

THE STATE AND PERSPECTIVES OF ORGANIC AGRICULTURE IN SERBIA

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FOREWORD

Organic production in Serbia has an excellent possibilities and represents a great opportunity for our country, due to high demand for these types of products in the world as well as here. Larger area under organic production, more producers, and bigger export rate show that the interest for this production in Serbia exists.



Organic production is extremely demanding and requires knowledge as well as investments in production and processing. For that reason in recent years Serbia allocated significantly higher subsidies for organic plant production. Organic producers can get 400% more funds than the conventional one, which is 10 times more than just four years ago.

Moreover, Serbia made a step further on a harmonization of the national laws with the EU legislation. The new Rulebook on regulation of the methods of the organic production, system of control and certification, as well as organic wine production, a completely new scope, have been adopted.

At the moment a new Law on organic production is being prepared.



DEVELOPMENT OF ORGANIC PRODUCTION IN SERBIA

The history of organic food production and processing goes back for more than thirty years.

In the last three decades institutional development, organization within sector, market development and public awareness is noticeable, and legislative framework is being harmonized to the EU legislation continuously.

Development of organic production in Serbia had passed some important turning points streaming its development.

This year (2022) is exactly:

- **32 years from the first export,**
- **32 years from the civil society development,**
- **22 years from the first Law on organic agriculture,**
- **12 years from the first Law on organic production prepared in accordance to the EU legislations,**
- **13 years from the Nation Association Serbia Organica foundation.**



OVERVIEW OF ORGANIC PRODUCTION IN SERBIA

Statistics

In the last decade, according to the statistics, organic production has strong upward direction and is characterized by:

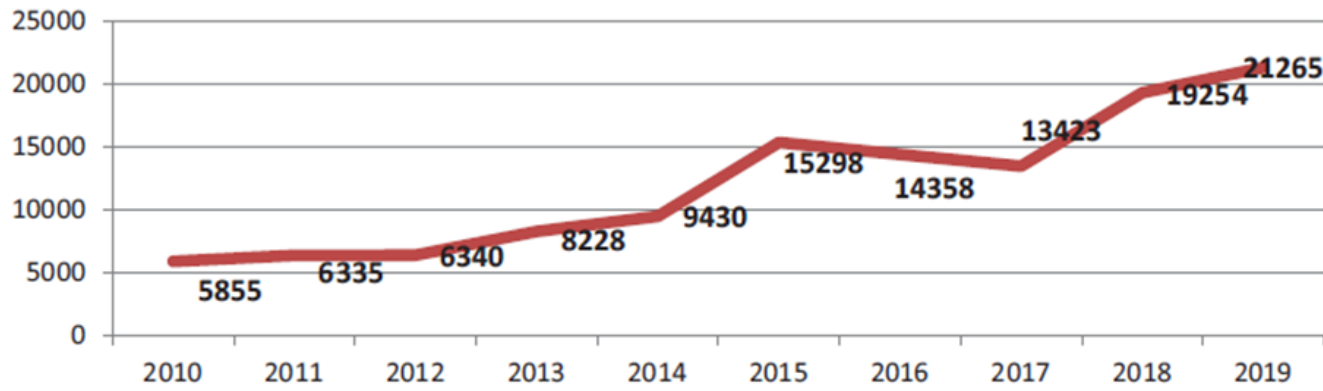
- increase of areas under organic production,
- development of livestock production,
- more organic producers,
- development of processing sector,
- market grows,
- export rises.



