ALBANIAN AGRICULTURE

2011

Fact sheet
Ministry of Agriculture, Food and Consumer Protection
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Dear Readers,

I have the pleasure to inform you that in the recent years the Albanian agriculture has made significant progress in domestic production, export growth, production and processing standards, and the approximation of national legislation with the EU Acquis communautaire.

For the year 2010, economic growth for agriculture was 7.8% while the average growth of the sector in the last five years, has been 4%. For the essential agricultural products like meat, milk, fruits and vegetables, we supply with local production over 90% of our market needs.

Some Albanian products, such as the early vegetables, olive oil, eggs, medicinal plants and processed fish products are successfully emerging in regional and European markets.

In the framework of the implementation of new policies in the agricultural sector, it is recognized that recent years have brought a significant change in the structure of the farm plantings. There is a tendency for orientation of production towards more profitable sectors such as vegetables, fruit and olive trees. Due to the implementation of these new policies to support agriculture, was achievable to plant in the last 5 years, about 5000 ha of olive groves, about 3000 ha fruit trees and 1200 ha vineyard.

Support was provided for farmers with direct funding by the state, to cultivate vegetables in greenhouses, for those who breed livestock and for many others who apply modern technologies in manufacturing. Overall, over fifty thousand farmers have benefited from direct support in the last five years.

The program of support for agriculture will focus increasingly more on those activities that promote typical products of certain regions, on organic products, on the introduction of modern techniques in manufacturing, etc., with the main objective that the Albanian agriculture products become more competitive in domestic and European market.

The foundation of our support for agriculture in the coming years will be on two major national programs: one for olive groves and the other for cultivating fruit trees.

Large investments are made in the field of irrigation, drainage and flood protection by improving irrigation to about fifteen thousand hectares of land.
every year, as well as in full reset of the drainage system in an area of about twenty thousand hectares of agricultural land per year. Due to these investments are finally resolved the problems of flooding from rivers in some areas of the country.

In order to strengthen the control on food safety in the country, new structures for inspection are created and investments are being made across the network of veterinary and food safety laboratories, in order to modernize and help their accreditation.

The Albanian government is planning a substantial increase in the budget for the agricultural sector in the coming years. With the state budget funds as well with the support of foreign donors like the EU, WB, USAID, UNDP, Italian Cooperation, GIZ, SNV etc., a series of new projects are being implemented in the field of agriculture and food security in the country.

The Ministry of Agriculture, Food and Consumer Protection of Albania with the assistance of foreign expertise is working to draft IPARD Programme which is expected to start its implementation in mid 2012. This program will be financed from EU funds and state budget, and provides support for farm production and agro-processing industry for four main sectors: fruits, vegetables, meat and milk.

The implementation of the program is expected to significantly increase productivity and standards of agricultural and livestock production, and will further improve capacity in agro-processing industry.

Despite progress and positive trend in recent years, we are well aware of all the problems inherent in the Albanian agriculture and its sustainable development. Problems such as the development of agricultural land market, cooperation in agriculture, productivity increase, improved marketing chain, increased production and trading standards, and above all improving livelihood in the rural areas, remain some of the key challenges of this sector.

Minister of Agriculture,
Food and Consumer Protection

GENC RULI
I. Albania in Figures

The Republic of Albania is situated in the South East region of Europe, South-West of the Balkan Peninsula, along the Adriatic and the Ionian Seas.

The length of the total boundaries of Albania is 1094 km:

So, the main geographic regions are the coastal lowlands, the intermediate hill country and the mountain ranges, rising to altitudes of around 2 000 meters above sea level. Average altitude is 708 m above the sea level. This altitude is two times higher than European average. The average agricultural land per capita is very small at 0.2 ha, the smallest in Europe.

* Preliminary data of 2009
The administrative division of the country consists of 12 prefectures, 36 districts, 65 municipalities, 72 cities, 308 communes, 2980 villages. The population of Albania is 3.2 million inhabitants.  

The overall population density is relatively high, at 110 per km². The Albanian language comprises its own branch of the Indo-European language family. Albania is a potential candidate for membership in the European Union and received the NATO membership on 1 April 2009.

