropojë. With a surface of more than 250'000 relating to wild collection shows the relevance especially of wild collected plants. As mainly processing companies are the owners of the organic certification, located in urban centres, they mostly subcontract cultivation and collection to trustworthy actors in rural areas. In the case of wild collection, contracted collectors act many times as “local aggregators” as they collaborate with dozens of farmers in their surroundings to source the needed quantities. This same logic is true for mushrooms, which are commonly sundried in the sourcing region before supplied to a few processing companies.

More concentrated, however, is the production and collection of chestnuts. The 2'400 hectares of chestnut forest existing in Albania – the biggest in the Balkans – is located in the Tropojë re-gion, in the North of the country, near the borders of Montenegro and Kosovo. Thanks to the special climatic and soil conditions in this part of the country, the chestnut is the main crop in this area, ranging from around 300 to 1100 m.o.s.l. Up to now, the biggest part of the local population live from this crop: approximately 15'000 persons relating to around 3'000 farms present in the 50 villages of this region. Currently, most of the chestnut forests are organically certified under the

wild collection scheme. The driving actor behind this is AMLA, an Albanian company that started to set in place chestnut processing infrastructure in Tropojë since 2006. Up to now, compared to other countries, organic animal husbandry remains of little importance in Albania, although this might change in the coming years as consumers and retailers might request a broadening of the available organic product portfolio as consumer awareness steadily increases.

Limited availability of organic inputs

Because organic production is still small in Albania, trading of organic inputs is still at a low level. Input dealers have started only recently to include organic inputs into their portfolio, coordinating their delivery mainly with BioAdria regional coordinators and IOA staff (see Chapter 3).

Nevertheless, inputs for certain crops and applications have been very restricted, especially for different vegetables and fruits, vineyards, olives and cultivated plants. This is why BioAdria and its members together with IOA staff have carried out their own imports for pheromones, armicarb, biorga plumus and specific organic fertilizers. These are now being sold mainly through two new sales points, which are owned by BioAdria member themselves, one near Vlorë, and one near Dushk (see Box 3-1). These

sales points have the advantage that farmers have now also improved access to valuable technical information in regard to organic practices in general. The Positive Input List for Organic Inputs is in place and issued yearly by Albinspekt (see Box 3-3).



Monarda production in the highlands of Tirana

Table 5-2 Main spices and herbs cultivated and collected in Albania

Latin Name	English Name	C/W*
Melissa officinalis	Lemon balm	C&W
Anthriscus cerefolium	Chervil	C&W
Origanum majorana	Marjoram	C
Origanum vulgare	Oregano	C&W
Allium schoenoprasum	Chives	C
Rumex acetosa	Sorrel	C&W
Saturea Hortensis	Summer savory	C&W
Apium graveolense	Sedano	C&W
Eruca sativa	Rucola	C
Ocimum basilicum	Basil	C&W
Artemisia dracunculus	Tarragon	C
Anethum graveolens	Dill	C&W
Coriandrum sativum	Cilantro	C&W
Mentha spicata	Spearmint	C
Mentha piperita	Mentha	C
Petroselinum crispum	Parsley	C
Eruca sativa Mill.	Rocket	C
Salvia officinalis	Sage	C&W
Thymus vulgaris	Thyme	C&W

* Legend: C=Cultivated, W=Wild Collection



Chestnut production in Tropojë



Business interactions of Albanian country stand at BioFach 2010

Organic trade and marketing

While the export market of organic produce from Albania is growing fast, the development of the domestic market is still small. However, fast-growing supermarket chains are likely to change this situation.

The driving forces for trade and marketing of organic products from Albania differ strongly depending on the marketplace. In the case of exports, processing companies are the main drivers. In the case of the domestic market, farmers themselves are also the main players of organic marketing initiatives.

Crops for the domestic market versus crops for export

A quick overview of the markets for organic produce clearly shows there is very little overlap between the export market and the domestic market (see Table 6-1). While the domestic market relates very strongly to fresh produce – especially vegetables and fruits – and organic wine, the export market focuses entirely on processed products, mainly special herbs and wild collected plants. Organic olive oil is actually the only product that focuses on two markets: a quality market within the country, relating to taste and quality, and a specialty niche market abroad, relating to an exclusive taste, exotic origin, and fairtrade certification.

Because of the special characteristics of the export market versus the domestic market, which define the handling of the involved crops and products, a more detailed description of the main market segments is needed to understand the marketing logic and the growth potential in each case.

International demand boosts organic medicinal and aromatic plant exports

The international demand for organic medicinal and aromatic plants (MAPs) has grown fast in the last few years. Not only the food sector, but also the cosmetic sector tends to shift towards natural ingredients, where organic certification ensures that certain product quality standards are met. Companies from abroad and within the country have started to capitalize the favourable context and conditions that Albania has for these crops. In this process, important has been the foundation of EPCA in 2005, the Albanian Essence Producers and Cultivators Association, which has helped to build and consolidate the needed functional partnerships between processing and exporting companies, collectors, and farmers, thus linking efficiently the

Table 6-1 Approximate Amount of traded organic produce during 2010 (in tons)

Product categories	Tons Export	Tons Domestic
Cereals	0	52
Vegetables	0	77
Fruits and citrus	0	182
Vineyards	0	258
Olive Oil	2	8
Cultivated herbs	120	18
Wild collected plants	5991	78

Source: *Albinspekt, own research*

rural areas with the urban centres, where bigger companies tend to have their processing facilities (see Box 6-1).

In regard to MAPs, less than ten processing companies shape the organic export market of Albania. Counting with international certification along the whole value chain, they act mainly as providers of ingredients to manufacturing companies abroad. Organic produce is mainly shipped in bulk, in the form of essential oils or dried, depending on the specific crops. Currently, the most important companies in this field are: Xherdo, Tomadhea, Laite AE, ATC, ERBA, Albfrut, and Elba Shehu.

As mentioned earlier (Chapter 5), processing and exporting companies have strong partnerships with collectors to ensure quantities and quality of produce. In this sense, production is mainly managed by trustworthy business partners, such that the company can concentrate its efforts on processing and exporting activities. Only in a few cases, do companies rent land to produce on their own. This is mainly happening when specialty herbs are produced, such as monarda or edelweiss, which is the case of the Tomadhea Company.

The most important export markets for organic MAPs from Albania are the European Union, Switzerland, and the United States. The buyers are mainly companies involved in the trading business of organic ingredients or in the production of their own final products, relating to the cosmetic or food sector. In a few cases, buying compa-

nies have formed some sort of joint venture with Albanian companies, supporting them with know-how and the pre-financing of harvests to accelerate the expansion of specific business opportunities. In this regard, for instance, an important actor has been the Sonnentor Company, as they have been partnering up with different Albanian companies to cooperate in MAP production and commercialization.

Interesting international niche markets for mushrooms, chestnuts, and organic olive oil

Beyond MAP's, the export statistic shows that three additional organic businesses are of major importance: mushrooms, chestnuts, and organic olive oil.

