



COMPETITIVENESS OF ALBANIAN AGRICULTURE

VALUE CHAIN ANALYSIS FOR FRUITS AND VEGETABLES SUB-SECTOR IN FIER REGION

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Albania-Hawaii Higher Education and Economic Development Project

Content

- Problem and Objectives
- Methodology
- Results and Discussion
 - Drivers Evaluation
 - Drivers Ranking
- Conclusions and recommendations



Problem and Objectives

Problem: Competitiveness of sub-sector is extremely low

In 2007, export to import ratio for fruits and vegetables was 1 to 19 (1:21 for fruits and 1:13 for vegetables)

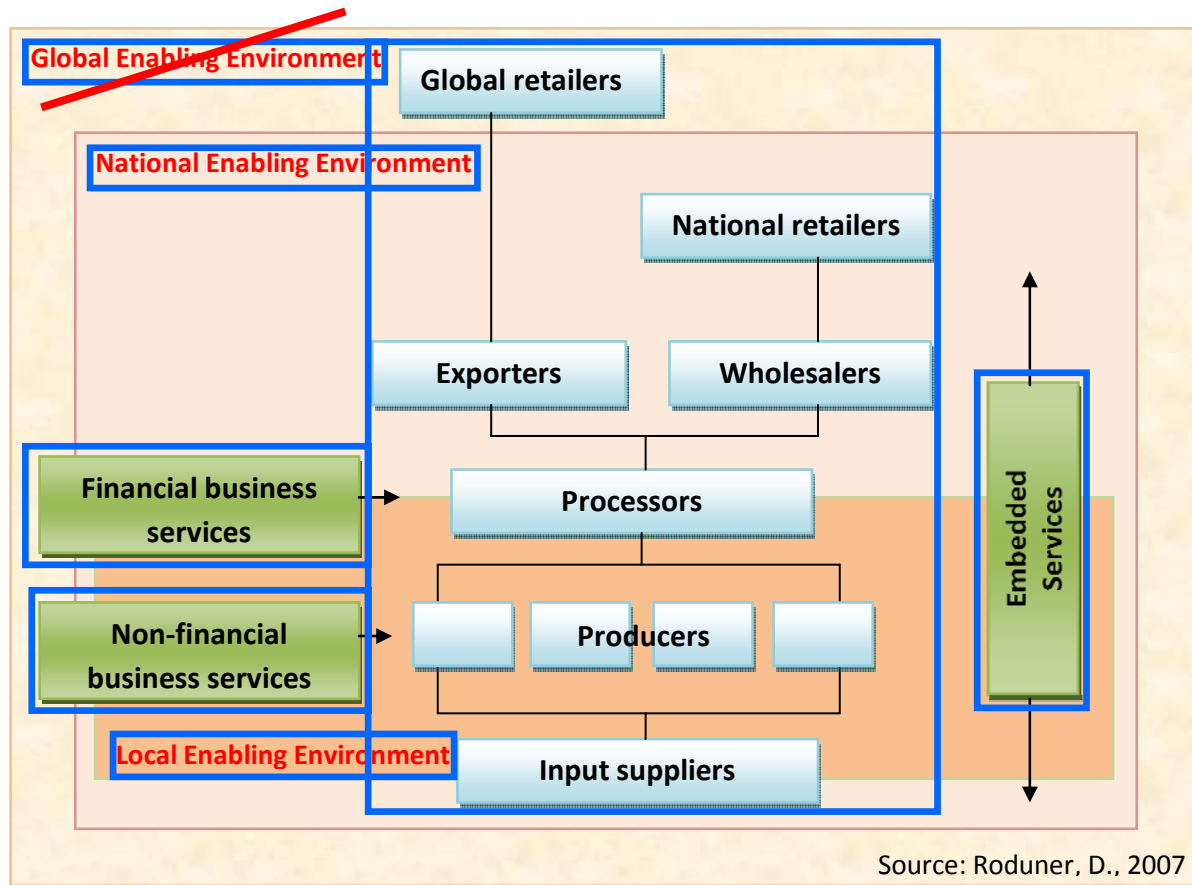
Objectives

1. Identifying competitiveness drivers for fruits and vegetables sub-sector and their evaluation
2. Ranking competitiveness drivers for fruits and vegetables sub-sector



