

WP7

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**DL7.2 IZVJEŠĆE O TRŽIŠNIM PODACIMA,  
TRENDOVIMA I PONAŠANJU POTROŠAČA  
EKOLOŠKIH PROIZVODA U ZEMLJAMA  
ZAPADNOG BALKANA (WBC)  
-Delphi metoda-**

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### REZULTATI 1. RUNDE DELPHY METODE ZA WBC

### REZULTATI 2. RUNDE DELPHY METODE ZA WBC

### ZAKLJUČCI

## DELPHI METODOLOGIJA

### Definicija Delphi metode

- **“Cilj Delphi metode je pouzdano i kreativno istraživanje ideja ili stvaranje odgovarajućih informacija za donošenje odluka”.**
- Metoda se uglavnom koristi za predviđanje u određenim područjima (ime je izvedeno prema gradu Delphi u Grčkoj poznatom po proročici). Delphi metoda je razvijena od Olafa Helmera and Normana Dalkeya iz Rand Corporation 1953. godine u svrhu rješavanja specifičnih vojnih problema.
- Svrha Delphi metode je postići pouzdane odgovore o određenom problemu od strane grupe eksperata. Proces vodi grupu eksperata prema koncenzusu.

### Glavni ciljevi

Delphi metoda je vrlo dobro prilagođena ciljevima ovog istraživanja i orijentirana je prema ključnim sudionicima na ovom tržištu. Osim toga dozvoljava ekspertima s njihove točke gledišta da sagledaju **dva glavna cilja ovog istraživanja:**

1. Trenutnu situaciju tržišta ekološke hrane u svakoj zemlji Zapadnog Balkana i
2. Predviđanja eksperata o razvoju tržišta ekološke hrane u svim zemljama Zapadnog Balkana

### Identifikacija i izbor eksperata

- Delphi metoda koristi panel eksperata.
- Članovi panela eksperata u svim zemljama WBC-a bili su izabrani na neformalni način.
- Pretpostavka je bila da u WBC nema mnogo eksperata iz području ekološke hrane ali je cilj ipak bio izabrati što veći broj eksperata iz različitih djelatnosti i područja djelovanja u svim zemljama Zapadnog Balkana.

### **Eksperti koji su sudjelovali u istraživanju čine tri kategorije:**

1. **Sudionici lanca opskrbe ekoloških proizvoda:** proizvođači, prerađivači, veletrgovci, maloprodavači, uvoznici i izvoznici.
2. **Regulatorne i neprofitne organizacije:** Državna tijela, Organizacije za certifikaciju, Instituti za javno zdravstvo, Agencije za hranu, Institucije za zaštitu potrošača
3. **Istraživači :** akademska javnost i privatne agencije

**Table 1 Sample characteristics of Delphi 1st and 2nd round**

	N° of experts		Gender		Institutions where experts are employed	How long Experts are involved in organic sector
	1 <sup>st</sup> round	2 <sup>nd</sup> round	Female	Male		
BOSNIA AND HERZEGOVINA	6	6	3	3	1.Public Health Institute 2.Ministry of Agriculture 3.Faculty of Agriculture 4.Private certified organic	5 - 10
CROATIA	8	8	6	2	1.Faculty of Agriculture 2.Faculty of Economics; 3.Food Agency4.Podravka5.Bio&Bio6.Konzum7.Ministry of Agriculture 8.Croatian Consumer Associat	5 - 30
MACEDONIA	4	3	3	1	1. Faculty of veterinary and medicine2.Ministry of agriculture 3.Organic farmer; 4.Certifying body.	10
MONTENEGRO	3	5	2	3	1.“Monteorganica” certification body 2.Ministry of Agriculture 3.Biotechnical Faculty Podgoric4.“Biomontenegro” NGO Healthy food production5.Agrovita Eco	5 -10
SERBIA	8	8	5	3	1.Ministry of Agriculture ; 2.Bioagricert, Belgrade; 3.Bioplanet, Belgrade; 4.Zdravo Organic d.o.o, 5.National Association of Organic Producers6.Biomarket Tartufo 7.US Embassy Belgrade 8.Association of agricultural producers	3 -10
SLOVENIA	10	14	6	8	1.Ministry of Agriculture; Certification body KON-CERT Maribor ; 3.Biotechnical Faculty; 4. Chamber of Agriculture 5.Agriculture Extension Service of Slovenia; 7.Union of Slovenian Organic Farmers Associations 8. MERCATOR d.d. ; 9.TUŠ 10. Organic shop “Kalček 11.Chamber of Agricultural and Food Enterprises12. IKC 13. Consumer Association Slovenia; 14. Biotechnical Centre Naklo	5 -15
<b>Total TOTAL</b>	<b>39</b>	<b>44</b>	<b>25</b>	<b>20</b>		

## Procedura i primjena Delphi metode

1. Identifikacija i izbor eksperata.

2. Definicija upitnika za 1 rundu.

3. Uvođenje eksperata u istraživani problem.

4. Prikupljanje individualnih mišljenja eksperata o istraživačkom problemu .

5. Priprema izvješća prve runde za svaku zemlju (partnera u projektu) nakon analize ispunjenih upitnika.

6. Runde se nastavljaju do prethodno određene razine koncenzusa i sve dok se više suglasnost ne može postići.

7. Univerzalno slaganje o razini konsenzusa u Delphi metodi ne postoji. Ono najviše ovisi o uzorku eksperata. McKenna predlaže da razina slaganja među ekspertima treba biti iznad 50 %, Sumsion predlaže 70 %, dok Green i dr. predlažu 80 %. Postoje brojna druga mišljenja i prijedlozi o tome.
8. Delphi koristi 3 do 4 runde (in 1978). Kasnija istraživanja pokazuju da su dovoljne 2 ili 3 runde (1994-1998). Najnovija istraživanja (Proctor&Hunt; Beach; Green i dr. u 2000.) pokazuju da je u većini slučajeva dovoljno provesti 2 runde. Broj rundi razlikuju se od slučaja do slučaja, a ovise broju eksperata, sadržaju pitanja, kompleksnosti problema koji se istražuje i dr.
9. Veličina panela eksperata najčešća je između 8 i 20. Za manje i slabije razvijene zemlje kao što su zemlje Zapadnog Balkana može biti između 4 i 12, zbog manjeg broja eksperata.



### Prednosti

- Interakcija u Delphi metodi je anonimna. Međusobna identifikacija eksperata je nemoguća.
- Može dovesti do slaganja kada to ostale metode nisu u mogućnosti.
- Dovoljno je vremena za odgovore, zbog čega eksperti mogu poboljšati snagu i stručnost svojih odgovora.
- Visoko je troškovno povoljna.
- Dozvoljava pristup grupi vrlo različitih eksperata.

### Nedostaci

- Ne postoje podaci o potpunoj pouzdanosti Delphi metode.
- Ne postoji konzistentna metoda za prikazivanje nalaza istraživanja. (Schmidt, 1997).
- Uzorak eksperata nije reprezentativan.
- Može zahtijevati dugo vremena za popunjavanje upitnika i dovršenje cijelog projekta.
- Postoji mogućnost nejasnoća s obzirom na veličinu uzorka i razinu konsenzusa.
- Izbor eksperata je apsolutno ključno pitanje.
- Konsenzus ne znači da su dobiveni podaci potpuno točni i istiniti.

## UPITNICI

### Runda 1- Upitnik

#### Ciljevi su:

- Opis postojeće situacije o proizvodnji i tržištu ekološke hrane, uključujući i povijest razvoja.
- Dobiti prve analize o razvoju tržišta ekološke hrane.
- Analizirati motive potrošača u potrošnji ekološke hrane.

Upitnici su bili distribuirani mailom. Istraživanje za 1 rundu je započelo krajem mjeseca travnja 2010. a završilo je početkom svibnja 2010.

### Runda 2 – Upitnik

Runda 2 – Upitnik je podijeljen u 6 različitih dijelova:

1. Utjecaj vlade i njezine politike
2. Proizvodnja
3. Tržište
4. Trendovi
5. Lanac opskrbe
6. Ponašanje potrošača

**Upitnici su bili distribuirani mailom. Istraživanje za 2. rundu je započelo krajem mjeseca veljače 2011. a završilo je početkom ožujka 2011.**

## UPITNICI

Ciljevi 2. runde su:

1. analizirati utjecaj vlade i njezinih mjera na sadašnji i budući razvoj ekološke poljoprivrede.
2. postojeći i budući interesi i motivi proizvođača da se preorijentiraju na ekološku proizvodnju.
3. ustanoviti odnos između postojeće i buduće ponude i potražnje ekološke hrane.
4. trendovi ekološke poljoprivrede s obzirom na stupanj razvoja svake zemlje, te mogućnosti za novi prihod i zapošljavanje.
5. istraživanje slabosti lanca opskrbe, posebice kanala distribucije u ponudi ekološke hrane.
6. analizirati motive potrošača i njihovo ponašanje prema ekološkoj hrani.

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## REZULTATI 1. RUNDE DELPHY METODE U WBC

Prema mišljenju eksperata dobiveni su sljedeći odgovori.

### 1. Najvažniji faktori koji su oblikovali razvoj tržišta ekološke hrane u WBC, u prošlosti su bili:

- Implementacija Nacionalnih i EU mjera i regulacija koje se odnose na proizvodnju, preradu i tržište ekološke hrane;
- inicijativa vlade da se certificira ekološka hrana i dodaju financijski poticaji farmerima u proizvodnji ekološke hrane.

## REZULTATI 1. RUNDE DELPHY METODE U WBC

- 2. Premda sve Zapadno Balkanske zemlje imaju dobre preduvjete za ekološku proizvodnju zbog nezagađene zemlje, tržište ekoloških proizvoda je u inicijalnoj fazi razvoja, iako su neke zemlje više a neke manje razvijene u tom smislu. Uspoređujući ih s razvijenim europskim zemljama, velika je razlika u proizvodnji i potrošnji.**
- 3. Većina zemalja izvozi sirovinu za proizvodnju ekološke hrane da bi uvozila finalne ekološke proizvode.**
- 4. Ponuda ekološke hrane, u smislu raznolikosti i količine je vrlo ograničena.**
- 5. Proizvođači nisu svjesni , a i nemaju znanja o proizvodnji ekološke hrane.**

## REZULTATI 1. RUNDE DELPHY METODE U WBC

6. Eksperti su svjesni mnogih povoljnih prilika za razvoj, kao što su: turizam, agro ekoturizam, nabava za javne institucije (škole, bolnice) internet, od vrata do vrata.
7. U sljedećih deset godina važnost ekološke hrane će rasti. Potrošači će više vjerovati domaćim i lokalnim proizvođačima najviše zbog toga jer ih je lakše kontrolirati. Ponuda će biti veće i šira, posebice u supermarketima.
8. Najvažniji motivi potrošača za kupovinu ekološke hrane su: zdravlje, prestiž i svjesnost o zaštiti okoliša.
9. Stanovništvo s višim prihodima, 25 do 40 godina starosti, dobro obrazovani su oni koji prezentiraju najvažniju grupu potrošača.



## REZULTATI 1. RUNDE DELPHY METODE U WBC

10. Potrošači trebaju biti **više informirani** o ekološkoj hrani. (posjećivati farme ekološke hrane, igrati se tamo s djecom i konzumirati svježu ekološku hranu).
11. U WBC **nedostaju uspješni distribucijski kanali**, prema mišljenju eksperata. Zbog toga bi trebalo intenzivirati kontakte između farmera i potrošača putem ne samo specijaliziranih prodavaonica nego i supermarketa te distributera koji se bave izvozom poljoprivrednih proizvoda.

## REZULTATI 2. RUNDE DELPHY METODE U WBC

2. runda Delphi metode se temelji na podacima iz 1. runde.

Upitnik je podijeljen u 6 različitih dijelova:

1. Utjecaj vlade i njezine politike
2. Proizvodnja
3. Tržište
4. Trendovi
5. Lanac opskrbe
6. Ponašanje potrošača

I sastoji se od 229 pitanja koja su kreirala vrlo detaljni i kompleksni upitnik.

Likertova skala (od 1-jako se ne slaže; 2-ne slaže se; 3- i slaže se i ne slaže; 4-slaže se; 5-jako se slaže) je primijenjena za svako pitanje.

Istraživanje je provedeno krajem veljače i početkom ožujka 2011. godine u svim zemljama Zapadnog Balkana.

