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# **The strategy of marketing channel development in agribusiness of the Republic of Serbia**

## **- A b s t r a c t -**

Research results indicate that, in comparison with Serbia, developed market economies attach much more importance to marketing channels in agribusiness. Marketing channels constitute an inevitable precondition for agricultural, rural and the total economic development. Structural changes typical of developed countries are characterised by an important shift in marketing channel participants. These changes are especially noticeable in the strengthening of retail position.

In Serbia, the analysis of agribusiness development has so far mostly dealt with comparative and not competitive advantages. A low level of competitiveness and profitability in marketing channels has an immediate impact on the scope and structure of Serbian exports of agricultural and food products. The marketing channels quantitatively presented in the paper for the selected agricultural products indicate that the most frequent form of trade is the consumption within family farming households for the satisfaction of their own needs. Research has also shown that this situation is strongly influenced by underdeveloped marketing channels and a lack of long-term co-operation with food manufacturers and processors. Vertical co-operation and integration may be the solution to the problem of limitations facing both manufacturers and retailers. Partnership relationships between manufacturers and retailers aimed at the improvement of corporate performance form the basis for the new marketing channel structure.

The main conclusion of the research is that in order to survive in the globally competitive market Serbian agriculture needs to ensure synchronised production and its strong integration with retail outlets of agricultural and food products within short and long food supply chains, similar to developed economies. Therefore, the paper predominantly deals with organisational problems in the field of modern agribusiness, aiming to point out the need for transforming the role which modern trade has in the connection of various participants in a modern food supply chain.

Key words – agribusiness system, family farming household, strategy, marketing channels, competitiveness

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3.3.	- .....	23
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4.1.	- .....	26
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4.5.	.....	35
II.	.....	39
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2.	- .....	41
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4.	.....	44
4.1.	.....	45
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III.	.....	62
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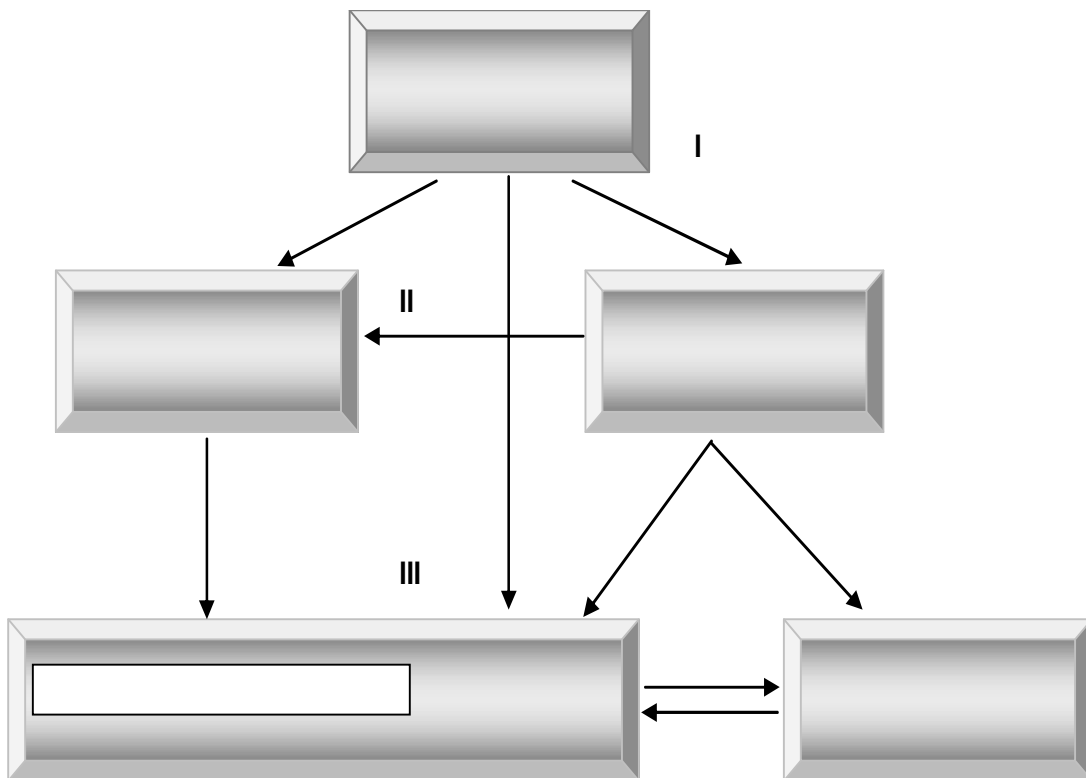
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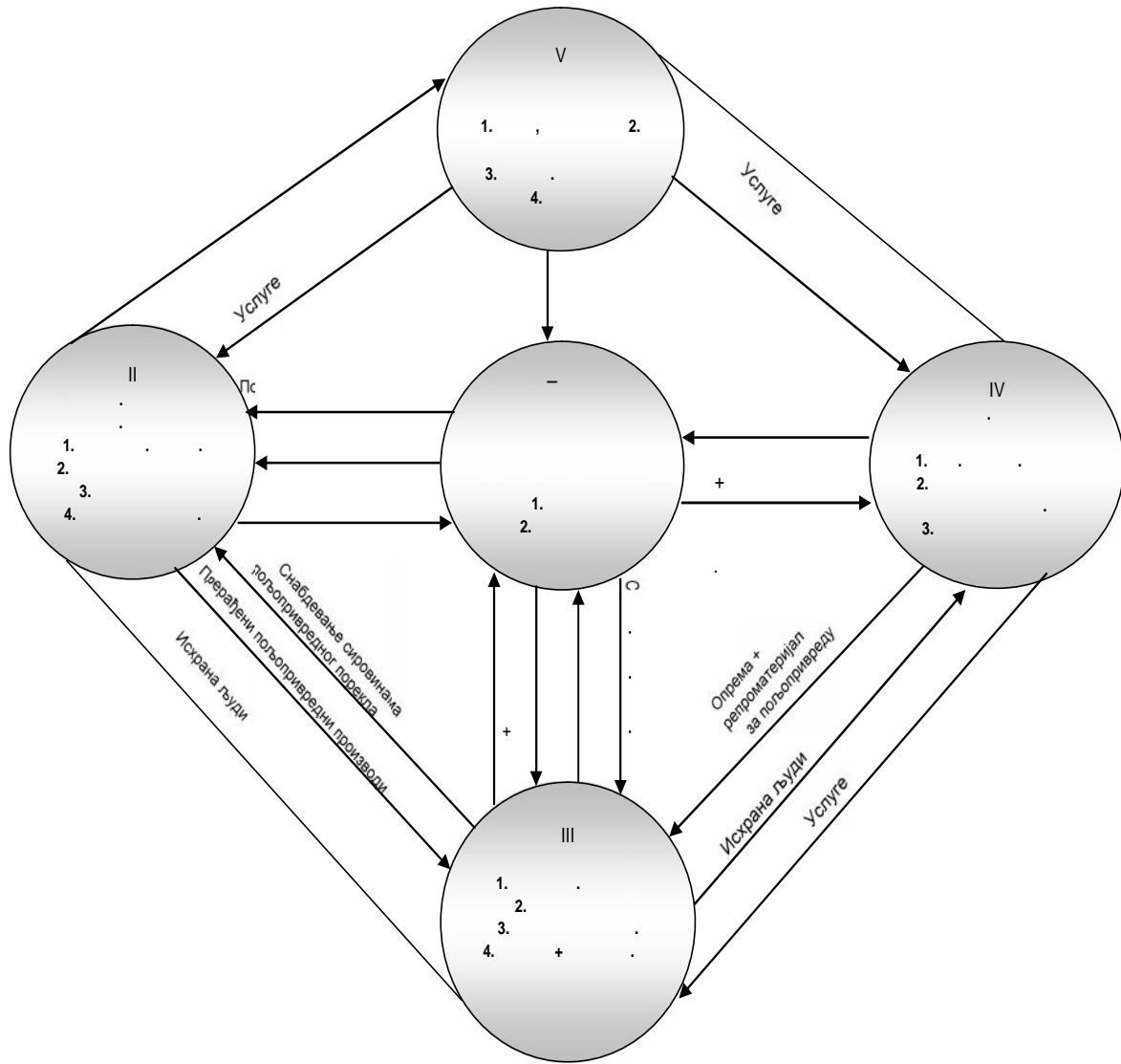
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<sup>1</sup> 2005, . 265-285  
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<sup>4</sup> Ceranic, S., Maletic, R., Jankovic Soja S., Small and medium enterprises as support to development of agrobusiness of RS, The role of knowledge, innovation and human capital in multifunctional agriculture and teritorial rural development, Thematic proceedings, European association of Agricultural Economist, Belgrade, 2009, pg 141-147

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<sup>6</sup> Ballou, R., *Business Logistics Supply Chain Management*, Pearson Prentice Hall, New Jersey, USA, 2004, pg 6

<sup>7</sup> Lysons, K., Gillingham, M., *Purchasing and Supply Chain Management*, 7th Pearson Education Limited, Edinburgh, UK, 2006, pg 109-112

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: IFOAM Training manual on Organic Agriculture in the Tropics, FiBL, 2002, pg 21-24

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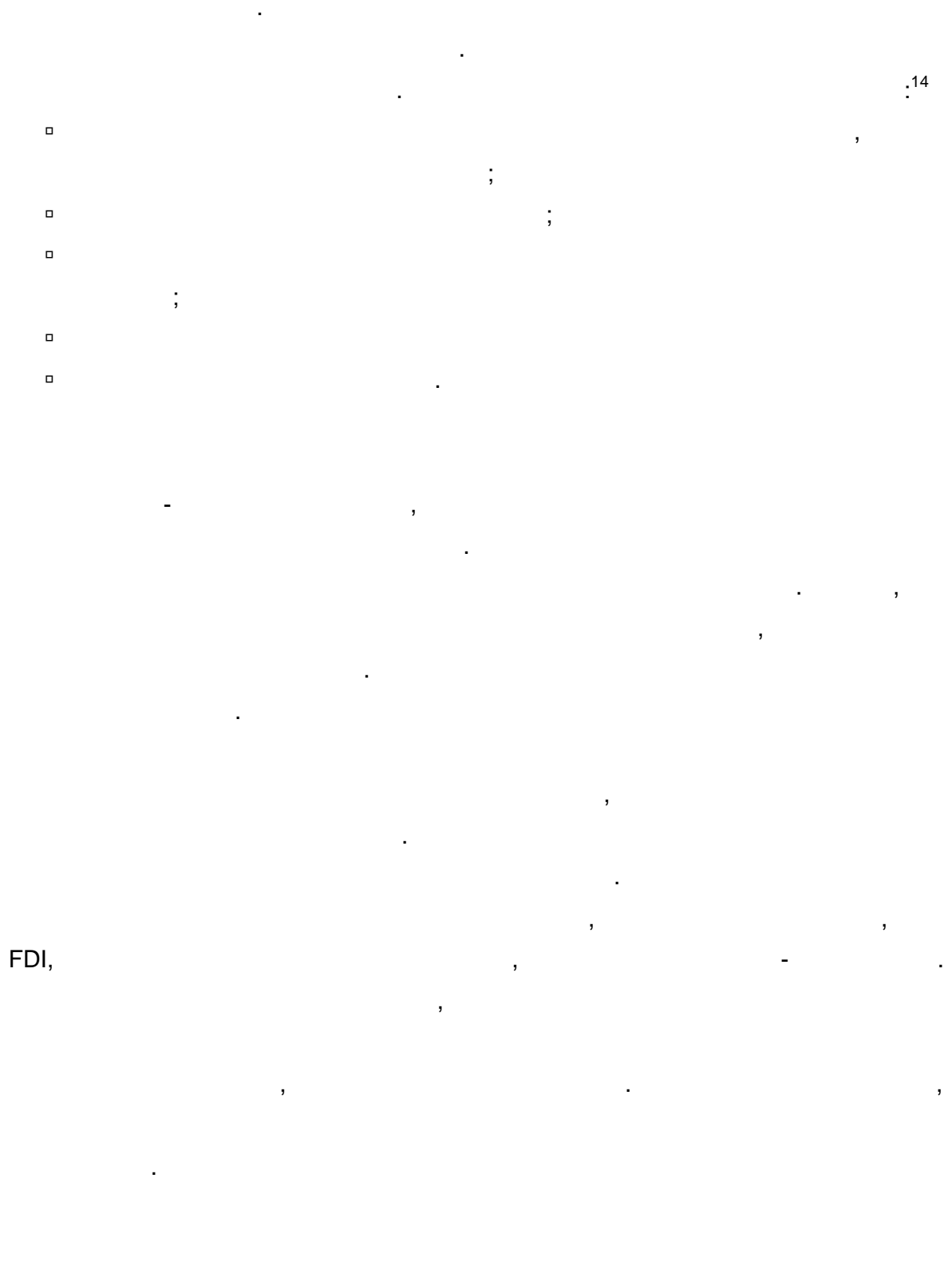


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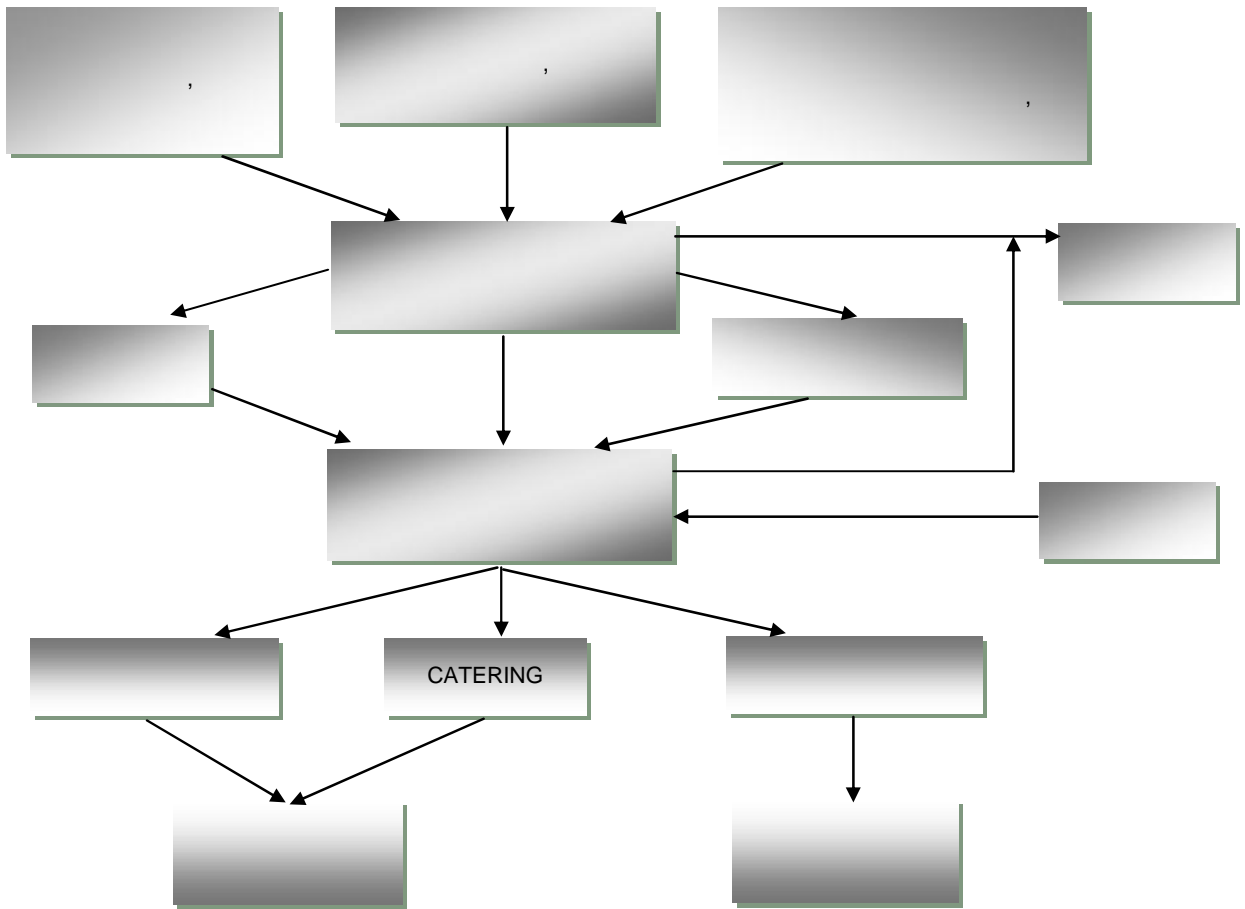




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<sup>16</sup> Alizadeh, A. Nomikos, N. 2005. Agricultural reforms and the use of market mechanisms for risk management. A study commissioned by the Futures and Options Association. March 2005. London, UK, Centre for Shipping, Trade Finance, Cass Business School.  
[www.foa.co.uk/publications/agricultural\\_report\\_2005.pdf](http://www.foa.co.uk/publications/agricultural_report_2005.pdf) pg 67

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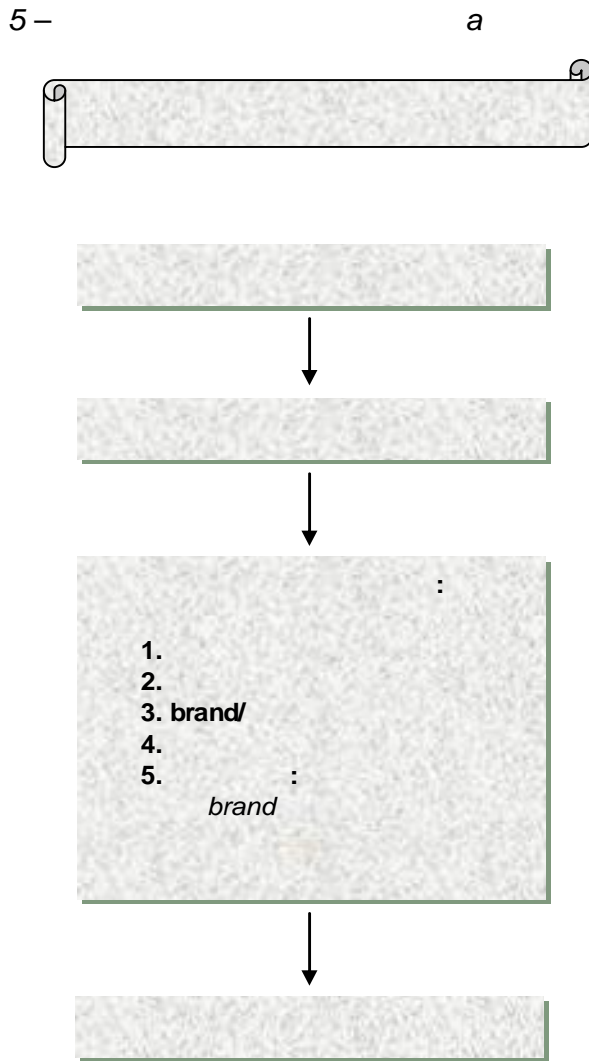
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<sup>19</sup> Wieenga, B., *Agricultural marketing and consumers behavior in changing world*, Springer, 1997, pg 144 - 148



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<sup>21</sup> FOCUS on FOOD Consumers in the Balkans, FOCUS-BALKANS, FP7 KBBE 2007 1, GA 212579, is supported by the European Commission, DG Research, 2011, pg. 2



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<sup>22</sup> Pache, Gilles, Private Label Development: The Large Food Retailer Faced with the Supplier s Opportunism, Service Industries Journal, Vol. 27 Issue 2, 2007, pg 176



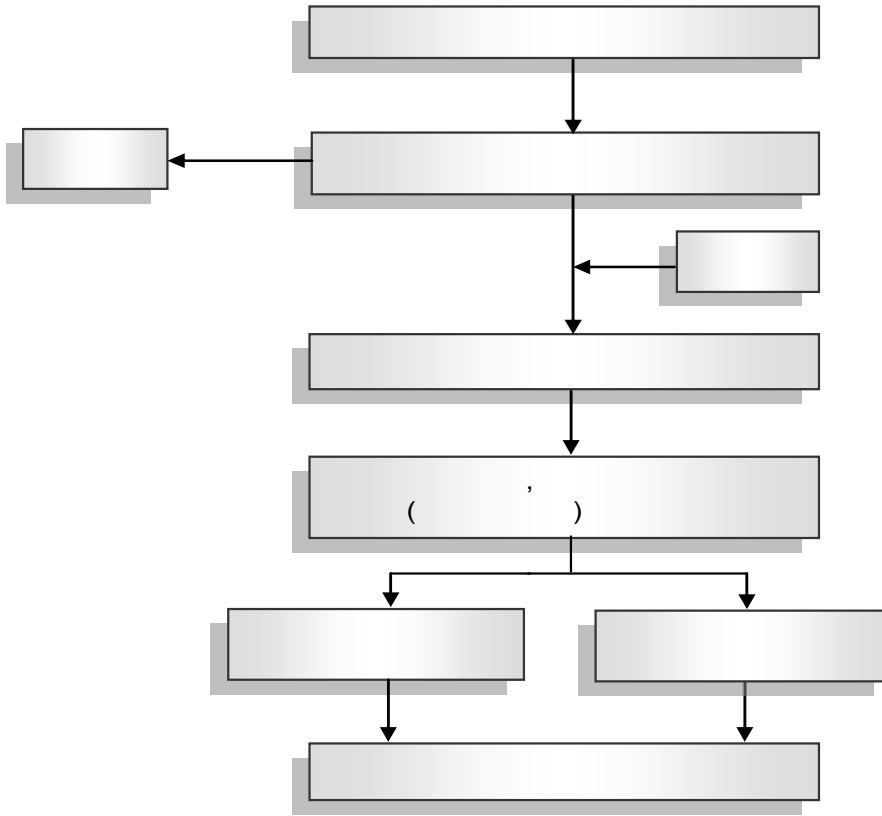








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<sup>31</sup> Jiqin, H., Omta, S.W.F., and Trienekens, J.H., (2007), "The Joint Impact of Supply Chain Integration and Quality Management on the Performance of Pork Processing Firms in China," *International Food and Agribusiness Management Review*, 10.2, pp.67-98

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<sup>32</sup> Walker, B., Bovet, D., and Martha, J., (2000), "Unlocking the Supply Chain to Build Competitive Advantage," *International Journal of Logistics Management*, 11.2, pp.1-8.

<sup>33</sup> Ittner, C.D., and Larcker, D.F., (1997), "The Performance Effects of Process Management Techniques," *Management Science*, 43.4, pp. 522-535.

<sup>34</sup> Chan, F.T.S., and Qi, H.J., (2003), "Feasibility of Performance Measurement System for Supply Chain: A Process-based Approach and Measures," *Integrated Manufacturing Systems*, 14.3, pp.179-190.

