Interreg

EUROPEAN UNION

Danube Transnational Programme

DanuBioValNet

WP3.3: Value Chain Mapping
Regional reports- Serbia

Project co-funded by European Union funds (ERDF, IPA)

ECO CONSTRUCTION 1
BUILDING MATERIALS

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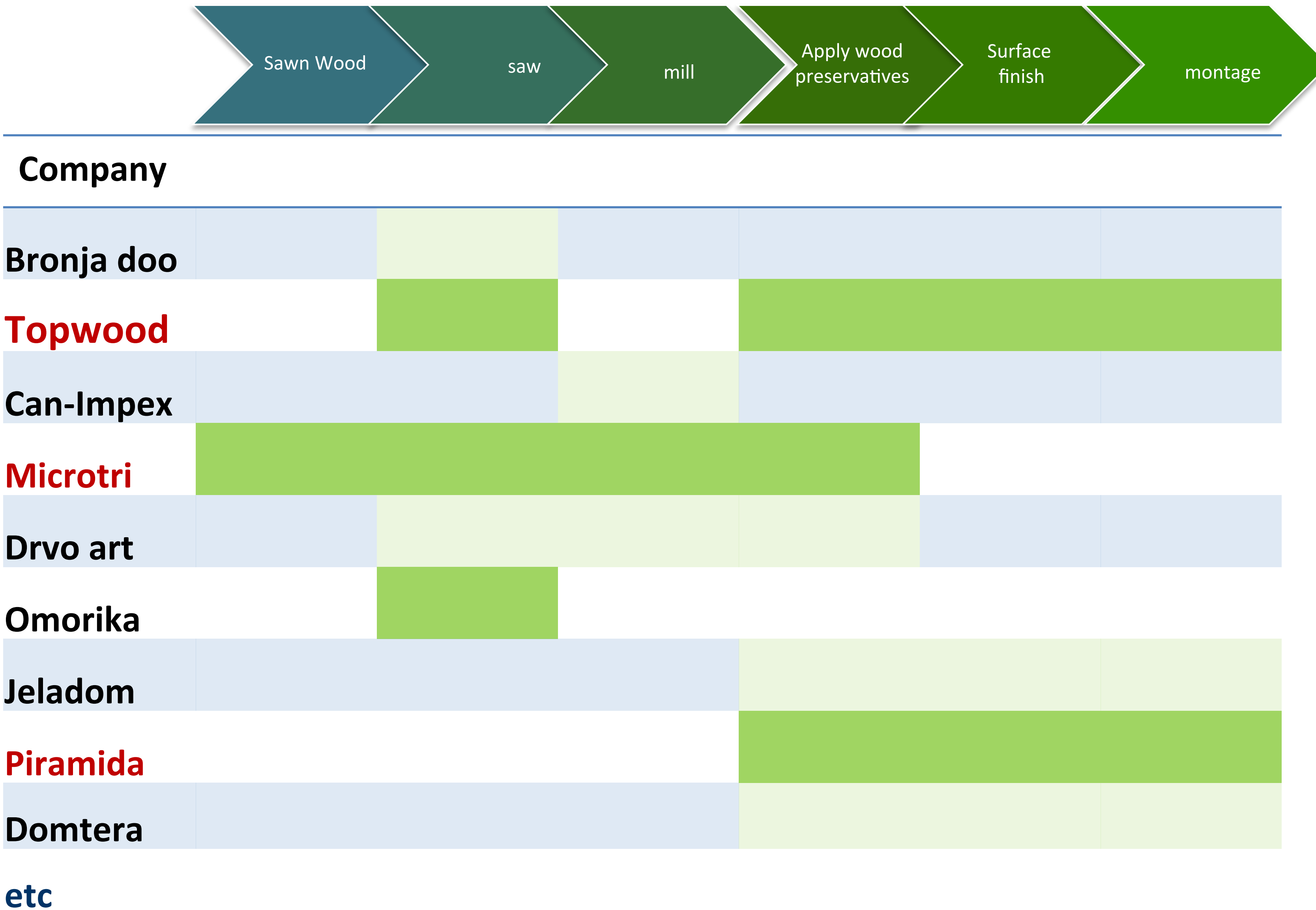
TIMBER CLUSTER