## REZULTATI 2. RUNDE DELPHY METODE U WBC – 1. DIO

Table 2 Government & Policy Impact - WBC Present Situation

	N	MEAN	MEDIAN	MODE	Std. DEVIATION	Minimum	Maximum
Q1 Organic food market strongly depends on government initiatives.	44	3,5227	4,0000	4,00	1,15111	1,00	5,00
Q3 Regional / local government support is very important for the development of the organic agriculture.	44	4,2500	4,0000	4,00	,75097	1,00	5,00
Q5 Political support for the organic sector is strong enough. [Present situation]	43	2,3953	2,0000	2,00	1,13682	1,00	5,00
Q7 State incentives for organic production are adequate.	44	2,6364	2,0000	2,00	1,22172	1,00	5,00
Q9 The influence of the EU agriculture policy is pushing the organic farming in my country	44	3,5000	4,0000	4,00	,97647	1,00	5,00
Q11 The government should put special emphasis on the control system and certification	43	3,9767	4,0000	4,00	,96334	1,00	5,00
Q13 The government should impose barriers for organic products import	44	2,7273	2,0000	2,00	1,18839	1,00	5,00
Q15 State and local governments can significantly improve the market by buying organic food and products for school or hospital kitchens.	44	4,2500	4,5000	5,00	1,03710	1,00	5,00
Q17 National development strategy for organic farming is needed	44	4,3409	4,5000	5,00	,86113	1,00	5,00

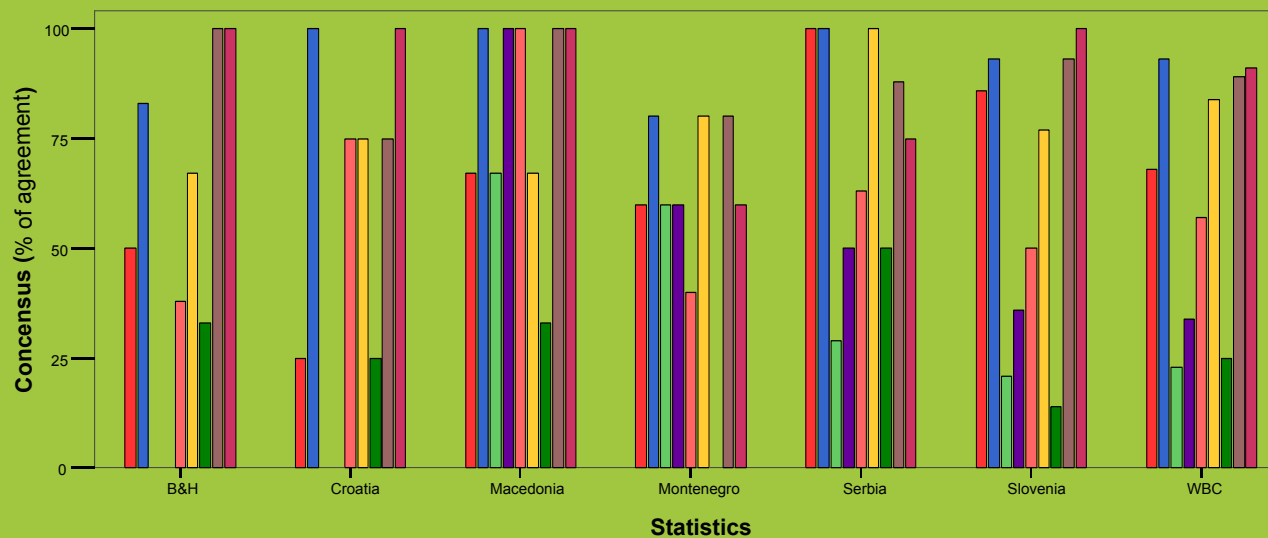
## REZULTATI 2. RUNDE DELPHY METODE U WBC - 1.DIO

**Table 3 Government & Policy Impact - WBC Present Situation (% of agreement)**

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q1 Organic food market strongly depends on government initiatives.	50	25	67	60	100	86	68
Q3 Regional / local government support is very important for the development of the organic agriculture.	83	100	100	80	100	93	93
Q5 Political support for the organic sector is strong enough.	0	0	67	60	29	21	23
Q7 State incentives for organic production are adequate.	0	0	100	60	50	36	34
Q9 The influence of the EU agriculture policy is pushing the organic farming in my country	38	75	100	40	63	50	57
Q11 The government should put special emphasis on the control system and certification	67	75	67	80	100	77	84
Q13 The government should impose barriers for organic products import	33	25	33	0	50	14	25
Q15 State and local governments can significantly improve the market by buying organic food and products for school or hospital kitchens.	100	75	100	80	88	93	89
Q17 National development strategy for organic farming is needed	100	100	100	60	75	100	91

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 1. DIO

Fig 1 Government & Policy Impact - WBC Present Situation (% of agreement)



- Variables**
- Q1 Organic food market strongly depends on government initiatives.
  - Q3 Regional / local government support is very important for the development of the organic agriculture.
  - Q5 Political support for the organic sector is strong enough.
  - Q7 State incentives for organic production are adequate.
  - Q9 The influence of the EU agriculture policy is pushing the organic farming in my country
  - Q11 The government should put special emphasis on the control system and certification
  - Q13 The government should impose barriers for organic products import
  - Q15 State and local governments can significantly improve the market by buying organic food and products for school or hospital kitchens.
  - Q17 National development strategy for organic farming is needed

## REZULTATI 2. RUNDE DELPHY METODE U WBC - 1. DIO

**Table 4 Government & Policy Impact - WBC Future (5 years) Prediction**

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Valid						
Q2 Organic food market strongly depends on government initiatives.	44	3,5227	4,0000	4,00	,92733	1,00	5,00
Q4 Regional / local government support is very important for the development of the organic agriculture	44	4,1818	4,0000	4,00	,84283	1,00	5,00
Q6 Political support for the organic sector is strong enough	43	2,7674	3,0000	3,00	1,01974	1,00	5,00
Q8 State incentives for organic production are adequate	43	2,8140	3,0000	3,00	1,05234	1,00	5,00
Q10 The influence of the EU agriculture policy is pushing the organic farming in my country	44	3,7500	4,0000	4,00	,99124	1,00	5,00
Q12 The government should put special emphasis on the control system and certification	43	4,0233	4,0000	4,00	,93830	1,00	5,00
Q14 The government should impose barriers for organic products import	44	2,8636	3,0000	2,00	1,19283	1,00	5,00
Q16 State and local governments can significantly improve the market by buying organic food and products for school or hospital kitchens	44	4,2727	5,0000	5,00	1,04244	1,00	5,00
Q18 National development strategy for organic farming is needed	44	4,3409	4,0000	5,00	,80531	1,00	5,00

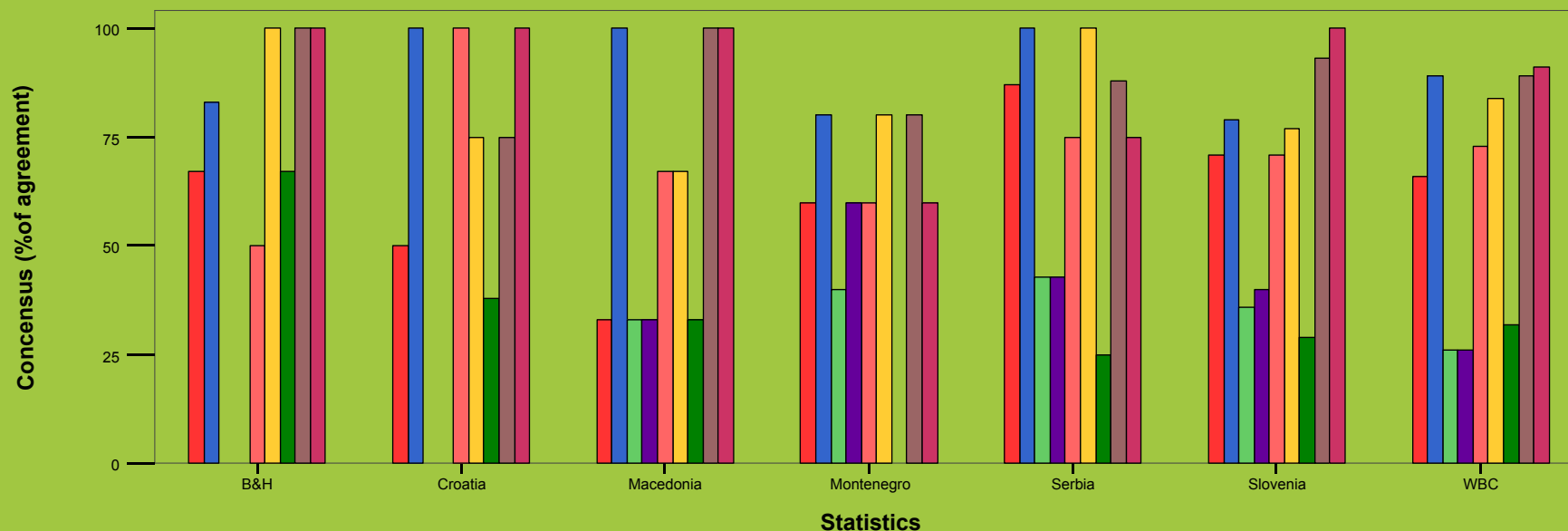
## REZULTATI 2. RUNDE DELPHY METODE WBC - 1. DIO

Table 5 Government & Policy Impact - WBC Future (5 years) Prediction

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q2 Organic food market strongly depends on government initiatives.	67	50	33	60	87	71	66
Q4 Regional / local government support is very important for the development of the organic agriculture	83	100	100	80	100	79	89
Q6 Political support for the organic sector is strong enough	0	0	33	40	43	36	26
Q8 State incentives for organic production are adequate	0	0	33	60	43	40	26
Q10 The influence of the EU agriculture policy is pushing the organic farming in my country	50	100	67	60	75	71	73
Q12 The government should put special emphasis on the control system and certification	100	75	67	80	100	77	84
Q14 The government should impose barriers for organic products import	67	38	33	0	25	29	32
Q16 State and local governments can significantly improve the market by buying organic food and products for school or hospital kitchens	100	75	100	80	88	93	89
Q18 National development strategy for organic farming is needed	100	100	100	60	75	100	91

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 1. DIO

Fig 2 Government & Policy Impact - WBC Future (5 years) Prediction



- Variables**
- Q2 Organic food market strongly depends on government initiatives.
  - Q4 Regional / local government support is very important for the development of the organic agriculture
  - Q6 Political support for the organic sector is strong enough
  - Q8 State incentives for organic production are adequate
  - Q10 The influence of the EU agriculture policy is pushing the organic farming in my country
  - Q12 The government should put special emphasis on the control system and certification
  - Q14 The government should impose barriers for organic products import
  - Q16 State and local governments can significantly improve the market by buying organic food and products for school or hospital kitchens
  - Q18 National development strategy for organic farming is needed



## REZULTATI 2. RUNDE DELPHY METODE U WBC - 2. DIO

**Table 6 Production - WBC Present Situation**

	N	MEAN	MEDIAN	MODE	Std. DEVIATION	Minimum	Maximum
	Valid						
Q19 It is easy to convert low input traditional into organic production.	44	3,1591	3,0000	2,00	1,25648	1,00	5,00
Q21 The motivation of the producers themselves is important for the development of the organic sector	44	4,3182	4,0000	4,00	,70785	1,00	5,00
Q23 The development of organic production is hindered by the difficulty for organic producers to obtain organic seeds or other inputs they need to respect the code of practice.	42	3,5952	4,0000	4,00	1,01356	1,00	5,00
Q25 Financial consolidation of organic farms is necessary to enhance organic farming.	43	4,0233	4,0000	4,00	,70672	1,00	5,00
Q27 The interest of producers to convert to organic production is increasing	44	3,6364	4,0000	4,00	,91730	1,00	5,00
Q29 Organic farming sector is growing in my country, despite the economic crisis.	43	3,4186	4,0000	4,00	,98156	1,00	5,00
Q31 Teaching and training for organic farming is necessary to increase the number of new organic farmers	44	4,4091	5,0000	5,00	,81606	1,00	5,00
Q33 Export opportunities strongly influence organic agriculture in my country.	43	3,4419	4,0000	4,00	1,16092	1,00	5,00
Q35 Producers and processors are motivated to produce more organic food if market information about supply, demand, prices, and export opportunities is available easily for them	44	3,9545	4,0000	4,00	,96339	1,00	5,00
Q37 Horizontal cooperation between organic farmers and pooling of the organic production are required.	43	2,5581	2,0000	2,00	1,03054	1,00	5,00
Q39 Farmers are motivated to switch to organic farming because of the higher product prices	44	3,8182	4,0000	4,00	,92190	1,00	5,00
Q41 Farmers are motivated to switch to organic farming because of the better market situation	44	3,5000	4,0000	4,00	,97647	1,00	5,00
Q43 Farmers are motivated to switch to organic farming because of the better link to supply chain	42	3,2619	3,0000	4,00	1,23089	1,00	5,00
Q45 Farmers are motivated to switch to organic farming because of the better consumer contacts	44	3,4545	4,0000	4,00	1,08809	1,00	5,00
Q47 Farmers are motivated to switch to organic farming because of the higher subsidies	44	4,0682	4,0000	4,00	,87332	1,00	5,00

