



REPUBLIC OF SERBIA

Negotiating Group 11 - Agriculture and Rural Development

Bilateral Screening

HONEY

Brussels

14 – 16 May 2014





CONTENT OF THE PRESENTATION

- Legal background
- Basic information
- Honey production
- Structure of apiculture production
- Trade
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LEGAL BACKGROUND

- Law on Agriculture and Rural Development (OG RS No 41/09, 10/13)
- Law on Subsidies in Agriculture and Rural Development (OG RS No 10/13)
- Law on Veterinary Medicine (OG RS No 91/05, 30/10)
- Law on Animal Husbandry (OG RS No 41/09, 93/12)
- Law on Food Safety (OG RS No 41/09)
 - * Rulebooks, Regulations based on these laws



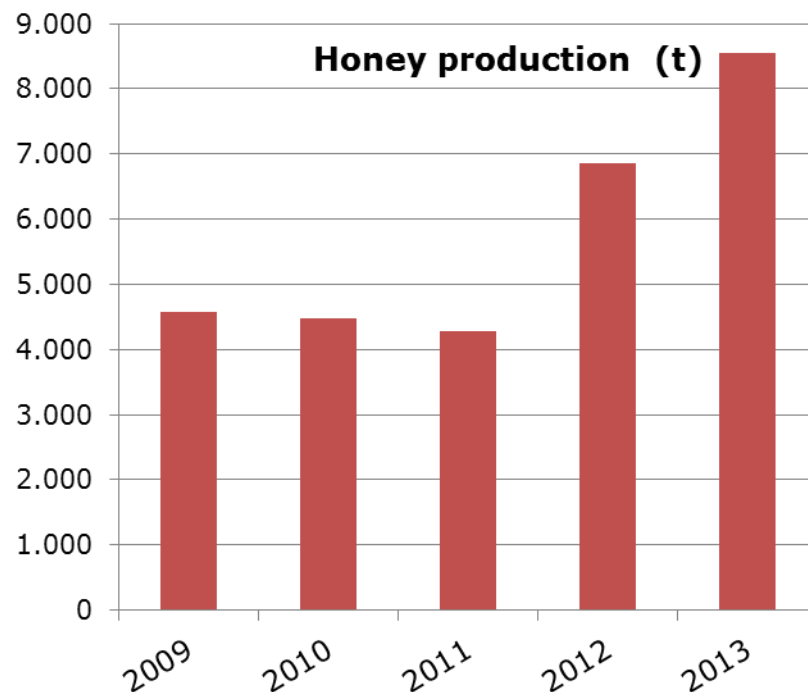
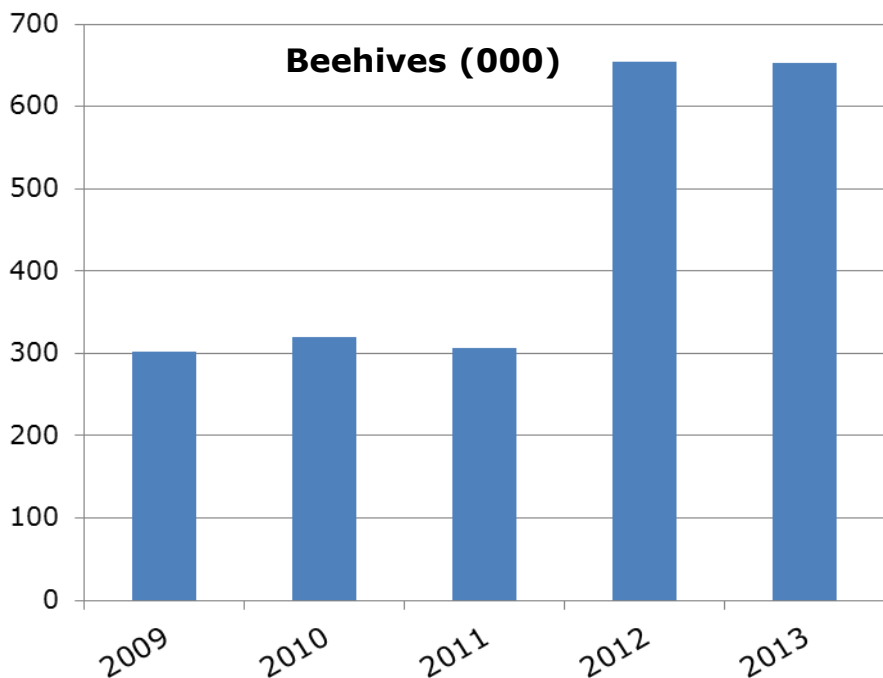
BASIC INFORMATION

