



# Bosnia Herzegovina

Target market report for the  
export of GB seed potatoes



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#### Natural Resources

About half of the area of BiH (2.6 million ha) is agricultural land comprising: 1.2 million ha of arable land, 100 000 ha of orchards and vineyards, 485 000 ha of improved grazing land and 860 000 ha of mountain pastures. Less than 20% is suited to intensive agriculture. Within the two entities of BiH, Republika Srpska has most arable land (57%), including most of the high quality land around Banja Luka, whilst the Federation has most meadow and pasture (56%). The landscape varies from high altitude central mountains to high quality arable land in the Northeast and Mediterranean vineyards in the Southwest.

#### Climate

The climate is predominantly 'moderate continental' except for the Adriatic coast and Herzegovina, which has a more Mediterranean-type climate. Natural water resources are abundant and ground water is readily accessible in many places.

#### Market for seed potatoes

In Republika Srpska the area of ware production varies between 19,000 and 22,000 hectares, which is around 5% of all arable land. The average yield is 10.2 tons per hectare.

In Federation of Bosnia and Herzegovina, the area of ware production varies between 15,000 - 17,000 hectares. The average yield is around 10.2 tons per hectare.

Even though potatoes are the third most important crop (after maize and wheat), the production of both ware and seed potato is stagnating. This is due to the lack of confidence in the quality of local production, relatively low cost of imports (Dutch companies are subsidised by their Government), lack of machinery, size of the farms and lack of financial and other support from the local Government.

Average potato consumption is 46 kg per person per year. It should be noted that whereas there is no specialised potato packer in Bosnia and Herzegovina, each company that trades in seed and ware potatoes has its own packing facilities.

## Variety List

Variety	Variety Rights	Maturity	Skin Colour	Flesh Colour	Use
Arkula	1975	First Early	Yellow	Light-yellow, buff	Table
Bintje	1910	Second Early	Yellow	Light-yellow, buff	Table. Processing. French fries. Crisps
Biranco	1979				
Bobr	1983	Late	Yellow	Light-yellow, buff	Processing. Starch
Brda (1983)	1966	Late	Yellow	Light-yellow, buff	Table
Cardinal		Second Early	Red	Light-yellow, buff	
Cleopatra	1976	First Early	Red	Light-yellow, buff	Table
Cvetnik	1964	Medium late	White	White	Table
Dalmatinka	1991	First Early	Light-yellow, buff	Light-yellow, buff	Table
Desiree	1962	Medium late	Red	Light-yellow, buff	Table
Dobrin	1964	Second Early	Yellow	Light-yellow, buff	Table. Processing. Starch
Dragaevska	1971	Early	Ochre		
Early rose	1867	Early	Light-red, pink	White	Table
Eba	1966	Second Early	Yellow	Light-yellow, buff	Processing. French fries. Dried products
Edzina	1974	Early	Light-yellow, buff	Light-yellow, buff	Table
Goran	1984	Medium late	Light-yellow, buff	Light-yellow, buff	Table
Humalda	1965	Early	Light-yellow, buff	Light-yellow-white	Table
Igor	1970	Second Early	White	White	Table
Istra	1982	Early	Light-yellow, buff	Light-yellow, buff	
Jaerla	1967	First Early	Yellow	Light-yellow-white	Table
Jaka	1979	Medium late	Red	Light-yellow, buff	Processing
Jana	1973	Second Early	White	White	Table
Janka	1976	Late	Yellow	Yellow	Table
Jelica	1971	Second Early	Light-yellow, buff	Light-yellow, buff	
Karin	1980	Early	Yellow	Yellow	Table
Kennebec	1948	Second Early	Light-yellow, buff	White	Table. Processing. French fries. Crisps
Kresnik	1989	Early	White	White	Table
Krostar	1990	Second Early	Yellow	Yellow	
Lika	1980	Medium late	Light-yellow, buff	Light-yellow-white	
Maja (SLO)					
Majestic	1911	Medium late	White	White	Table
Marijke	1967	Medium late	Yellow	Light-yellow, buff	Table
Meta	1993	Second Early	Yellow	Yellow	Table
Montana	1971	Second Early	Red	Light-yellow, buff	
Ostara	1962	Early	Ochre	Yellow	Table. Processing.