Main Macroeconomic Indicators
II. Agricultural Overview

Albania belongs to the subtropical Mediterranean climate and is characterized by mild winters with abundant precipitation and hot, dry summers. The annual mean air temperature has a wide variation over the territory.

Absolute minimal temperature recorded -25.8 degrees and the highest 43.9 degrees Celsius. The average annual temperature varies from 17.6 degrees Celsius (Saranda) to about 7 degrees Celsius (Vermoshi).

Albania is known as a country with a very high sunshine period. The mean annual precipitation total over the Albania is about 1,485 mm/year. The highest precipitation total (70%) is recorded during the cold months (October-March).

The land used for agriculture is often quite sloping, with only about 44% of the agricultural land having a slope of less than 5%.

Agriculture provides the income basis for most of the population and serves as an employment safety net. The rural population is estimated to comprise about 50 percent of the total population while about 60 percent of the labor force works in agriculture and related fields.

Approximately 3250 kinds of plants or 29% of the species of the European flora and 47% of the Balkan flora, vegetates in Albania.

Agriculture is one of the most determinative sectors of the Albanian national economy. Its contribution has been decreasing over years and it is estimated at 17% of the GDP. The rural families continue to dominate the national economy, more than 50 percent of the population lives in the rural areas, and agriculture is the main working alternative of people living in these areas. The real mean growth rate of agriculture production during the last five years is estimated to about 4 percent per year.

The agricultural sector suffers from the small size of farms and the fragmentation of farm land, which is a barrier to production and marketing.

Higher competitiveness, as a result of lower costs and higher quality, food safety and standards, will strengthen the position of farmers in the market, will raise their income and will introduce safer products in the market for farmers.

This is the result of the specific problems that this sector is facing, among which the most evident are the migration from rural areas, land ownership and very limited size of farms, the marketing of products, the irrigation and the drainage system, the low level of technologies in use, the weak organization of farmers, the low development level of agro-processing, etc.
Realization of agriculture production in 2010 as compared to 2009 was at 108%, leaded by orcharding by 119%, crop production by 113% and livestock by 102%.

Value of agricultural products in %

- Crops: 17%
- Livestock: 52%
- Orcharding: 31%

Value of production by branches (Mln ALL)

- Agriculture
- Agro-Industry
III. Agriculture and Food Sector Strategy (AFSS)

The Agriculture and Food Sector Strategy is prepared in the framework of the Integrated Planning System as a coherent reflection sector and crosscutting strategies.

The agricultural policy of the government has the following strategic priorities:

- Increase financial support to farms, agricultural and agro-industrial businesses with special emphasis on fruit trees, vineyards, vegetables and animal farming, as well as on the industrial processing of fruit, grapes, vegetables, milk and meat, on the basis of the advantages on the different areas of the country.
- Improve the management, irrigation and drainage of land.
- Improve the marketing of agricultural and agro-processing products to increase the competitiveness of domestic agriculture.
- Improve the level and quality of technologies, information and knowledge applied by farmers and agro-processing businesses through support to Agricultural Information Centers and Agricultural Technology Transfer Centers.
- Increase the quality and safety of agricultural and agro-processing products.

The strategic sectors over the period 2007-2013 are:

- Fruit, olive and grape production
- Vegetable production
- Livestock production
- Industrial processing of fruit and vegetables
- Industrial processing of grapes
- Industrial processing of milk and meat

In the framework of the preparation for IPARD and IPARD-like implementation, the current strategies will soon be reviewed and updated.
The strategic choices of the IPARD Programme for Albania take into consideration the Rural Development Strategy and the IPARD regulation, to allocate all resources to the objectives of the Priority Axis 1 of the IPA Component 5, aiming at improving market efficiency and implementation of Community standards in the fields of environmental protection, food safety and quality, animal and plant health, animal welfare and occupational safety (Community standards) in the agricultural sector and the food industry.

The objectives of the IPARD Programme:

- To contribute to the preparation of the Albanian agricultural sector and food industry for its accession to the European Union by alignment to Community standards
- To contribute to increasing competitiveness of the Albanian agricultural sector and food industry by support for restructuring and modernization

The IPARD programme in Albania aims at improving the agri-food chain in four priority sectors: milk, meat, fruit and vegetables.