<sup>35</sup> Rajwinder Singh, H.S. Sandhu, B.A. Metri and Rajinder, Kaur, *Relating organised retail supply chain management practices, competitive advantage and organisational performance*, The Journal of Business Perspective, Vol. 14, No. 3, July-September 2010, pg 182





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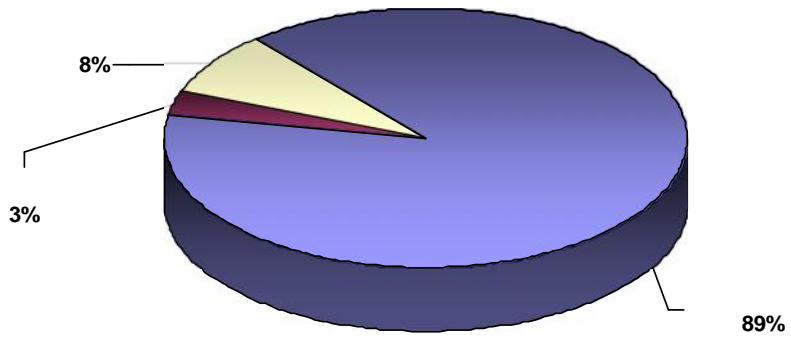
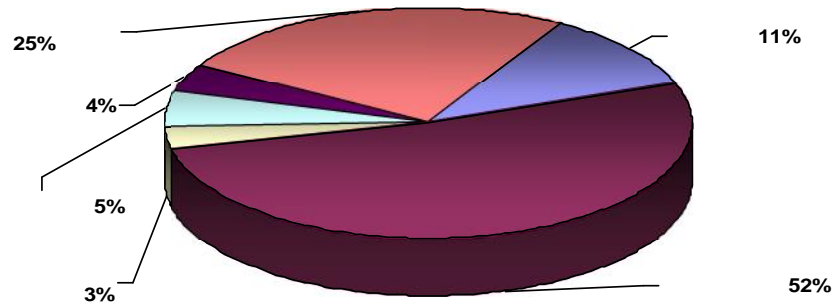
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<sup>36</sup> <http://www.visiterungis.com/vr.php?lg=an&p=101&ml=3>  
<sup>37</sup> <http://www.rungisinternational.com/exter/datas/Rungis-International/chiffre-cles.html>  
<sup>38</sup> <http://www.ambafrance-uk.org/Rungis-Market-exports-its-know-how.html>



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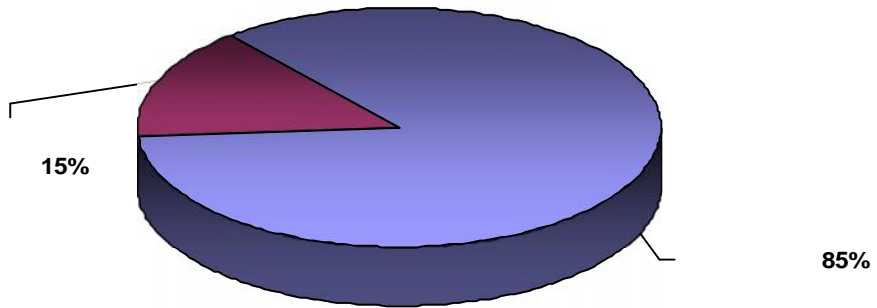
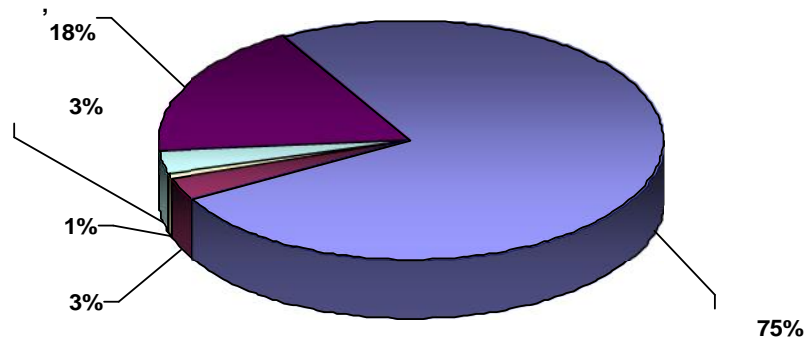
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	301.000	2.444	0,81%	7.327	2,43%	17.686	5,88%
	353.315	381	0,11%	2.618	0,74%	4.648	1,32%
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<sup>39</sup> Food Logistics, Independent, Large Chain Retailers See Sales Growth, 5/16/2006, Issue 86, p 8-8, 1/3p

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<sup>40</sup> Global Retail Trends 2010 (Jul 2010), Research on international markets, Hamburg, y.Stats.com GmbH&Co.KG, pg 6  
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4	Metro AG		92.905
5	The Kroger Co.		90.374
6	Costco Wholesale Corporation		88915
7	Schwarz Unternehmens Treuhand KG		87.841
8	Aldi Einkauf GmbH & Co. oHG		73.375*
9	Walgreen		72.184
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6	Schwarz Unternehmens Treuhand KG		87.236*
7	Metro AG		85.832
8	The Home Depot, Inc.		74.754
9	Aldi Einkauf GmbH & Co. oHG		73.035*
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<sup>41</sup> Process based strategic planning, Rudolf Grunig, Richard Kuhn, pg 92

<sup>42</sup> Fernie J. (1994) Quick Response: An International Perspective, International Journal of Physical Distribution Logistics Management, Vol. 24, No. 6, pg 38



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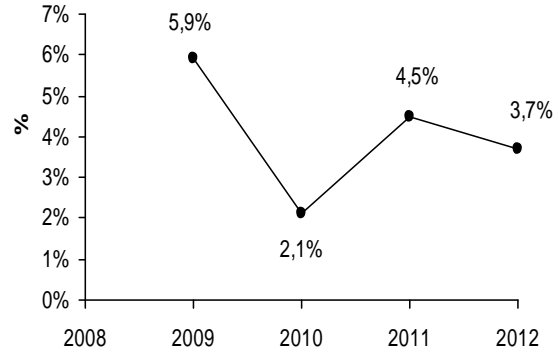
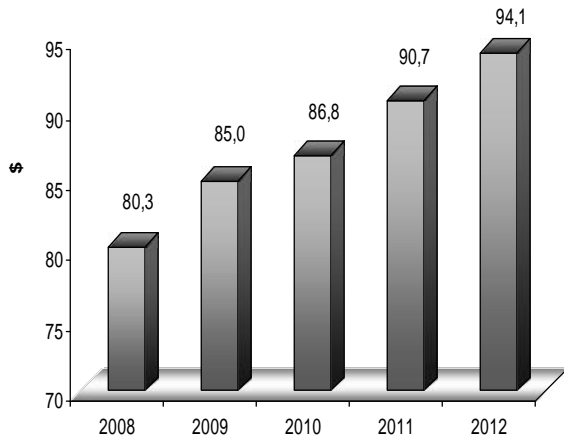
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: Food Retail in Australia, march, 2013, [www.marketline.com](http://www.marketline.com)

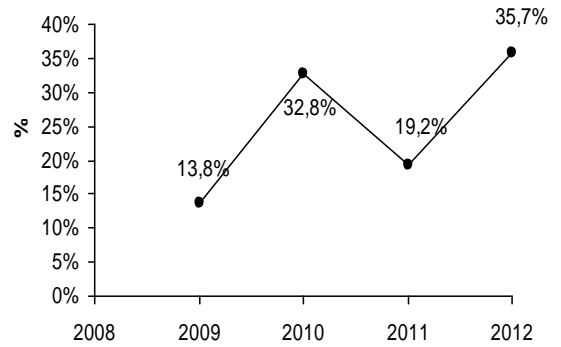
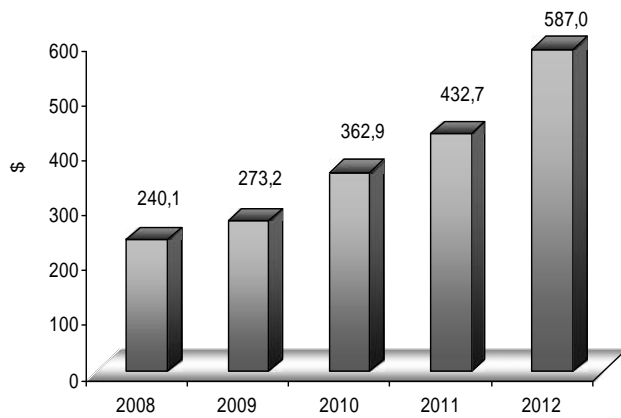
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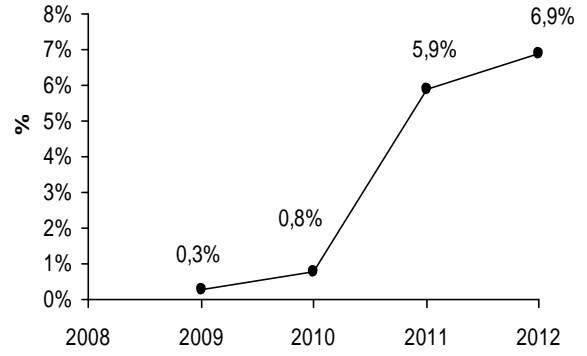
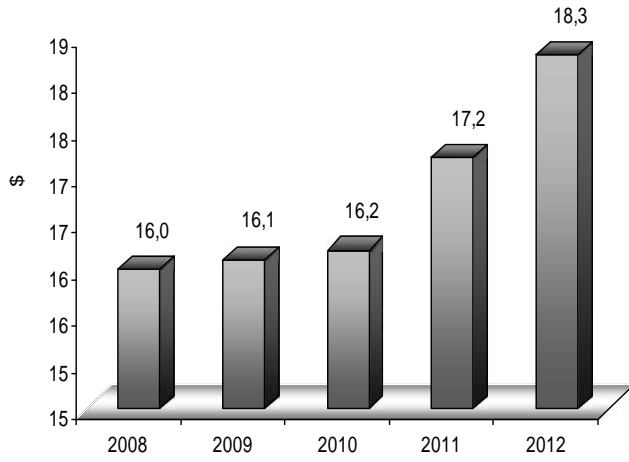


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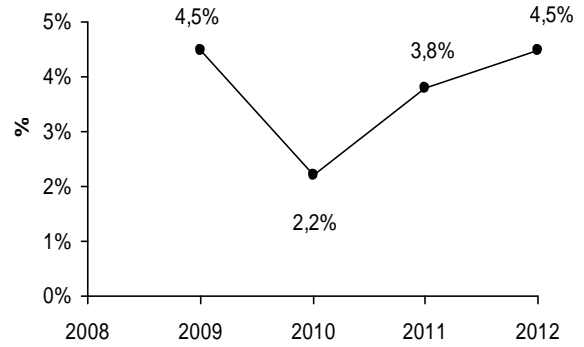
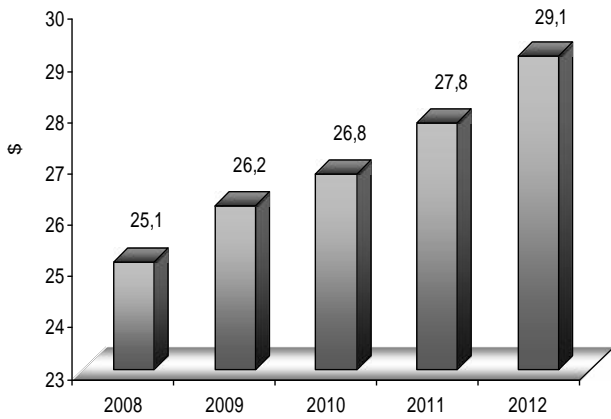


: Food Retail in Hungary, march, 2013, [www.marketline.com](http://www.marketline.com)

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: Food Retail in Norway, march, 2013, [www.marketline.com](http://www.marketline.com)

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<sup>44</sup> Ulf Elga and Heli Pavola, Market orientation of retail brands in the grocery chain: the role of supplier relationships, *The International Review of Retail, Distribution and Consumer Research*, Vol. 18, No. 2, May 2008, pg 228

<sup>45</sup> , 2005. , 517

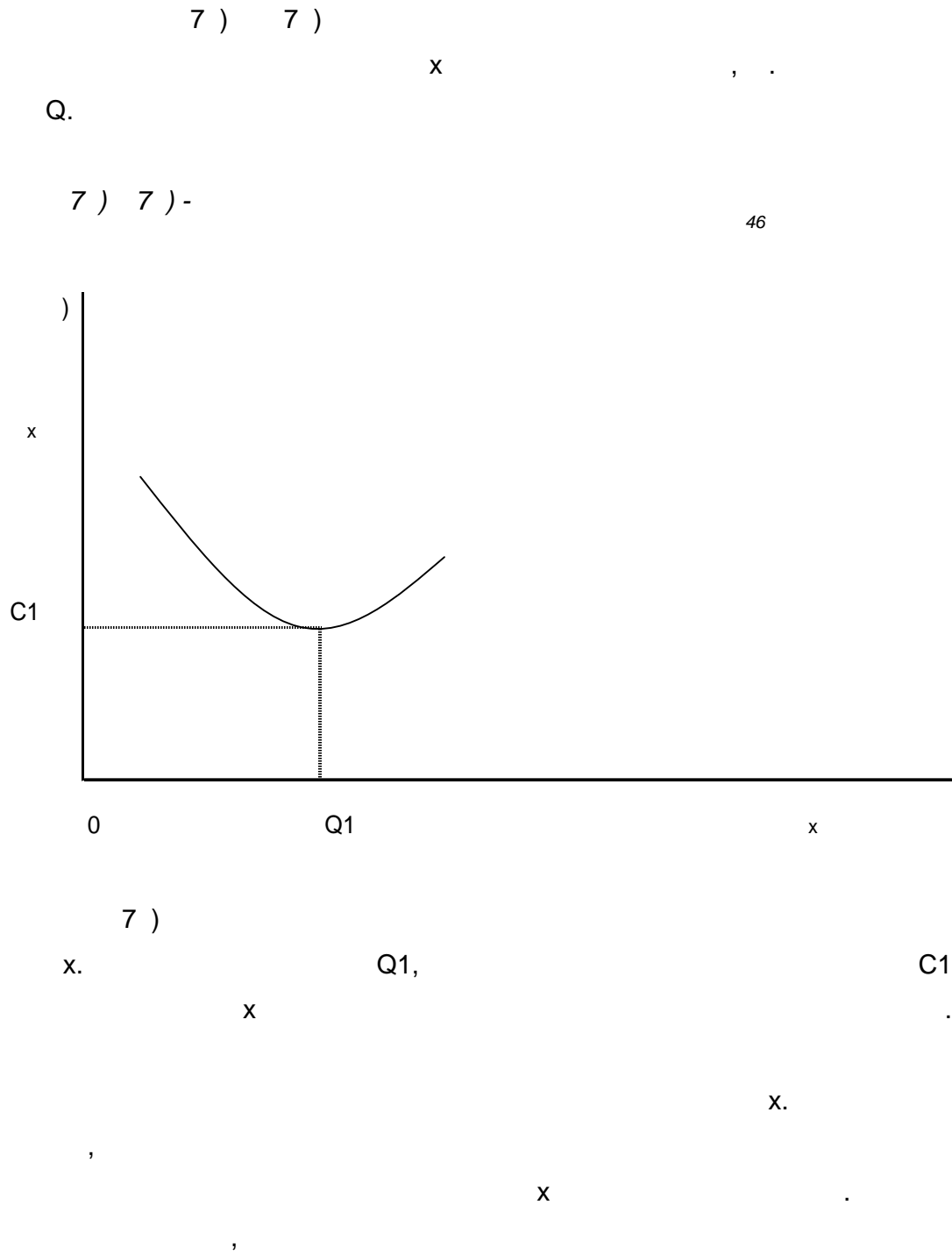




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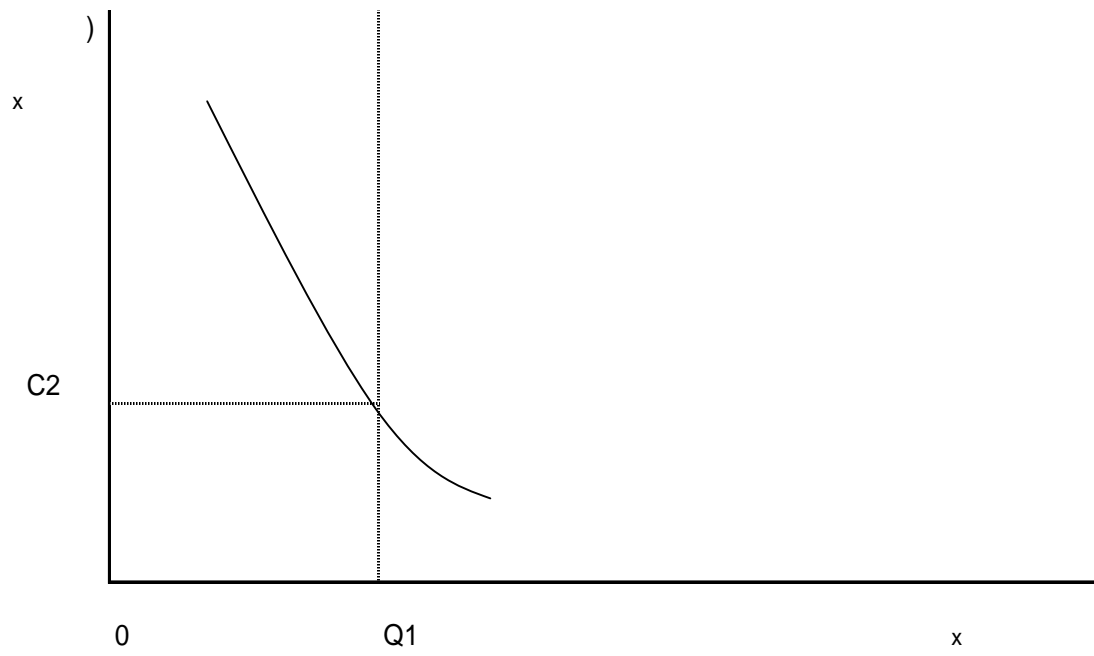
Rosenbloom



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<sup>46</sup> Rosenbloom B., The wholesaler's role in the marketing channel Disintermediation vs. Reintermediation, International Review of Retail, Distribution Consumer Research, Sep 2007, Vol. 17 Issue 4, pg 331





7 ) , Q1  
 x, C2.  
 x.

$$C_m = P_m D + F$$

C<sub>m</sub>=

P<sub>m</sub>=

F=

D=

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$$Cd = PdD$$

:  
Cd=  
Pd=  
D=

$$R = PmD + F/PdD$$

$$R = 1$$

De

$$De = F/Pd - Pm$$

per capita

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<sup>47</sup> . 27-29 , 2009,

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2.3.

48

49

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48

, 2005, . 173

<sup>49</sup> Terry L., Esper & Alexander E., Ellinger & Theodore P., Stank & Daniel J., Flint & Mark Moon, Demand and supply integration: a conceptual framework of value creation through knowledge management, Academy of Marketing Science 2009, pg 16

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(2001)<sup>50</sup>

Frajzer

51

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<sup>50</sup> Mentzer, J.T., Flint, D.J., and Hult, G.T.M., (2001), "Logistics Service Quality as a Segment-customised Process," *Journal of Marketing*, 65.4, pp.82-104.

<sup>51</sup> Frajzer, Organizing and managing channels of distribution, *Journal of the Academy of Marketing Science*, 1999, pg 226–240

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56

85%, 83,5%, 82,8%, 95,4%, 89,5%,  
78,8%, 77%

<sup>55</sup> Kumar N., *The Revolution in Retailing: from Market Driven to Market Driving, long Range Planning*, Pergamon, broj 6/1997., str. 831 i Lovreta S., *Trgovinski menadžment*, Ekonomski fakultet i Igoja štampa, Beograd, 1998.

<sup>56</sup> , 2005, . 518

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66,4%, 73,2%, 70,9%, 68,4%, , 38,9%,  
 31,4%. 55,7%, 53,9%, 43,7%,  
 3/4

57

10

12%

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58

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57

, 2013, . 363

58

, 2005, . 515

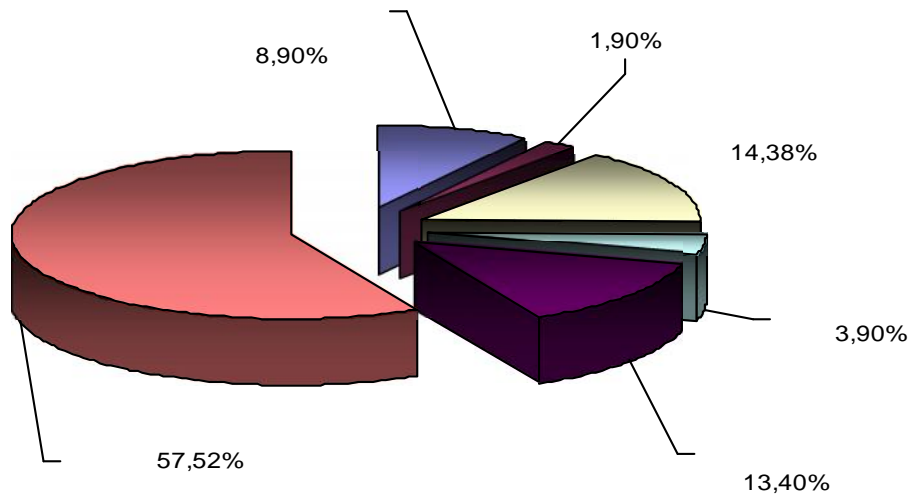


Design).

" (Customer-Driven Distribution System

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2012.



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Tesco, Carrefour, Wall-Mart

**3.2.**



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	2009	2010	2011	2012
( . )	306.668	340.516	369.365	373.373

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61

(health food),

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(organica food)

(natural food).

XX

( 1957).<sup>62</sup>

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62

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:	418.113
(000 ):	- 39.505 / - 24.888 / - 16.945
:	23.214.000 (2008.), 22.388.000 (2009.)
:	11.406.000 (2008.), 11.018.000 (2009.)
:	4,6%
:	26,37%
:	2,80%
:	18
:	40% 67%,

: European Commission, Agriculture and Rural Development, Rural Development Policy 2007-2013, [http://ec.europa.eu/agriculture/rurdev/index\\_en.htm](http://ec.europa.eu/agriculture/rurdev/index_en.htm)

1975.

(ERDF).



105 2013. 2012.  
 ( 3,3%).

8-

	\$ 2011.
	42.826
	24.262
	19.780
	13.842
	11.613
	10,107
	9.824
	9.446
	9.013
	6.621

[:http://www.mapsofworld.com/world-top-ten/world-top-ten-agricultural-exporters-map.html](http://www.mapsofworld.com/world-top-ten/world-top-ten-agricultural-exporters-map.html)

20%

64

70%

65

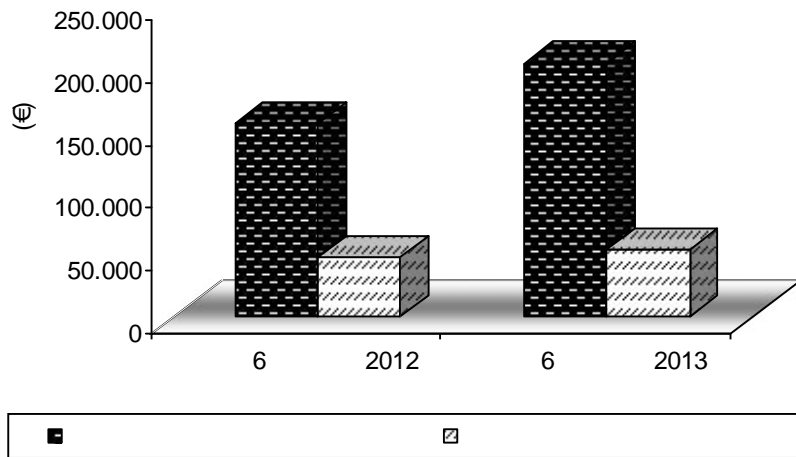
2013. 6 2013. ,  
 16%  
 2013. 30 € 35,8 €  
 2012.

<sup>64</sup> <http://www.frenchfoodintheus.org/spip.php?rubrique266>

<sup>65</sup> <http://www.state.gov>

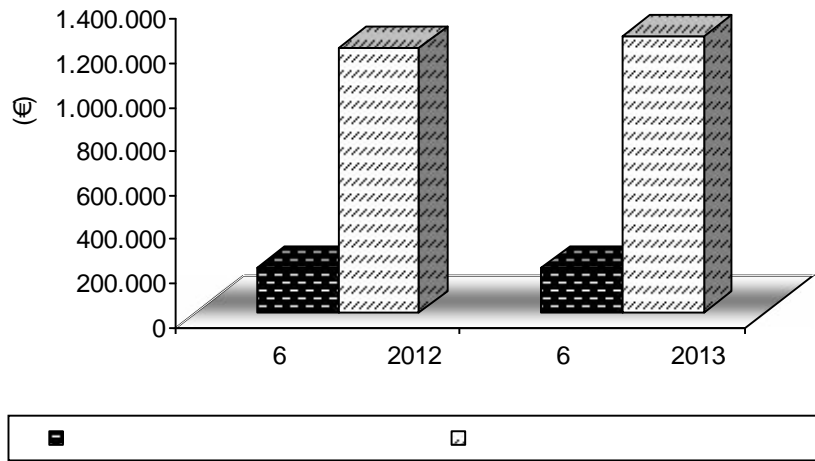
2013. .  
 48% 2012.  
 ; , 36%,  
 916,7 € 2013. (875,4  
 € 2012. ).

9 -



: <http://www.frenchfoodintheus.org/spip.php?article4833>

10 -



: <http://ekport.gov/france/>

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67

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2009.

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<sup>67</sup> <http://greenmash.com/solutions/agriculture>

<sup>68</sup> [http://ec.europa.eu/agriculture/organic/consumer-trust/certification-and-confidence/short-supply-chain/index\\_en.htm](http://ec.europa.eu/agriculture/organic/consumer-trust/certification-and-confidence/short-supply-chain/index_en.htm)









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GATT,

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- 1) ;
- 2) ( ) ;
- 3) .

, (« 2000»),

520

CAP-

CARPE (COMMON AGRICULTURAL

AND RURAL POLICY OF EUROPE)<sup>72</sup>

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<sup>72</sup> Program to Create, Provide Technical Assistance to and Establish Networks for the Development of Business Professionals, Uruguay

:

- (1) (Market stabilisation – MS),
- (2) (Environmental and cultural landscape payments – ECLP),
- (3) (Rural development incentives – RDI),
- (4) (Transitional adjustment assistance – TAA).

73

74

1962.

20%, 57%

50%,

20% 50%, 64%

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<sup>73</sup>  
<sup>74</sup>

|

(Tariff Equivalent)

ad valorem

50% 75%, 75%  
70%. 54%  
100%.

5 .<sup>75</sup>

9 -

		( )	
	-36%	-15%	6
	-24%	-10%	10

: WTO. [http://www.wto.org/english/tratop\\_e/agric\\_e/negs\\_bkgrnd05\\_intro\\_e.htm](http://www.wto.org/english/tratop_e/agric_e/negs_bkgrnd05_intro_e.htm), 28.06.2013.

36%. : 130%  
46,7%, 80% 130%  
42,7%, 30% 33,3%.  
10 .<sup>76</sup>

<sup>75</sup> WTO. 2008. Unofficial Guide to the Revised Draft Modalities – Agriculture, pg 10

<sup>76</sup> Ibidem, pg 10



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#### IV.

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“ , 2009, . 17 ”,









	( . \$)					
	2011	2005	2011	2005-2011	2010	2011
	1.659.524	100	100	12	16	21
	1.754.208	100	100	12	14	26
(27)	625.886	44	38	9	8	17
(27)	157.978	10	10	11	17	22
	168.208	10	10	13	19	18
	86.458	4	5	16	19	26
	64.613	3	4	14	26	25
	60.144	5	4	7	19	15
	48.143	2	3	23	42	34
	47.601	2	3	18	25	35
(27)	654.003	45	37	8	6	17
(27)	186.095	13	11	9	9	21
	144.724	5	8	21	41	34
	137.160	11	8	6	16	18
	95.810	7	5	6	14	24
	40.812	2	2	16	20	17
	36.447	2	2	9	12	14
	34.681	2	2	13	26	30

: World Commodity Profiles for 2011, International Trade Statistics 2012, Switzerland, Geneva, Published by the World Trade Organization, <http://www.wto.org>

a

2011.

1,66

9,1%

81







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**2.**

8,5%,<sup>85</sup> 22,8%.<sup>86</sup>  
 2,37 3,6  
 778.891 10 5,5%

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<sup>84</sup> Ceranic, S., Maletic, R., *Small and medium enterprises as development factor of agribusiness in Republic of Serbia*, Applied studies in agribusiness and commerce- APSTRACT Agroinform publishing house Budapest, 2009.  
[http://ageconsearch.urnn.edu/bitstream/91130/2/7\\_Maletic%20Small\\_Apstract.pdf](http://ageconsearch.urnn.edu/bitstream/91130/2/7_Maletic%20Small_Apstract.pdf)

<sup>85</sup> 2012.  
<sup>86</sup> 2012.

11 –

			%		+
<b>2005</b>	416,592,000,000	17,351,357,000	4,17	2,713,600,000	20,064,957,000
<b>2006</b>	487,900,000,000	19,623,486,000	4,02	3,433,770,000	23,057,256,000
<b>2007</b>	595,517,786,100	21,410,029,000	3,60	4,685,722,714	26,095,751,714
<b>2008</b>	654,429,163,862	22,329,818,000	3,41	4,834,160,000	27,163,978,000
<b>2009</b>	719,854,143,000	15,964,071,000	2,22	10,726,385,000	26,690,456,000
<b>2010</b>	797,498,137,000	19,907,945,000	2,50	5,713,865,000	25,621,810,000
<b>2011</b>	898,981,736,000	22,033,208,000	2,45	10,560,020,000	32,593,228,000
<b>2012</b>	940,157,524,000	22,858,434,000	2,43	26,627,056,000	49,485,490,000
<b>2013</b>	1,078,136,060,000	47,604,882,000	4,42	830,000,000	48,434,882,000

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2009. 2005. 2005.  
 , 2009. 2,22% 4,17%

2,4-2,5% 2013. ,

4,42%.







