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Good Apple, Bad Apple?

How Nation Branding and other trade factors challenge Serbian Food Trade to reinvent itself

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Abstract

The EU and the World Bank agree in their analyses that Serbia has a huge comparative advantage in the fruit and vegetable sector, even though still enormous efforts are necessary to increase productivity, competitiveness and profit. Hence, the exploitation of existing potentials remains. This study examined whether there are "hidden" trade obstacles that are observed by the Serbian fruit industry but not analysed and sufficiently discussed within research.

By examining the Serbian framework conditions for producing high value and internationally competitive fruit products, a questionnaire was developed which was discussed with the Serbian direct and indirect participants of the Fruit Value Chain. Methodologically, the research work is oriented towards the Multi-strand Conversion Mixed research design as described by TEDDLIE and TASHAKKORI. With regard to their propositions, the calculations made by means of the Gravity Model were limited to the examined bilateral trade between 20 exporting and 6 importing EU countries. The analysis was able to prove that both trade-restricting and trade-facilitating influence factors are perceived within the Serbian food supply chain; factors which, in their combination, seem to be Serbia-specific. The research described within this research paper identifies five factors that significantly and highly-significantly influence the Serbian bilateral fruit trade: *Transport Costs, Size of Parcells, Nation Branding, Clustering* and *Service Orientation*

Even though further calculations with a more customized and specific data set have to be done in order to be able to analyses these implied correlations, the results confirm a surprisingly highly significant impact of a country's national image for its fruit exports. This can be explained by the fact that food is a "confidence good" which is highly dependent on a positive association like benefits for health, a positive identification with a group or region, life style, indulgence, vacation memories, etc. Having negative associations with products therefore is especially disruptive for the food and nutrition sector.

The presented findings could, on the one hand, form a basis for further, more specified and comprehensive empirical analyses and could, on the other hand, serve to support the economic integration into international markets by way of removing or correcting the above-mentioned factors.

KEYWORDS: Gravity Analysis; Triangulative "Conversion Mixed Methods" Research Design; National Image; Food Supply Chain; Trade Effects

1. INTRODUCTION

The present paper presents the results of a comprehensive quantitative and qualitative study of the Serbian fruit sector and shows how competitiveness could be increased.[1] Increasing the Serbian competitiveness is even more pressing if one considers the stumbling overall economic development in Serbia.

According to the WORLD ECONOMIC FORUM and its yearly analysis of the international economic competitiveness of nations, in the year 2016 Serbia was ranked on the 90th rank. Benchmarking 138 countries, Serbia is economically more competitive than Ecuador and the Dominican Republic but less than Namibia and Algeria. Since 2008, Serbia has deteriorated by five places. In 2008, the country occupied the 85th place, where it was positioned ahead of Jamaica and behind Guatemala. Simultaneously the WORLD BANK regards the basic conditions for being economically active in Serbia as only slightly better than in Mauritius (WEF, 2016; WORLDBANK, 2016). Moreover, Serbia's worker productivity is half as high as that of e.g. Slovakia, but at the same time its unit labour costs are in average substantially higher than the labour costs paid by its competitors.

In December 2013 the Council of the European Union approved opening negotiations on Serbia's accession in January 2014, and the first Intergovernmental Conference was held on 21 January at the European Council in Brussels. In the course of the preparations of a potential future EU membership, the EU analysed economic sectors in Serbia in order to detect especially economically promising branches. Four areas of high interest were highlighted. Amongst those the EU identified the fruit sector as one of the most worthy to support. Likewise the WORLDBANK confirms a huge comparative advantage within the fruit and vegetable sector in Serbia even though still enormous difficulties in increasing productivity, the competitiveness and profit and hence in the exploitation of existing potentials remain.

Finding the determinants of increasing these factors will be the key to a successful transformation of the Serbian agricultural production. Influential factors to the bilateral Serbian fruit trade have been detected within this research and will be described within this paper in order to support the Serbian agricultural to exploit its potentials. Apart from the economic and entrepreneurial challenges, it has to be kept in mind that 2/3 of Serbia is agriculturally utilizable, huge amounts of black earths and a high biodiversity are available, approximately 22% of the labour force is working in the agricultural sector which accumulates 20% of the gross exports. In addition to this, the world-wide demand for Serbian fruit increases. But taking a closer look at the GDP, it becomes clear that even though the export of Serbian fruits rises, the sectoral contribution to the GDP is lower than expected in view of the current export volume, and lower than in almost all other countries of Europe (WORLDBANK, 2011).