**IPARD like** is a support from European Commission through IPA 2011 to be implemented by the German Agency for Technical Cooperation (GIZ) through indirect centralized management. The project will be focused to 4 results:

- Increase the capacity of and economic benefits to farmers and agro-businesses
- Capacity of advisory and consultancy services to deliver adequate information and advice on agriculture and rural development enhanced
- Grant schemes implemented in line with IPARD-like procedures
- Consolidation and preparedness of Operating Structure to manage IPARD programme.
National Food Authority (NFA)

National Food Authority (NFA) is set up as a public institution under the responsibility of Ministry of Agriculture, Food and Consumer Protection and operates in accordance with Article 62 of the Law no. No 9863 of 28.01.2008 “On food” and of the Council Ministers Decision No. 1081, date 21/10/2009 “On Organization and Functioning of NFA”. The main target of NFA is the controls and inspections, risk assessment and communication, for the whole area of food safety, animal health and plant protection in Albania.

**NFA main functions and responsibilities at central level:**

- Plans and coordinates official control of food and feedstuff, plant protection and animal health;
- Provides unification of the food safety inspection/control practices at country level;
- Provides analysis through accredited laboratories and coordinates the activities of authorized laboratories for the official control system;
- Leads the process of risk assessment on food and feedstuff;
- Performs the necessary scientific studies related to risk assessment on food safety and health of plants and animals;
- Informs the general public about food safety issues;
- Supports from technical, administrative and research point of view the activity of the scientific committees and panels.

Direct payment schemes

The direct payment schemes were firstly introduced by the Ministry of Agriculture, Food and Consumer Protection in 2007. They consist in the introduction of new technologies, support of BIO products, bee hives, support for greenhouses, production of extra virgin olive oil, and also for citrus fruits and strawberries, walnuts, hazelnuts and pomegranates, as well as through interest rate subsidies to loans for agricultural mechanics, processing and storage line for agriculture and livestock products.

In 2009, the Agriculture and Rural Development Agency started functioning, based on the Law No. 9817, date 22.10.2007 “On Agriculture and Rural Development” and the Decision of the Council of Ministers No. 1443, date 31.10.2008 “On establishing, organizing and functioning of the Agriculture and Rural Development Agency (ARDA), as Paying Agency”.

During these years and up to date, more than 25,000 eligible applicants fulfilling the defined criteria, received (in total) a financial support of 4 milliard ALL.

According to the Decision of Council of Ministers No. 27, date 12.01.2011 “On defining the basic criteria of the supported sectors and extent of benefit from the fund of agriculture and rural development program” and the Guideline No. 2/1, date 08.02.2011 “On implementation of the Decision of Council of Ministers No. 27, date 12.01.2011”, for 2011 the number of the supported measures is 17. For the first time it was introduced and given importance to the new plantings for walnuts, hazelnuts and pomegranates as a national asset for our country. An innovation of the abovementioned Guideline is the treatment of 5 supporting schemes (planting of walnuts, hazelnuts and pomegranates; planting of apples, pears, plums, cherries, peaches and quinces; planting of grapes; the collection of chestnuts and cattle breeding) with mitigation criteria for mountain and less advanced areas that enables the farmers of these areas to also benefit from these schemes.
Agricultural Technology Transfer Centers

Applied agricultural research is done by the Agricultural Technology Transfer Centres (ATTC) in Fushe Kruja, Korca, Vlora, Lushnja and Shkodra. ATTC-s are focused on:

Research (on station and on farm)

- Identify, test and adopt new methods and materials (inputs) in agricultural practices.
- Based on the findings, define technology packets for farmers.

Outreach activities

- Demonstration of new cultivation technologies of agricultural crops and animal breeding.
- Training of agricultural specialists, farmers, students of agricultural sciences and others
- Provision of technical expertise for Extension Service structures and farmers.
- Publication of elaborated quality materials for agricultural specialists and farmers.

Agro Economic research

- Farm’s integrated management
- Support policy makers at MACP with needed information on fields of agriculture, food, consumer protection & rural development.