- Tradition in production
- Small but very attractive agricultural activity
- Greatest importance in the pollination of plants
- Share in agricultural production 0,4%
- Share in livestock production 1%
- Different types of honey that originate from Serbia are of high quality and can be classified into several varietal groups: acacia, meadow, tilia, sunflower honey, honeydew, and several species of exotic honeys (sage, chestnut, winter savory)
- Lisbon Convention protects several types of honey on the international market on the basis of their geographical origin



HONEY PRODUCTION

	2009	2010	2011	2012	2013
Beehives (000)	302	320	306	654	653
Honey production(t)	4,577	4,479	4,283	6,865	8,554



Source: Statistical Office of the Republic of Serbia

Data for 2012 are estimated on the basis of the first Agricultural Census data. Data for 2013 are obtained by implementation of a new sample for Livestock Survey based on Agricultural Census data.



STRUCTURE OF BEEKEEPING PRODUCTION

- According to agricultural census data 2012 number of beehives were 665,000, at 31,000 holdings

Ownership structure:

- Biggest number of beehives (98.3%) were owned by private holdings
- Only small number of beehives were owned by companies

Professional beekeepers (over 150 beehives):

There are 266 professional beekeepers with 69,946 beehives in total

Of that: 252 (94.7%) were family holdings and 14 (5.3%) were legal entities.



STRUCTURE OF BEEKEEPING PRODUCTION

- From 2013:
 - Every apiary has unique identification number
 - Every beehives is marked
 - All information are stored in Central database (led by Veterinary directorate)

- Present situation:
 - 557,337 beehives
 - 12,653 registered beekeepers
 - 341 professional beekeepers.





TRADE

In 2013 2.6 thousand tons of honey were purchased (33.6% more than 2012)

1.3 thousand tons have been sold on green markets

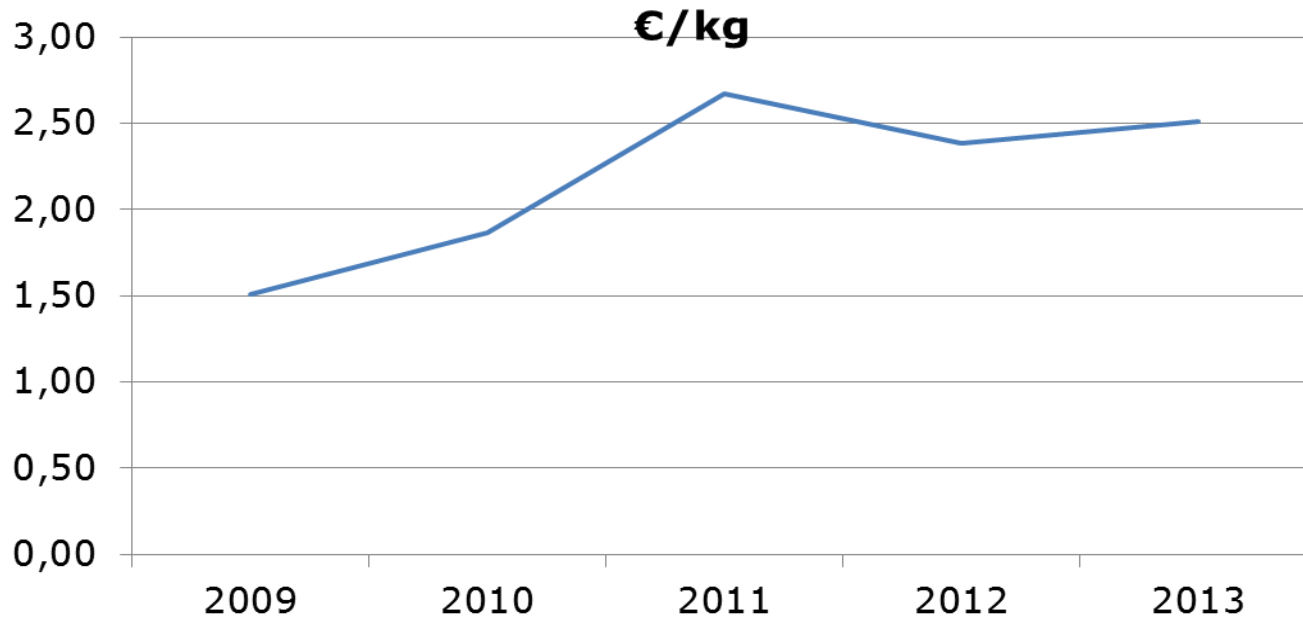
Source: Statistical Office of the Republic of Serbia





TRADE

Statistical Office of the Republic of Serbia monitored on annual basis average purchase price for a kg of honey.