This raises the question whether the export volume is mainly dominated by the export of low value-added fruit products which only can obtain a low retail price. And if so, with the given resources and climatic prerequisites and the existing soil quality, should it not be vice versa?[2]

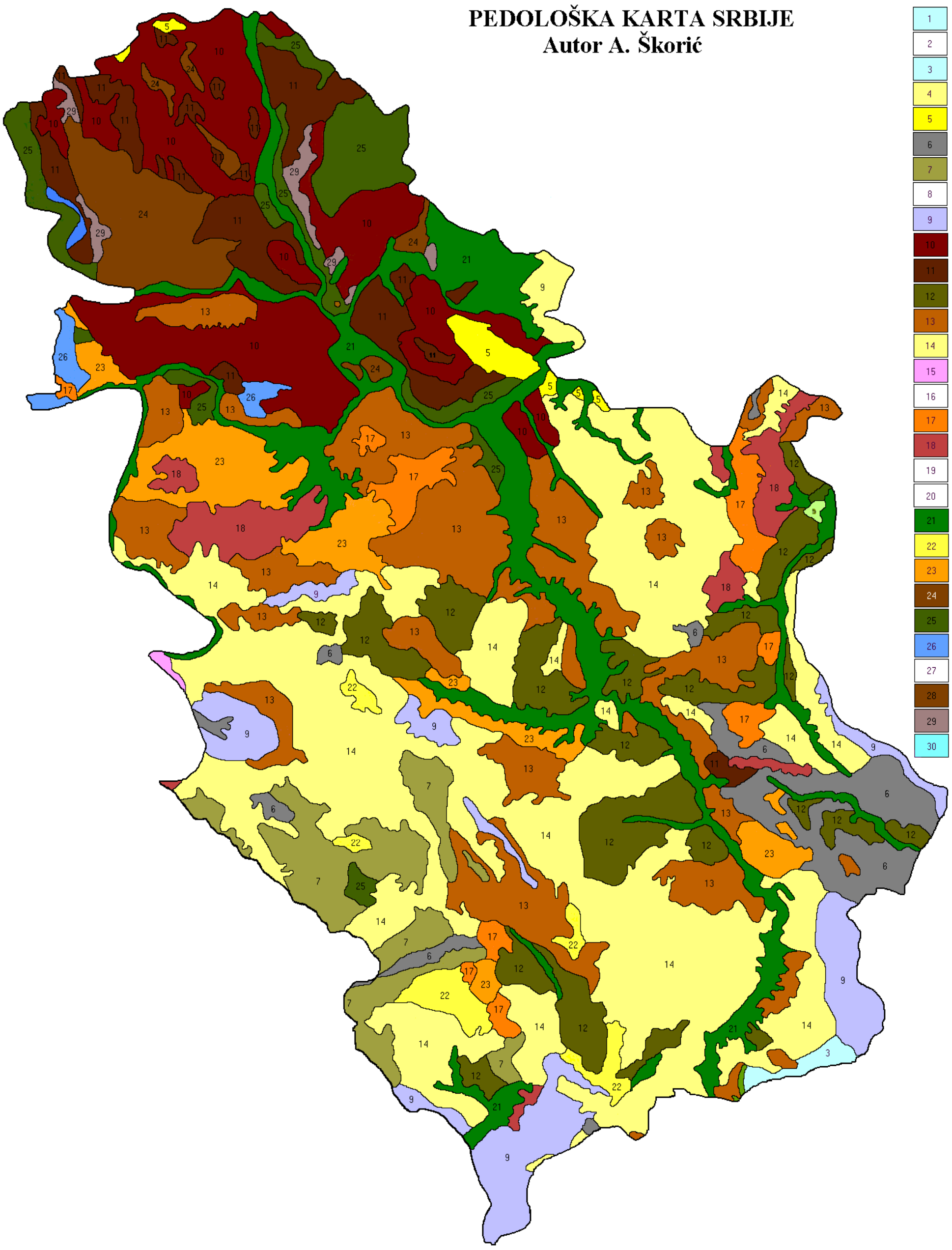
Problem Statement

Studies show that the export value of agricultural products from Serbia has an average value of 0,53 €/kg. The import value in contrast lies at about 1,07€/kg. 66% of Serbian agricultural exports are raw materials and semi-finished goods whereas the import is a portfolio of more refined semi-finished and finished food BOGDANOV u BOZIC, 2008 and 2010, WORLD BANK, 2011b). In addition, it is remarkable that even within the sector of highly demanded fruit, the Serbian fruit/kg export prices are lower than its competitors export prices. Being more specific and comparing the average export prices of strawberries, cherries and other berries, the prices Serbia achieves are lower than the prices countries with a similar fruit export portfolios like Greece or Bosnia and Herzegovina achieve.

Figure No 1: Soil Characteristics in Serbia[3]

[1] The results are based on Kolundzija, "Exportdeterminanten serbischen Obstes" (2014). The data sets is on file with the author
[2] TENBROCK, C.: *Ein Land sucht Anschluss*, **ZEIT ONLINE** GmbH, Edition 01-10-2013, http://www.zeit.de/2013/03/Serbien-Europa-Wirtschaftskrise, effective: 02-13-2013; WEF: *The Global Competitiveness Report* 2008/2009, *2012/2013 and 2013/2014* https://members.weforum.org/pdf/GCR08/GCR08.pdf and http://www3.weforum.org/docs/WEF_GlobalCompetitivenessReport_2012-13.pdf ; WORLD BANK: *Doing Business 2013 - Smarter Regulations for Small and Medium-Size Enterprises;* http://www.doingbusiness.org/~/media/GIAWB/Doing%20Business/Documents/Annual-Reports/English/DB13-full-report.pdf, effective: 02-13-2013