Seed production

- Provision of high certificated generation materials for some kinds of seeds and seedlings

ATTC are specialised:

ATTC- Fushë-Krujë (Forage cultivation, legume (white beans), bovine, swine (pigs), poultry and integrated management of farm; services for soil and water;

ATTC-Lushnjë (Vegetables in greenhouses and open field; wheat;)

ATTC Vlorë (Nuclei fruit trees, olive trees, vineyards, citrus;)

ATTC Korçë (Small ruminants, Seedy fruit trees (apples), potatoes, barley;)

ATTC Shkodër (Maize (and recently also Medical and Aromatic Plants). Next to these national specialization each ATTC is supposed to cover the needs and other priorities of farmers in the region.)
The total agricultural land represents only 24 % (about 695,520 ha) of the total area of the country.

About 44 percent (about 304,000 ha) of the total agriculture land is in the lowland area, with relatively high productivity potential.

From a total of 696 thousand ha agricultural land in Albania, about:
- 562 thousand ha have been privatized, and still
- 134 thousand ha, or about 20% of total agricultural land, are in state ownership

The land use policies are developed based in this above reality.

The land market in Albania is still in first steps and a package of integrated measures is needed for its development and consolidation.
Irrigation

The existing infrastructure of irrigation, drainage and flood protection has been designed for insuring irrigation to around 360,000 ha, ensuring drainage to 280,000 ha, and reduction of the risk against a river and sea flooding to a potentially endangered surface of 130,000 ha.

Ongoing investments are being made in the rehabilitation of irrigation and drainage infrastructure, which constitutes a large percentage of public expenditures in agriculture.

Actually, the total area with rehabilitated irrigation infrastructure is 200,000 ha while the total area with rehabilitated drainage infrastructure is 220,000 ha. Rehabilitated dams for irrigation are 80, out of a total 626 dams.

MAFCP has currently transferred the ownership to local government units 315 reservoirs all together with the respective irrigation schemes.

Actually, are established and operate 3 pilot Water Use Organizations, that have irrigation infrastructure in the use for about 12,000 ha, while a considerable number are in process of establishing in all zones of the country.
**V. Farm Structure**

The Albanian agriculture is dominated from small size farms. The total number of farms is approximately 350,654 farms. The average size of household farms is 1.2 ha. This area is distributed across an average of 4.5 parcels, with average parcel size 0.26 ha.

**Agricultural Households**

- 38%: 0.1-0.5 Ha
- 26%: 0.6-1.0 Ha
- 23%: 1.1-2.0 Ha
- 13%: 2.1+ Ha

The small farm size and the fragmentation are an important handicap to the improvement of agriculture productivity and to a sustainable development of the agriculture sector.
The agricultural household consist of about 4.7 persons. The rural population is still dominated by young people. About 17% is less than 15 years old, 72% is between 15 and 65 years old and only 11% is older than 65 years. About one third of population lives in the mountainous area.

The agricultural farming is the main source of employment.

The population employed in private agricultural sector is about 55% of the total employed population.
VII. Crop production

Agricultural production has increased significantly in recent years. Field crops occupy about 31% of total agricultural production. Cereals, vegetables, potatoes and white beans, continue to be the dominant crops.

As a result of supporting schemes applied, orchard production has been continuously increasing in recent years. It occupies about 17% of total agricultural production, with grape and fruit trees as dominant cultures, and a continuous increase in olives production.

Field crops structure

The area under greenhouses has notably increased, the actual planted area with vegetables is 856 Ha. The dominant products are tomatoes, cucumber, peppers etc.
VIII. Livestock production

Livestock is a strategic sector. It occupies about 52% of all production of the sector. Albania has optimal conditions for sheep and goat breeding in hilly and mountainous areas and cows in some flat areas.

Albania has a high self-sufficiency rate of livestock production, especially for beef, sheep and goat meat, eggs and milk products.

As a result of policies to support farm-to-market orientation, the number of specialized livestock farms with products destined for market, is gradually increased.

The structure of livestock production (in %)

![Pie chart showing the percentage distribution of livestock products.]