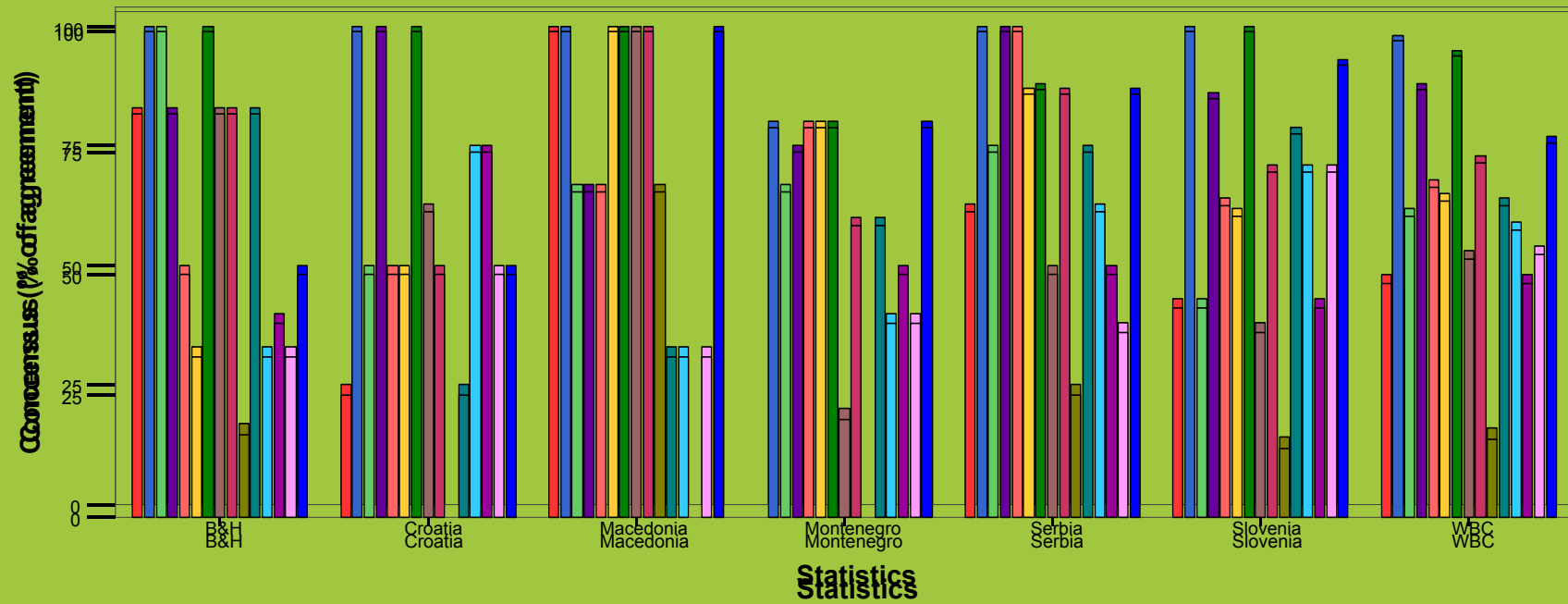
## REZULTATI 2. RUNDE DELPHY METODE U WBC - 2. DIO

Table 7 Production - WBC Present Situation

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q19 It is easy to convert low input traditional into organic production.	83	25	100	0	63	43	48
Q21 The motivation of the producers themselves is important for the development of the organic sector	100	100	100	80	100	100	98
Q23 The development of organic production is hindered by the difficulty for organic producers to obtain organic seeds or other inputs they need to respect the code of practice.	100	50	67	67	75	43	62
Q25 Financial consolidation of organic farms is necessary to enhance organic farming.	83	100	67	75	100	86	88
Q27 The interest of producers to convert to organic production is increasing	50	50	67	80	100	64	68
Q29 Organic farming sector is growing in my country, despite the economic crisis.	33	50	100	80	87	62	65
Q31 Teaching and training for organic farming is necessary to increase the number of new organic farmers	100	100	100	80	88	100	95
Q33 Export opportunities strongly influence organic agriculture in my country.	83	63	100	20	50	38	53
Q35 Producers and processors are motivated to produce more organic food if market information about supply, demand, prices, and export opportunities is available easily for them	83	50	100	60	87	71	73
Q37 Horizontal cooperation between organic farmers and pooling of the organic production are required.	17	0	67	0	25	14	16
Q39 Farmers are motivated to switch to organic farming because of the higher product prices	83	25	33	60	75	79	64
Q41 Farmers are motivated to switch to organic farming because of the better market situation	33	75	33	40	63	71	59
Q43 Farmers are motivated to switch to organic farming because of the better link to supply chain	40	75	0	50	50	43	48
Q45 Farmers are motivated to switch to organic farming because of the better consumer contacts	33	50	33	40	38	71	54
Q47 Farmers are motivated to switch to organic farming because of the higher subsidies	50	50	100	80	87	93	77

# DELPHY 2nd ROUND RESULTS IN WBC-Part 2

## Fig 3 Production - WBC Present Situation



### Variables

- Q19 It is easy to convert low input traditional into organic production.
- Q21 Motivation of producers themselves is important ...
- Q23 Development of org. is hindered by difficulty to obtain seeds ...
- Q25 Financial consolidation of organic farms is necessary to enhance organic farming.
- Q27 The interest of producers to convert to organic production is increasing.
- Q29 Organic farming sector is growing in my country, despite the economic crisis.
- Q31 Teaching and training for organic farming is necessary.
- Q33 Export opportunities strongly influence organic agriculture in my country.
- Q35 Producers and processors are motivated to produce more if market information is available easily.
- Q37 Horizontal cooperation between organic farmers and pooling of the organic production are required.
- Q39 Farmers are motivated to switch to organic farming because of the higher product prices.
- Q41 Farmers are motivated to switch to organic farming because of the better market situation.
- Q43 Farmers are motivated to switch to organic farming because of the better link to supply chain.
- Q45 Farmers are motivated to switch to organic farming because of the better consumer contacts.
- Q47 Farmers are motivated to switch to organic farming because of the higher subsidies.



## REZULTATI 2. RUNDE DELPHY METODE U WBC - 2. DIO

**Table 8 Production - WBC Future (5 years) Prediction**

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Valid						
Q20 It is easy to convert low input traditional into organic production.	44	3,3864	4,0000	4,00	1,24295	1,00	5,00
Q22 The motivation of the producers themselves is important for the development of the organic sector	44	4,3636	4,0000	4,00	,71823	1,00	5,00
Q24 The development of organic production is hindered by the difficulty for organic producers to obtain organic seeds or other inputs they need to respect the code of practice	42	3,4048	3,5000	4,00	,93859	1,00	5,00
Q26 Financial consolidation of organic farms is necessary to enhance organic farming	43	3,9767	4,0000	4,00	,70672	1,00	5,00
Q28 The interest of producers to convert to organic production is increasing	44	3,8409	4,0000	4,00	,91355	1,00	5,00
Q30 Organic farming sector is growing in my country, despite the economic crisis	43	3,5116	4,0000	4,00	,93534	1,00	5,00
Q32 Teaching and training for organic farming is necessary to increase the number of new organic farmers	44	4,5227	5,0000	5,00	,73100	1,00	5,00
Q34 Export opportunities strongly influence organic agriculture in my country	43	3,6977	4,0000	4,00	1,10270	1,00	5,00
Q36 Producers and processors are motivated to produce more organic food if market information about supply, demand, prices, and export opportunities is available easily for them	44	4,0227	4,0000	4,00	,90190	1,00	5,00
Q38 Horizontal cooperation between organic farmers and pooling of the organic production are required	42	2,7619	3,0000	2,00	,95788	1,00	5,00
Q40 Farmers are motivated to switch to organic farming because of the higher product prices	44	3,9545	4,0000	4,00	,74567	1,00	5,00
Q42 Farmers are motivated to switch to organic farming because of the better market situation	44	3,9318	4,0000	4,00	,84627	1,00	5,00
Q44 Farmers are motivated to switch to organic farming because of the better link to supply chain	43	3,8837	4,0000	4,00	,95641	1,00	5,00
Q46 Farmers are motivated to switch to organic farming because of the better consumer contacts	44	4,0227	4,0000	4,00	,97620	1,00	5,00
Q48 Farmers are motivated to switch to organic farming because of the higher subsidies	44	4,1818	4,0000	4,00	,86998	1,00	5,00

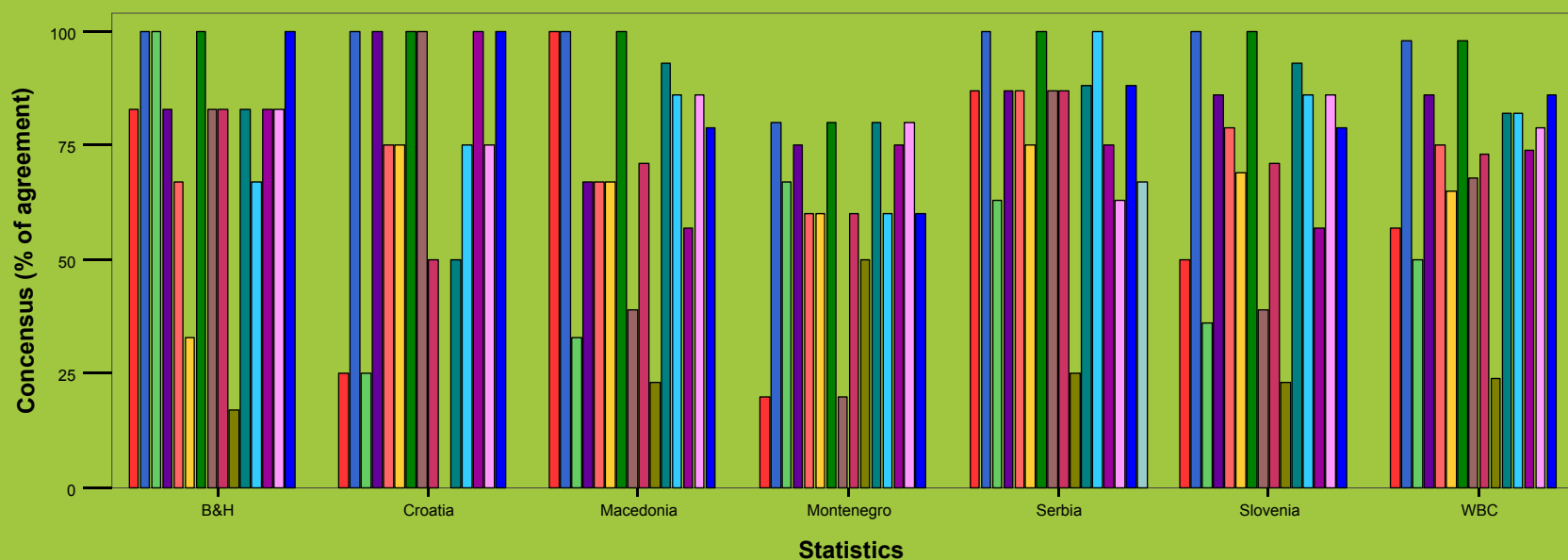
# REZULTATI 2. RUNDE DELPHY METODE U WBC - 2. DIO

Table 9 Production - WBC Future (5 years) Prediction

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q20 It is easy to convert low input traditional into organic production.	83	25	100	20	87	50	57
Q22 The motivation of the producers themselves is important for the development of the organic sector	100	100	100	80	100	100	98
Q24 The development of organic production is hindered by the difficulty for organic producers to obtain organic seeds or other inputs they need to respect the code of practice	100	25	33	67	63	36	50
Q26 Financial consolidation of organic farms is necessary to enhance organic farming	83	100	67	75	87	86	86
Q28 The interest of producers to convert to organic production is increasing	67	75	67	60	87	79	75
Q30 Organic farming sector is growing in my country, despite the economic crisis	33	75	67	60	75	69	65
Q32 Teaching and training for organic farming is necessary to increase the number of new organic farmers	100	100	100	80	100	100	98
Q34 Export opportunities strongly influence organic agriculture in my country	83	100	39	20	87	39	68
Q36 Producers and processors are motivated to produce more organic food if market information about supply, demand, prices, and export opportunities is available easily for them	83	50	71	60	87	71	73
Q38 Horizontal cooperation between organic farmers and pooling of the organic production are required	17	0	23	50	25	23	24
Q40 Farmers are motivated to switch to organic farming because of the higher product prices	83	50	93	80	88	93	82
Q42 Farmers are motivated to switch to organic farming because of the better market situation	67	75	86	60	100	86	82
Q44 Farmers are motivated to switch to organic farming because of the better link to supply chain	83	100	57	75	75	57	74
Q46 Farmers are motivated to switch to organic farming because of the better consumer contacts	83	75	86	80	63	86	79
Q48 Farmers are motivated to switch to organic farming because of the higher subsidies	100	100	79	60	88	79	86

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 2. DIO

Fig 4 Production - WBC Future (5 years) Prediction



- Variables**
- Q20 It is easy to convert low input traditional into organic production.
  - Q22 The motivation of the producers themselves is important for the development of the organic sector
  - Q24 The development of organic production is hindered by the difficulty to obtain organic seeds ... need
  - Q26 Financial consolidation of organic farms is necessary to enhance organic farming
  - Q28 The interest of producers to convert to organic production is increasing
  - Q30 Organic farming sector is growing in my country, despite the economic crisis
  - Q32 Teaching and training for organic farming is necessary to increase the number of new organic farmers
  - Q34 Export opportunities strongly influence organic agriculture in my country
  - Q36 Producers are motivated to produce more if market informations on (supply, demand...) are easily available
  - Q38 Horizontal cooperation between organic farmers and pooling of the organic production are required
  - Q40 Farmers are motivated to switch to organic farming because of the higher product prices
  - Q42 Farmers are motivated to switch to organic farming because of the better market situation
  - Q44 Farmers are motivated to switch to organic farming because of the better link to supply chain
  - Q46 Farmers are motivated to switch to organic farming because of the better consumer contacts
  - Q48 Farmers are motivated to switch to organic farming because of the higher subsidies
  - p50 Farmers are motivated to switch to organic farming because of the (Other) - Future 5 years prediction

## REZULTATI 2. RUNDE DELPHY METODE U WBC - 3. DIO

**Table 10 Market - WBC Present Situation**

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Valid						
Q51 Market of certain categories of organic products is meat	43	1,8372	2,0000	2,00	,81446	1,00	4,00
Q53 Market of certain categories of organic products is milk	43	2,3721	2,0000	3,00	1,13438	1,00	5,00
Q55 Market of certain categories of organic products is fruit	43	2,9070	3,0000	3,00	,94652	1,00	4,00
Q57 Market of certain categories of organic products is vegetable	43	3,0233	3,0000	4,00	,98774	1,00	5,00
Q59 Market of certain categories of organic products is cereal	42	2,9524	3,0000	3,00	,96151	1,00	4,00
Q61 Market of certain categories of organic products is baby food	43	2,2558	2,0000	2,00	1,07111	1,00	4,00
Q65 Imported organic products dominate the organic market.	44	3,4773	4,0000	4,00	1,02273	1,00	5,00
Q67 Low prices of imported organic products lower the prices on domestic organic market.	43	2,8372	3,0000	2,00	1,04495	1,00	5,00
p69 Distributors (wholesalers, importers, retailers) have more bargain power than producers.	43	4,1860	4,0000	4,00	,85233	1,00	5,00
Q71 Promotion of organic products is at low level.	43	3,9302	4,0000	4,00	,91014	1,00	5,00
Q73 Organic market development in WBC follows the market development elsewhere.	44	3,0455	3,0000	3,00	1,05554	1,00	5,00
Q75 Clear labelling of organic products enhances market development.	44	4,0455	4,0000	4,00	,77623	1,00	5,00
Q78 Offer and demand of the organic market are well balanced.	44	1,6364	1,0000	1,00	1,47996	1,00	5,00
Q79 The organic market is increasing	44	4,6364	5,0000	5,00	,78031	3,00	5,00
Q80 Market for organic products in certain areas is _Urban in middle towns	44	2,9318	3,0000	4,00	1,10806	1,00	5,00
Q82 Market for organic products in certain areas is _Urban in touristic towns	44	2,7727	3,0000	3,00	1,03122	1,00	5,00
Q84 Market for organic products in certain areas is _Rural in touristic areas	44	2,3864	2,0000	2,00	,99337	1,00	4,00
Q86 Market for organic products in certain areas is _Rural in remoted areas	44	2,0227	2,0000	1,00	1,02273	1,00	5,00
Q88 Market for organic products in certain areas is _Rural close to urban centers	44	2,3409	2,0000	3,00	,96311	1,00	4,00