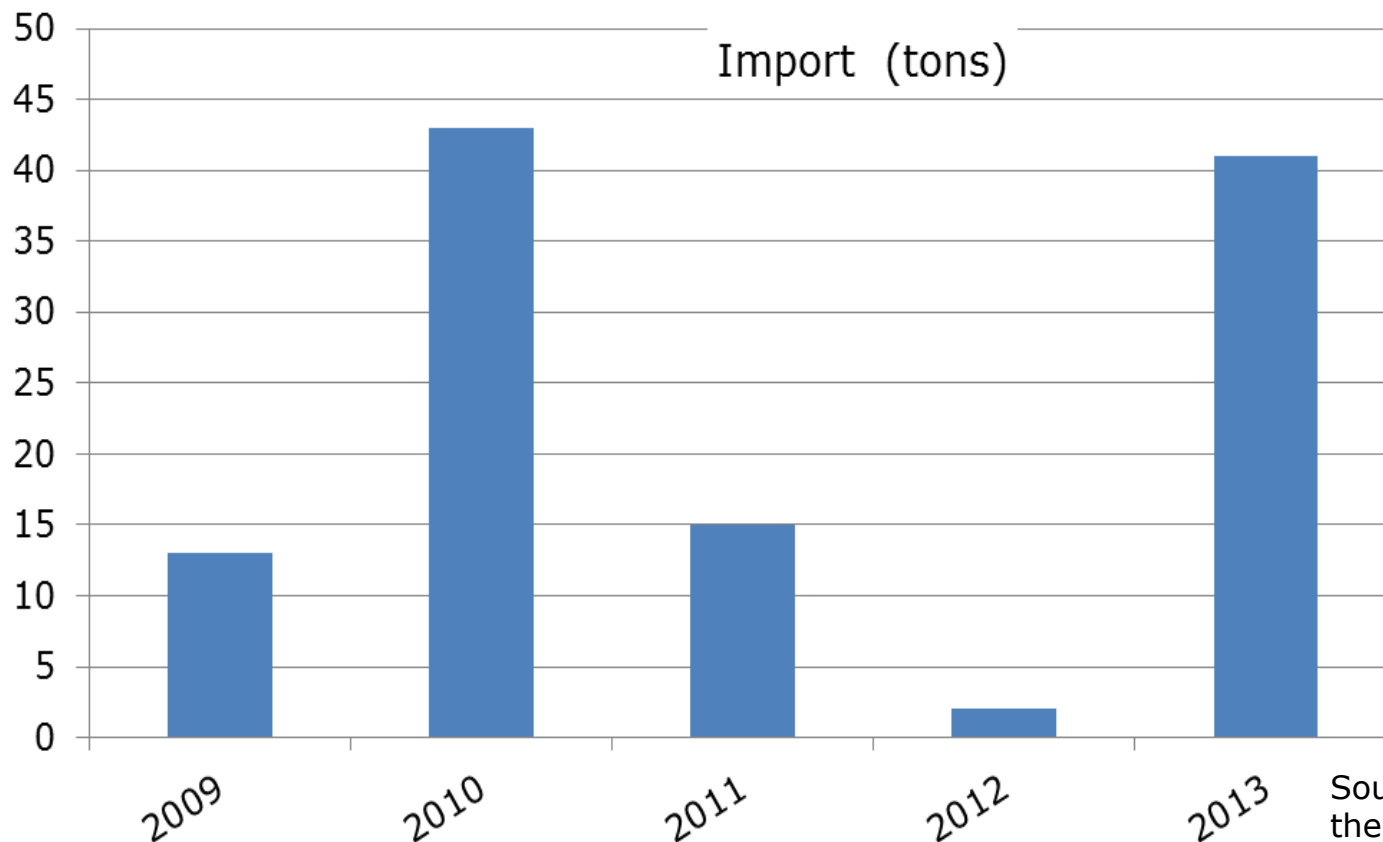
Source: Statistical Office of the Republic of Serbia

Beekeepers, members of the Beekeeping Association of Serbia (SPOS) through the website of the association (http://www.spos.info/berza_meda.php) advertised their offer to sell the honey



IMPORT OF HONEY

- Low level of import;
- Biggest import in 2010 – 43 tons of honey;
- Biggest share from Republic of Macedonia



