

WP7

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**DL7.2 Market data, market trend and consumer
behaviour report for organic products in the
WBC
-Delphi method-**

All WBC Partners and Nataša Renko, Ruzica Butigan,
Sanda Renko, Ante Vuletic (ZAG), Nina Berner, Burkhard
Schaer (ECOZEPT), Martine Zaouche- Laniau (GEM), France

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DELPHY 1st ROUND RESULTS IN WBC

DELPHY 2nd ROUND RESULTS IN WBC

CONCLUSIONS

Definition of Delphi

- ***“the objective of Delphi approach is the reliable and creative exploration of ideas or the production of suitable information for decision making”.***
- The method has been mainly used to generate forecast in different fields (the name is a reference to the town of Delphi, famous for its oracle). The Delphi method was introduced by Olaf Helmer and Norman Dalkey of the Rand Corporation in 1953 for the purpose of addressing a specific military problem.
- The purpose of the Delphi method is to obtain a reliable response to a problem from a group of experts. The process guides the group towards a consensus.

Main objectives

Delphi is very well adapted to the general objectives of the survey, oriented toward key stakeholders for this market. It will allow getting experts point of view related to **the two main objectives of the study:**

1. The current situation of the organic market in each country and
2. The forecasts of the experts related to organic market development.

Experts identification and recruitment

- The Delphi method uses a panel of experts.
- Members of the experts' panel in 6 WB countries were selected in an informal way.
- The assumption was that in WBC are not very many experts in organic food but the aim were to recruit a broader panel of experts from different range of occupational backgrounds.

Experts participating to the survey are split into three categories:

1. **Stakeholders** of the organic supply chain: producers (or representatives of producers), processors, wholesalers, retailers, importers (distributors of foreign organic products) and exporters
2. **Policy makers**/ regulators/ NGO's: Authorities, Certifying organisations, Public Health institutes, Consumers organisations
3. **Researchers** : academics, private agencies

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 st round | 2 nd 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 |
| Total TOTAL | 39 | 44 | 25 | 20 | | |

The procedure and application of Delphi method

1. Experts identification and recruitment
2. Definition of 1st round questionnaire
3. The issue of the questionnaire introduced to the panel of experts
4. Collection of individual opinions of the experts on this issue.
5. Preparation of the first round report from each country (partner in the project) after reception of all fulfilled questionnaires and sending the results of the first round together with the second round questionnaire to the experts.
6. Rounds continue until pre-determined consensus level, stability of opinion, until no further consensus can be reached.

7. Delphi technique used to have 3 to 4 rounds (in 1978). Later evidence appeared to show that 2 or 3 rounds are preferred (1994-1998). Latest experience (Proctor&Hunt; Beach; Green at al. in 2000) suggest that in majority of cases 2 rounds are sufficient. Numbers of rounds differ from case to case depending on number of experts, subject in question, complexity of issues involved etc.
8. Universally agreed proportion of the level of consensus does not exist for Delphi. The level used depends upon sample members. McKenna suggests that consensus should be over 50 % of agreement among respondents. Sumsion recommended 70 %, while Green at al. suggested 80 %. There are numerous other opinions and suggestions as well.
9. Expert panel sizes frequently 8 – 20 (for less developed market as WB markets it could be 4-12 because of the smaller number of experts).

Advantages

- Interaction in Delphi is anonymous; comments, forecasts, etc are presented to the group in such a way as to suppress any identification.
- Can produce agreements when other methods may not be possible.
- Enough time for reflection, improving the strength of opinion.
- Highly cost-effective.
- Gives access to groups of widely dispersed experts.

Disadvantages

- There is no evidence of reliability of Delphi method.
- There exist no consistent methods for reporting findings. (Schmidt, 1997).
- The sample of panel members is not representative.
- Can take long periods of time to complete.
- Panel size and consensus levels are of most importance.
- The choice of experts is absolutely critical.
- Consensus does not necessarily mean truth.

QUESTIONNAIRES

Round 1- Questionnaire

The objectives are:

- To complete the description of the current situation of the organic production, including history of the development, analysis of the current and future state of the organic market.
- To get a first analysis of the organic market development.
- To get an insight of the consumers motivations towards organic food.

The questionnaires were sent by email. The survey for the 1st round started at the end of April 2010 and was finished at the beginning of May of 2010.

EXPERT QUESTIONNAIRE: DELPHI METHOD - FIRST ROUND

1. What are the most important influences that have shaped the development of the organic market in your home country **in the past 10 years**? (Please describe key events if appropriate)
2. How would you describe the **current state of the** organic market (including regional variations, if any)?
3. How do you expect the organic market to develop over **the next 10 years**? (Please include important new influences not discussed in previous answers)
4. Describe the **motives you find in organic food consumers 'behaviour** (including typical consumers profile)
5. Have organic food initiatives had **an influence on economic, ecological or social development** in disadvantaged areas of your country?
6. What characteristics make an **organic supply chain or its elements successful**? (Please give concrete examples, if appropriate)

QUESTIONNAIRES

Round 2 – Questionnaire

Round 2 – Questionnaire is split in 6 different parts titled as:

1. Government & Policy Impact
2. Production
3. Market
4. Trends
5. Supply chain
6. Consumer behaviour

The questionnaires were sent by email. The survey for the 2nd round started at the end of February 2011 and was finished at the beginning of March of 2011.