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 3. DIO

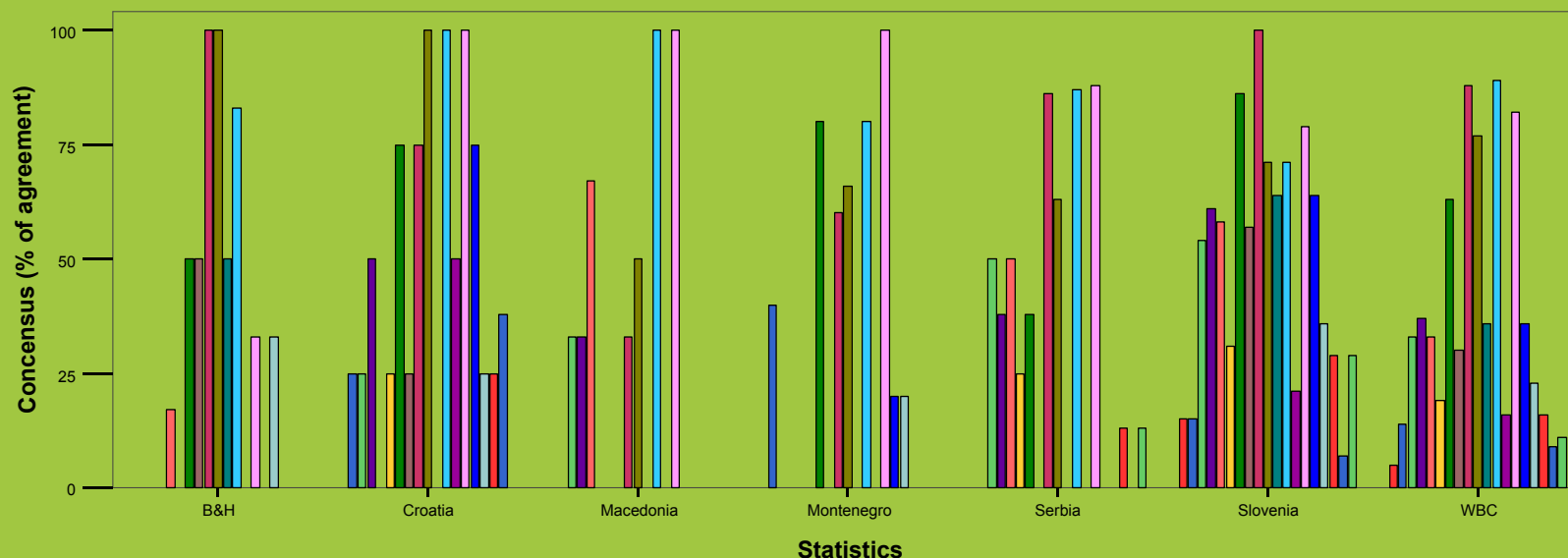
Table 11 Market - WBC Present Situation

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q51 Market of certain categories of organic products is meat	0	0	0	0	0	15	5
Q53 Market of certain categories of organic products is milk	0	25	0	40	0	15	14
Q55 Market of certain categories of organic products is fruit	0	25	33	0	50	54	33
Q57 Market of certain categories of organic products is vegetable	0	50	33	0	38	61	37
Q59 Market of certain categories of organic products is cereal	17	0	67	0	50	58	33
Q61 Market of certain categories of organic products is baby food	0	25	0	0	25	31	19
Q65 Imported organic products dominate the organic market.	50	75	0	80	38	86	63
Q67 Low prices of imported organic products lower the prices on domestic organic market.	50	25	0	0	0	57	30
Q69 Distributors (wholesalers, importers, retailers) have more bargain power than producers.	100	75	33	60	86	100	88
Q71 Promotion of organic products is at low level.	100	100	50	66	63	71	77
Q73 Organic market development in WBC follows the market development elsewhere.	50	0	0	0	0	64	36
Q75 Clear labelling of organic products enhances market development.	83	100	100	80	87	71	89
Q78 Offer and demand of the organic market are well balanced.	0	50	0	0	0	21	16
Q79 The organic market is increasing	33	100	100	100	88	79	82
Q80 Market for organic products in certain areas is _Urban in middle towns	0	75	0	20	0	64	36
Q82 Market for organic products in certain areas is _Urban in touristic towns	33	25	0	20	0	36	23
Q84 Market for organic products in certain areas is _Rural in touristic areas	0	25	0	0	13	29	16
Q86 Market for organic products in certain areas is _Rural in remoted areas	0	38	0	0	0	7	9
Q88 Market for organic products in certain areas is _Rural close to urban centers	0	0	0	0	13	29	11



# REZULTATI 2. RUNDE DELPHY METODE U WBC - 3. DIO

Fig 5 Market - WBC Present Situation



### Variables

- Q51 Market of certain categories of organic products is meat
- Q53 Market of certain categories of organic products is milk
- Q55 Market of certain categories of organic products is fruit
- Q57 Market of certain categories of organic products is vegetables
- Q59 Market of certain categories of organic products is cereal
- Q61 Market of certain categories of organic products is baby food
- Q65 Imported organic products dominate the organic market.
- Q67 Low prices of imported organic products lower the prices on domestic organic market
- Q69 Distributors (wholesalers, importers, retailers) have more bargaining power than producers
- Q71 Promotion of organic products is at low level.
- Q73 Organic market development in WBC follows the market development elsewhere.
- Q75 Clear labelling of organic products enhances market development.
- Q77 Offer and demand of the organic market are well balanced.
- Q78 Offer and demand of the organic market are well balanced.
- Q79 The organic market is increasing
- Q80 Market for organic products in certain areas is\_Urban in middle towns
- Q82 Market for organic products in certain areas is\_Urban in touristic towns
- Q84 Market for organic products in certain areas is\_Rural in touristic areas
- Q86 Market for organic products in certain areas is\_Rural in remotest areas
- Q88 Market for organic products in certain areas is\_Rural close to urban centers

## REZULTATI 2. RUNDE DELPHY METODE U WBC - 3. DIO

**Table 12 Market WBC Future (5year) Prediction**

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Q52 Market of certain categories of organic products is meat	43	2,7209	2,0000	2,00	,93416	1,00
Q54 Market of certain categories of organic products is milk	43	3,0698	3,0000	4,00	1,09968	1,00	5,00
Q56 Market of certain categories of organic products is fruit	43	3,6279	4,0000	4,00	1,04707	1,00	5,00
Q58 Market of certain categories of organic products is vegetable	43	3,7209	4,0000	4,00	1,03108	1,00	5,00
Q60 Market of certain categories of organic products is cereal	43	3,6047	4,0000	4,00	1,04971	1,00	5,00
Q62 Market of certain categories of organic products is baby food	43	3,2326	3,0000	4,00	1,17184	1,00	5,00
Q66 Imported organic products dominate the organic market	44	3,3864	3,0000	4,00	,92046	1,00	5,00
Q68 Low prices of imported organic products lower the prices on domestic organic market	41	3,0732	3,0000	2,00	1,05807	1,00	5,00
Q70 Distributors (wholesalers, importers, retailers) have more bargain power than producers	43	4,0000	4,0000	4,00	,89974	1,00	5,00
Q72 Promotion of organic products is at low level	43	3,3721	4,0000	4,00	,97647	1,00	5,00
Q74 Organic market development in WBC follows the market development elsewhere	44	3,2955	3,0000	3,00	,87815	1,00	5,00
Q76 Clear labelling of organic products enhances market development	44	4,2500	4,0000	4,00	,81054	1,00	5,00
Q81 Market for organic products in certain areas is_Urban in middle towns	44	3,7045	4,0000	4,00	1,00185	1,00	5,00
Q83 Market for organic products in certain areas is_Urban in touristic towns	44	3,5909	4,0000	4,00	1,01885	1,00	5,00
Q85 Market for organic products in certain areas is_Rural in touristic areas	44	3,4318	4,0000	4,00	1,16933	1,00	5,00
Q87 Market for organic products in certain areas is_Rural in remoted areas	44	2,4318	2,0000	2,00	1,10806	1,00	4,00
Q89 Market for organic products in certain areas is_Rural close to urban centers	43	3,1628	3,0000	4,00	1,11120	1,00	5,00

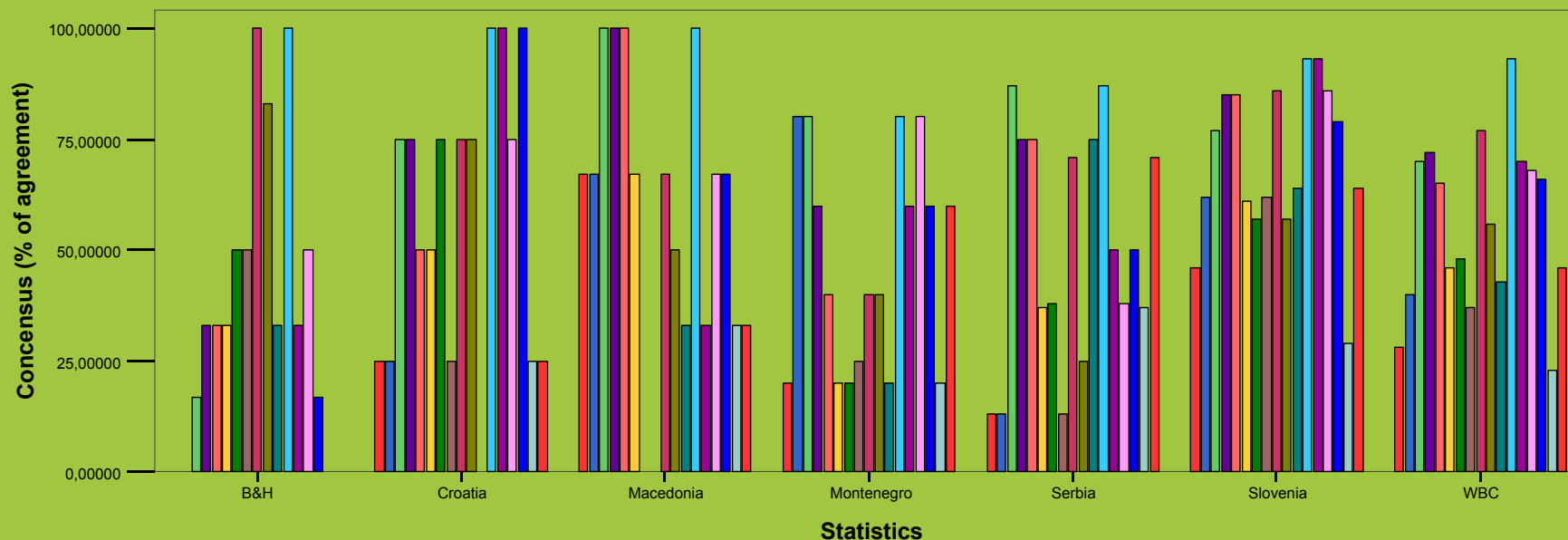
## REZULTATI 2. RUNDE DELPHY METODE U WBC - 3. DIO

Table 13 Market WBC Future (5year) Prediction

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q52 Market of certain categories of organic products is meat	0	25	67	20	13	46	28
Q54 Market of certain categories of organic products is milk	0	25	67	80	13	62	40
Q56 Market of certain categories of organic products is fruit	17	75	100	80	87	77	70
Q58 Market of certain categories of organic products is vegetable	33	75	100	60	75	85	72
Q60 Market of certain categories of organic products is cereal	33	50	100	40	75	85	65
Q62 Market of certain categories of organic products is baby food	33	50	67	20	37	61	46
Q66 Imported organic products dominate the organic market	50	75	0	20	38	57	48
Q68 Low prices of imported organic products lower the prices on domestic organic market	50	25	0	25	13	62	37
Q70 Distributors (wholesalers, importers, retailers) have more bargain power than producers	100	75	67	40	71	86	77
Q72 Promotion of organic products is at low level	83	75	50	40	25	57	56
Q74 Organic market development in WBC follows the market development elsewhere	33	0	33	20	75	64	43
Q76 Clear labelling of organic products enhances market development	100	100	100	80	87	93	93
Q81 Market for organic products in certain areas is_Urban in middle towns	33	100	33	60	50	93	70
Q83 Market for organic products in certain areas is_Urban in touristic towns	50	75	67	80	38	86	68
Q85 Market for organic products in certain areas is_Rural in touristic areas	17	100	67	60	50	79	66
Q87 Market for organic products in certain areas is_Rural in remoted areas	0	25	33	20	37	29	23
Q89 Market for organic products in certain areas is_Rural close to urban centers	0	25	33	60	71	64	46

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 3.DIO

Fig 6 Market WBC Future (5year) Prediction



### Variables

- Q52 Market of certain categories of organic products is meat
- Q54 Market of certain categories of organic products is milk
- Q56 Market of certain categories of organic products is fruit
- Q58 Market of certain categories of organic products is vegetable
- Q60 Market of certain categories of organic products is cereal
- Q62 Market of certain categories of organic products is baby food
- Q66 Imported organic products dominate the organic market
- Q68 Low prices of imported organic products lower the prices on domestic organic market
- Q70 Distributors (wholesalers, importers, retailers) have more bargain power than producers
- Q72 Promotion of organic products is at low level
- Q74 Organic market development in WBC follows the market development elsewhere
- Q76 Clear labelling of organic products enhances market development
- Q81 Market for organic products in certain areas is\_Urban in middle towns
- Q83 Market for organic products in certain areas is\_Urban in touristic towns
- Q85 Market for organic products in certain areas is\_Rural in touristic areas
- Q87 Market for organic products in certain areas is\_Rural in remoted areas
- Q89 Market for organic products in certain areas is\_Rural close to urban centers

