

**Agricultural policy, food security practice and  
foreign trade with BiH in the  
Republic of Serbia**

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## 1. Agricultural policy in Serbia

The Ministry of Agriculture, Forestry and Water Management is responsible for the creation and implementation of agricultural policy.

The strategic framework for agricultural and rural development in the Republic of Serbia is defined by the Strategy for Agriculture and Rural Development of the Republic of Serbia for the period 2014-2024. The legislative framework is based on the Law on Incentives in Agriculture and Rural Development. The law prescribes minimum amounts of incentives, while the financial framework for the implementation of incentives is regulated by the Regulation on the distribution of incentives in agriculture and rural development, which allocates budget funds intended for agriculture for each current year. A closer definition of each type of incentive is contained in the by-laws (Annex 1. Review of the 51st valid legal act relevant to incentives in agriculture).

According to the Law, incentives are funds provided in the budget of the Republic of Serbia, as well as funds provided from other sources, which are allocated to agricultural farms and other persons. Agricultural farms and family farms registered in the Register of Agricultural Farms (RPG) are entitled to incentives. Data from the Register of Incentives are public. According to the Law, the types of incentives are: 1. direct payments; 2. incentives for rural development measures; 3. special incentives; 4. credit support.

IPARD incentives are only partly financed from the republic budget (a quarter of the total volume of funds), and mostly from EU financial aid funds.

### 1.1. Direct payments

The term direct payments means:

- premiums - monetary amounts paid to agricultural producers for delivered agricultural products, paid quarterly for cow, sheep and goat raw milk, delivered in the previous quarter;
- incentives for production - monetary amounts paid per unit of measure for a sown crop, perennial crop, or livestock of the appropriate type (for high-quality breeding cattle, for fattening steers, lambs, kids and fattening pigs, suckling cows, beehives and edible fish);
- recourses - sums of money that are paid in a certain percentage or absolute amount for the purchased amount of inputs for agricultural production (fuel, fertilizer, seeds and other reproductive material) and storage costs in public warehouses.

Direct payments for 2022 are paid in maximum amounts, namely for:

1. premium for milk in the amount of 10 dinars (RSD) per liter of milk – €0,085 (1€ = 117,32 RSD per day 30.11.2022.);
2. basic incentives for plant production in the amount of 6,000 dinars per hectare (€51,14);
3. incentives for quality breeding dairy cows in the amount of 25,000 dinars per head (€213,09);
4. incentives for quality breeding fattening cows and bulls in the amount of 40,000 dinars per head (€340,95);
5. incentives for quality breeding sheep and rams, goats and goats in the amount of 7,000 dinars per head (€59,67);

6. incentives for quality breeding sows and boars in the amount of 15,000 dinars per head (€127,86);
7. incentives for parent hens of heavy type in the amount of 60 dinars per head (€0,51);
8. incentives for parent hens of light type in the amount of 100 dinars per head (€0,85);
9. incentives for parent turkeys in the amount of 300 dinars per head (€2,56);
10. incentives for quality carp breeding queens in the amount of 500 dinars per head (€4,26);
11. incentives for quality breeding queens of trout fish in the amount of 300 dinars per head (€2,56);
12. incentives for beef fattening in the amount of 15,000 dinars per head for fattening (€127,86);
13. incentives for fattening lambs in the amount of 2,000 dinars per head for fattening (€17,05);
14. incentives for fattening kids in the amount of 2,000 dinars per head for fattening (€17,05);
15. incentives for fattening pigs in the amount of 1,000 dinars per fattening head (€8,52);
16. incentives for lactating cows in the amount of 40,000 dinars per head (€340,95);
17. incentives for bee hives in the amount of 800 dinars per hive (€6,82);
18. incentives for the production of edible fish in the amount of 10 dinars per kilogram of fish produced (€0,085);
19. incentives for cows for raising calves for fattening in the amount of 20,000 dinars per head (€170,47);
20. recourse for storage costs in public warehouses in the amount of 40% of storage costs;
21. production-related incentives in the amount of 7,000 dinars per hectare (€59,67);
22. subsidy for fertilizer, fuel and seeds in the amount of 2,000 dinars per hectare (€17,05).

**The premium for milk** is 10 dinars per liter of milk (€0,085) and is regulated by the Rulebook on the conditions, method and form of requests for exercising the right to the premium for milk. It is paid quarterly for cow, sheep and goat raw milk, delivered in the previous quarter, with the prescribed minimum quantity of milk delivered, and taking into account specific criteria for areas with difficult working conditions in agriculture. The amount of milk premium is calculated per liter of milk delivered to dairies. The milk supplier must deliver at least 3,000 liters of cow's milk per quarter, or at least 1,500 liters of cow's milk per quarter if the production is carried out in an area with difficult working conditions in agriculture, but no more than 3,000,000 liters of milk per quarter. In order to realize the right to the premium, the milk supplier must hand over the milk to a legal entity or entrepreneur dealing with milk processing, which is in the records of the milk processor. The request for the premium is submitted by the milk supplier to the Directorate for Agrarian Payments directly or through a legal entity or entrepreneur.

**Basic incentives in plant production** amount to 6,000 dinars per hectare (€51,14) and are regulated by the Rulebook on the method of exercising the right to basic incentives in plant production and the request form for the realization of those incentives. The measure has been implemented since 2012, and the number of beneficiaries who are entitled to the basic incentive for plant production is constantly increasing. Incentives for production are paid per unit of measure for the sown crop, i.e. for perennial crops. The right to use belongs to a legal entity, an entrepreneur and a natural person, and they are realized for registered and sown, i.e. planted areas under the appropriate culture up to a maximum of 20 ha and only for arable agricultural land. In addition to the basic incentives, the law provides for production-related incentives that are realized on the area of plant production with a minimum yield per hectare for a certain type of plant production and certain crops of agricultural products, but they are not provided for either by decree or by a special rulebook.

**Incentives in animal husbandry** can be obtained for: quality breeding dairy cows, quality breeding fattening cows and bulls, cows for raising calves for fattening, suckling cows, quality breeding sheep and rams, goats and goats, quality breeding sows and boars, fattening steers, fattening lambs, fattening kids, fattening pigs, beehives, parent hens of heavy type, parent hens of light type, parent turkeys, quality breeding queens of carp fish, quality breeding queens of trout fish, production of edible fish. Incentives can be obtained by a legal entity, an entrepreneur and a natural person - the owner of a commercial family farm under certain conditions:

- incentives for high-quality breeding animals are regulated by the Rulebook on the conditions and methods of exercising the right to incentives in animal husbandry for high-quality breeding animals. The Republic of Serbia has favorable natural conditions for the development of animal husbandry, given that it has over 650,000 ha of high-quality permanent grasslands and significant unused capacities for housing and breeding livestock. However, despite the existence of favorable conditions, this branch of agriculture has been recording negative trends for the third decade - only during the last ten years, the number of conditional heads per hectare of used agricultural area decreased from 0.60 to 0.53. Due to the still small number of quality breeding heads, as well as the insufficient quality level of livestock products (milk, meat, etc.) and lower production characteristics compared to countries with developed livestock breeding and EU member countries, the uncompetitiveness of our production compared to production in those countries. In order to increase the number of quality breeding heads, it is necessary to encourage the breeding of quality breeding heads, which improves the racial composition of the herd and creates conditions for efficient production. The long-term realization of incentives for high-quality breeding cows significantly increased the production per cow, which is extremely important, bearing in mind that the number of cattle has been decreasing over the years. The right to incentives is realized for at least: 1) three quality breeding dairy cows, and a maximum of 300 quality breeding dairy cows, and for areas with difficult working conditions in agriculture for at least two, and a maximum of 300 quality breeding dairy cows; 2) three quality breeding fat cows or bulls; 3) 30 quality breeding ewes or rams, and for areas with difficult working conditions in agriculture for at least ten quality breeding ewes or rams; 4) ten quality breeding goats or goats, and for areas with difficult working conditions in agriculture for at least five quality breeding goats or goats; 5) ten quality breeding sows or boars. For heavy-type parent hens, light-type parent hens, parent turkeys, quality breeding queens of carp fish and quality breeding queens of trout fish, the right is exercised regardless of the number of quality breeding heads. Incentives are available in the following amounts:

- for dairy cows in the amount of 25,000 dinars per head (€213,09);
- for fattening cows and bulls in the amount of 40,000 dinars per head (€340,95);
- for breeding sheep and rams, goats and goats in the amount of 7,000 dinars per head (€59,67);
- for breeding sows and boars in the amount of 15,000 dinars per head (€127,86);
- for parent hens of heavy type in the amount of 60 dinars per head (€0,51);
- for parent hens of light type in the amount of 100 dinars per head (€0,85);
- for parent turkeys in the amount of 300 din per head (€2,56);
- for carp queens in the amount of 500 dinars per head (€4,26);
- for trout queens in the amount of 300 dinars per head (€2,56 €).

- incentives for fattening are regulated by the Regulation on the use of incentives for beef fattening and the Rulebook on conditions and methods of exercising the right to incentives in

animal husbandry for fattening beef, fattening pigs, fattening lambs and fattening kids. Meat production in Serbia in the last few years has been facing numerous problems (decline in the production of certain types of meat and reduction in the number of heads). In recent years, the export of beef meat has recorded a decline in value, while it is necessary to improve the marketing of pork meat, as well as to create conditions for the marketing of lamb and goat meat, both on the domestic and foreign markets. The measure is designed to motivate producers to improve their own production and competitiveness, as well as to improve cooperation with the meat processing industry, thus ensuring the placement of their products as products of a higher degree of processing. The incentive is calculated per fattening head, handed over to the processor (slaughterhouse), or placed through export to the foreign market. The basic prerequisite for the realization of rights based on incentives is the registration of the agricultural holding, as well as the marking of animals. The incentive is approved only for heads for fattening, which are delivered to the slaughterhouse or intended for export, with the existence of lower limits for production, which refers to the fattening of pigs, lambs and kids. These measures affect the reduction of the volume of slaughter in conditions that do not meet hygienic and sanitary regulations, the increase in the number of animals in livestock, the improvement of the quality of livestock products and the consolidation of farms engaged in livestock production. The right to incentives can be realized for at least three heads of fattening beef per submitted request, with the fact that for fattening pigs it can be for a maximum of 5,000 heads per registered agricultural holding during the year.

Incentives are available in the following amounts:

- for fattening bulls in the amount of 15,000 dinars per head for fattening (€127,86);
- for fattening lambs in the amount of 2,000 dinars per head for fattening (€17,05);
- for fattening kids in the amount of 2,000 dinars per head for fattening (€17,05);
- for fattening pigs in the amount of 1,000 dinars per head for fattening (€8,52).

- incentives for cows for raising calves for fattening amount to 20,000 dinars per head (€170,47) and are regulated by the Rulebook on the conditions and methods of exercising the right to incentives in animal husbandry for cows for raising calves for fattening. One of the reasons for the introduction of this measure is to encourage producers to engage in the production of beef, which is in demand on the international market. The measure is being introduced for the first time since 2017, and they are paid per cow that belongs to the calf breeding herd. The expected effect of the implementation of incentives is the improvement of meat production per breeding head, as well as the preservation of the number of breeding heads. The incentive is realized for calving cows, once a year for the same herd, based on the request submitted to the Directorate for Agrarian Payments.

- incentives for lactating cows amount to 40,000 dinars per head (€340,95) and are regulated by the Rulebook on conditions and methods of exercising the right to incentives in animal husbandry for lactating cows. Incentives for lactating cows are paid per head, and for fattening cows of pure breed and crossbreeds of fattening breeds, which belong to the herd intended for rearing calves for meat production. The measure is sustainable, given that its implementation encourages the improvement of the development of specialized fattening breeds and the sustainable use of meadows and pastures. The expected effect of the implementation of incentives for lactating cows is to improve the productivity of meat production per breeding head. The incentive is provided for lactating cows over 24 months of age, belonging to purebred fattening cows, namely: Hereford, Charolais, Limousin, Aberdeen Angus, Shorthorn, Belgian Blue, Chiaina, Romagna, Marquis and Blond Aquitaine or crossbreeds of the mentioned fattening breeds, which they belong to a herd intended for



raising calves for meat production. The condition for exercising the right to incentives is that a person has at least two head of lactating cows.

- incentives for the production of edible fish amount to 10 dinars per kg (€0,085) and are regulated by the Rulebook on how to exercise the right to incentives in animal husbandry for the production of edible fish. The idea of introducing incentives for the production of edible fish is to motivate producers to engage in this branch in areas where there are conditions for its development. The measure was established in 2013 in order to introduce a larger volume of produced fish into the legal flow of traffic, considering that producers deliver fish to processors, as well as its placement on the domestic market, while reducing dependence on the import of fishery products. From the producer's point of view, this measure should lead to an increase in profits, given that the cost price is reduced by the amount of the incentive. The incentive is calculated and paid for the produced edible fish, delivered to the processor, based on the request submitted to the competent authority.

-incentives for bees amount to 800 dinars per beehive (€6,82) and are regulated by the Rulebook on conditions and methods of exercising the right to incentives in animal husbandry per beehive. Beekeeping is currently in an unsatisfactory position, despite the fact that natural resources indicate enormous potential and opportunities for its development. The effect of the incentive measure per beehive is reflected in the increase in honey production and its placement on the domestic and international markets. The measure was established in 2013 to improve the placement of beekeeping products, strengthen market chains in this sector, improve the quality of beekeeping products and other branches of agricultural production, which depend on the role of bees as pollinators, and increase the number of hives. The right to incentives in animal husbandry per hive of bees is exercised by a legal entity, an entrepreneur and a natural person - the holder of a commercial family farm that has at least 20 hives of bees, and a maximum of 1,000.

#### -regressions for fertilizer and storage costs

The law provides for rebates for purchased fuel, fertilizer, seeds and other reproductive material, as well as for storage costs in public warehouses. Reimbursements for storage costs in public warehouses are paid in the minimum amount of 40% of storage costs. In addition, production-related incentives of 7,000 dinars per hectare (€59,67) for fertilizer are foreseen. Reimbursement for fertilizer, fuel and seeds amounts to 2,000 dinars per hectare (€17,05) for 2022.

Reimbursement for storage costs is regulated by the Rulebook on conditions, methods and forms of requests for exercising the right to reimbursement for the costs of storing agricultural products in public warehouses for the following agricultural products:

- wheat, namely: A-1, A-2 and A-3 classes;
- corn, namely: A and B classes;
- raspberry, namely: roland, semi-block, block and semolina categories;
- blackberry, namely: jam, half block, block and semolina categories;
- cherries, namely: pitted and pitted categories.

The right to recourse is exercised by a legal entity, an entrepreneur and a natural person - the holder of a commercial family agricultural farm for a full month from the date of issue of the commodity note, and for a maximum of six months from the date of issue of the commodity note in accordance with the law regulating public warehouses for agricultural products, in the amount of 40% of storage costs for a maximum of 2,000 tons of stored wheat and/or corn, i.e. for a maximum of 20 tons of stored raspberries and/or blackberries and/or cherries. Additional

conditions are that he has declared the area under agricultural products, as well as that he has picked up agricultural products from the public warehouse in a period that cannot be longer than one year before submitting the Request for exercising the right to recourse.

## 1.2. Measures of rural development

According to the Law, incentives for rural development measures are carried out as compensation for part of the costs in a certain percentage of the value of each type of measure and are set at a minimum amount of 30% of the total value of each type of measure, ie 45% for areas with difficult working conditions in agriculture. Incentives for rural development measures include support for programs related to: 1. improving competitiveness; 2. preservation and improvement of the environment and natural resources; 3. diversification of income and improvement of the quality of life in rural areas; 4. preparation and implementation of local rural development strategies; 5. improvement of the system of creation and transfer of knowledge.

The budget of the ministry increases from year to year with the legal obligation that it must not be less than 5% of the total budget of the Republic of Serbia (RS). After the last rebalancing in November, the budget was increased by 16.5 billion dinars, i.e. €14,064,098.19 (€1 = RSD 117.32 as of November 30, 2022). The total amount of the budget is RSD 78.5 billion or €669,110,126.15, which represents 5.3% of the RS budget. An additional RSD 7.7 billion (€65,632,458.23) has been provided for direct payments related to the milk premium, basic incentives for plant production and animal husbandry, and for rural development measures RSD 2.87 billion (€24,463 007.16). In the budget for 2022, RSD 39,911,686,000, or €340,195,073.30, was allocated for direct payments, and in the budget for 2023, RSD 46,933,161,000, or €400,043,990.79 (an increase of 17.59%). The total budget for 2023 will amount to RSD 79,704,221,000 (€679,374,580.72).

## 2. The legal framework of cooperation between the RS and BIH

Trade takes place on preferential terms, in accordance with the CEFTA Free Trade Agreement, which agreed on mutual complete liberalization of trade.