QUESTIONNAIRE

The objectives of the 2nd round questionnaire are:

1. to analyze current and future impact of government and policy on the organic agriculture development.
2. the current and future interest and motives of producers to convert to organic food production.
3. to find out the relation between supply and demand of the organic market today and in the future.
4. the aim of the fourth part was to study the trends of organic agriculture concerning the level of wealth of each country, new possibilities for income and employment.
5. to investigate the weaknesses of supply chain management, specifically the distribution channels for organic products.
6. to study the consumer motivations and behaviour towards organic market.

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DELPHY 1st ROUND RESULTS IN WBC

Regarding the answers of the experts to the question of Round 1 main conclusions are:

1. The most important influences that have shaped the development of the organic market in the WB countries in the past were:

- implementation of National and EU policies and regulations concerning organic production and processing;
- government initiatives for certification organic food and incentives through the financial support to the organic food farmers.

DELPHY 1st ROUND RESULTS IN WBC

2. Although all the WB countries have good precondition for organic production because of the very clean soil, organic market of WBC is in the initial phase of development, although some countries are more developed then the others, but still comparing to the developed European countries is big difference in production and consumption.
3. The most countries export the raw organic material and then import the processed organic food.
4. There is a limited organic products offer (in terms of diversity and quantity).
5. Producers have no awareness and enough knowledge about how to produce organic products.

DELPHY 1st ROUND RESULTS IN WBC

6. Experts are aware of many opportunities for market development as for example: tourism, agro ecotourism, public procurement (schools, hospitals, door to door, internet etc.).
7. Over the next ten years, the importance of the organic market will grow. Consumers will trust local producers the most as the latter are more easily monitored. Therefore, mainly the local market (marketplaces) will gain importance. The offer will be larger and more diverse also in supermarkets.
8. Consumer's motives for buying organic food are health, trend, prestige and environmental awareness.
9. The population with higher revenues, 25 to 40 years of age, well educated is the group that represent main consumer group.

DELPHY 1st ROUND RESULTS IN WBC

10. Consumers need to be **more informed** about organic way of food production. (To visit organic farms with their children, play there and consume fresh organic food).
11. In WBC missing a good **successful distribution channels** according to the experts.
To develop a distribution channel of organic food is necessary to intensify the contacts between farmers and consumers through specialised shops, supermarkets and exporters of agricultural products.

DELPHY 2nd ROUND RESULTS IN WBC

The Delphi 2nd round survey is based on a data derived from the Delphi 1 round result.

The questionnaire is divided in 6 different parts:

1. Government & Policy Impact
2. Production
3. Market
4. Trends
5. Supply chain
6. Consumer behaviour

and consists of 229 questions that created very detailed and complex questionnaire. Likert scale (from 1-strongly disagree; 2-disagree; 3-neither agree nor disagree; 4-agree; 5-strongly agree) is applied for each question.

The survey was conducted during the February and March 2011 in all WBC.

DELPHY 2nd ROUND RESULTS IN WBC - Part 1

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 |

DELPHY 2nd ROUND RESULTS IN WBC - Part 1

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 |

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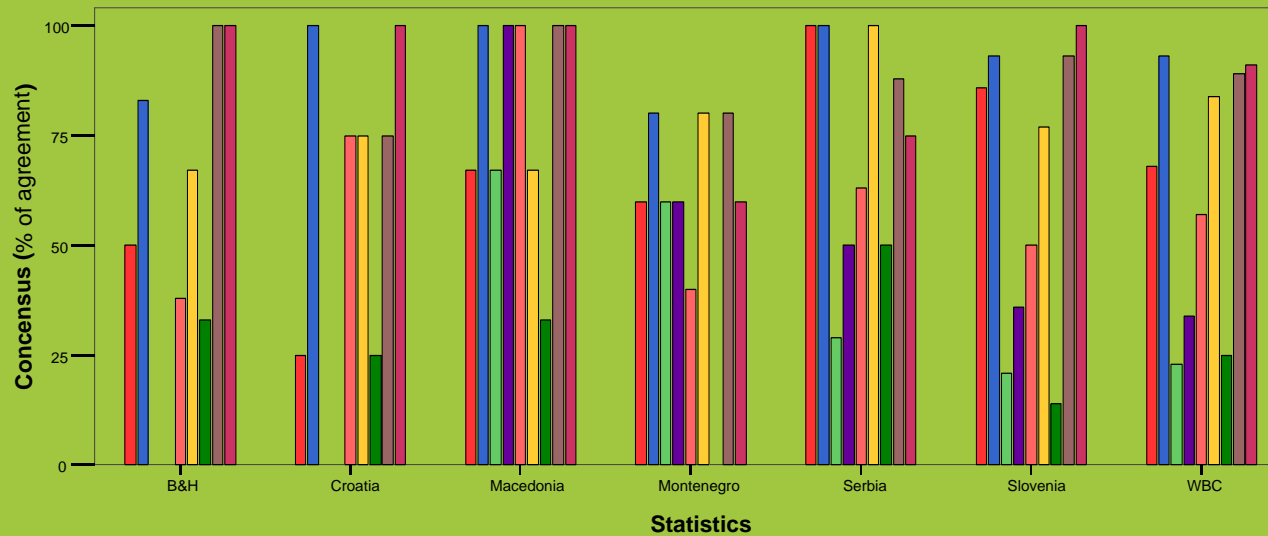
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DELPHY 2nd ROUND RESULTS IN WBC - Part 1

