Market potential for non-timber forest products in the Republic of Macedonia

Master thesis

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MASTER THESIS: Market potential for non–timber products in the Republic of Macedonia
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Abstract

Market value and demand for NTFPs has grown considerably in the past ten to fifteen years while declining revenues from timber in some areas have encouraged foresters to consider the values of NTFPs. It is believed that the concept of sustainability, which is widely accepted in recent decades, should take into account the total value of forests and to ensure management of these resources in a manner that will provide numerous economic, environmental and social uses. Sustainable forest management includes also socio-economic functions through contributions of forest resources to the overall economy, processing and marketing of forest products, trade and investments in the forestry.

This master thesis describes the current situation regarding the regulative framework relevant for NTFPs and describes which NTFPs were present on the market in Macedonia, the importance of the products and also the organization and cooperation between the actors in the NTFPs sector (collectors, producers and traders). Also this thesis explored which factors are influencing and are important for the market of NTFPs.

The methodology used in this research was quantitative and qualitative. First of all, NTFPs were divided in three groups: Mushrooms, Aromatic and medicinal plants; and Berries and other fruits. Collection of primary data for investigated research on market of NTFPs and actors involved in dealing with NTFPs was by survey with two different semi-structured questionnaires, one for companies active in the field of NTFPs (buyers, processors and traders) and one for pickers (collectors) in the field. Furthermore, content analyses method was used for analyzed policy documents relevant for NTFPs according to the key word: “non wood forest products” or “other products”.

Theoretical framework used for this master thesis was marketing theory with focus on marketing mix tool: product, price, place and promotion (4Ps) + public support and political power (2Ps).

Results showed that in the Republic of Macedonia there are two levels of companies which exist on the market of NTFPs, companies which exports and companies which act as middlemen. Also it can be concluded that there was need for greater amounts of collected NTFPs, because the capacity of companies were utilized only 50%. So, there is greater demand versus supply of NTFPs.

According to the obtained results, interest of collectors of NTFPs register trends of decline due to the low price of NTFPs, too much time spent on collection, forest fires, etc. On the other hand, NTFPs represent important income for their family budget according to the difficult economic situation in the state.

Key words: NTFPs, market, trade, companies, collectors
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## Abbreviations and acronyms

<table>
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<th>Abbreviation</th>
<th>Description</th>
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<tr>
<td>FOPER</td>
<td>Forest Policy and Economics Education and Research</td>
</tr>
<tr>
<td>MAFWE</td>
<td>Ministry for Agriculture, Forestry and Water Economy</td>
</tr>
<tr>
<td>MoEPP</td>
<td>Ministry of Environment and Physical Planning</td>
</tr>
<tr>
<td>NTFPs</td>
<td>Non Timber Forest Products</td>
</tr>
<tr>
<td>PE MF</td>
<td>Public Enterprise Macedonian Forests</td>
</tr>
<tr>
<td>SEE</td>
<td>South Eastern Europe</td>
</tr>
<tr>
<td>FAO</td>
<td>Food and Agriculture Organization</td>
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<td>EU</td>
<td>European Union</td>
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1. Introduction

1.1. Definitions

The past decade has witnessed a rapid growth of interest in non-timber forest products (NTFPs) among conservation and development organizations (Arnold and Ruiz Pérez 1998; Wollenberg and Ingles 1998; Neumann and Hirsch 2000; Marshall et al. 2003). There are a number of reasons for the general spread and increasing in global interest in NTFPs. It is believed that the promotion of sustainable use of NTFPs could lead to a win-win situation for poverty reduction and bio-diversity conservation (FAO 1995; Shiva and Verma 2002; Golamet et al. 2008). This is due to the increasing recognition that NTFPs can contribute significantly to the livelihoods of forest dependent communities (Clendon 2001; Belcher et al. 2005; Marshall et al. 2005; Ros-Tonen and Wiersum 2005; FAO 2006; Ahenkan and Boon 2010); household food security and nutrition (FAO1995; Falconer 1997; Clark and Sunderland2004; Shackleton and Shackleton 2004; Ahenkanand Boon 2008); generate additional employment and income (Peters 1996; Ros-tonen 1999; Andel 2000; Marshall et al. 2003); and offer opportunities for NTFP based enterprises (Shackleton and Shackleton 2004; Subedi 2006). Moreover, NTFPs are more accessible to the poor (Saxena 2003); contribute to foreign exchange earnings (Andel 2000; Shiva and Verma 2002); and support biodiversity and other conservation objectives (FAO 1995; Arnold and Ruiz Pérez 1998; Marshall et al. 2005; Charlie and Sheona 2004). Furthermore, NTFPs can be harvested with relatively little impact on the forest environment (Myers 1988; Neumann and Hirsch 2000; FAO 2008). The overall global notion of NTFPs has increased awareness of the multiple products and services provided by forests, and new commitments to address rural poverty. Since then, the importance of NTFPs has moved to the centre stage of the global development agenda. As a result of this, NTFPs are becoming more popular in present times and have in many countries a larger role among marketed forest products. In the area of Southeast Europe, the NTFPs have the potential to significantly contribute to the development of national and local economies. In addition, some of the countries of Southeast Europe (Albania, Bosnia and Herzegovina, Montenegro, Croatia, Macedonia and Serbia) are “very important area for the collection of NTFPs in Europe and play an important role in local, regional and international trade” (2010). One of these countries certainly is Macedonia where slowly begins to accept the trend of the importance of NTFPs, because forests in Republic of Macedonia are characterized in very rich biodiversity with significant non – timber forest resources.