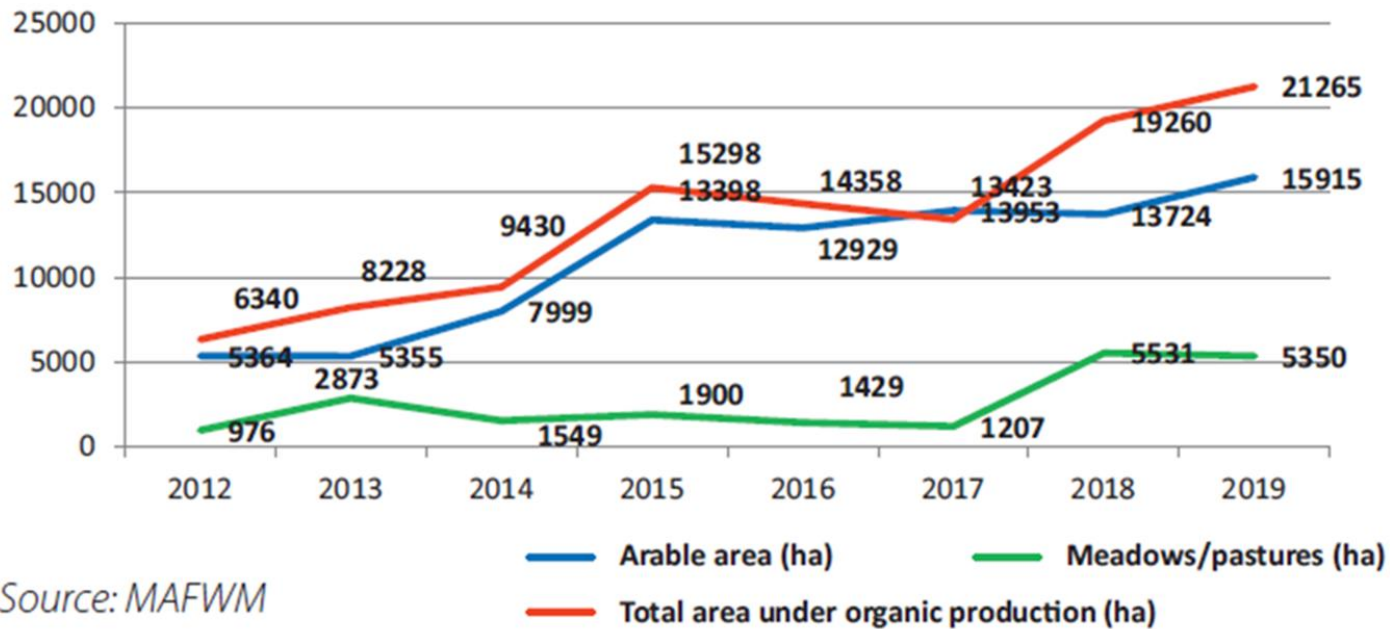
Area under organic plant production (2010-2019)

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Area under organic production (ha)	5.855	6.335	6.340	8.228	9.548	15.298	14.358	13.423	19.254	21.265
Total arable land (ha)	2.784	3.007	5.364	5.355	7.999	13.398	12.929	11.875	13.723	15.915
Pastures and meadows (ha)	3.071	3.327	976	2.873	1.549	1.900	1.429	1.548	5.531	5.350

Total area under organic production (2010-2019)