Proceeding from this conspicuousness a research concept has been created which compares Serbia to 19 countries with



[3] Key to figure 1: 1. Karst (rocky soil) with spots of terra rossa, brown soil and lithosol; 2. Lithosols and eutric cambisol 3. Lithosols on acid rocks and rankers; 4. Regosols, rendzinas and eutric cambisols; 5. Arenosols and Eutric cambisol on sand; 6. Lime dolomite black soils, lithosols and rendzinas; 7. Lime dolomite black soils, cambisols and terra rossa; 8. Rendzinas and regosols; 9. Rankers and distric cambisols; 10. Chernozem on loess; 11. Chernozem and chernozem-semigley soil; 12.Smonitzas 13. Eutric cambisol; 14. District cambisols, luvisols and calcocambisols; 18. Luvisols; 19. Pseudogley soils and rendzinas; 20. Acrics oil and cambisols on limestone; 21. Fluvisols and eugleys; 22. Pseudogleys; 23. Pseudogleys and ilimerized pseudogley soils; 24. Chernozem-semigley soil; 25. Humogleys 26. Gley and semigley soils; 27. Eugleys; 28. Histosols; 29. Halomorphic soils

geographically similar preconditions and/or similar fruit exports in order to understand the sources of this discrepancy in obtained export prices.[4]
In a first step, it was examined whether the focus group achieves higher export prices for strawberries, cherries and other berries. The average export price for these goods was about 2,83USD/kg. By comparison, the average export price of strawberries, cherries and other berries from Serbia is about 1,37USD/kg. Hence the questions arises whether other export relevant factors beside the already known determinates like exchange rates, inflation, interest rates, current-account deficits, public debt, terms of trade, political stability and economic performance exist which limit the Serbian export value and volume? And in the case of their existence, do they as well hinder the focus group?