Since mushrooms relate to wild collection and are exported dried – the edible boletus being the most important type – they are mainly a side business of those companies involved in MAP processing. The logic is the same: to establish trustworthy partnerships with different producer groups to ensure the optimal quality through local sourcing. Yet, since climatic factors strongly influence mushroom production, harvesting and trading undergoes big annual fluctuations, which makes this business rather difficult.

The chestnut business is in this respect much simpler, as supply is abundant and without big fluctuations. Although the traditional chestnut forests in northern Albania produce much less than what was produced during communist times, when forests were better maintained, the roughly 2'400 hectares of chestnut forests produce still much more than what is traded and consumed. Currently, only about half of the chestnut production, about 4'000 to 5'000 tons per year, is harvested. Because chestnut storage is very limited without processing, trading is very much bound to the harvesting season, September to October. In these months, prices tend to drop drastically, as the local markets in Albania and nearby Kosovo get saturated. Thus, processing and exporting opportunities are of greatest importance for the region. With the establishment of the AMLA Company in 2006, however, the only processing company in the region Tropojë has gained an important ally in this respect. Thanks to Biofach, important exporting activities have started since then, partnering up with companies involved in chestnut trading and processing in Italy, France, Germany, and Switzerland. In any case, the growing demand for chestnuts in the convenience food sector provides a highly interesting development scenario for AMLA and Albanian chestnut producers. The fact is that Albanian chestnuts are not only produced at a lower



cost than in competing countries (e.g. Italy and France), but that they are also of better quality. Their bigger size and sweeter taste seem to relate to the native chestnut varieties present in Albania and the favourable soil conditions that prevail in the Tropojë region. To increase the limited processing and storage capacities – currently limited to 600 tons per year – AMLA is currently investing to multiply the production volume by a factor of 4 or 5 in the coming years while being able to generate more added value within Albania through new processing line equipped to manufacture also chestnut flour and dough, etc. The newly planned infrastructure will certainly strengthen the organic chestnut business and the partnerships with local producer groups and collectors, thus making a very important contribution to the region's development as around 80% of the local population live directly or indirectly from the chestnut business.

The third interesting organic export business relates to organic olive oil. Despite the fact that Italy, Greece, and Spain produce at lower costs than Albania – benefiting from important production and processing subsidies – Albania has shown that its organic olive oil is among the best of the world. Company Shkalla's organic extra virgin olive oil has been selected as the best quality oil among 200 countries in two international competitions in Italy in 2005 and 2006 (PremBiol). Successful exports to Switzerland since 2004 confirm Albania's potential to compete in quality niche markets based on modern processing technology and functional partnerships between the process-

ing companies and olive grower groups. That this pathway is feasible and promising is shown also in the newest ventures. In 2011, a new company, Musaj shpk, started with first successful exports to Switzerland; and in the same year, Shkalla successfully launched a new olive oil with St. John's Wort Flower, as a specialty product for the growing natural health market within Albania and abroad.

Strategic development of the domestic market for organic products

The development of the domestic market for organic products has been one of the main objectives of the SASA project (see Box 2-2). However, the limited purchasing power of many Albanians and the limited and seasonal supply of organic produce hampered the development of this market. Public awareness creation did not promise to bear fruit as long as not more consumers would be able to access organic products. Thus, up to 2009, the marketing of organic products related basically to a few modest and seasonal sales points in Tirana and Durrës run by organic farmers themselves.

A notable change has happened since 2011, when SASA promoted and supported marketing initiatives involving both organic and typical products, the latter being part of a labelling initiative backed up by "Albanian Guarantee" standard (see Box 6-2). This strategy helped to create a portfolio of more than 60 labelled products – organic and typical – which would attract consumers' attention and guarantee sales during the whole year. One big advantage was that many typical products are processed (e.g. fruit jams, dried fruits, cheese, olive oil, wine, raki, jufka) such that they complement nicely the mainly fresh organic produce. Thanks to this initiative, up to early 2012, the following sales points were implemented and promoted with this "double strategy":

- 1 sales point in the Durrës wholesale market
- 1 retail shop in Vlorë (see Box 6-3)
- 1 retail shop in Shkoder
- 2 retail shops in Tirana
- 1 sales van mainly located in Tirana (see Box 6-4)
- 1 sales point in Tirana airport's duty free area
- 2 restaurants offering dishes with typical and organic products, in Shkoder and Vlorë
- 1 "healthy corner" within the supermarket chain Mercator (see Box 6-5)

From a market development perspective, the strong interest from the retailers in the combination of typical and organic products helped to approach consumers in a more

professional manner, thus creating important awareness to stimulate further market growth. On the supply side, as sales volumes are still limited up to now, marketing channels remain short and simple: farmers and processors themselves act in most of the above mentioned cases as providers. The major exception is Mercator supermarket, where Agropuka, a producer association from the Puka region specialized in typical food products, acts as an intermediary. In this case, Agropuka is not only in charge in coordinating deliveries but also to do the needed invoicing for the currently 50 products involved in Mercator's healthy corner. This special role is a consequence of the supermarket's policy to work with a limited number of providers, thus forcing a functional collaboration between individual producers in this case.

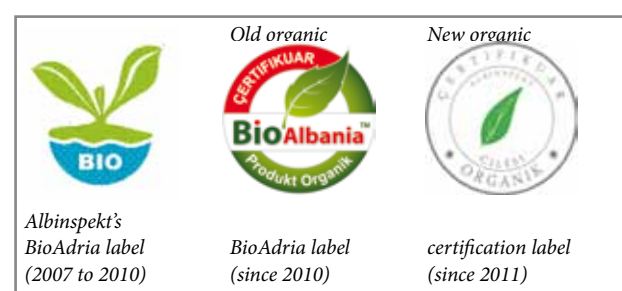
Domestic labels to promote marketing of organic produce

In 2007, the first bio logo was created as part of the SASA project, owned by BioAdria (Figure 6-1). At that time, this logo was used on product labels and promotion material, e.g. leaflets and calendars for consumers and billboards for BioAdria farmers with road access.

Based on the results of a consumer survey in 2009 that showed that this logo is not well understood by consumers, a new logo was created. The new logo would not refer to "bio" – also used in the health food sector, especially dairy – but to "organic" (Figure 6-1). Moreover, the new logo would emphasize more "Albania" and conveying more the idea of a "guarantee stamp". This new logo – "BioAlbania" – was introduced by BioAdria in 2010, to be used on all new product labels of BioAdria members.

In addition, during 2010, the national certification body Albinspekt (see Box 3-3) also launched its own logo (Figure 6-1), which clients can use on their products instead of a simple claim that mentions that the product was certified by Albinspekt (together with accreditation number of Albinspekt). Up to now, the logo has not been used widely.

Figure 6-1 Private organic logos



Box 6-1 EPCA

The Albanian Essence Producers and Cultivators Association (EPCA) was founded in 2005 as a non-profit organization to coordinate and promote the cultivating, manufacturing, collecting, and processing of medicinal plants from Albania. The main objective of EPCA is to safeguard the rich diversity of medicinal plants together with the clean/non-contaminated production environments in Albania's rural areas.