Area under organic production 2012-2019



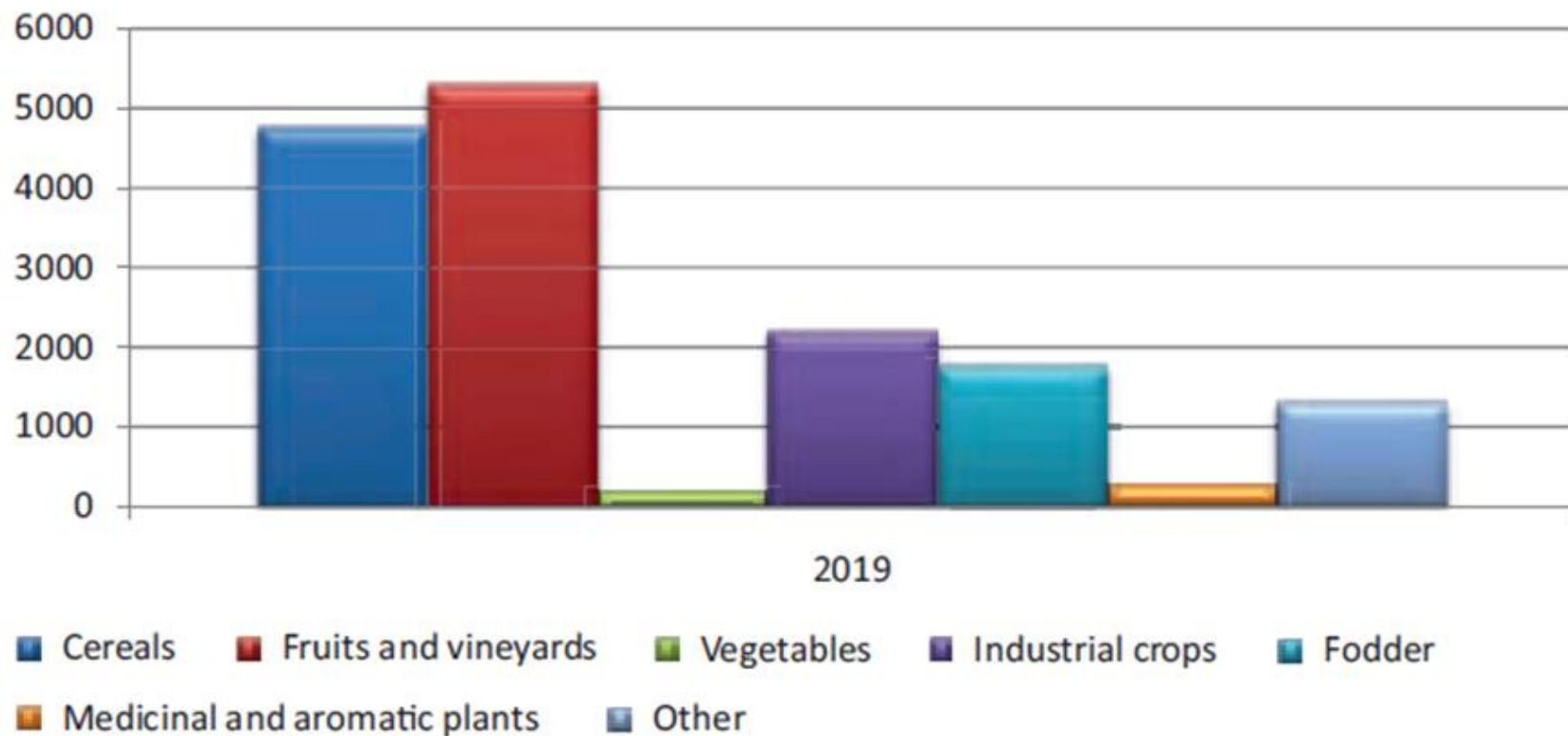
Source: MAFWM

Organic plant production structure (2012-2019)

Type of crop production (in ha)	2012	2013	2014	2015	2016	2017	2018	2019
Cereals	2.522	2.273	2829	4.252	4.607	3.662	3.614	4.788
Industrial crops	541	673	1.228	2.674	2.918	2.291	1.962	2.226
Fodder crops	663	595	1.204	1.440	1.349	1.211	1.336	1.797
Vegetables	114	107	154	171	184	230	199	184
Fruits and vineyards	1.416	1.484	2.208	2.895	3.531	4.056	5.883	5.324
Medicinal aromatic plants	28	133	61	71	113	115	193	261
Other	80	90	316	1.895	227	312	536	1.332
Total arable area	5.364	5.355	7.999	13.398	12.929	11.874	13.723	15.915
Meadows/pastures	976	2.873	1.549	1.900	1.429	1.548	5.531	5.349