1Albert Ahenkan and Emmanuel Boon, Non-Timber Forest Products (NTFPs):Clearing the Confusion in Semantics, 2011
In recent years has increased the number of papers and publications that treat the area of NTFPs in SEE countries. However, these works are mainly dealing with using NTFPs (2003 / a, 2008 / a, 2008 / c, FAO & Traffic, 2010, Hadzic, Ballian, 2008, Milanovic et al., 2008; Vuletic et al., 2009; Vuletic et al., 2011), calculation of their values (2007, O’Brien Mee 2009) and trade of NTFPs (Kathe, 2003), while the legal framework and responsibilities of institutions, are still poorly explored.

Non-timber forest products (NTFPs), also called special forest products (Thomas and Schumann 1993), non-wood forest products (Food and Agriculture Organization 1997), or minor forest products (Malhotra and Poffenberger 1989), are economically and environmentally important worldwide. They include all non-timber biological materials extracted from forests for human use (Fox 1994). Examples of NTFPs are fruits and berries, nuts, spices, medicinal extracts, oils, gums, resins, insect and animal products, charcoal, cones, seeds, smokewood and flavorwood, greenery and other floral products, honey, mushrooms, specialty wood products, syrup, weaving and dying materials, aromatics, and recreation (Thomas and Schumann 1993).

The term Non Timber Forest Products (NTFPs) is one of the terms used when talking about the broad scope of functions, besides timber production that forests fulfil. Currently there is no existing standard definition for non timber forest products. A simplistic definition that was found for NTFPs includes all forest products other than timber, fuel wood and fodder. On that basis, FAO in a 1995 document prepared by Chandrasekhar proposed the following definition:

“Non-timber forest products included all goods of biological origin, as well as services, derived from forest or any land under similar use, and exclude wood in all its form”.

In 1995, FAO made a first step towards a harmonized definition of NWFPs by organizing the International Expert Consultation on Non-Wood Forest Products in Yogyakarta, Indonesia: "NWFPs consist of goods of biological origin other than wood, as well as services, derived from forests and allied land uses”.

This definition was revised in 1999 (FAO), based on a series of regional and global consultations: “Non-timber forest products consist of goods of biological origin other than wood, derived from forest, other wooded land and trees outside forests”.

According to Ros-Tonen et al. (1995), NTFPs are defined as “all tangible animal and plant products from the forest, other than industrial wood”. But in 1998, they slightly modified this definition to include “all tangible animal and plant forest products other than industrial wood, coming from natural forests, including managed secondary forests and enriched forests” (Ros-Tonen et al. 1998) because in practice, the distinction between ‘wild’ and semi cultivated products is often difficult to make (Ros-Tonen et al. 1998; Belcher 2003).

The other definition which defines NTFPs is given by Mathur and Shiva (1996): “All products obtained from plants of forest origin and host plant species yielding products in association with insects and animals or their parts and items of mineral origin except timber, may be defined as Minor Forest Products (MFP) or Non-Wood Forest Products (NWFP) or Non-Timber Forest Products (NTFP”). After that in 1998 M. P. Shiva defines NTFPs again as: “All usufructs/utility products of plant, animal and mineral origins except timber obtainable from forests or afforested domesticated land areas are termed as Non-Timber..."
Forest Products (NTFP) or Non-Wood Forest Products (NWFP)/Minor Forest Products (MFP)”.