With its 200 members involving collectors, cultivators, processors, and exporters, it has played a key role to develop this sector. EPCA helped to set in place sound governmental and internal policy that promote and ensure product quality related to the more than 80 plant species that EPCA is involved with. With its board involving actors from 9 different regions representing different activities, medicinal plant value chain makes EPCA a very strong and dynamic association promoting both ISO and organic certification in the sector. This clear focus on quality enables EPCA members to successfully link up with importing companies from abroad. Currently, EPCA is preparing two important documents relating to the medicinal herb sector in Albania:

- Albanian Herbs and Spices Collected and Cultivated in Albania
- Standards and Industrialization of Medicinal Plants from Albania

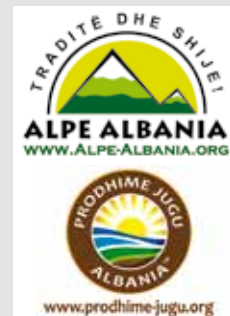
Most important medicinal plants commercialized by EPCA are: *Salvia officinalis*, *Laurus nobilis*, *Saturea Montana*, *Myrtus communis*, *Thymus capitatus*, *Thymus serpyllum*, *Achillea millefolium*, *Juniperus communis*, *Juniperus oxycedrus*, *Pyrus malus*, *Melissa officinalis*, *Hypericum perforatum*, *Crataegus sp.*, *Rosa canina*.

Box 6-2 The Albanian Guarantee Standard

Albanians love products from their own country. But how can they be sure that they are of good quality, and that they are really produced in Albania? This is what the Albanian Guarantee Standard does: it certifies Albanian produce by ensuring that it is manufactured within Albania, with domestic ingredients (where possible), while quality is guaranteed at the level of production and marketing.

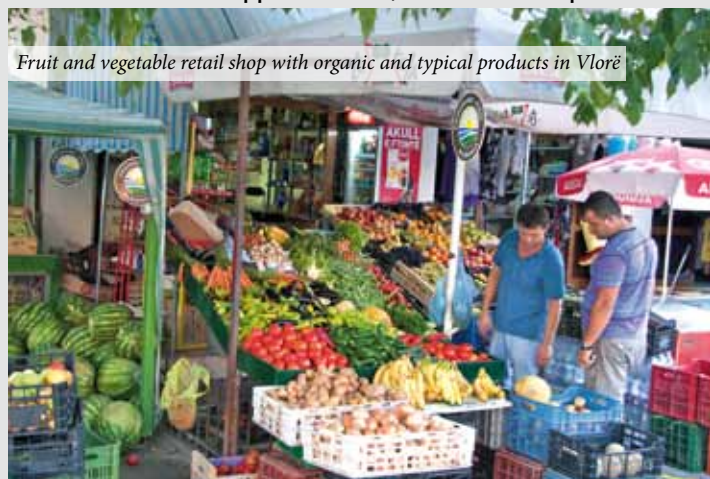
The Albanian Guarantee certified products are identified in the market through two logos, which relate and represent the regions from which they originate: Northern Albania (Alpe Albania) and Southern Albania (Prodhime Jugu). Until the end of 2011, more than 60 were certified with this new standard.

The Albanian Guarantee certification and labelling system is a mayor outcome of SASA's work between 2009 and 2011 (see Box 2-2). In order to make this initiative sustainable, SASA project staff formed in 2011 the Albanian Association of Marketing (see Box 7-1), ensuring that quality standards are met. For more information, visit: www.garancias-hqiptare.org (in Albanian).

**Box 6-3 Organic Retailing in Vlorë**

In 2009, a retailer from Vlorë approached actors involved in SASA sharing his interest to sell organic and typical products in his fruits and vegetable stand. This initiative became a reality in 2010, when a group of farmers from Llakatund agreed to get organized and produce explicitly for this retailer. With the support of SASA, the new sales space was branded with BioAlbania and Albanian Guarantee labels, and a billboard was placed as an attractive eye catcher for consumers to promote this new offer. The shop is situated in the main avenue of Vlorë with high visibility for consumers.

Overall, both producers and consumers have shown greatest satisfaction about this new sales point. Interviews with consumers reflect their high appreciation for the new quality products offered from the region, being easily accessible at reasonable prices. Importantly, they have started to understand what benefits come along with "organic", and what their region can offer in terms of quality and variety. As the positive feedback from consumers has spread, the store has gained more clients and sales have increased.



Fruit and vegetable retail shop with organic and typical products in Vlorë

Box 6-4 The Mobile Food Shop in Tirana

When different actors involved in SASA (see Box 2-2) were discussing options and opportunities to promote organic sales in Albania, one important conclusion was that special sales points are needed: one that, first, can cope with the limited and changing supply, and, second, that is highly attractive in the sense that it helps to boost public awareness for organic. Thus, a sales van was perceived and evaluated as a good opportunity to approach Tirana consumers in strategic sales points and moments with a qualitative product portfolio that would involve not only organic (mainly relating to fresh produce) but also typical quality products (mainly relating to processed products).

In 2010, SASA took the leadership in buying and designing such van in close collaboration with sector stakeholders. The van was branded and tested in different events in Tirana, Durrës, Elbasan, and Pogradec. The interest shown from consumers and the media confirmed that a “mobile food shop” is ideal to promote organic products – without being under pressure to have the shop open every day.

Based on the good testing results, the van was tendered such that the project would hand it over to the most promising actor. A trading company specialized on quality food, AgroKoni, was chosen to start using the van. After a successful testing phase towards the end of 2011, the van was then transferred to AgroKoni, who showed a strong commitment to using this Mobile Food Shop to further develop the market for organic and typical products from Albania.



Mobile food shop offering organic and typical products in Tirana

Box 6-5 Mercator's Healthy Corner

Mercator is a newly established supermarket chain in Albania, with headquarters in Slovenia and a strong presence in Serbia, Bosnia & Herzegovina, Croatia, Slovenia, Montenegro, and Macedonia. Being new in Albania, Mercator staff appreciated the participatory activities the SASA project implemented during 2010 aiming to develop the market for organic and typical products from Albania (see Box 2-2). After several meetings, based on first fruitful interactions, the Mercator and SASA staff agreed to create together the first Healthy Corner in Albania – an area in the supermarket used to showcase and promote sales of both typical and organic products from Albania.

The Healthy Corner was inaugurated in April 2011 in Mercator's biggest outlet, City Park, on the highway between Tirana and Durrës. The special area was conceived to help contribute to raising public awareness for organic and typical products labelled with the Alpe Albania, Prodhime Jugu, and BioAlbania labels.

The Healthy Corner proved to be very successful. The income generated for the first few months was on average 1'000 Euro. More than 50 different products through this stand by the end of 2011, produced by almost 30 different actors. The positive image that this stand generates for Mercator derived the interest to replicate such sales point also in other outlets of Mercator. In the meantime, Carrefour has also expressed interest in having a similar “corner” in their newly inaugurated first outlet in Albania.