Source: MAFWM

Structure of the arable land according to the crop type in 2019



Source: MAFWM

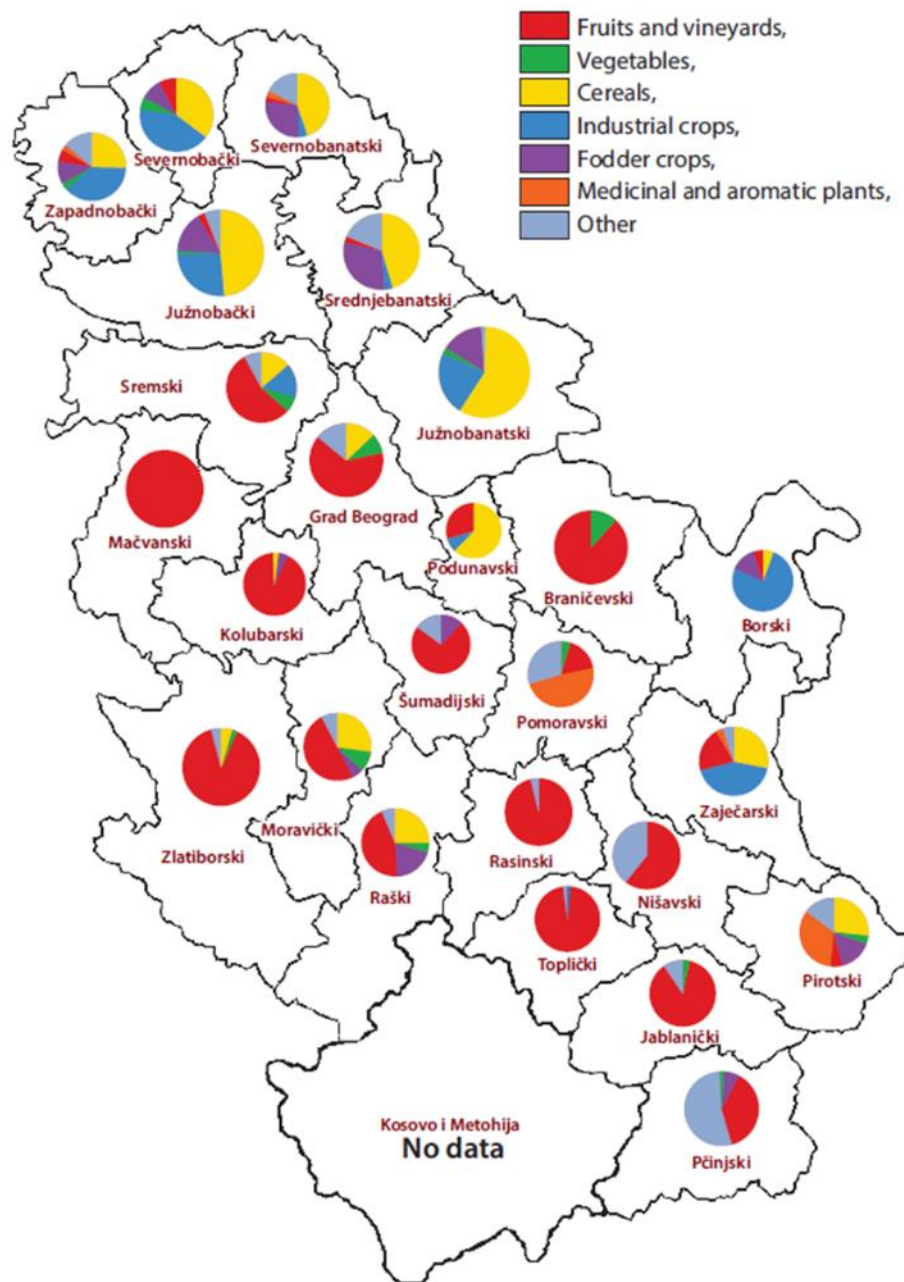
The biggest share of the area is under fruit production, cereals and industrial crops, while vegetables, medicinal and aromatic plants are produced on smaller area.