The structure of livestock in cattle unit

![Pie chart showing the percentage distribution of livestock in cattle unit.]

- Milk: 46.8%
- Eggs: 40.7%
- Eggs: 9.8%
- Meat (live weight): 2.4%
- Milk: 0.3%

- Cattle: 48%
- Sheep & Goats: 27%
- Pigs: 10%
- Poultry: 9%
- Equidae: 6%
IX. Agro processing industry

Agro processing industry occupies about 24.4% of total estimated production (prices of 2006) from agriculture and agro-industry. The dominant activities are those of dairy, meat, bread and flour processing.

The situation in the sector varies. The enterprises especially in dairy and meat processing have made large investments to assure compliance with standards.

<table>
<thead>
<tr>
<th>Description</th>
<th>2000</th>
<th>2005</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of enterprises</td>
<td>1844</td>
<td>2060</td>
<td>2117</td>
<td>2081</td>
<td>2156</td>
</tr>
<tr>
<td>Number of employees</td>
<td>9076</td>
<td>9865</td>
<td>10919</td>
<td>10262</td>
<td>10804</td>
</tr>
<tr>
<td>Value of products (prices of 2006)</td>
<td>27990</td>
<td>42790</td>
<td>51353</td>
<td>52731</td>
<td>55543</td>
</tr>
</tbody>
</table>

Organic Agriculture

The organic movement in Albania is also endowed with new actors and activities.

Today in Albania various methods of agricultural production are practiced:

- Low-input farming
- Conventional farming
- Integrated production
- Organic Farming
- Typical local production

According to National Agriculture and Food Strategy for the period 2007-2013, the surface of agricultural land managed organically will reach the level of 5% in the year 2013.
X. Foreign trade

In Albania imports dominate over exports. Anyway, recently the agricultural exports are increasing, softening so the trade deficit. The main exported products are vegetables, medicinal plants, eggs, mineral water, fruit juices etc.

Export-Imports (in 000 Euro)

<table>
<thead>
<tr>
<th>Description</th>
<th>EXPORTS</th>
<th>IMPORTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2008</td>
<td>2009</td>
</tr>
<tr>
<td>Crops</td>
<td>24806</td>
<td>19851</td>
</tr>
<tr>
<td>Livestocks</td>
<td>8592</td>
<td>7296</td>
</tr>
<tr>
<td>Agroindustry</td>
<td>27057</td>
<td>29752</td>
</tr>
<tr>
<td>Total</td>
<td>60456</td>
<td>56899</td>
</tr>
</tbody>
</table>

Agricultural Exports by Country

- Italy: 27%
- Greece: 6%
- Germany: 10%
- Kosovo: 9%
- USA: 5%
- Others: 43%
The most exported products

- Canned fish: 30%
- Medicinal Plants: 28%
- Vegetables: 11%
- Animal Innards: 7%
- Raw leather: 4%
- Others: 20%

Agricultural Imports by Country

- Italy: 49%
- Greece: 17%
- Brazil: 15%
- Russia: 5%
- Germany: 5%
- Turkey: 5%
- Others: 4%

The most imported products

- Wheat, rye: 56%
- Fruits: 9%
- Poultry meat: 6%
- Vegetable oil: 4%
- Sugar: 4%
- Mineral Water: 5%
- Cigarettes: 5%
- Others: 11%
## Foreign Projects