ECO CONSTRUCTION 2
INSULATING MATERIALS

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DUNDJER CLUSTER

Company	Textile Waste	Waste processing	Analysis /testing	Finishing	Isolation Material	Packaging
Pinterod plast						
Euromitex						
Vagres						
CPE						
OPTIMAL IT						
ALFATEC						
HTS HYDROCONSULTING						
EUROSTAND TEAM						

Serbia - **Eco Construction VC**

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General Information

- **Products**: Solid wood panels (beach and coniferous) , Wood flooring, Doors and windows, Laminated wood construction, Wooden roof, Insulation material, Recycled textile waste, Facades;
- **Size of the company**: big (1), medium (1), small (2) and micro company (1);
- **Ownership structure**: corporation (1); family company (4);
- **Annual turnover in 2016**: under 1mil. EUR (2) , 1,1 to 5 mil. EUR (3)
- **Years dealing with the particular products** : 1-5 (1), 5-10 (1), more than 10 years (3)

Total number of the companies interviewed: 5

Serbia - **Eco Construction VC**

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General Information

- **Buyers of the products:** Contracts/projects (5), Wholesale (3), End customer (1)
- **Share of the sales on the markets:** 70% Home 30% Export (3) , Home 90-100% (2);
- **Export countries:** EU (Germany, Austria Belgium, Spain, France, Denmark, Sweden, Slovakia, Czech Republic, Italy), Region (Macedonia, Montenegro). Other countries (Japan, USA, Kazakhstan, Russia)

Total number of the companies interviewed: 5

Serbia - **Eco Construction VC**

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Suppliers of the source material

- **Start material:** logs (2), Timber -Sawn wood (2), textile waste (1);
- **Main source :** State owned forests (4), Private forests (2), Import : Austria, Bosnia(2);
- **Key requirements when purchasing-** in order of importance: 1. Reliability, Certificates, On-time delivery; 2. Quality, Quantity; 3. Price
- **Obstacles to obtain more material:** Availability of the raw material - low level of technology of the state own forests company; small private owners; undeveloped market for the final product
- **Prognoses for the future regarding source material:**

  There will be enough logs for all sawmill capacities: YES (3).NO (2)

  There will be enough source material (other than logs): YES (5)

Total number of the companies interviewed: 5

Serbia - **Eco Construction VC**

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Related industries and support services

Product	Name of the Company
Houses made of logs	SERGEJ; UNA brvnare; JelaDom
Prefabricated houses	DOMTERA; Maker Ivanjica
Insulation materials	VAGRES; PINTER-ODPLAST
Non-toxic paints and wood preservatives	Zvezda Helios; Hempro; Irkom
Low energy light bulbs	Weisslight, Ugrinovci
Certified wooden furniture	Entero, Nova Pazova
Certified wood-flooring	Topwood, Tara, Megapod etc.
Certified wooden doors and windows	Topwood, Iva -best
Certified wooden roof constructions	Piramida Doo

Total number of the companies interviewed: 5

Serbia - **Eco Construction VC**

Quality and Labor Force

- **Quality standards:** FSC from the year 2010 (3 WPcomp.); ISO 9001 from year 2009 or plan to introduce ISO 9001 certificate (2 CONST comp.), other technical standards
- **Quality management:** First measures taken at the company (5) or suppliers have quality measures
- **Qualification structure of the workforce:**

  There is lack of qualified workforce (3 WP comp.);

  There is no lack of qualified workforce (2 CONST comp.),
- **Reasons for the lack of qualified workforce :**

  Low motivation of young people for working in the industry sector (3)

  Mismatch between the curricula and industry needs (3)
- **No educational framework for teaching qualified people, to with eco-construction value chain**

Total number of the companies interviewed: 5

Serbia - **Eco Construction VC**

Competition

- **Who are the competitors:** companies are small and have regional and international competitors
- **The "best in class" in the product area**

  Austria, Germany,
- **The most sophisticated clients**

  Scandinavia, Germany

Total number of the companies interviewed: 5

Serbia - **Eco Construction VC**

Future perspectives

- **Regional and EU policy to push the eco-construction market on European level forward**
  - Some financial incentives or other support measures have to be developed on both levels.
  - We have to boost up the popularity of ECVC in the public
  - Expect of the experts and institutions to push the ECVC on EU level forward.
- **The potential of the national market for eco-construction products in the next 5–10 years.**
  - The people will be somewhat/moderately interested in the eco-construction products