### Other valid agreements:

The agreement on veterinary cooperation, which was signed between the Government of the RS and the Council of Ministers of Bosnia and Herzegovina, on November 1, 2010. years;

Agreement between the Ministry of Agriculture, Trade, Forestry and Water Management of the RS and the Ministry of Agriculture, Forestry and Water Management of the Republic of Srpska on technical cooperation in the veterinary and phytosanitary field, food safety and animal feed, signed on 21.3. in 2012;

Protocol between the Ministry of Agriculture, Forestry and Water Management of the RS and the Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina on mutual recognition and acceptance of documents issued by accredited laboratories for food and animal feed of vegetable and mixed origin, signed on 04/06/2012. years;

Protocol between the Ministry of Agriculture, Trade, Forestry and Water Management of the RS and the Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina on cooperation in the field of plant health protection, signed on April 6, 2012. years;

Protocol on professional-technical cooperation in the field of agriculture, food industry, rural development, veterinary medicine, forestry and water management between the Ministry of Agriculture, Forestry and Water Management of the RS and the Ministry of Agriculture, Forestry and Water Management of the Republic of Srpska, signed on 10.7.2013. years;

Agreement on cooperation on integral water management in the lower reaches of the Drina River between the Ministry of Agriculture, Forestry and Water Management of the RS and the Ministry of Agriculture, Forestry and Water Management of the Republic of Srpska, signed on September 20, 2014. years;

Memorandum on technical cooperation in the field of agriculture between the Ministry of Agriculture and Environmental Protection of the RS and the Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina, signed on September 20, 2016. years;

Memorandum of understanding between the Ministry of Agriculture, Forestry and Water Management of the RS and the Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina on cooperation in the implementation of the project "Management of the Drina Basin in the Western Balkans", signed on 19 April 2017. years;

Memorandum of understanding on cooperation related to the regular functioning and maintenance of the flood warning and flood forecasting system in the Sava river basin, signed on 1.7.2020. years.

So far, 58 international veterinary certificates (certificates) for the export of products from the RS and 46 certificates for the import into the RS have been agreed.

The Veterinary Administration issued a regulation on the termination of the mandatory vaccination of domestic pigs against classical swine fever on December 15, 2019. Accordingly, the competent authority of BIH was informed that pigs, pig meat and meat products can be imported from BIH to the RS, under the conditions that are in force until 1 January 2021. years. After this date, it is possible to import animals that have not been vaccinated, as well as meat and products obtained from non-vaccinated animals.

On September 7, 2022. the measure that limited the export of cattle to the territory of Bosnia and Herzegovina, which was introduced due to the appearance of lumpy skin disease in cattle and the vaccination that was carried out in the territory of the RS against the said disease, ended.

On the basis of a bilateral agreement between the two competent authorities, an additional guarantee for plague of small ruminants (PPR) was drawn up, which ensured the smooth export of sheep and goats for production and slaughter in the territory of Bosnia and Herzegovina.

Cooperation in the phytosanitary area takes place on the basis of the Protocol between the Ministry of Agriculture, Trade, Forestry and Water Management of the RS and the Ministry of Foreign Trade and Economic Relations of Bosnia and Herzegovina on cooperation in the field of plant health protection, signed on April 6, 2012. year in order to facilitate and speed up the transportation of consignments of plants, and therefore increase the trade exchange of plants and plant products. The protocol envisages the improvement of the cooperation of bodies responsible for the phytosanitary field, in the field of exchange of legal regulations, encouragement of joint education of experts, exchange of experiences and scientific achievements.

RS and Bosnia and Herzegovina have been participating in the European cooperative program for plant genetic resources for many years, and the joint realization of a regional project called "Regional Network of Southeast Europe for Plant Genetic Resources".

Cooperation in the field of registration of varieties of agricultural plants is based on the principles of the convention of the international organization UPOV, in which both countries are members. In accordance with the legal norms, BIH accepts the results of tests of varieties carried out in the RS. Experts suggest bilateral cooperation and exchange of experiences in the field of DUS and VCU testing of varieties of agricultural plants through regional and European programs, as well as the performance of "ring tests" in both countries, which would provide more information on the production characteristics of varieties and agricultural producers.

The improvement of bilateral interstate cooperation in the field of water is of great importance, bearing in mind the specific problems in the basins of the common rivers, Drina and Sava (multipurpose use of water, protection against the harmful effects of water, protection of water quality, the issue of production, sediment yield and exploitation of sand and gravel and etc.).

The RS and Bosnia and Herzegovina cooperate in the work of the International Commission for the Protection of the Danube River and the International Commission for the Sava River Basin within the multilateral framework. This is important for the RS because the sources for water supply to Sremska Mitrovica, Šabac, Belgrade and other places are located on the banks of the Sava, which is why it is necessary to preserve the quality of the water. Cooperation is also necessary for flood protection. For the entire region, activities on the restoration of navigation on the Sava River as well as issues of multi-purpose water use (energy, water supply, irrigation) are significant.

In this sense, it is recommended to initiate negotiations on the Agreement between the Government of the RS and the Council of Ministers of Bosnia and Herzegovina on cooperation in the field of sustainable management of transboundary waters.

## 3. Chosen practices in food security policy of Serbia

### 3.1. Republic Directorate for Commodity Reserves (RDCR)

The Republic Directorate for Commodity Reserves was established as a special organization that performs professional and state administration tasks related to: the organization of the commodity reserve system; education, accommodation, preservation and renewal of the republic's commodity reserves; determining the volume, structure and quality of the balance of commodity reserves; managing the flow of quantities with the aim of maintaining reserves at the necessary minimum level; construction of storage capacity for the needs of the republic's commodity reserves; material-financial and record-keeping operations with commodity reserves, as well as other tasks specified by law.

Article 4 of the Law on Commodity Reserves states that commodity reserves are public property and that they are made up of goods necessary to ensure supply and stability, namely:

- agricultural and food products and material for reproduction;
- medicines, medical devices and equipment for health and veterinary institutions and other forms of health services;
- oil and oil derivatives;
- equipment and goods for the needs of railways, post, telecommunications, energy and defense systems;
- other products of importance for ensuring supply and stability.

Commodity reserves can include cash in domestic and foreign currency, as well as securities.

Article 8 of the Law on Commodity Reserves stipulates that the **Annual program of commodity reserves** shall be adopted for the period of one calendar year, after the entry into force of the law regulating the annual budget of the Republic of Serbia.

The annual program determines:

- 1) type, name, quantity, i.e. volume and value of goods that are formed and renewed as commodity reserves, given on loan or lease;
- 2) territorial distribution of commodity reserves;
- 3) storage space capacity for accommodation and storage of goods reserves;
- 4) conditions under which certain types and quantities of commodity reserves are entrusted for long-term storage and renewal;
- 5) investment needs;
- 6) the required amount of funds for the implementation of the Annual Program.

The Annual program also determines the conditions under which the Directorate can contract the production and delivery of certain types of goods in order to fill the commodity reserves, the minimum commodity reserves, part of the commodity reserves which, depending on the needs, will be formed in cash, in domestic and foreign currency and securities, as well as the types and quantities of goods in commodity reserves that are necessary for the functioning of the defense system.

The annual program and the financial plan for its implementation are adopted by the Government, at the proposal of the Directorate. The Directorate submits an annual report on the operation of commodity reserves to the Government.

At the proposal of the RDCR, the Government of the RS adopted several conclusions in the previous three years:

### **In 2019**

- Natural exchange of mercantile corn for fattening cattle;
- Natural exchange of mercantile corn for fattening beef (4 times);
- Lending of commercial corn;
- Free delivery of sugar.

### **In 2020**

- Natural exchange of mercantile corn for fattening beef (4 times).

### **In 2021**

- Taking over fattening pigs from breeders, for processing into canned meat.

### **In 2022**

- Non-refundable delivery of up to 15,000 tons of mercantile corn in order to provide assistance to dairy cow breeders. **The aid included 109,98 6 dairy cows.**

The Government's conclusion specifies the criteria that must be met by bidders and beneficiaries of each measure individually. For example, in the conclusion from 2019, the Government gave consent to RDCR to carry out a natural exchange of up to 17,000 tons of mercantile corn from the 2018 crop for fattening beef with primary producers. Parity in natural exchange is 17 kg of mercantile corn for 1 kg of fattened beef. The maximum amount of mercantile corn per primary producer is up to 170,000 kg.

In the same year, the Government gave consent to the RDCR to carry out a natural exchange of up to 12,000 tons of mercantile corn in 2018 and 2019 for fattening beef with primary producers. In addition to the already mentioned conditions, a list of slaughterhouses that will perform slaughtering and processing into permanent meat preserves - beef goulash and beef cutlet in cans (cans of 0.3/0.4 kg, i.e. 0.15 kg) has been established. Slaughterhouses are credited with 3.5% of the incoming weight in the slaughterhouse depot in the name of the service performed. Parities in processing are determined:

- 100,000 kg of fattened beef for 45,000 kg of beef stew (2.22);
- 100,000 kg of fattened beef for 40,000 kg of beef cutlet (2.5).

In the conclusion from 2021, the Government gave consent to RDCR to take up to 1,500,000 kg of fattening pigs from breeders for processing into canned meat (meat cuts and liver pâté) at parity:

- 4 kg of fattened pigs for 1 kg of pork cutlet,
- 2.75 kg of fattening pigs for 1 kg of pork liver pate, etc.

In the conclusion from 2022, the following were specified:

- the quality of commercial corn,
- conditions that must be met by a breeder of dairy cows (from 1 to 50 dairy cows),
- amount of mercantile corn per dairy cow (240 kg), etc.

### 3.2. System of public warehouses

The Law on Public Warehouses for Agricultural Products entered into force in 2009, and together with later adopted by-laws, provides for the licensing of public warehouses, whereby only warehouses that meet the criteria of successful financial operations and high technical-technological performance of agricultural product storage are included in the system, and as such guarantee the high quality of their services. Inclusion in the System of public warehouses for agricultural products is based on a voluntary basis.

Instead of a receipt, public warehouses issue a commodity record (securities) to the depositor of agricultural products, that is, to agricultural producers, thus enabling them to dispose of and trade stored goods, without physical contact with them.

A commodity bill can be used as a pledge to obtain short-term loans in commercial banks or traded as a commodity security, especially when it comes to grains and oilseeds. In this way, agricultural producers are not forced to sell their product after the harvest, when the price is usually the lowest, but they satisfy their short-term needs with a loan based on a commodity bill, and they sell the goods during the year when the price is in most cases more favorable for them.

The Ministry of Agriculture, Forestry and Water Management, in accordance with the possibilities allowed by the agricultural budget, provided support for the establishment and maintenance of the System of Public Warehouses. By storing goods in the Public Storage System, agricultural producers can exercise the right to recover part (40%) of the storage costs. This type of support to agricultural producers has been in place since 2010. In addition to this measure of support, registered agricultural holdings dealing with storage can exercise the right to reimbursement for investments in storage capacities and the purchase of equipment for facilities (40% of the investment value).

In addition to this support for registered agricultural farms, in the first years of the establishment of the system, the Compensation Fund of the Republic of Serbia was given funds for the establishment and start of work. The Compensation Fund of the Republic of Serbia has the status of a legal entity, and was established in accordance with the Law on Public Warehouses for Agricultural Products (*"Official Gazette of the RS"*, number 41/09) for the purpose of paying damages based on commodity records that occurred in connection with the storage of agricultural products.

The system of public warehouses is not functioning today. There are currently no public repositories. Lack of information about the advantages of storage in public warehouses was the biggest problem in the development of this system. Also, the remoteness of public warehouses and the lack of storage capacities of this type in all parts of Serbia. Entry into the System requires certain costs for warehouses, which may be the reason for their lack of interest. Licensing and registration in the Registry of Public Warehouses do not represent large expenses, but during the course of business, the public warehouse has a financial obligation to the Compensation Fund on a monthly basis, the amount of which, depending on the capacity and whether it is grain crops or fruit, can be significant.

### 3.3. Measures adopted during the crisis caused by the corona virus pandemic and the conflict in Ukraine

The first anti-crisis measures were adopted on March 14, 2020. year, the day before the introduction of the state of emergency due to the corona virus pandemic. The Government of Serbia adopted the **Decision on limiting the price of basic foodstuffs, protective equipment and disinfectants**, and the list includes 36 categories of products, in order to prevent disturbances on the market, so that they do not exceed the price level of those products on March 5 this year.

The price restriction applies for a period of 30 days for the following goods:

- Wheat flour;
- Bread;
- Edible sunflower oil;
- White sugar;
- Salt;
- Water;
- Vegetables and fruits;
- Pasta;
- Fresh meat;
- Meat products;
- Fish;
- Thermally processed cow's milk (pasteurized and sterilized);
- Milk powder;
- Yogurt;
- Chicken eggs;
- Baby food;
- Alcohol.

Registered agricultural farms were paid the amount of basic incentives for plant production for 2020 in the amount of 5,200 dinars per hectare (€44.32) intended to compensate for costs in primary plant production (pesticides, protective agents, etc.). Agricultural producers were not obliged to apply for the right to basic incentives in plant production in 2020, because the cross-section of the situation from 2019 was taken.

From 22.4.2022. 2.6 billion dinars (€22,161,609.27) were available to agricultural producers as part of the Program of Economic Measures to Support the Economy. Holders of commercial family agricultural holdings, which are registered in the Register of Agricultural Holdings (RPG) and are in active status, had the right to receive financial assistance. Owners of marked and registered beehives, be they owners or members of an agricultural holding, are also entitled to financial assistance, provided they are 70 years of age or older in 2020.

The amount of one-time aid is determined in absolute monetary amount per unit of registered area, i.e. per head of livestock or number of beehives:

- 25 dinars (€0.21) per square meter for vegetable growers who have greenhouses or greenhouses, and a maximum of 90,000 dinars (€767.13),
- per head of cow 3,000 dinars (€25.57), and a maximum of 30,000 dinars (€255.7),
- 500 dinars (€4.26) per head of sheep or goat, and a maximum of 20,000 (€170.47), and
- 800 dinars (€6.82) per hive of bees, and a maximum of 20,000 dinars (€170.47).



The regulation on financial support to agricultural holdings through subsidizing part of the interest eased access to and use of loans. A natural person and an entrepreneur can exercise the right to credit support provided that the total amount of the loan is up to six million dinars (€51,142.18), or up to 18 million dinars (€153,426.53) for a legal entity. The amount of the loan for liquidity is up to three million dinars (€25,571.09). Farmers will be able to take a loan of up to three million dinars (€25,571.09) - for three years with **an interest rate of one percent and a grace period of up to one year**. The funds for the implementation of this regulation have been determined in the total amount of 1,450,000,000 dinars (€12,359,359.02).

Regular incentive measures for investments in the physical property of the agricultural holding for the purchase of new machines and equipment for the improvement of the primary production of plant crops are available to registered agricultural holdings, which are paid in the maximum amount of 50% of the value of each type of rural development measure, i.e. in the maximum amount of 65% of the value of a certain type of rural development measure in an area with difficult working conditions in agriculture, namely:

- incentives for investments for the acquisition of new machines and equipment for the primary production of cereals, industrial and fodder plants,
- incentives for investments for the purchase of new machines and equipment for irrigation of vegetable crops.

New in 2020 were incentives for investments for electrification of fields, and the conditions for realization are prescribed by the Rulebook on incentives for investments in physical property of agricultural holdings for electrification of fields (published in the *"Official Gazette of RS"*, number 25 of March 12, 2020). Incentives are set at a percentage of 90% of the value of the eligible investment in accordance with the law governing incentives in agriculture and rural development, or a special regulation governing the distribution of incentives in agriculture and rural development.

On March 14, 2020, the **Government of the RS temporarily banned the export of basic products essential** for the population for 30 days in order to prevent a critical shortage of these products, i.e. to mitigate the consequences of the shortage caused by the population's need for increased supply caused by the spread of the infectious disease COVID-19 caused by the virus SARS-CoV-2.

Tariff code	Appointment
1206009900	Sunflower seeds, in the shell
1512119100	Sunflower oil, raw
1703900000	Sugar beet molasses
2102103100	Baking yeast, dry
2102103900	Baking yeast, others
1701991000	White sugar
2207100000	Alcohol
2207200000	
2208909100	
2208909900	

In April of the same year, the export of **mercantile corn** of the 2019 harvest (tariff code 1005 90 00 00) **was also limited, up to 400,000 tons**.

On **June 30, 2022**, the Government of the Republic of Serbia adopted the **Regulation on limiting the price of basic foodstuffs**, which limits the price of: flour type 400 smooth, in packages of up to five kilograms, including five kilograms; type 500, in packaging up to five kilograms, including five kilograms; as well as the price of edible sunflower oil in a one-liter package, so that it does not exceed the level of regular prices on November 15, 2021.

In the name of supporting the milling industry, in addition to the possibility of purchasing 15,000 tons of wheat from the RDCR at a more favorable price, the Government of the RS paid 353 million dinars (€3.008.864,64) as price compensation due to the Regulation on Limiting the Prices of Flour T-400 and T-500 for the Period II-VII of 2022.