						French fries. Crisps
Planinka						
Prima	1969	First Early	Yellow	Light-yellow, buff	Table	
Ranka						
Record	1964	Medium late	Yellow	Light-yellow, buff	Processing. Crisps	
Resy	1968	Early	Yellow	Light-yellow, buff	Table	
Romano	1978	Second Early	Light-red, pink	Light-yellow-white	Table	
Russet Burbank	1874	Late	Ochre	White	Table. Processing.	French fries. Crisps
Saskia	1947	First Early	Light-ochre	Light-yellow, buff	Table	
Sirtema	1951	First Early	Light-yellow, buff	Light-yellow, buff	Table	
Stanka	1989	Early	Light-yellow, buff	Yellow		
Stirling	1991	Medium late	Yellow	Yellow	Table	
Ukama	1976	First Early	Yellow	Light-yellow, buff	Table	
Ulster Sceptre	1966	First Early	White	Light-yellow-white	Table	
Urgenta	1953	Second Early	Light-red, pink	Light-yellow, buff	Table. Processing.	French fries
Velja						
Vesna (SLO)	1960	Early	Yellow	Light-yellow, buff	Table	
Vokal	1974	Early	Yellow	Light-yellow, buff		

## Market structure

At least 60% of the population of BiH is involved in agriculture and rural based activities. There are over 500,000 small scale, low income, privately owned family farms (representing more than 95% of all production). Average farm size is 2.9 ha. Farmers are disproportionately poor and typically produce food mainly for family subsistence with just a small surplus for the market. Their productivity and incomes are low because of outdated technology, low-intensity production systems and limited capital for seeds and farm inputs. Incentives for farmers to increase marketed surplus are also weak. Investment by farmers has been limited.

Both importers and producers of agriculture produce, inputs and etc. are well aware of the need to compete on all levels to attract and keep customers. One of the pre-conditions for this is clearly effective distribution system. There is no centralised distribution system. There is no central state purchaser (but see comment on Agriculture Institute Sarajevo) and no quota system for individual buyers.

## Other Major Agricultural Products

Wheat, corn, fruits, vegetables, livestock

## Import Regulations

Seed potato export conditions for Bosnia Herzegovina are listed on the SEERAD website at:

[www.scotland.gov.uk/Topics/Agriculture/plant/18273/potatoexpconds/countriesA-B/Bosnia](http://www.scotland.gov.uk/Topics/Agriculture/plant/18273/potatoexpconds/countriesA-B/Bosnia)

Plant health regulations neither prevent nor slow down import of seed as tubers.

BiH has applied for the membership to the WTO hence no import restrictions such as quotas or prohibitively high import duties. There is no seasonality in import duties.

### **Transport**

Goods for BiH are mainly transported by road. Distance makes GB transport and delivery cost significantly higher than Dutch. GB goods could be compared with competitors only if they are to be sent by sea through the Croatian Port of Ploce, a port that has always served Bosnian commercial interests.

### **Political Considerations**

Bosnia and Herzegovina and the EU countries have signed an agreement on favourable conditions under which goods produced in BiH can be exported to the EU. For more information on this go to [www.ucta.org/dsp/eu](http://www.ucta.org/dsp/eu)  
There are no BiH/UK bilateral credit arrangements with an immediate effect on trade.

### **Technical Considerations**

Bosnia and Herzegovina is not a signatory to UPOV or any other international arrangement recognising plant breeder's rights. However they are recognised by all official institutions and reputable companies.