## REZULTATI 2. RUNDE DELPHY METODE U WBC - 4. DIO

**Table 14 Trends WBC Present Situation**

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
Q90 Organic farming will spread in all WBC countries.	43	3,2093	3,0000	3,00	,91439	2,00	5,00
Q92 Eco tourism is important for the development of this form of agriculture.	42	4,0238	4,0000	4,00	,64347	2,00	5,00
Q94 Agro tourism is important for the development of this form of agriculture.	43	3,8140	4,0000	4,00	,76394	2,00	5,00
Q96 Mountain tourism is important for the development of this form of agriculture.	43	3,7442	4,0000	4,00	,84777	2,00	5,00
Q98 Health tourism is important for the development of this form of agriculture.	43	3,8140	4,0000	4,00	,82392	2,00	5,00
Q102 Media (including internet) is important for development of organic market in my country	43	3,6744	4,0000	4,00	,91862	2,00	5,00
Q104 Activities of non-governmental organizations (national and international) are important for the development of the organic sector.	43	3,8140	4,0000	4,00	1,05234	1,00	5,00
Q106 The organic market development depends on the general level of wealth.(Present situation)	43	4,1163	4,0000	4,00	,62524	2,00	5,00
Q108 Organic farming is a success factor for agricultural sector in all the WBC countries	43	3,2326	3,0000	4,00	,81174	2,00	5,00
Q110 Initiatives in organic production play a key role in preserving jobs in rural areas	42	3,4762	4,0000	4,00	,80359	2,00	5,00
Q112 The organic sector brings about new possibilities for income and labor.	43	4,1628	4,0000	4,00	,61452	3,00	5,00
Q114 The organic sector supports the economy in rural areas.	43	3,6744	4,0000	4,00	,83726	2,00	5,00
Q116 Importance for the development of organic sector_new technology	43	3,6512	4,0000	4,00	,94827	1,00	5,00
Q118 Importance for the development of organic sector_risk venture capital	42	3,8333	4,0000	4,00	,69551	2,00	5,00
Q120 Importance for the development of organic sector_vertical cooperation	42	4,0714	4,0000	4,00	,77752	2,00	5,00
Q122 Importance for the development of organic sector_definition of strategy	43	4,1628	4,0000	5,00	,99834	2,00	5,00
Q126 The marketing for organic products (in the sense of strategic, operational, 4 P - marketing) has to be improved.	42	4,3810	4,0000	5,00	,69677	2,00	5,00

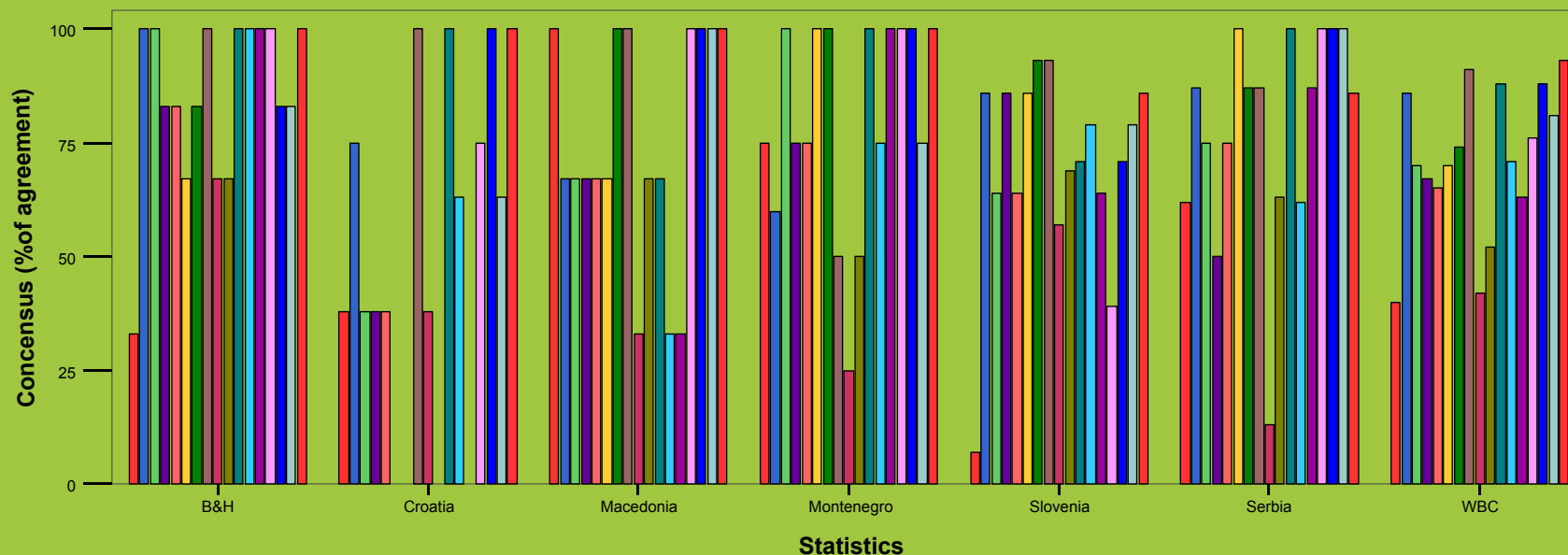
## REZULTATI 2. RUNDE DELPHY METODE U WBC - 4. DIO

Table 15 Trends WBC Present Situation

	B&H	Croatia	Macedonia	Montenegro	Slovenia	Serbia	WBC
Q90 Organic farming will spread in all WBC countries.	33	38	100	75	7	62	40
Q92 Eco tourism is important for the development of this form of agriculture.	100	75	67	60	86	87	86
Q94 Agro tourism is important for the development of this form of agriculture.	100	38	67	100	64	75	70
Q96 Mountain tourism is important for the development of this form of agriculture.	83	38	67	75	86	50	67
Q98 Health tourism is important for the development of this form of agriculture.	83	38	67	75	64	75	65
Q102 Media (including internet) is important for development of organic market in my country	67	0	67	100	86	100	70
Q104 Activities of non-governmental organizations (national and international) are important for the development of the organic sector.	83	0	100	100	93	87	74
Q106 The organic market development depends on the general level of wealth. (Present situation)	100	100	100	50	93	87	91
Q108 Organic farming is a success factor for agricultural sector in all the WBC countries	67	38	33	25	57	13	42
Q110 Initiatives in organic production play a key role in preserving jobs in rural areas	67	0	67	50	69	63	52
Q112 The organic sector brings about new possibilities for income and labor.	100	100	67	100	71	100	88
Q114 The organic sector supports the economy in rural areas.	100	63	33	75	79	62	71
Q116 Importance for the development of organic sector_new technology	100	0	33	100	64	87	63
Q118 Importance for the development of organic sector_risk venture capital	100	75	100	100	39	100	76
Q120 Importance for the development of organic sector_vertical cooperation	83	100	100	100	71	100	88
Q122 Importance for the development of organic sector_definition of strategy	83	63	100	75	79	100	81
Q126 The marketing for organic products (in the sense of strategic, operational, 4 P - marketing) has to be improved.	100	100	100	100	86	86	93

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 4. DIO

Fig 7 Trends WBC Present Situation



### Variables

- Q90 Organic farming will spread in all WBC countries.
- Q92 Eco tourism is important for the development of this form of agriculture.
- Q94 Agro tourism is important for the development of this form of agriculture.
- Q96 Mountain tourism is important for the development of this form of agriculture.
- Q98 Health tourism is important for the development of this form of agriculture.
- Q102 Media (including internet) is important for development of organic market in my country
- Q104 Activities of non-governmental organizations (national and international) are important
- Q106 The organic market development depends on the general level of wealth.(Present situa
- Q108 Organic farming is a success factor for agricultural sector in all the WBC countries
- Q110 Initiatives in organic production play a key role in preserving jobs in rural areas
- Q112 The organic sector brings about new possibilities for income and labor.
- Q114 The organic sector supports the economy in rural areas.
- Q116 Importance for the development of organic sector\_new technology
- Q118 Importance for the development of organic sector\_risk venture capital
- Q120 Importance for the development of organic sector\_vertical cooperation
- Q122 Importance for the development of organic sector\_definition of strategy
- Q126 The marketing for organic products (in the sense of strategic, operational.

## REZULTATI 2. RUNDE DELPHY METODE U WBC - 4. DIO

Table 16 Trends WBC Future (5years) Prediction

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Valid						
Q91 Organic farming will spread in all WBC countries	42	3,8571	4,0000	4,00	,56618	3,00	5,00
Q93 Eco tourism is important for the development of this form of agriculture	42	4,5000	4,5000	4,00	,50606	4,00	5,00
Q95 Agro tourism is important for the development of this form of agriculture	42	4,2857	4,0000	4,00	,59615	2,00	5,00
Q97 Mountain tourism is important for the development of this form of agriculture	43	4,3023	4,0000	4,00	,55784	3,00	5,00
Q99 Health tourism is important for the development of this form of agriculture	42	4,3571	4,0000	4,00	,57685	3,00	5,00
Q103 Media (including internet) is important for development of organic market in my country	43	4,3256	4,0000	4,00	,56572	3,00	5,00
Q105 Activities of non-governmental organizations (national and international) are important for the development of the organic sector	42	4,2619	4,0000	4,00	,82815	1,00	5,00
Q107 The organic market development depends on the general level of wealth	43	4,2093	4,0000	4,00	,59993	3,00	5,00
Q109 Organic farming is a success factor for agricultural sector in all the WBC countries	43	3,6279	4,0000	4,00	,92642	2,00	5,00
Q111 Initiatives in organic production play a key role in preserving jobs in rural areas	42	4,0476	4,0000	5,00	,98655	2,00	5,00
Q113 The organic sector brings about new possibilities for income and labor	43	4,4186	4,0000	4,00	,54478	3,00	5,00
Q115 The organic sector supports the economy in rural areas	43	4,0465	4,0000	4,00	,72222	2,00	5,00
Q117 Importance for the development of organic sector_new technology	43	4,2093	4,0000	4,00	,70906	3,00	5,00
Q119 Importance for the development of organic sector_risk venture capital	43	3,9070	4,0000	4,00	,75005	2,00	5,00
Q121 Importance for the development of organic sector_vertical cooperation	43	4,3721	4,0000	4,00	,53556	3,00	5,00
Q123 Importance for the development of organic sector_definition of strategy	43	4,4651	5,0000	5,00	,63053	3,00	5,00
Q127 The marketing for organic products (in the sense of strategic, operational, 4 P - marketing) has to be improved	43	4,3953	4,0000	5,00	,69486	2,00	5,00



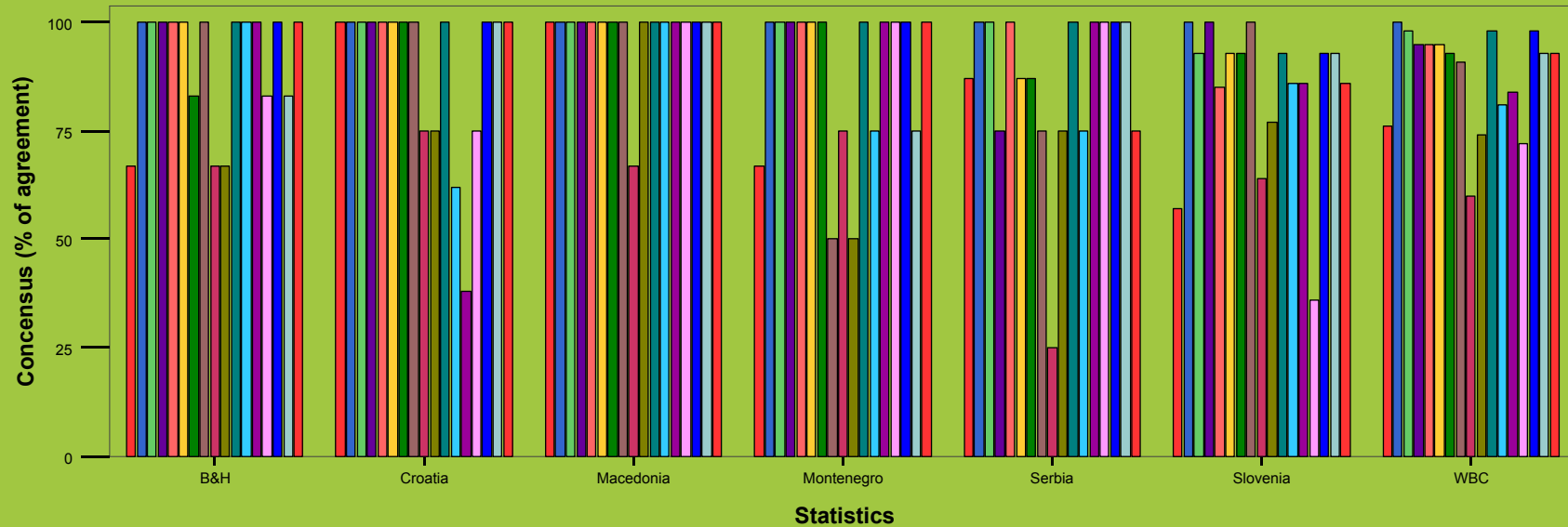
## REZULTATI 2. RUNDE DELPHY METODE U WBC - 4. DIO

Table 17 Trends WBC Future (5years) Prediction

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q91 Organic farming will spread in all WBC countries	67	100	100	67	87	57	76
Q93 Eco tourism is important for the development of this form of agriculture	100	100	100	100	100	100	100
Q95 Agro tourism is important for the development of this form of agriculture	100	100	100	100	100	93	98
Q97 Mountain tourism is important for the development of this form of agriculture	100	100	100	100	75	100	95
Q99 Health tourism is important for the development of this form of agriculture	100	100	100	100	100	85	95
Q103 Media (including internet) is important for development of organic market in my country	100	100	100	100	87	93	95
Q105 Activities of non-governmental organizations (national and international) are important for the development of the organic sector	83	100	100	100	87	93	93
Q107 The organic market development depends on the general level of wealth	100	100	100	50	75	100	91
Q109 Organic farming is a success factor for agricultural sector in all the WBC countries	67	75	67	75	25	64	60
Q111 Initiatives in organic production play a key role in preserving jobs in rural areas	67	75	100	50	75	77	74
Q113 The organic sector brings about new possibilities for income and labor	100	100	100	100	100	93	98
Q115 The organic sector supports the economy in rural areas	100	62	100	75	75	86	81
Q117 Importance for the development of organic sector_new technology	100	38	100	100	100	86	84
Q119 Importance for the development of organic sector_risk venture capital	83	75	100	100	100	36	72
Q121 Importance for the development of organic sector_vertical cooperation	100	100	100	100	100	93	98
Q123 Importance for the development of organic sector_definition of strategy	83	100	100	75	100	93	93
Q127 The marketing for organic products (in the sense of strategic, operational, 4 P - marketing) has to be improved	100	100	100	100	75	86	93