At the same session, the Government of the RS approved that the Republic Directorate for Commodity Reserves announce a tender for the purchase of 131,000 tons of wheat of domestic origin, harvested in 2022 at a price of 40 dinars per kilogram (€0.34) including VAT. As pointed out in the government's conclusion, the minimum quantity purchased from a family farm is 10 tons, while the minimum amount of wheat purchased from a business entity is 100 tons. The novelty compared to previous tenders is that, in addition to agricultural holdings, wheat can also be purchased by legal entities, if they have the appropriate storage capacity.

The originally adopted decrees were harmonized with the state of the market or with the requirements of professional associations, the Chamber of Commerce, and competent ministries. That's right, 11.8.2022. In the Decision on Amendments to the Decision on the Temporary Restriction of the Export of Basic Agricultural and Food Products Essential for the Population from June 18, 2022, a quantitative restriction on the export of wheat and corn was introduced on a quarterly level (July, August, September), instead of a monthly one, as was foreseen until then. **The three-month quotas are at the level of 500,000 tons for wheat and 500,000 tons for corn.** If the economic entity does not export at least 80% of the allowed amount in the three-month period for which the permit was issued, or exceeds the allowed amount, the ministry responsible for agriculture will not decide on the request of that economic entity for the next three-month period.

The Government of the Republic of Serbia made a decision to lift the ban on the export of all types of oil after a complete review of the state of stocks, as well as record areas under sunflower planting.

At the session, the Decision on the temporary reduction of excise duties on certain oil derivatives by 10 percent was also adopted.

By the decree of the Serbian Government dated August 9 of the current year, the **retail price of T-500 flour bread is limited to 53.50 dinars (€0.46)**, while the maximum producer price is limited to 45.88 dinars (€0.39). Amendments to the Regulation on mandatory production and trade of bread made from T-500 flour (*Official Gazette of the RS No. 87/22, 97/22*) which were published in *Official Gazette RS Gazette 111/22* of October 7 of that year extended the validity of the Regulation from 60 to 120 days. The highest total margin rate, calculated on the net invoice price of bread minus rebates and discounts, amounts to a maximum of 6%. It is also stipulated that the term of payment to the bread producer cannot be longer than 20 days from the day of receipt of the invoice for the delivered bread. Bread manufacturers are obliged to produce and market bread made from flour "T-500" in the amount of at least 30% of the daily production of all types of bread.

The Government of the RS adopted the Decision on the **temporary ban on the export of milk and milk products**, which is effective from September 7, 2022. The mentioned export ban is introduced for:

milk from the following customs tariff codes:

- 0401 10 90 00 Milk and cream, unconcentrated and without added sugar or other sweetening matter - other
- 0401 20 19 00 with fat content over 1%, but not over 6% by mass - other,
- 0401 20 99 00 with fat content over 3% - other,
- 0401 40 90 00 with a fat content of more than 6%, but not more than 10% by mass - other,
- 0401 50 19 00 with fat content over 10%, by weight - other,

butter in packaging with a net mass of over 1 kg from the following tariff codes of the Customs Tariff:

- 0405 10 19 00, Maslac - other
- 0405 10 30 00, recombined butter
- 0405 10 50 00 whey butter
- 405 10 90 00 other.

Exceptionally, the temporary ban on the export of the mentioned products **does not apply to goods exported to the Republic of North Macedonia and the Republic of Albania**. In addition, the restriction does not apply to the export of goods for which an export declaration was accepted by the customs authority before the entry into force of this decision.

The Government of Serbia has extended the temporary ban on the export of milk and milk products until the end of 2022, with the exception of exports to North Macedonia and Albania.

In addition, starting from September 7, 2022. year, the amendment to the Regulation on limiting the price of basic foodstuffs is in effect, which now stipulates that the margin calculated on the net invoice price of all types of UHT milk, minus rebates and discounts from suppliers, amounts to a maximum of 5%. Also, starting from September 7, 2022. year, **the maximum retail price of UHT milk with 2.8% milk fat in a one-liter package may not exceed 128.99 dinars (€1.10)**.

At the session of 1.12. In 2022, the Government of the Republic of Serbia adopted the Regulation on Limiting the Price of Basic Foodstuffs, by which the price of:

- edible sunflower oil must not exceed 219.99 dinars per liter (€1.88),
- white crystal sugar 114.99 dinars per kilogram (€0.98) and
- flour type T-400 in the amount of RSD 84.7 per kilogram (€0.72).

The prices of these foods are unchanged compared to the previously adopted regulation, and will be valid until February 28, 2023.

The previous regulation, the validity of which is extended for the next three months, also limits the price of flour type T-500, in packages of up to five kilograms, including five kilograms (it must not exceed 78.65 dinars per kilogram, i.e. €0.67). . The margin calculated on the net invoice price of flour minus rebates and discounts from the supplier is a maximum of 10%.

Maximum retail prices for meat have also been determined:

- the price for boneless pork leg must not exceed 750.20 dinars per kilogram (€6.39),
- the price for boneless pork shoulder must not exceed 738.10 dinars per kilogram (€6.29),
- the price for pork neck with bones must not exceed 689.70 dinars per kilogram (€5.88),
- the price for pork loin with bones must not exceed 659.45 dinars per kilogram (€5.62), and
- the price of fresh chicken carcass must not exceed 319.00 dinars per kilogram (€2.72).

The margin calculated on the net invoice price of fresh pork meat, minus rebates and discounts from the supplier, amounts to a maximum of 10%. The total margin rate on pork, originally packed and declared by the pork producer, must not exceed 8%. The margin calculated on the net invoice price of the fresh chicken carcass, minus rebates and discounts from the supplier, amounts to a maximum of 5%. The regulation applies until October 31, 2022.

State determination of fuel prices in Serbia was introduced in March, and prices are adjusted weekly and published by the competent ministry on Fridays. At the session, the Decision was amended, temporarily banning the export of Euro diesel EN 590 for another 15 days, while the Government of Serbia, with its Decision on the temporary restriction of the export of wood pellets, enabled the export of that product until January 31, 2023, within a certain quota that is 24,000 tons.

The Regulation on the extension of the deadline for submitting requests for the subsidized allocation of safety frames for tractors until December 26, 2022 was adopted and amended.

At the session held on August 25, the Government of the Republic of Serbia adopted two decrees related to the limitation of the difference in the purchase price of sunflowers and the Support Program for sunflower producers in the year 2022.

Regulation on limiting the difference in the purchase price of sunflowers from the year 2022 to a maximum amount of 2.60 dinars (€0.022) including VAT per kilogram, when purchasing sunflowers from primary producers, which are used for further sale to processors.

The main goal of the 2022 sunflower producer support program is to provide financial support to agricultural producers **in order to preserve income stability**. The right to financial support is granted to a legal entity, an entrepreneur and a natural person - the holder of a commercial family agricultural farm that produced sunflowers in the year 2022, which is registered in the Register of Agricultural Farms and is in an active status. Financial support for the agricultural producer is determined in the amount of up to 7.8 dinars per kilogram of the delivered/sold quantity of sunflowers of the year 2022 to a legal entity or entrepreneur engaged in the processing, storage, or export of sunflowers, and a maximum of 200 tons. The amount will be determined depending on the price of sunflowers on the market.

In addition to extraordinary measures to help **sunflower producers, sugar beet producers will also receive financial support in the amount of 35,000 dinars per hectare (€298.33) per hectare in 2023**, up to a maximum of 500 hectares, for a yield of at least 50 tons per hectare of payable sugar beet. .

Also, the Ministry announced that it will support the subsidization of part of the interest for the period of loan repayment delay (grace period) approved by the reprogram, **from six to 12 months**, which are subsidized based on the Rulebook on Credit Support.

Until the end of the year, additional incentives will be provided to agricultural holdings in the form of recourse in the amount of 20 dinars per liter of fuel (€0.17), for 50 liters per hectare, for a maximum of 20 hectares, which means a maximum of 20,000 dinars per holding (€170.47).

#### Consequences of the aforementioned decisions

The decisions made ensured the stability of the domestic market, but the loss of a part of customers abroad was recorded. For example, due to the two-month ban on the export of wheat flour, millers in Serbia missed the opportunity to sell around 40,000 tons of flour and earn 17 million euros.

## 4. Production and trade of mineral fertilizers

Serbia has **only one mineral fertilizer producer**. Elixir Group **produces an average of 600 thousand tons of complex mineral fertilizers** per year, it is the largest exporter, and until recently it was also the largest importer of mineral fertilizers.

The minimum annual need for mineral fertilizers of all types is about 1.5 million tons, of which about 900,000 tons of NPK and about 600,000 tons of nitrogen fertilizers. In the last five years, between 250,000 and 300,000 tons of Urea are consumed annually in Serbia, and another 150,000 - 200,000 tons of CAN and AN fertilizers. Those quantities are completely imported (Tables 1 and 2). The import of mineral fertilizers is free and not burdened with customs duties, and most fertilizers are **imported from Russia (60%)**.

Mineral fertilizers are mostly exported to Hungary, and Romania, Croatia, Bulgaria and Bosnia and Herzegovina stand out from the other countries in the region.

Table 1 Import and export of mineral fertilizers

Fertilizer	I-X 2022.		2021.		2020.		2019.	
	Import	Export	Import	Export	Import	Export	Import	Export
Nitrogen	393.741	61.978	366.009	48.502	553.461	68.133	364.419	66.098
Nitrogen II	78.505	17.983	69.863	15.088	135.662	17.816	69.839	18.548
Potassium	96.281	35	11.4384	2.785	103.620	1.429	111.386	1.258
NPK	164.351	204.125	18.2807	267.216	305.974	204.629	182.844	200.782
Complex	49.331	72.446	93.729	14.2806	91.929	15.1601	94.284	144.680
In total	782.209	354.567	826.792	47.6397	1.190.746	443.608	822.940	431.366

Table 2 Quantity and value of foreign trade exchange of fertilizers of the RS (I-X 2022)

Type of fertiliser	Quantity of tonne		Value USD	
	Import	Export	Import	Export
31021010 - Urea.contains > 45% nitrogen. Use as fertilizer.	246.410	30.658	180.426.361	25.054.679
31021090 - Urea other. Other use.	990	2.297	1.231.697	1.484.339
310221 - Ammonium sulphate	64.010	25.794	27.137.533	15.163.469
310229 - Other	980	/	519.861	/
31023010 - Ammonium nitrate	3.303	265	3.616.129	319.147
3102309010 - Porous ammonium nitrate	6.898	72	7.081.285	56.385
3102309090 - Other ammonium nitrate	71.150	2.892	45.402.166	1.561.317
<b>Nitrogen fertilizer</b>	<b>393.741</b>	<b>61.978</b>	<b>265.415.032</b>	<b>43.639.336</b>
31024010 - Mixture of ammonium nitrate, nitrogen to 28%	73.685	17.902	49.423.216	13.744.991
310260000 - Two-layer sols. Mixtures of Ca and ammonium nitrate. Fertilizer.	2.279	65	1.820.846	53.556
3102900090 - Other	2.541	16	2.066.157	58.699
<b>Nitrogen fertilizer II</b>	<b>78.505</b>	<b>17.983</b>	<b>53.310.219</b>	<b>13.857.246</b>
310420100080 - Potassium chloride K <sub>2</sub> O = < 40%	/	/	/	/
310420500001 - Potassium chloride. K <sub>2</sub> O>40% and =<62%. like fertilizer	93.010	33	36.702.684	25.129
310430000001 - Calciumsulfate. Use as fertilizer.	3.271	2	3.829.056	3.645
<b>Potassium fertilizer</b>	<b>96.281</b>	<b>35</b>	<b>40.531.740</b>	<b>28.774</b>

310510-NPK	377	290	1.188.628	17.313
310520100000 - With a nitrogen content of more than 10% by weight calculated on the dry anhydrous product	91.631	15.959	62.193.565	14.740.008
31052090 – NPK other	72.343	187.876	49.343.273	141.655.273
<b>NPK fertilizer</b>	<b>164.351</b>	<b>204.125</b>	<b>112.725.466</b>	<b>156.412.594</b>
310530 - Diammonium phosphate, used as fertilizer.	50	16	136.034	15.489
310540 - Mono-ammonium phosphate	16.384	8.592	16.580.856	12.175.756
3105510 - Nitrates and phosphates	5.629	/	3.922.364	/
310559 - Other	23.773	58.063	17.246.942	42.376.847
3105908 - Fertilizer containing P and K	3.495	5.775	5.183.868	3.887.982
<b>Compounded fertilizer</b>	<b>49.331</b>	<b>72.446</b>	<b>43.070.064</b>	<b>58.456.074</b>
<b>Total:</b>	<b>782.209</b>	<b>356.567</b>	<b>515.052.521</b>	<b>272.394.024</b>

BiH accounts for 10.97% of RS fertilizer exports (39,100 tonnes) and 0.21% of imports (1,635 tonnes). **Since RS does not produce nitrogen fertilizers, the exported quantity of 18904 tonnes, or 23.64% of total exports, can be treated as re-export** (Table 3).

*Table 3 Exchange between RS and BiH by country in tonnes (I-X 2022)*

	Import	Export
31021010 - Urea.contains > 45% nitrogen. Use as fertilizer.		
	123	7523
31021090 - Urea other. Other use.		
	13	700
310221 - Ammonium sulphate		
	1252	/
31023010 - Ammonium nitrate		
	/	229
3102309090 - Other ammonium nitrate		
	/	399
31024010 - Mixture of ammonium nitrate, nitrogen do 28%		
	/	10390
310260000 - Two-layer sols. Mixtures of Ca and ammonium nitrate. Fertilizer.		
	/	46
3102900090 - Other		
	/	16
310420500001 - Potassium chloride. K <sub>2</sub> O>40% and =<62%. like fertilizer		
	/	4
310510-NPK		
	/	9
310520100000 - With a nitrogen content of more than 10% by weight calculated on the dry anhydrous product		
	/	1004
31052090 – NPK other		
	/	17700

310530 - Diamonium phosphate, used as fertilizer.		
	/	3
310540 - Mono-ammonium phosphate		
	/	252
310559 - Other		
	246	105
3105908 - Fertilizer containing P and K		
	1	1119

## 5. Prices and production trends in Serbian agriculture

### 5.1. Price trends

In order to ensure food security, it is necessary to ensure stable and successful production, which depends on many factors. In crop production, in addition to proper soil cultivation for high and stable yields, the inputs used are extremely important. This primarily refers to seeds and planting material, fertilizers, as well as means of protection. When it comes to livestock production, adequate nutrition is of great importance, as are the facilities in which they are kept. In order to ensure all these conditions, in addition to human labor, means of work, equipment, that is, agricultural machinery, play a major role. All these factors make up the total intermediate consumption, which accounts for almost 60% of the total value of agricultural production.

The prices of reproductive material, labor and services in agriculture in the third quarter of 2022 compared to the same quarter of 2021 increased by 28.7% (Table 4). Observed by product groups in the 3rd quarter of 2022, compared to the same quarter of 2021, the biggest impact on price growth was recorded in the Mineral fertilizers group (126.6%). Prices of reproductive material, labor and services in agriculture in the 3rd quarter of 2022, compared to the 2nd quarter of 2022, decreased by 2.0% on average.

Observed by product groups in the 3rd quarter of 2022, compared to the previous quarter, the biggest impact on the drop in prices was recorded in the Mineral fertilizers group (10.4%).

*Table 4 Indices of the prices of reproduction material, means of labor and services in agriculture*

Item	<u>III quarter 2022</u> III quarter 2021	<u>III quarter 2022</u> II quarter 2022	<u>III quarter 2022</u> Ø 2021
Products and services for current use in agriculture	130.3	97.7	128.5
Seed	185.8	130.2	144.5
Energy	115.2	104.5	116.9
Mineral fertilizers	226.6	89.6	218.3
Plant protection products	124.3	99.6	127.0
Food for animals	111.7	93.8	114.2
Maintenance of equipment	109.0	102.3	108.8
Maintenance of facilities	116.5	102.2	118.4
Other products and services	104.5	100.6	105.0
Products and services for agricultural investments	111.5	102.0	115.5



Machinery in agriculture	111.5	102.0	115.5
Total	128.7	98.0	127.4

[https://www.stat.gov.rs/ areas/prices/](https://www.stat.gov.rs/areas/prices/)

On the other hand, producer prices of agricultural and fishery products in September 2022, compared to the same month in 2021, increased by 21.8% (Table 5).

Observed by main product groups, compared to the same month of the previous year, the greatest impact on price growth was recorded in the following groups: Grain (40.8%), Livestock and poultry (32.6%) and Livestock products (57.2%) .

Producer prices of agricultural and fishery products in September 2022, compared to August 2022, increased by 1.3% on average.

Looking at the main product groups, compared to the previous month, the biggest impact on price growth was recorded in the Livestock products group (9.4%).