Institutes and most of producers regularly multiply seed in a seed classification system. All seed certification tests are carried out according to ISTA (International Seed Testing Association) rules. Small-scale farmers prefer to use their own seed rather than certified and improved varieties. Officials hope that a broad base for seed supply will be established by importing from a wider range of countries and by encouraging private sector involvement in seed import, multiplication, processing and distribution. Government's activities will be limited to seed testing, certification and quality control of domestic and imported seed and implemented through Agriculture Institutes.

It might be interested to note that after plant-breeding programmes at the Agriculture Institute in Banja Luka, Sarajevo and at the Potato Institute in Sokolac were destroyed during the war, FAO responded to this situation by providing seed, establishing a seed testing labs and introducing new laws on seed quality and plant breeders rights. Institutes were asked to undertake trials of a range of varieties supplied by FAO. Trials were done with Avalanche, Pentland Dell, Pentland Crown, Pentland Javelin, Pentland Squire, Saturna, Robinta, Windsor, Nieta, Nicola, Maris Bard, Maris Piper, Navan, Desiree, Kennebec, Carlingford, Sierra, Anna, Slaney, Burren, Record, Kingston, and Red Duke of York. High performance indicators were recorded for some (Pentland Crown, Pentland Squire, Kennebec, Carlingford and Desiree). Further information is available from Mr. Josip Cota, Agriculture Institute Sarajevo.

The country does not subscribe to the EU Common Catalogue on varieties. Bosnian market prefers varieties with white flesh, red skin and waxy texture. Processing capacities in BiH are limited hence varieties for direct human consumption are in greater demand. Deliveries of seed are required in October/November.

## **Competition**

Importing, registration and marketing of seed potatoes is done by local companies. Each distributor has the right to market one or more varieties. So there is no competition between international companies but between local importers/distributors. Whereas it is the Dutch varieties that dominate the market neither Dutch nor any other foreign company has the exclusive right to distribute controlled varieties in BiH.

Competitors are competing on product price and quality. It should be noted that local market is becoming saturated with both domestic and foreign varieties. For this reason potential importers have to be presented with a very attractive package (discounts on large quantities, early orders, repeated orders and other benefits) to win their commitment.

## **CONTACT LIST**

### **Seed importers/wholesalers**

Mr Drago Bosnjak  
Manager

#### **Sjemenarna doo**

Knespolje bb – zobilaznica

Siroki Brijeg

Phone: 00387 39 705 572

Fax: 00387 39 706 572

E-mail: [info@sjemenarna.com](mailto:info@sjemenarna.com)

Web: [www.sjemenarna.com](http://www.sjemenarna.com) (very detailed and in English)

Comment: Established in 1989. Privately owned. Employer of 35. Sjemenarna is a leading importer of seed potato. They import 6,000 tons a year or roughly 60% of total import in BiH (8-10,000 tons) or around 50% of the needs (12,000-15,000 tons). Their main varieties are: Desiree, Kennebec, Jaerla, Kondor, Amorosa, Cleopatra, and Resy. They have the licence to sell Romano, Bright, Liseta and Adora. Until now they have registered and introduced few varieties new to this market such as: Sante, Agata, Impala, Finnane, Agria, Bright with registration of Liseta, Amarosa and Junior, Adora, Arnova underway. One of the novelties of the centre will be the green phone line that will be open to all and used for provision of immediate assistance to all in need of an advice. Sjemenarna has expressed serious interest to invest in a new storage and grading and packaging facility. For this reason, they were invited to the Royal Show where that held talks with The British Potato Council, Greenvale AP plc, MBM Seed, SAC and Peal Engineering. Apart from seed potato they trade with seeds, garden tools and plant protection. Last year they have invested around KM2 million (Euro 1 million) in a new business premises in Mostar. They have established a pan-Bosnian distribution network.