An oft-discussed factor which allegedly contributes to lower (export) productivity is the size of the utilized agricultural areas (UAA) per holding. And indeed, as a matter of fact, Serbia is challenged by a high defragmentation of its arable land. As indicated in the table below almost 77% of the private holdings in Serbia are producing on fields smaller than 5ha. 41, 9% of the whole utilized agricultural area of Serbia is tilled that way. Only 6% of holdings operate on parcel sizes that correspond to the average parcel size in Germany. Operating on small sized parcels and consequently with a lower usage of economies of scale, higher pressure on delivering contractually committed qualities and quantities of their products, higher volatility especially when it comes to price changes of operating consumables, retail prices, delayed customer payments which in sum disembogues to a higher effort of being and staying competitive and protecting their market share.

Table No. 1: Utilized Agricultural Areas (UAA) per Holding in Serbia (2002)

UAA/Holding	Nr. of agric. holdings (%)	Utilized Agric. Area (UAA) (%)*
Total	100%	100
Up to 2 ha UAA/Holding	46%	12,1
2 ha - 5ha UAA/Holding	31%	29,8
5 ha - 10ha UAA/Holding	17%	33,4
10 ha - 20 ha UAA/Holding	5%	17,5
More than 20 ha UAA/Holding	1%	7,2

*referring to private equity, private holdings
Source: SORS, ACROTRASS-CONSORTIUM, 2006, S.12 (Census, 2002)

The mission of the Serbian government is to lead its agricultural sector and their farmers through the urgently needed transition phase. But since the full market liberalisation of the national market of agricultural-food products is around the corner, the farmers are running out of time in order to adapt their production to be able to compete with international competitors. Previously the high import duty protected Serbian producers on the local market. But due to the already initiated market liberalization for EU imports the duty of EU agricultural imports will be decreased to an average of 1,7%. Consequently the Serbian consumer market will then be more profitable for European producers and new competitors, which will further increase the pressure of competition on the local producers. This period is extremely critical to the existence of the SME since the national market is about to adapt to the international markets without additional funding for the SME to adapt to the new circumstances.

The phase between the starting date of a fully liberalized national agricultural market and the starting date of de facto obtaining financial supports e.g. as new members to the EU in order to adapt to the changed circumstances is very critical and needs quick adaptation.

Aiming to support a quick adaptation and higher value exports, the question of what limits the Serbian bilateral agricultural trade in volume and value and how these factors hinder the focus group was raised within this research context. The goal of the mentioned research project was to identify the so far hidden determinants that hinder the export development. Shedding light on these factors is a first step in order to overcome them and to support farmers to increase their competitiveness. Bearing these questions in mind, a research design was compiled that enabled the immediate integration of the collected data and lead to new insights into the agricultural supply chain in Serbia.

[4] The 21 compared countries were Albania, Algeria, Armenia, Bosnia & Herzegovina, Bulgaria, Egypt, Greece, Israel, Croatia, Lebanon, Libya, Montenegro, FMR Yugoslavia, Turkey, Morocco, Poland, Portugal, Kyrgyzstan, Romania, Tunisia and Hungary. In the further proceeding the three countries Kyrgyzstan, Libya and Armenia could not be integrated in the statistical evaluation due to a huge lack of data.

2. RESEARCH DESIGN AND METHODOLOGY

In order to analyse the existence of further export influences and their impact on comparable competitors, the study was divided in three steps:

- A sectoral desk research and analysis of the competitiveness of the Serbian fruit sector: focussing on economic and political circumstances and analysing the market forces (PORTER's Diamond Approach) and the strengths, weaknesses, opportunities and threats of the fruit sector. Having understood the economic, political, cultural, geographic and topographic prerequisites, determinants that might be responsible for the low (fruit) export value and volume, were distilled into a questionnaire.
- Two qualitative empirical analyses: the above-mentioned questionnaire was used to interview people working in the Serbian agricultural branch. The objective was to falsify, verify or complete the collected determinants. Within this branch study, 141 organisations, universities, governmental and non-governmental institutions, customers, financial institutes, etc. active in Serbia were interviewed. According to their answers, the questionnaire has been adapted in order to guarantee a comprehensive discussion of relevant issues. Within a second qualitative empirical analysis, 37 interviews were carried out along the Serbian fruit value chain. At least one in-depth-interview with every actor of the value-chain has been conducted. In its subsequent evaluation, the herein detected obstacles were clustered and then backed with quantitative data material[5] in order see how Serbian exporters are positioned within the comparison. According to the interviews, 17 export determinants were distilled. These are: high transport costs, low processing stage, low customer-driven mind-set, low further product diversification, low accessibility of marketing and sales structures, size of UAA, low degree of mechanization, low aim of building clusters and cooperatives (shared economy), low investing and refinancing possibilities, unfavourable nation branding, lack of market transparency/information asymmetries, high corruption, low knowledge of markets by the agricultural actors, low training of staff and trainers, low support of the fruit sector by the government, low appreciation of quality certificates and still existing tariff and non-tariff barriers to trade.
- The accumulated data material was as well used for an econometric analysis according to the original formula used by DE BENEDICTIS u. TAGLIONI (2011), in order to detect the influences of the identified factors on the compared group of 19 countries plus Serbia (focus group).[6] The enhanced gravity approach analyzed the bilateral fresh and processed fruit trade between the focus group countries and six exemplary EU countries.[7]

Figure No 2: Adaptation to the known research context

(1.)

$$\underbrace{\lg X_{ij}}_{\substack{\text{Bilateral}\\ \text{Trade}}} = \underbrace{\lg b_0}_{\text{constant}} + \underbrace{b_1 \lg \mathrm{I}_i}_{\substack{\text{total import}\\ \text{(demand)}}} + \underbrace{b_2 \lg \mathrm{E}_j}_{\substack{\text{total export}\\ \text{(offer)}}} + \underbrace{b_3 \lg \mathrm{T}_{ij}}_{\text{Transport costs}} + \underbrace{\sum_{k=4}^{K} b_k \lg V_{kj}}_{\text{semi-economic factors}} + \underbrace{e_{ij}}_{\text{Random error}}$$

X_{ij} = bilateral trade between country i and country j

Country i = eines der sechs importierenden EU-Referenzländer

Country j = eines der 20 exportierenden Vergleichsländer (inklusive Serbien).

b_0 = Gravitational constant

I_i i = total international fruit import of country i (Variable 1).

E_j = total international fruit export of country j (Variable 2),

T_{ij} = real transport costs for exporting from country j to country i (Variable 3) and

V_{kj} = empirically extracted potential influencial determinantes for the fruit export of country j (Variable 4 to 19)

Modell was calculated for export value and volume for processed and fresh fruit exports

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[5] Source. World Economic Forum. It should be noted that the quantitative data relating to the economy as a whole, whereas the qualitative data are Serbia-specific and agro-specific

[6] The 21 compared countries were Albania, Algeria, Armenia, Bosnia & Herzegovina, Bulgaria, Egypt, Greece, Israel, Croatia, Lebanon, Libya, Montenegro, FMR Yugoslavia, Turkey, Morocco, Poland, Portugal, Kygyzstan, Romania, Tunisia and Hungary. In the further proceeding the three countries Kyrgyzstan, Libya and Armenia could not be integrated in the statistical evaluation due to a huge lack of data.

[7] Germany, England, Sweden, Netherlands, France and Austria

The aim of this analysis was to receive a generally valid statement for the focus group so that the Serbian exporters could deduct actions and ideas along the significant factors in order to become more prepared and thus more competitive.

3. RESULTS

Validating the results received from the qualitative study with the statistical calculation of the econometric methodology, five factors of the collected 17 export determinants have been identified as either significant or highly significant[8] for the exporting countries[9]:

Table No. 2: Confirmed Determinants

Influencing factors	Measured in	Simple Comparison of Data		Econometrically confirmed influence	
		Serbia	Average of Study Group	Processed fruit	Fresh fruit
1. Transport Costs	Distance (Km; capital to capital)	2.100	3.540,84	√	√
2. Size of Parcels	Utilized agricultural area (ha) per holding	3,93	9,47	√	x
3. Nation Branding	WEF Likert Scale 1-7 (1= low, 7=highly competitive)	2	3,16	x	√
4. Clustering		2,6	3,07	x	√
5. Service orientation		3,8	4,49	√	x

1. **Transport Costs (highly significant):** real freight costs for the transport (freight offers were requested from different transporting companies for full truckloads of fruit, no special treatment, incl. road and toll charges; calculated for 120 transport routes[10]).