Another definition which will be in the focus of this research, is given by Wong (2000) “...all products derived from biological resources found on forest land but not including timber, fuelwood, or medicinal plants harvested as whole plants”.

The ancient practice of extracting NTFPs, leaving forests structurally and functionally intact, is a possible means to reconcile economic and environmental concerns of the forest (Nepstad and Schwartzman 1992). In fact, increasing sales of NTFPs can enhance the value of the forest, encourage conservation, and improve forest people’s well-being (Padoch 1992). Non-timber forest products (NTFPs) have economic and social values which surpass even timber products in some areas (Padoch 1992 and Peters, Gentry, and Mendelsohn 1989). NTFPs provide important products for local, national and international markets, which are growing rapidly and steadily (Wilkinson & Elivitch, 2000). In addition, market value and demand for NTFPs has grown considerably in the past ten to fifteen years while declining revenues from timber in some areas has lead foresters to consider the values of a wide variety of commodities other than timber (Savage 1995). It has been said of some forest regions, “the sustainable exploitation of non-wood forest resources is the most immediate and profitable method for integrating the use and conservation of forests” (Browder 1992:33 and Peters, Gentry, and Mendelsohn 1989).

To determine the real situation of NTFPs and their economic value for the whole society have to define the market and to make an analysis of market of NTFPs. For that purpose, first of all have to define and determine the market, which is first step in analyzing it: “A market consists of all the potential customers sharing a particular need or want who might be willing and able to engage in exchange to satisfy that need or want”.3

Also, “Market is place where there is competition and sells and buy goods and services that are on the market”. In other words, a market is the collection of buyers and sellers that, through their actual or potential interactions, determine the price of a product or set of products4. Since the market consists of consumers whose needs are different, have to make and define marketing strategy to better understand these needs within the market itself.

One of the most popular definitions of marketing is given by Philip Kotler (1994), where marketing is defined as: “Marketing is a social and managerial process by which individuals and groups obtain what they need and want through creating, offering, and exchanging products of value with others”.5

“Marketing (Management) is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational goals”.6

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In marketing, the term *market* refers to the group of consumers or organizations that is interested in the product, has the resources to buying the product, and is permitted by law and other regulations to acquire the product. Still, should also to know which products are in demand in the market, or how many people will be willing and able to buy that product. Further, market definition has to perfectly understand market size, scope and opportunity. As Guy Smith, Silicon Strategies Marketing say "To know your marketing strategy, you must define your market. Otherwise you are navigating without a map".7

According to Baker (2010) what matters is the state of mind of the producer/seller - their philosophy of business. If this philosophy includes a concern for customers' needs and wants, an appreciation of the benefits and satisfactions which are looked for, a genuine effort to establish dialogue and build a long term relationship then this is a marketing philosophy irrespective of whether or not the organisation possesses any personnel or function designated as 'marketing'.

### 1.2. Problem Statement

NTFPs have economic and social values that surpass even timber products in some areas (Padoch 1992 and Peters, Gentry, and Mendelsohn 1989). In addition, market value and demand for NTFPs has grown considerably in the past ten to fifteen years while declining revenues from timber in some areas have encouraged foresters to consider the values of NTFPs (Savage 1995). It has been said of some forest regions that the sustainable exploitation of NTFPs is the most immediate and profitable method for integrating the use and conservation of forests (Browder 1992:33 and Peters, Gentry, and Mendelsohn 1989). According to 2b principles from report of the United Nations Conference on environment and development (Rio de Janeiro, 3-14 June 1992) “forest resources and forest lands should be sustainably managed to meet the social, economic, ecological, cultural and spiritual needs of present and future generations. These needs are for forest products and services, such as wood and wood products, water, food, fodder, medicine, fuel, shelter, employment, recreation, habitats for wildlife, landscape diversity, carbon sinks and reservoirs, and for other forest products. Appropriate measures should be taken to protect forests against harmful effects of pollution, including air-borne pollution, fires, pests and diseases, in order to maintain their full multiple value”. Besides Agenda 21, in this field important are Helsinki (H1 and H2) the Lisbon Resolution (L1 and L2), which stated that "the promotion of use of NTFPs and services, an integral part of socio-economic aspects of sustainable forest management” (Glück, 2000). It is believed that the concept of sustainability, which is widely accepted in recent decades, should take into account the total value of forests and to ensure management of these resources in a manner that will provide numerous economic, environmental and social uses it. This means that forest policy is "to highlight the importance of the total value of forests and to provide a framework that will enable sustainable development of forestry sector” (Buttoud, 2000).