Mr Sead Muratbegovic

#### **Agricom doo**

Blazuj 51

Sarajevo

Phone: 00387 33 636 101 or 636 100

Fax: 00387 33 639 210

E-mail: [ac@agricombh.com](mailto:ac@agricombh.com)

Web: [www.agricombh.com](http://www.agricombh.com) (detailed but in Bosnian)

Comment: Agricom has been in trading business for 27 years. It has been privatised recently. Employer of 15. They company trades in seeds (vegetables, grass, lucerne, flowers), agriculture tools and machinery, pesticides and food for pets. They represent Agricom, Partner, Wolf Gartnen, Gardena, Euro Machines, VMS, Fitt, Oregon etc. As to the seed potato, Agricom imports cc 2,000 tons of Kennebec, Kondor and Desiree per year. Their main import markets are the Netherlands, Denmark and Belgium. They sell thought BiH but are particularly well established in the Federation of Bosnia and Herzegovina.

Mr Mate Majic  
General Manager

**Matey djl**

Drinovci

Grude

Tel:

Fax:

GSM: 00387 63 326 905

Comment: They import Concurrent, Cleopatra, Mona Lisa, Marko Polo, Vivaldi, Red Scarlet and have applied for the registration of Bartina, Victoria Red Star, Latona. No other information was provided in time of writing.

Mr Resad Mesanovic  
Director

**Sjeme doo**

Miladije bb

Tuzla

Phone: 00387 33 284 164

Fax: 00387 33 284 151

Comment: Employer of 10. Trade in agriculture inputs, machinery and seeds. Have 3 retail outlets. Import Desiree, Jaerla, Kondor, Kennebec.

Mr Marko Ivankovic  
Manager

**Pan Agra**

Trn bb

Siroki Brijeg

Tel/fax: 00387 39 705 928

Comment: Employer of 3. They have registered Bedalin, Frieslander, Linnea. No other information was supplied in time of writing.

Mr Jasmin Cerimagic  
Director

**Poljoprema dd**

Pehlivanusa 3

Sarajevo

Phone: 00387 33 534 631

Fax: 00387 33 659 762

E-mail: [poljobih@bih.net.ba](mailto:poljobih@bih.net.ba)

Comment: Before the war Poljoprema was the leading importer of the agriculture inputs, machinery, seed and livestock in BiH. Today they work only in one part of the country where they have established good distributor channels. Last year they imported 200 tons of Kennebec, Desiree, Jaerla, Resy.

Mr Marinko Musa

Director

**ZZ Sarajevsko polje**

Bojnicka 31

Sarajevo

Phone: 00387 33 545 950

Fax: 00387 33 456 444

Comment: This co-operative acts as an extension service by providing advice to their members and other interested parties. Their core business is trade in agriculture produce and inputs. Through their retail outlets they sell around 100 tons seed of Kennebec, Jaerla and Desiree. They buy from Sjemenarna Siroki Brijed and Agricom Sarajevo. ZZ Saraj polje is a member of the Association.

**Seed growers**

Mr Vehbija Hadziabdic

Manager

**ZZ Olovo**

Branilaca grada 17

Olovo

Phone/fax: 00387 61 780 437

GSM: 00387 61 780 437

Comment: The co-operative has been in this business for 56 years. During the war, some of their machinery was destroyed. Out of 280 hectares of arable land, only 10 hectares is used for growing AA class of seed potatoes. Gross yield per hectare is 22 tons. They grow only Dutch sorts, namely Lady Claire, Lady Rosett and Saturna. None of these sorts are on the on Government's sort list hence can not be marketed locally. However this production is not illegal, as it is essential to the production of crisps at the Ferimpex, Vozuca. ZZ Olovo is a member of the Association of seed potato producers of FBiH.



Mr Edin Ciscic  
Manager  
**ZZ Poljoprodukt**  
Bosanska 42  
Bugojno  
Phone: 00387 30 215 894  
Fax: 00387 30 251 893

Comment: The Co-operative was established in 1922. Today it has 30 members. 12 hectares are currently used for the production of elite or super elite of Kennebec, Kondor and Desiree. To respond to the growing demand, Poljoprodukt intends to lease additional 13 hectares of land in the next two years. Yield varied from 14 to 20 tons per hectare. Around 30% of the production is sold as ware potato at the local green markets. Their main suppliers of virus tested stem cuttings are Sjemenarna, Siroki Brijeg and Poljoprema, Sarajevo.