12 - ( )  
2005-2012.

( . )								
	2005	2006	2007	2008	2009	2010	2011	2012
	4.553,4	6.427,9	8.824,8	10.972,8	8.344,9	9.794,5	11.779,5	11.353,6
	924,4	1.265,5	1.690,3	1.957,5	1.945,3	2.240,8	2.696,6	2.716,7
	20,30%	19,69%	19,15%	17,84%	23,31%	22,88%	22,89%	23,93%
	779,3	1.065,3	1.359,4	1.483,9	1.509,8	1.768,1	2.091,5	2.108,4
	2,4	2,3	17,0	58,2	56,6	66,5	74,1	59,6
	33,0	76,7	95,6	88,3	64,5	59,5	58,8	63,6
	11,8	42,3	54,7	70,4	64,3	68,9	90,7	94,1
	2,2	2,9	3,2	6,9	5,4	4,3	4,4	4,1
	184,1	291,8	342,5	361,3	477,3	578,6	731,8	838,4
	262,5	326,0	466,5	479,3	453,1	528,9	657,6	539,3
	175,8	168,0	166,3	175,8	158,6	215,8	187,3	195,3
	45,6	58,0	73,4	85,1	83,7	84,1	84,9	77,9
	18,5	27,0	60,3	70,7	61,6	74,0	102,1	132,5
	43,4	69,5	75,4	87,8	84,4	87,3	99,6	103,6
	54,9	113,5	175,7	250,1	248,2	231,8	273,8	286,2
	51,2	99,9	146,6	204,9	192,8	176,5	215,0	213,1
	3,7	13,6	29,0	45,1	55,4	55,3	58,8	73,1
	11,8	13,8	14,1	23,7	23,2	42,0	61,1	57,8
	16,4	21,2	21,8	21,4	13,7	28,0	36,6	38,6
	19,5	20,8	21,8	29,8	26,0	26,6	32,7	29,9
	42,5	30,9	97,5	148,6	124,4	144,3	200,9	195,8

2005. 2012. ( )

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(1.957,5

(1.945,3 . )

2012.



( 2012.

2.716,7 .

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2005-2012.

	2005	2006	2007	2008	2009	2010	2011	2012
	10.575,7	13.172,3	18.350,4	22.999,2	15.581,9	16.734,4	19.861,9	19.013,3
	772,7	905,5	1.115,9	1.467,9	1.308,4	1.036,3	1.404,7	1.470,2
	7,31%	6,87%	6,08%	6,38%	8,40%	6,19%	7,07%	7,73%
	591,1	649,5	836,3	1.106,9	951,0	774,2	1.055,2	1.076,4
	8,3	5,8	10,3	15,4	23,3	6,3	16,3	27,8
	15,2	17,0	25,4	48,6	52,2	42,4	57,1	77,4
	12,4	11,6	23,5	39,6	27,0	43,5	57,8	57,9
	53,4	61,4	84,6	100,0	101,1	64,2	96,7	92,4
	42,9	53,4	68,1	91,7	72,7	51,5	84,2	85,4
	159,4	189,8	258,1	332,0	280,9	246,2	302,4	290,1
	40,8	37,5	44,5	50,7	37,8	27,1	39,9	47,3
	120,5	131,2	173,2	226,3	180,3	167,9	214,1	210,5
	49,0	57,7	50,9	73,1	53,8	37,6	53,1	59,8
	89,1	84,0	97,5	129,2	121,9	87,4	133,6	127,7
	115,3	160,4	158,4	180,1	190,8	116,5	197,9	191,3
	29,9	60,9	76,9	91,4	81,2	53,1	81,4	80,6
	85,4	99,5	81,5	88,7	109,6	63,4	116,4	110,7
	13,9	21,9	28,8	52,9	62,3	51,7	40,4	76,3
	1,9	1,3	2,8	7,3	7,8	15,5	22,9	35,2
	30,1	32,9	47,0	59,9	46,9	39,4	43,3	42,3
	20,4	39,5	42,6	60,8	49,6	39,0	45,0	48,7

2005. 2012.

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772,7

2005.

2008.

1.467,9

2010.

1.036,3

216,2%. , 2012.

1.470,2 . .

14 -

2005-2012. ( )

	2006/2005	2007/2006	2008/2007	2009/2008	2010/2009	2011/2010	2012/2011
	136,90	133,57	115,81	99,38	115,19	120,34	100,75
	117,19	123,24	131,54	89,13	79,20	135,55	104,66

: 2005. 2012. , - ( )

2005. 36,9%, 17,19% . 2006.  
2008.  
( 2007. 0,62%,  
10,87%).

15 -

2005-2012.

2005	2006	2007	2008	2009	2010	2011	2012
119,6%	139,8%	151,5%	133,3%	148,7%	216,2%	191,9%	184,8%

: 2005. 2012. , - ( )

2008. ( 119,6% 2005. 133,3%  
2008. ), 216,2% 2010. . 2011.  
191,9%, 2012. 184,8%.

2011.

1.291,9 ( ,

, 2010. ),

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489,6 . 2008. , 2010.

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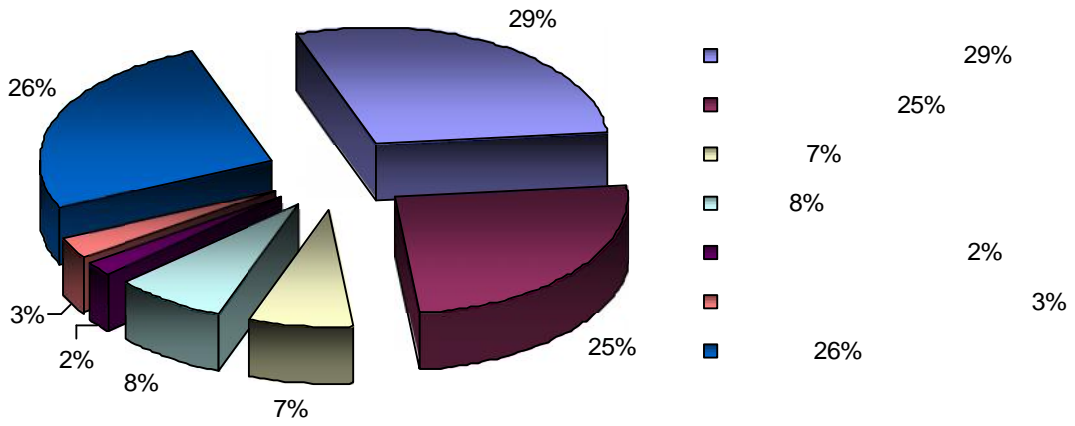
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- 2011. ,

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2011.



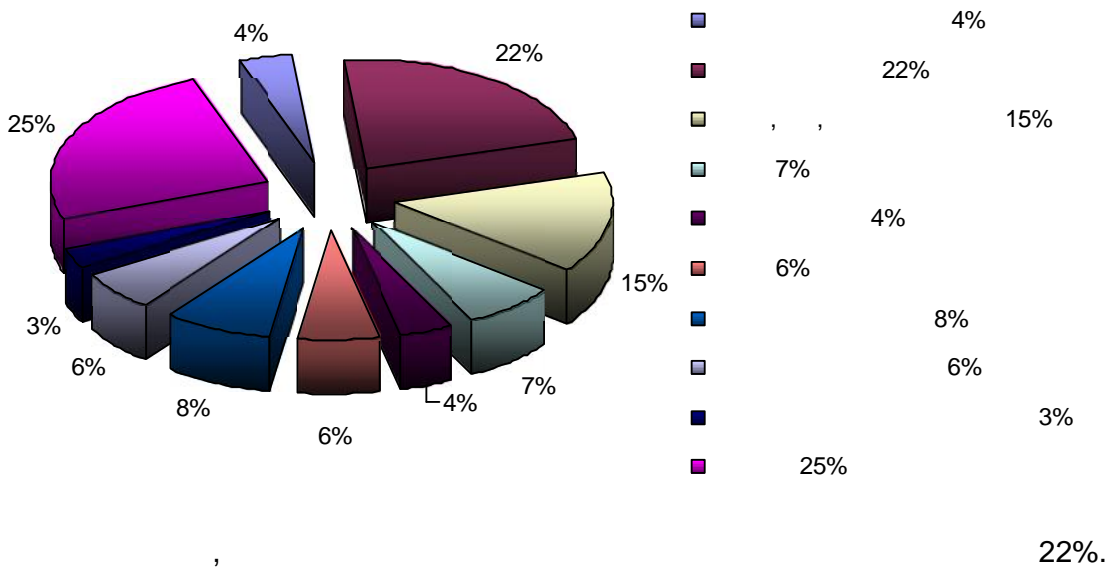
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29%.

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2011.



2005. 2011.

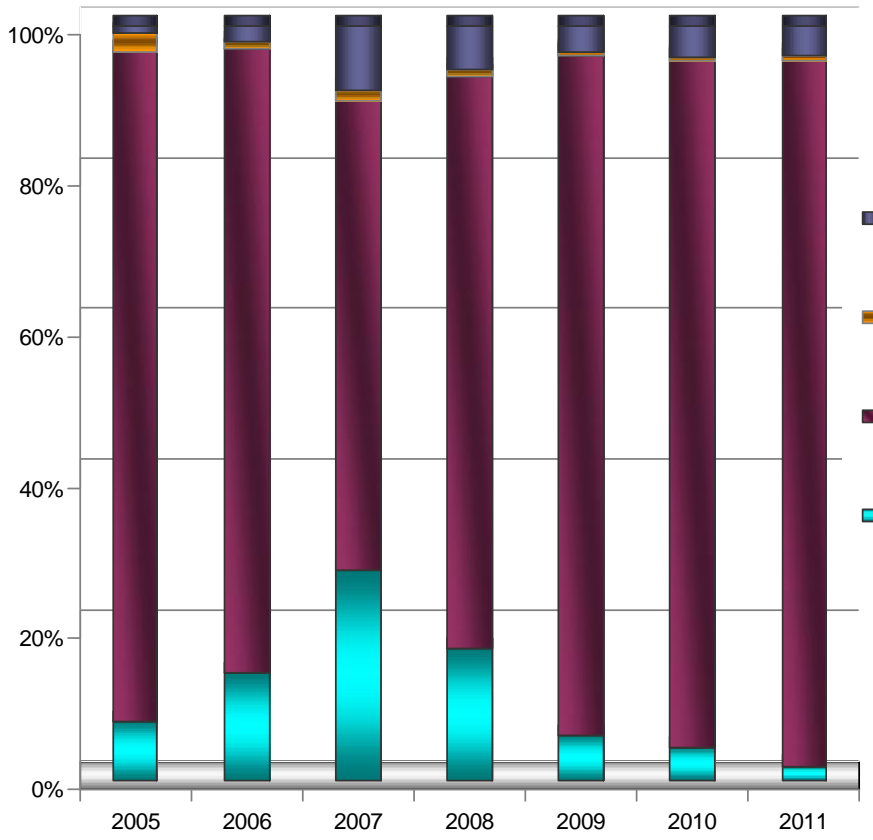
16 –

2005-2011. ( . )

	2005	2006	2007	2008	2009	2010	2011
	924,4	1.265,5	1.690,3	1.957,5	1.945,3	2.240,8	2.696,6
	33,0	76,7	95,6	88,3	64,5	59,5	58,8
	9,0	31,0	38,0	30,0	19,0	16,0	9,0
	184,1	291,8	342,5	361,3	477,3	578,6	731,8
	103,0	180,0	85,0	130,0	288,0	335,0	455,0
	262,5	326,0	466,5	479,3	453,1	528,9	657,6
	2,8	2,0	2,0	1,7	1,8	2,0	3,0
	1,0	4,4	11,5	9,6	10,4	14,6	18,6

: UN Comtrade, <http://comtrade.un.org/>

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2005. 2011. , ( )

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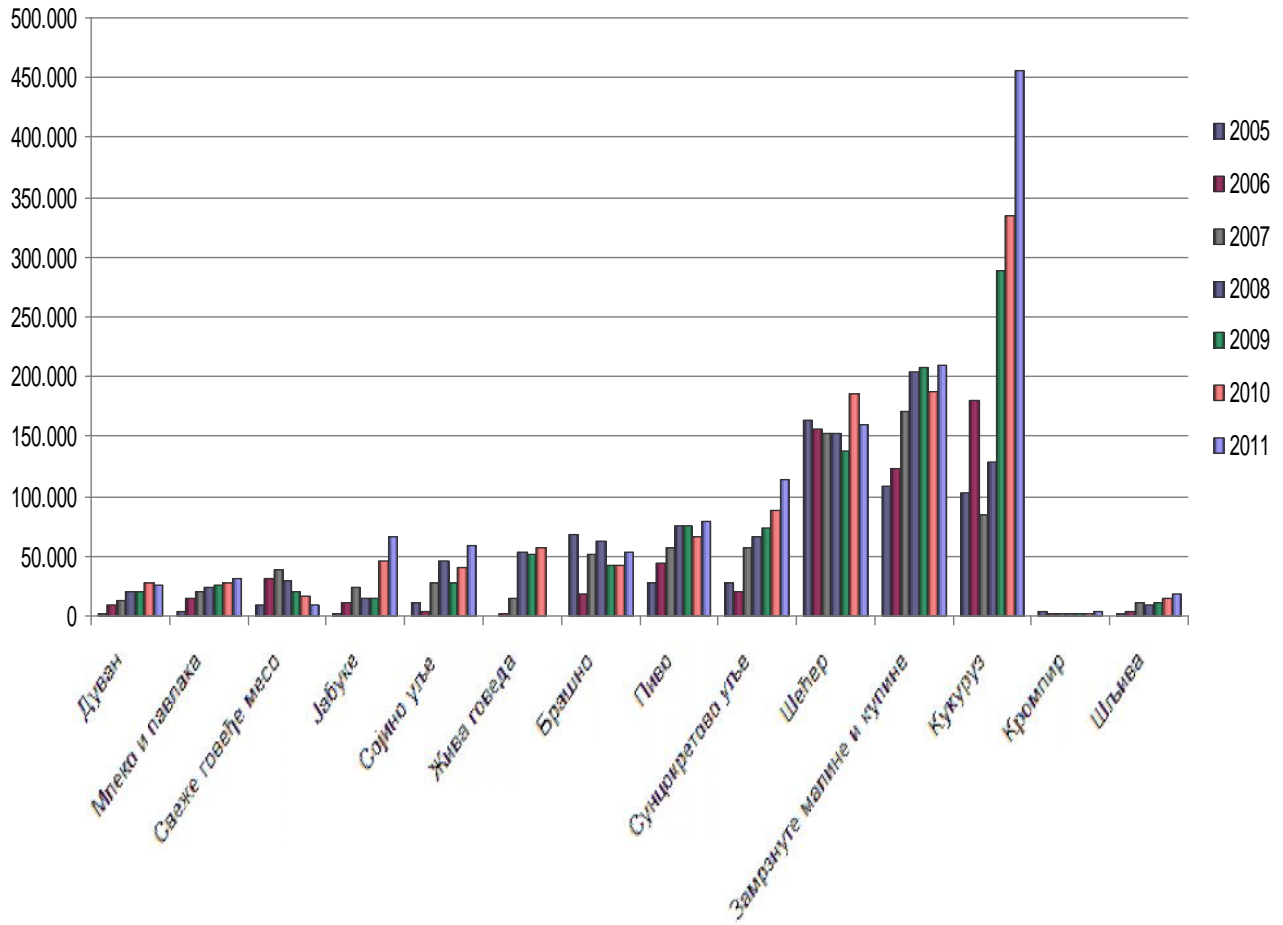
88

	2005	2006	2007	2008	2009	2010	2011
	2.568.304	8.338.392	13.419.039	19.404.624	20.752.612	26.887.598	25.579.267
	3.914.881	15.447.493	19.685.790	24.703.431	25.143.174	26.786.293	31.518.107
	9.407.914	31.040.411	38.511.359	30.324.068	19.349.834	16.345.853	9.151.293
	2.670.589	11.691.024	23.809.812	14.610.876	14.964.320	46.418.915	65.799.199
	10.163.996	4.589.785	27.537.393	46.032.084	28.232.330	39.595.606	58.532.311
		1.003.046	15.304.120	54.209.413	52.018.513	57.623.292	
	6.848.586	18.709.891	50.761.538	62.374.022	42.211.901	41.463.742	52.406.588
	28.378.006	44.975.947	57.025.910	76.238.551	75.043.067	65.931.802	79.561.705
	27.540.213	20.539.324	57.004.759	65.438.896	72.715.111	88.151.654	114.117.100
	163.530.720	155.785.270	152.268.873	153.044.092	137.443.327	185.498.354	160.202.214
	108.976.043	123.957.448	170.480.856	204.230.267	206.830.792	187.833.981	209.994.625
	103.266.572	179.712.208	85.098.785	129.577.470	288.128.985	334.923.074	455.543.765
	2.800.186	2.080.296	2.200.715	1.777.380	1.855.005	2.012.614	3.230.131
	1.025.735	4.437.621	11.588.349	9.652.850	10.475.682	14.629.110	18.663.459

: UN Comtrade, <http://comtrade.un.org/>

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2005.-2011. ( . )



: UN Comtrade, <http://comtrade.un.org/>

UN Comtrade

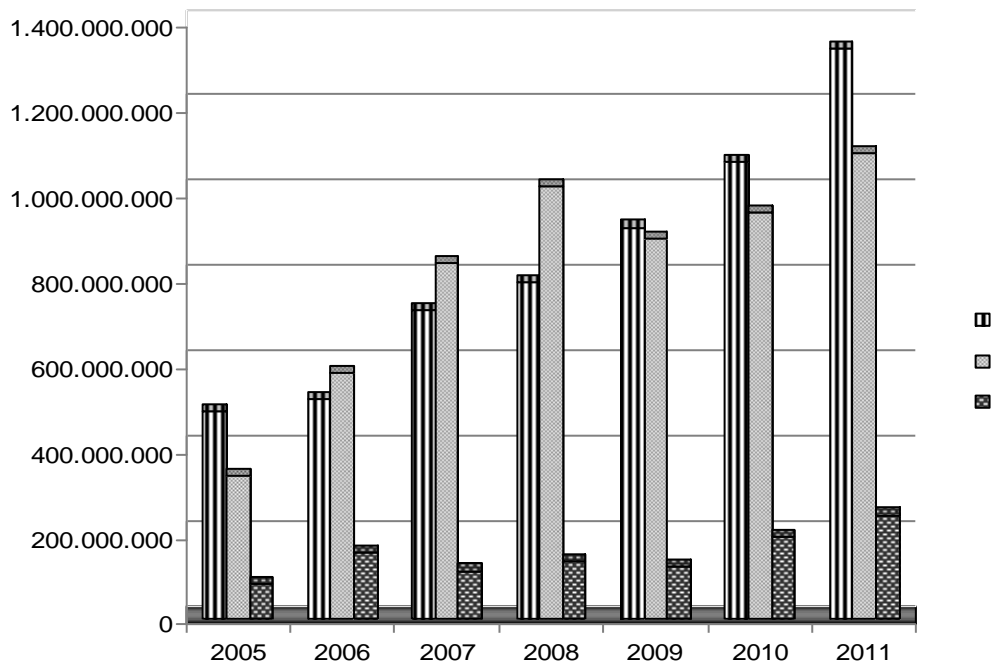
2005 2011.



<b>2005</b>	488.187.527	336.236.989	84.484.983	908.909.499
<b>2006</b>	516.830.208	577.061.187	156.787.773	1.250.679.168
<b>2007</b>	723.770.524	834.791.480	113.392.987	1.671.954.991
<b>2008</b>	789.605.109	1.015.813.676	137.730.039	1.943.148.824
<b>2009</b>	918.567.825	893.427.918	124.959.666	1.936.955.409
<b>2010</b>	1.071.877.602	954.417.077	193.912.026	2.220.206.705
<b>2011</b>	1.336.631.433	1.091.810.716	244.400.471	2.672.842.620

: UN Comtrade, <http://comtrade.un.org/>

).



: UN Comtrade, <http://comtrade.un.org/>



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2.1.

( , ) . 9%

11,31%

89



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(41%),

(15%),

90

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90

, 2005, . 265-285

19 -

( )

	2002	2003	2004	2005	2006	2007
	812.257	841.460	873.417	891.183	889.743	893.433
	554	528	581	520	53	547
	1.665	1.772	1.868	1.817	1.784	1.801
	3.720	3.772	4.254	4.117	4.049	4.157
	14.142	15.138	16.351	15.794	14.713	13.587
	8.937	8.667	8.731	8.420	5.711	5.819
	3.702	3.648	3.907	3.648	3.162	2.605
	3.990	4.108	4.254	3.953	3.834	3.595
	337	296	333	30	305	30
	1.851	2.001	2.103	1.637	1.779	1.754
	988	1.339	977	54	791	610
	3.901	4.501	4.902	3.963	4.141	3.813
	322	343	343	341	333	33
	72	7	83	89	8	66
	13.032	14.777	14.809	16.126	16.629	16.516
	25.825	25.918	25.349	26.288	25.736	24.454
	2.740	2.744	2.726	2.793	2.842	2.873
	389.240	400.625	410.323	423.262	437.326	448.983
	669	675	678	686	687	723
	734	715	784	765	803	759
	0	0	0	0	120	115
	482	367	279	268	269	300
	532	525	521	530	543	530
	2.223	1.850	2.322	2.202	2.265	1.858

:

350

,

130

135 , 2009.

,

20 - , , 2009.

<b>36,2</b>	<b>18,8</b>	<b>15,1</b>	<b>13,9</b>	<b>5,6</b>	<b>9,8</b>	<b>13,0</b>	<b>22,7</b>	<b>135,1</b>

:

21 - ( )

2003	679.309	301.850	163.606
2004	975.090	304085	184.688
2005	969.562	272.760	169.076
2006	930.305	324.657	189.222
2007	743.282	280.191	152.005
2008	843.545	300.519	176.501
2009	898.282	326.162	189.353
2010	887.363	336.600	189.412
2011	891.513	315.490	198.677
2012	577.966	281.557	155.663
	<b>8.396.217</b>	<b>3.043.871</b>	<b>1.768.203</b>

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, ( 20),

( 21), ,

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1 - 5

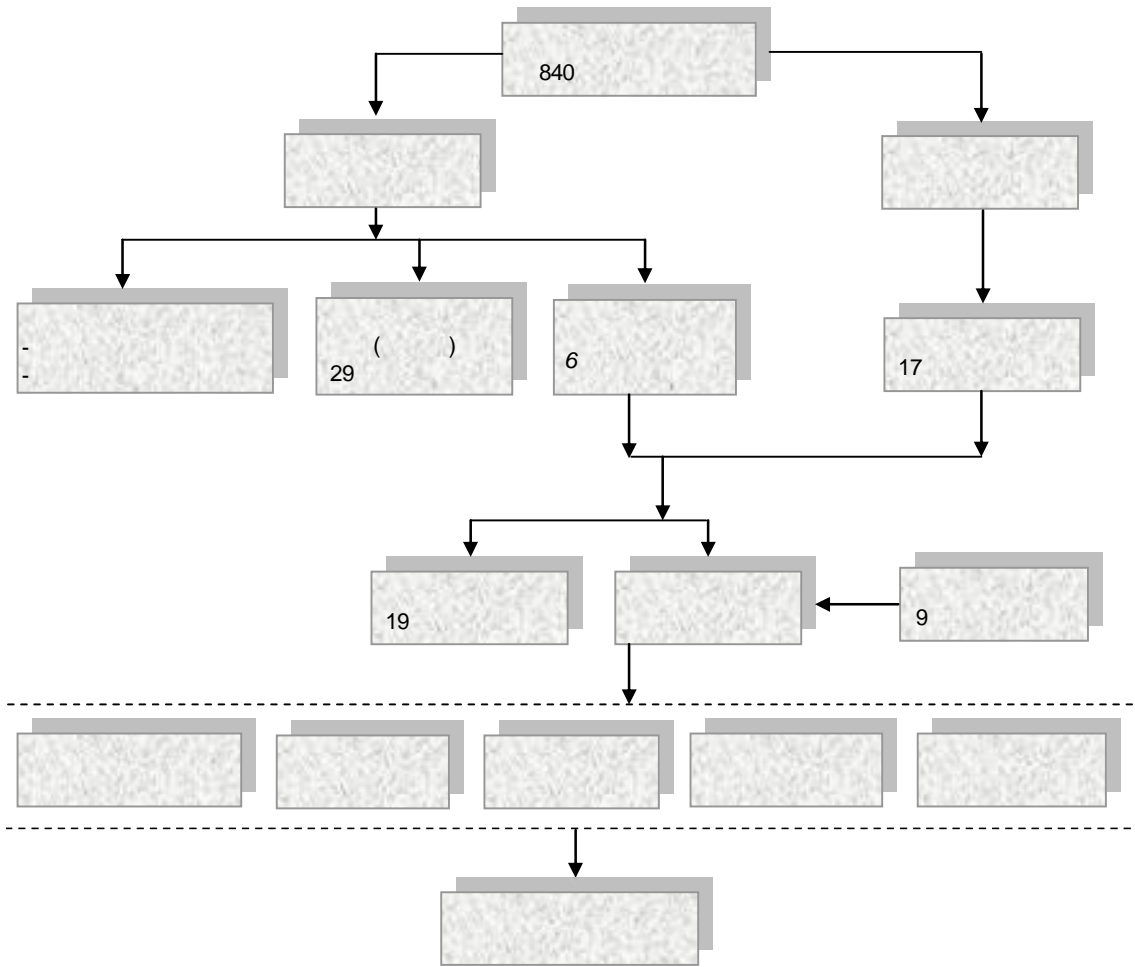
(  
)  
100 +  
1-5 5-20  
)  
20<sup>91</sup>

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<sup>91</sup> Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

7 -

(2003-2012. )



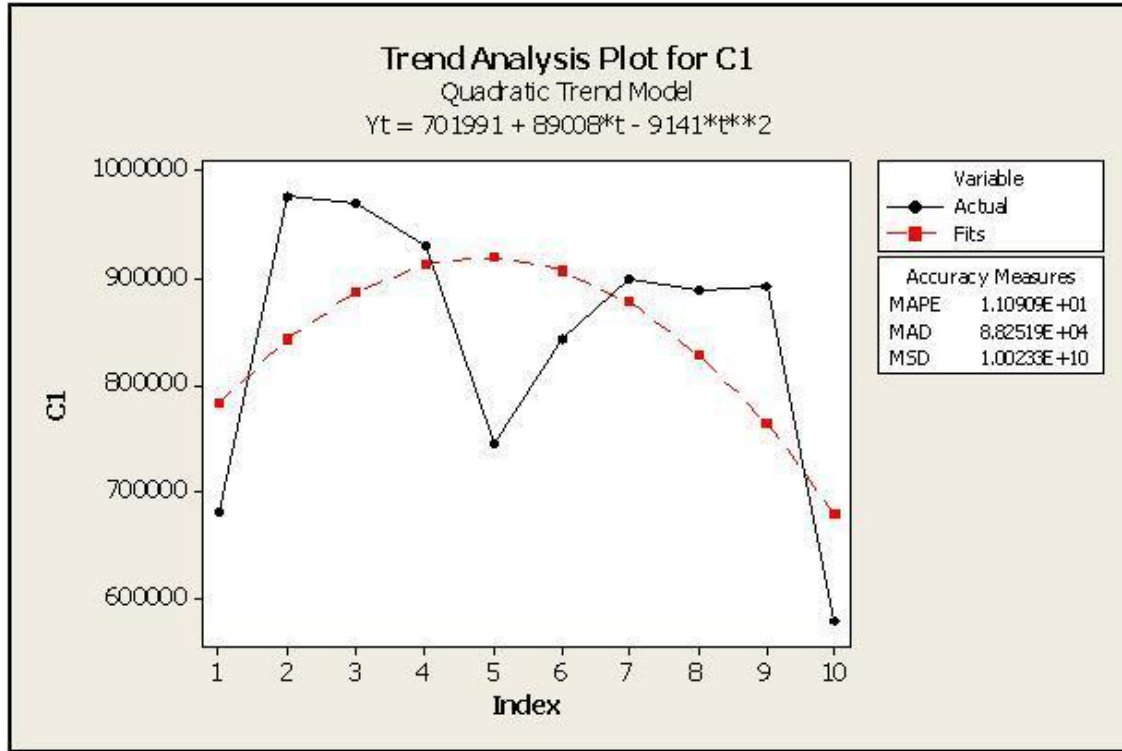
(2003-2012), [www.stat.gov.rs](http://www.stat.gov.rs)

840  
4,52%

15,65%.