Total number of the companies interviewed: 5

Serbia - **Eco Construction VC**

Future perspectives

- **Regional cooperation areas**

  Buying source material

  Selling end product

  Buying end product

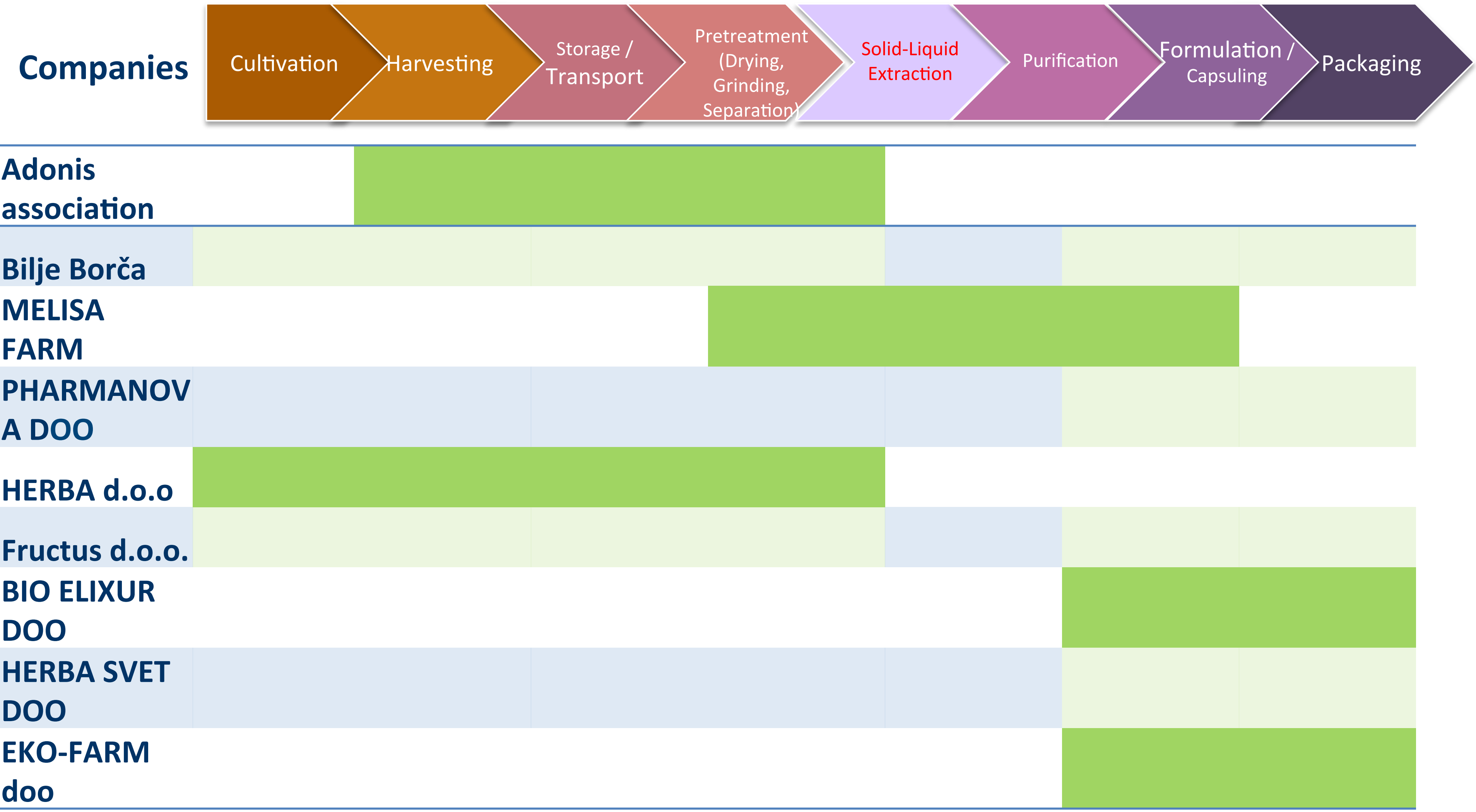
  Cooperation in R&D activities

  Cooperation in the end product sales activities

Total number of the companies interviewed: 5

PHYTO-PHARMACEUTICAL

Cultivated Plants



Serbia - **Phytopharma VC**

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General Information

- **Products**:

  Wild medicinal herbs in order of importance: Marshmallow Root, calendula, nettle leaf, Valerian root, St. John's worth, wormwood ;

  Cultivated medical herbs: in order of importance: Parsley , Mint , Chamomile, Immortelle , Melissa, Thyme, Yarrow, Marshmallow , Mallow, Lavender;

  Herbal extracts (1); Drugs/medicines, dietary supplements (1)

- **Type of the company** : Association of wild herbal collectors/ harvesters(1); Family company - herbal cultivator and small processor (2); Family company in herbal processing (2)

- **Harvested area and location:** 50 ha, Southeast Serbia (1)
- **Cultivated area and location:** 560 ha, South Banat (2)
- **Production standards of wild and cultivated herbs:**

  Conventional (3), Organic (1)

Total number of the companies interviewed: 5

General Information

- **Buyers of the products:** Wholesale, contracts with herbal extract diet supplements producers (3); producing natural cosmetics , diet supplements, drugs pharmaceutical company, health foods (1); producing diet supplements company, retail services: pharmacies, shops (1)
- **Share of the sales on the markets:** 70% home 30% export (1) , export 90-100% (4);
- **Other producers in the region:**
  - Wild medicinal herbs: few associations in South Serbia
  - Cultivated medical herbs: approx 10 in Vojvodina
  - Herbal processing : several medium and small companies

Total number of the companies interviewed: 5

Suppliers of the source material

- **Start material:** seeds (3), semi-product (2)
- **Main source :**

  Seeds: own production or Institutes, some imported from NL, D(3);

  Semi products: domestic - JELIGOR, Geen life, Ivan Lalic, Fructus, Macval, plantation 1000 ha- imported: from BUL, POL , F;
- **Key requirements when purchasing-** in order of importance: 1. Quality, 2. Reliability, 3. Certificates;
- **Relationship with the suppliers**: long term contacts
- **Obstacles to obtain more material:** Hand labor, specific mechanization; administrative procedures for wild harvesting, lack of certification bodies: outdated methods of physical and chemical analysis, the reference values are not updated, required parameters are not in accordance with EU standards
- **Prognoses for the future regarding source material:**

  There will be less wild harvesting and more plantations

Total number of the companies interviewed: 5

Related industries and support services

- **Other industries/ know-how are necessary to develop product-oriented activity :** agriculture; chemical extracting; engineering; distribution;
- **Availability of the relevant R&D centers:**

  Do not use services of existing R&D centers (4); cooperation with the Faculty of Agriculture
- **Role of any supporting associations**

  Activities for the improvement of the regulatory environment
- **Partnerships that are critical for the company's operations :**

  Suppliers, customers, distributors

Total number of the companies interviewed: 5

Serbia - **Phytopharma VC**

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Quality and Labor Force

- **Capacity-building:**

  Procesing companies are not engaged in capacity-building activities of the suppliers; Herbal harvestres and cultivators do not receive technical assistance from its customers - domestic or foreign

  Thre is a need for herbal harvestres and cultivators capacity-building

  Processing companies are willing to deploy staff and/or technology for QM to the plant material producers

- **Quality management:**

  Measures taken at the company

  Independent quality management certification, foreign cerification body

Total number of the companies interviewed: 5

Competition

- **Competitors :**

  National: no (1), several (4); Regional:SLO, RO, BUG, GR
  International: D

- **The “best in class” in the product area :**

  Naturex, Innothera (F), Stada (D), Krka (SLO)

- **The most sophisticated clients, taking the lead in promoting the use of phytopharma products**

  France

Total number of the companies interviewed: 5

Serbia - **Phytopharma VC**

Future perspectives

- **Regional cooperation areas**

  Buying source material (seeds)

  Capacity building of the plant material producers

  Standardization of the active component

  Selling end product

  Buying end product

  Cooperation in R&D activities

  Cooperation in the end product sales activities

Total number of the companies interviewed: 5