2. **Size of Parcels (highly significant):** absolute size of the UAA per holding.

3. **Nation Branding (very significant):** Associations with the country measured by risk estimation on economic and political situation given by locally active enterprises[11]

4. **Cooperating Depth/ Interconnection within Clusters/ Associations (very significant):** low number of clusters/associations, low interconnectivity within value and supply chain, low communication intensity between the individual participants of the value/supply chain

5. **Service Orientation (significant):** low adaptation of products/services to actual customer needs

Coping successfully with these five factors has a high or at least significant effect on the bilateral fruit trade within the focus group.

[8] 0,1 > p > 0,050 low significant (*)
0,050 > p > 0,010 significant *
0,010 > p > 0,0010 highly significant **
0,0010 > most highly significant *** (ZÖFEL, 2000, p. 63)

[9] Sources: On file with author. Further and detailed information can be provided. Please send therefore an email to ewk@uni-bonn.de

[10] Taking the geographical centre of each country (20 countries within the focus group) to the capital of the 6 importing EU-counties which were analysed

[11] Data based on studies published by the WEF and Coface Austria (2010-2011)

Position within the focus group

Knowing the significance of these factors, the next question was to see how Serbia is positioned within the focus group when it comes to coping with the requirements of a successful fulfilment of these factors. Compared with the focus group, Serbia finds itself almost in every analysed factor beneath the group average. As the table below shows, the Serbian average UAA/holding has a size of about 3.93ha whereas the group average lays about 9,47ha/holding. Comparing the national ratings on service orientation and the intensity of a functional and informational interconnectivity within the value and supply chain within the focus group, Serbia is far below the group average. These ratings are given by estimations of enterprises which are economically active in one of the countries of the focus group.

The low motivation for building clusters might be as well rooted in a historic mistrust in associations, but as this is just an assumption, its validity has to be proven by the specific comparison of the cluster development in other Ex-Yugoslavian states. The low adaptation to customer needs might as well be a heritage from this era and an indication for an only slowly changing perception of customer service; however, this has to be proven as well. Within the qualitative interviews, the interviewees described a subtle hesitation of the final customer to buy products directly declared as "made in Serbia".[12] The partners declared the reservation with negative associations originated from the war in the 1990ies and what could be called "a negative nation branding".

Foreign and local companies working in Serbia confirm a certain hesitation (WEF; Coface Austria). The WEF, as the initiator of this survey, asked entrepreneurs in more than 130 countries, how they would rate the country risk of the country they currently work in. Comparing Serbia's position within its peer group, it is seen that the local political and economic conditions are estimated as far more unstable then in the other 19 peer countries. Surprisingly, the importance of this factor could be confirmed within the econometric models.

Table No 3: Position within the Confirmed Determinants		
Influencing factors	**Simple Comparison of Data**	
	Serbia	**Average of Study Group**
1. Transport Costs[13]	2.100	3540,84
2. Size of Parcells[14]	3,93	9,47
3. Nation Branding[15]	2	3,16
4. Clustering	2,6	3,07
5. Service Orientation	3,8	4,49

Even though further calculations with a more customized and specific data set have to be done in order to be able to analyse these implied correlations, the results confirm a highly significant impact of a country's national image for its fruit exports: Food is a "confidence good" which is highly dependent on a positive association like benefits for health, a positive identification with a group or region, life style, indulgence, vacation memories, etc. Having negative associations with products therefore is especially disruptive for the food and nutrition sector.

Last but not least, it shall be mentioned that Serbia has at least one remarkable ace upon its sleeve: its favourable geostrategic position. Comparing the real transport costs within the focus group, the Serbian transport costs are far below the average of all group members.