Healthy corner in Mercator's City Park outlet between Tirana and Durrës



Organic

Albanian
olive oil from
and
Colour: golden
Aroma: olive w
Flavour: Fruity
Storage: Away

VAJ ULLIRI
EKSTRA I VIRGJER
ORGANIK



PRODHUESI I VAJES
VIRETET AUTENTIK
"SHKALLA SHKALLA" / TIRANE



VAJ ULLIRI
EKSTRA I VIRGJER
ORGANIK



PRODHUESI I VAJES
VIRETET AUTENTIK
"SHKALLA SHKALLA" / TIRANE

BIOL

SHKALLA

Prodhuesi dhe ambalazhuar
nga kompania
"Shkalla SH", Tiranë, Shqipëri
Tiranë, Albanië

Organic
EXTRA VIRGJER
Olive Oil



VAJ ULLIRI
EKSTRA I VIRGJER
ORGANIK



PRODHUESI I VAJES
VIRETET AUTENTIK
"SHKALLA SHKALLA" / TIRANE

BIOL

SHKALLA

Prodhuesi dhe ambalazhuar
nga kompania
"Shkalla SH", Tiranë, Shqipëri
Tiranë, Albanië



VAJ ULLIRI
EKSTRA I VIRGJER
ORGANIK



PRODHUESI I VAJES
VIRETET AUTENTIK
"SHKALLA SHKALLA" / TIRANE

BIOL

SHKALLA

Prodhuesi dhe ambalazhuar
nga kompania
"Shkalla SH", Tiranë, Shqipëri
Tiranë, Albanië

Gourmet presentation of Shpresa Shkalla's organic olive oil

Opportunities & challenges for the organic sector

Opportunities and constraints have strongly shaped the organic sector in Albania. To further boost sector development, it is important to anticipate and influence the most critical constraints and favour further sector development through optimal interventions.

Further organic sector development is a clear goal of the Albanian government. Besides that this sector promises to generate important income at the level of individual actors (e.g. farmers, processors, traders, retailers), it is of greatest importance from a development point of view. Tangible economic, social, and environmental benefits are expected as this sector develops further.

Most important and interesting organic market opportunities for Albania

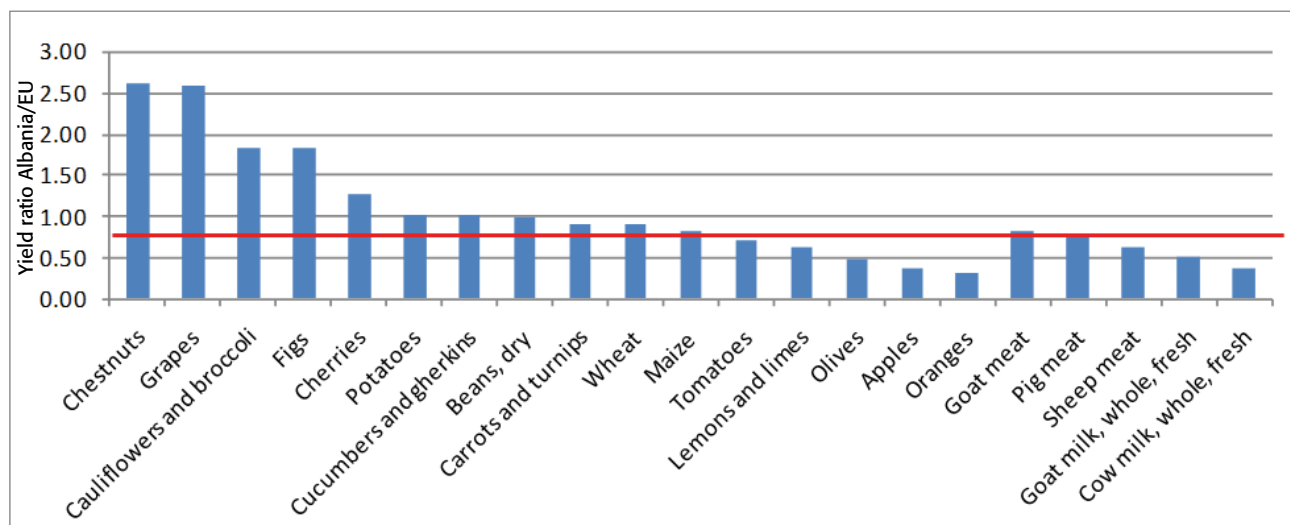
In order to assess the development potential of Albania's organic sector, both the contextual situation in regard to framework conditions (see Box 1-1) and the general competitiveness of crops must be taken into account (Figure 7-1).

In this sense, the most interesting crops relate to those opportunities where both constraints and favouring factors promise optimal added value creation, based on interest-

ing market demand and favourable conditions along the whole value chain (i.e. available resources, human and social capacities). For Albania, this is especially true for the crops and market opportunities illustrated in Figures 7-2 and 7-3, which are all labour intensive and refer to resources that have good availability in Albania, in terms of quantity and quality.

For export, especially relevant are organic product presentations related to medicinal and aromatic plants, chestnuts, and wild mushrooms and berries. The international demand for these crops in organic presentations is increasing – as ingredients, semi-finished, or final products. And since the production and collection of these crops relate strictly to remote and poor areas of the country, they are of greatest relevance from a development point of view. Yet, a gradual improvement of the collection, storage, and processing facilities will be key to fully capitalize on these opportunities.

Figure 7-1 Differentiated competitiveness of Albania's agricultural sector*















* Note: Conventional production: ratio 1 refers to equal average yields, red line refers to equal competitiveness (taking into account production costs).

Source: Taken from Rural Development Programme under the Instrument for Pre-Accession Assistance 2011-2013, MoAFCP, 2010 (based on FAO data).

Besides, special attention should be given to export opportunities relating to organic olive oil and organic winter vegetables. Although competition from other countries is harsher for these crops, there are niche market opportunities that Albania can tackle. In both cases, an interesting image gain can be expected as these quality products would reach the international market as final products, with a clear indication on the product label of being “produced in Albania”. The successful development and expansion of these two opportunities will depend crucially on the quality of the partnerships that will be built: first between the exporting company and primary producers, and, second, between the exporting company and an international trader or retailer. In the case of organic olive oil, the marketing success in Switzerland shows that this is a feasible pathway to go.

As described in previous chapters, the domestic market for organic products is currently very small. Despite the fact that consumers are gradually being confronted with “organic” and are starting to understand this concept, it must be anticipated that the limited purchasing power of the majority of Albanians is a big hindrance for the fast and broad development of this market. Overall, this implies that the “organic opportunities” in the domestic market must mostly relate to specialty products. Based on the survey work and marketing experience in this regard, organic products from Albania must clearly emphasize their origin and meet other quality expectations that consumers have for different products related to packaging and labelling, and to freshness (e.g. fresh vegetables and fruits) and taste (e.g. olive oil, wine, jams, herbal teas) depending on the product category.