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Donators</th>
<th>Value mln</th>
<th>Complet. date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving the Consumer Protection Against Zoonotic Diseases</td>
<td>EC(IPA) 2008</td>
<td>7,5 €</td>
<td>2013</td>
</tr>
<tr>
<td>Consolidation of Food Safety System in Albania</td>
<td>EC(IPA) 2009</td>
<td>3,5 €</td>
<td>2012</td>
</tr>
<tr>
<td>Construction and rehabilitation of National Food Authority Regional offices and Laboratories</td>
<td>EC(IPA) 2010</td>
<td>4,7 €</td>
<td>2015</td>
</tr>
<tr>
<td>Strengthening Food Control Institutions in Albania</td>
<td>Government of Italy</td>
<td>2 €</td>
<td>2012</td>
</tr>
<tr>
<td>Promali Value chains for Sustainable Lively Hoods in Mountains of Albania</td>
<td>SNV/Danish Government Promali</td>
<td>5 €</td>
<td>2013</td>
</tr>
<tr>
<td>Mountain towards market (MADA)</td>
<td>IFAD</td>
<td>11 $</td>
<td>2012</td>
</tr>
<tr>
<td>Improving Competitiveness of Albanian Farmers</td>
<td>USAID</td>
<td>10 $</td>
<td>2012</td>
</tr>
<tr>
<td>Sustainable Agriculture Support in Albania (SASA) (PHASE V)</td>
<td>Switzerland (SASA)</td>
<td>1.42 €</td>
<td>12/2011</td>
</tr>
<tr>
<td>Support to the preparation of a National Land Consolidation Strategy and a Land Consolidation Pilot Project in Albania</td>
<td>FAO</td>
<td>0.39 €</td>
<td>2012</td>
</tr>
<tr>
<td>Support The improvement of Livestock Sector in Albania</td>
<td>EC and Italian government</td>
<td>1,4 €</td>
<td>2012</td>
</tr>
<tr>
<td>Inter-sectorial Rural Development Project North Albania</td>
<td>Italian government</td>
<td>2,4 €</td>
<td>2012</td>
</tr>
<tr>
<td>Advance Agreement for preparation of proposed Water Resources and irrigation Project</td>
<td>EBRD</td>
<td>1 mln $</td>
<td>2011</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Donators</th>
<th>Sum mln</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support to Agriculture and rural Development</td>
<td>EC (IPA 2011)</td>
<td>20,7€</td>
</tr>
</tbody>
</table>
Membership in International Organizations

**FAO**  
Food and Agriculture Organization

**OIE**  
International Office of Epizootics

**CIHEAM**  
International Center for Advanced Mediterranean Agronomic Studies

**FEZ**  
European Federation of Animal Production

**IFAD**  
International Fund of Agricultural Development

**EPPO**  
European Plant Protection Organization

**European Commission of Food and Mouth Disease**

**ISTA**  
International Seed Testing Association

**IPGRI**  
International Plant Genetic Resources

**OECD**  
Scheme for Varietal Certification (Cereal, Maize and Sorghum seeds)

**UPOV**  
International Convention for the Protection of New Varieties of Plants

**ICAR**  
International Committee for Animal Recording

**ICO**  
International Council of Olive Oil
IMPORTANT CONTACTS

- **MAFCP:** Ministry of Agriculture, Food and Consumer Protection  
  Sheshi “Skenderbej” Nr 2, Tirana ALBANIA  
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  Street: Muhamet Gjollesha, 56  
  Tel/fax: +355 (4) 2252658  
  Email: info@aku.gov.al  
  Website: http://www.aku.gov.al

- **Agriculture and Rural Development Agency (Paying Agency):**  
  Sheshi “Skenderbej” Nr 2, Tirana ALBANIA  
  Tel/fax: +355 (4) 2228318  
  Website: http://www.azhbr.gov.al

- **Agricultural Transfer Technology Centers (ATTC):**  
  MAFCP (The contact point: Department of Extension Service, Research & Agricultural Information)  
  Tel/fax 00355 42 2232 69

- **National Seed Entity:**  
  National Seed and Seedling Institut  
  Address: “Siri Kodra” street, Tirana, Albania  
  Tel/Fax: +355 4 230324

- **National Tabacco Agency:**  
  National Agency of Tobacco and Cigarettes  
  Address: “Siri Kodra” street, Tirana, Albania  
  Tel/Fax: +355 42 256 911  
  Email: akdc@icc-al.org

- **Albanian Agrobussines Council:**  
  Address: Rr. Mine Peza, Pall.87/3, Tiranë - ALBANIA. Tel / Fax : +355 4 229 445  
  Web: http://www.kash.org.al

- **Agricultural University of Tirana:**  
  Address: ’Koder Kamez’ Tirana Albania  
  Tel/fax 00355 47 200 874  
  e-mail: iroaut@yahoo.com  
  web: http://www.ubt.edu.al