22,

17 -



: Mini Tab

22 -

	14.434.850.883,74
	14.536.499.419,36
	10.023.309.211,74

: (2003-2012), [www.stat.gov.rs](http://www.stat.gov.rs)

4,65%,

1,32%.

96%.

23 –

(2003-2012)

		%
<b>-000</b>	<b>840</b>	<b>-4,52</b>
	809	-4.65
	31	-1.32
<b>-000</b>	<b>23</b>	<b>0,3</b>
	6	-7.95
	17	2.75
000	29	-4.48

www.stat.gov.rs (2003-2012),

23

( 35,59%).

2,75%

44,58%.

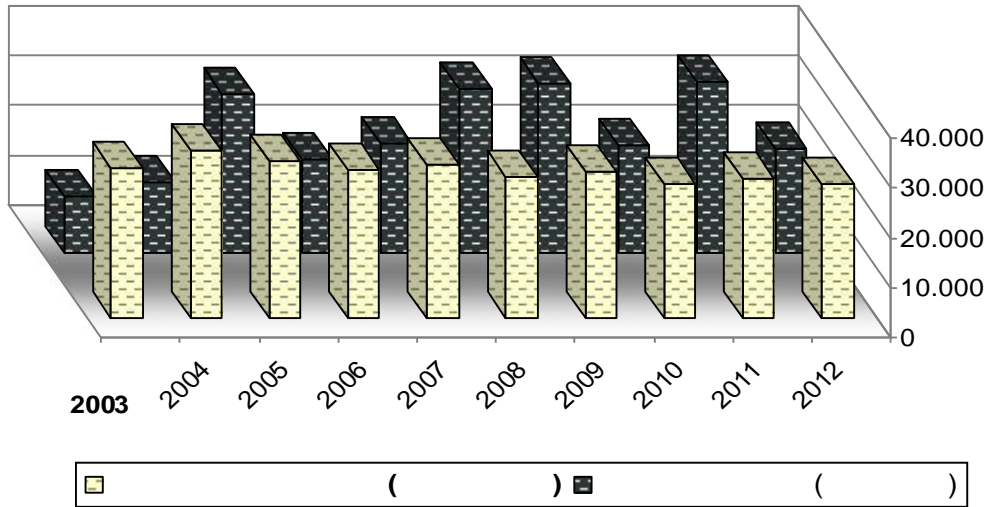
7,95%

47,59%.

(74%).

18.

18 –



[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

56%.

24 –

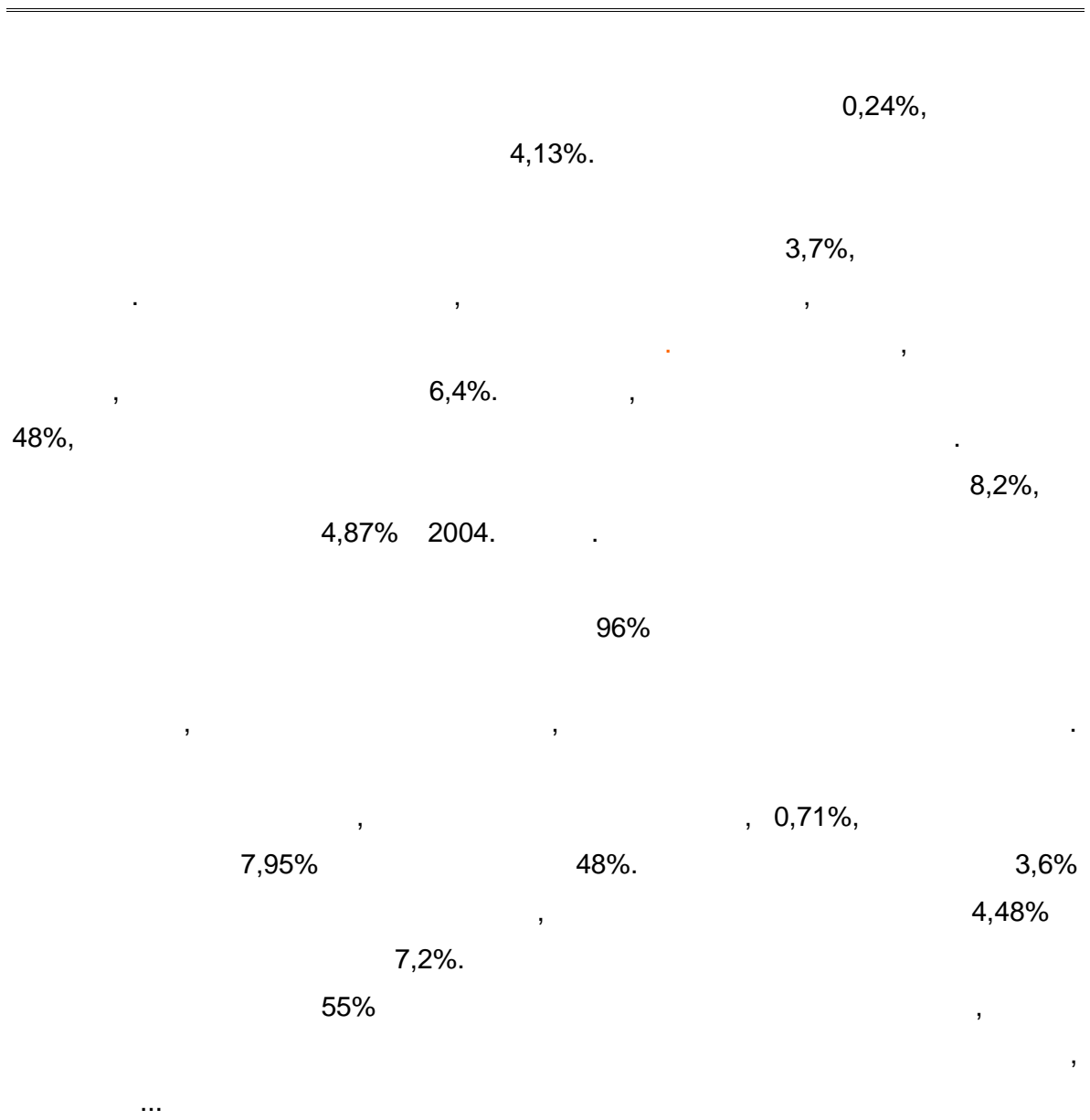
(2003-2012)

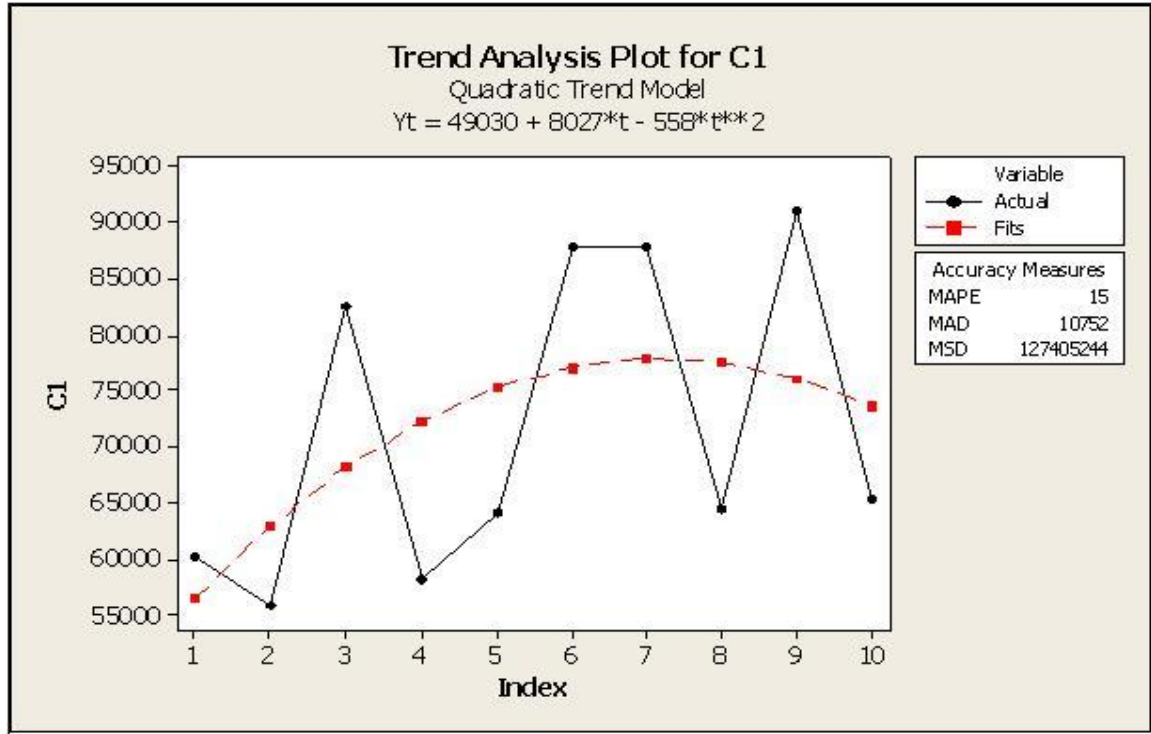
	%	%
*	<b>6,43</b>	<b>1,88</b>
	4,5	-0,24
	55	4.13
	3,7	0,17
	0,78	-3,47

\*

Statistical Office of the Republic of Serbia, (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)

1,44%.  
 3,88% (2008.),  
 2,8%.  
 2004.  
 55%  
 80% 2008.  
 4,5%.  
 5,6% 2007.





: Mini Tab

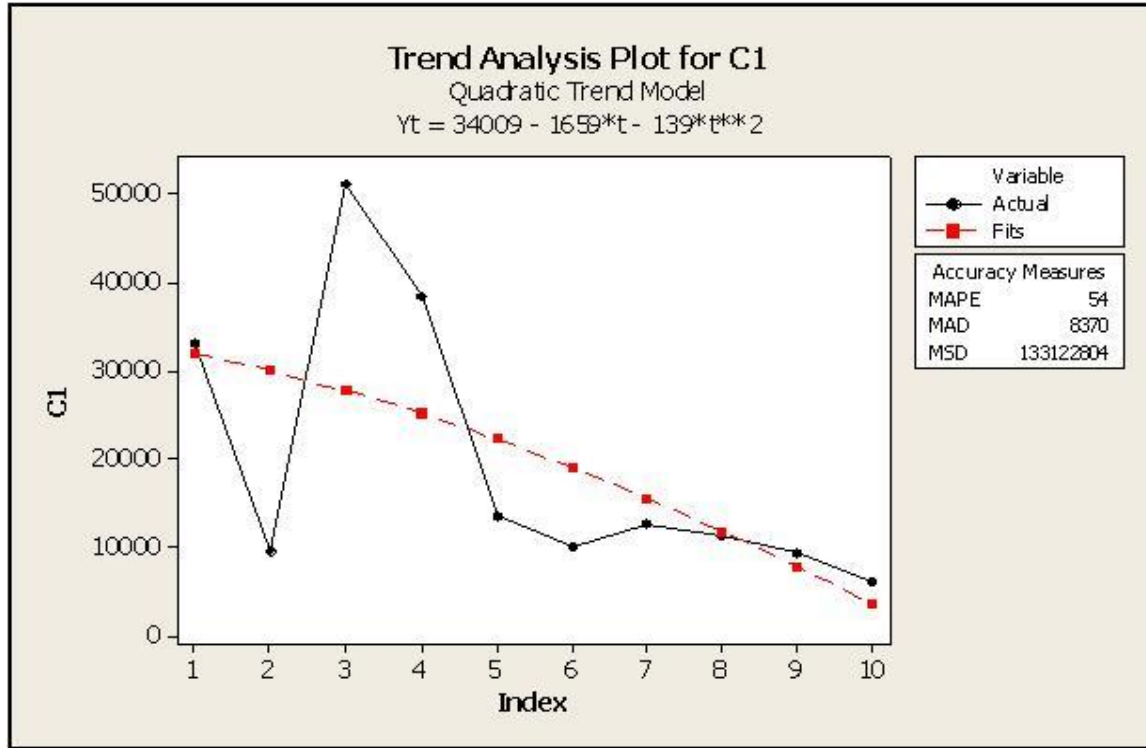
	143.837.293,43
	145.398.165,36
	127.405.243,95

: (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)



2012. , (6,43%)  
(16%).  
76,6%,  
2005. 51.234 ,  
2012. 6.116 .  
2012. 577.966  
2005. ,  
2004. 975.090  
2011. 90.935 .  
26. ,

20 -



: Mini Tab

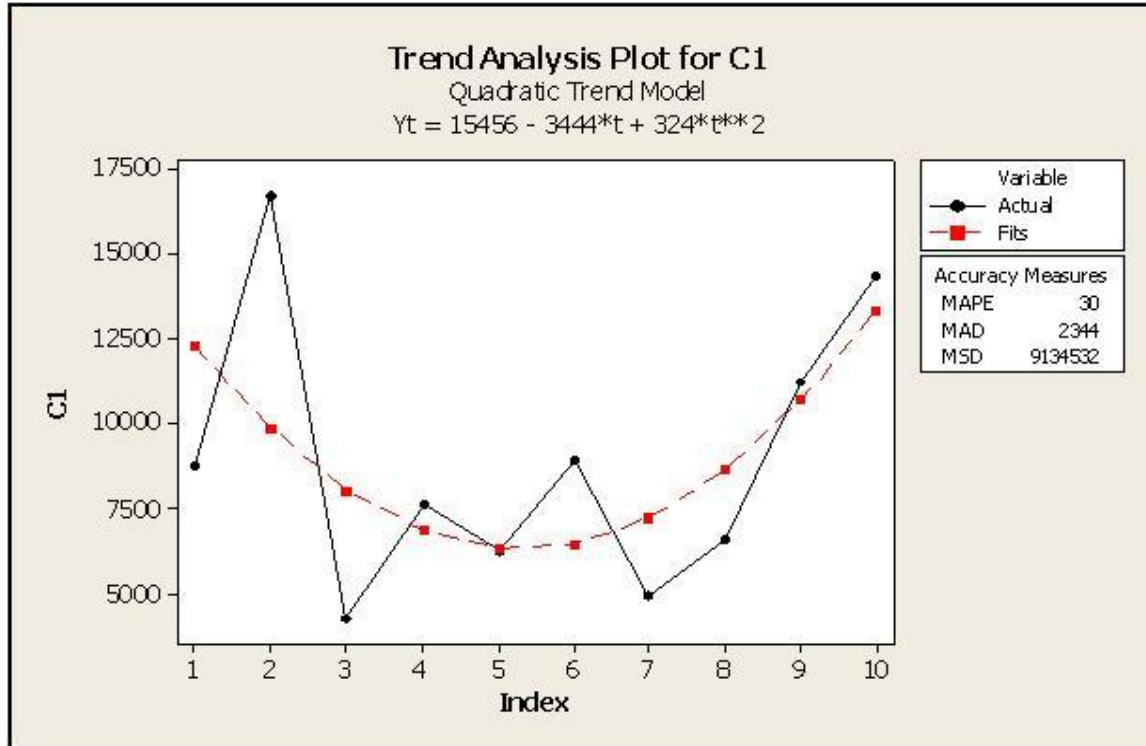
26 -

	134.139.346,87
	143.611.782,99
	133.122.803,80

: , (2003-2012), [www.stat.gov.rs](http://www.stat.gov.rs)

27.

21 -



: Mini Tab

27 -

	14.666.195,68
	14.628.653,84
	9.134.531,65

: , (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)

2009-2011,

:

□

250

□

HACCP.

200-

□

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<sup>92</sup>

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## 2.2.

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<sup>92</sup> Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium





28 -

( )

2003	570.913	246.138	86.174
2004	561.199	183.571	112.326
2005	304.351	198.030	63.870
2006	556.227	240.320	80.510
2007	680.566	245.228	99.893
2008	606.767	235.601	89.746
2009	662.631	281.868	105.353
2010	426.846	239.945	66.224
2011	581.874	265.676	90.596
2012	391.485	178.713	74.656
	<b>5.342.859</b>	<b>2.315.090</b>	<b>869.348</b>

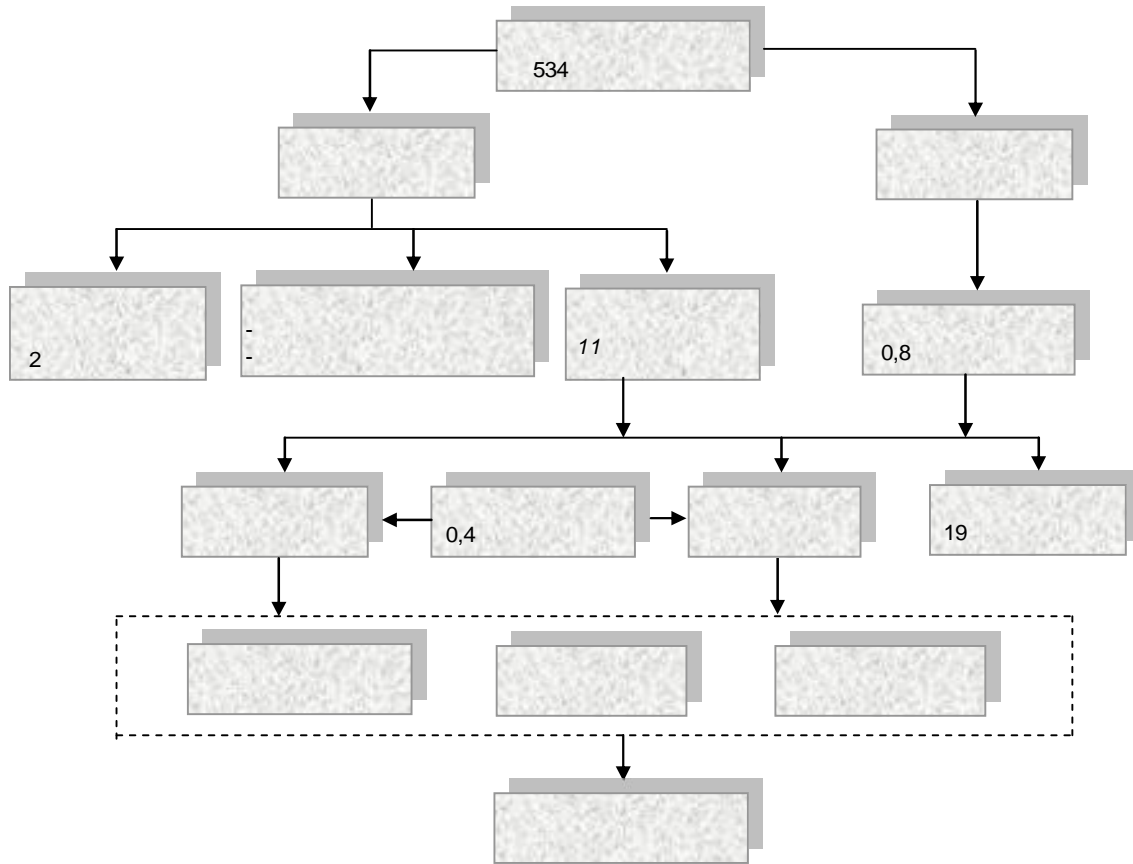
:  
[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),



8 -

(2003-2012. )



(2003-2012), [www.stat.gov.rs](http://www.stat.gov.rs)

534

7,08%

22,7%.

1,57%

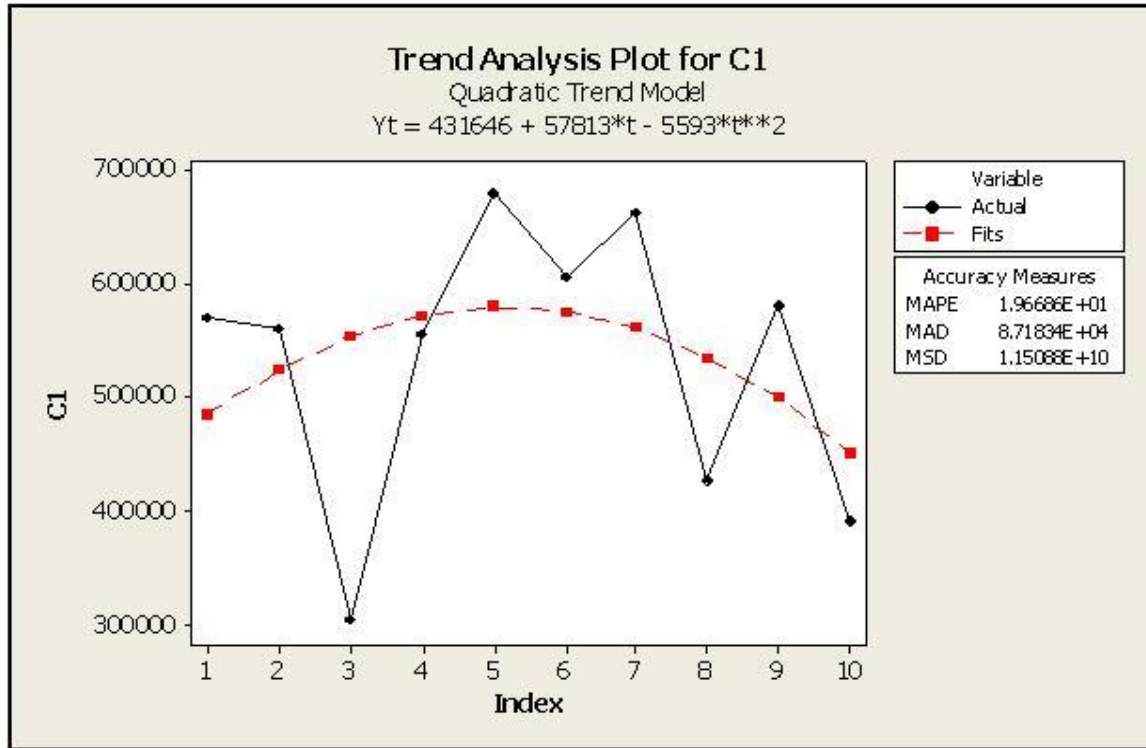
7,11%

22%.

99%

29,

22 -



Mini Tab

29 -

	14.622.817.741,21
	14.631.270.416,36
	12.787.585.408,08

[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

11,8

18,24%

43,59%.

30 –

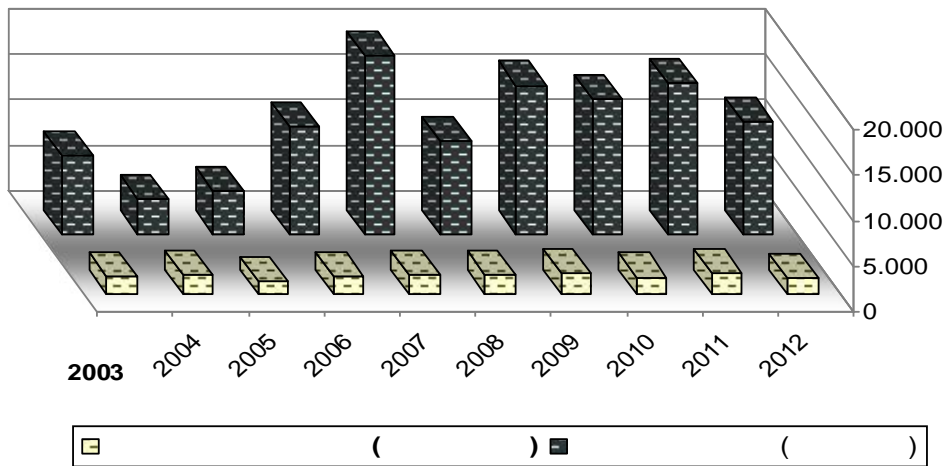
(2003-2012)

		%
-000	534	7,08
	532	7,11
	2	1,57
-000	11,8	18,24
	11	25,5
	0,8	-5,05
000	2	0,68

www.stat.gov.rs (2003-2012),

25,5%  
5,05  
43,9%  
93%.

23 –



www.stat.gov.rs (2003-2012),

0,68%

2  
43,59%.

85%.

31 –

(2003-2012)

	%	%
*	<b>2,6</b>	<b>5,84</b>
	2,45	4,8
	43,7	-6,52
	0,39	-6
	2,06	17,17

\*

[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

2,2%.

3,46% 2010. , 0,69% 2004.