Producer prices of agricultural and fishery products in the period January-September 2022, compared to the same period in 2021, increased by 25.4% on average.

Observed by main product groups, in the period January-September 2022 compared to the same period in 2021, the greatest impact on price growth was recorded in the following groups: Grain (36.8%), Livestock and poultry (26.7%) and Livestock products (25.4%).

*Table 5 Producer price indices of agricultural and fishery products*

Item	<u>IX 2022</u> IX 2021	<u>IX 2022</u> VIII 2022	<u>IX 2022</u> Ø 2021	<u>I-IX 2022</u> Ø 2021	<u>I-IX 2022</u> I-IX 2021	<u>IX 2022</u> XII 2021
<i>By sector</i>						
Agriculture and fisheries	121.8	101.3	124.2	122.7	125.4	116.6
Agriculture	121.8	101.3	124.1	122.7	125.4	116.5
Agriculture	117.3	101.0	118.6	124.7	128.2	112.0
Horticulture and viticulture	96.9	97.2	94.8	109.9	108.8	102.4
Animal husbandry	142.9	102.7	151.1	123.2	126.1	137.5
Fishing	162.5	99.3	170.8	137.5	145.4	153.4
<i>By product group total</i>						
Cereals	140.8	101.4	144.1	131.0	136.8	129.8
Wheat	146.7	103.0	157.1	143.6	153.6	120.3
Maize	137.9	100.8	138.4	122.8	126.3	132.8
Industrial plants	110.9	100.9	111.5	111.9	113.0	107.1
Vegetables	99.4	105.7	117.4	113.8	109.2	112.5
Potatoes	141.7	108.2	202.3	167.9	184.3	144.2
Fruit	96.9	97.2	94.8	109.9	108.8	102.4
Cattle and poultry	132.6	97.3	146.6	123.1	126.7	131.9
Cattle	132.6	101.7	137.2	124.4	127.5	127.7
Pigs	137.5	94.1	156.8	124.8	129.0	138.5
Livestock	110.3	102.0	121.1	112.5	114.1	114.8
Livestock products	157.2	109.4	156.7	123.3	125.4	144.5
Milk	163.8	111.6	163.5	123.3	125.2	151.7
Eggs (edible)	155.0	102.8	155.5	129.9	133.6	135.5

<https://www.stat.gov.rs/areas/prices/>

## 5.2. Production trend

The two most important crops of plant production in our country - wheat and corn, in 2021 were grown on an area of about 600 thousand hectares (wheat) and on about a million hectares (corn). Based on estimates in 2022, the areas under wheat increased by about 5%, while the areas under corn decreased by about 7% (sowing was done on an area of 952,216 ha). Wheat was sown on an area of 631,086 ha, with an average yield of 4.9 t/ha.

Regarding the achieved production, we have different estimates. It is estimated that the total production of wheat will be less than 9.6 to 12% and amount to between 3.113 and 3.2 million tons, while the total production of corn will also decrease drastically (year-on-year decrease of 22 to 25%) and this year it will be between 4,523 and 4.7 million tons. Maize yields ranged from 2 to 8t/ha. There will be less corn for export this year, but there will be enough for our own needs, as last year's corn stocks are around 350,000 tons.

On the other hand, sunflower is considered to be a far more drought tolerant crop than the others. The areas under sunflower this year are about 15,000 ha larger than the previous year. According to currently available RZS data, this year with 251,155 ha and an average yield of 2.6t/ha, the expected sunflower crop is at the level of 643,459 tons, an increase of 5.9%). The average yield under this culture is lower by about 10% compared to the previous year. We had sunflower yields at this year's level even in dry years, such as 2015 and 2017. Regardless of the lower yields, we will have a larger crop by some 15,000 tons annually. When it comes to stocks, we enter the new market year with about 30,000 tons of sunflowers.

A lower production of sugar beet by 21.4% and soybean by 26.2% is expected. Soybean yields range from 0.9 to 4.3t/ha, and the lowest yields are in the part of Bačka, which is also the largest producer of soybeans. According to RZS data, sowing was done on an area of 235,275ha, and production of 398,556 tons is expected with an average yield of 1.7t/ha. Given that our soybeans were not competitive, bearing in mind that we were more expensive on the market, stocks of the old crop are at the level of 240,000 tons.

Based on all of the above, we can conclude that 2022 is a very unfavorable and difficult year for agriculture and agricultural producers caused by unfavorable weather conditions. In addition to the current year 2022, as a "dry year" for agriculture, we can single out 2000, 2003, 2007, 2012, 2017, when average yields and total production were also far below average.

Compared to the ten-year average (2012–2021), wheat production is higher by 15.9% and sunflower by 13.0%, while soybean production is lower by 25.4%, corn by 27.5% and sugar beet by 36.3%.

Realized production of raspberries is higher by 4.0%, and cherries by 6.0%.

Compared to the production achieved last year, a higher production of plums is expected, by 14.7%, and a lower production of apples, by 2.1%. Compared to the ten-year average, the production of plums is expected to increase by 6.0% and apples by 15.8%. The expected production of grapes in the Republic of Serbia is 4.3% higher than last year, which is 2.7% more than the ten-year average.

The final data on the production of crops, fruit and grapes in 2022 will be published in March 2023.

According to the data of the Republic Institute of Statistics, Serbia welcomed the beginning of 2022 with a smaller number of cattle by three percent, pigs by 3.9 percent, and goats by 3.6 percent compared to the previous year. Growth was recorded by 0.6 percent in sheep and 0.7 percent in poultry. Compared to the ten-year average (2011-2020), the total number of cattle is lower by 5.1 percent, pigs by 6.5 percent, goats by 6.7 percent and poultry by 9.5 percent, while the number of sheep is higher by 18 percent. According to the RZS data, Serbia welcomed the current year 2022 with 895,514 cattle, 2,868,121 pigs, 1,695,408 sheep, 195,037 goats, and 1,348,293 poultry.

Estimates show that farms producing cow's milk distribute about 59% of the total production to purchasing stations (dairies). Of the amount of cow's milk that remains on the farm (about 41%) for feeding household members and livestock on the farm, about 10% is used, about 22% is processed into dairy products (mainly cheese and cream), and the rest (about 9%) is sold to direct consumers. Representation of cow's milk in the total production of milk on the farm is about 97%, and the rest is made up of sheep's and goat's milk. In the period January-June 2022, the production of consumer cow's milk in dairies decreased by 8.9% compared to the same period of the previous year. Observed quarterly, in the second quarter of 2022 there was a drop in the production of drinking milk of 11.4% compared to the second quarter of 2021.

The purchase prices of cow's milk increased by 22.8% in the period January-June of this year compared to the same period of the previous year. Compared to the same quarter of the previous year, in the II quarter of 2022, the price of milk was higher by 29.0%. Compared to the average price of milk last year, in the first half of the current year, milk prices rose by 20.6%. Consumer prices of milk have a tendency to increase in the first half of 2022 as well - they were higher by 8.2% than in the same period of the previous year. Observed quarterly, in the second quarter of the current year, the growth of consumer prices amounted to 11.2% compared to the same quarter of the previous year. Compared to the average milk price of the previous year, in the period January-June of the current year, a 7.4% increase in milk prices was recorded. Purchase prices of cow's milk tend to grow faster than consumer prices. Namely, in the period January-June of the previous year, consumer prices of milk were 2.8 times higher than purchase prices or by 184%, while in the same period of the current year they were 2.5 times higher or by 155%.

Based on the assessment of the members of the Dairy Industry Group - producers and processors of milk in August 2022 compared to the same period in 2021, the amount of purchased raw milk **decreased by about 17%**. In September of that year the price of raw milk per liter ranges from 35.00 to 70.00 dinars, depending on the dairy. According to the data of the Republic Institute of Statistics (monthly surveys in agriculture - reports of dairy farmers), the production of drinking milk in June of this year compared to May, it recorded a drop of about 10%, while the reduction of this product compared to the realized production in January 2022 is about 3.4%. According to the data of the Republic Institute of Statistics on economic trends in animal husbandry, the number of head of cattle was lower in May of that year. compared to May 2021 by about 8.8%.

The consumption of milk per capita, including all products, amounts to about 180 to 200 kilograms per year. The Republic of Serbia annually produces about 60,000 tons of all types

of cheese. Annual consumption per inhabitant is 10 kilograms. The weak purchasing power of the citizens of Serbia has resulted in the fact that only 25% of the received raw milk is used for cheese processing. In the leading European dairy countries, 43% of raw milk is used in cheese production.

In the RS, cattle are slaughtered in registered slaughterhouses (as of June 31, 2022, 361 of them were registered) and on farms. About 57% of cattle, 40% of pigs and 17% of sheep are slaughtered in slaughterhouses. In the first half, compared to the same period of the previous year, a decrease of 3.3% was recorded in the number of cattle slaughtered in slaughterhouses. Observed quarterly, in the first quarter there was a 4.5% increase in slaughtered cattle in slaughterhouses, and in the second quarter a decrease of 10% compared to the same quarter of the previous year. The biggest decrease was recorded in the category of cattle up to one year old (23.7%). The category of cattle 1-2 years old has the largest share in the total slaughter in the second quarter of this year (74.2%).

The number of pigs slaughtered in slaughterhouses in the first six months of the current year is 15.3% lower than in the same period of the previous year, in the first quarter by 14.9%, and in the second by 15.6%. The biggest drop in the second quarter was in the category of pigs weighing 25 to 50 kg (36.8%). The category of pigs over 50 kg (90.7%) has the largest share in the number of slaughtered pigs.

In the period January-June 2022, the number of slaughtered sheep increased by 8.9% compared to the same period of the previous year, in the first quarter by 11.9% and in the second by 7.5%. In the second quarter, the most slaughtered were cattle from the six-month to one-year-old category (a 29.0% increase compared to the same quarter of the previous year). Of the total number of sheep slaughtered in slaughterhouses, the category of lambs up to 6 months has the largest share (95.1%) in total slaughter.

Observed by category of livestock, in the period January-June, there was an increase in the purchase price of cattle by 26.7% and pigs by 26.2%.

## 6. The future political framework in the sector

It is expected that the Ministry of Agriculture, Water Management and Forestry will adopt the National Program for Agriculture for the period from 2022 to 2024, in which the directions for the development of agriculture on the medium-term plan foreseen by the Strategy for Agriculture and Rural Development from 2014 to 2024 are elaborated in more detail.

The draft program is actually a planning document that should define the guidelines for agricultural development and the dynamics of alignment with the Common Agricultural Policy (CAP) of the EU.

Our most important export products are commercial corn, frozen raspberries, tobacco, cigarettes and fresh apples, while the most important trade partner is the European Union. Unlike the National Program for Agriculture from 2018-2020, whose measures and activities were mostly focused on support within the framework of direct payments and market regulation measures, this program, in addition to these activities, also includes the area of organic production, which in 2020 occupied 21,000 hectares, and by the end of the implementation of this program it should cover 24,000 hectares.

The draft agricultural development program until 2024, among other things, predicted a slight increase in production and exports.

So, for example, it was stated that the plan is for the export of agricultural food products to grow in the total export by 2024 from 3,635 million euros to 4,123 million euros.

The share of fruits and vegetables in total exports to grow from 7 to 10%.

To slightly increase the export of poultry meat from 0.25 to 0.30%, and for the share of eggs to be 0.10 instead of 0.08% in the total export...

In the area of dairying, it was emphasized that the premium is not acceptable from the point of view of the World Trade Organization, and neither is the EU, so it is necessary during the pre-accession period to adapt it to the rules of the ZPP. This will be done in two phases, in the first from the first quarter of 2024, different payment levels will be applied for the delivered milk depending on the quality until reaching the level of EU standards, so that later after the implementation of the Program, the milk premium will be transformed into payment per head dairy cows, which is acceptable from the point of view of the EU CAP.

After achieving stable production, and in order to increase competitiveness, support should be continued according to the quantity of milk delivered, but with the classification of the quality of raw milk by the competent laboratory and the payment of a premium according to the milk quality classes.

Thus, for each class of milk quality, a different amount of premium would be applied as soon as the producers were encouraged to improve the quality of milk, but also the quantity.

Until the calculation of the premium takes effect, it is first necessary to adjust the regulations, i.e. the legal framework (the deadline is the IV quarter of 2023), and the establishment of the calculation mechanism should start from the I quarter of 2024.

## 7. Foreign trade exchange

### 7.1. General overview on foreign trade of agri-food sector

The foreign trade exchange of agriculture and the food industry of Serbia with the world, from January to September of this year, was worth more than 5.7 billion euros. That's an increase of over 20 percent compared to the same period in 2021.

Goods worth almost 3.6 billion euros were exported, an increase of 15.4 percent compared to the results of 2021, with a share in total merchandise exports of 17.8% (Association for Plant Production and Food Industry of the Serbian Chamber of Commerce). Imports also recorded growth, and their value reached 2.1 billion euros in nine months of this year, 29% more than in nine months of last year. The share of agriculture in total merchandise imports is 7.7 percent.

When it comes to the surplus in the foreign trade exchange of agricultural and food products, for nine months of this year it amounted to more than 1.4 billion euros, which is a decrease of 0.5% compared to the nine months of the previous year. The coverage of imports by exports is 166.1% and is lower than the coverage in the observed period of 2021, when it was 185.7%.

Agrarian Serbia mostly exported fruits and vegetables (24.4%), cereals (20.9%), tobacco and tobacco products (9.5%) and beverages 8.2%. When it comes to the import of products from

the agrarian sphere, the largest share is fruit and vegetables with 20.2%, coffee and tea with 11.1% and tobacco with 9.6%.

The most valuable agrarian exports were corn (EUR 280.3 million), frozen raspberries (EUR 256.4 million), cigarettes (EUR 176.5 million), wheat and corn worth EUR 175.8 million, and other products. On the import side, the most important products were tobacco extracts and essences with an import value of 41.9 million euros, bananas, pork, coffee, cigarettes...

The most important foreign trade partners of Serbia in exports from January to September this year are the EU countries, where we market more than half of agricultural goods (51.4%). Then, the countries of the CEFTA region, the Russian Federation (RF)... Compared to the same period last year, the value of exports to EU countries increased by 10.2%, to the CEFTA market by 26.8%, while exports to the RF increased by 10, 3%. During the nine months of 2022, Serbia imported goods worth almost 1.5 billion euros from the EU countries, 179.7 million euros from the countries of the CEFTA region, and 75.6 million euros from the RF.

## 7.2. Foreign trade with BiH

Bosnia and Herzegovina is one of the most important trade partners of the RS when it comes to trade in agricultural and food products (Charts 1 and 2). The participation of BiH in the total export of agricultural and food products of the RS ranged from 10.53 (2021) to 13.15% (2019). In the total export of CEFTA countries, the participation of **BiH ranged from 43.10 (2021) to 47.15% (2020)**. When it comes to **imports, the situation is significantly less favorable for BiH**. Its participation ranged from 3.22 (I-IX 2022) to 4.15% (2021). In the total export of CEFTE countries, the participation of BiH ranged from 43.10 (2021) to 47.15% (2020). In total imports from the CEFTA countries, the participation of BiH ranged from 38.48 (I-IX 2022) to 43.05% (2021). The **coverage of imports by exports in BiH ranged from 16.62 (I-IX 2022) to 22.24% (2021)**, which leaves plenty of room for structural changes in the agricultural and food sector to change the situation for the better.