7http://www.siliconstrat.com/technology_marketing/market_definition_l2_b_2b.html (23.11.2011, 03:16 PM)
Sustainable forest management includes also socio-economic functions through contributions of forest resources to the overall economy, processing and marketing of forest products, trade and investment in the forestry. Therefore, if we want to be part of EU we need to implement their demands for the modern way of sustainable management with forest and forest products which requires us to get acquainted directly and to demand market for NTFPs. Most countries do not have scientific data about NTFPs or their markets (Von Hagen et al. 1996). NTFPs marketing have been largely ignored in research and management partly due to their inherent geographic fragmentation and lower dollar returns per unit of labor time than timber products (Mater 1993).

Within the management of forest as a consequence of the previous system and as is mentioned above non–timber forest products are considered as secondary and insignificant, unproductive forest products. Most of the revenue in forestry in the Republic of Macedonia (around 90 %) comes from the wood as the main product of the forest, large part comes from fuelwood and technical wood contributes with a small part. NTFPs are only mentioned in management plans for forests, but no one knows their part, because never has done an inventory of them. Despite the growing interest for NTFPs, social, economic and environmental consequences of using these products in most developed countries are still completely unknown, primarily because of the significant lack of data on the quantity and quality of products collected and placed (Cai et al. 2011; Turtiainen, Nuutinen, 2012). Several countries have protocols to inventory and value NTFP stocks, such as Sweden, Finland, Lithuania, Latvia, Estonia, Russia, and Poland (Von Hagen et al. 1996). In addition, regional reports from both the United Nations Food and Agriculture Organization and the European Union provide comparative information for some countries (Von Hagen et al. 1996). However, more information on NTFP marketing and development of government and non government institutional capacity for marketing NTFPs will be required before NTFPs can become optimally profitable and balanced within the limits of forest production system (Everett 1996). The problem of lack of data is particularly evident if we take into account to calculate the total economic value of products and services may affect the choice of forest policy objectives, but also on improving the effectiveness of policy instruments, relating to the management and protection of forests. As can be expected in the future requires a change in society compared to the forest, decision makers must be prepared to adapt the instruments of forest policy to the new situation (Buttoud, 2000, Cubbage et al., 2007).

The economic contribution of timber products, specifically in temperate forests and developed world, is fairly well understood, quantified, and recorded. Hence, normally, policy makers often assume that forests are of no economic value unless they are harvested. However, non-timber forest products (NTFPs), that include all biological products other than timber, are a traditional source of household income in rural areas around the world. NTFPs can provide an important means for economic growth and sustainable forest management in local communities. An important feature of NTFPs is the continuous flow of returns against timber returns that are available intermittently at an interval of rotation period and this feature can be used intelligently and strategically for conservation of forest resources through proper forest management practices. However, knowledge of NTFP marketing is limited and sparse

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8 [http://www.stat.gov.mk/Publikacii/5.4.11.02_688.pdf](http://www.stat.gov.mk/Publikacii/5.4.11.02_688.pdf) (23.11.2011, 04:20 PM)
(Newman and Hammett 1994) while timber marketing and trade is extensively discussed in forestry literature. Hence, NTFPs marketing must be examined before NTFPs can be developed as a means to economic growth and forest conservation (Fox 1994). Also driving of the market, are they are sold in the country or exported, in which quantities they are present on the market is unknown. Furthermore, would be established the current market situation, which is not specifically defined because of lack of appropriate legislation, regulation and laws. On that way, would be regulated the role of collectors, buyers and all other stakeholders. Therefore, this master thesis will be the first of this type and can be used as base for further successful research in this field.

1.3. Objectives

The overall goal of this master thesis is to analyze market potential of NTFPs in the Republic of Macedonia. In order to achieve this, the thesis will have the following objectives:

- Analyzing of policy framework;
- Evaluating the present NTFPs domestic supply for the internal and export markets;
- Analyzing market elements/actors (who is selling, who is collecting, who is buying);
- Defining the marketing elements for NTFPs promotion;

To ensure these objectives the following research questions have been defined:

- What are limitations and fostering factors for NTFPs market in Macedonia?
- To what extent the NTFPs market capacities are utilized?