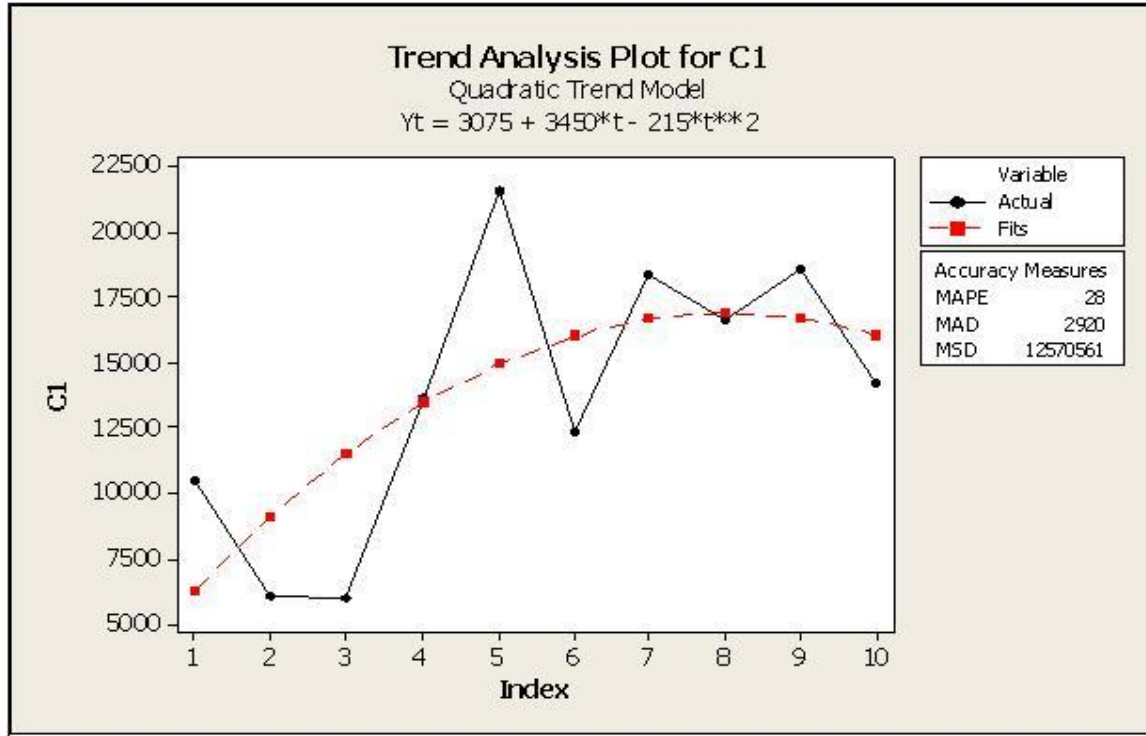
43,7%,

2,06%.

2006. 59,3%.

32.

24 -



Mini Tab

32 -

	16.673.331,05
	18.825.822,98
	13.967.290,14

(2003-2012),

[www.stat.gov.rs](http://www.stat.gov.rs)

6%,

1,57%,

2,6%,

5,84%

34,13%.

(97,4%)

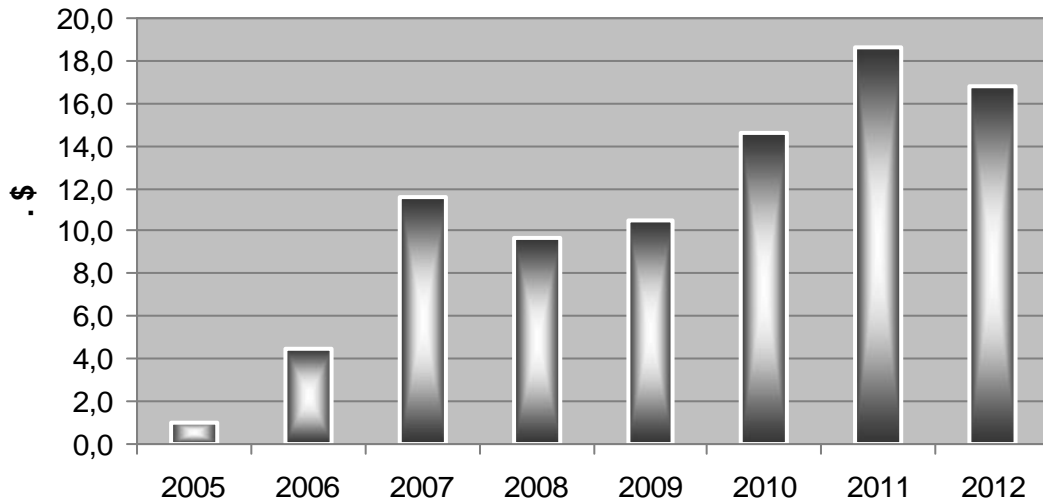


( , ),  
 2009. \$ 1,04 / .<sup>93</sup>

2004. 2009. ,

10-15 .  
 2006. 2009.

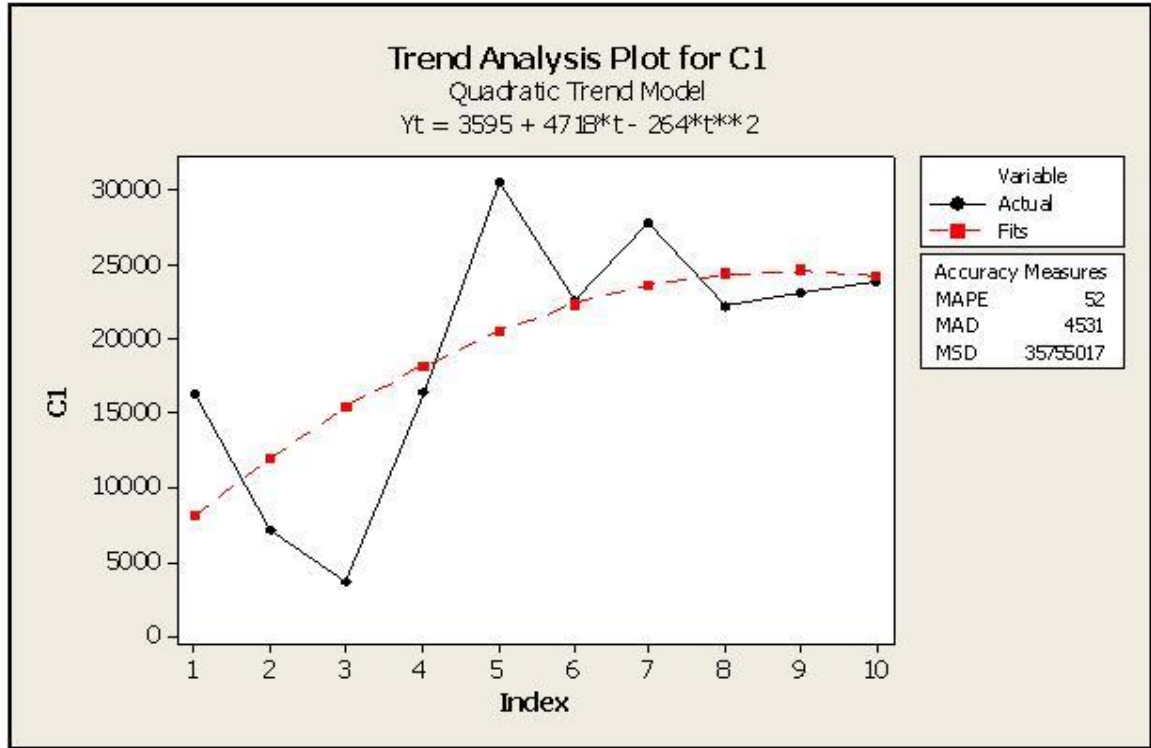
25 – ( . )



: UN Comtrade, <http://comtrade.un.org/>

<sup>93</sup> Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

26 –



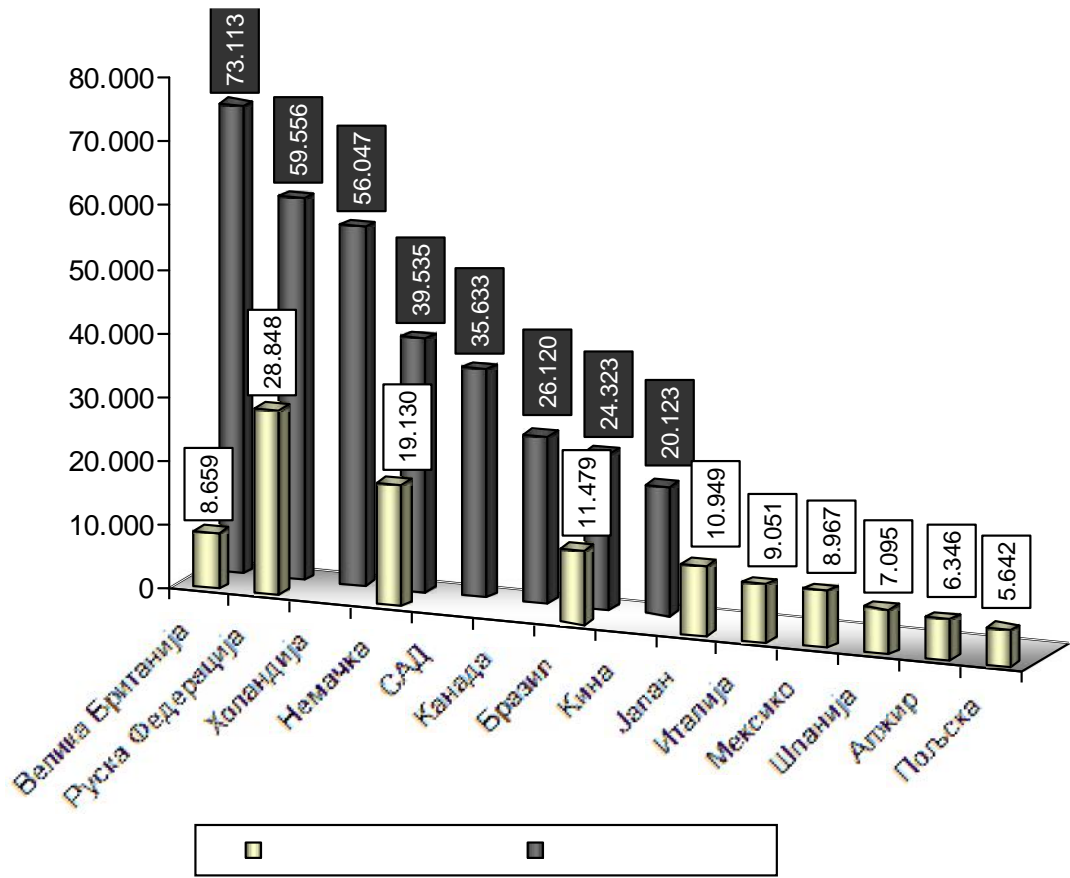
: Mini Tab

33 -

	39.427.875,86
	47.647.621,41
	35.755.016,95

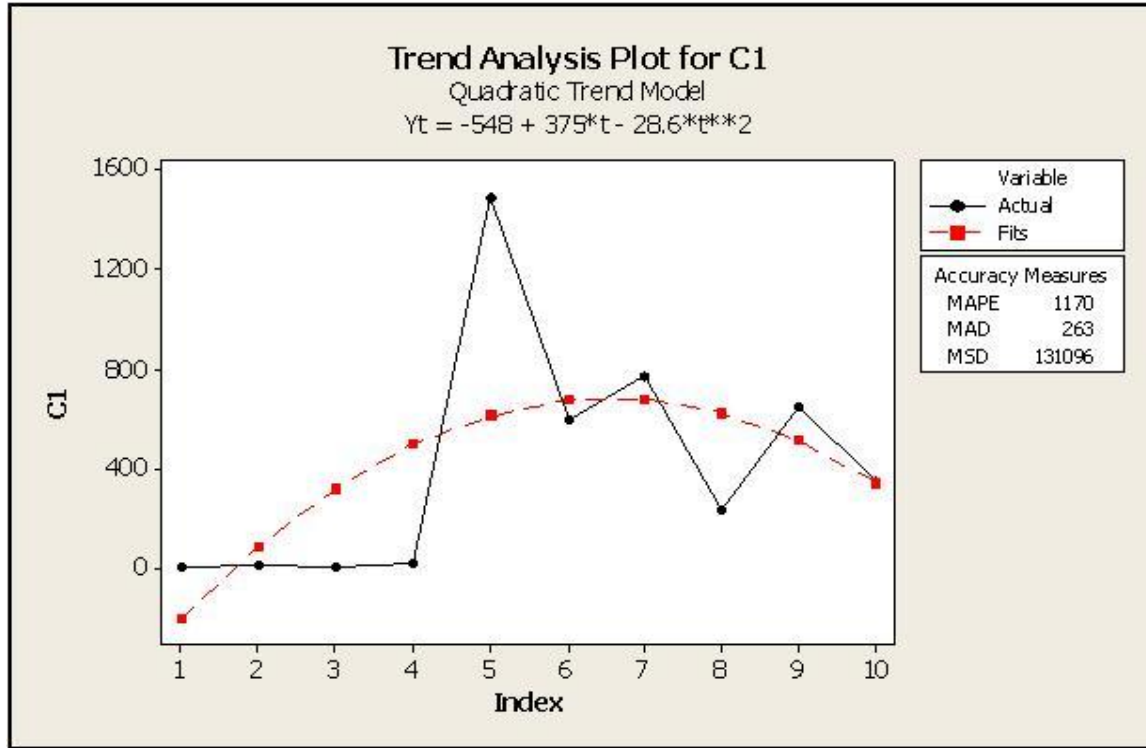
: , (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)





: Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

28 -



: Mini Tab

34 -

	174.187,97
	358.999,19
	131.096,01

: , (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)

400-450.000

, 80%  
 ( 200 ,

,  
 600 800

---

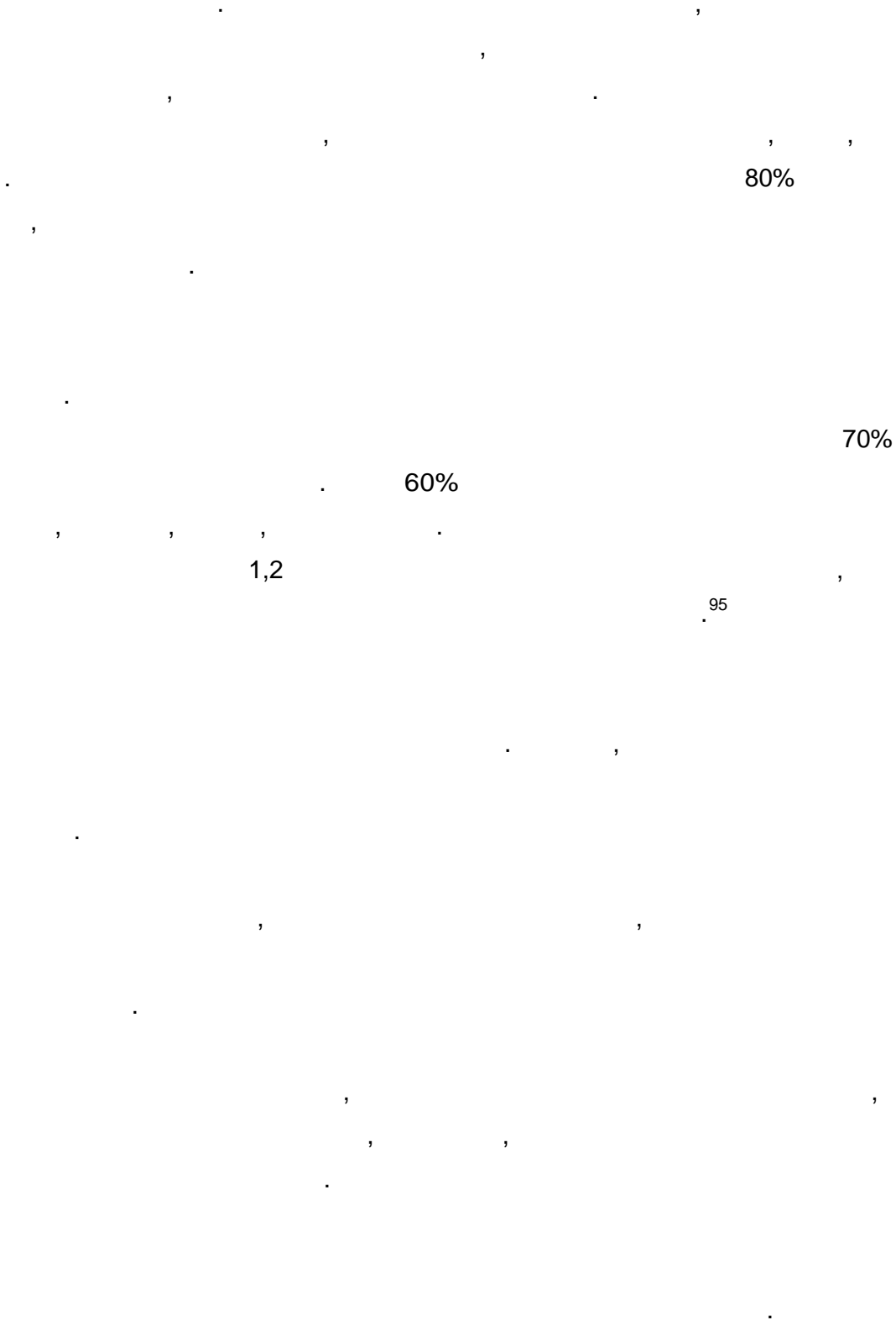
),

94

### 2.3.

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<sup>94</sup> Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium





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4,5 5,5

96

35 -

( )

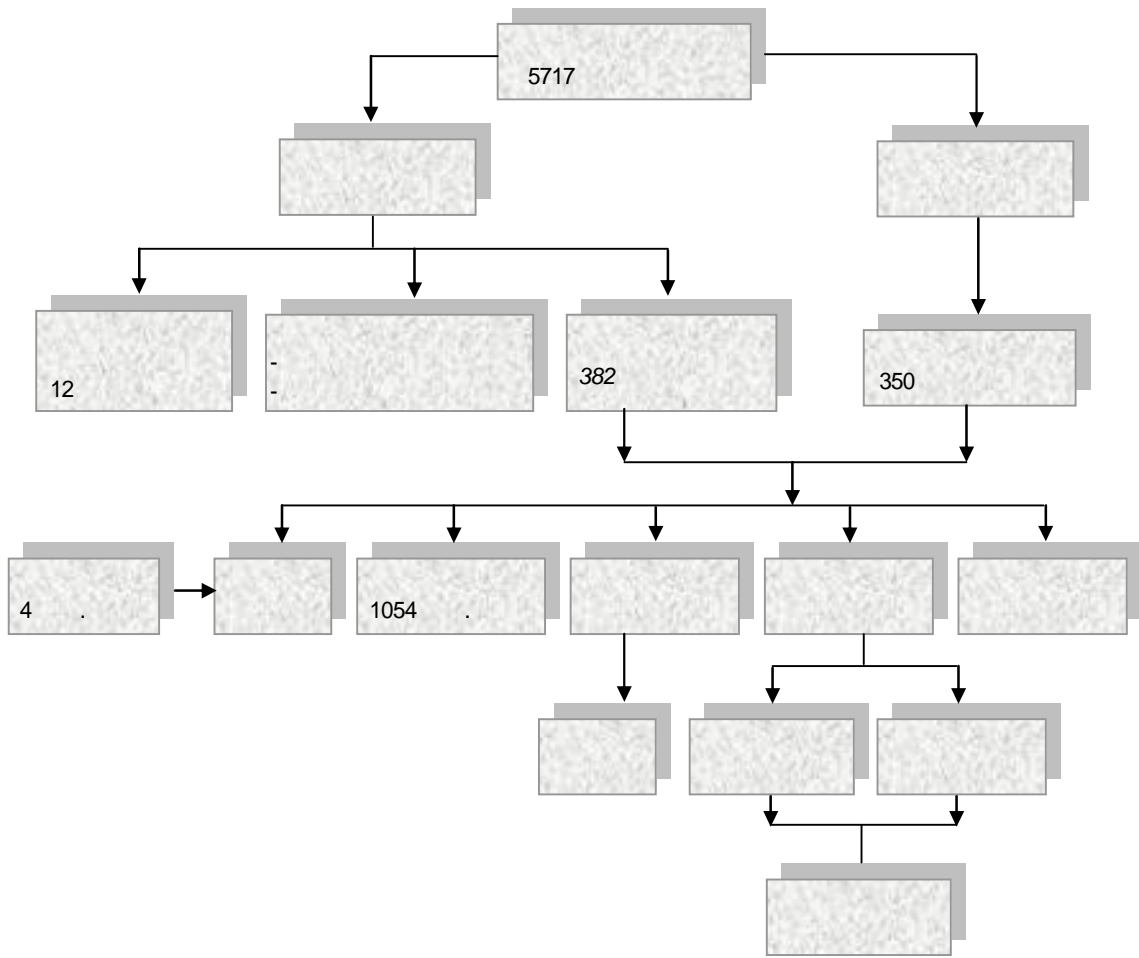
2003	3.817.338	1.364.787
2004	6.569.414	2.758.017
2005	7.085.666	2.007.060
2006	6.016.765	1.875.335
2007	3.904.825	1.863.811
2008	6.158.122	2.095.403
2009	6.396.262	2.067.555
2010	7.207.191	1.630.404
2011	6.479.564	2.076.237
2012	3.532.602	1.910.914
	<b>57.167.749</b>	<b>19.649.523</b>

:  
[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

( )

9 - (2003-2012. )



(2003-2012), [www.stat.gov.rs](http://www.stat.gov.rs)



5.717

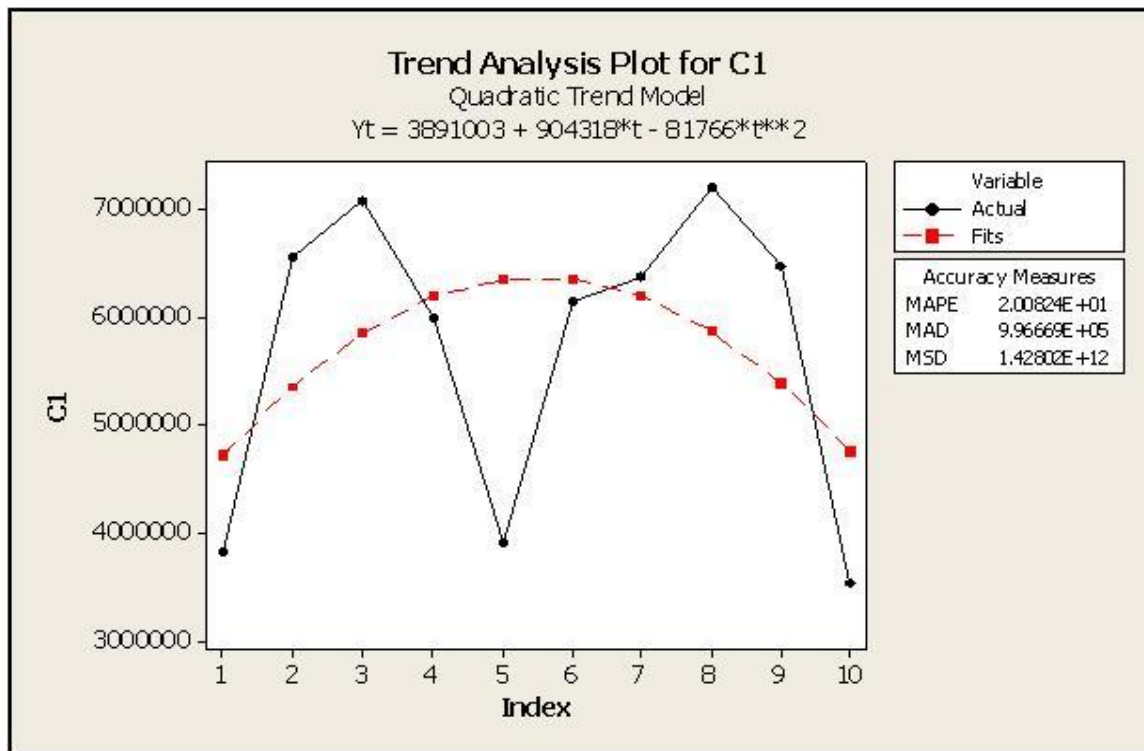
4,48%

24,61%.

4%.

36.

29 -



:

Mini Tab

36 -

	1.781.018.432.943,09
	1.781.455.780.624,83
	1.428.017.669.021,20

: , (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)

732 ,  
 12,52% .  
 ( 43,56%),  
 (68%),  
 30,77%.  
 (24,51%), 3,81%.

37 -

(2003-2012)

		%
<b>-000</b>	<b>5.717</b>	<b>-4,48</b>
	5.027	-4,49
	690	-4,37
<b>-000</b>	<b>732</b>	<b>12,52</b>
	382	24,51
	530	3,81
000	12	-9,82

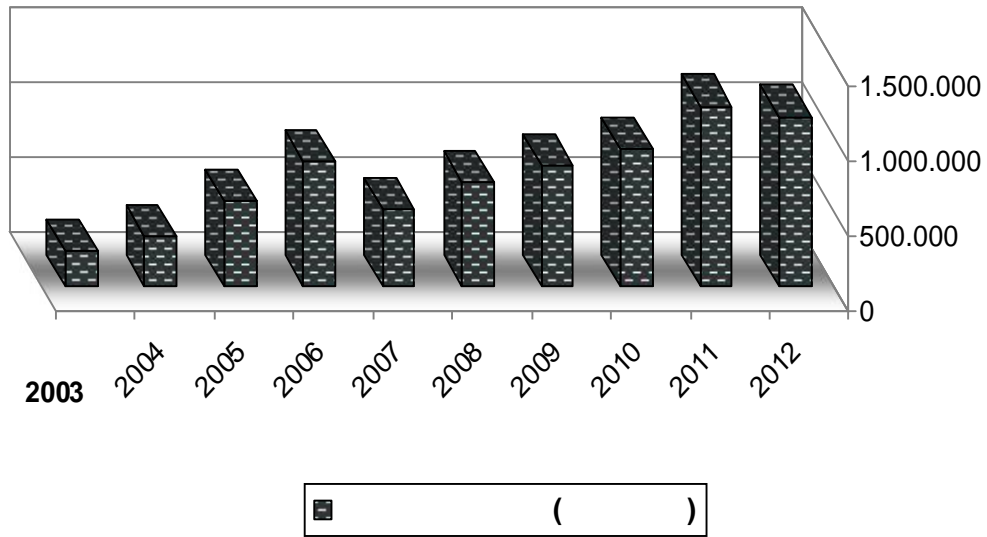
: , (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)

- ,
- ,
- .