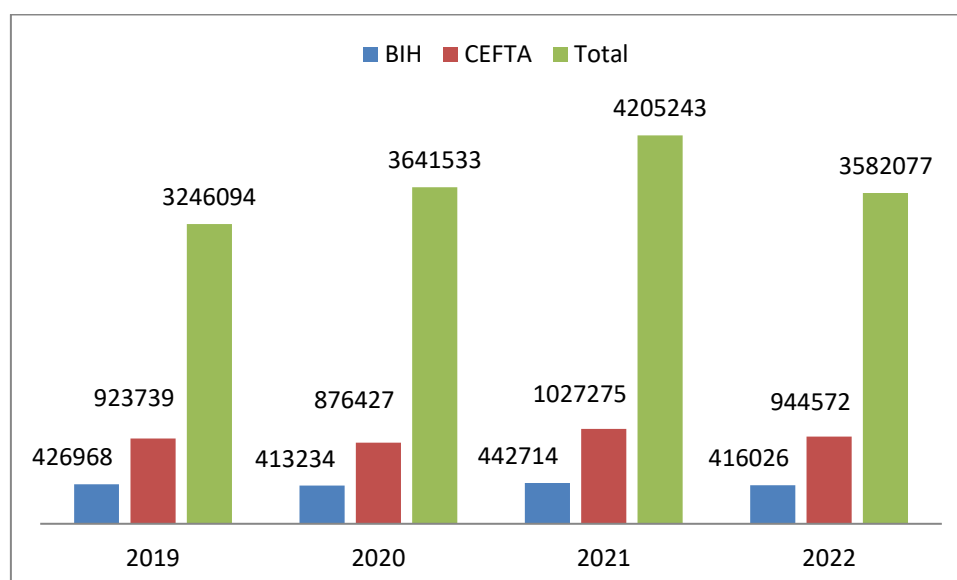


Figure 1 Export of agricultural and food production BiH in €000

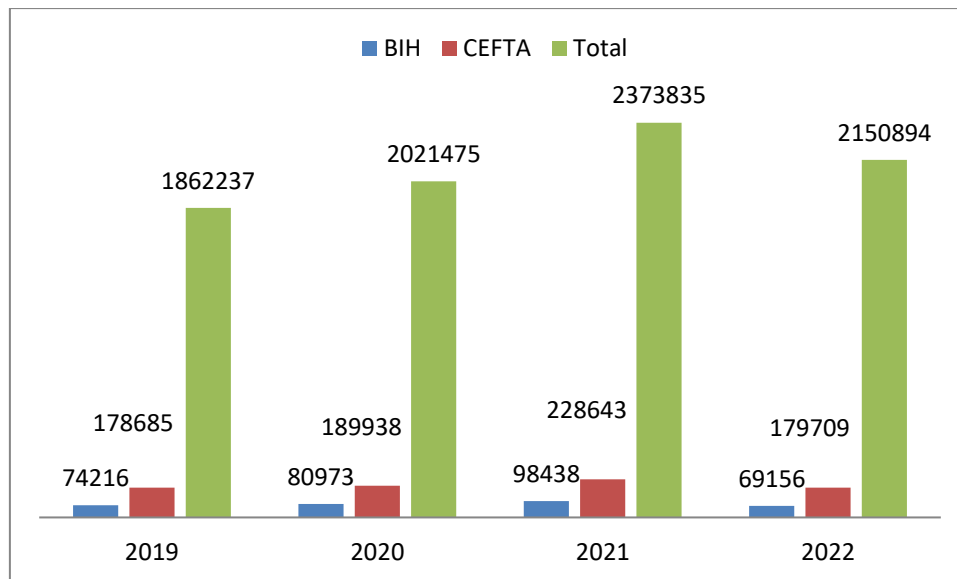


Figure 2 Import of agricultural and food products from Bosnia and Herzegovina in €000

When analyzing the foreign trade exchange of agricultural and food products between the RS and Bosnia and Herzegovina, we were guided by the Regulation on Harmonization of the Customs Tariff Nomenclature for 2022. The analysis included products from:

heads 2. MEAT AND OTHER EDIBLE SLAUGHTER PRODUCTS (Charts 3-8)

0201 Beef, fresh or chilled

0202 Beef, frozen

0203 Pork, fresh, chilled or frozen

0204 Meat of sheep or goat, fresh, chilled or frozen

0207 Meat and other edible offal of poultry of heading 0105, fresh, chilled or frozen

0210 Meat and other edible offal, salted, in brine, dried or smoked; Edible flour and powder from meat or other slaughterhouse products

head 4. MILK AND MILK PRODUCTS; POULTRY AND BIRD EGGS; NATURAL HONEY; EDIBLE PRODUCTS OF ANIMAL ORIGIN, NOT MENTIONED COVERED IN SECOND PLACE (Charts 9-14)

0401 Milk and cream, not concentrated and not containing added sugar or other sweetening matter

0402 Milk and cream, concentrated or containing added sugar or other sweetening matter

0403 Yoghurt; Buttermilk, sour milk and sour cream, kefir and other fermented or acidified milk and cream, concentrated or not, with or without added sugar or other sweetening matter, flavored or unflavored, with added fruit content, of nuts or cocoa or without added fruit, nuts or cocoa

0404 Whey, whether or not concentrated, with or without added sugar or other sweetening matter; Products consisting of natural milk ingredients with or without added sugar or other sweetening matter, not elsewhere specified or included

0405 Butter and other fats and oils, obtained from milk; Milk spreads

0406 Cheese and cottage cheese

heads 10. CEREALS (Charts 15 and 16)

1001 Wheat and wheat

1005 Corn

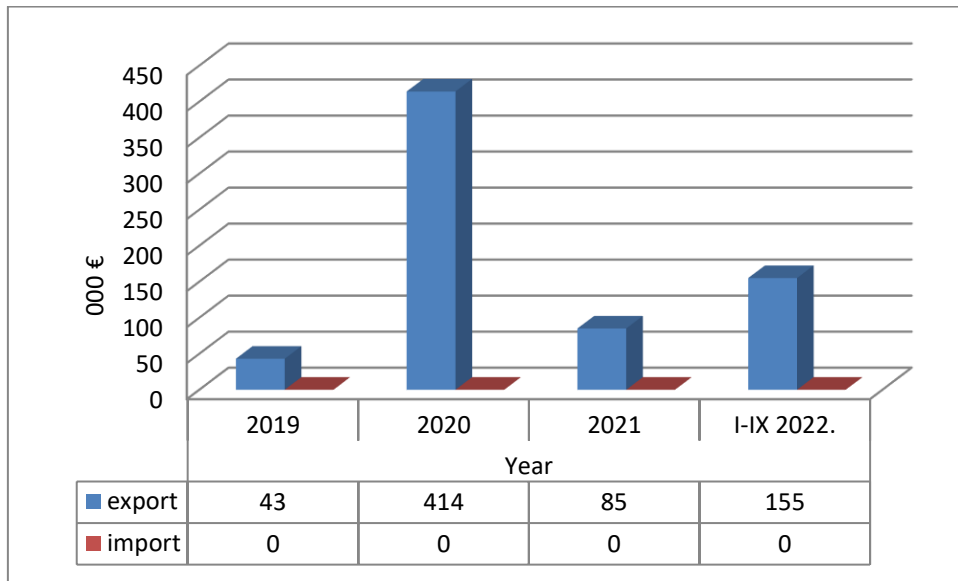


Figure 3 Export and import of products from tariff group 0202 - Beef, frozen

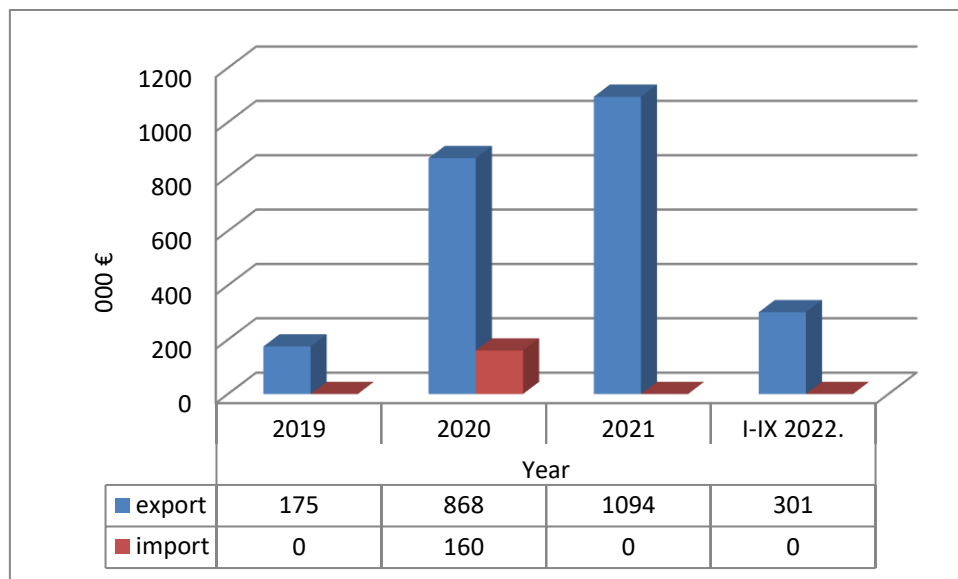


Figure 4 Export and import of products from tariff group 0201 - Beef, fresh or chilled



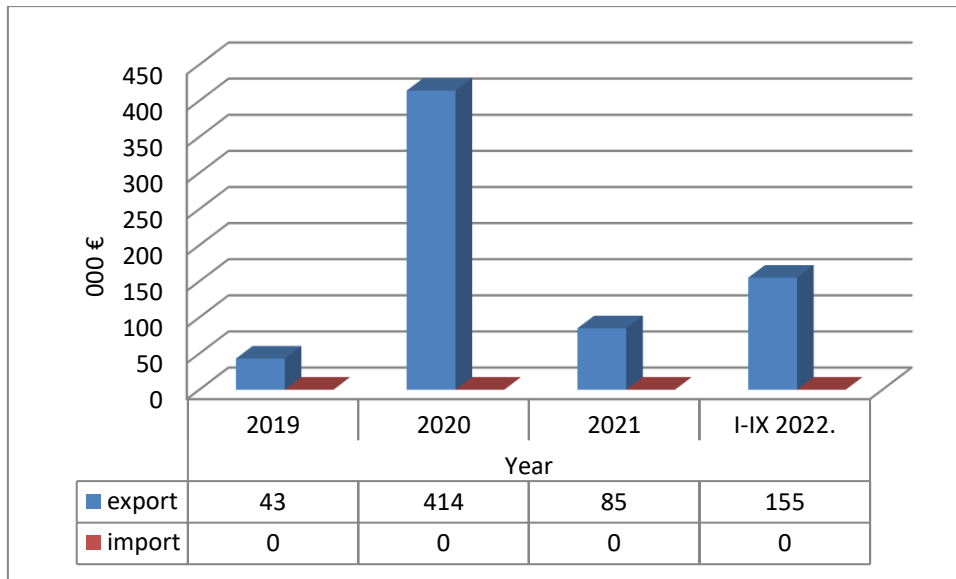


Figure 5 Export and import of products from tariff group 0202 - Beef, frozen

In the last 3 years, the export of beef from tariff groups 0201 and 0202 has increased 5.4 times, but it is obvious that this year the level of 2021 will not be reached. In the best case, 50% of exports from 2021 will be reached.

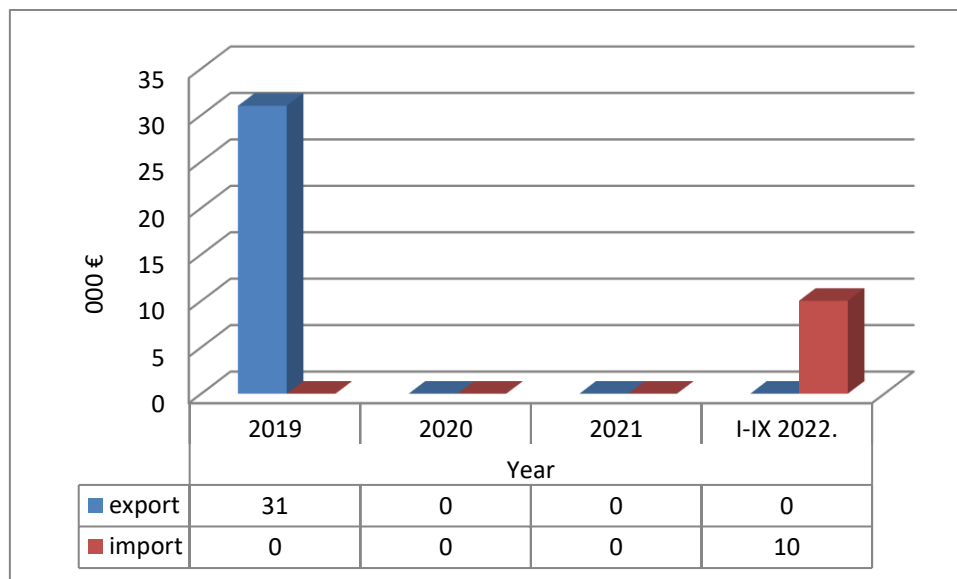


Figure 6 Export and import of products from tariff group 0203 - Pork, fresh, chilled or frozen

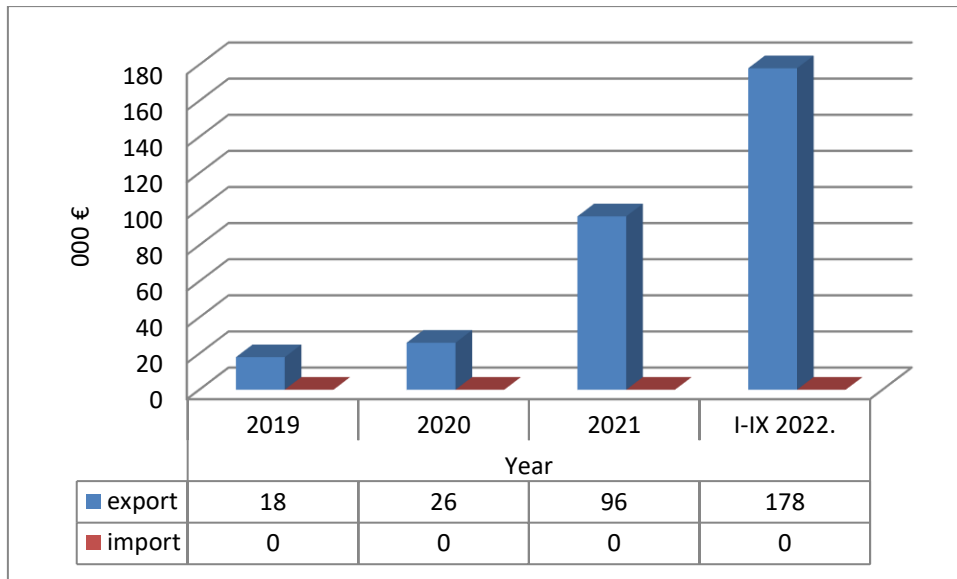


Figure 7 Export and import of products from tariff group 0204 - Meat of sheep or goat, fresh, chilled or frozen

Exported and imported amounts of pork, sheep and goat meat are negligible because we are not competitive in terms of price (when it comes to pork meat), and RS meets its needs for sheep and goat meat.

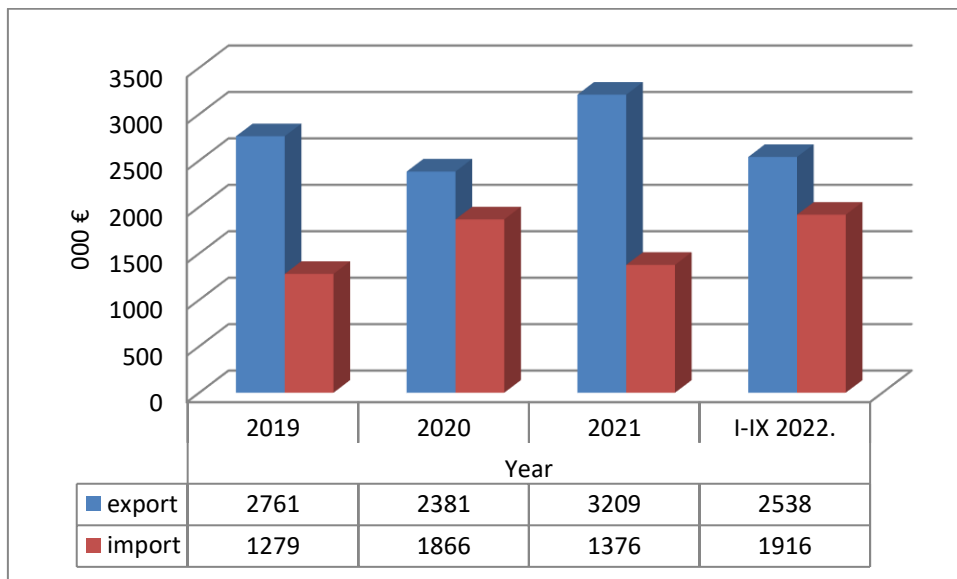


Figure 8 Export and import of products from tariff group 0207 - Meat and other edible poultry products from tariff number 0105, fresh, chilled or frozen

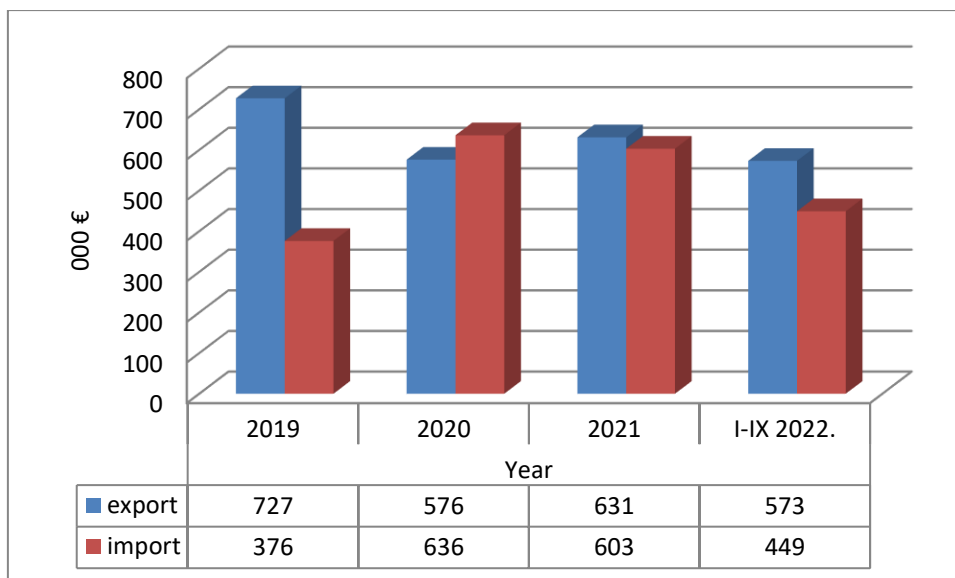


Figure 9 Export and import of products from tariff group 0210

Data for tariff groups 0207 and 2010 also show that the crisis has affected the entire livestock industry in the RS. The export of poultry meat and other edible poultry products, after reaching 3.2 million euros in 2021, is stagnating this year. On the other hand, imports in the first three quarters of this year exceeded last year's value by 39.24%. Only in this tariff group does RS have a negative balance in trade with Bosnia and Herzegovina.