Figure 7-2 Assessment of organic market opportunities for Albania*

Organic Produce	Export Market	Domestic Market
Medicinal and aromatic plants	 <ul style="list-style-type: none"> • Essential oil • Bulk, dried • Retail products (eg. shampoo, tea herbs) 	 <ul style="list-style-type: none"> • Retail presentations (eg. shampoo, tea herbs)
Dried mushrooms and berries	 <ul style="list-style-type: none"> • Bulk, dried • Retail presentations 	 <ul style="list-style-type: none"> • Retail presentations • Bigger size catering packages
Chestnuts	 <ul style="list-style-type: none"> • Bulk, processed (dried, peeled, flour) • Wholesale presentations (cooked, frozen, sweetened) 	 <ul style="list-style-type: none"> • Retail presentations • Bulk, for wholesale
Olive oil	 <ul style="list-style-type: none"> • Retail presentations (gourmet & health niches) • Specialty product, mixed with organic herbs and spices 	 <ul style="list-style-type: none"> • Quality retail presentations (gourmet & health) • Gift retail presentation
Fresh fruits and vegetables	 <ul style="list-style-type: none"> • Fresh winter vegetables • Specialty fruits (kaki) 	 <ul style="list-style-type: none"> • Quality retail presentations • Wholesale (catering, restaurants)
Wine	 <ul style="list-style-type: none"> • Specialty wine (retail) (origin & organic) 	 <ul style="list-style-type: none"> • Quality wine (retail) • Restaurant presentations (bulk)

* The size of the circles refers to the income potential of each market opportunity: biggest circle → “very big potential”, smallest circle → “limited potential”.

Key aspects and recommendations to boost organic exports

For the export market, the main challenge relates to sound development and consolidation of partnerships with foreign companies, as buyers and potential investors. The precondition is for Albanian companies to meet the expectations in this regard: they must be an optimal exporting partner and be able to source in a timely manner the required ingredients or products in terms of quantity and quality. Since Albania's organic export opportunities relate to wild collected plants and species, this implies optimal partnerships along the whole value chain. Well-coordinated high quality work is needed at different levels: production/collection, trading, processing, and exporting. All in all, this comes down to companies' capacities in three main areas:

- A. Finances – Needed capital to implement the necessary investments and make the business respond to quality and quantity requirements of the international market.
- B. Human capital – Ideal capacities to interact with international and local actors, plus good analytical and strategic thinking to manage all activities needed for the success of each organic business.

With regard to finances (A), favourable grant schemes (i.e. low interest rates, interesting payback period) would help companies with needed investments and help them overcome potential liquidity gaps. Yet, to ensure that the business opportunity is optimally defined together with the planned investment, a sound business plan should be linked to such financial schemes.

In respect to companies' human capital (B), such capital is best developed through interventions that confront company managers with fruitful contexts and activities. Most "enlightening" are activities where exporters learn from each other, through fairs and joint meetings, when not only general insight is generated, but also relevant informal information is shared. Such functional interaction would best be nurtured through a market-oriented development project, which would provide the facilitation to make this interaction happen. The big advantage of such intervention would be that it could create important "development leverage" through co-investments into (impact) relevant business development backed up by sound market research and promotion activities (e.g. fairs, websites, leaflets) that would further improve the competitiveness of the involved companies and the sector as a whole. The experience of SASA (Box 2-2) and the Albanian Association of Marketing (AAM) (Box 7-1) provide interesting reference information for such approaches.

Box 7-1 Albanian Association of Marketing

The Albanian Association of Marketing (AAM) is an association of currently 15 young professionals with a strong marketing and public administration background. Founded in 2010, AAM's main goal is to establish and foster good marketing practices in Albania.

Its services relate to both public and private organizations, supporting them in the creation and delivery of solutions to build better relations with their customers and other stakeholders through efficient marketing and promotion techniques. In some cases, this involves the development and promotion of standards relating to "best marketing practices" and "responsible marketing". In all this, consumer survey work lays the ground work to understand consumer perceptions to find solutions how best to respond to their interests and concerns through aligning marketing with production practices.

AAM is an action oriented organization that applies its concepts functionally to different domains and sectors, including Agriculture, Environment, SME Development, and Education. Since different associates of AAM have been involved in SASA and its market development work, it is AAM that now has the lead role in consolidating and promoting the Albanian Guarantee Initiative (see Box 6-2).



Key aspects and recommendations to boost domestic market development

For the domestic market, a stronger market growth for organic products is needed. A bigger organic market is essential to make all services currently in place become sustainable, including organic extension, certification, and promotion activities. Yet, to ensure interesting sales prices for producers, the primary driving force for this market expansion should be on the demand side. The supply side should rather respond with adequate production to those market opportunities that develop as demand gradually grows. In this sense, the main constraints and challenges relate very strongly to demand and supply:

- A. Public awareness for organic goods – Most consumers within Albania are still not aware of what "organic" is and what benefits relate to it.
- B. Supply of organic produce – The availability of organic produce is very limited, in terms of quantity, diversity of products, and seasonality.

With regard to public awareness (A), the clear driving factor for this must be retail solutions that can cope with the

currently still limited and often seasonal supply while creating important public awareness. In this sense, the new trend to sell and promote organic food together with typical products seems to be a promising strategy (see Chapter 6).



National organic conference in 2011 in Tirana

Using this logic, stronger partnerships with supermarkets and specialty stores help to further position organic food in these quality segments. Moreover, the higher prices for organic foods are in this context a clear advantage to differentiate these products from conventional ones.

In respect to increasing the supply of organic produce (B), it is fundamental that such growth in production responds to market needs. In other words, the public subsidy scheme should not be the main driving force to increase organic production, but tangible market demand for specific organic crops. To make sure that farmers are aware of such demands and are able to respond, farmer groups and associations should become much more active in this respect. Especially relevant would be that BioAdria converts into a reliable partner for traders and supermarkets, discussing and setting up sound delivery schemes for organic produce. An opportunity that remains to be exploited in this context is the potential export of organic winter vegetables, or crops where Albania has comparative advantages, such as melons and broccoli, etc.

Overall, special public funding would be interesting to strengthen such a market-oriented networking approach. In any case, a stronger involvement of retailers in such work is necessary to ensure that investments on the production side are well placed. Ideally such funding would also support an annual conference on organic agriculture (see Box 7-2) and support activities that further promote organic at a higher level, through effective media coverage and an a policy dialogue that involves the private sector.