Regarding the research questions the following sub-questions will be asked for better clarification, answering and understanding of research questions.

- How NTFPs are framed in Macedonian policy regulations? How the legislation treats NTFPs?
- Which are the main NTFPs on the market?
- What are NTFPs market elements?
- Which are the promotional marketing elements of NTFPs?
2. Theoretical framework

2.1. Marketing theory

The major purpose of marketing is to recognize the individual and societal needs. Therefore, the brief definition of marketing is to evaluate people’s needs profitably. In 1985, the American Marketing Association defines marketing as follow: marketing is the activity, set of processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large. The Marketing Institute of the Great Britain defines marketing as a managing and organizing process of a whole business operation from realizing and manipulating people’s interests and desirability to specific products to urge them buying those products. In addition, marketing’s responsibility is to deliver the products from manufacturers to the end consumers in order to gain the predictable profits.

According to Professor Philip Kotler, marketing is the process of satisfying customer needs and wants by the exchange methods. In general, marketing is the process of satisfying customer wants and needs while meeting organizational objectives. Marketing refer to the research and business analysis, plan distribution, promote sales, creating marketing plans and strategies to approach the marketplace.

The marketing concept is a management philosophy and management companies that meet the needs of consumers and users, to take over and coordinate marketing activities. That means that essence of marketing, the starting point is realized through the market concept.

One of the tool of marketing theory is marketing mix model 4Ps (Product, Price, Place and Promotion) + 2Ps (Public support, Political power).

The main reasons the marketing mix is a powerful concept are that it makes marketing seem easy to handle, allows the separation of marketing from other activities of the firm and the delegation of marketing tasks to specialists and the components of the marketing mix can change a firm’s competitive position (Grönroos, 1994).

The marketing mix concept is one of the core concepts of marketing theory. However, in recent years, McCarthy (1964) defined marketing mix as a combination of all of the factors at a marketing manager's command to satisfy the target market. Marketing mix often referred to as the “4Ps”, as a means of translating marketing planning into practice (Bennett, 1997).

Marketing mix is not a scientific theory, but merely a conceptual framework that identifies the principal decision making managers make in configuring their offerings to suit consumers’ needs. The tools can be used to develop both long-term strategies and short-term tactical programmes (Palmer, 2004). The idea of the marketing mix is the same idea as when mixing a cake. A baker will alter the proportions of ingredients in a cake depending on the type of cake we wishes to bake. According to Grönroos (1994) the marketing mix management paradigm has dominated marketing thought, research and practice since it was introduced almost 40 years ago. Marketing mix has been extremely influential in informing the development of both marketing theory and practice (Möller, 2006). The main reasons the
marketing mix is a powerful concept are It makes marketing seem easy to handle, allows the separation of marketing from other activities of the firm and the delegation of marketing tasks to specialists.

**Marketing Mix: Product, Price, Place and Promotion (4Ps) + Public support and Political power (2Ps)**

The marketing mix principles are used by business as tools to assist them in pursuing their objectives. The marketing mix principles are controllable variables, which have to be carefully managed and must meet the needs of the defined target group.

The four Ps + 2 Ps (product, price, place, promotion, public support, and political power) should work together in marketing mix. Often, decisions on one element will influence the choices available in others. Selecting an effective mix for market will take time and effort, but these will pay off as you satisfy customers and create a profitable business. According to Kotler (1984; 1986), when organizations attempt to enter markets abroad, they need to master the art of satisfying parties other than the target clients alone. These other parties include governments, trade unions and other interested groups who act as gatekeepers to their own market. Upon recognizing the political nature of this new marketing environment, Kotler introduced two further Ps, Public Relations and Political Power, which in marketing terms are known as "mega marketing".

The marketing mix is a part of the organisations planning process and consists of analysing the defined:

**PRODUCT:** “Product” refers to the goods and services you offer to your customers. Apart from the physical product itself, there are elements associated with your product that customers may be attracted to, such as the way it is packaged. Other product attributes include quality, features, options, services, warranties, and brand name. Thus, you might think of what you offer as a bundle of goods and services. Your product’s appearance, function, and support make up what the customer is actually buying. When an organisation introduces a product into a market they must ask themselves a number of questions. They must decide about the product design, which type of package will use and to add value to the product. Organization also should know for whom the product is aimed; what benefit will customers expect; how to position the product within market and advantage of the product over product competitors.