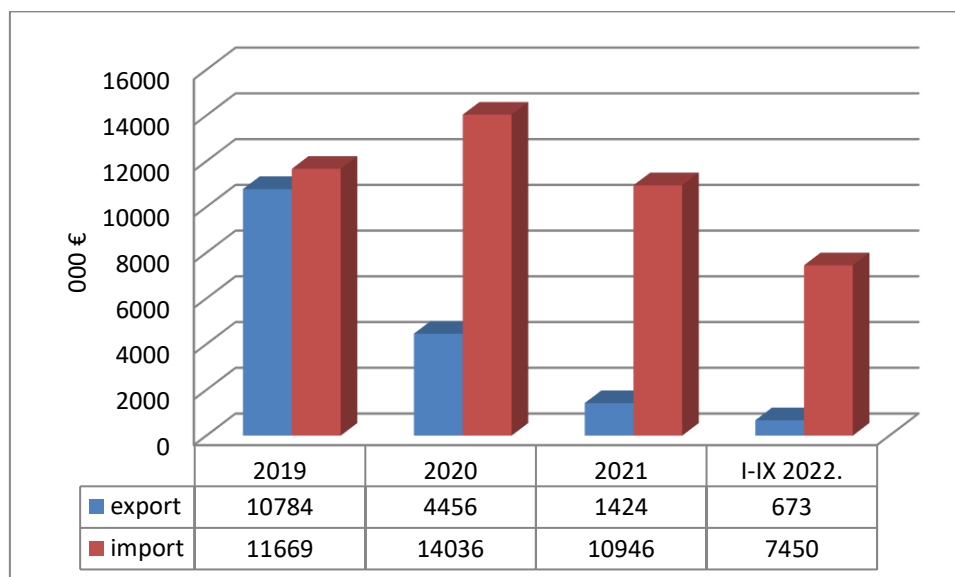


Figure 10 Export and import of products from tariff group 0401 - Milk and cream, unconcentrated and without added sugar or other sweetening matter

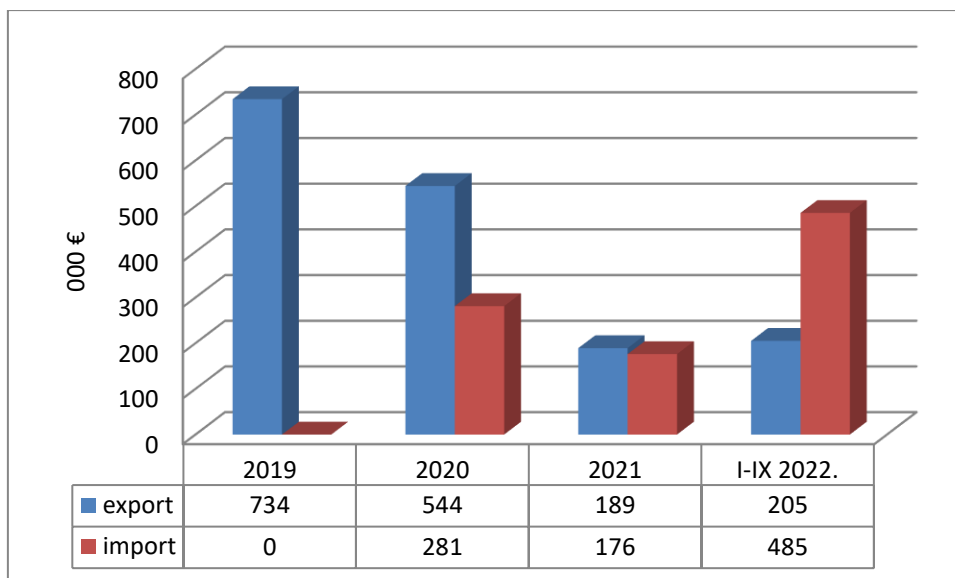


Figure 11 Export and import of products from tariff group 0402 - Milk and cream, concentrated or containing added sugar or other sweetening matter

The decrease in the number of cows and milk delivered began to have a negative impact on the foreign trade balance of the RS. The export of products from the tariff group 0401 to BIH decreased 7.5 times, with the fact that by the end of this year we can expect even worse results (the estimated value of exports is around one million euros). The value of imports from BIH will most likely be slightly lower than in 2021, but not more than 10%. Producers in Bosnia and Herzegovina should be concerned about the 40% decrease in exports to the RS in the last 2 years and the absence of exports of products from tariff groups 0403, 0404 and 0405. Producers from the RS have apparently reoriented in part to products from tariff groups 0403, 0404, 0405 and 0406 because it is a question of products with a higher processing stage and higher prices.

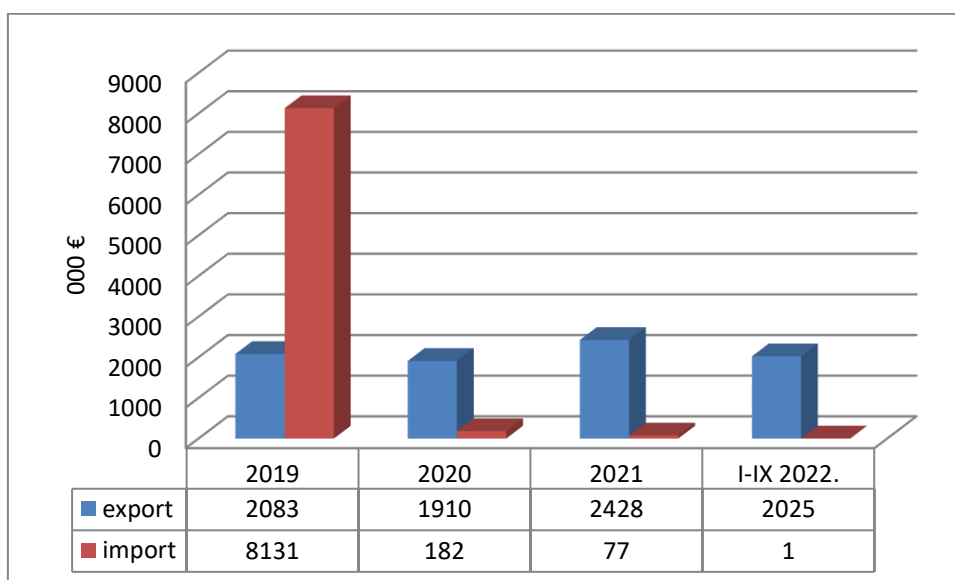


Figure 12 Export and import of products from the tariff group 0403

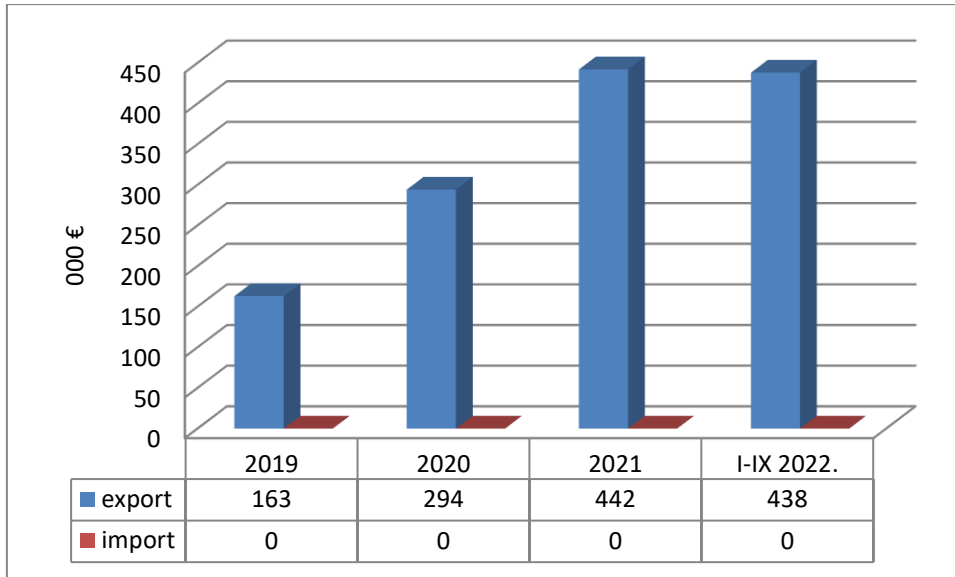


Figure 13 Export and import of products from the tariff group 0404

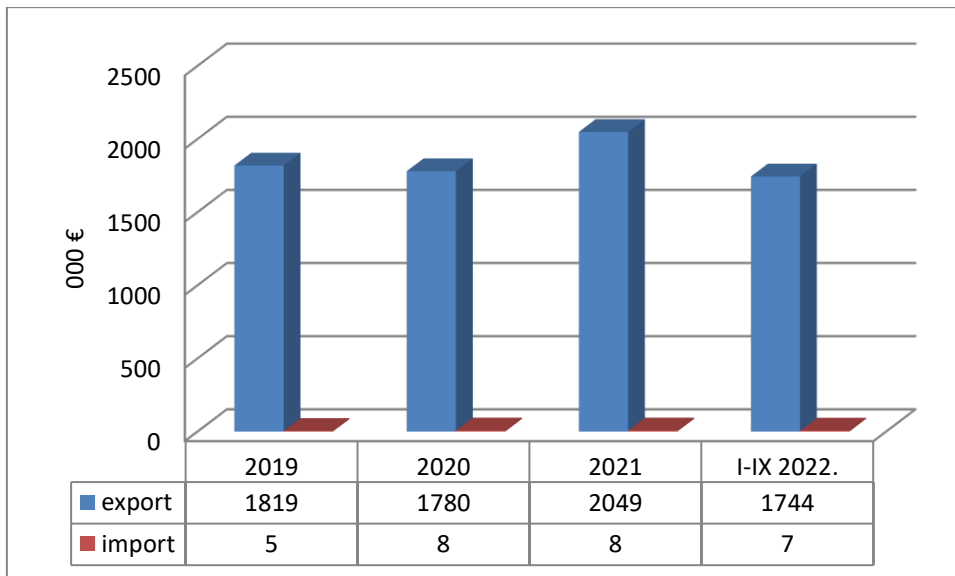


Figure 14 Export and import of products from the tariff group 0405

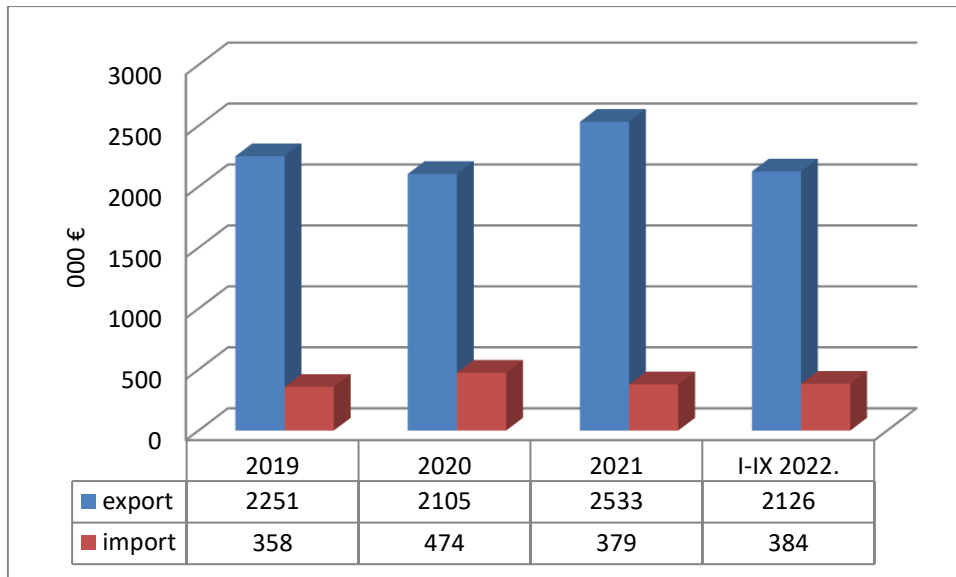


Figure 15 Export and import of products from the tariff group 0406

Bosnia and Herzegovina is traditionally a big customer of our cereals. For years, there has been a noticeable trend of increasing exports of wheat and corn, but the authorities in Bosnia and Herzegovina would have to find reasons for a significant jump in imports in the first nine months of 2022. It is 59.17% for wheat and 27.17% for corn.

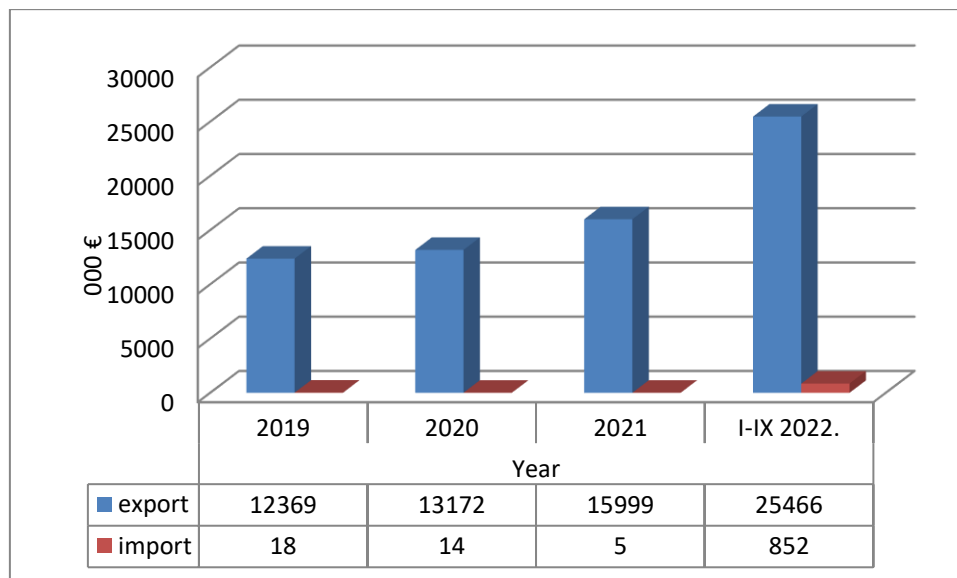


Figure 16 Export and import of products from the tariff group 1001 - Wheat and wheat

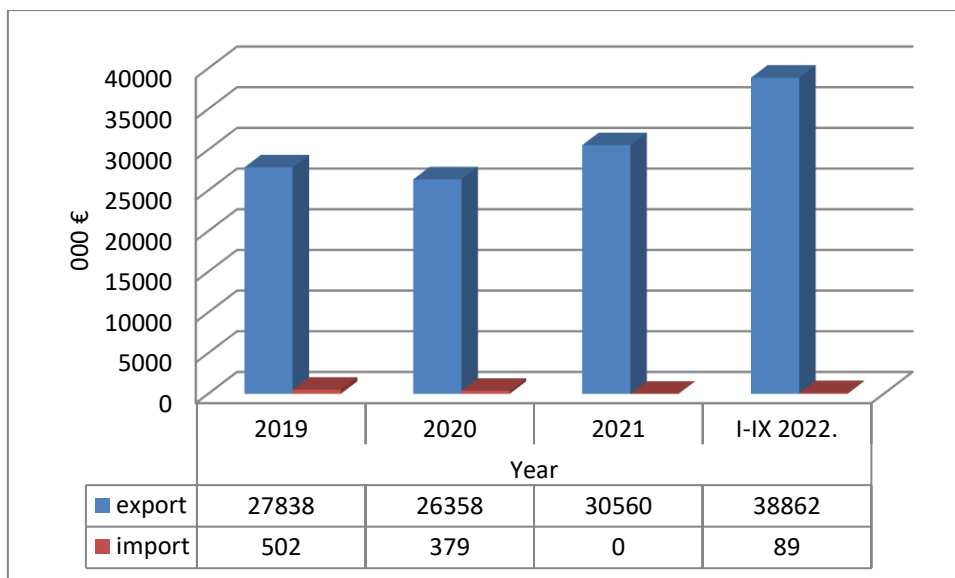


Figure 17 Export and import of products from the tariff group1005 - Maize

Both countries, RS and Bosnia and Herzegovina, have a very sensitive and unfavorable structure of exports and imports. In the 4 years covered by this analysis, there was almost no change in the products that are at the top of the export and import lists. In addition, the first five products from this list have a significant share in total exports and imports (from 38.19 to 43.24% and from 22.18 to 25.66%). This structure is subject to risks (climate, market, etc.) and the consequences will be visible soon. Graphs 17-21 show the values of exports and imports of goods that are in the top 5 in all years of observation, and tables 6-13 list 20 tariff lines by value of exports and imports.