Mr Ivan Damjanovic  
General Manager  
**Agraria Centar**  
Dalmatinska bb  
Glamoc  
Phone: 00387 34 272 510  
Fax: 00387 34 272 279 or 272 020  
GSM: 00387 63 359 520

Comment: Glamoc enjoys favourable soil composition and climate for production of seed potato (altitude 840 meters, average temperature of 7.3°C and 1279 mm of rain per year). Agraria has leased 80 hectares where they grow mainly Desiree. Every year they buy 50-70 tons of super elite or elite from one of local importers. They are very interested in sourcing seed directly from suppliers so as to avoid paying middlemen. The company is a member of the Association of the Seed Potatoes.

Mr Muharem Kulauzovic  
General Manager  
**Agrokrajina dd**  
Omera ef. Novljanina 1  
Bihac  
Phone/fax: 00387 37 331 601

Comment: Agrokrajina is a member of the Association. They own 20 hectares of the land where they grow Desiree. Annual yield is 20-25 tons per hectare (includes wear). They buy super elite from the Agriculture Institute Sarajevo. Employer of 40.

Mr Ramo Prcanovic  
Manager

**PD Vlastic**

Potur Mahala 5/a

Travnik

Phone/fax: 00387 30 615 945

GSM: 00387 61 793 930

Comment: This co-operative was established in 1946 and is still state owned.

Employer of 14. Member of the Association. On 28 hectares they grow Agria both as ware and seed potato on the area. Ware potato is sold to Unija Inn, a crisps producing company in Travnik. Seed is sourced from Sjemenarna Siroki Brijeg.

Mr Milorad Jagodic

Director

**Agrokombinat ad**

Boricka 3

Rogatica

Phone: 00387 58 415 030

Fax: 00387 58 415 332

Comment: Agrokombinat is in mixed (private and state) ownership with a long tradition in seed potato business. They claim to be the leading importer of seed potatoes in the Republika Srpska. The volume of import is 40-60 tons of elite of Jaerla, Desiree, Kennebec, Kondor and Resy per year. They also grow seed potato on the area of 40 hectares where they produce up to 1200 tons of original. They have a warehouse with capacity of 1200 tons.

Mr Milovan Vucic

General Manager

**Agrokrajina ad**

Vidovdanska 39

Banja Luka

Phone: 00387 51 218 266

Fax: 00387 51 218 311

E-mail: [agroka@inecco.net](mailto:agroka@inecco.net)

Comment: Agrokrajina is an importer of seeds with special emphasis on seed potato in the Rublika Srpska. They import of super elite of Desiree, Kondor, Kennebec from the Netherlands. Annual volume of import is 50 tons. Agrokrajina also grows seed potato on 30-50 hectares whose altitude is higher than 900 m. They are interested in varieties used for production of crisps but also in high quality seed.

Mr Dragan Petrovic

Director

**Potato Institute Sokolac**

Sokolac

Phone: 00387 57 448 708 or 448 709

Fax: 00387 57 448 709

Comment: see below

### **Potato processors**

Mr Ismet Mujanovic  
Manager

**Ferimpex doo**

Branilaca grada bb

Zavidovici

Phone/fax: 00387 32 874 505 or 874 605

GSM: 00387 61 175

E-mail: [ferimpex@goldy-chips.com](mailto:ferimpex@goldy-chips.com)

Comment: The company was established in 2000 with capacity to process 2,000-3,000 tons of potato per year. At this moment their production rate is 90%. Their main suppliers are Deutch companies and co-operatives in Olovo, Visoko and Fojnica. Mr Mujanovic did not want to disclose the varieties.