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 4. DIO

Fig 8 Trends WBC Future (5years) Prediction



### Variables

- Q91 Organic farming will spread in all WBC countries
- Q93 Eco tourism is important for the development of this form of agriculture
- Q95 Agro tourism is important for the development of this form of agriculture
- Q97 Mountain tourism is important for the development of this form of agriculture
- Q99 Health tourism is important for the development of this form of agriculture
- Q103 Media (including internet) is important for development of organic market in my country
- Q105 Activities of non-governmental organizations (national and international) are important
- Q107 The organic market development depends on the general level of wealth
- Q109 Organic farming is a success factor for agricultural sector in all the WBC countries
- Q111 Initiatives in organic production play a key role in preserving jobs in rural areas
- Q113 The organic sector brings about new possibilities for income and labor
- Q115 The organic sector supports the economy in rural areas
- Q117 Importance for the development of organic sector\_new technology
- Q119 Importance for the development of organic sector\_risk venture capital
- Q121 Importance for the development of organic sector\_vertical cooperation
- Q123 Importance for the development of organic sector\_definition of strategy
- Q127 The marketing for organic products (in the sense of strategic, operational)

## REZULTATI 2. RUNDE DELPHY METODE U WBC - 5. DIO

**Table 18 Supply Chain - WBC Present Situation**

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Valid						
Q128 Distribution channels for organic products are numerous and devirsified	33	2,2121	2,0000	2,00	,92728	1,00	5,00
Q130 Rank particular types of distribution channels by their importance for market development_green market	33	3,6061	4,0000	4,00	1,17099	1,00	5,00
Q132 Rank particular types of distribution channels by their importance for market development_ farm gate	33	3,4848	4,0000	4,00	1,00378	1,00	5,00
Q134 Rank particular types of distribution channels by their importance for market development_ organic food store	33	3,8182	4,0000	4,00	1,10268	1,00	5,00
Q136 Rank particular types of distribution channels by their importance for market development_ Box schemes	33	3,1212	3,0000	3,00	,96039	2,00	5,00
Q138 Rank particular types of distribution channels by their importance for market development_ Supermarkets	32	3,7813	4,0000	4,00	,90641	2,00	5,00
Q140 Rank particular types of distribution channels by their importance for market development_ Discounters	33	2,7576	2,0000	2,00	1,17341	1,00	5,00
Q142 Rank particular types of distribution channels by their importance for market development_ HoReCa	33	3,1212	3,0000	4,00	1,13901	1,00	5,00
Q144 Rank particular types of distribution channels by their importance for market development_ Internet	33	3,1212	3,0000	4,00	1,13901	1,00	5,00
Q148 A better organization of the supply chain is necessary. Evaluate importance of each measure_Vertical cooperation	33	3,6667	4,0000	4,00	,98953	2,00	5,00
Q150 A better organization of the supply chain is necessary. Evaluate importance of each measure_Transparency	33	3,7576	4,0000	4,00	1,00095	1,00	5,00
Q152 A better organization of the supply chain is necessary. Evaluate importance of each measure_Traceability	33	3,8485	4,0000	4,00	1,06423	2,00	5,00
Q154 A better organization of the supply chain is necessary. Evaluate importance of each measure_Quality management	33	4,0303	4,0000	4,00	1,04537	2,00	5,00

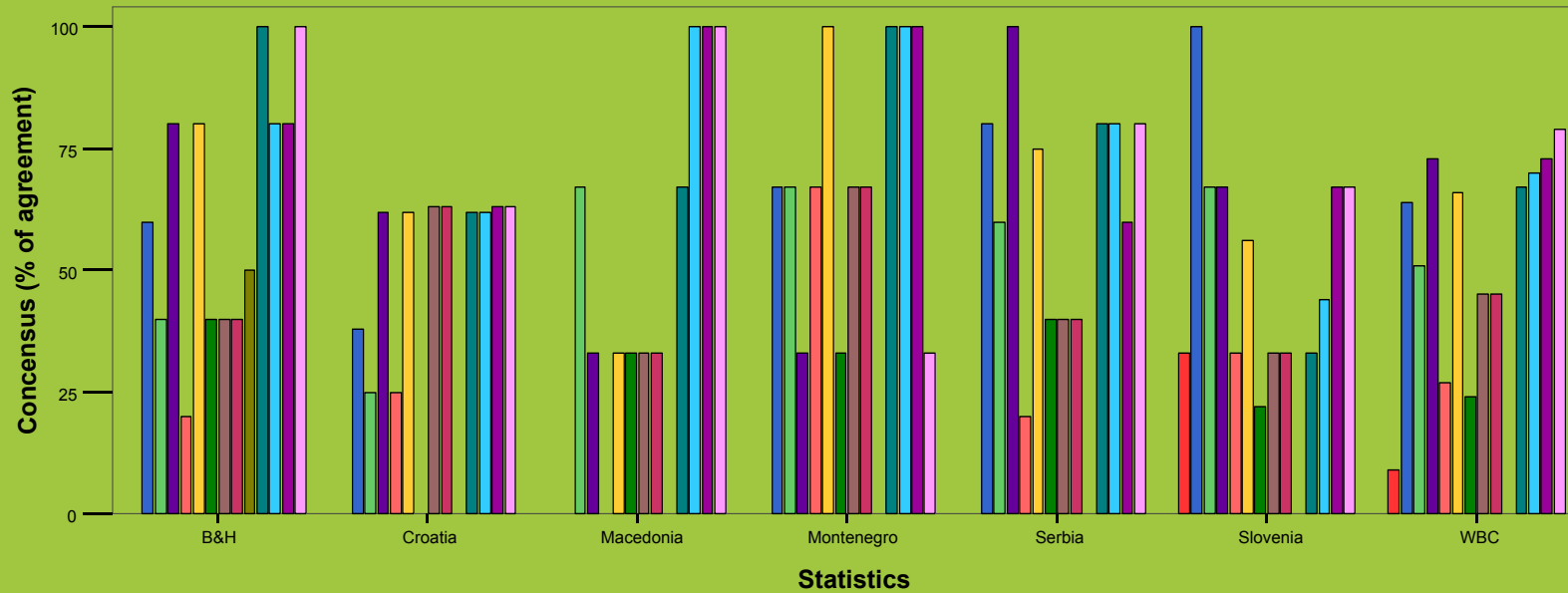
## REZULTATI 2. RUNDE DELPHY METODE U WBC - 5. DIO

Table 19 Supply Chain - WBC Present Situation

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q128 Distribution channels for organic products are numerous and devirsified	0	0	0	0	0	33	9
Q130 Rank particular types of distribution channels by their importance for market development_ green market	60	38	0	67	80	100	64
Q132 Rank particular types of distribution channels by their importance for market development_ farm gate	40	25	67	67	60	67	51
Q134 Rank particular types of distribution channels by their importance for market development_ organic food store	80	62	33	33	100	67	73
Q136 Rank particular types of distribution channels by their importance for market development_ Box schemes	20	25	0	67	20	33	27
Q138 Rank particular types of distribution channels by their importance for market development_ Supermarkets	80	62	33	100	75	56	66
Q140 Rank particular types of distribution channels by their importance for market development_ Discounters	40	0	33	33	40	22	24
Q142 Rank particular types of distribution channels by their importance for market development_ HoReCa	40	63	33	67	40	33	45
Q144 Rank particular types of distribution channels by their importance for market development_ Internet	40	63	33	67	40	33	45
Q148 A better organization of the supply chain is necessary. Evaluate importance of each measure_Vertical cooperation	100	62	67	100	80	33	67
Q150 A better organization of the supply chain is necessary. Evaluate importance of each measure_Transparency	80	62	100	100	80	44	70
Q152 A better organization of the supply chain is necessary. Evaluate importance of each measure_Traceability	80	63	100	100	60	67	73
Q154 A better organization of the supply chain is necessary. Evaluate importance of each measure_Quality management	100	63	100	33	80	67	79

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 5. DIO

Fig 9 Consumer Behaviour - WBC Present Situation



### Variables

- Q128 Distribution channels for organic products are numerous and devirsified
- Q130 Rank particular types of distribution channels by their importance for market development\_ green
- Q132 Rank particular types of distribution channels by their importance for market development\_ farm
- Q134 Rank particular types of distribution channels by their importance for market development\_ orga
- Q136 Rank particular types of distribution channels by their importance for market development\_ Box
- Q138 Rank particular types of distribution channels by their importance for market development\_ Sup
- Q140 Rank particular types of distribution channels by their importance for market development\_ Disc
- Q142 Rank particular types of distribution channels by their importance for market development\_ HoReCa
- Q144 Rank particular types of distribution channels by their importance for market development\_ Internet
- Q146 Rank particular types of distribution channels by their importance for market development\_ Other (Present situati
- Q148 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Vertical cooperatic
- Q150 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Transparency
- Q152 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Traceability
- Q154 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Quality managemen

## REZULTATI 2. RUNDE DELPHY METODE U WBC - 5. DIO

Table 20 Supply Chain WBC Future (5 year) Prediction

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Valid						
Q129 Distribution channels for organic products are numerous and devirsified	33	3,515	4,0000	4,00	,93946	2,00	5,00
Q131 Rank particular types of distribution channels by their importance for market development_green market	33	3,848	4,0000	4,00	1,06423	2,00	5,00
Q133 Rank particular types of distribution channels by their importance for market development_ farm gate	33	4,061	4,0000	4,00	,78817	3,00	5,00
Q135 Rank particular types of distribution channels by their importance for market development_ organic food store	33	4,667	5,0000	5,00	,47871	4,00	5,00
Q137 Rank particular types of distribution channels by their importance for market development_ Box schemes	33	3,970	4,0000	4,00	,95147	2,00	5,00
Q139 Rank particular types of distribution channels by their importance for market development_ Supermarkets	33	4,364	5,0000	5,00	,82228	2,00	5,00
Q141 Rank particular types of distribution channels by their importance for market development_ Discounters	33	3,091	3,0000	2,00	1,12815	1,00	5,00
Q143 Rank particular types of distribution channels by their importance for market development_ HoReCa	33	4,364	4,0000	4,00	,54876	3,00	5,00
Q145 Rank particular types of distribution channels by their importance for market development_ Internet	32	4,188	4,5000	5,00	1,09065	1,00	5,00
Q149 A better organization of the supply chain is necessary. Evaluate importance of each measure_Vertical cooperation	33	4,515	5,0000	5,00	,71244	2,00	5,00
Q151 A better organization of the supply chain is necessary. Evaluate importance of each measure_Transparency	33	4,545	5,0000	5,00	,61699	3,00	5,00
Q153 A better organization of the supply chain is necessary. Evaluate importance of each measure_Traceability	33	4,576	5,0000	5,00	,66287	2,00	5,00
Q155 A better organization of the supply chain is necessary. Evaluate importance of each measure_Quality management	33	4,636	5,0000	5,00	,54876	3,00	5,00

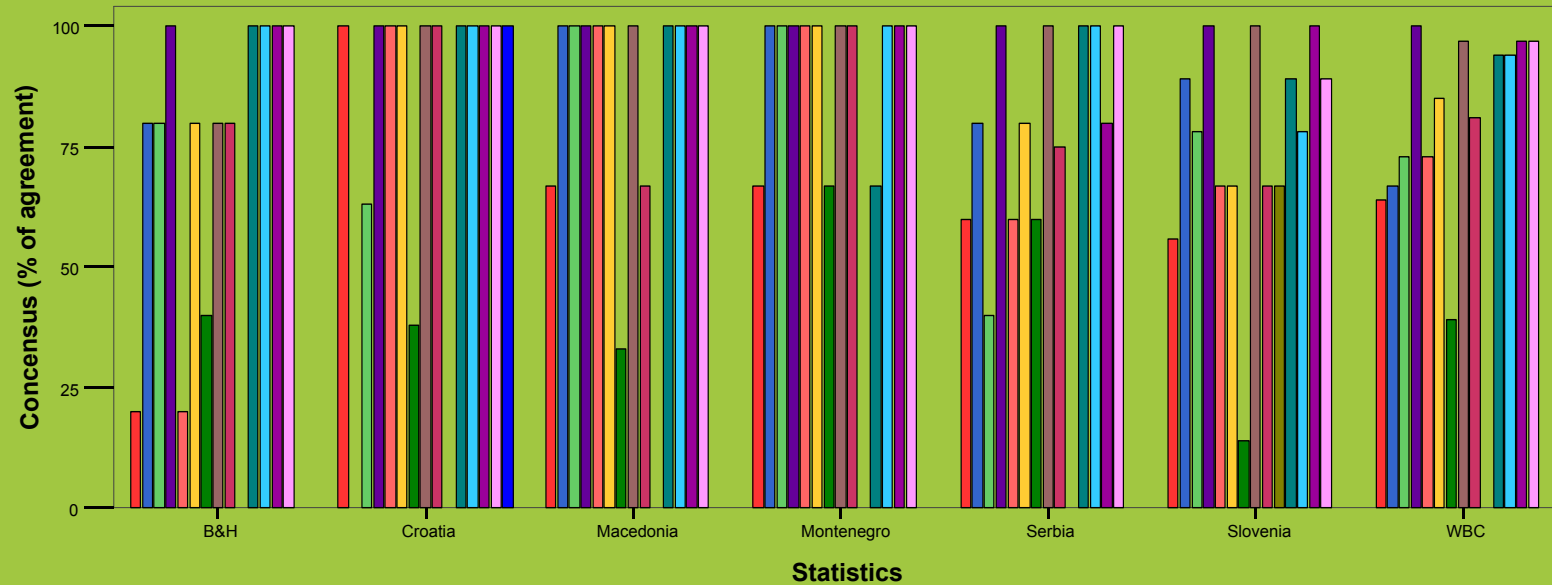
## REZULTATI 2. RUNDE DELPHY METODE U WBC - 5. DIO

Table 21 Supply Chain WBC Future (5 year) Prediction

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q129 Distribution channels for organic products are numerous and devirsified	20	100	67	67	60	56	64
Q131 Rank particular types of distribution channels by their importance for market development_ green market	80	0	100	100	80	89	67
Q133 Rank particular types of distribution channels by their importance for market development_ farm gate	80	63	100	100	40	78	73
Q135 Rank particular types of distribution channels by their importance for market development_ organic food store	100	100	100	100	100	100	100
Q137 Rank particular types of distribution channels by their importance for market development_ Box schemes	20	100	100	100	60	67	73
Q139 Rank particular types of distribution channels by their importance for market development_ Supermarkets	80	100	100	100	80	67	85
Q141 Rank particular types of distribution channels by their importance for market development_ Discounters	40	38	33	67	60	14	39
Q143 Rank particular types of distribution channels by their importance for market development_ HoReCa	80	100	100	100	100	100	97
Q145 Rank particular types of distribution channels by their importance for market development_ Internet	80	100	67	100	75	67	81
Q149 A better organization of the supply chain is necessary. Evaluate importance of each measure_ Vertical cooperation	100	100	100	67	100	89	94
Q151 A better organization of the supply chain is necessary. Evaluate importance of each measure_ Transparency	100	100	100	100	100	78	94
Q153 A better organization of the supply chain is necessary. Evaluate importance of each measure_ Traceability	100	100	100	100	80	100	97
Q155 A better organization of the supply chain is necessary. Evaluate importance of each measure_ Quality management	100	100	100	100	100	89	97