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

DELPHY 2nd ROUND RESULTS IN WBC - Part 1

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part1

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 |

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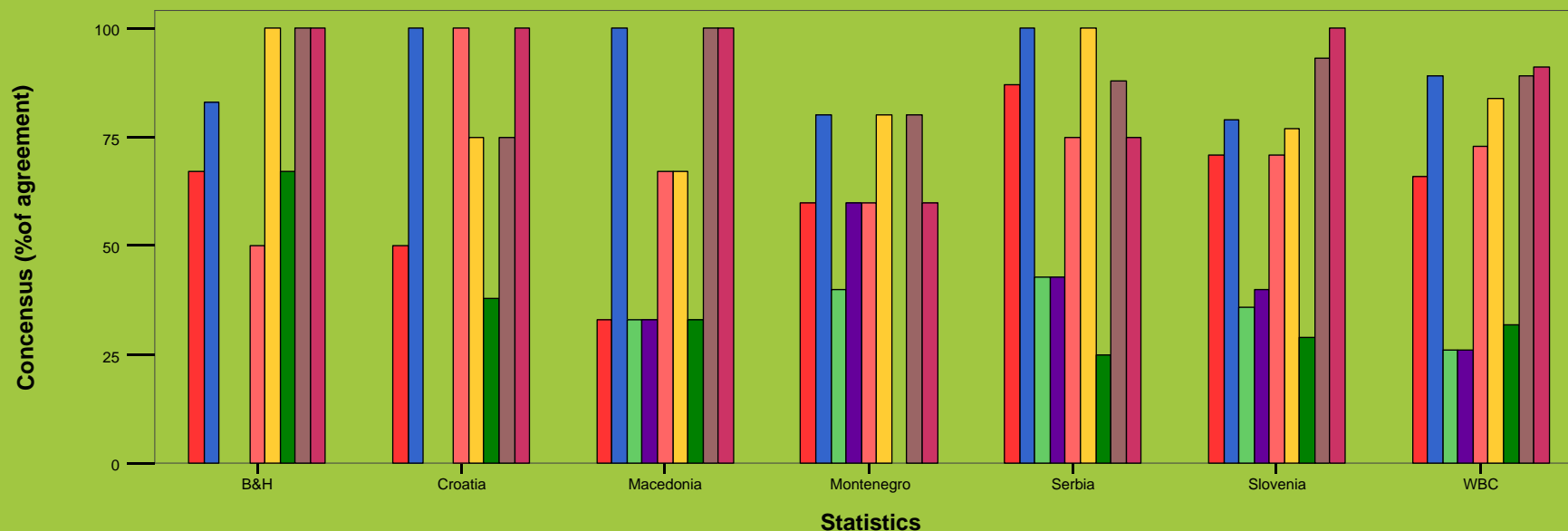
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DELPHY 2nd ROUND RESULTS IN WBC-Part1

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

DELPHY 2nd ROUND RESULTS IN WBC-Part 2

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 2

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 |

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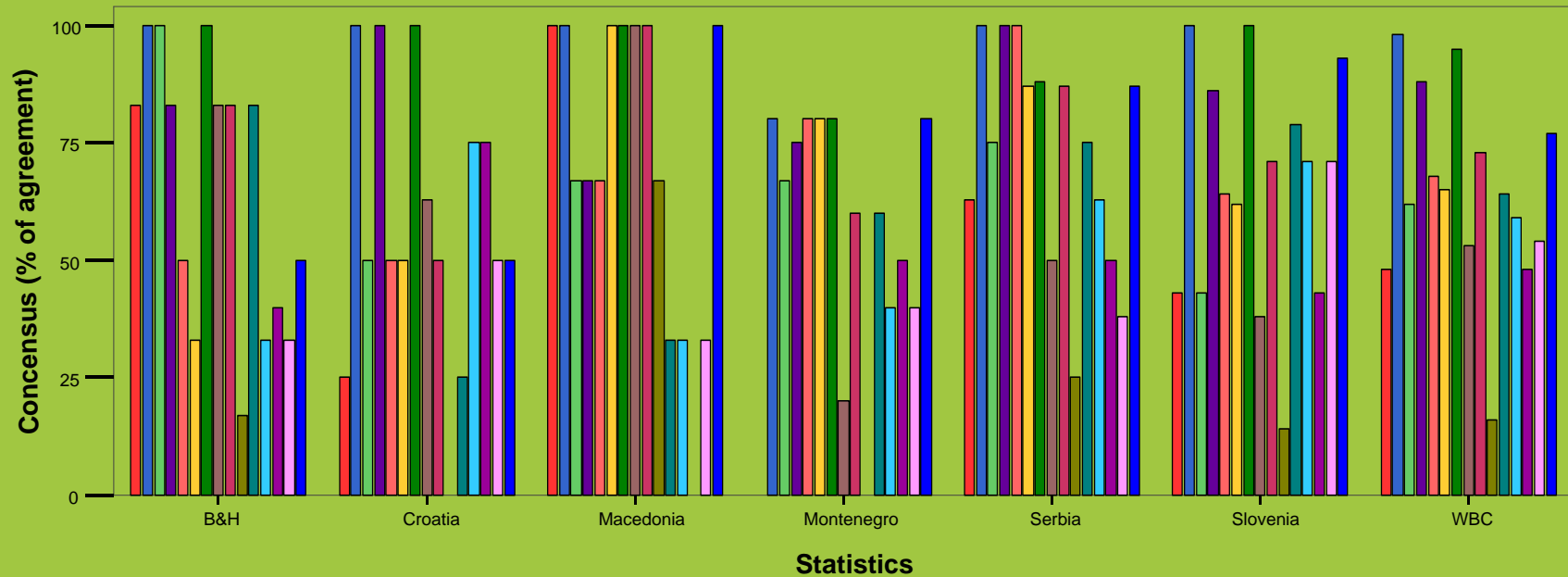
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DELPHY 2nd ROUND RESULTS IN WBC-Part 2