The actual product or service itself has to at least stand up to the rigors of the market, and ideally redefine the space it occupies. An overhaul of this component in business requires looking at both the physical product and also the offer that often defines it. If the offer and the product are both compelling and interesting, the bare bones of a marketing strategy are reached.

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9 Cole Ehmke, Joan Fulton, and Jayson Lusk, Department of Agriculture Economics, Marketing’s Four P’s: First Steps for New Entrepreneurs
10 Fahd Khan Afridi, Extended Services Marketing Mix and Emergence of Additional Marketing Ps, Journal of Managerial Sciences Volume III, Number 1
11 Cole Ehmke, Joan Fulton, and Jayson Lusk, Department of Agriculture Economics, Marketing’s Four P’s: First Steps for New Entrepreneurs
Customer research is a key element in building an effective marketing mix. Your knowledge of your target market and your competitors will allow you to offer a product that will appeal to customers and avoid costly mistakes. Think long term about your venture by planning for the ways you can deepen and broaden your product bundle. For instance, you may be able to take advantage of opportunities to add value through processing, packaging, and customer service. Other future growth may allow you to offer your product to different customers. A different type of growth would be a diversification of products, with your business offering related products. Offering a whole range of products is most successful if the raw materials, production processes, and distribution methods are similar, which means you do not have to acquire new suppliers, skills and equipment, and distribution methods.\(^\text{12}\)

**PRICE:** Pricing is one of the most important elements of the marketing mix, as it is the only mix, which generates a turnover for theorganisation. The remaining 3p’s are the variable cost for the organisation. The price point of the product or service is the essential element to the marketing mix. On a similar note, the price has to be just right in proportion to the other elements. It should be high, low or in between, depending on the market to which product is pitching and the message sent out by the other elements of the marketing strategy. Therefore “Price” refers to how much you charge for your product or service. Determining your product’s price can be tricky and even frightening. Your pricing approach should reflect the appropriate positioning of your product in the market and result in a price that covers your cost per item and includes a profit margin. The result should neither be greedy nor timid. The former will price you out of the market; pricing too low will make it impossible to grow. Whatever your price may be, ultimately it must cover your costs, contribute to your image by communicating the perceived value of your product, counter the competition’s offer, and avoid deadly price wars. Remember, price is the one “P” that generates revenue, while the other three “P’s” incur costs. Effective pricing is important to the success of your business.\(^\text{13}\)

**PLACE:** Refers to how an organisation will distribute the product or service they are offering to the end user. The organisation must distribute the product to the user at the right place at the right time. Place (i.e. Distribution) means ensuring that the product is in the right place for the customers to buy it. If, for example, you own a small retail store or offer a service to your local community, then you are at the end of the distribution chain, and so you will be supplying directly to the customer. Businesses that create or assemble a product will have two options: selling directly to consumers or selling to a vendor. Product characteristics and your sales volumes will dictate what inventories to maintain and how best to transport your products. Additionally, the logistics associated with acquiring raw materials and ensuring that your final product is in the right place at the right time for the right customers can comprise a large percentage of your total costs and needs careful monitoring. You may decide to have a combination of all the distribution methods.\(^\text{14}\)

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**PROMOTION:** “Promotion” refers to the advertising and selling part of marketing. It is how you let people know what you’ve got for sale. The purpose of promotion is to get people to understand what your product is, what they can use it for, and why they should want it. A successful product or service means nothing unless the benefit of such a service can be communicated clearly to the target market. You want the customers who are looking for a product to know that your product satisfies their needs. To be effective, your promotional efforts should contain a clear message targeted to a specific audience reached via an appropriate channel. Your target audience will be the people who use or influence the buying of your product. You should focus your market research efforts on identifying these individuals. Your message must be consistent with your overall marketing image, get your target audience’s attention, and elicit the response you desire, whether it is to buying your product or to form an opinion. The channel you select for your message will likely involve use of a few key marketing channels. Promotion may involve advertising, public relations, personal selling, and sales promotions. Promotion is perhaps the most traditional of the 4Ps. The most important practical step that can be implementing in this regard is a system for tracking and testing responsiveness to different marketing variables. To truly know the marketing mix, what promotional methods the organizations should know. This will allow organization to better allocate their resources and more effectively align marketing strategy.