Proportion of organic production in the total utilized agricultural land (2010-2019)

Year	Area under organic production (ha)	Organic area share of total utilized land (in %)
2010.	5.855	
2011.	6.335	
2012.	6.340	0,18
2013.	8.228	0,23
2014.	9.548	0,28
2015.	15.298	0,44
2016.	14.358	0,41
2017.	13.423	0,38
2018.	19.254	0,55
2019.	21.265	0,61

Source: MAFWM

Regional distribution of organic plant production in Serbia, 2019



Organic livestock production in Serbia (2012-2019)

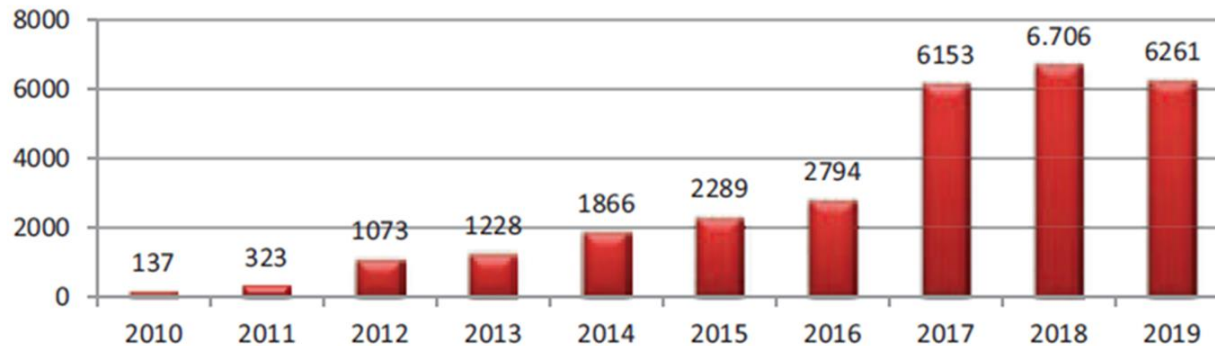
Type of animal	2012	2013	2014	2015	2016	2017	2018	2019
Sheep	2.837	4.031	3.153	4.848	4.378	4.665	5.138	7.220
Pigs	206	175	76	232	283	87	284	386
Cattle	1.428	2.176	2.726	2.746	2.895	3.094	3.594	4.625
Goats	211	946	1.154	1.686	1.406	2.048	1.486	536
Poultry	2.034	1.390	1.140	1.380	3.158	4.415	6.735	29.880
Donkeys	7	21	17	20	2	47	/	/
Horses	66	210	173	218	165	177	114	73
Beehives	961	1.940	894	2.504	2.878	2.307	3.061	10.855

Source: MAFWM



Organic producers (2010-2019)

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Certified producers	137	323	237	258	291	334	390	434	500	534
Cooperants			836	970	1.575	1.955	2.404	5.719	6.206	5.727
Total	137	323	1.073	1.228	1.866	2.289	2.794	6.153	6.706	6.261



Source: MAFWM



LEGISLATIVE AND INSTITUTIONAL FRAMEWORK

Organic production regulations - Institutional framework:

- preparing professional basis for drafting the regulations in the area of organic production;
- collecting annual reports from control bodies;
- accumulating records on organic production;
- maintaining a list of authorized controlling bodies;
- checking if organizations for control and certification of organic production have met criteria;
- approving deviations from the methods of organic plant and livestock production and the processing rules in organic production;
- approving usage of reproduction material from conventional production after the period of conversion;
- shortening or extending period of conversion.



In accordance with the Law on Organic Production, the Expert Council for organic production was formed by the Ministry of Agriculture, Forestry and Water Management in 2011 to review technical issues, provide expert opinions and participate in the implementation of project tasks related to:

- plans and special programs in the field of organic production;
- proposing topics for professional training of staff;
- advising on regulations' drafting in the field of organic production;
- counselling on improvement of organic production, and
- working on other necessary tasks related to organic production.