12 37 actors of the Serbian value and supply chain were interviewed (e.g. from the production, preparation, transport and consumption of Serbian fruit)
13 Distance (Km; geographic center to capital)
14 Utilized agricultural area (ha) per holding
15 WEF, Coface Austria et al. Likert Scale 1-7 (1=low, 7=highly competitive)

4. Findings and Recommendations

The analysis shows that besides some already well-known determinants, additional significant or highly significant factors exist which influence trade and which are extremely relevant for Serbian fruit trade. Particularly lower transport costs, bigger fields, a positive national image, a higher intensity of collaboration and a more customer-oriented service are determinants that positively influence the export volume and value within the bilateral trade of this peer group.

The studies within this research context have proven that additional important trade influencing factors do exist, but that

- Serbia is in the group trend in terms of quantity and value, which means that there is no particular disadvantage in Serbian bilateral fruit commerce to the 6 EU member countries,
- the significance of determinants shows that especially the micro and meso economic factors restrict the export,
- The impact Serbian companies itself have on influencing the bilateral trade is higher than expected

This means that the cause of low product prices for exported fruits is to be searched within the entrepreneurial and industry levels in order to increase the competitiveness and the addable value of the products. The study could not prove an often politically suspected intentional exclusion of Serbia from the market. Starting from both studies' points of intersection, state programmes as well as private initiatives should be developed along the abovementioned factors perceived as trade restricting, as shown with very broad suggestions for three of the five factors in the chart below. It has to be taken into consideration, however, that the interpretation range of the discovered trade restricting determinants is limited. In qualitative empiricism it is limited to the Serbian agricultural sector, and in quantitative empiricism to an examination of trade restricting export determinants compared between countries.

A better understanding and consideration of the analysed factors should form the basis for far-reaching macro- and micro economic reforms and strategies of action. As the determinants that were ascertained quantitatively mainly validate entrepreneurial competencies as trade relevant, the state's role should be to support businesses in this regard and to further consolidate market competencies.

Apart from ongoing efforts aiming at macroeconomic stabilisation, the state could particularly rethink its agricultural policy. The strategies and programmes not yet adapted to the needs of agricultural businesses, the unclear ministerial responsibilities and the short-term support measures should be synchronised in favour of future-oriented investments in market-building mechanisms, higher resource mobility and structural transformations.

Table No 4: Possible Short-, Mid- and Long-Term Measures

Determinants	Aims	Short-term actions	Mid to Long-term actions
Transport Costs	Improved infrastructure	Cooperation with international logistical services	HUBs; cold store; transport routs; etc.
Nation Branding	Rebuilding and strengthening the positive image	Enhancing the service offers, Increasing touristic attractiveness; Exploring Trade possibilities to Russia, China and the Middle Eastern markets	Intensifying trade; attracting FDI; modern tourist structures, customer orientations
Small Scale Farming	Transforming the farming structures	Professionalizing the SME; Integrating them into supermarket value chains; Increasing the efficiency of supply and distributions channels	Market adaptations through e.g. cooperation (group certificates, support in modernizing the processes)

Additionally, parallel to the ongoing efforts to achieve sustainable economic growth and macro-economic stabilisation, the Serbian government could give businesses the opportunity to serve the international demand for goods and services up to their maximal abilities by employing training and subsidy programmes and adapting their support measures. In addition, the huge liberalisation of the Serbian market should and will be further pursued and reforms endorsed. The agricultural sector's numerous SMEs, however, are still far away from being able to compete with international suppliers on international markets. Here, the state could help them to stay competitive on the national market and become more competitive internationally and be able to conquer new consumer markets by modernising infrastructural and institutional parameters, as well as by supporting knowledge capacities and by reducing bureaucratic hurdles. Furthermore, the fallow areas should be included in the national production to a larger degree by increasing the areas' infrastructural cultivation so that the production volume is increased and Serbian production capacities could work close to full capacity.

Apart from institutional reforms based on the determinants qualitatively established for the Serbian agricultural sector and from the quantitatively determined variables gathered for the country group, not only the public authorities are responsible, but as well the SMEs themselves. They have, as the study has shown, to a large extent not yet used their potential to increase individual competitiveness. A process modernisation in order to maximise output and reduce costs should be more comprehensively considered, as well as a stronger orientation towards customers and markets. The needed product adaptations should under all circumstances be carried out based on soil quality, which is quite diverse throughout Serbia. Here, the region specific and climate-induced dangers for the harvest should be considered by e.g. consulting other experts.

