Kraljevački Kajmak
(Kajmak of Kraljevo)

Marguerite Paus and Magali Estève
(AGRIIDEA)

FAO & SINER-GI Meeting
31 January – 1 February 2008
**Kajmak**

Dairy product made by the fat layer, created when the milk is boiled and then cooled down.
Geographical limits

Low and hilly lands, large volumes of production (young kajmak)

Mountainous areas, small volumes of production (old kajmak)

Traditional area of kajmak production

Case presentation
Impact on Rural Development
Perspectives and Trends
supply chain and market structures

2006

Milk production

Kajmak production

Around 600 small producers = 10 kg per week

<table>
<thead>
<tr>
<th>100 t</th>
<th>5.5 euros/kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>200 t</td>
<td>3.5 euros/kg</td>
</tr>
</tbody>
</table>

Trade

Stubal

Direct sales or small trade in the region

Green markets, restaurants

Supermarkets, wholesalers

Export = 65 t

5.5 euros/kg

Green markets, specialized shops, restaurants

Paus and Réviron, 2007

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Protection schemes

• Kraljevacki kajmak is not protected, nevertheless there is an initiative led by a local NGO working on the protection of the Kraljevacki kajmak as a protected designation of origin (PDO);
• The Intellectual Property Office is in charge of Geographical Indications issues;
• The scope of application of the provisions on appellations of origin of the Law concerns all goods;
• During the examination of requirements for the registration, the IPO asks for the opinion of the competent authority (Ministry of agriculture);
• There is no opposition procedure before the final registration;
• There is no certification body for PDO / PGI in Serbia.
Stakeholders and motivations

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**Intellectual Property Office**

**Kraljevacki Kajmak system**

- Producers of kajmak (household production)
- Producers of milk
- Producers of kajmak (dairies)
- Municipalities
- Vet Institute
- Vet Station
- Cooperative Stubal (packaging and marketing)
- Facilitator: Information, meetings, communication
- **Regional NGO IDA**
- **AGRIDEA, IED (Switzerland)**
- **Ministry of Agriculture**
- **Producers of kajmak (dairies)**
- **Producers of milk**
- **Kraljevacki Kajmak system**

**Kraljevo region**

- **Sanitary inspection**
- **Green markets**
- **House consumption and restaurants**
- **FAO & SINER-GI meeting / 31 January – 1 February 2008**

**Perspectives and Trends**

**Impact on Rural Development**

**Universities**

**Case presentation**

Serbian markets: Belgrade, Novi Sad, Zlatibor, ...
Foreign markets: Montenegro, Croatia, FRY Macedonia, Bosnia and Herzegovina
Household production

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Dairy production
## Impacts of the GI system on sustainability

### Economic effects

<table>
<thead>
<tr>
<th>Type of kajmak</th>
<th>Serbian industrial „cheese spread“</th>
<th>Kraljevacki kajmak</th>
<th>Other artisan kajmaks (Lijg, Zlatibor)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prices</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price of the milk (producers) Euros/ Kg milk</td>
<td></td>
<td><strong>Household kajmak</strong></td>
<td><strong>Dairy production</strong></td>
</tr>
<tr>
<td>Price of the kajmak (producers) Euros/ Kg kajmak</td>
<td></td>
<td>0.23 - 0.40</td>
<td></td>
</tr>
<tr>
<td>Price of the kajmak (consumers) Euros/ Kg kajmak</td>
<td></td>
<td>2.8 – 5.0</td>
<td></td>
</tr>
<tr>
<td>Main channels</td>
<td></td>
<td>4.1 - 8</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Green markets, restaurants</td>
<td></td>
</tr>
</tbody>
</table>
Impacts of the Protection scheme on sustainability / Economic effects

- Processing / retailing in marginal areas
- Premium to producers
- Value added
- Access to market
- Marginal areas’ development
- Tourism

Present situation vs. Expectations

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Impacts of the Protection scheme on sustainability / Environmental effects

- Pest management (per ha)
- Preservation of domestic species
- Biodiversity of wildlife
- Transport
- Farming of difficult areas
- Awareness of ecological issues

Present situation vs. Expectations

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Impacts of the Protection scheme on sustainability / Social effects

- Social identity
- Healthy food product
- Landscape aesthetic
- Typicity
- New competences
- Farmers' social integration
- Creation of new income
- Consumer trust in food

Case presentation
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Expectations
Present situation

• Gender issue
• Exclusion

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Trends and perspectives: GI system

1- a lot of small kajmak producers will stop production and deliver milk to bigger processors
2- Emergence of middle size dairies
3- Potential conflicts
GI system

Expected 2009
Milk production

- Kajmak production
  - Around 300 small producers
    - 100 t: 5.5 euros/kg
    - 50 t: 3.5 euros/kg
  - R
  - E
  - M
  - T
  - M
  - L

- ZlatiborK
- Kuc

- Export = 65 t

Trade
- Wholesalers
- Supermarkets
- Green markets, specialized shops, restaurants
- Green markets, restaurants
- Direct sales or small trade in the region

Paus and Réviron, 2007
Thank you for your attention!
GI protection schemes
(organization and political strategies)

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GI Institutionnal issues: main trends

- Establishment of a PDO/PGI law
- Controls
- "Branding" trends

In project:
- expertise from CH
- local organizations: testing commissions

Empowerment of GI network

International proactive GI Network

Strategy for accession to EU:
- legal framework
- hygienic requirements

Perspectives and Trends

Case presentation

- Lack of coordination between Intellectual property Office and Ministry of agriculture
- No certification body
- Trainings and "pilot" products (among them Kajmak)
- Confusion between brands, Trade marks and PDO/PGI

Impact on Rural Development

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Kraljevacki kajmak at a glance

- Estimated number of farm-producers: 600
- Estimated volume marketed: 300 t/ year
- High variability in the quality
- Definition of „kajmak“ in a Serbian by-law, uniqueness of the *KRALJEVACKI* kajmak? (typicity of the process from Kraljevo? -> Geographical limits are fuzzy)
- Good reputation, but not linked to a particular premium in comparison to other artisan kajmaks
- Public support