Ms Ajdina Hasanovic

Sales Manager

**DD Majevisa**

PJ Corn Flips

Hazima Vikala bb

Srebrenik

Phone: 00387 35 640 008

Fax: 00387 33 644 040

Comment: The company has been involved with production of snacks since 1980. The production was interrupted during the war. It has been privatised recently. Their current capacity is 700 tons per year. Next year they plan to invest in a warehouse. PJ Corn Flips intends to reduce its dependence on foreign companies by having a fixed contract with local producers of potato. The varieties used are: Bimonda, Aminka, Curage, Sirtema, Saskia, Agria, Nika, Lady Claire, Lady Rosetta. Their main suppliers are from Slovenia, Austria, Croatia.

Mr Senad Kaimovic

Director

**Unija inn doo**

Basbunar 1

Travnik

Tel/fax: 00387 30 511 663

E-mail: [uinn1@bih.net.ba](mailto:uinn1@bih.net.ba)

Comment: Unija inn is a snack producing company. Employer of 15. The level of production is 60%. Their production is limited by the size of the market and the fact that large multinational companies such as Kelly's dominate the market. Their main product is a potato crisp. They have signed a long term contract with PD Vlastic on supply of Agria. Last year Unija inn bought 300 tones of potatoes.

Mr Mirko Subotic  
Director  
**Marbo doo**  
Sportski centar bb  
Laktasi  
Phone/fax: 00387 51 833 215 or 833 276 or 833 485  
E-mail: [marbo@blic.net](mailto:marbo@blic.net)  
Web site: [www.marbo.ba](http://www.marbo.ba)  
Comment: The company did not want to disclose any information.

### Useful Contacts

**Ministry of Agriculture, Forests and Water Resources Ministry of Agriculture,  
Waters and Forestry**  
Mehmeda Spahe Vuka Karadzica 4  
Sarajevo Banja Luka  
Federation of Bosnia and Herzegovina Republika Srpska  
Phone: 00 387 33 443 338 Phone: 00 387 51 331 634  
Fax: 00 387 33 663 659 Fax: 00 387 33 51 331 631  
WEB: [www.fbihvlada.gov.ba](http://www.fbihvlada.gov.ba)

Mr Mile Dardic  
Potato Expert  
**Agriculture Institute Banja Luka**  
Knjaza Milosa 17  
Banja Luka  
Phone: 00 387 51 303 112  
Fax: 00 387 51 312 792  
E-mail: [sjem.lab@pins.bl.ac.yu](mailto:sjem.lab@pins.bl.ac.yu)

Mr Josip Cota  
Potato Expert  
**Agriculture Institute Sarajevo**  
Butmirska cesta 40  
Sarajevo  
Phone: 00 387 33 623 203  
Fax: 00 387 33 407 601  
E-mail: [poljoprivredniinstitut@hotmail.com](mailto:poljoprivredniinstitut@hotmail.com)  
Comment: Very important institution, provide advisory and other technical service, have well equipped laboratory for seed testing, often subcontracted by the Government to purchase seeds and other agricultural inputs. Mr Cota is a member of the Committee for registration of varieties.

Mr Dragan Petrovic

Director

**Potato Institute Sokolac**

Sokolac

Phone: 00387 57 448 708 or 448 709

Fax: 00387 57 448 709

Comment: Established in 1978, owned by the state, recognised as an institution of strategic importance to the RS Government (even though this recognition is not securing adequate financial support). Engaged in development of production of virus free basic seed potato based on multiplication of flesh. This method is applied on Desiree, Jaerla and Ostara. The institute is also involved in production of virus free mini tubers for local market. Their current production level is 100 000 mini tubers. The institute is interested in developing co-operation with similar institutions in Britain. This co-operation would be based on production of the sorts that are of interest to the local market.

Mr Mirsad Hubanic

President

**Udruzenje proizvodaca i preradivaca krompira iz FBiH**

**(Association of potato producers and processors of Federation of BiH)**

ZZ Agropodrinje

Seada Sofovica Sofe 20

Gorazde

Phone/fax: 00387 38 224 528

GSM: 00387 61 156 007

Comment: Established last year, has 11 members, recognised by the Federation Ministry of Agriculture.