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

DELPHY 2nd ROUND RESULTS IN WBC-Part 2

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 2

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 |

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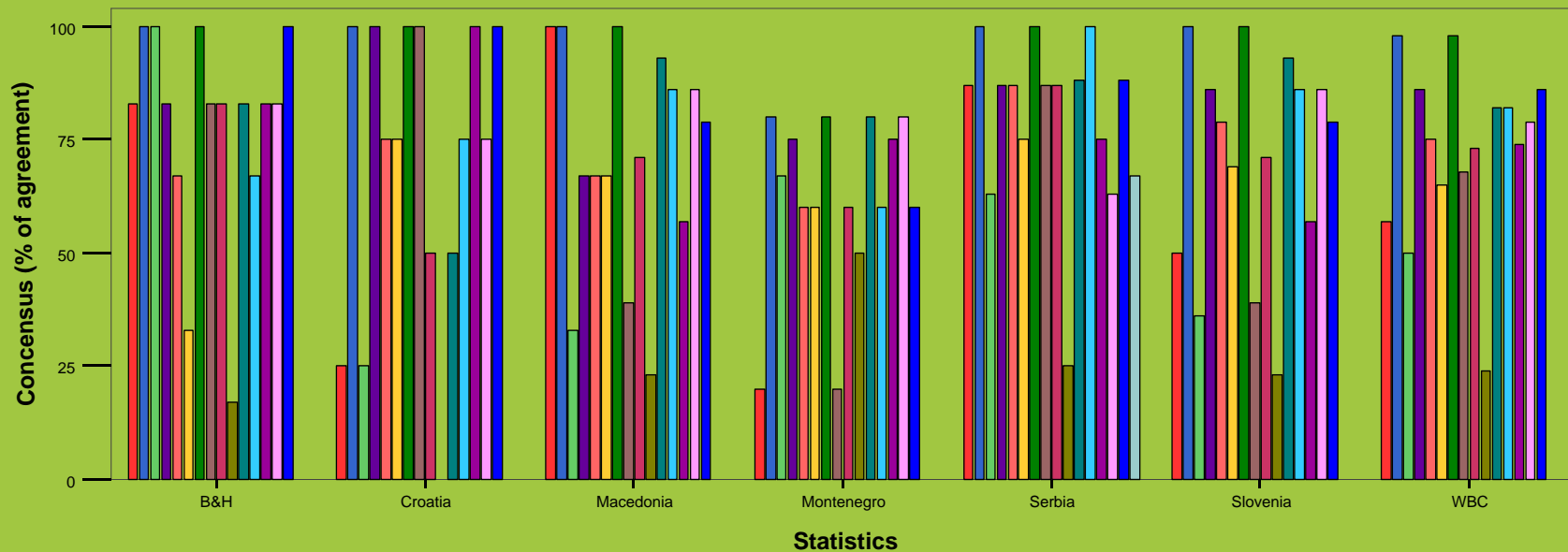
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DELPHY 2nd ROUND RESULTS IN WBC-Part 2