The fact that there are problems of a structural nature in the agriculture of Bosnia and Herzegovina is best shown by the following graphs. **A large import of strategic products and consumer goods is noticeable, and only the export of raspberries is stable.** In the current situation, when the price of raspberries on the world market is decreasing and the RS has difficulties with placement and collection, it is difficult to expect a repetition of the results from previous years.

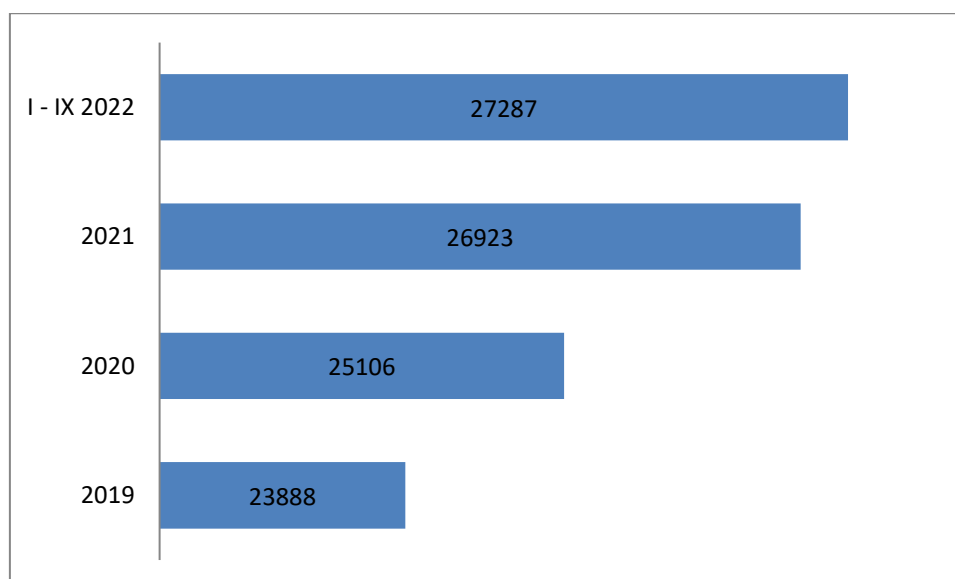


Figure 18 Exports of tariff line 120600990000 - Sunflower seeds, broken or not, other

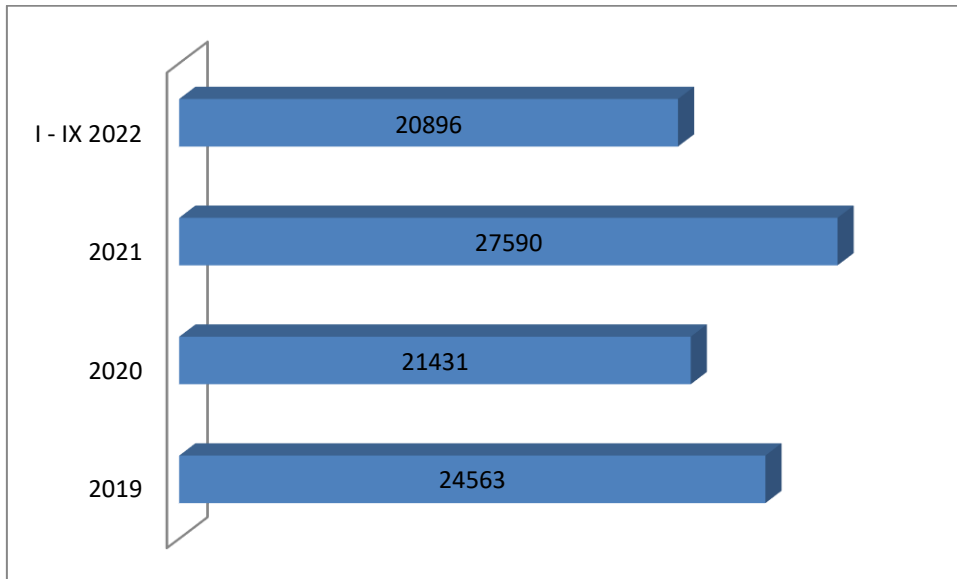


Figure 19 Export tariff line 100590000000 - Maize, other

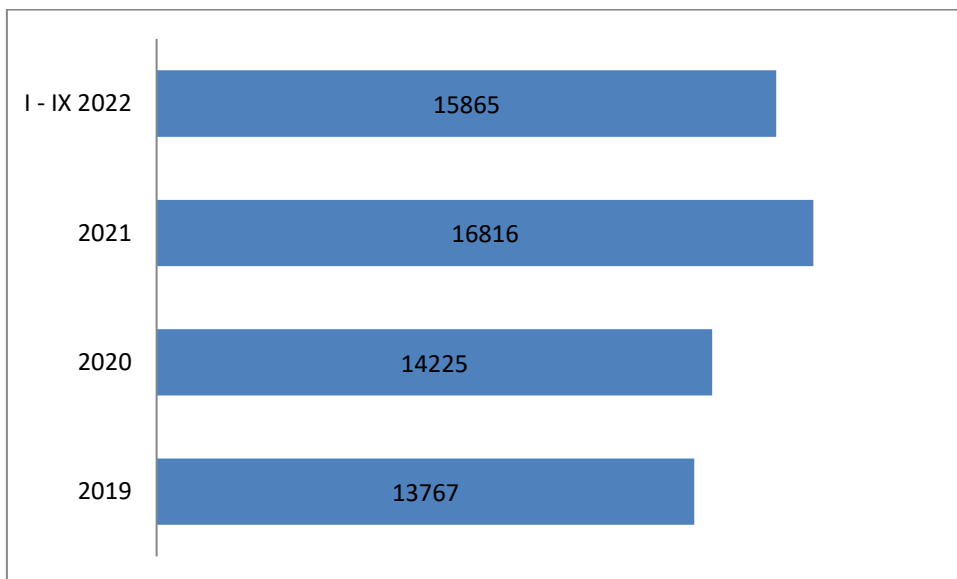


Figure 20 Export of tariff line 220300010000- Beer, obtained from malt, in bottles up to 10l



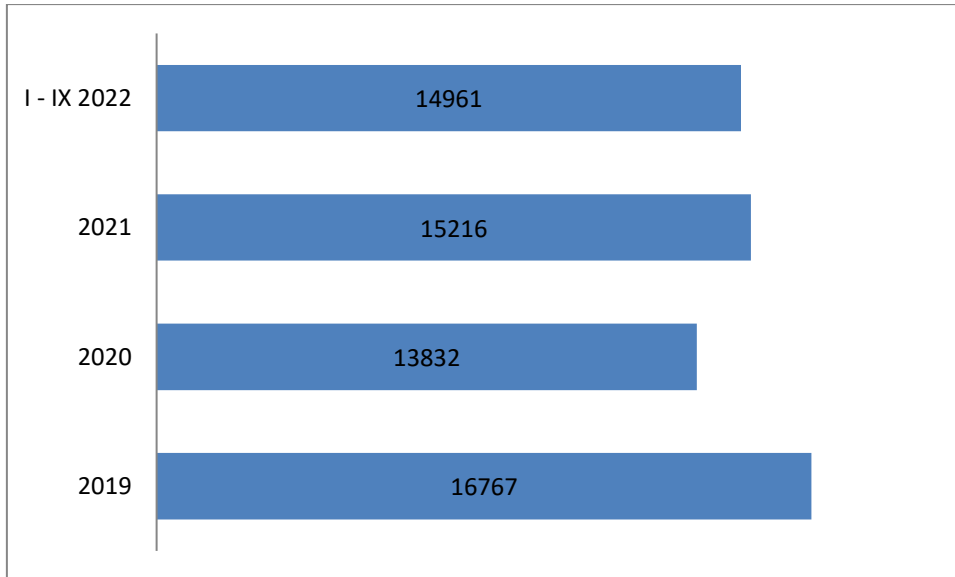


Figure 21 Export of tariff line 240220900000 - Cigarettes containing tobacco, other

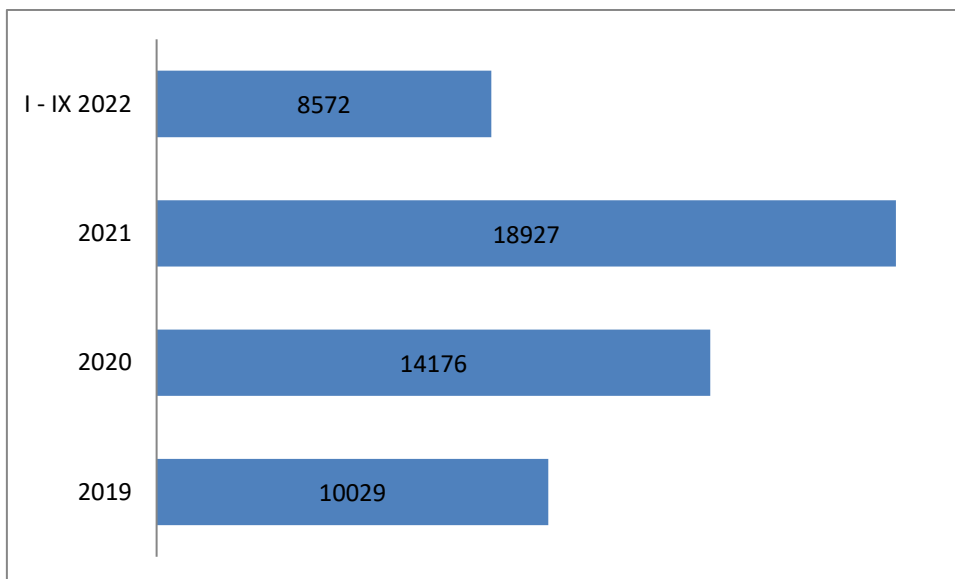


Figure 22 Import of tariff line 081120310000 - Raspberries, frozen, without added sugar

The products that are in the first 20 on the export list in BIH and the products that are in the Excel Export attachment are of Serbian origin. **There is no reexport because the export was carried out under the Regional Convention on Pan-Euro-Mediterranean Preferential Rules of Origin. On May 29, 2013, the National Assembly of the RD adopted the law on the ratification of this convention.**

Table 6 The first 20 products by value of exports from the RS to BIH in 000 euros for the period I - IX 2022

Product	Value
120600990000 Sunflower seeds, whether or not broken, other	27.287
100590000000 Corn, others	20.896
220300010000 Beer, obtained from malt, in bottles up to 10 l	15.865
100590000015 Maize, others, temporary export restriction	14.961
240220900000 Cigarettes containing tobacco, other	14.903
100199000000 Other wheat and meslin, other	13.946
220299190080 Non-alcoholic drinks, without milk, etc	12.765
190531990000 Sweet biscuits, other, milk fat <8%	11.115
220300090000 Beer, obtained from malt, in containers up to 10 l, other	9.791
151211910000 Sunflower oil, raw, for other purposes	9.176
220210000000 Water, plain and carbonated, with added sugar	8.745
110100150000 Flour, from common wheat and spelled	8.639
081120310000 Raspberries, frozen, without added sugar	8.572
100199000015 Other wheat and meslin, other, export restrictions	8.464
210690989080 Food products not mentioned anywhere else	8.180
210690929080 Prod. for food, nn,=<1.5%mm,=<5%(sach., starch), other	8.015
230990969001 Other fodder, complete and supplementary mixtures	7.646
151219900001 Edible sunflower oil, other, for other purposes	7.147
230990510001 Complete feed mixtures for cattle, starch>30%, mp<10%	7.085
160100999080 Products made of meat, blood, insects, edible, other	6.861

Table 7 The first 20 products by value of imports into the RS from Bosnia and Herzegovina in 000 euros for the period I - IX 2022.

Product	Value
081120310000 Raspberries, frozen, without added sugar	8.572
230400000000 Oil cakes and other solid residues, from soybean oil	5.941
040120110000 Milk and cream, unconcentrated, without sugar, mm>1%=<3%, V=<2l	5.911
160232300080 Other canned products, from poultry, >=25-57% meat, outside NO	3.784
030211800000 Trout, fresh or chilled, other	2.201
190120000001 Bakery products, frozen, not thermally treated	2.088
160232900080 Other canned products, from poultry, other, except from NO	1.897
160420700000 Preserves prepared from Euthynnus fish	1.749
190531990000 Sweet biscuits, other, milk fat <8%	1.740
040711000080 Fertilized eggs for incubation, from Gallus hens, outside the EU	1.723
160241100080 Hams, steaks, home. pig, canned, outside EU/CH/LI/NO	1.441
190532990000 Waffles and wafers, without chocolate topping, other	1.391
190531190000 Sweet biscuits, chocolate, net mass > 85 gr	1.356
180632900000 Chocolate (block, board, bar), with cocoa, unfilled, other	1.173
190590800080 Bakery products, other, without sugar, other	1.156
220299190080 Non-alcoholic drinks, without milk, etc	1.144
220210000000 Water, plain and carbonated, with added sugar	1.106
081120591000 Blackberries, without added sugar, frozen	1.040
040120910000 Milk and cream, unconcentrated, without sugar, mm>3%=<6%, V=<2l	998
180690600000 Spreads containing cocoa	976

Table 8 The first 20 products by value of exports from the RS to BIH in 2021 (in 000 euros)

Product	Value
100590000000 Maize, except seed corn	27,590
120600990000 Sunflower seeds, whether or not broken, other	26,923
220300010000 Beer, obtained from malt, in bottles up to 10 l	16,816
240220900000 Cigarettes containing tobacco, other	15,216
100199000000 The remaining wheat, spelled and half, except for sowing	14,035
170199100080 White sugar, in solid form, for countries outside the EU	13,249
220299190080 Non-alcoholic drinks, without milk, etc	12,852
190531990000 Sweet biscuits, other, milk fat <8%	11,752
151219900001 Edible sunflower oil, other, for other purposes	10,848
210690989080 Food products not mentioned anywhere else	10,387
220300090000 Beer, obtained from malt, in containers up to 10 l, other	10,384
210690929080 Prod. for food, nn,=<1.5%mm,=<5%(sach.,starch), other	9,164
160100990080 Meat products, offal, blood, edible, except from NO	8,864
230990969001 Other fodder, complete and supplementary mixtures	8,771
190531190000 Sweet biscuits, chocolate, net mass > 85 gr	8,765
110100150000 Flour, from common wheat and spelled	8,216
230990510001 Complete feed mixtures for cattle, starch>30%, mp<10%	7,963
210390909080 Mixed spices; sauces, other, outside EU/EFTA	7,385
220210000000 Water, plain and carbonated, with added sugar	6,595
010229910080 Livestock, other, m>300kg, other, for slaughter, for land. outside the EU	5,445

Table 9 The first 20 products by value of imports into the RS from BIH in 2021 (in 000 euros)

Product	Value
081120310000 Raspberries, frozen, without added sugar	18,927
230400000000 Oil cakes and other solid residues, from soybean oil	7,126
040120110000 Milk, cream, non-concentrated, without sugar, mm>1%=<3%, V=<2l	4,976
160232300080 Other canned products, from poultry, >=25-57% meat, outside NO	4,488
040120110080 Milk, cream, non-concentrated, without sugar, mm>1%=<3%,=<2l, outside the EU	4,066
030211800000 Trout, fresh or chilled, other	3,096
120190000000 Soybeans in grain, broken or crushed, except for sowing	2,704
081120591000 Blackberries, without added sugar, frozen	2,676
190120000001 Bakery products, frozen, not thermally treated	2,632
160420700000 Preserves prepared from Euthynnus fish	2,302
160232900080 Other canned products, from poultry, other, except from NO	2,283
190531190000 Sweet biscuits, chocolate, net mass > 85 gr	2,247
180690600000 Spreads containing cocoa	2,060
151219900001 Edible sunflower oil, other, for other purposes	2,040
220210000000 Water, plain and carbonated, with added sugar	1,903
190532990000 Waffles and wafers, without chocolate topping, other	1,897
190531990000 Sweet biscuits, other, milk fat <8%	1,812
160241100080 Hams, steaks, home. pig, canned, outside EU/CH/LI/NO	1,736
040711000080 Fertilized eggs for incubation, from Gallus hens, outside the EU	1,380
180632900000 Chocolate (block, board, bar), with cocoa, unfilled, other	1,254