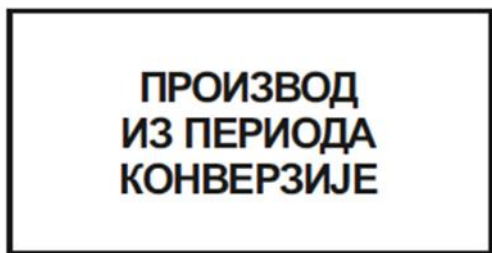


Organic products' labelling

Serbian national logo for organic products



Serbian national logo for products in conversion

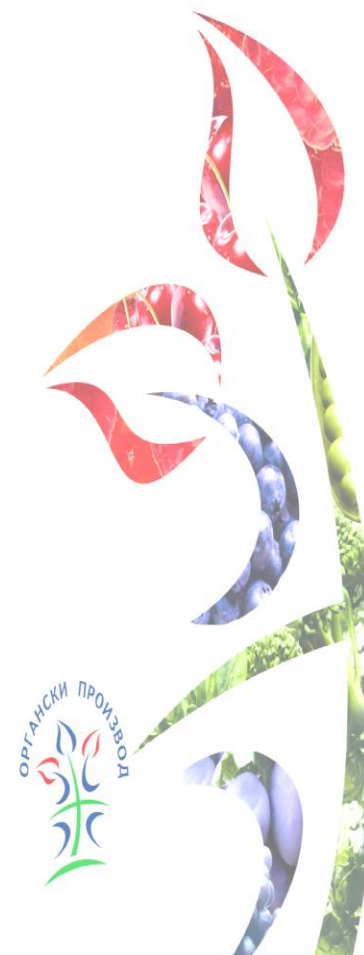
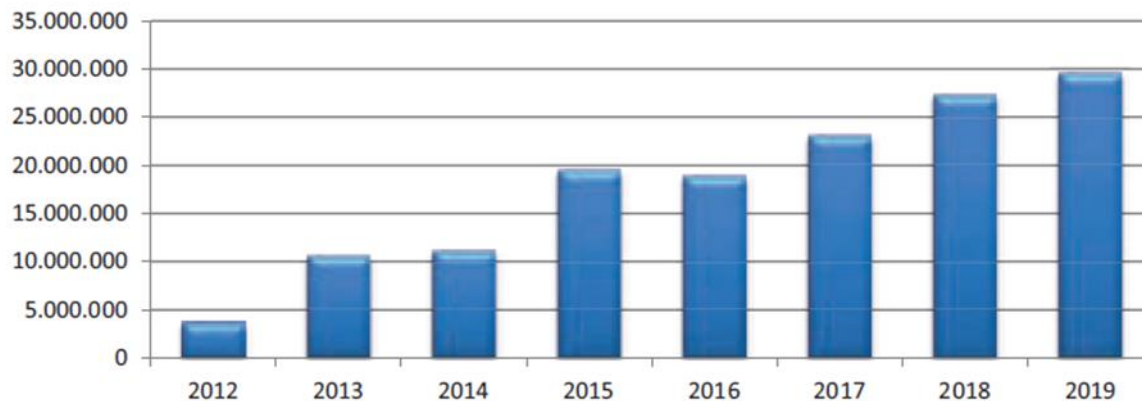


MARKET OF ORGANIC PRODUCTS

Value of exported organic products (2012 - 2019)

Year	Export value (in mil. EUR)
2012.	3,74
2013.	10,7
2014.	11,2
2015.	19,6
2016.	18,9
2017.	23,1
2018.	27,4
2019.	29,7