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

DELPHY 2nd ROUND RESULTS IN WBC-Part 3

Table 10 Market - WBC Present Situation

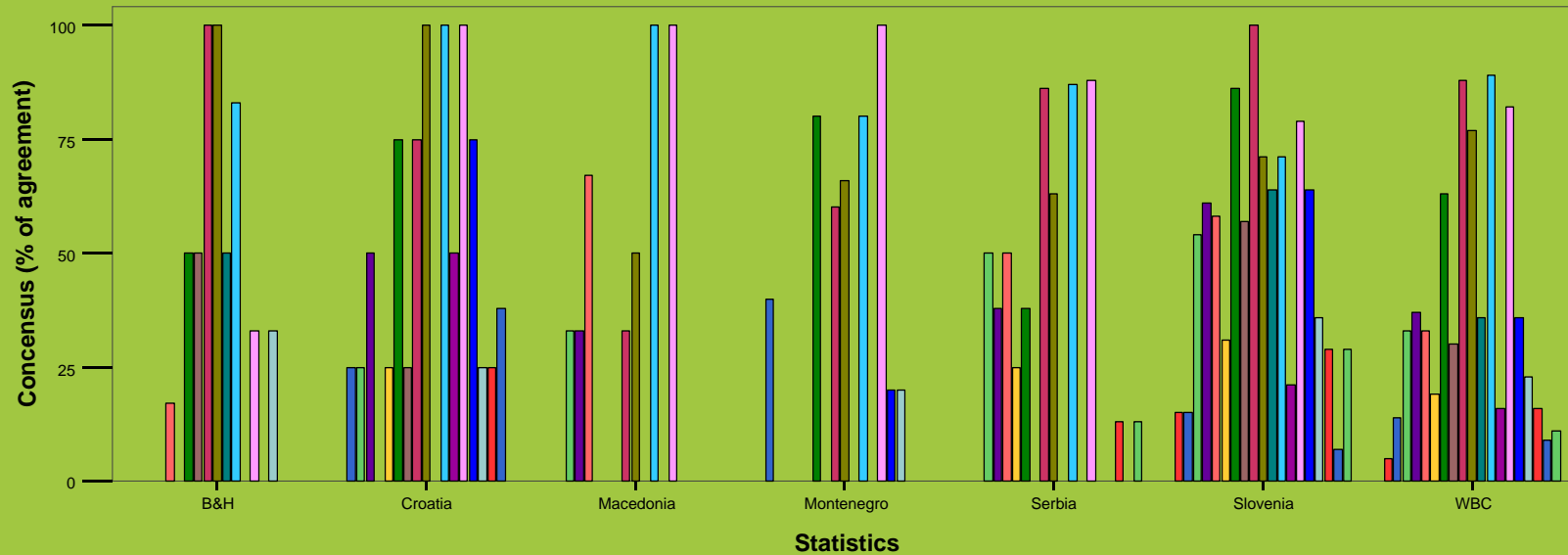
| | N | Mean | Median | Mode | Std. Deviation | Minimum | Maximum |
|--|-------|--------|--------|------|----------------|---------|---------|
| | Valid | | | | | | |
| Q51 Market of certain categories of organic products is meat | 43 | 1,8372 | 2,0000 | 2,00 | ,81446 | 1,00 | 4,00 |
| Q53 Market of 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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 3

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 |

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 vegetable
- 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.
- 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 remotied areas
- Q88 Market for organic products in certain areas is _Rural close to urban centers

DELPHY 2nd ROUND RESULTS IN WBC-Part 3

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 |

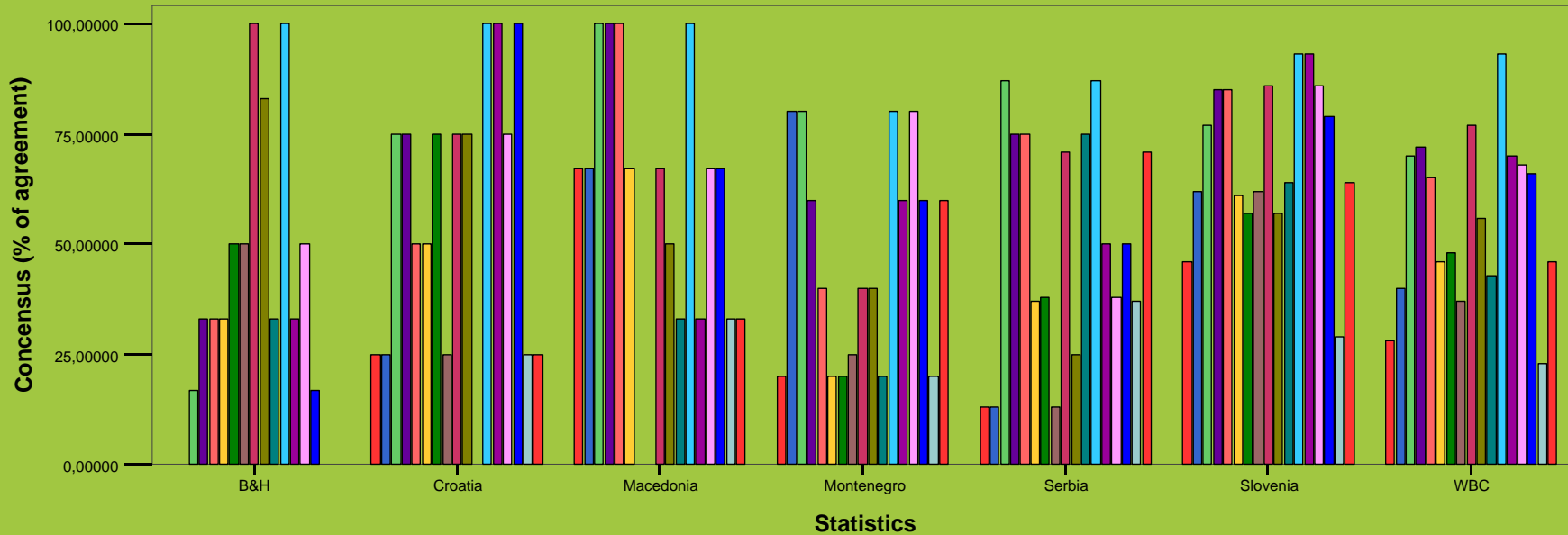
DELPHY 2nd ROUND RESULTS IN WBC-Part 3 3