As the agricultural sector is imbued with SMEs, a tighter collaboration or appropriated merging of businesses into bigger operating entities could be a way for them to activate economies of scale for themselves and to act e.g. in the spirit of WEITZMAN's share economy approach. Here, purchasing associations for operating resources, combined certifications, machinery rings, harvesting communities, etc. could provide a pragmatic approach to implement a business management which is as cost-efficient as possible, and to speedily drive on an adaptation to future market requirements.

In addition, Serbian businesses should analyse where some competitive advantages already exist, and use those to further develop or to adjust their business accordingly. Serbia's competitive advantages seem to be especially in processing and modifying its classic product divisions and in the further development of niche products. In doing so, agricultural businesses should concentrate on the most profitable and emerging product divisions - such as fresh fruit and vegetables, milk and frozen meat - to transform the factor-based advantage via modification into a long-term competitive advantage (WORLD BANK, Volume 2, 2011).

Nevertheless, the studies conducted within this research context prove that the Serbian entrepreneurs should be encouraged to become more active and ask for the industry to support them, since both can to a large extent shape the significant trade influencing factors even within a rather unfavourable framework. The conventional view of waiting for the state to prepare the perfect circumstances therefor is obsolete. Supporting and empowering the entrepreneur through creating structures and abilities that enable the entrepreneur to cope with the challenges that occur and influence his/her decisions and to support him/her to open up to new choices is how Serbia could reinvent its fruit industry more broadly.

5. Conclusion and Outlook

Compared with the focus group, the empirical studies have shown that Serbia's position within the significant trade determinants is almost completely below average. Only within one highly significant variable Serbia takes the lead. If it comes to "Transport Costs", Serbia delivers at a noticeably lower price than the other examined countries. This once more highlights Serbia's geostrategic advantage concerning the proximity to the targeted markets.

The analysis shows as well that rather national factors prevent Serbia from developing the needed competitiveness quickly and increasing its export values than other external tendencies that have been measured. It is incumbent on Serbia's agricultural businesses to now decide which competitive advantage they want to strengthen and which of the accessible markets they want to supply. Instead of just looking in one direction, the future of Serbia's agriculture could also lie in supplying the South-Eastern Asian and Middle Eastern markets. If the Serbian agricultural businesses manage to adapt their goods to the local needs, an exploration of these emerging markets along and at the end of the pan-European traffic corridors VII and X could become a profitable venture.[16]

[16] These corridors connect the EU market to the south-eastern and eastern markets.

Bio-Note on the Author

Eli Wortmann-Kolundžija studied Business Economics in Germany, France and Greece. Immediately after her studies she worked at the local GIZ (German Association for Technical Cooperation) office in Sarajevo. From 2004 – 2009 she was a project coordinator at the agricultural cooperative Raiffeisen Waren-Zentrale Rhein-Main eG. Supported by the GIZ and funded by the DAAD (German Academic Exchange Service), she did her field research for her PhD in Serbia on the potential trade obstacles to Serbian fruit trade. From 2010-2014 she coordinated the Academic Partnership for Environment and Development Innovations with partner universities in Uganda, South Africa, Namibia, Ethiopia and India and the German-Senegalese Renewable Energy Network (GESEREN) at the Center for International Development and Environmental Research (University of Giessen, Germany). She inter alia promoted capacity building in Higher Education Institutions through designing and teaching the jointly developed postgraduate module in the field of sustainable land use. The design of this module has been developed in close collaboration with experts from the development practice.

She consulted the GIZ Zimbabwe, consults the Mayor of the City of Frankfurt am Main and worked within the Research and Education Center "House of Logistics and Mobility", before she engaged herself within the "Farmer Empowerment" project, which is funded by the German Federal Ministry for Development and Economic Cooperation. In 2016 she began to consult the project from a scientific perspective through her position as Senior Researcher at the Center for Development Research, University of Bonn (Germany).

Her current main research interests are institutional and individual empowerment, analysis of farmer organisations and collective actions, impact assessments, vocational education and training and behavioural development economics.

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