Export of organic products (2012 - 2019) in mil. EUR

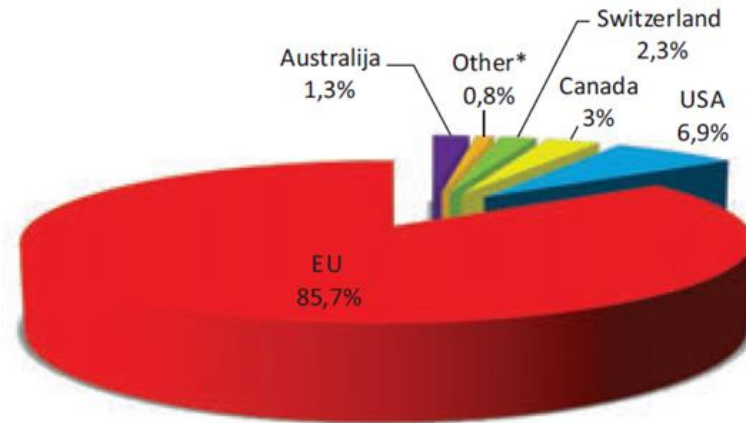


Value of exported organic products in 2018 and 2019 by countries

Countries	Export value in 2018 (in million EUR)	Share (%)	Export value in 2019 (in million EUR)	Share (%)
EU	21,94	80	25,45	85,7
USA	1,96	7,2	2,06	6,9
Canada	2,44	8,9	0,89	3
Switzerland	0,49	1,8	0,68	2,3
Australia	0,22	0,8	0,38	1,3
Other	0,35	1,3	0,24	0,8
Total	27,4	100%	29,7	100%

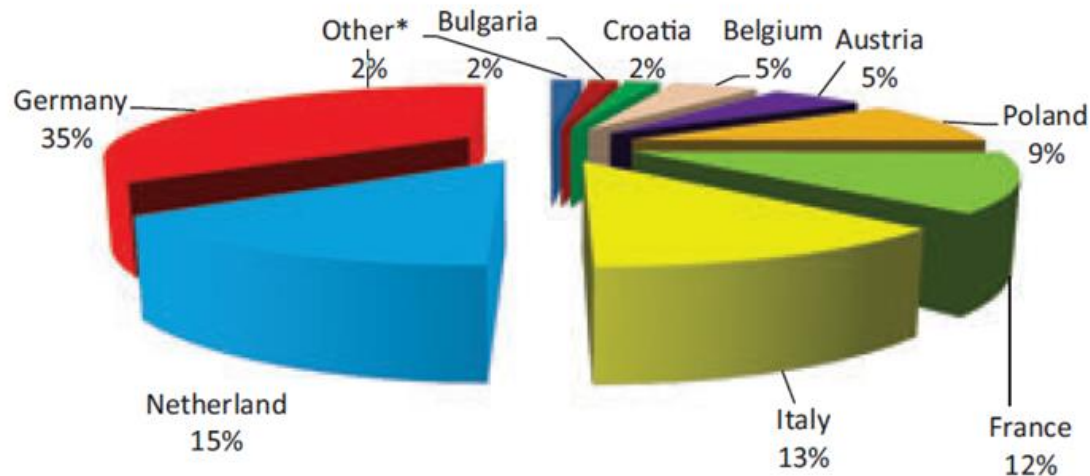


Breakdown of exported organic products from Serbia, 2019



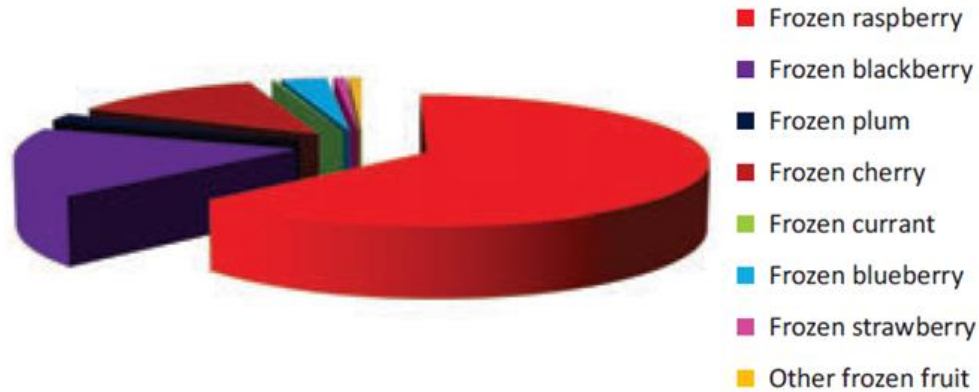
** Belarus, India, Israel, Japan, South Korea, Chile*