(52%)

88%

30 –



[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

13%,  
17,1%,

59%.

32% (2012.),

5,4% (2004.).

38 –

(2003-2012)

	%	%
*	<b>13,73</b>	<b>17,1</b>
	8,41	27,24
	52,36	8,56
	0,26	-5,58
	8,15	30,37

\*

www.stat.gov.rs (2003-2012),

52,36%

97% 2012.

8,15%

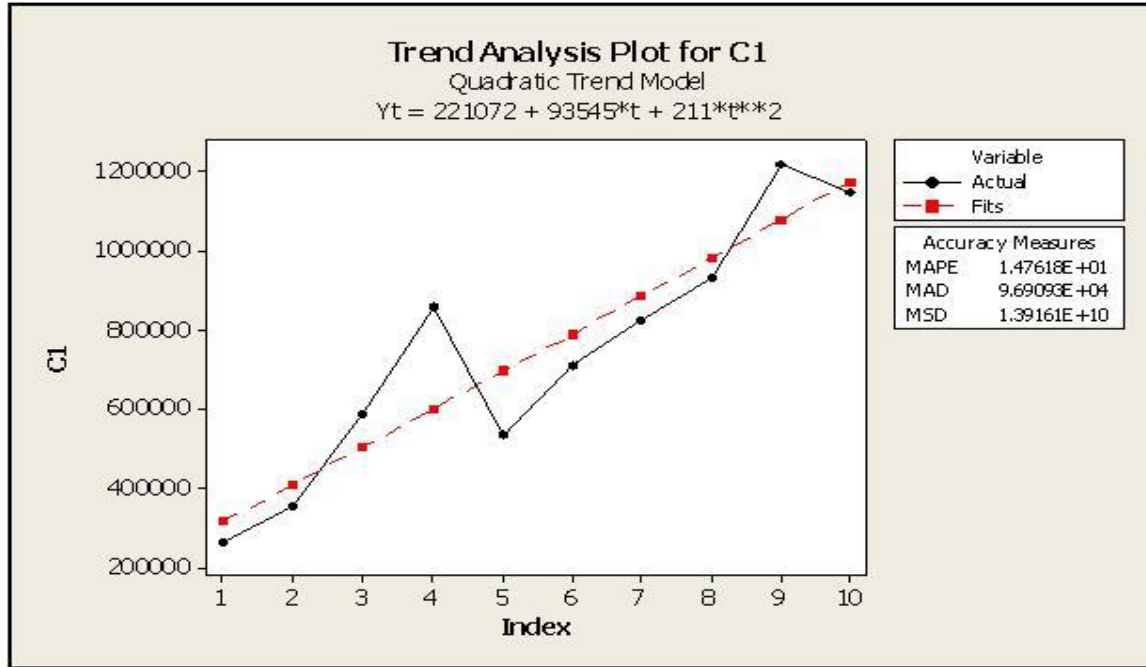
24% 2012.

0,26%,

5,58%.

39,

31 –



: Mini Tab

39 -

	13.918.455.337,42
	17.086.068.561,64
	13.916.096.603,78

: (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)

87%

49%

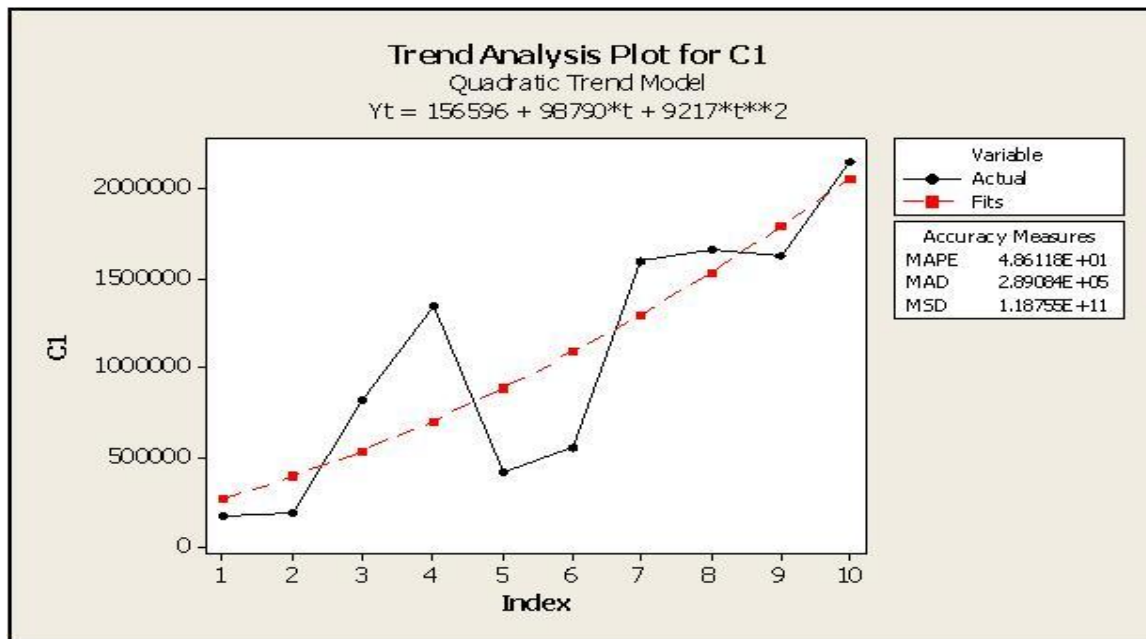
92%,

1.054

( )

40.

32 -



:

Mini Tab

40 -

	123.240.526.040,97
	140.684.057.301,45
	118.755.231.265,63

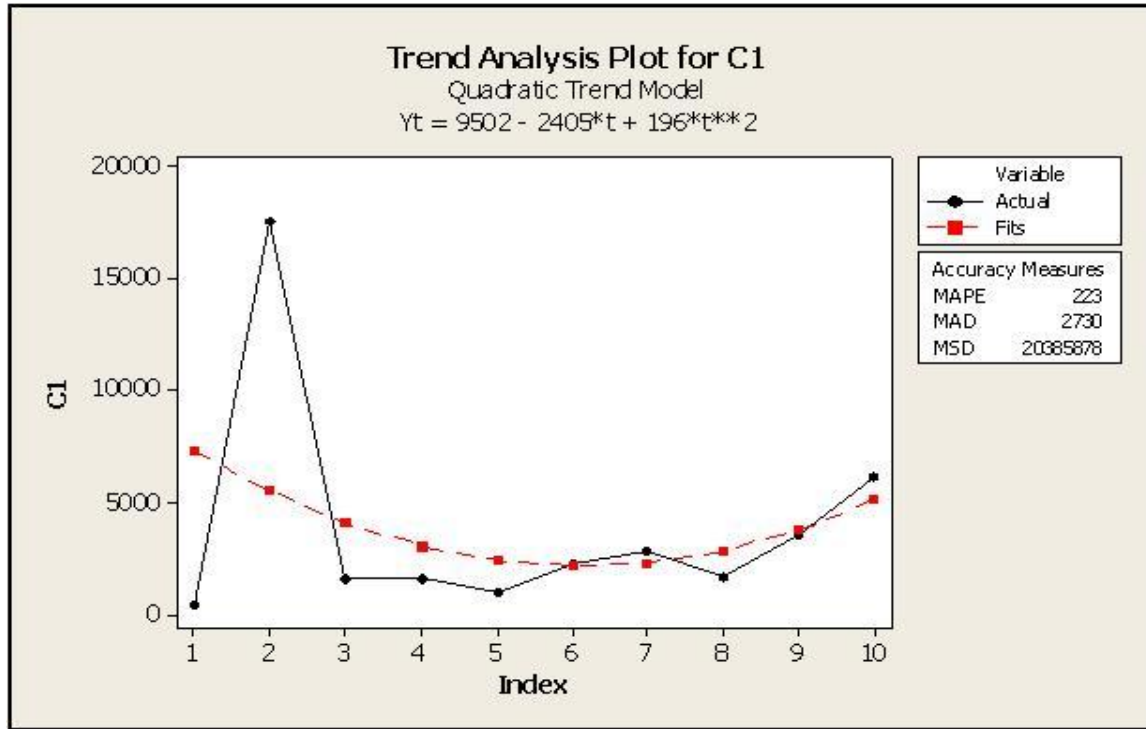
:

[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

41.

33 -



: Mini Tab

41 -

	22.416.233,18
	24.026.182,23
	20.385.878,09

:  
[www.stat.gov.rs](http://www.stat.gov.rs)  
 2012. (2003-2012),

2.4.

36

1996.



20.

1.659.000,  
57%

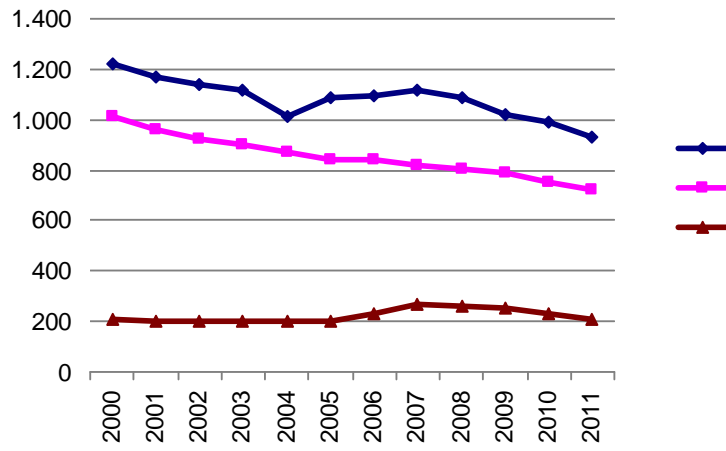
21.

2004., 2005. 2006.

30.000

225.000

34 –



:

-

,

97

( )

( ).





50%

70%

50-70%,

31,5%

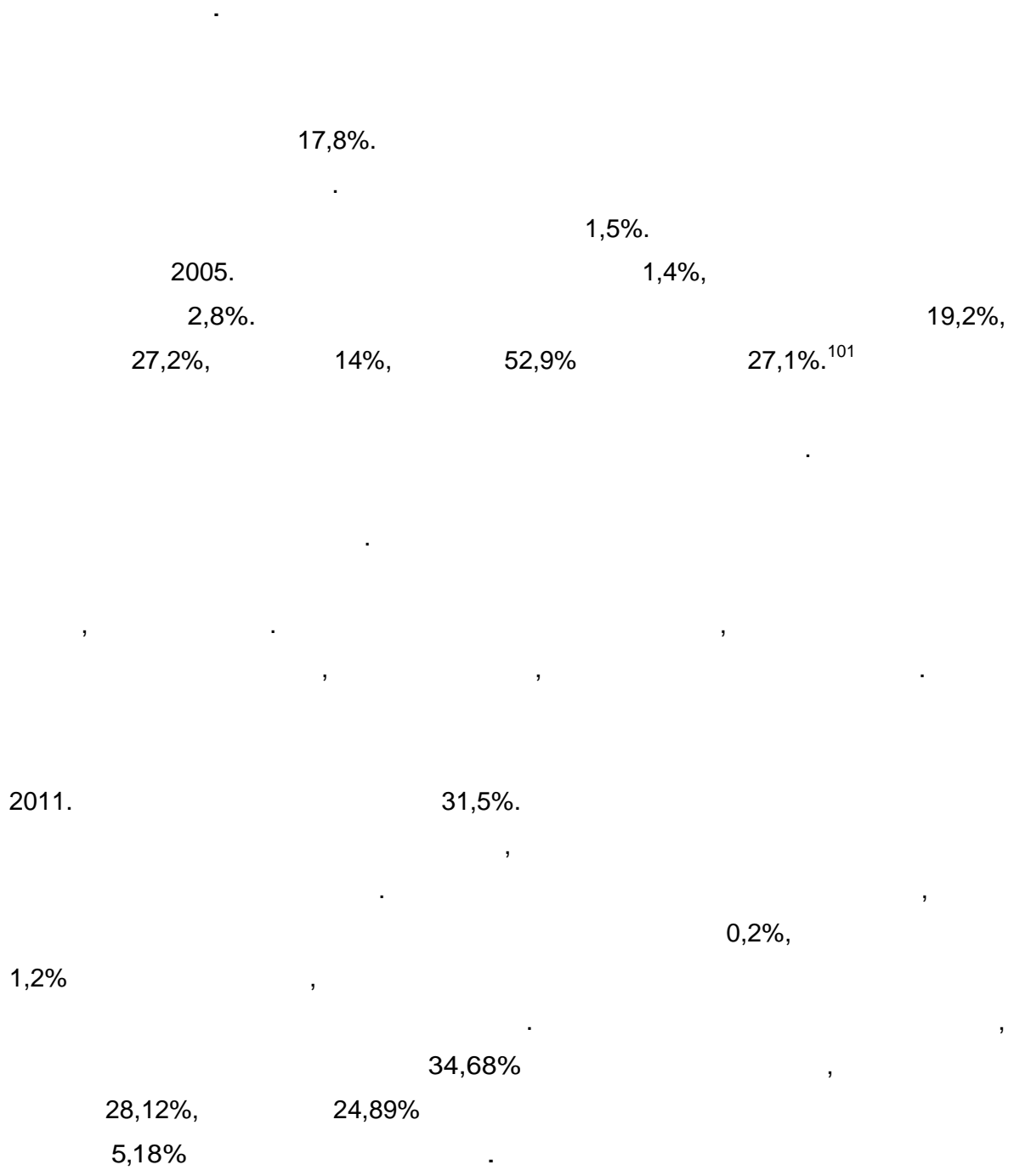
2011.

0,27

0,42

99

500<sup>100</sup>





2009.

2012.

2008.

43 –

2005. 2013.

	2005	2006	2007	2008	2009	2010	2011	2012	2013
\$	63,50	68,80	60,00	52,20	71,60	75,00	67,10	84,40	84,20
€	81,70	87,00	81,40	83,00	95,60	99,30	99,60	111,90	112,20

: <http://www.raiffeisenbank.rslcode/navigate.aspx?id=290>,

480

44 –

2005. 2013. ( , )

	2005	2006	2007	2008	2009	2010	2011	2012	2013
	125	155	135	135	170	162	195	220	215





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105

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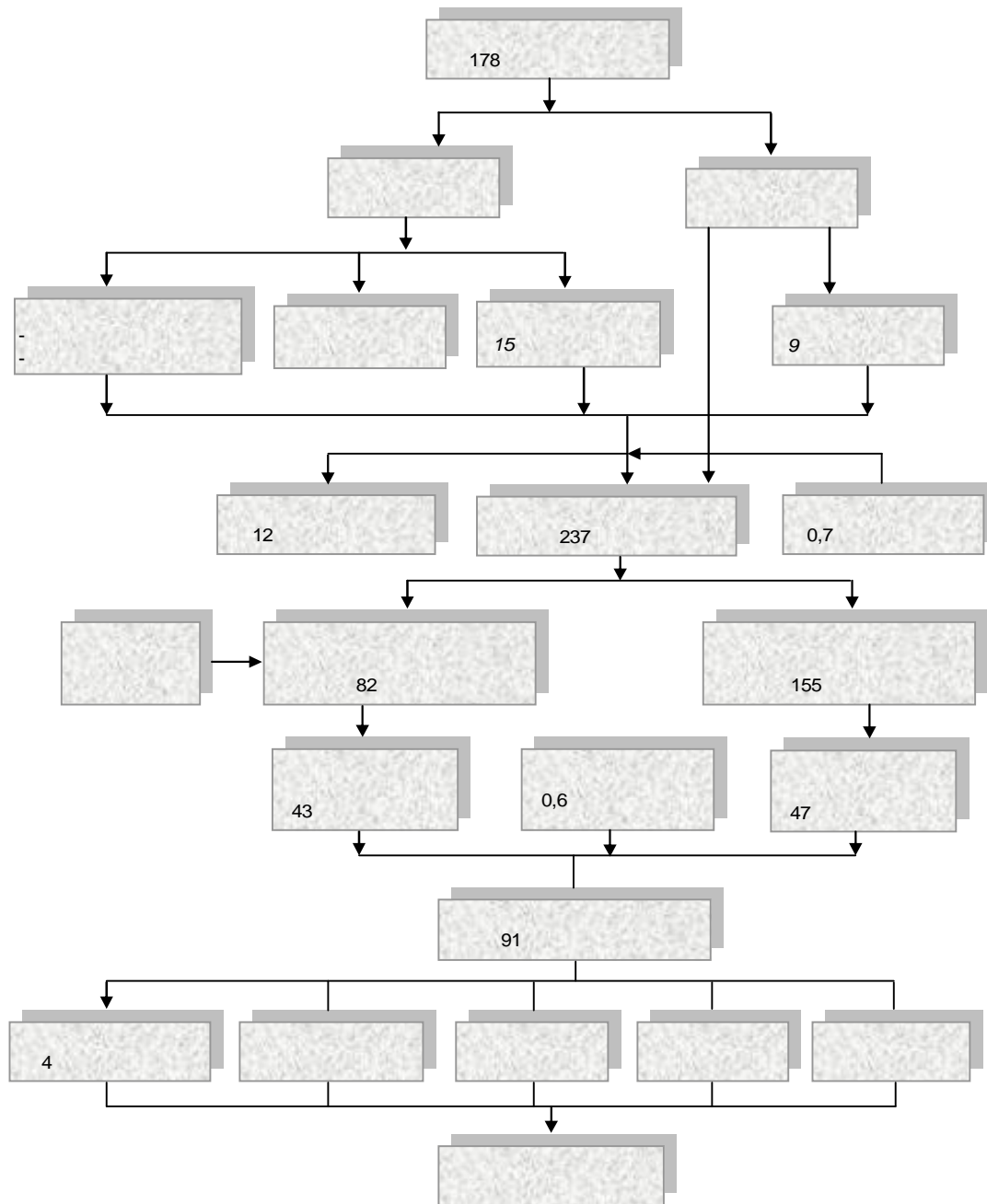
.

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[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

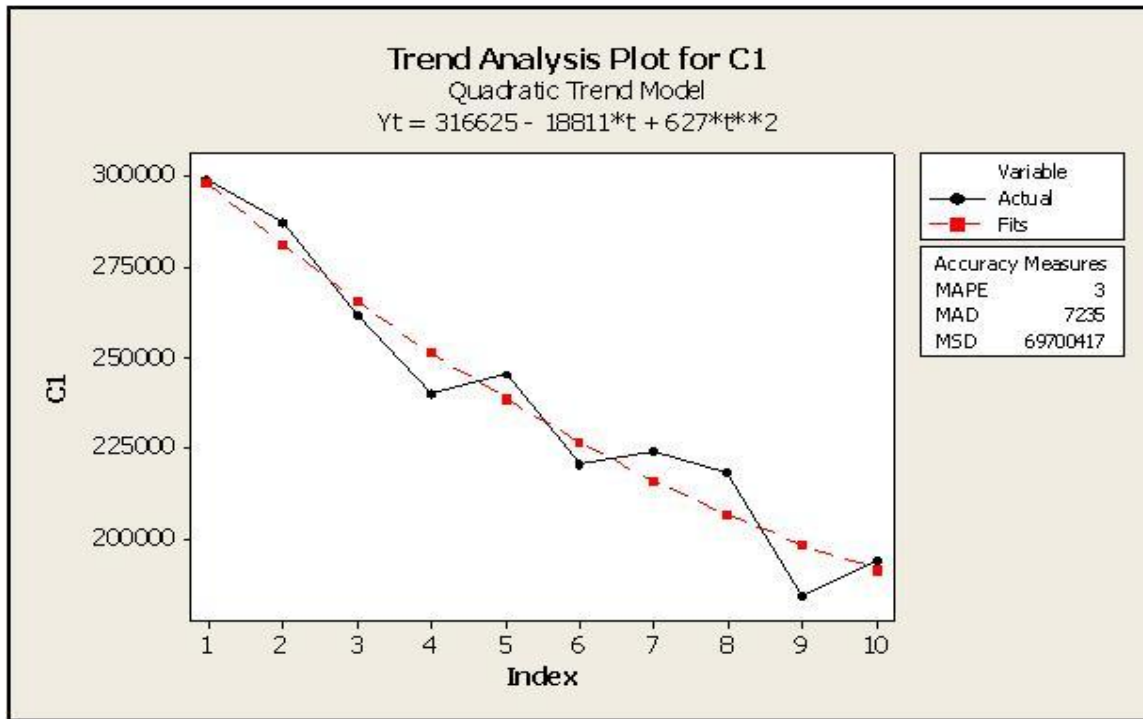
26%

( ).

178 ,  
 1,64%. , 5,68%.

45,

36 -



: Mini Tab

45 -

	90.450.606,06
	75.150.230,13
	69.700.416,67

: (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)

46 –

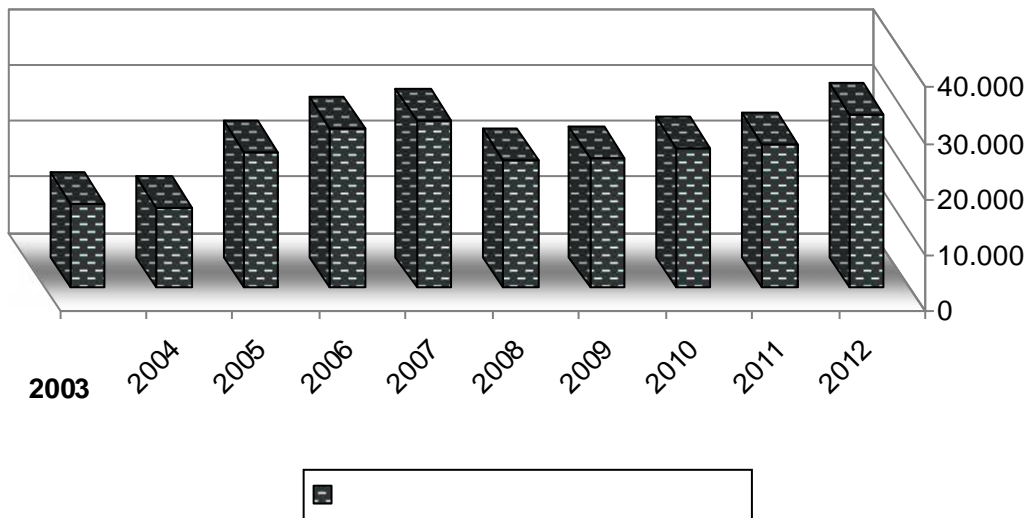
(2003-2012)

		%
- 000	178	-1,64
000	237	-5,05
- 000	82	47,48
- %	35	18
- 000	91	-1,67

www.stat.gov.rs (2003-2012),

237  
5,05%  
15,78%.  
1,64%, 5,68%.  
91 1,67%,  
7,74%.  
72,26%.

21 , 2004. 5 (62%).  
2012  
37 –



[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

35%.  
6,92% 22,9%.  
45,75% (2007.), 21% (2003.).