Box 7-2 Annual Organic Conference

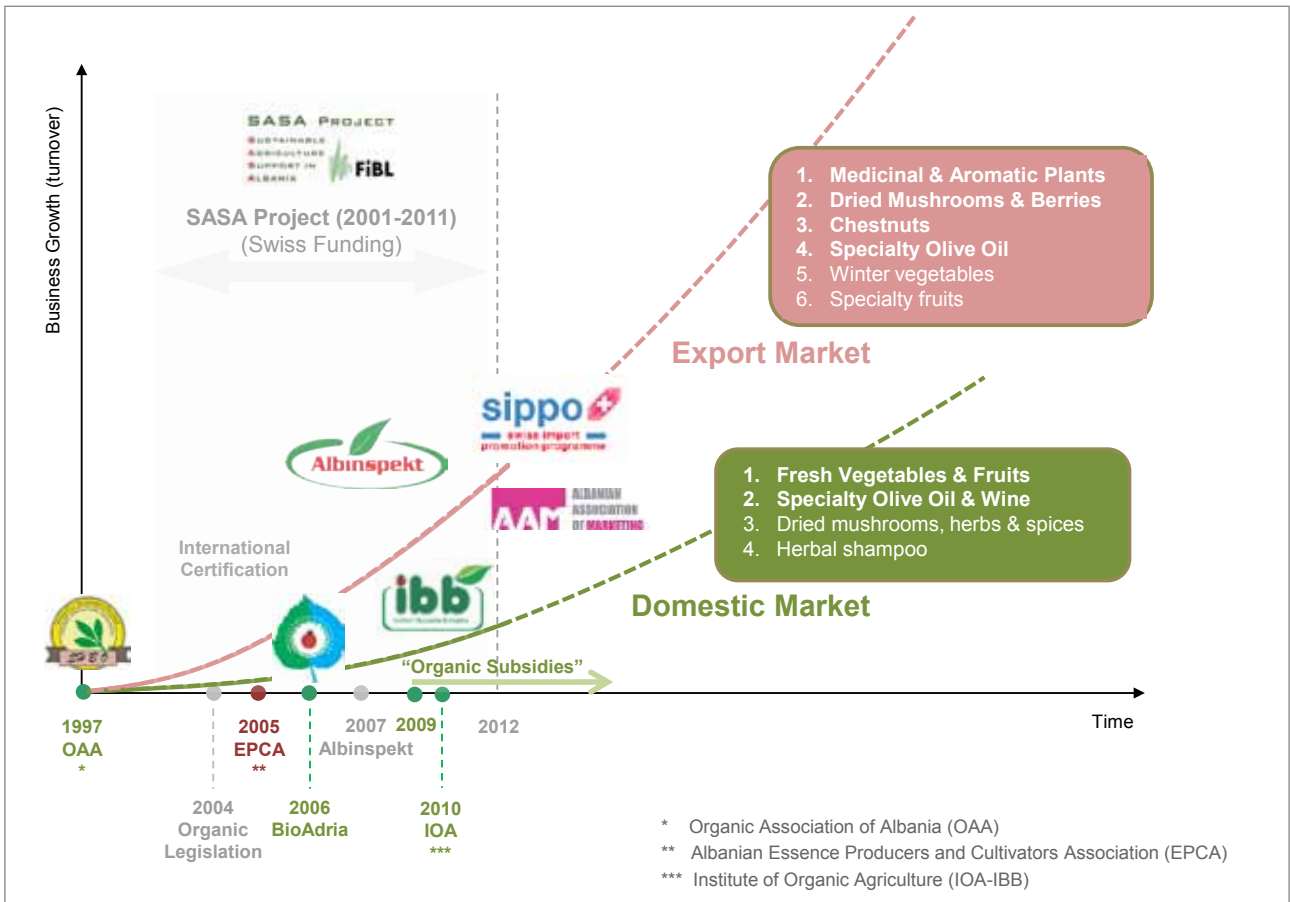
On June 30, 2011, a national Organic Conference was held, organized and implemented by SASA partners in collaboration with the Ministry of Agriculture. The conference was entitled “Organic Agriculture – an efficient pathway for Albania towards EU integration”, a topic that promised interesting contributions from the presenting actors while ensuring good participation from the side of sector stakeholders and the media.

The conference had a main plenary session on trends, opportunities, and challenges in relation to the international development of the organic sector. Smaller sessions related them to the organic sector in Albania – “Good Organic Production Practices”, “Marketing of Organic Products”, “Promoting Organic Production” and “Promoting Organic Marketing” – moderated session that involved four speakers each.

The conference was attended by around 200 participants. While most participants related directly to organic production, processing, and retailing, also representatives of different entities active in supporting and promoting the agricultural sector in Albania. Especially well represented was the Ministry of Agriculture, with staff from headquarters and from regional offices (i.e. local directories).

Thanks to the conference’s topics and the presence of Mr. Ruli, Minister of Agriculture, and Urs Niggli, Director of the Research Institute of Organic Agriculture (FiBL) in Switzerland, the media coverage results were excellent. Overall, 12 TV stations and 11 print media covered the event. This extraordinary coverage shows how relevant this topic – organic agriculture – is for Albania!

Figure 7-3 Organic market development context and expected growth trends for the export and domestic market





Important contacts & references

Processing and Exporting Companies

Tomadhea

Cultivation, wild collection, processing, and export of medicinal and aromatic plants and mushrooms

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Web: www.tomadhea.com

Xherdo

Cultivation, wild collection, processing, and export of medicinal and aromatic plants and Essential Oils

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Elite AE

Cultivation, processing and export of fresh spices and edible herbs

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Web: www.eliteae-al.com

Elba Shehu

Cultivation, wild collection, processing, and export of medicinal and aromatic plants

Contact: Xhevdet Shehu

Address: Lgi. 5 Maj, Rr. Fetah Ekmeciu, Nr. 51, Elbasan, Albania

Tel. +355 5425 9174/ +355 682282677

Fax.+355 5425 2127

E-mail: elbashehu@enet.al

Web: www.elbashehu.com

Shkalla SH

Processing and export of organic extra virgin olive oil and mixed with Hypericum Perforatuml

Contact: Shpresa Shkalla, General Director

Address: Rr. Qemal Stafa, P 161, ap.5, Tirana, Albania

Tel. +355 4 2268765 / +355 69 22 98 924

Fax: +355 4 2268765

E-mail: info@shpresashkalla.com

Web: www.shpresashkalla.com

ATC

Cultivation, wild collection and export of medicinal herbs and tea production for the local market

Contact: Ylian Liperi, General Director

Address: Lgi. 6, Rr. Maliq Muco, 1011 Durrës, Albania

Tel. +355 52 222880 / +355 52237700

E-mail: aarlindab@yahoo.com

Erba

Cultivation, wild collection, processing, and export of medicinal herbs and aromatic plants

Contact: Kujtim Kekaj, General Director

Address: Koplik, Malesi e Madhe, Shkoder, Albania

Tel. +355 68 2738432

E-mail: kujtim_kekaj@yahoo.com

AgroHerbAl

Wild collection, processing, and export of medicinal plants

Contact:

Address: Mamurras, Lac, Albania

Tel. +355 42 371814

Fax: +355 42 371814

E-mail: info@agroherbal.com

Web: www.agroherbal.com

Agim Kadiu

Cultivation of olive trees and processing of extra virgin olive oil

Contact: Agim Kadiu

Address: Dushk, Lushnjë, Albania

Tel. +355 693857182

Sonnentor

Organic production from wild collection, cultivation and processing

Contact: Endrit Kullaj, Branch Manager

Address: Bulevardi Dëshmorët e Kombit,

Hotel Rogner, 1000 Tirana, Albania

Tel. +355 684096186

E-mail: office@sonnentor.al

Web: www.sonnentor.com

Lukova Jon

Cultivation of olive trees and processing of extra virgin olive oil

Contact: Minella Gjenerali

Address: Rr. Gjin Bue Shpata, P 7, ap 36, Tirana, Albania

Tel. +355 692093216

E-mail: klodianagjinaj@yahoo.com

Bajram Droja

Cultivation, processing and export of calendula officinalis flower

Contact: Bajram Droja

Address: Lagjia Nr.2, Abazaj, Krujë, Albania

Tel. +355 692246617

Dashnor Lame

Cultivation, wild collection, processing, and export of medicinal and aromatic plants