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 5. DIO

Fig 10 Supply Chain WBC Future (5 year) Prediction



- Variables**
- Q129 Distribution channels for organic products are numerous and devirsified
  - Q131 Rank particular types of distribution channels by their importance for market development\_ green market
  - Q133 Rank particular types of distribution channels by their importance for market development\_ farm-to-table
  - Q135 Rank particular types of distribution channels by their importance for market development\_ organic
  - Q137 Rank particular types of distribution channels by their importance for market development\_ Box
  - Q139 Rank particular types of distribution channels by their importance for market development\_ Supermarket
  - Q141 Rank particular types of distribution channels by their importance for market development\_ Dis
  - Q143 Rank particular types of distribution channels by their importance for market development\_ HoReCa
  - Q145 Rank particular types of distribution channels by their importance for market development\_ Internet
  - Q147 Rank particular types of distribution channels by their importance for market development\_ Other (Future 5 years prediction)
  - Q149 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Vertical cooperation
  - Q151 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Transparency
  - Q153 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Traceability
  - Q155 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Quality management
  - Q157 A better organization of the supply chain is necessary. Evaluate importance of each measure\_Other\_ (Future 5 years prediction)



# REZULTATI 2. RUNDE DELPHY METODE U WBC - 6. DIO

Table 22 Consumer Behaviour WBC Present Situation

	N		Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Valid							
Q158 Prices of organic products are, from the perspective of consumers, too high	33		3,836	4,000	4,00	,85944	1,00	5,00
Q160 Organic consumers worry less about high prices than others consumers.	33		3,424	4,000	4,00	,75126	2,00	5,00
Q162 Rank the motivations of consumers for buying organic food_Environment	33		3,061	3,000	4,00	1,05887	1,00	5,00
Q164 Rank the motivations of consumers for buying organic food_Local agriculture	33		3,061	3,000	4,00	,96629	1,00	5,00
Q166 Rank the motivations of consumers for buying organic food_Traditional agriculture	33		3,091	3,000	4,00	1,07132	1,00	5,00
Q168 Rank the motivations of consumers for buying organic food_Small-scale agriculture	33		3,121	3,000	4,00	,96039	1,00	5,00
Q170 Rank the motivations of consumers for buying organic food_Traditional processing	32		3,250	3,000	4,00	,95038	1,00	5,00
Q172 Rank the motivations of consumers for buying organic food_Health concerns	33		4,606	5,000	5,00	,49620	4,00	5,00
Q174 Rank the motivations of consumers for buying organic food_Animal welfare	33		3,121	3,000	3,00	,96039	1,00	5,00
Q176 Rank the motivations of consumers for buying organic food_Rural development	33		2,970	3,000	2,00	1,15879	1,00	5,00
Q180 Consumers are confused by different indications for food (organic, untreated, traditional ...)	33		4,061	4,000	5,00	,93339	2,00	5,00
Q182 Following attributes make confusion with organic with regard to consumer perception_Untreated	33		3,636	4,000	4,00	,85944	2,00	5,00
Q184 Following attributes make confusion with organic with regard to consumer perception_Traditional	33		3,182	4,000	4,00	1,33357	1,00	5,00
Q186 Following attributes make confusion with organic with regard to consumer perception_Local	32		3,250	3,500	4,00	1,04727	1,00	5,00
Q188 Following attributes make confusion with organic with regard to consumer perception_Regional	31		3,419	4,000	4,00	1,17684	1,00	5,00
Q192 Organic labeling is not well understood by consumers	33		3,182	3,000	2,00	1,18466	2,00	5,00
Q194 Consumers' awareness of organic food is increasing	33		3,667	4,000	4,00	,54006	3,00	5,00
Q196 Consumer trust towards organic depends on_Labels/ certificates	32		3,875	4,000	4,00	,75134	1,00	5,00
Q198 Consumer trust towards organic depends on_Place of purchase	32		3,719	4,000	4,00	,81258	2,00	5,00
Q200 Consumer trust towards organic depends on_Brand	33		3,818	4,000	4,00	,72692	2,00	5,00
Q202 Consumer trust towards organic depends on_Sales personnel	33		3,121	3,000	3,00 <sup>a</sup>	1,24392	1,00	5,00
Q204 Consumer trust towards organic depends on_Country of origin	25		3,400	4,000	4,00	1,08012	1,00	5,00
Q208 The main characteristics of organic consumers are_Urban	33		3,909	4,000	3,00 <sup>a</sup>	,80482	3,00	5,00
Q210 The main characteristics of organic consumers are_High level of formal education	33		4,212	4,000	4,00	,59987	3,00	5,00
Q212 The main characteristics of organic consumers are_Female	33		3,848	4,000	4,00	,93946	2,00	5,00
Q214 The main characteristics of organic consumers are_Elderly people	33		2,818	3,000	3,00	,95048	1,00	5,00
Q216 The main characteristics of organic consumers are_Well off	33		3,939	4,000	4,00	,65857	2,00	5,00
Q220 Tourists are pioneer consumers of organic	33		2,788	3,000	3,00	,89294	1,00	5,00
Q222 Consumers are more and more aware of health	33		3,788	4,000	4,00	,64988	2,00	5,00
Q224 Organic consumption is becoming a part of today's	33		3,061	3,000	2,00	1,05887	1,00	5,00
Q226 State certification of organic products is, from consumers' perspective, more credible than private	33		3,545	4,000	4,00	1,06334	1,00	5,00
Q228 Key promotional activities are education and information to consumers (introducing the concept of organic food, its benefits to individuals, society and the environment ...)	33		4,303	4,000	4,00	,52944	3,00	5,00

a. Multiple modes exist. The smallest value is shown

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 6. DIO

Table 23 Consumer Behaviour WBC Present Situation

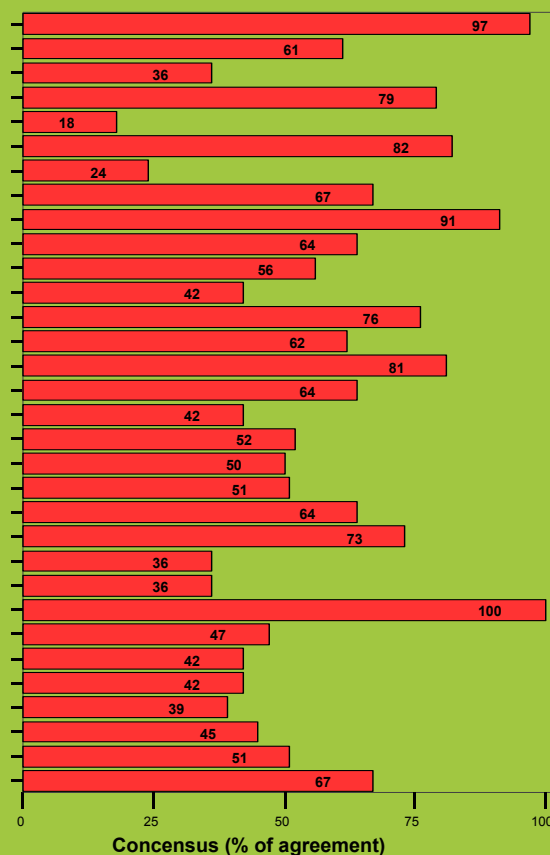
	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q158 Prices of organic products are, from the perspective of consumers, too high	20	100	33	33	60	56	67
Q160 Organic consumers worry less about high prices than others consumers.	40	63	33	33	40	67	51
Q162 Rank the motivations of consumers for buying organic food_ Environment	100	0	33	33	20	78	45
Q164 Rank the motivations of consumers for buying organic food_ Local agriculture	100	0	0	33	20	67	39
Q166 Rank the motivations of consumers for buying organic food_ Traditional agriculture	100	0	0	67	40	56	42
Q168 Rank the motivations of consumers for buying organic food_ Small-scale agriculture	100	0	0	33	20	78	42
Q170 Rank the motivations of consumers for buying organic food_ Traditional processing	100	0	0	50	20	67	47
Q172 Rank the motivations of consumers for buying organic food_ Health concerns	100	100	100	100	100	100	100
Q174 Rank the motivations of consumers for buying organic food_ Animal welfare	60	25	0	33	20	56	36
Q176 Rank the motivations of consumers for buying organic food_ Rural development	60	25	0	33	20	56	36
Q180 Consumers are confused by different indications for food (organic, untreated, traditional ...)	80	63	67	100	60	78	73
Q182 Following attributes make confusion with organic with regard to consumer perception_Untreated	60	100	67	33	60	44	64
Q184 Following attributes make confusion with organic with regard to consumer perception_Traditional	100	63	33	0	20	33	51
Q186 Following attributes make confusion with organic with regard to consumer perception_Local	40	100	0	33	40	13	50
Q188 Following attributes make confusion with organic with regard to consumer perception_Regional	80	75	0	100	40	56	52
Q192 Organic labeling is not well understood by consumers	80	0	33	33	60	78	42
Q194 Consumers' awareness of organic food is increasing	60	38	100	33	80	87	64
Q196 Consumer trust towards organic depends on_Labels/certificates	80	100	33	100	60	56	81
Q198 Consumer trust towards organic depends on_Place of purchase	80	38	100	100	50	67	62
Q200 Consumer trust towards organic depends on_Brand	80	100	33	100	60	44	76
Q202 Consumer trust towards organic depends on_Sales personnel	0	62	0	67	60	44	42
Q204 Consumer trust towards organic depends on_Country of origin	80		33	67	40	56	56
Q208 The main characteristics of organic consumers are_Urban	60	75	100	0	80	64	64
Q210 The main characteristics of organic consumers are_High level of formal education	80	100	100	67	100	89	91
Q212 The main characteristics of organic consumers are_Female	40	100	100	100	40	44	67
Q214 The main characteristics of organic consumers are_Elderly people	20	38	33	33	0	22	24
Q216 The main characteristics of organic consumers are_Well off	100	15	100	100	80	67	82
Q220 Tourists are pioneer consumers of organic	40	0	0	67	20	11	18
Q222 Consumers are more and more aware of health	40	100	100	100	60	78	79
Q224 Organic consumption is becoming a part of today's	40	38	33	33	40	33	36
Q226 State certification of organic products is, from consumers' perspective, more credible than private	40	62	67	33	60	78	61
Q228 Key promotional activities are education and information to consumers (introducing the concept of organic food, its benefits to individuals, society and the environment ...)	100	100	100	100	100	89	97

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 6. DIO

Fig 11 Consumer Behaviour WBC Present Situation

Statistics : WBC Countries

- Variables**
- Q228 Key promotional activities are education and information to consumers (introducing the co
  - Q226 State certification of organic products is, from consumers' perspective, more credible than private
    - Q224 Organic consumption is becoming a part of today's
    - Q222 Consumers are more and more aware of health
    - Q220 Tourists are pioneer consumers of organic
  - Q216 The main characteristics of organic consumers are\_Well off
  - Q214 The main characteristics of organic consumers are\_Elderly people
  - Q212 The main characteristics of organic consumers are\_Female
  - Q210 The main characteristics of organic consumers are\_High level of formal education
    - Q208 The main characteristics of organic consumers are\_Urban
  - Q204 Consumer trust towards organic depends on\_Country of origin
  - Q202 Consumer trust towards organic depends on\_Sales personnel
  - Q200 Consumer trust towards organic depends on\_Brand
  - Q198 Consumer trust towards organic depends on\_Place of purchase
  - Q196 Consumer trust towards organic depends on\_Labels/ certificates
    - Q194 Consumers' awareness of organic food is increasing
    - Q192 Organic labeling is not well understood by consumers
  - Q188 Following attributes make confusion with organic with regard to consumer perception\_Regional
  - Q186 Following attributes make confusion with organic with regard to consumer perception\_Local
  - Q184 Following attributes make confusion with organic with regard to consumer perception\_Traditional
  - Q182 Following attributes make confusion with organic with regard to consumer perception\_Untreated
  - Q180 Consumers are confused by different indications for food (organic, untreated, traditional ...)
    - Q176 Rank the motivations of consumers for buying organic food\_Rural development
    - Q174 Rank the motivations of consumers for buying organic food\_Animal welfare
    - Q172 Rank the motivations of consumers for buying organic food\_Health concerns
    - Q170 Rank the motivations of consumers for buying organic food\_Traditional processing
    - Q168 Rank the motivations of consumers for buying organic food\_Small-scale agriculture
    - Q166 Rank the motivations of consumers for buying organic food\_Traditional agriculture
    - Q164 Rank the motivations of consumers for buying organic food\_Local agriculture
    - Q162 Rank the motivations of consumers for buying organic food\_Environment
    - Q160 Organic consumers worry less about high prices than others consumers.
    - Q158 Prices of organic products are, from the perspective of consumers, too high