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 3

Fig 6 Market WBC Future (5year) Prediction



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

DELPHY 2nd ROUND RESULTS IN WBC-Part 4

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 4

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 |

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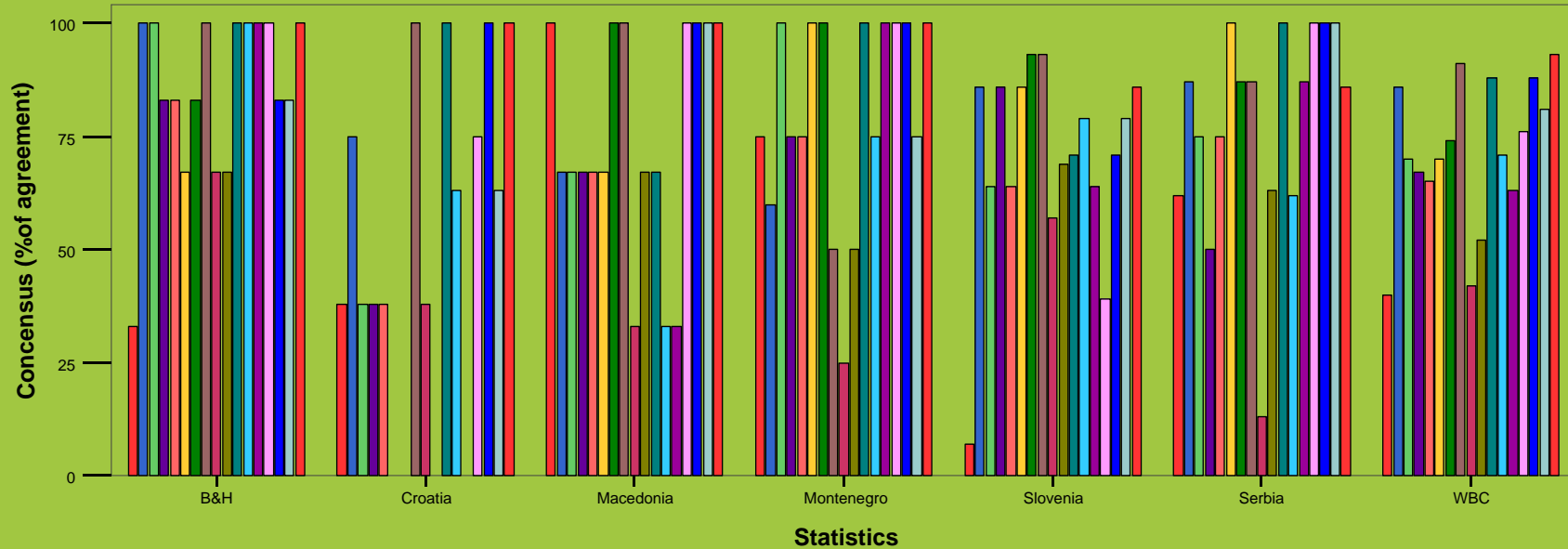
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DELPHY 2nd ROUND RESULTS IN WBC-Part 4

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.

DELPHY 2nd ROUND RESULTS IN WBC-Part 4

Table 16 Trends WBC Future (5years) Prediction

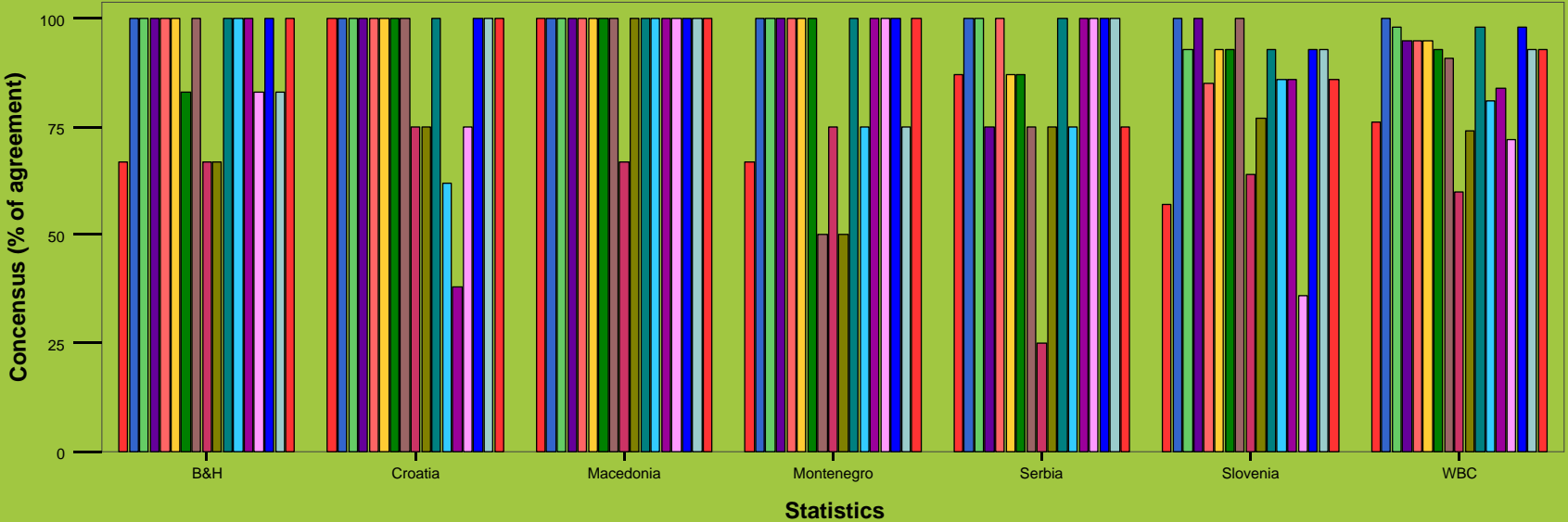
| | N | Mean | Median | Mode | Std. Deviation | Minimum | Maximum |
|--|-------|--------|--------|------|----------------|---------|---------|
| | Valid | | | | | | |
| Q91 Organic farming will spread in all WBC countries | 42 | 3,8571 | 4,0000 | 4,00 | ,56618 | 3,00 | 5,00 |
| Q93 Eco tourism is important 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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 4