Contact: Dashnor Lame, General Director

Address: Lagjia Loni Dharmo, Shëtitorja e

Palmave, Lushnjë, Albania

Tel. +355 692065596

Cupi

Cultivation, wild collection, processing, and export of medicinal herbs and Essential oils

Contact: Preng Cupi, General Director

Address: Ishull Lezhe, Lezhe, Albania

Tel. +355 21525173 / +355 683393726

E-mail: essentialcupi@yahoo.com

Dalmacia

Wild collection of cornel fruits and processing of cornel juice

Contact: Mark Gjonaj, General Director

Address: Rruga Migjeni, Puke, Albania

Tel. +355 672536318 / +355 683491202

E-mail: dalmacia_puke@hotmail.com

AlbFruit 2005

Cultivation, wild collection, processing, and export of medicinal and aromatic plants

Contact: Albert Xhaja

Address: Rr. 1 Maji, Lgj. 1, P. 159, 7300 Pogradec, Albania

Tel. +355 68 20 84655/ +355 69 52 75248

Fax: +355 86 93 0003

E-mail: info@albfruit2005.com

Web: www.albfruit2005.com

Amla

Wild collection, processing and export of chestnuts

Contact: Ramiz Jahaj, General Director

Address: Lgj. Dardania, Bajram Curri, Tropojë, Albania

Tel. +355672892691

E-mail: contact@amlashpk.com / r.jahaj@amlashpk.com

Web: www.amlashpk.com

Gjedra

Wild collection, processing and export of medicinal plants and spices

Contact: Gjergji Qose, General Director

Address: Ish Magazinat e shtetit, Ura Vajgurore, Berat, Albania

Tel. +355 3232565

Organic Producer Groups

Vlorë Farmers' group

Production of organic fruits, vineyards and vegetables in open field and plastic tunnels for the local market supply. Production of wine from organic vineyards for supplying domestic market and restaurants.

Contact: Hair Xhafaj, Group representative

Address: Hoshetime, Vlorë, Albania

Tel. +355 692731182

E-mail: gencixhafaj@yahoo.com

Zus Farmers' group

Cultivation of organic olive trees and olive oil for supplying an organic olive oil exporter with raw material and offering organic olive oil in the local market and restaurants.

Contact: Muhamet Duli, Group representative

Address: Zus village, Shkoder, Albania

Tel. +355 674035620

Lushnjë Farmers' group

Cultivation of organic olive trees and processing of olive oil. The group of Olive growers supplies with olives a processor and exporter of organic olive oil and additionally processes Extra virgin olive oil for the domestic market, trading in Healthy Corners in Tirana and Durrës.

Contact: Agim Kadiu, Group representative

Address: Dushk, Lushnjë, Albania

Tel. +355 693857182

Shkodra Farmers' group

Production of organic fruits and vegetables in open fields for the supply of the local market and restaurants in the region.

Contact: Edmond Fugarini, Group representative

Address: Velipoje, Shkoder, Albania

Tel. +355 672279285

E-mail: permaorganic@yahoo.co.uk

Tirana and Durrës Farmers' group

Production of organic fruits, vegetables, grapes and olives. The organic grapes are processed to obtain organic wine offered in the most famous restaurants in Tirana and Durrës and supplying the Healthy Corners in Tirana and Durrës region. Organic olive growers supply one of the organic processors and exporters of organic olive oil for supplying the European and domestic market.

Contact: Fatmir Kallbaqi, Group representative

Address: Durrës, Albania

Tel. +355 6938224115

Organic Sector Institutions

Organic Agriculture Association (OAA)

The first organic farmers association established in Albania, dated in 1997. One of the pioneer associations of organic farmers established in 2006. Member farmers produce organic fruits and vegetables, vineyards, olive trees, medicinal herbs, olive oil and forest fruits for the export and domestic market.

Contact: Lavdosh Ferruni, Executive Director of OAA
Address: Sheshi "Wilson, Rr. "Sami Frashëri", P. 20/10, 8-th floor, Post Box 7466, Tirana, Albania
Tel. +355 42250575/+355 692099047
E-mail: organic@icc-al.org
Web: www.organic.org.al

BioAdria Association

One of the pioneer associations of organic farmers established in 2006. Member farmers produce organic fruits and vegetables, vineyards, olive trees, medicinal herbs, olive oil and forest fruits for the export and domestic market.

Contact: Florian Paspali, Executive Director of BioAdria Association
Address: Rr. Myslym Shyri, Tirana, Albania
Tel. +355 682071180
E-mail: flori_al@yahoo.it
Web: www.bioadria.org

EPCA Association

The only Albanian association dedicated to cultivation, wild collection and processing of organic medicinal herbs and plants, tea production and essential oils production. Many of its members are active exporters in European and US countries.

Contact: Xhevit Hysenaj, Chairman of EPCA Association
Address: Rr. Nikolla Lena, nr. 138, Tirana, Albania
Tel. +355 4 22 65925 / +355 692060915
Fax: +355 4 22 65925
E-mail: epca_mp@yahoo.com

Albanian Association of Marketing (AAM)

An organisation specialized in promotion, marketing and adding value elements of organic and typical products. The Albanian Association of Marketing is a new forum of professionals dedicated and specialized in marketing disciplines, channels and technology and other activities related to the market.

Contact: Iris Kazazi, Associate Director
Address: Blv. Zogu I, P Kirschberger, no. 2-3, Tirana, Albania
Tel. +355 4 2415 890 / +355 682093054
Fax: +355 4 2415 890
E-mail: albanianmarketingassociation@gmail.com
Web: www.garanciashqiptare.org

Organic Input Suppliers

Agro Help

Importer and trader of organic fertilizers.

Contact: Aleksander Kolaci, Technical Director
Address: Autostrada Tirane-Durrës Km 7, 2000 Durrës, Albania
Tel. +355 692055309 / +355 68 20 27 019

Lila

Importer and trader of organic fertilizers in the domestic market.

Contact: Beqar Lila, General Director
Address: Komuna e Parisit, "Alban Tirana" P 2, sh.2, 1000 Tirana, Albania
Tel. +355682047296
Fax. +355 4 2265264
E-mail: lila_beqar@yahoo.com

Agro Blend

Importing, distributing and trading organic fertilizers in Albania.

Contact: Sami Thana, General Director
Address: Vore, Tirana, Albania
Tel. +355 43 54 360 / +355 47 600 180 / + 355 68 20 55 830
Fax: +355 43 54 37
E-mail: agroblend@albaniaonline.net
Web: www.agroblend.com

Bruka Seedling

Importer and trader of organic inputs and fertilizers.