# REZULTATI 2. RUNDE DELPHY METODE U WBC - 6. DIO

Table 24 Consumer Behaviour - WBC Future (5 year) Prediction

	N	Mean	Median	Mode	Std. Deviation	Minimum	Maximum
	Valid						
Q159 Prices of organic products are, from the perspective of consumers, too high	33	3,3030	3,0000	3,00	,88335	1,00	5,00
Q161 Organic consumers worry less about high prices than others consumers.	33	3,6364	4,0000	4,00	,74239	2,00	5,00
Q163 Rank the motivations of consumers for buying organic food_Environment	33	3,5758	4,0000	4,00	1,03169	1,00	5,00
Q165 Rank the motivations of consumers for buying organic food_Local agriculture	33	3,8182	4,0000	4,00	,72692	2,00	5,00
Q167 Rank the motivations of consumers for buying organic food_Traditional agriculture	33	3,7273	4,0000	4,00	,87581	1,00	5,00
Q169 Rank the motivations of consumers for buying organic food_Small-scale agriculture	33	3,6364	4,0000	4,00	,74239	1,00	5,00
Q171 Rank the motivations of consumers for buying organic food_Traditional processing	33	4,0606	4,0000	4,00	,65857	3,00	5,00
Q173 Rank the motivations of consumers for buying organic food_Health concerns	33	4,7576	5,0000	5,00	,43519	4,00	5,00
Q175 Rank the motivations of consumers for buying organic food_Animal welfare	33	4,0000	4,0000	4,00	,75000	2,00	5,00
Q177 Rank the motivations of consumers for buying organic food_Rural development	33	3,5758	4,0000	4,00	1,03169	1,00	5,00
Q181 Consumers are confused by different indications for food (organic, untreated, traditional ...)	33	3,5152	4,0000	4,00	1,09320	2,00	5,00
Q183 Following attributes make confusion with organic with regard to consumer perception_Untreated	32	3,1875	3,0000	2,00	1,17604	1,00	5,00
Q185 Following attributes make confusion with organic with regard to consumer perception_Traditional	33	3,2727	3,0000	2,00	1,12563	2,00	5,00
Q187 Following attributes make confusion with organic with regard to consumer perception_Local	32	3,4375	4,0000	2,00 <sup>a</sup>	1,24272	1,00	5,00
Q189 Following attributes make confusion with organic with regard to consumer perception_Regional	31	3,4516	3,0000	3,00	1,02758	2,00	5,00
Q193 Organic labeling is not well understood by consumers	32	2,6563	2,0000	2,00	1,23417	1,00	5,00
Q195 Consumers' awareness of organic food is increasing.	33	4,1818	4,0000	4,00	,68258	3,00	5,00
Q197 Consumer trust towards organic depends on_Labels/certificates	33	4,2424	4,0000	4,00	,79177	1,00	5,00
Q199 Consumer trust towards organic depends on_Place of purchase	33	3,9394	4,0000	4,00	,78817	2,00	5,00
Q201 Consumer trust towards organic depends on_Brand	33	4,0909	4,0000	4,00	,76500	2,00	5,00
Q203 Consumer trust towards organic depends on_Sales personnel	33	3,2424	3,0000	4,00	1,27550	1,00	5,00
Q205 Consumer trust towards organic depends on_Country of origin	33	3,5152	4,0000	4,00	,93946	1,00	5,00
Q209 The main characteristics of organic consumers are_Urban	33	4,0000	4,0000	4,00	,86603	2,00	5,00
Q211 The main characteristics of organic consumers are_High level of formal education	33	4,0909	4,0000	5,00	,87905	2,00	5,00
Q213 The main characteristics of organic consumers are_Female	33	3,8485	4,0000	4,00	,93946	2,00	5,00
Q215 The main characteristics of organic consumers are_Elderly people	33	3,0909	3,0000	3,00	1,04174	1,00	5,00
Q217 The main characteristics of organic consumers are_Well off	32	3,8125	4,0000	4,00	,85901	2,00	5,00
Q221 Tourists are pioneer consumers of organic	33	3,0303	3,0000	3,00	,91804	1,00	5,00
Q223 Consumers are more and more aware of health	33	4,1212	4,0000	4,00	,69631	2,00	5,00
Q225 Organic consumption is becoming a part of today's lifestyle	33	3,5455	4,0000	4,00	1,00284	2,00	5,00
Q227 State certification of organic products is, from consumers' perspective, more credible than private	33	3,5455	4,0000	4,00	1,00284	1,00	5,00
Q229 Key promotional activities are education and information to consumers (introducing the concept of organic food, its benefits to individuals, society and the environment ..)	32	4,4375	4,0000	4,00	,50402	4,00	5,00

a. Multiple modes exist. The smallest value is shown

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 6. DIO

Table 25 Consumer Behaviour - WBC Future (5 year) Prediction

	B&H	Croatia	Macedonia	Montenegro	Serbia	Slovenia	WBC
Q159 Prices of organic products are, from the perspective of consumers, too high	80	25	33	33	0	44	36
Q161 Organic consumers worry less about high prices than others consumers.	40	100	33	67	40	78	67
Q163 Rank the motivations of consumers for buying organic food_Environment	100	38	67	100	40	78	67
Q165 Rank the motivations of consumers for buying organic food_Local agriculture	100	38	33	100	60	89	70
Q167 Rank the motivations of consumers for buying organic food_Traditional agriculture	100	38	67	67	80	67	67
Q169 Rank the motivations of consumers for buying organic food_Small-scale agriculture	100	38	67	67	60	67	64
Q171 Rank the motivations of consumers for buying organic food_Traditional processing	100	100	33	100	80	67	82
Q173 Rank the motivations of consumers for buying organic food_Health concerns	100	100	100	100	100	100	100
Q175 Rank the motivations of consumers for buying organic food_Animal welfare	80	100	33	67	60	89	79
Q177 Rank the motivations of consumers for buying organic food_Rural development	100	25	67	67	40	67	58
Q181 Consumers are confused by different indications for food (organic, untreated, traditional ...)	80	25	33	33	60	67	61
Q183 Following attributes make confusion with organic with regard to consumer perception_Untreated	0	75	33	33	60	33	34
Q185 Following attributes make confusion with organic with regard to consumer perception_Traditional	60	38	0	67	40	44	33
Q187 Following attributes make confusion with organic with regard to consumer perception_Local	20	100	0	67	60	33	53
Q189 Following attributes make confusion with organic with regard to consumer perception_Regional	80	75	0	67	25	11	45
Q193 Organic labeling is not well understood by consumers	60	0	33	0	40	56	34
Q195 Consumers' awareness of organic food is increasing.	60	100	100	100	80	78	85
Q197 Consumer trust towards organic depends on_Labels/certificates	80	100	100	100	80	100	94
Q199 Consumer trust towards organic depends on_Place of purchase	80	75	100	100	80	67	79
Q201 Consumer trust towards organic depends on_Brand	80	100	100	100	80	56	82
Q203 Consumer trust towards organic depends on_Sales personnel	20	63	33	33	60	56	48
Q205 Consumer trust towards organic depends on_Country of origin	100	100	0	33	40	67	67
Q209 The main characteristics of organic consumers are_Urban	80	75	100	33	60	67	70
Q211 The main characteristics of organic consumers are_High level of formal education	80	63	67	33	80	89	73
Q213 The main characteristics of organic consumers are_Female	40	100	67	100	40	56	67
Q215 The main characteristics of organic consumers are_Elderly people	20	38	33	33	20	33	30
Q217 The main characteristics of organic consumers are_Well off	100	38	50	100	20	67	72
Q221 Tourists are pioneer consumers of organic	40	0	33	0	80	44	23
Q223 Consumers are more and more aware of health	60	100	100	100	100	78	88
Q225 Organic consumption is becoming a part of today's lifestyle	40	38	67	67	80	66	54
Q227 State certification of organic products is, from consumers' perspective, more credible than private	40	63	67	33	60	67	58
Q229 Key promotional activities are education and information to consumers (introducing the concept of organic food, its benefits to individuals, society and the environment ...)	100	100	100	100	100	100	100

# REZULTATI 2. RUNDE DELPHY METODE U WBC - 6. DIO

Fig 12 Consumer Behaviour - WBC Future (5 year) Prediction

Statistics : WBC Countries

Variables

- Q229 Key promotional activities are education and information to consumers (introducing the concept)
- Q227 State certification of organic products is, from consumers' perspective, more credible than private
  - Q225 Organic consumption is becoming a part of today's lifestyle
    - Q223 Consumers are more and more aware of health
      - Q221 Tourists are pioneer consumers of organic
        - Q217 The main characteristics of organic consumers are\_Well off
        - Q215 The main characteristics of organic consumers are\_Elderly people
        - Q213 The main characteristics of organic consumers are\_Female
        - Q211 The main characteristics of organic consumers are\_High level of formal education
          - Q209 The main characteristics of organic consumers are\_Urban
          - Q205 Consumer trust towards organic depends on\_Country of origin
          - Q203 Consumer trust towards organic depends on\_Sales personnel
            - Q201 Consumer trust towards organic depends on\_Brand
            - Q199 Consumer trust towards organic depends on\_Place of purchase
            - Q197 Consumer trust towards organic depends on\_Labels/ certificates
              - Q195 Consumers' awareness of organic food is increasing.
              - Q193 Organic labeling is not well understood by consumers
            - Q189 Following attributes make confusion with organic with regard to consumer perception\_Regional
              - Q187 Following attributes make confusion with organic with regard to consumer perception\_Local
            - Q185 Following attributes make confusion with organic with regard to consumer perception\_Traditional
            - Q183 Following attributes make confusion with organic with regard to consumer perception\_Untreated
              - Q181 Consumers are confused by different indications for food (organic, untreated, traditional ...)
            - Q177 Rank the motivations of consumers for buying organic food\_Rural development
              - Q175 Rank the motivations of consumers for buying organic food\_Animal welfare
              - Q173 Rank the motivations of consumers for buying organic food\_Health concerns
              - Q171 Rank the motivations of consumers for buying organic food\_Traditional processing
              - Q169 Rank the motivations of consumers for buying organic food\_Small-scale agriculture
              - Q167 Rank the motivations of consumers for buying organic food\_Traditional agriculture
                - Q165 Rank the motivations of consumers for buying organic food\_Local agriculture
                  - Q163 Rank the motivations of consumers for buying organic food\_Environment
                  - Q161 Organic consumers worry less about high prices than others consumers.
                  - Q159 Prices of organic products are, from the perspective of consumers, too high



### 1.DIO – Utjecaj vlade i njezine politike

- 1. Nacionalna strategija razvoja ekološke proizvodnje je posebno važna. Tako će biti i u budućnosti.**
- 1. Regionalna i lokalna podrška su vrlo važne za razvoj ekološke poljoprivrede kako danas tako i u budućnosti.**
- 3. B&H i Hrvatska očekuju veliki nedostatak političke podrške i odgovarajuće poticaje za razvoj ekološkog sektora. Ne očekuju znatno bolju situaciju niti u budućnosti.**
- 4. Vladine institucije trebaju posebno naglasiti sustav kontrole kao i certifikaciju ekološke hrane, danas i u budućnosti.**

### 2.DIO – Proizvodnja

- 1. Motivacija proizvođača je važna u razvoju ekološkog sektora. Isto se očekuje i u budućnosti.**
- 2. Obrazovanje i trening proizvođača su također posebno potrebni kako danas tako i u budućnosti.**
- 3. Financijska konsolidacija ekoloških farmi je nužna.**
- 4. Horizontalnu integraciju među farmerima nije za očekivati osim u Makedoniji.**



### 3.DIO – Tržište

**1. Jasno označavanje ekoloških proizvoda potrebno je, kako bi se potaknuo razvoj ekološke hrane. U budućnosti, stručnjaci očekuju da će to biti i važnije.**

**2. Distributeri imaju veću snagu u pregovaranjima od proizvođača. Stručnjaci očekuju da će se to ipak nešto smanjiti u budućnosti.**

**3. Tržište ekološke hrane raste u svim WBC.**

**4. Eksperti smatraju da tržište ekološkog mesa nije značajno. Slična situacija je s mlijekom, voćem, povrćem i hranom za djecu (iako postoje značajne razlike između zemalja). U budućnosti stručnjaci očekuju snažne pozitivne promjene.**

**5. Ne postoji tržište ekološke hrane u urbanim i seoskim turističkim područjima, seoskim zabačenim područjima i seoskim područjima u blizini gradova. Stručnjaci smatraju da će se ta situacija u budućnosti znatno promijeniti.**

### 4.DIO – Trendovi

- 1. Marketing ekoloških proizvoda treba biti znatno poboljššan.**
- 2. Razvoj tržišta ekološke hrane ovisi o razini gospodarske razvijenosti i općoj razini bogatstva neke zemlje.**
- 3. Proizvodnja ekološke hrane daje nove mogućnosti za veći prihod i zapošljavanje. Očekivanja u budućnosti još su veća.**
- 4. Vertikalna integracija i definiranje strategije su važni za razvoj ekološke hrane. Još važniji će biti u budućnosti.**
- 5. Eko turizam je važan za razvoj ekološkog sektora, a u budućnosti se očekuje da će biti još važniji.**
- 6. Uzgoj ekološke hrane nije značajan faktor uspjeha u poljoprivrednom sektoru u svim zemljama Zapadnog Balkana. Stručnjaci očekuju da će u budućnosti imati nešto veću važnost.**

### 5.DIO – Lanac opskrbe

- 1. Upravljanje kvalitetom i bolja organizacija lanca opskrbe je izrazito važna za razvoj ekološke hrane. Eksperti očekuju da će to u budućnosti biti još važnije.**
- 2. Eksperti u različitim zemljama imaju isto negativno mišljenje o broju i različitosti kanala distribucije. Njihova predviđanja za budućnost idu u sasvim suprotnom pravcu odnosno očekuju snažan razvoj kanala distribucije.**

### 6.DIO – Ponašanje potrošača

- 1. Briga o zdravlju je vrlo snažan motiv u kupovini ekološke hrane. Isto se očekuje i u budućnosti.**
- 1. Ključne promocijske aktivnosti su obrazovanje i pružanje informacija potrošačima. Eksperti očekuju važnost toga još i više u budućnosti.**
- 1. Glavna karakteristika potrošača ekološke hrane, prema mišljenju eksperata, su visoka razina obrazovanja. Oni očekuju da će to biti manje važno u budućnosti.**