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 |

Fig 8 Trends WBC Future (5years) Prediction



Variables

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

DELPHY 2nd ROUND RESULTS IN WBC-Part 5

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 diversified | 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 |

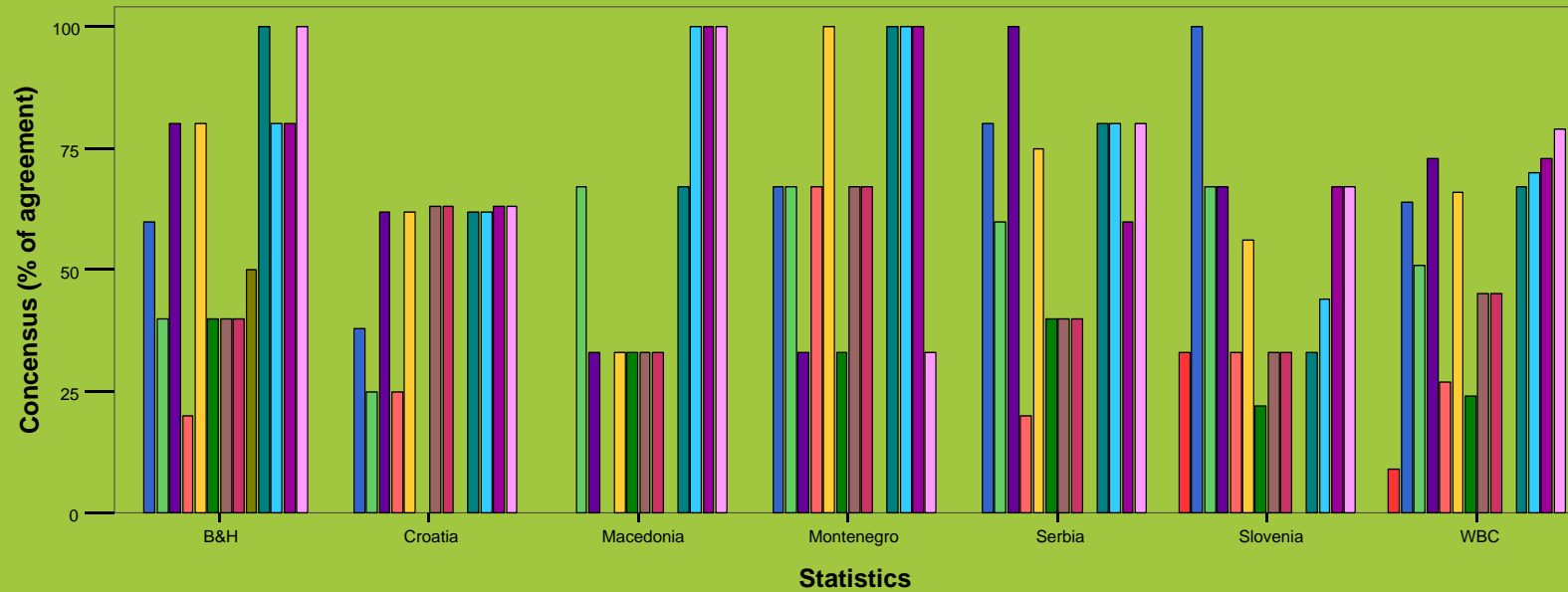
DELPHY 2nd ROUND RESULTS IN WBC-Part 5

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 5

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

DELPHY 2nd ROUND RESULTS IN WBC-Part 5

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 |

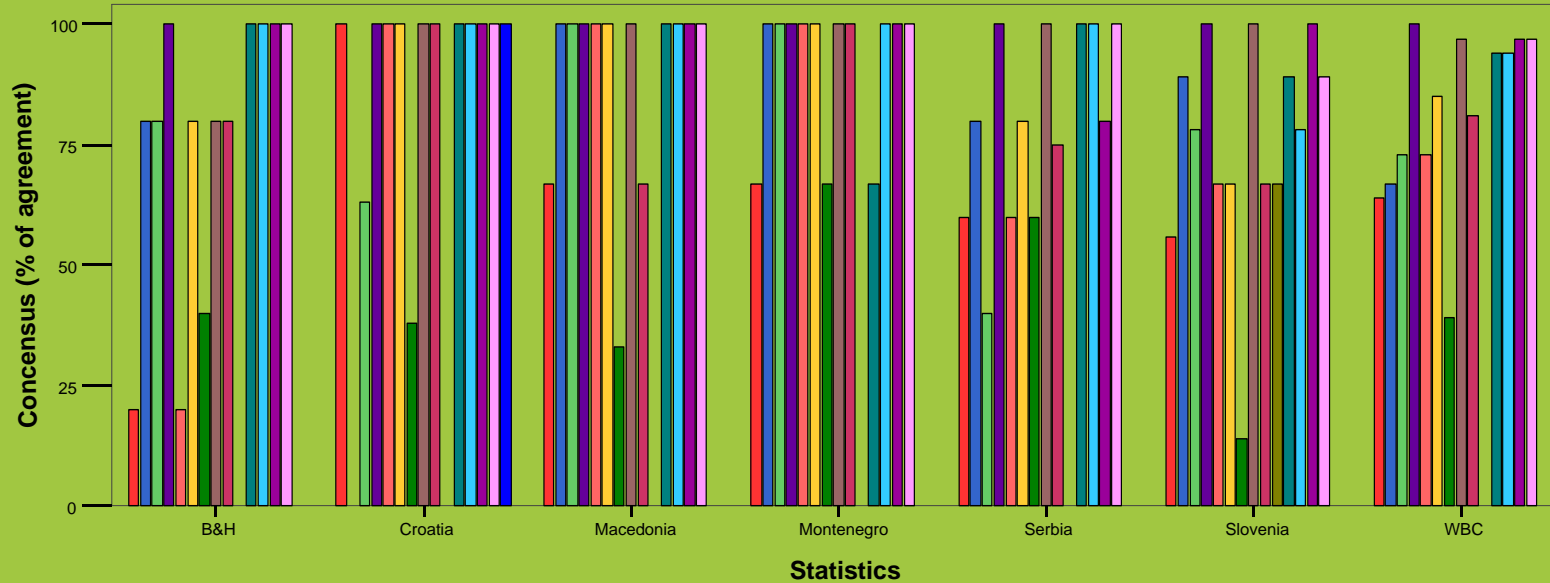
DELPHY 2nd ROUND RESULTS IN WBC-Part 5

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 5

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 fork
 - 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)

DELPHY 2nd ROUND RESULTS IN WBC-Part 6

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 | | 3,636 | 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 ^a | 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 ^a | ,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

DELPHY 2nd ROUND RESULTS IN WBC-Part 6

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 6

Fig 11 Consumer Behaviour WBC Present Situation

Statistics : WBC Countries



DELPHY 2nd ROUND RESULTS IN WBC-Part 6

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 ^a | 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

DELPHY 2nd ROUND RESULTS IN WBC-Part 6

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 |

DELPHY 2nd ROUND RESULTS IN WBC-Part 6

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



Conclusions for Part 1 - Government & Policy Impact

- 1. National development strategy for organic farming is very important. The same is expected to be in the future.**
- 2. Regional and local government support is very important for the development of the organic agriculture. The same is expected for the future.**
- 3. B&H and Croatia feel great lack of political support and adequate state incentives for organic sector. They do not expect any better in the future.**
- 4. The government should put special emphasis on the control system and certification of organic food in the present as well as in the future situation.**

Conclusions for Part 2 – Production

- 1. Motivation of the producers is important for development of organic sector. The same is expected in the future.**
- 2. Teaching and training for organic farming is necessary. The same is expected in the future.**
- 3. Financial consolidation of organic farms is necessary. The same is expected in the future.**