Methodology

Value chain analysis



Methodology

Data & procedures

□ First objective: Drivers evaluation

Data

- Survey of 2006: 60 actors in vegetables value chain
- Focused group in 2006: actors in vegetables value chain
- In depth interviews in 2008: 20 actors in fruits and vegetables value chain

Procedure

- Likert measure of 5 scales

□ Second objective: Drivers' ranking

Information

- Expert assessment

Procedure

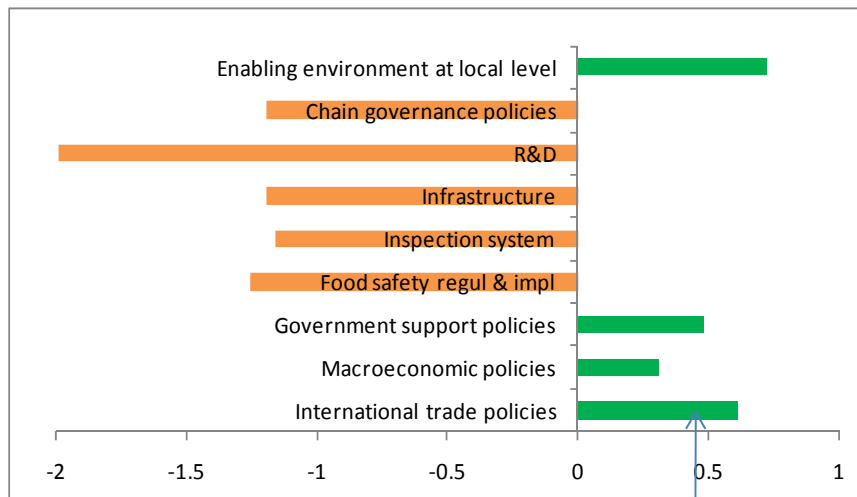
- Expert choice



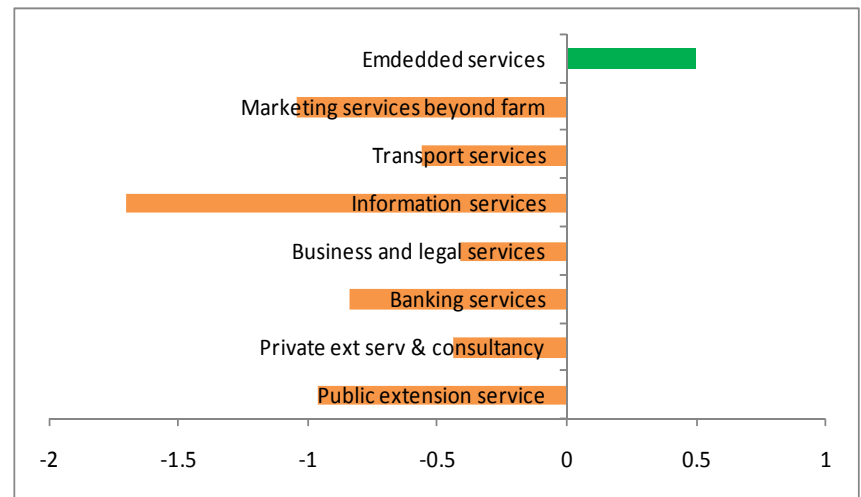
Results & discussion:

Drivers evaluation

Enabling environment



Supporting services



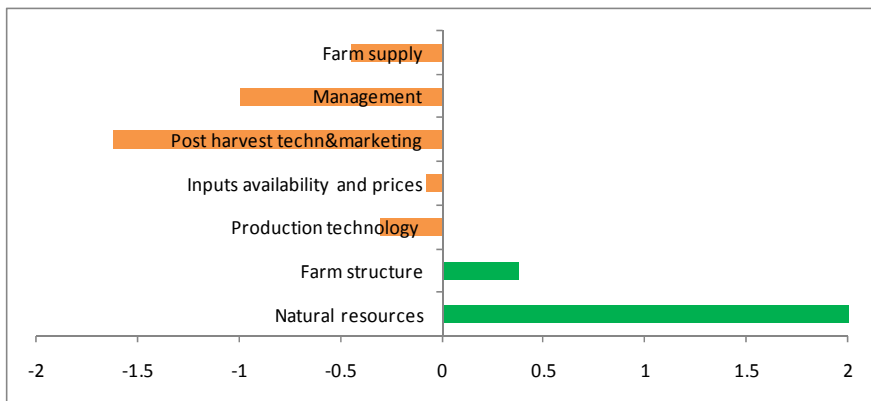
Green color:
favorable driver



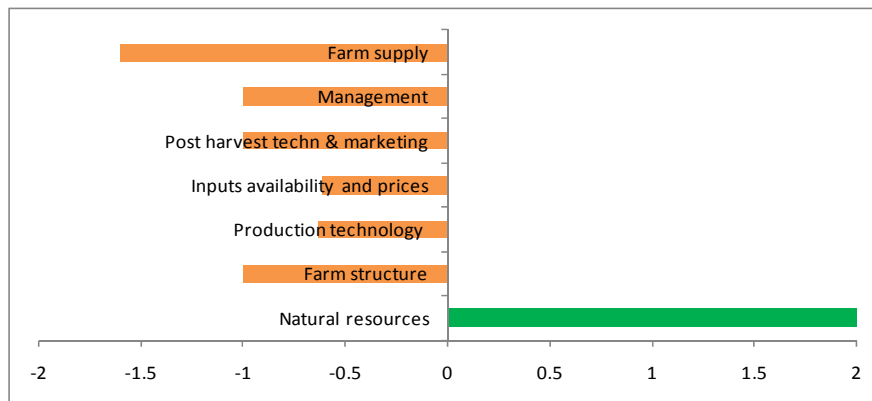
Results & discussion:

Drivers evaluation

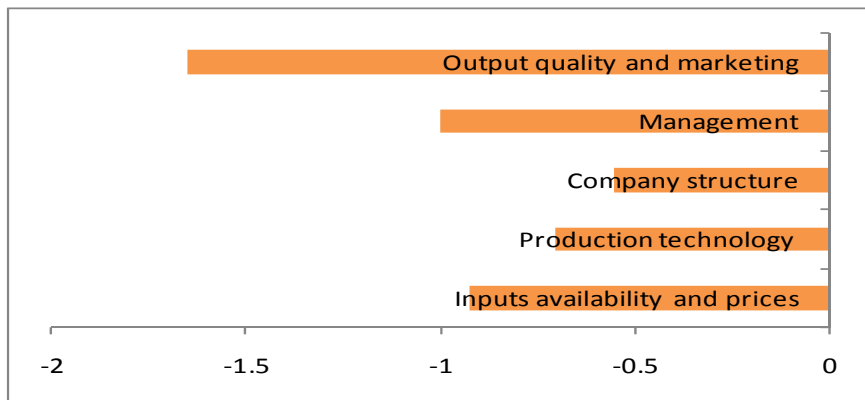
Farmers: fresh produce



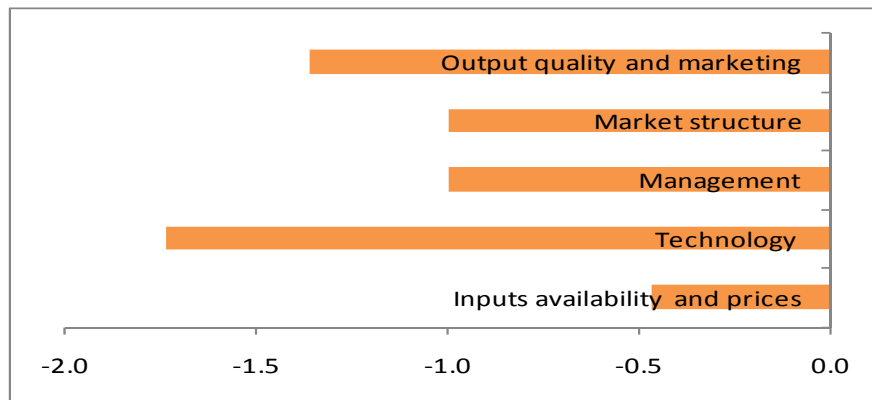
Farmers: processing



Processors

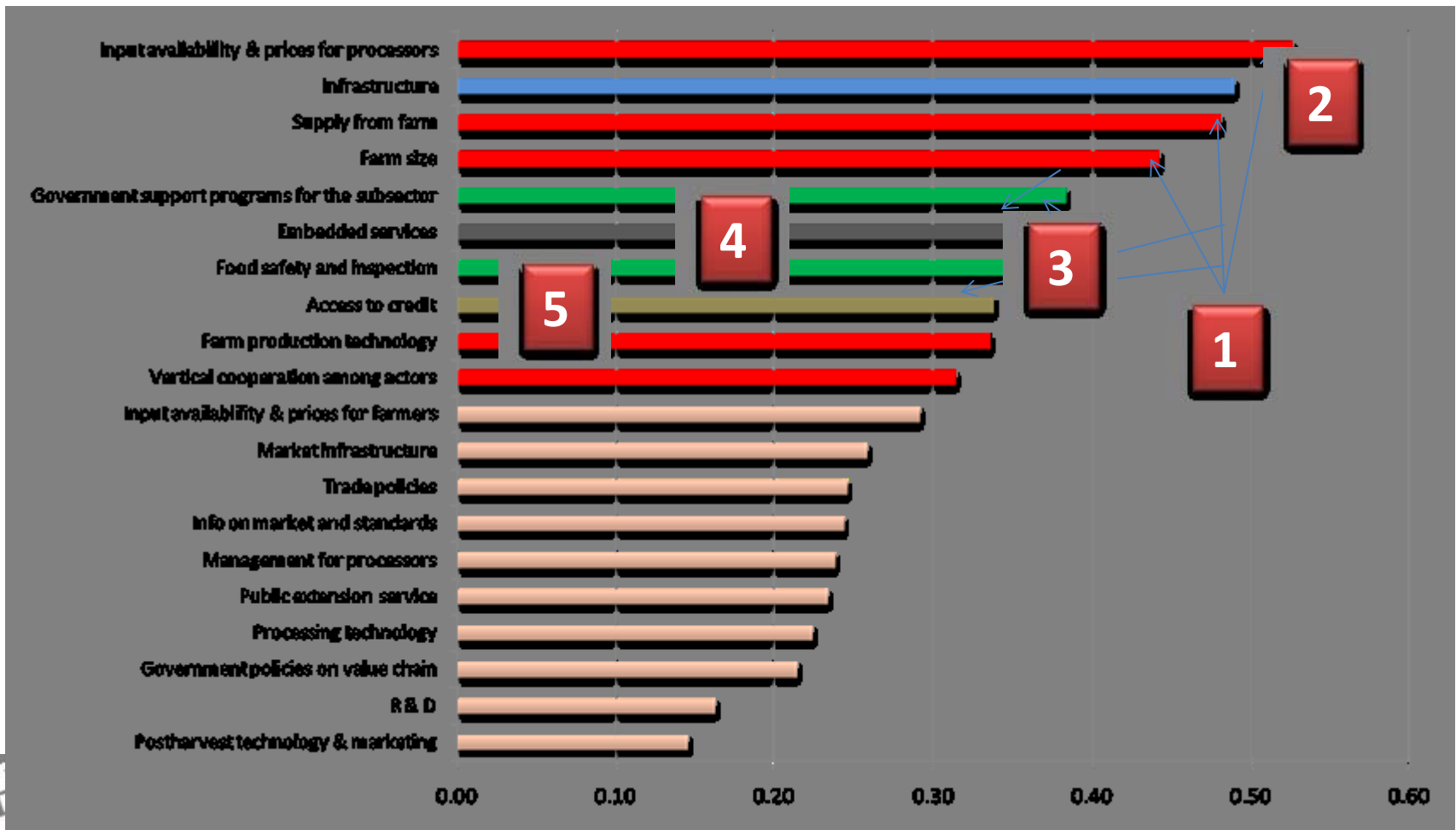


Distributors



Results & discussion:

Drivers ranking: processing industry



Conclusions & recommendations

Conclusions

- Unsuitable **supply from farm** in terms of cultivars, small size of supply, and its high price represent the biggest problem for processing industry
- Basic challenge in terms of competitiveness of fruits and vegetables in Fier region is insufficient capacity (and low performance) of **private actors**
- **Chain governance** is weak or simply missing
- **Enabling environment and supporting services** are often inadequate.

Recommendations

- Government should address **the problem of supply from farm to processing industry**.
- Government and business should **partner** for improving technology, food safety, management and marketing at farm and processing level
- **Support to consolidated actors**, who can improve the whole chain competitiveness should be considered
- Government should address **chain governance** improvement.





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THANK YOU !

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