Breakdown of values of exported organic products by exported country in the EU, 2019

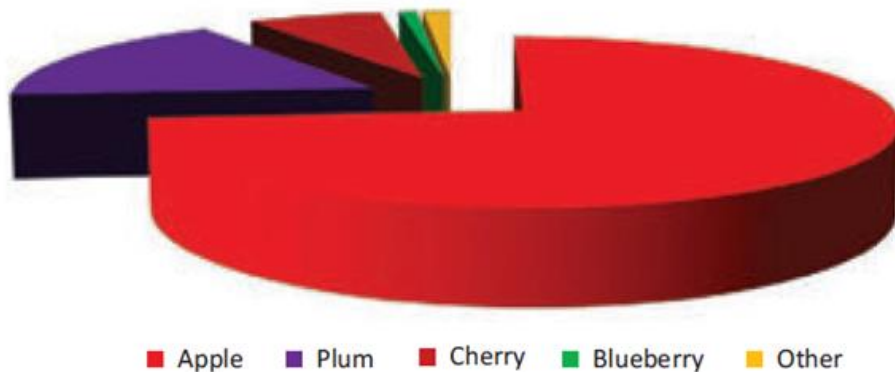


** Denmark, Hungary, Slovakia, Slovenia, Czech Republic, Sweden, United Kingdom*

Breakdown of exported frozen organic fruits from Serbia, quantity, 2019.



Breakdown of exported fresh organic fruits according to quantity, in 2019



AGRICULTURE AND RURAL DEVELOPMENT POLICY ON THE ROAD TO THE EUROPEAN UNION

National program significant for organic production

- Organic production development plan

The plan for the development of organic production contains eleven goals:

Goal 1: Support for organic production as an integral part of the national agricultural policy and the rural development policy.

Goal 2: Harmonization of the legislative framework for organic production in line with EU legislation.

Goal 3: Institutional development.

Goal 4: System of control and certification is operational and harmonized with EU standards.

Goal 5: An accessible and market-oriented advisory sector.

Goal 6: Research in the field of organic production and processing is applied on the field.

Goal 7: Improving organic production through formal education.

Goal 8: Development of the domestic market of organic products.

Goal 9: Growth of exports of organic products.

Goal 10: Setting more favorable conditions for the production and processing of organic products.

Goal 11. Implementation and monitoring of the realization of goals and measures defined by the plan.

Negotiations with European Union - Chapter 11

The opening benchmarks for Chapter 11 were:

- 1) That the Republic of Serbia ought to present an Action Plan to the European Commission, which will serve as a basis for the transposition, implementation and enforcement of the European Union acquis in agriculture and rural development.
- 2) That the Republic of Serbia ought to submit the request for entrustment of budget implementation tasks for IPARD II to the European Commission, in accordance with the provisions of EC Implementing Regulation 447/2014.

National measures of support in agriculture and rural development

Types of subsidies:

- direct payments,
- rural development measures,
- specific subsidies,
- credit support.



National support measures for organic production

According to the Law on subsidies in agriculture and rural development (“Official Gazette” RS No. 10/2013, 142/2014, 103/2015 and 101/2016), subsidies for organic plant production are given for production costs and fuel and/or fertilizer and/or seeds, per hectare.

Budget allocated for organic production in 2014 - 2020 (RSD)

2014	2015	2016	2017	2018	2019	2020
93.750.000	92.000.000	92.000.000	90.000.000	110.000.000	117.320.000	350.000.000

KÖSZÖNÖM A FIGYELMET!

THANK YOU FOR YOUR ATTENTION!

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