Source: Statistical Office of the Republic of Serbia



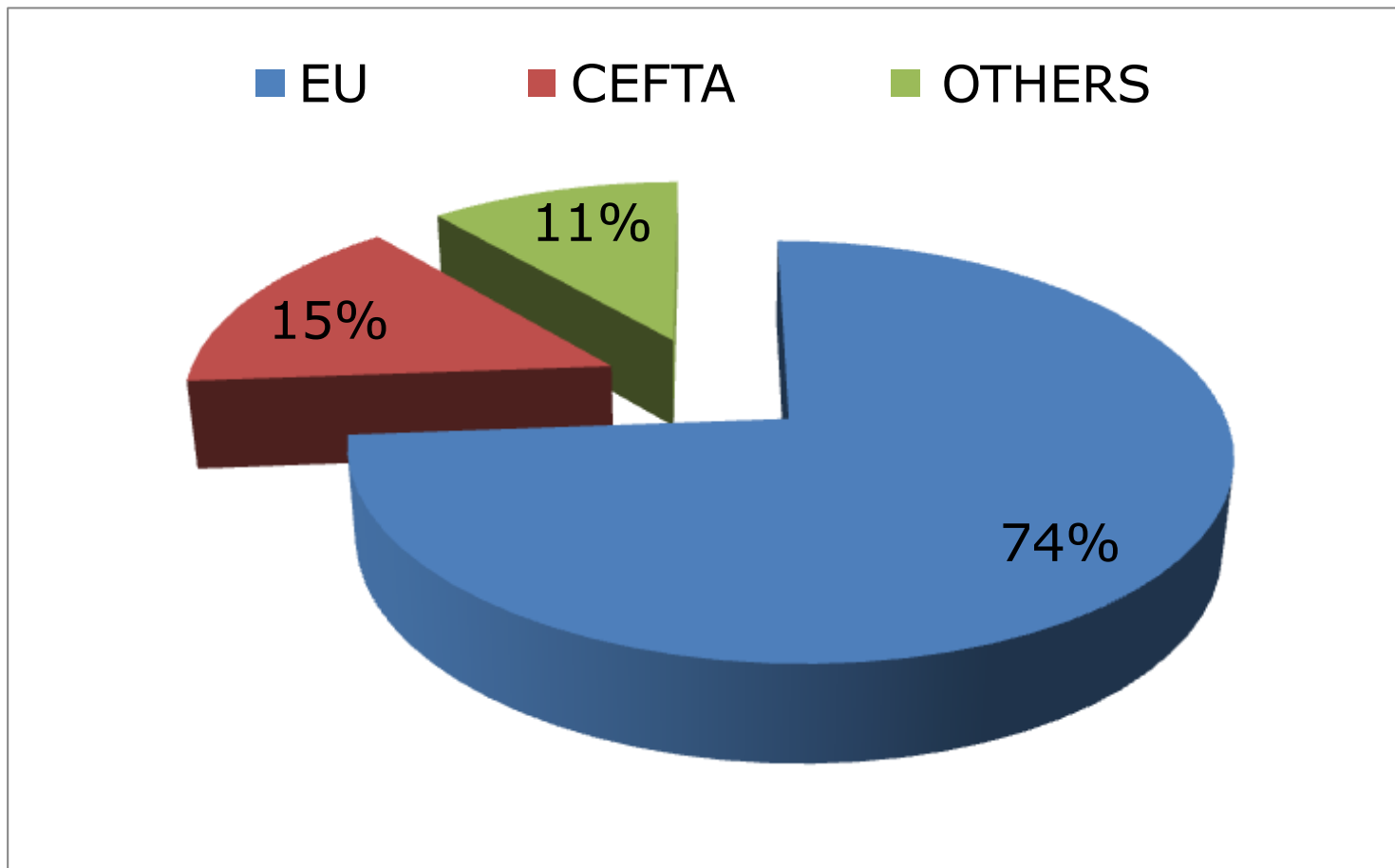
EXPORT OF HONEY

- Increase of export;
- In 2013 almost 3,400 tons
- EU (Germany, Italy and Austria)
- CEFTA (FYR of Macedonia, Montenegro and Bosnia and Herzegovina)
- 7 EU export facilities.





EXPORT BY DESTINATION in 2013





MARKETING STANDARDS

Legal framework:

Rulebook on quality of honey and other requirements for honey, other bee products, products based on honey and other bee products (OG FRY No 45/03)



SUBSIDIES

-500 RSD \approx 4,3 € per beehives.

-40% additional payment for organic production





COMPARISON OF LEGISLATION

EUROPEAN UNION	SERBIA
National apiculture program	NO
The measures linked with apiculture program	NO
Honey definition	YES
Criteria for honey composition	YES
Types of honey according to the method of manufacture	YES
Origin of honey	YES



FUTURE STEPS

- Changes of existing legislation
- Adoption of national apiculture program
- Increasing of institutional capacity
- Implementation of changed legislation



THANK YOU FOR YOUR ATTENTION