47 -

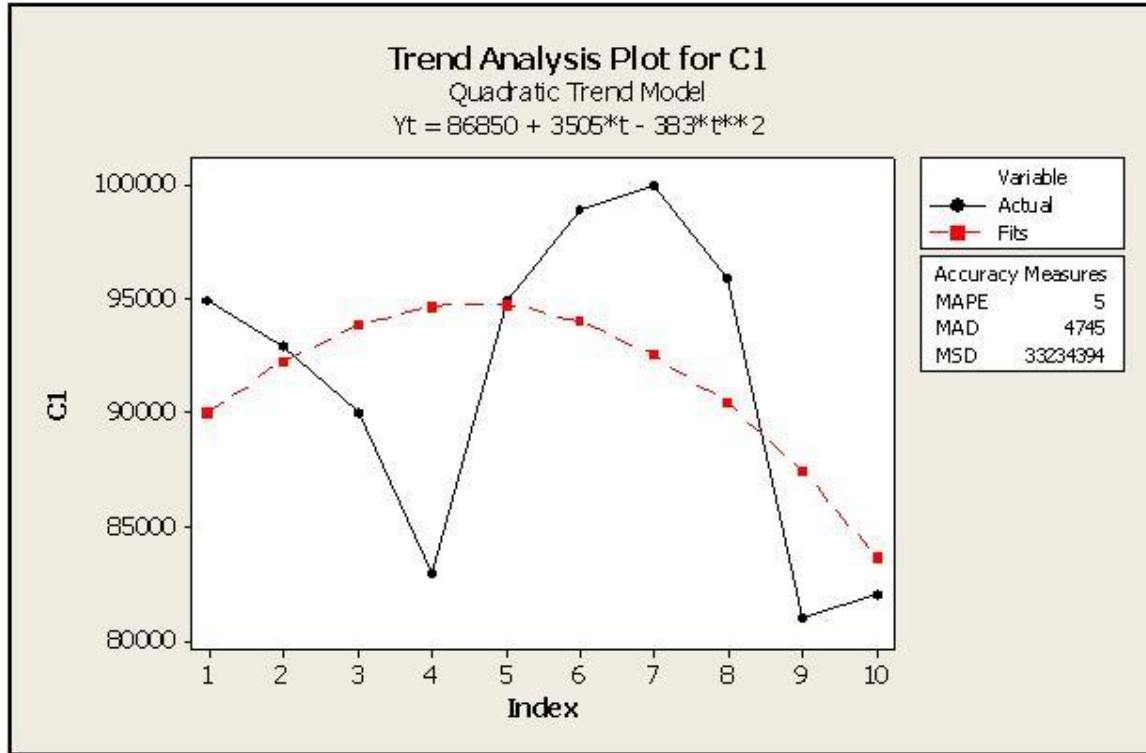
( )

2001	93	253	62
2002	97	277	65
2003	95	258	59
2004	93	242	65
2005	90	253	67
2006	83	255	75
2007	95	289	70
2008	99	266	76
2009	100	252	80
2010	96	269	84
2011	81	271	103
	<b>1.022</b>	<b>2.885</b>	<b>806</b>

:  
[www.stat.gov.rs](http://www.stat.gov.rs)

(2003-2012),

38 –



:

Mini Tab

48 -

	40.962.424,24
	41.111.667,22
	33.234.393,94

:

[www.stat.gov.rs](http://www.stat.gov.rs)

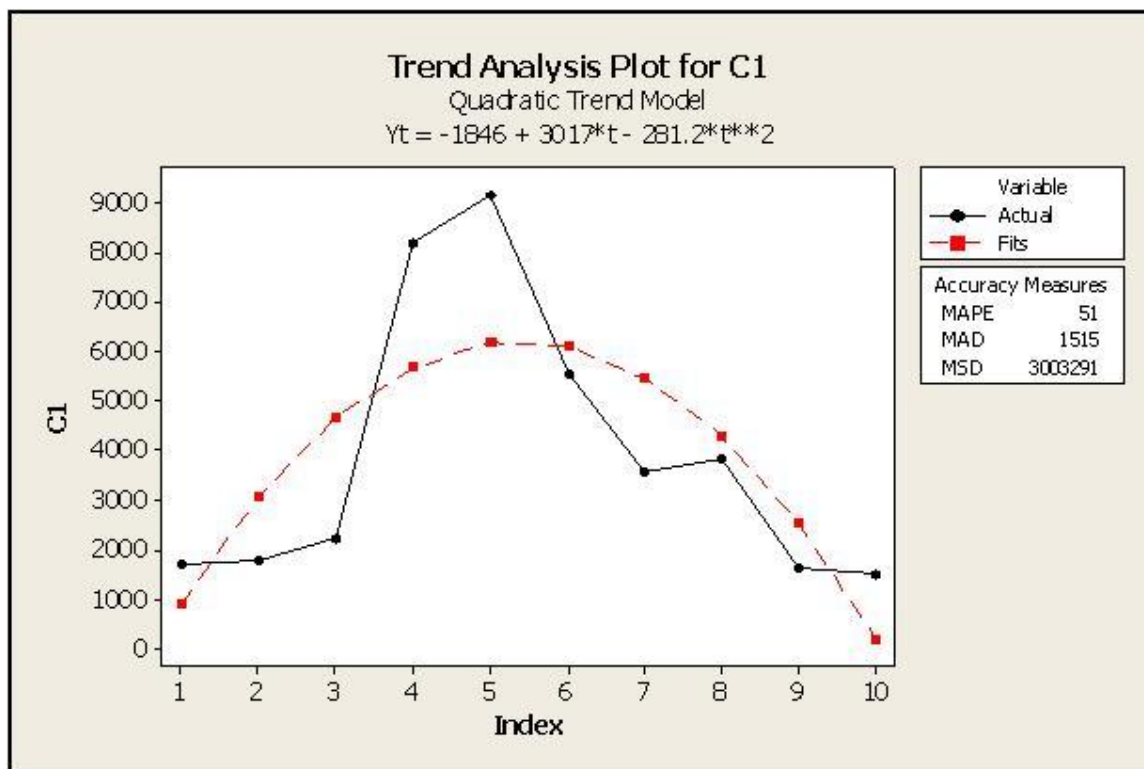
(2003-2012),

86,5%

46%



39 –



: Mini Tab

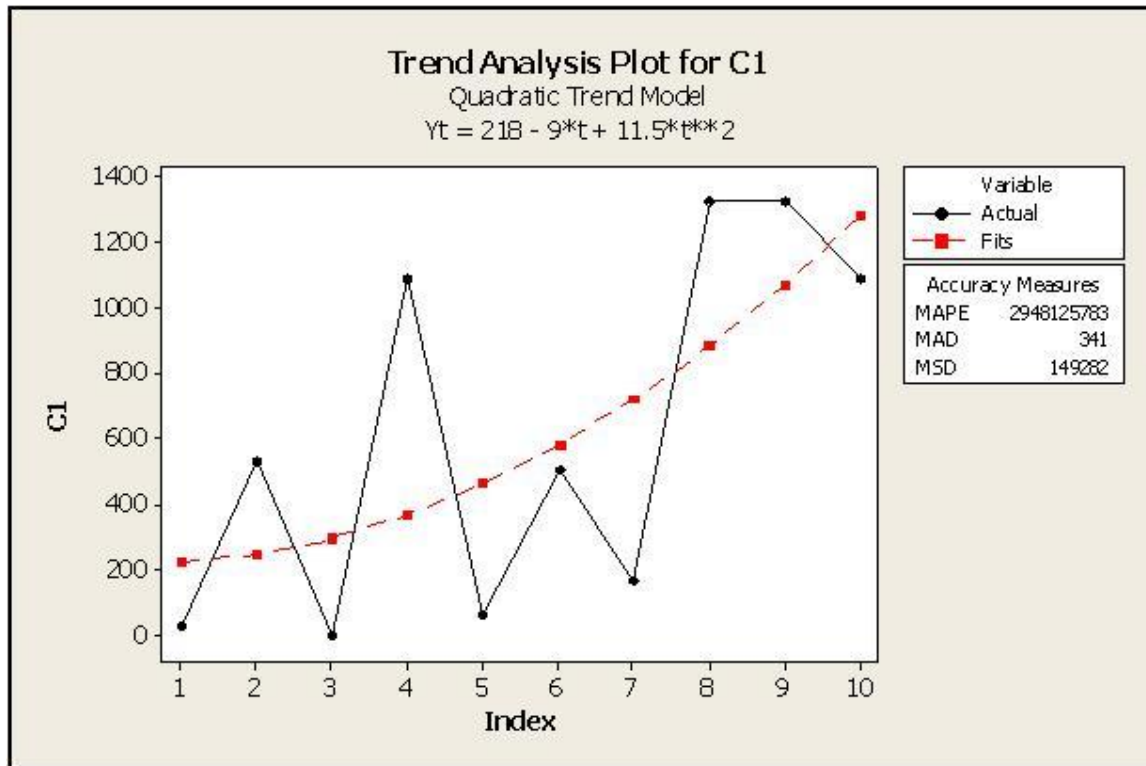
49 -

	7.177.194,37
	7.195.380,30
	3.003.290,90

: , (2003-2012),  
[www.stat.gov.rs](http://www.stat.gov.rs)

2005.

40 -



Mini Tab

50 -

	156.304,87
	* ERROR * Some data are non-positive; cannot fit growth model.
	149.281,57

(2003-2012),

[www.stat.gov.rs](http://www.stat.gov.rs)





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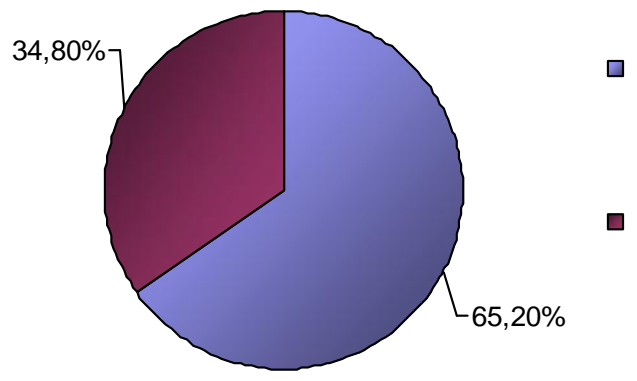
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3.294.000      5.056.000  
 65,2%      34,8%

41 –      2011.



:      2012. ,

2005. 2012.  
 0,32%,

107

18/2003 72/2011).

106  
 107

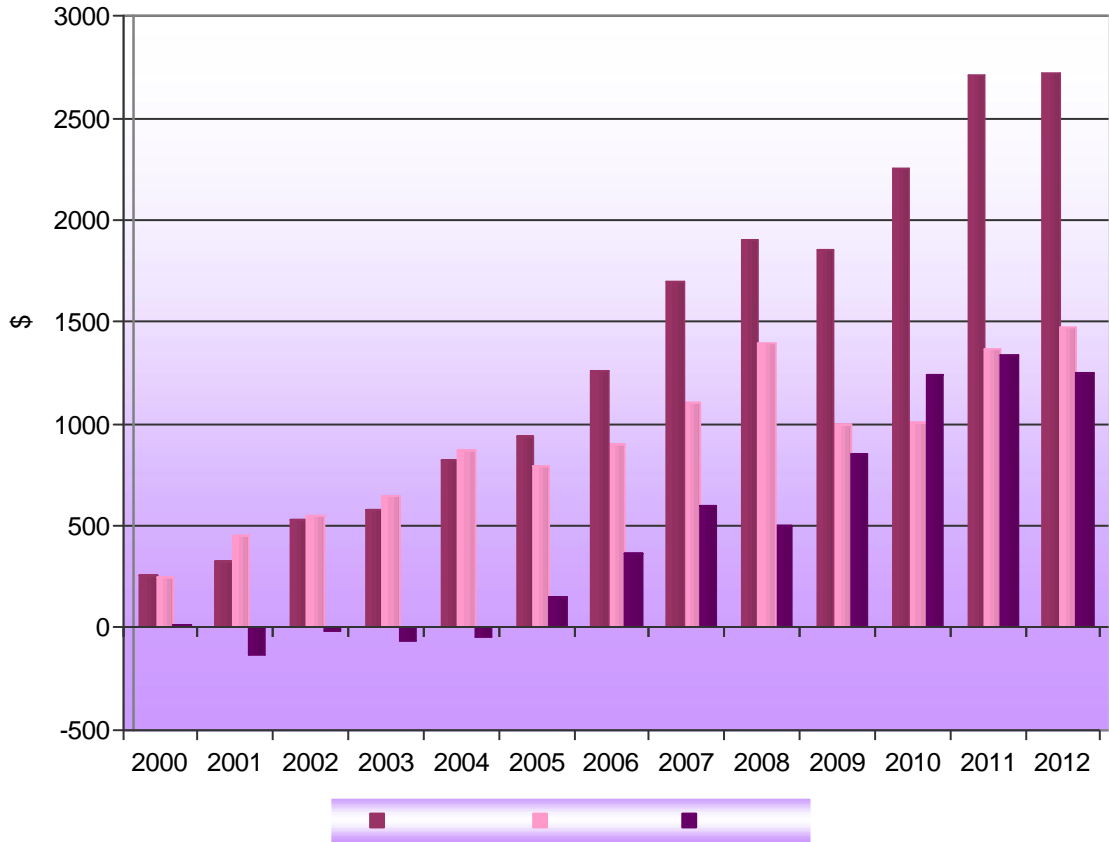
2012.  
 2005., 2006., 2007., 2008., 2009., 2010., 2011., 2012.





2011. , 23% ,  
8% .

42 -



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2011.

78%,

22%.

2005.

2011.

, 46%

, 34%

20%.



114

115

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114

115

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, 2000.

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, 1998.



51 –

		%
	6.288	0,80
1	208.100	26,70
1,01 – 3,00	254.832	32,70
3,01 – 5,00	135.161	17,40
5,01 – 8,00	96.843	12,40
8,01 – 15,00	62.326	8,00
15	15.341	2,00
	<b>778.891</b>	<b>100,00</b>

: 2002. – ,

17,4% 3-5 ,

5-8

12,4%

2-3 ,

8-15 ,

10%

5-8









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119

( ),

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<sup>119</sup> Kunston, D.R. et al., (2007), Agricultural and Food Policy, 6<sup>th</sup> ed., New Jersey, Pearson Prentice Hall

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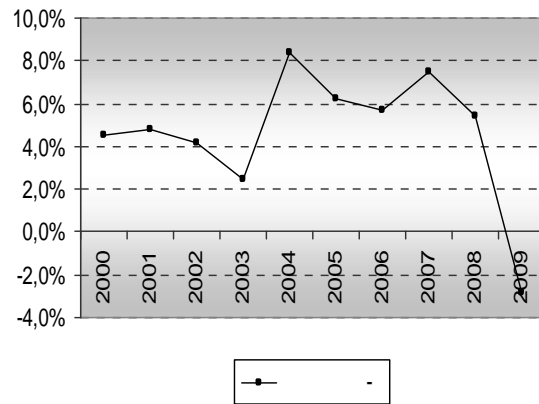
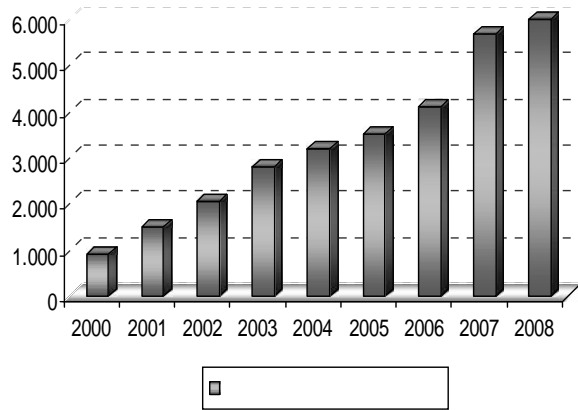
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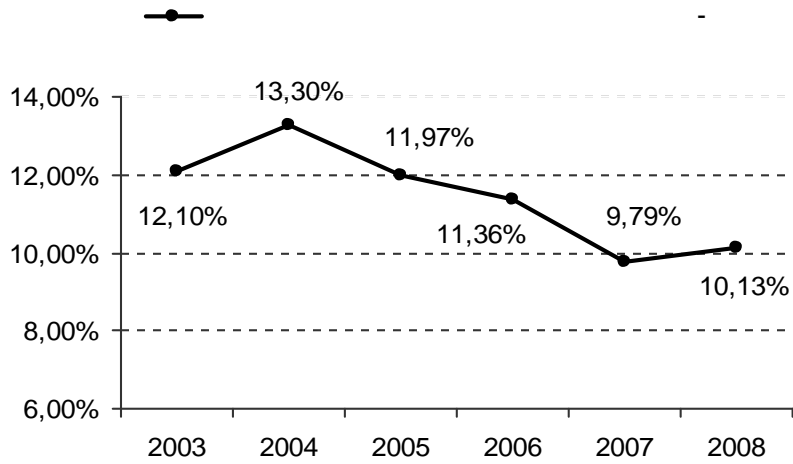
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43 -



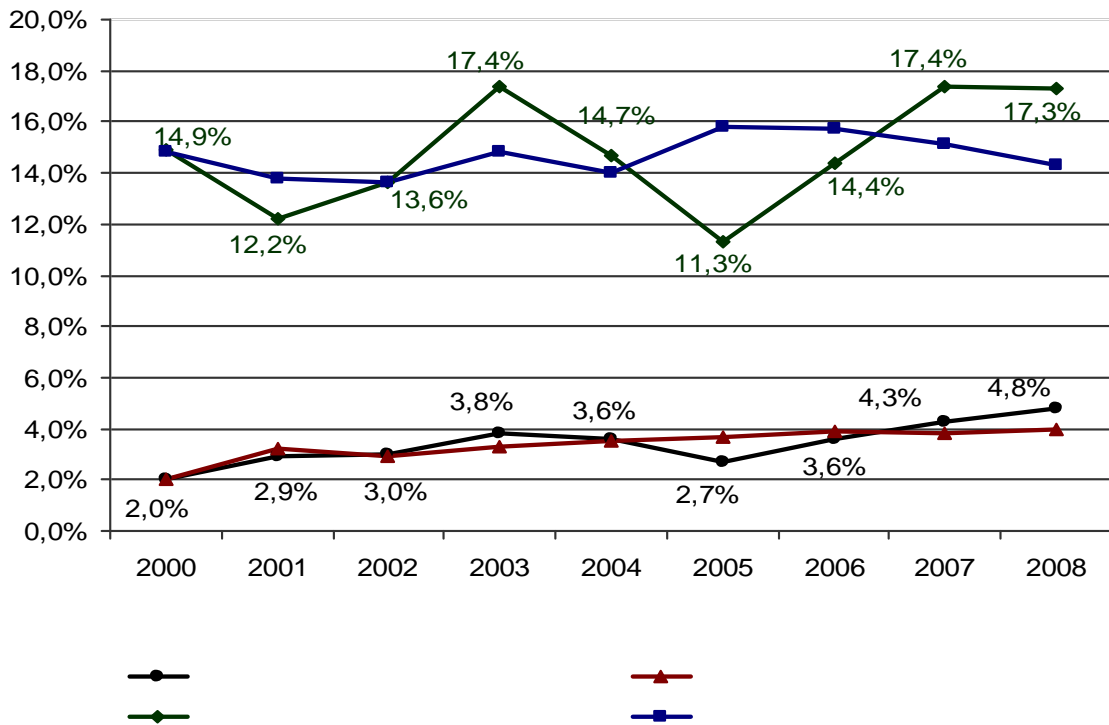
: Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report  
– March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

44 –



: Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report  
 – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

45 –



: Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report  
 – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

10% ( )

2000. :

52 -

<b>XX</b>
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<b>XXI</b>

: Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

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<sup>120</sup> Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

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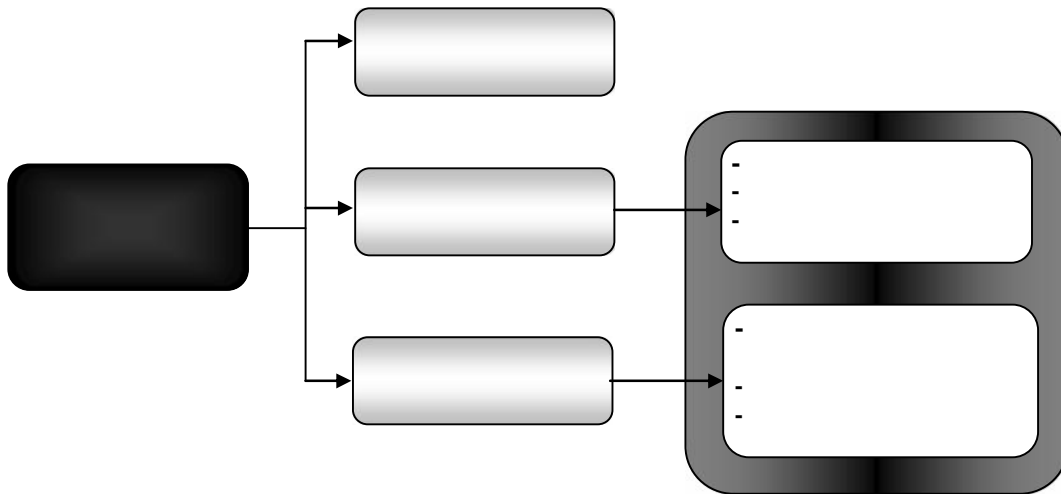
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, 2003, . 102

127

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, 2008, 395.

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HACCP

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128

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; (3)

; (4)

(5)





54 -

/		
SETRA 2006		2006
ERTA (Eigoreap Rgee Tgasle Agreement)		2008
		2008 ( )
		2011-2013
,	,	2009-2011 ( )

: , <http://siepa.gov.rs>

( )  
). 2010.  
125 . , 2011.  
165 . , 2012.  
147 . 129

□ ( ), (SAA , ( ;

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□ , ;

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□ ;

130

2009-2013.

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<sup>130</sup> Preparation of Fruits & Vegetables sector study for the IPARD Programme Final Report – March 2010, Agri-Livestock Consultants Ltd, Member Firm of Cardno Agrisystems-Led Consortium

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131

(PDO - Protected Designation of Origin)

(PGI - Protected Geographical Indication).<sup>132</sup>

133

131

2009-2013.,

132

2009. <http://www.mpt.gov.rs/download/ruralnirazvoj-strategija.pdf> 10.01.2012.

133

2009-2013.,

2009. <http://www.mpt.gov.rs/download/ruralnirazvoj-strategija.pdf> 10.01.2012.

2008, . 211

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55 –

( . )

	2011	2012		2011	2012		2011	2012
	11.779,5	11.353,6	96,4	19.861,9	19.013,3	95,7	-8.082,4	-7.659,7
	2.696,7	2.716,8	100,7	1.404,7	1.470,2	104,7	1.292	1.246,6
	22,9	23,9		7,1	7,7			

: , 2012. -

2012. 4.187  
 2.716,8 1.470,2  
 1.246,6 3,5%  
 2011. 2011.  
 0,7%, 4,7%.  
 2012. 184,8%,  
 191,9%.

2012.

















10.000

2003.

764

2004.

2004.





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135

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135

, 2008.

268



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(SAPARD IPARD)

2,97 2.521.190<sup>137</sup>

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1953., 1961. 1971.

1981., 1991. 2002.

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100



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.138

1.

(trademark)

2.

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<sup>138</sup> Ceranic, S., Maletic, R., Jankovic-Soja, S., *Small and medium enterprises as support to development of agrobusiness of RS*, The role of knowledge, innovation and human capital in multifunctional agriculture and territorial rural development, Thematic proceedings, European association of Agricultural Economist, Belgrade, 2009, pg.141-147.

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2006.

European Free Trade Agreement) (Central

27

141

142

143

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141  
142  
143

. 62/2006, 65/2008, 411/2009  
. 72/2011  
. 38/2001, 18/2003, 45/2005, 123/2007



144

(CEFTA )

145

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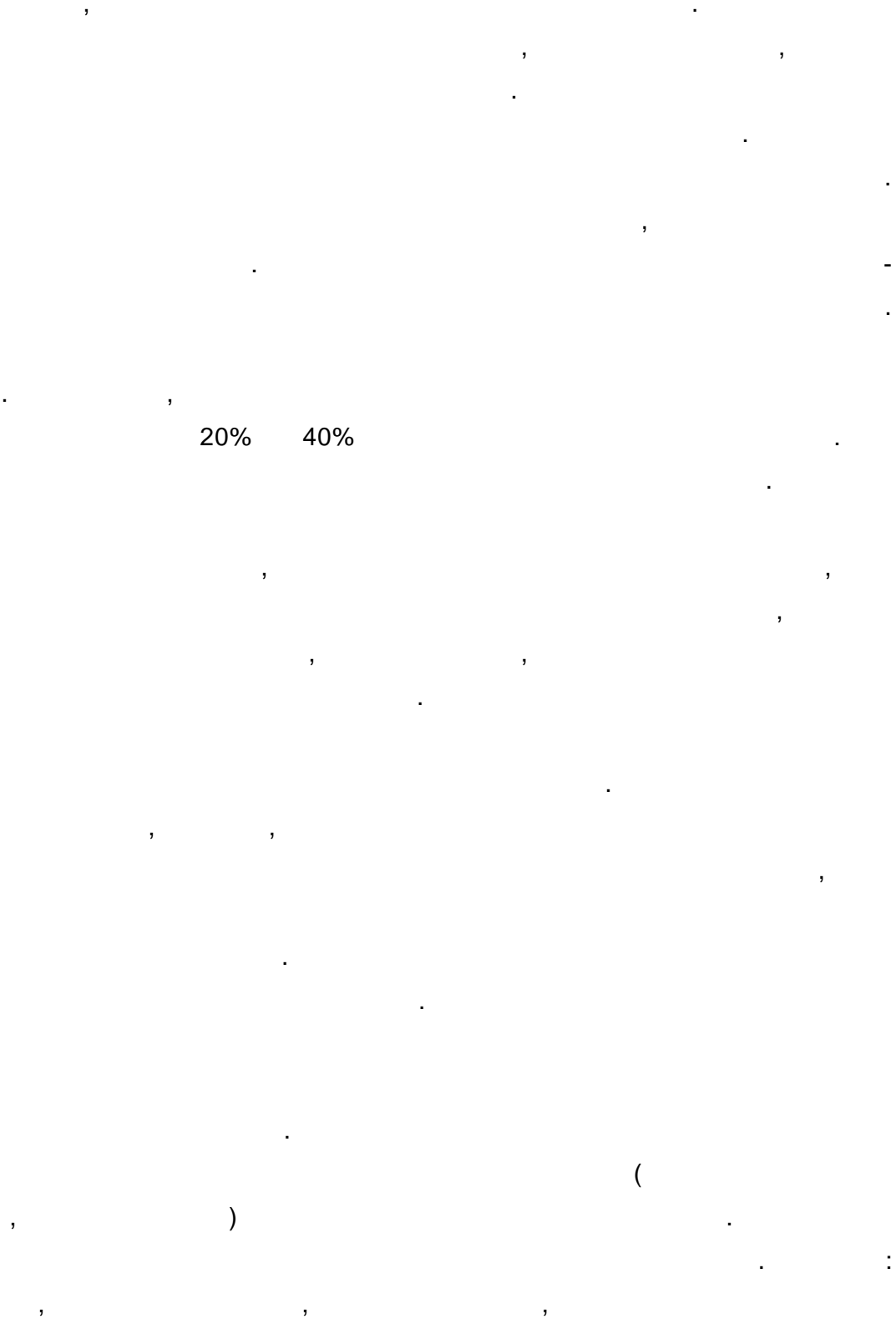
<sup>144</sup> Ceranic, S., Maletic, R., *Small and medium enterprises as development factor of agribusiness in Republic of Serbia*, Applied studies in agribusiness and commerce-APSTRACTA groin form publishing house Budapest, 2009.

[http://ageconsearch.urnn.edu/bitstream/91130/2/7\\_Maletic%20Small\\_Apstract.pdf](http://ageconsearch.urnn.edu/bitstream/91130/2/7_Maletic%20Small_Apstract.pdf)

<sup>145</sup>

2006,

, 2007,









( 3-5

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1.000 <sup>2</sup>



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146

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2005.

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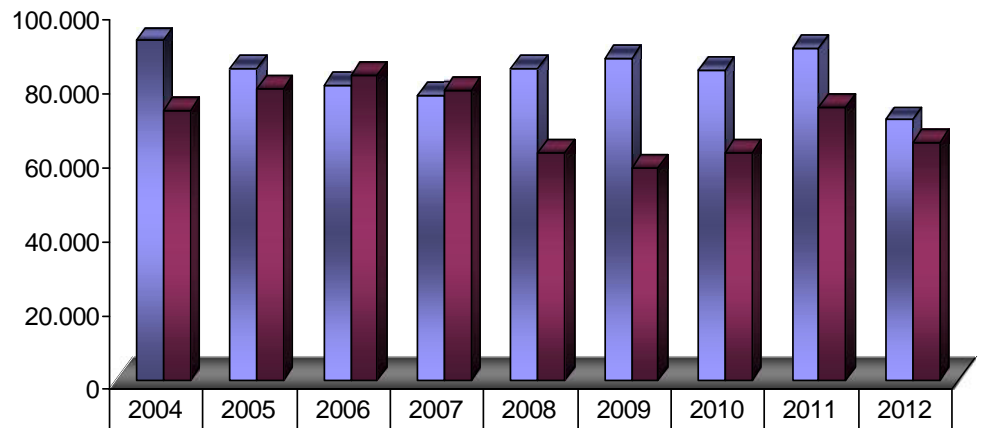
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□

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□

46 -  
2004-2012. ( )



■	<b>91.725</b>	<b>84.331</b>	<b>79.680</b>	<b>76.991</b>	<b>84.299</b>	<b>86.961</b>	<b>83.870</b>	<b>89.602</b>	<b>70.320</b>
■	72.970	78.928	82.321	78.143	61.601	57.417	61.494	73.548	64.268





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(2)

. EUREPGAP

GLOBALGAP.<sup>151</sup>

GLOBALGAP

- **ISO 9001** ( ),
- **IFS** - International Food Standard ( ),
- **BRC** - British Retail Consortium ( ),
- **Kosher** ( ),
- **Halal** ( " " , ).