Table 10 Table 10. The first 20 products by value of exports from RS to BIH in 2020 (in 000 euros)

Product	Value
120600990000 Sunflower seeds, whether or not broken, other	25.106
100590000000 Maize, except seed corn	21.431
151211910000 Sunflower oil, raw, for other purposes	17.065
220300010000 Beer, obtained from malt, in bottles up to 10 l	14.225
240220900000 Cigarettes containing tobacco, other	13.832
190531990000 Sweet biscuits, other, milk fat <8%	11.389
230990510001 Complete feed mixtures for cattle, starch>30%, mp<10%	10.201
151219900001 Edible sunflower oil, other, for other purposes	9.909
220300090000 Beer, obtained from malt, in containers up to 10 l, other	9.797
160100990080 Meat products, offal, blood, edible, except from NO	9.306
220299190080 Non-alcoholic drinks, without milk, etc	9.273
110100150000 Flour, from durum wheat	8.904
190531190000 Sweet biscuits, chocolate, net mass > 85 gr	8.326
230990969001 Other fodder, complete and supplementary mixtures	8.208
210690989080 Food products not mentioned anywhere else	8.152
010229910080 Livestock, other, m>300kg, other, for slaughter, for land. outside the EU	8.135
210690929080 Prod. for food, nn,=<1.5%mm,=<5%(sach.,starch), other	7.733
170199100080 White sugar, in solid form, for countries outside the EU	7.185
100199000080 Other wheat, spelled and half, except for sowing, other	6.613
210390909080 Mixed spices; sauces, other, outside EU/EFTA	6.297

Table 11 The first 20 products by value of imports into the RS from Bosnia and Herzegovina in 2020 (in 000 euros)

Product	Value
081120310000 Raspberries, frozen, without added sugar	14.176
040120110080 Milk, cream, non-concentrated, without sugar, mm>1%=<3%,=<2l, outside the EU	11.451
160232300080 Other canned products, from poultry, >=25-57% meat, outside NO	4.186
030211800000 Trout, fresh or chilled, other	2.660
220210000000 Water, plain and carbonated, with added sugar	2.543
190120000001 Bakery products, frozen, not thermally treated	2.227
190531190000 Sweet biscuits, chocolate, net mass > 85 gr	2.209
160420700000 Preserves prepared from Euthynnus fish	2.203
040120910080 Milk, cream, non-concentrated, sugar-free, m>3%=<6%, V=<2l, outside the EU	2.022
180690600000 Spreads containing cocoa	1.994
160232900080 Other canned products, from poultry, other, except from NO	1.857
190531990000 Sweet biscuits, other, milk fat <8%	1.700
040719190080 Fertilized eggs for incubation, from other poultry, outside the EU	1.677
160241100080 Hams, steaks, home. pig, canned, outside EU/CH/LI/NO	1.648
230400000000 Oil cakes and other solid residues, from soybean oil	1.584
190532990000 Waffles and wafers, without chocolate topping, other	1.457
180632900000 Chocolate (block, board, bar), with cocoa, unfilled, other	1.128
210690989080 Food products not mentioned anywhere else	880
081120591000 Blackberries, without added sugar, frozen	878
190532190000 Waffles and wafers, chocolate, others	823

Table 12 Table 12. The first 20 products by value of exports from RS to BIH in 2019 (in 000 euros)

Product	Value
151211910000 Sunflower oil, raw, for other purposes	30.567
100590000000 Maize, except seed corn	24.563
120600990000 Sunflower seeds, whether or not broken, other	23.888
240220900000 Cigarettes containing tobacco, other	16.711
220300010000 Beer, obtained from malt, in bottles up to 10 l	13.767
230990510001 Complete feed mixtures for cattle, starch>30%, mp<10%	13.755
220299190080 Non-alcoholic drinks, without milk, etc	11.496
190531990000 Sweet biscuits, other, milk fat <8%	11.205
100199000000 The remaining wheat, spelled and half, except for sowing	11.110
151219900001 Edible sunflower oil, other, for other purposes	10.945
040120990080 Milk, cream, unconc., without w., mm>3=<6%,>2l, outside EU/CH/LI	9.874
160100990080 Meat products, offal, blood, edible, except from NO	8.875
110100150000 Flour, from common wheat and spelled	8.694
190531190000 Sweet biscuits, chocolate, net mass > 85 gr	8.021
220300090000 Beer, obtained from malt, in containers up to 10 l, other	7.891
210690989080 Food products not mentioned anywhere else	6.708
220210000000 Water, plain and carbonated, with added sugar	6.605
230990969001 Other fodder, complete and supplementary mixtures	6.449
210390909080 Mixed spices; sauces, other, outside EU/EFTA	5.842
210690929080 Prod. for food, nn,=<1.5%mm,=<5%(sach.,starch), other	5.248

Table 13 Table 13. The first 20 products by value of imports into the RS from BIH in 2019 (in 000 euros)

Product	Value
081120310000 Raspberries, frozen, without added sugar	10.029
040120110080 Milk, cream, non-concentrated, without sugar, mm>1%=<3%,=<2l, outside the EU	8.868
040390590080 Milk residues, non-arom., other forms, without w., m>6%, other	3.847
040310110080 Yogurt, unflavored, without fruit & sugar, mm=<3%, outside EU/CH/LI	3.415
230400000000 Oil cakes and other solid residues, from soybean oil	2.965
160232300080 Other canned products, from poultry, >=25-57% meat, outside NO	2.795
160232900080 Other canned products, from poultry, other, except from NO	2.716
030211800000 Trout, fresh or chilled, other	2.304
040120910080 Milk, cream, non-concentrated, sugar-free, m>3%=<6%, V=<2l, outside the EU	2.163
190531190000 Sweet biscuits, chocolate, net mass > 85 gr	1.834
160241100080 Hams, steaks, home. pig, canned, outside EU/CH/LI/NO	1.653
180690600000 Spreads containing cocoa	1.535
160420700000 Preserves prepared from Euthynnus fish	1.532
220210000000 Water, plain and carbonated, with added sugar	1.388
190120000001 Bakery products, frozen, not thermally treated	1.368
190531990000 Sweet biscuits, other, milk fat <8%	1.129
180632900000 Chocolate (block, board, bar), with cocoa, unfilled, other	1.115
190532990000 Waffles and wafers, without chocolate topping, other	1.062
081190500001 Blueberries (Vaccinium myrtillus L), frozen, without sugar	1.029
190590550080 Bakery products, obtained by stretching, other	680

Complete lists of exports and imports of agricultural and food products by year are given in the EXCEL attachment (Excel Export, Excel Import attachments).

## 8. Conclusion

The final evaluation of the foreign trade exchange between the RS and Bosnia and Herzegovina is inseparable from the issue of agrarian stability and agrarian policy. Considering the similarities of opportunities and obstacles to the development of agriculture in the RS and BIH, the following can be concluded:

There is a noticeable trend of growth in exports and imports of agricultural and food products;

BIH can only reduce the deficit in commodity exchange through structural changes in the agricultural sector;

Both countries must diversify exports and imports and reduce the risks that may arise from market disruptions;

When adopting agricultural policy measures, care must be taken that they do not threaten the export potential of the sector;

Institutions that monitor the situation in the sector and the market of agricultural and food products should be strengthened, not only in personnel but also technically, in order to monitor the situation and be able to quickly react to changes. The latter implies the connection of competent institutions and ministries and, if there are opportunities, to hire scientific institutions that will analyze the effects of adopted measures and predict changes in the future.

## Annexes

### Annex 1. Valid legal acts relevant to incentives in agriculture

1. Agriculture and rural development strategy of the Republic of Serbia for the period 2014–2024. years
2. Law on Agriculture and Rural Development ("Official Gazette of the RS", No. 41/09, 10/13 - Dr. Law, 101/16, 67/21 - Dr. Law and 114/21)
3. Law on Incentives in Agriculture and Rural Development ("Official Gazette of RS", no. 10/13, 142/14, 103/15 and 101/16)
4. Regulation on the distribution of incentives in agriculture and rural development in 2022 ("Official Gazette of RS", no. 125/21, 10/22 and 30/22)
5. Rulebook on determining areas with difficult working conditions in agriculture ("Official Gazette of RS", number 132/21)
6. Rulebook on the conditions, method and form of request for exercising the right to the milk premium ("Official Gazette of the RS", no. 28/13, 36/14, 44/18 - other laws, 56/20 and 159/20 and 93/21)
7. Rulebook on the method of exercising the right to basic incentives in crop production and the request form for the exercise of those incentives ("Official Gazette of the RS", no. 29/13, 9/16, 44/18 - other laws, 38/20, 16 /21 and 18/22)
8. Rulebook on the conditions and method of exercising the right to incentives in animal husbandry for high-quality breeding cows ("Official Gazette of the RS", no. 26/17, 20/18, 34/18, 44/18 – Dr. Law, 104/18 and 24/21)
9. Rulebook on the conditions and method of exercising the right to incentives in animal husbandry for lactating cows ("Official Gazette of the RS", no. 46/15, 26/18 and 44/18 - other laws)
10. Rulebook on the conditions and method of exercising the right to incentives in animal husbandry for fattening cattle, fattening pigs, fattening lambs and fattening kids ("Official Gazette of the RS", no. 104/18 and 3/19)
11. Rulebook on the conditions and method of exercising the right to incentives in animal husbandry for cows for raising calves for fattening ("Official Gazette of the RS", no. 25/18 and 44/18 - other law)
12. Rulebook on the conditions and method of exercising the right to incentives in animal husbandry for lactating cows ("Official Gazette of the RS", no. 46/15, 26/18 and 44/18 – other law)
13. Rulebook on the conditions and method of exercising the right to incentives in animal husbandry by bee hive ("Official Gazette of the RS", no. 33/2015, 14/16, 20/18 - other laws 44/18, 27/19 and 76/ 20)
14. Rulebook on the method of exercising the right to incentives in animal husbandry for the production of edible fish ("Official Gazette of the RS", no. 61/13, 44/14 and 44/18 - other law)
15. Rulebook on the conditions, manner and forms of requests for exercising the right to recourse for the costs of storing agricultural products in public warehouses ("Official Gazette of the RS", number 61/13)
16. Rulebook on incentives for programs to improve competitiveness for investments in physical assets of agricultural holdings through support for the establishment of multi-year production plantations of fruit trees and hops ("Official Gazette of the RS", number 41/21) 3



17. Rulebook on incentives for investments in the physical property of agricultural holdings through support for the establishment of multi-year production vine plantations ("Official Gazette of the RS", no. 84/20 and 94/20)
18. Rulebook on incentives for investments in physical assets of agricultural holdings for the purchase of new machines and equipment for the improvement of primary production of plant crops ("Official Gazette of the RS", no. 48/18, 29/19, 78/20 and 119/21)
19. Rulebook on incentives for investments in the physical property of agricultural holdings for the purchase of new machines and equipment for the improvement of primary production in animal husbandry ("Official Gazette of the RS", no. 48/2018, 23/19, 78/20 and 119/21)
20. Rulebook on incentives for investments in physical assets of agricultural holdings for the purchase of new machines and equipment for the improvement of digitalization of livestock and agricultural production ("Official Gazette of the RS", no. 46/19, 87/20 and 9/22)
21. Rulebook on incentives for investments in physical assets of agricultural holdings for the acquisition of quality breeding heads for the improvement of primary livestock agricultural production ("Official Gazette of RS", no. 48/18, 29/19, 48/19 and 25/20)
22. Rulebook on incentives for investments in physical assets of agricultural holdings for the construction and equipping of facilities for the improvement of primary agricultural production ("Official Gazette of RS", no. 29/18, 30/18, 27/19, 40/19, 81/20 and 120/20)
23. Rulebook on incentives for investments in physical assets of agricultural holdings for the purchase of a new tractor ("Official Gazette of RS", no. 96/19 and 13/20)
24. Rulebook on incentives for investments in physical assets of agricultural holdings for field electrification ("Official Gazette of RS", number 25/20)
25. Rulebook on incentives for investment programs in agriculture to improve competitiveness and achieve quality standards through support for improving the quality of wine and brandy ("Official Gazette of the RS", No. 48/13, 33/16, 18/18 and 44/18 – Dr. . the law)
26. Rulebook on incentives for investments in the processing and marketing of agricultural and food products and fishery products for the procurement of equipment in the milk, meat, wine, beer and strong alcoholic beverages sector ("Official Gazette of RS", no. 35/19, 25/20 , 87/20 - other regulations and 133/20 - other regulations)
27. Rulebook on incentives for investments in the processing and marketing of agricultural and food products in the wine production sector ("Official Gazette of RS", no. 87/20 and 94/20)
28. Rulebook on incentives for investments in the processing and marketing of agricultural and food products in the sector of the production of strong alcoholic beverages ("Official Gazette of the RS", no. 133/20 and 27/22)
29. Rulebook on the conditions, manner and form of requests for exercising the right to incentives for insurance premiums for crops, fruits, perennial plants, nurseries and animals ("Official Gazette of the RS", no. 61/17 and 44/18 - other law)
30. Rulebook on the Use of Incentives for Organic Plant Production ("Official Gazette of the RS", no. 31/18, 23/19, 20/20 and 44/21)
31. Rulebook on the use of incentives for organic livestock production ("Official Gazette of RS", number 25/20)
32. Rulebook on incentives for the preservation of plant genetic resources ("Official Gazette of the RS", no. 85/13 and 44/18 - other law)
33. Rulebook on incentives for the preservation of animal genetic resources ("Official Gazette of the RS", no. 83/13, 35/15, 28/16, 44/18 - other laws, 104/18, 16/21 and 30/22 )

34. Rulebook on incentives for the preservation of animal genetic resources in the gene bank ("Official Gazette of RS", number 110/17)
35. Rulebook on the list of genetic reserves of domestic animals, the method of preserving the genetic reserves of domestic animals, as well as on the list of autochthonous breeds of domestic animals and endangered autochthonous breeds ("Official Gazette of RS", number 33/17, 104/21 and 30/22)
36. Rulebook on incentives for the improvement of economic activities in the countryside through support for non-agricultural activities ("Official Gazette of RS", number 93/21)
37. Rulebook on incentives for programs to diversify income and improve the quality of life in rural areas through support for young farmers ("Official Gazette of RS", no. 46/18, 50/18, 35/19 and 78/19)
38. Rulebook on incentives for the implementation of activities aimed at increasing competitiveness through the certification of food quality systems, organic products and products with geographical origin ("Official Gazette of RS", no. 39/18, 17/21, 132/21 and 27/22 )
39. Rulebook on incentives to support programs related to the preparation and implementation of local rural development strategies ("Official Gazette of RS", no. 3/19 and 159/20)
40. Rulebook on incentives for investments for the improvement and development of rural public infrastructure ("Official Gazette of RS", no. 67/21, 83/21, 125/21 and 10/22)
41. Rulebook on incentives for improving the system of creation and transfer of knowledge through the development of technical-technological, applied, developmental and innovative projects in agriculture and rural development ("Official Gazette of the RS", no. 76/20 and 18/22)
42. Rulebook on conditions and methods of exercising the right to credit support ("Official Gazette of the RS", no. 48/17, 88/17, 84/18, 23/19, 27/20, 36/21, 102/21 and 130 /21)
43. Regulation on financial support to agricultural holdings through easier access to the use of loans in difficult economic conditions due to the disease COVID-19 caused by the SARS-COV-2 virus ("Official Gazette of the RS", number 57/20)
44. Decree on determining the long-term program of measures for the implementation of the breeding program in the Republic of Serbia for the period 2020–2024. ("Official Gazette of RS", number 38/20)
45. Rulebook on the use of incentives for promotional activities in agriculture and rural development ("Official Gazette of RS", number 72/17)
46. Rulebook on incentives for the production of planting material and certification and clonal selection of fruit trees, vines and hops ("Official Gazette of RS", no. 58/17 and 25/18)
47. Rulebook on IPARD incentives for investments in physical assets of agricultural holdings ("Official Gazette of RS", no. 84/17, 112/17, 78/18, 67/19, 53/21, 10/22 and 18/22)
48. Rulebook on IPARD incentives for investments in physical assets related to the processing and marketing of agricultural and fishery products ("Official Gazette of RS", no. 84/17, 23/18, 98/18, 82/19, 74/21 and 10/22)
49. Rulebook on IPARD incentives for diversification of agricultural holdings and business development ("Official Gazette of RS", no. 76/20, 87/21 and 10/22)
50. Law on confirmation of the loan agreement (project for competitive agriculture) between the Republic of Serbia and the International Bank for Reconstruction and Development ("Official Gazette of RS - international agreements", number 2/20)
51. Rulebook on the allocation of grants within the project for competitive agriculture ("Official Gazette of the RS" No. 30/21 and 4/22) 52. Law on Agricultural Land ("Official Gazette of the RS", No. 62/06, 65/ 08- other laws, 41/09, 112/15, 80/17 and 95/18)