- 4. Horizontal cooperation between organic farmers and pooling of organic production is not much required in all countries except Macedonia. Almost the same is expected to be in the future.**

Conclusions for Part 3 – Market

1. **Clear labelling of organic products is necessary to enhance market development. Even more is expected in the future.**
2. **Distributors have higher bargaining power than producers. Somewhat less is expected in the future.**
3. **The organic market is increasing in all WBC.**
4. **Practically none of experts consider meat as a current market for organic products. Similar situation is with milk, fruit, vegetables and baby food (there are significant differences among countries). In the future experts expect strongly positive changes.**
5. **There is no market for organic products in urban touristic towns, rural touristic areas, rural remote areas and rural close to urban centres. In the future expectations are higher.**

Conclusions for Part 4 – Trends

- 1. Marketing for organic products has to be improved.**
- 2. Organic market development depends on general level of wealth.**
- 3. Organic sector brings new possibilities for income and labour. Even more is expected in the future.**
- 4. Vertical cooperation and definition of strategy are important for development of organic sector. Even more is expected in the future.**
- 5. Eco tourism is important for development. Significantly more is expected in the future.**
- 6. Organic farming is not factor of too much success for agricultural sector in all WB countries. In the future it is expected to be slightly higher.**

Conclusions for Part 5 – Supply chain

- 1. Quality management and traceability are important for a better organisation of supply chain of organic products. Even more important are expected to be in the future.**
- 2. Practically none of experts in investigated countries agree that distribution channels for organic products are numerous and diversified. Expectations for the future go in strongly opposite direction.**

Conclusions for Part 6 – Consumer behaviour

1. **Health concerns are very strong motives for buying organic food. The same is expected in the future.**
2. **Key promotional activities are education and information to consumers. Even more is expected to be in the future.**
3. **The main characteristic of organic consumer is high level of formal education. It is expected to be less important in the future. Local agriculture, traditional agriculture, small scale agriculture and traditional processing in Croatia and Macedonia don't present motivation for buying organic food. It is expected that this motivations increase significantly in the future.**