## 2.1.

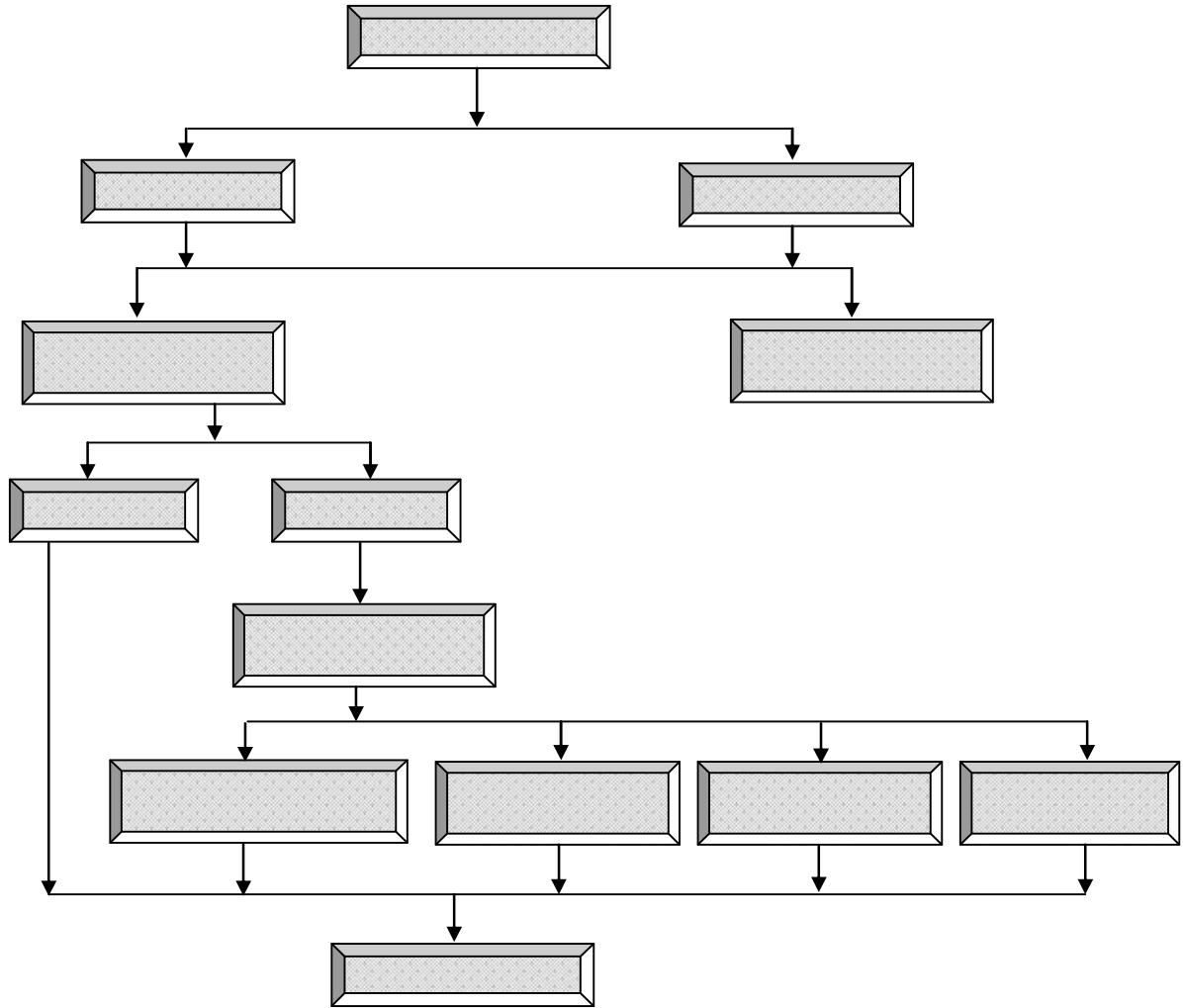
Yugent

Food doo.





14 -



:

(EUROGAPA),

( - ).

2014.

83%

17%

2014.

10.000

2.000

80  
cost benefit  
( ).

99%

Yugent Food, 1%

59 -

2013.

	/	( )	( )	/	( )
	69	80	5,520	1,75	9.660,00

:

60 -

2013.

	80
80	3.780
80	420
/	70
80	4.200
/	0,75
	4.140

:

:

$$NSV = \sum_{n=1}^{12} (Bn - Cn) / (1+r)^n$$

Cn -

Bn -

r -

12

15

12

12

55

56.

8%.<sup>152</sup>

4.140 ,

<sup>152</sup>



. , .  
Yugent Food,  
. Yugent Food  
. Yugent Food  
( , , , , ). Yugent Food

**2.2.**

Yugent Food



Food

Yugent

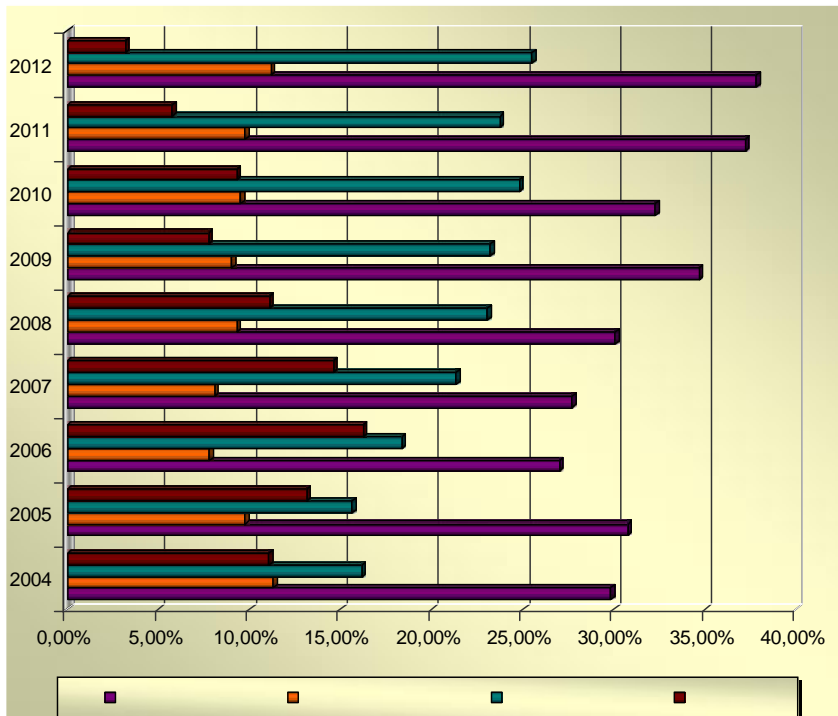
Yugent Food

Yugent

Descours

Yugent Food doo

47 -



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Yugent doo 09.03.1993. Roger Descours  
Group Yugent doo 2012. ,  
Yugent Food doo. Yugent Food doo

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:

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2002 2010. 29,7%, 20,7%,  
16,2% 8,6%.<sup>153</sup>

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. Yugent Food doo

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Yugent Food- ( 600

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Yugent Food doo . Yugent Food

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Yugent Food 1.200 1.300  
(3 : 1 ( 3), 2 ( ), 3 4)  
60 65 .  
( , , ,

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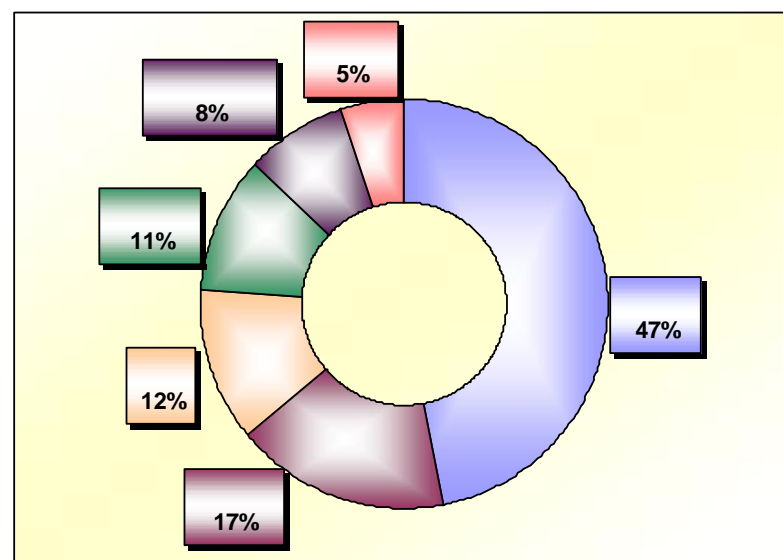
)  
(ABD Prom, MN Loznica, Stani doo, Frucom, Drenovac, Nomil, Rivamil, Jugprom,  
ITN...), 10.000 / , 4.000  
/ / , 4.000 / , 5.000 / , 400 /

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 , ...). /  
 .  
 4 : HACCP, ISO 9001,  
 IFS BRC. , Halal.  
 Yugent Food /  
 : HACCP, ISO 9001. Yugent Food  
 , / : HACCP,  
 ISO 9001, IFS BRC

( 10 14 )  
 ( 0,500 , 1  
 , 2,5 ). 30 .

48 -  
2002-2009.



:  
 2002-2009. . International Trade Centre,  
 2002-2006.

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2002. 2009. 47%

20

(

70

)

1996. 2002.

63.000

0,989 /

, 96.000

90%

: 80.000

45.000

40.000

70.000

40.000

35.000

10.000

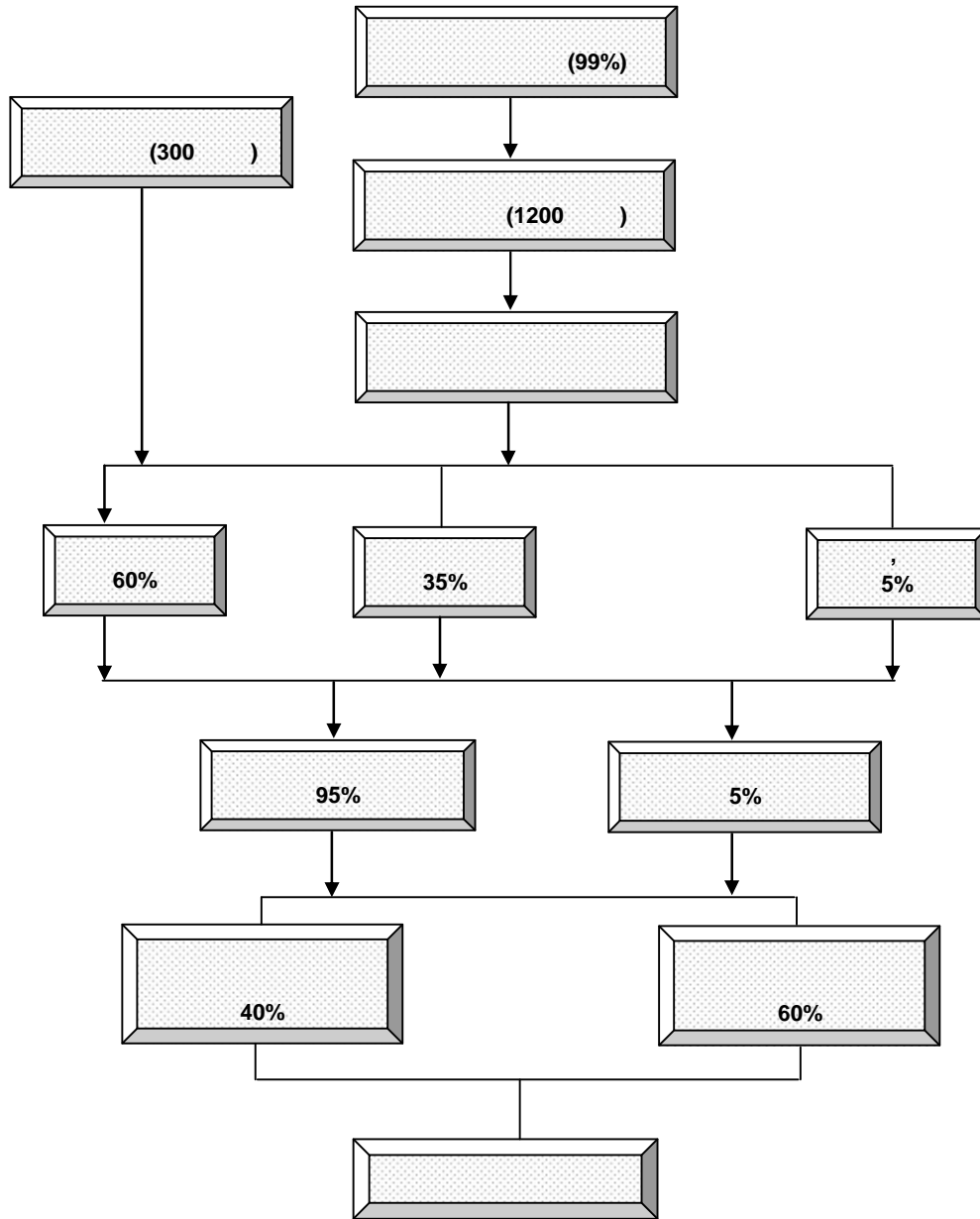
( 45,16%

).<sup>154</sup>

Yugent Food

15 -

*Yugent Food*



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Yugent Food

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Yugent Food

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( )

( , , , )

50%

( 41%)

(59%)

. Yugent Food

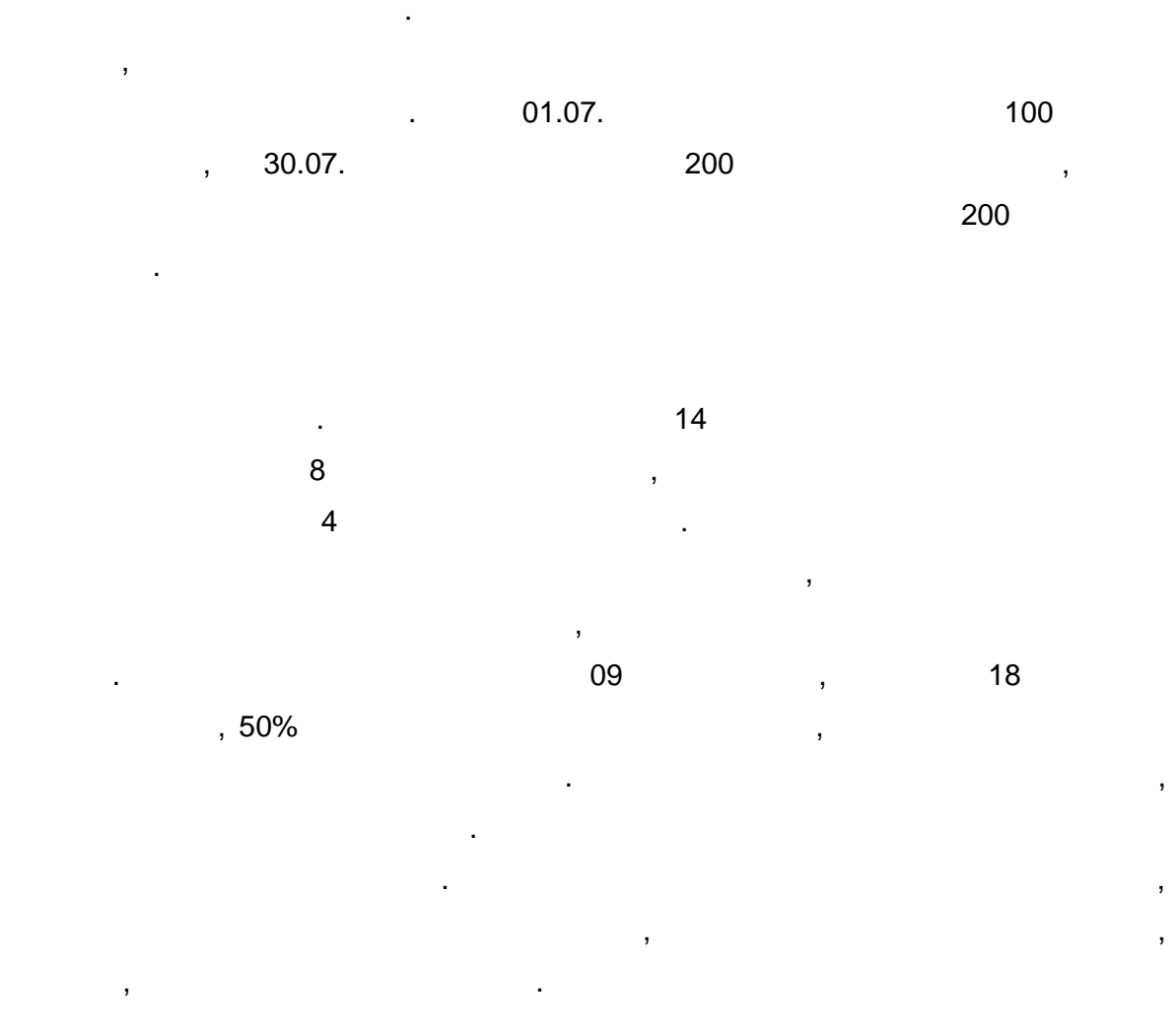
Yugent Food

851

( ),

99%

1%



Yugen Food

(Data Base Pesticides EU).

GLOBALGAP

10 . Yugen Food

22

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Roger Descours Group

40

Roger Descours Group

4

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40.000

: Vivermont Fruti d'or.

(Metro, Auchan, Leklerc,

Intermarche...)

. Yugent

Food

Roger Descours Group

Yugent Food

99%

Yugent Food

Roger

. Roger Descours Group

Yugent doo

2012.

Yugent doo,

Roger.

Yugent Food

Yugent,

17

Roger Descours Group.

Viva fruit.

155

Yugent Food doo

Yugent doo



62 –

Yugent Food doo Yugent doo

Yugent doo	Yugent Food doo
5,2-8%	1,6%
7-10%	3,5%
: HACCP, ISO 9001	: HACCP, ISO 9001, BRC, IFS
(	
)	
	,

: Yugent

63 -

% Yugent

	2008.	2009.	2010.	2011.
	98%	71%	57%	51%
	2%	29%	43%	49%

: Yugent

Yugent doo

Yugent Food doo

Yugent Food doo,

64 –

Yugent doo

	2012	2013
	95,5%	95%
	4,5%	5%

:

- Yugent

Yugent Food

Roger Descours Group.

Yugent Food :

2012. 2013.  
2012. 2013.  
45.000 2011.  
90.000  
2011. 2008.  
2007. 2008.  
2011.  
120.000 45.000 2012.  
90.000 50.000  
10.000

2011.

2012.

2012.

10.000

2013.

65 -

	2008. ( )	( )	2013. ( )
	100.000	120.000	120.000
	60.000	90.000	45.000
	50.000	120.000	90.000
	45.000	45.000	40.000
	10.000	15.000	10.000
	10.000	15.000	7.000
	5.000	30.000	20.000
	<b>280.000</b>	<b>435.000</b>	<b>332.000</b>

:

Yugent Food doo

2008.

280.000

2008.

332.000

2013.

2013.

435.000

350.000

85.000

).

(

, 10%

2012, 1,50 / 1,18 / ( 2011.  
). 1,50 /

66 – / ( )

	/	/	/	/
2013	2,23	2,55	1,90	1,30
2012	1,93	2,20	1,70	1,00
2011	1,31	1,50	1,10	0,80
2010	2,26	2,75	1,65	1,10
2009	1,89	2,30	1,40	0,90
2008	2,83	3,10	2,60	1,90

: Yugent Food

60%

, 30% 10%

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( / )

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1%

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/ 50% , 25%  
25% ( ). /  
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67 –

	( / )	( )
2013	1,75	200,00
2012	1,23	144,00
2011	0,73	75,00
2010	1,33	140,00
2009	1,12	105,00
2008	2,48	180,00

: Yugent

68 –

	/	/
2013	1,75	2,23
2012	1,23	1,93
2011	0,73	1,31
2010	1,33	2,26
2009	1,12	1,89
2008	2,48	2,83

: Yugent

Yugent Food

7t/h na 13t/h.

69 –

2009-2013.

	( / )	( / )	( / )	( / )
2009	1,12	-1,36	1,89	-0,94
2010	1,33	0,21	2,26	0,37
2011	0,73	-0,60	1,31	-0,95
2012	1,23	0,50	1,93	0,62
2013	1,75	0,52	2,23	0,30

:

Yugent Food

( , )



70 -

Yugent Food doo

			% 2013.
1.	( )	,	60%
2.	( )	,	30%
3.			5%
4.			5%

:

71 -

	2002	2003	2004	2005	2006	2007	2008	2009	2010	02-10
	1,55	1,68	1,73	1,49	1,54	1,84	2,84	2,90	2,73	<b>2,03</b>
	1,12	1,27	1,20	0,93	0,92	1,31	2,37	1,80	1,44	<b>1,37</b>
	1,29	1,43	1,38	1,12	1,19	1,54	2,43	2,26	1,95	<b>1,62</b>
	0,92	1,00	0,97	0,52	0,58	0,89	1,86	1,34	1,04	<b>1,01</b>
	1,09	1,29	1,18	1,03	1,05	1,61	2,52	2,28	2,21	<b>1,58</b>
.	0,95	0,82	0,99	0,65	0,70	1,10	1,41	1,63	1,13	<b>1,04</b>
-	0,86	0,94	0,91	0,57	0,79	1,20	2,28	1,19	1,23	<b>1,11</b>
	<b>1,21</b>	<b>1,37</b>	<b>1,36</b>	<b>1,04</b>	<b>1,13</b>	<b>1,55</b>	<b>2,57</b>	<b>2,28</b>	<b>1,99</b>	<b>1,61</b>

:

2002. 2010.

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Yugent Food

Yugent Food.

Yugent Food

Roger Descours Group  
Yugent Food

220

Yugent Food,

, Yugent Food,

IFS food

03.

2013.







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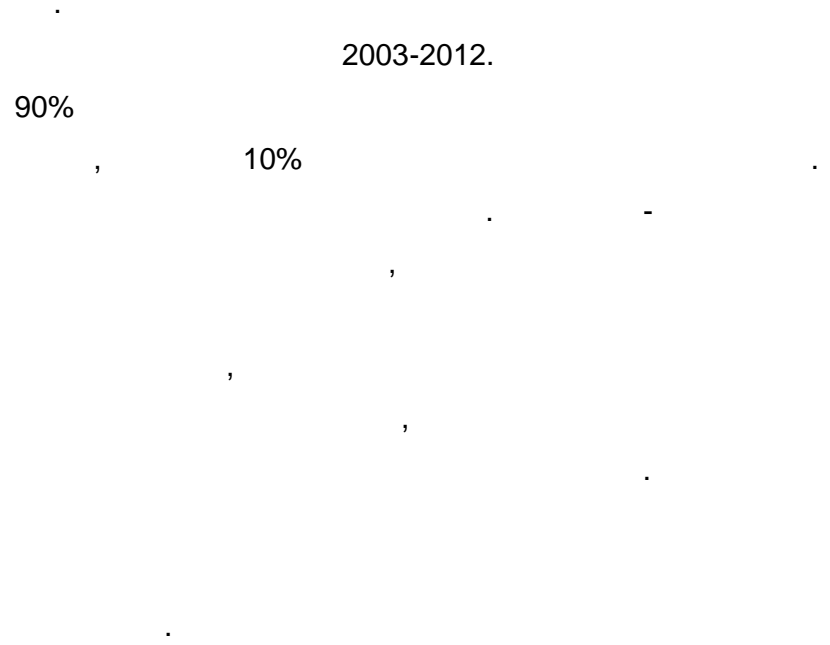
29,3%.

2012.

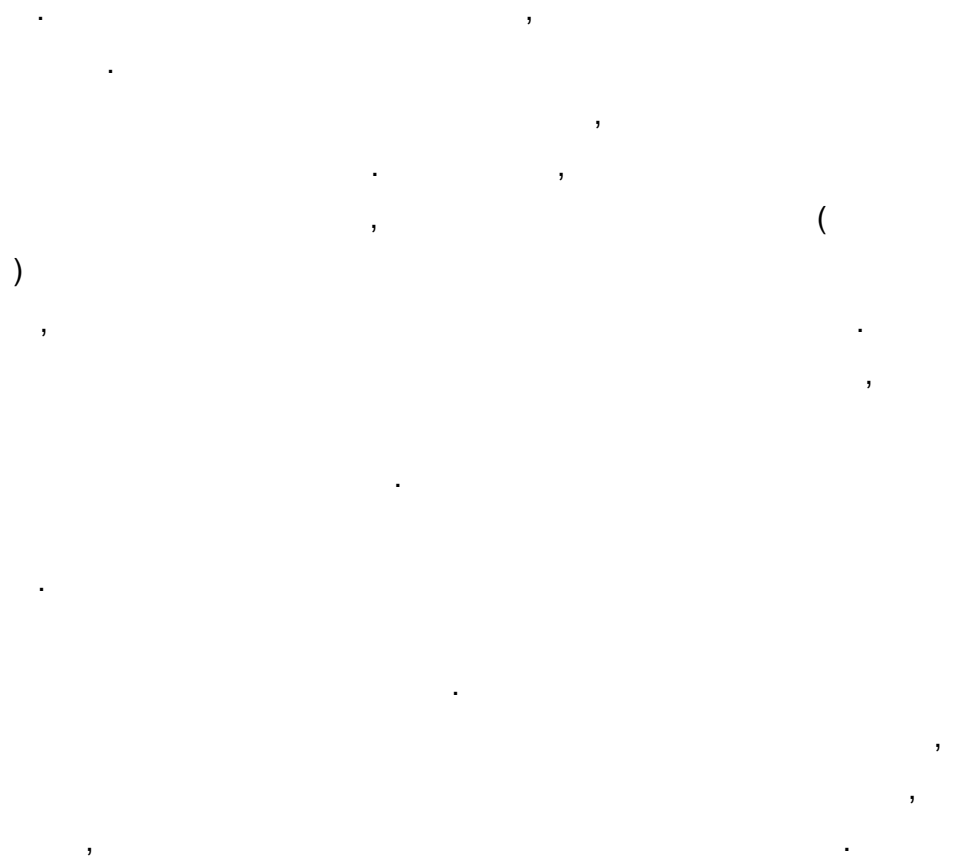
10

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7.



8.



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9.

Yugent food,  
Yugent food.  
. Cost benefit  
70 / ,  
100 / .

10.

2005-2011.



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11.

Yugent food  
Descours.

Yugent food

, Yugent food

Yugent food

7t/h na 13t/h



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