Contact: Josif Gorrea
Address: Divjake, Lushnjë, Albania
Tel. +355 371 22141
Fax: +355 371 22142
E-mail: info@brukaseedling.com
Web: www.brukaseedling.com

Perla Agro

Importing, distributing and trading organic fertilizers in Albania.

Contact: Agron Bejleri, General Director
Address: Lagjia Emin Matraxhiu, ish Konservimi, Elbasan, Albania
Tel. +355 68 2045646
E-mail: perla_agro@yahoo.com

Agroinput Jazxhi

Importing, distributing and trading organic fertilizers in Albania.

Contact: Engjell Jazxhi
Address: Autostrada Tirane - Durrës, km.7, 500 m me poshte se QTU, Tirana, Albania
Tel. +355 68 2026643
E-mail: engjell_jazxhi@yahoo.com

Basff

Trading and distributing organic inputs in Albania.

Contact: Vasar Huqi, General Director

Address: Maminas, Durrës, Albania

Tel. +355 682027019

Copper Terra (Ndoni)

Trading and distributing organic inputs in Albania.

Contact: Nikoll Ndoni, General Director

Address: Lushnjë, Albania

Tel. +355 692066654

Alba Seed

Trading and distributing organic inputs in Albania.

Contact: Gezim Bezhi, General Director

Address: Unaza e Re, Durrës, Albania

Tel. +355 686074044

Arli International

Trading and distributing organic inputs in Albania.

Contact: Agim Rametaj, General Director

Address: Maminas, Durrës, Albania

Tel. +355 682031715

Dritan Kolleshi

Trading and distributing organic inputs in Albania.

Contact: Dritan Kolleshi, General Director

Address: Dushk, Lushnjë, Albania

Tel. +355 69 2166770

E-mail: dritankolleshi@yahoo.it

Baudin Begaj

Trading and distributing organic inputs in Vlorë region for the organic producers of the region.

Contact: Baudin Begaj, General Director

Address: Vlorë, Albania

Tel. +355 69 2857125

Organic Extension

Ministry of Agriculture, Food and Consumer Protection (MoAFCP) – Directory of Extension service and agriculture information

Transfer Centres in Fushe, Kruje, Lushnjë, Vlorë, Korçë, Shkoder

Contact: Tatjana Dishnica, General Director

Address: Sheshi Skenderbej, nr.2, Tirana

Tel. +355 4 2223269

E-mail: tatjana.dishnica@mbumk.gov.al

Web: www.mbumk.gov.al

Institute of Organic Agriculture

Local institute specialized in extension services for organic farming

Contact: Enver Isufi, General Director

Address: Godina e Labororit te Mbrojtjes se Bimëve, Shkozet, Durrës

Tel. +355 692087205

E-mail: eisufi@ibb-albania.org

Web: www.ibb.al

Institute of Quality for Integration

Local institute specialized in extension services for organic

Contact: Bujar Basha, Stefan Dano

Address: Rr. Shyqyri Ishmi 17, Tirana

Tel. +355 4 2230 955

E-mail: bujar.basha@ici.al;

stefandano@yahoo.com

Web: www.ici.al

Certification Bodies

Albinspekt

Local inspection certification body with international recognition, EU accredited. Inspection according to national and different international standards

Contact: Sokol Stafa, General Manager

Address: Sheshi Hari Trumen', Nd.1, Hy.25, Ap.10, 1016 Tirana

Tel. +355 4 2238 554

E-mail: contact@albinspekt.com

Web: www.albinspekt.com

ICEA

Italian certification body with Albania branch

Contact: Xhevaire Dulja, country representative

Address: P.O.Box 51 (Albapost), Tirana

Tel. +355 692177532

E-mail: xhevid@yahoo.com

Web: www.icea.info

CERES

International certification body

Contact: Sokol Stafa, Representative in Albania

Address: Sheshi Hari Trumen', Nd.1, Hy.25, Ap.10, 1016 Tirana

Tel. +355 4 2238 554

E-mail: contact@albinspekt.com

Web: www.ceres-cert.com

Bio Inspecta AG

International certification body, specialized on Switzerland (BioSuisse Standard)

Contact abroad: International Secretariat

Tel. +41 62 865 63 00

E-mail: contact@albinspekt.com

Web: www.bio-inspecta.ch

Retailers with Organic Products

Mercator

Slovenian supermarket chain in Albania

Contact: Sajmir Qajalliu

Address: Qendra Tregtare City Park, Autostrada Tirane - Durrës

Tel. +355 694081952

E-mail: sajmir.qajalliu@mercator.al

Web: www.mercator.al

Airport Duty Free Shop

Shop trading Albanian organic and typical products

Contact: Eriela Velaj

Address: Tirana International Airport

Tel. +355 662071961

E-mail: erilavelaj@hotmail.com

Web: www.garanciashqiptare.org

Durrës Market

A small retailing shop and organic fresh products

Contact: Fatmir Kallbaqi

Address: perballe Drejtorise se Tatimeve and Tregu i Gjëlber, Durrës

Tel. +355 693822415

Web: www.garanciashqiptare.org

Vlorë Market

A small retailing shop and restaurant with organic and typical food

Contact: Mendim Bacaj

Tel. +355 682209469

Address (retail POS): Bulevardi Kryesor ne dalje te Vlores

Address (restaurant): PALMA Restaurant-Hoshtime Vlorë, rruga e vjeter Fier Vlorë, ne hyrje te Vlores. Contact: Hair Xhafaj

mob. +355 692731182

Web: www.garanciashqiptare.org

Shkodra Market

A small retailing shop and two restaurants with organic and typical food

Contact: Teofik Fugarini

Tel. +355 673127362

Address (retail POS): Bulevardi Kryesor prane 5 heronjve, Shkoder

Address (restaurant): ARDIS Restaurant-Zues-rruga drejt kufirit në Muriqan. Contact: Ndrim Duli, mob. +355 674035620

Address (restaurant): Qafeshitiqen Restaurant-rruga nacionale drejt Velipojes, Contact: Zydi Rama

mob. +355 672943367

Email: iriskazazi@msn.com

Web: www.garanciashqiptare.org

Mobile Food Shop

An innovative marketing tool for promoting and trading qualitative typical and organic Albanian products with added value in highly frequented places in Tirana and Durrës neighbourhoods

Contact: Ruzhdi Koni, General Director of AgroKoni Company.

Address: Maminas, Tirana

Tel. +355 682026534

Email: president@agrokoni.com

Web: www.agrokoni.com

Other

Chefs Club "Taste of Peace"

An association of Chefs aiming to promote organic and typical Albanian food by offering dishes traditionally prepared in different restaurants in Tirana and in tasting activities and fairs for promoting Albanian products and gastronomic values.

Contact: Mimoza Balla, Taste of Peace manager

Address: Rr. Robert Zvarc, Pall. Alblogic, Tirana

Tel. +355 673035699

Email: moza_balla@hotmail.com