**PUBLIC SUPPORT:** Civil society and the public at large can also be very important targets of influence, especially where there are well-developed and articulated “counter-views” to that of the private sector. The need to proactively convey a message and image to the public is now widely recognized within the forestry private sector, which has made increased efforts to shape the public’s view in a way that accords with its own practices and perceptions. “Public relations” is increasingly seen by the private sector as providing the catalyzing element in the political process; "(Politics) provides the packaging and the vehicle to achieve the industrial objectives...There are two elements to the political subsystem...the message and the target. The message needs to be short; for example, 'Trees are good. We need more trees not less'. Our objective should be to create and move inside an ever-increasing friendly circle of public opinion" (Fernandez Carro and Wilson, 1992). The promulgation of particular perceptions of forests has been necessary as a means of marketing forest products, as well as maintaining public support within the political process. Utilization of publicity and other non-paid forms of communication designed to present the organization and its products positively. It can decide when to issue press releases and hold events, but it cannot control the press that independently decides when to run the communication. Public supports the marketing function in different ways through organizational communication where messages promote a better understanding of the organization among employees, board members and other relevant public figures, than press relations where newsworthy information, such as new programs, is provided on a timely manner, therefore lobbying where communication with legislators and officials to promote or

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16 ftp://ftp.fao.org/docrep/fao/011/k2597e/k2597e07.pdf (11.01.2012 04:00 PM)
defeat legislation is a major activity and product publicity where newsworthy innovations or new attributes of products can be promoted at little cost through the media.\textsuperscript{17} According to Simon public relations exist to produce goodwill in the company's various publics so that the publics do not interfere in the firm's profit-making ability (Raymond Simon, 1984). Therefore public relations help an organization and its publics adapt mutually to each other. Goal of public relations are mutual understanding or positioning of the organization with its publics and positive perceptions and predispositions. Public relations' measure of success is expressed public opinion or other evidence of public support.\textsuperscript{18}

**POLITICAL POWER:** The media likes to talk about markets as if they were just a force of nature. In fact, markets and their outcomes are largely shaped by political power. In a capitalist system that power is largely used to advance the interests of those who own and run dominant corporations.\textsuperscript{19} Kotler (1984) has also advocated the importance of power and has rightly put it, although with a little tinge of corruption that marketers must win the influential support of industrial officials, legislators and government bureaucrats to enter and operate in the target market. The presence of such "barriers" often prevents effective marketing, resulting in wastage of resources in terms of time and efforts spent in trying to make the services as attractive as possible. To achieve this objective without sacrificing too many resources, Kotler (1984) advocates that marketers must have sophisticated lobbying and negotiating skills. Hence, in so far as marketing by a construction firm is concerned, one must not only know how to negotiate with the relevant authorities but also need to find out their future plans and needs for their economy, so that the firm may be able to offer its assistance and gain a ready entry into the market and an edge over its competitors.\textsuperscript{20}

\textsuperscript{17} http://star61451.tripod.com/marketingthelibrary/id10.html (11.01.2012 10:00 PM)
\textsuperscript{18} http://www.nku.edu/~turney/prclass/readings/mktmg.html (11.01.2012 10:25 PM)
\textsuperscript{19} http://thesocietypages.org/socimages/2011/09/29/market-outcomes-and-political-power/ (11.01.2012 10:30 PM)
\textsuperscript{20} A convergence of Western marketing mix concepts and oriental strategic thinking Low, Sui Pheng Tan, Martin C S. Marketing Intelligence & Planning, Bradford: 1995.Vol.13, Iss. 2, pg. 36, pgs. 11
3. Methodology and Methods

3.1. Methodology

This master thesis will be descriptive and explorative. Descriptive because the master thesis will be describe the current situation regarding the regulative framework relevant for NTFPs. Further the thesis will describe which NTFPs are present on the market in Macedonia, the importance of the products and also the organization and cooperation between the actors in the NTFPs sector (collectors, producers and traders). The thesis will also explore which factors are influencing and important for the market of NTFPs.

Marketing theory for the thesis purposes will be used as theoretical framework meaning that the research is deductive. The focus will be put on marketing mix tool: product, price, place and promotion (4Ps) + public support and political power (2Ps).

The NTFPs were divided in three groups: Mushrooms, Aromatic and medicinal plants; and Berries and other fruits. The further research will be on the actors involved in dealing with these three NTFPs as most collected, traded and important in the Republic of Macedonia, as well as other influences on the market of these NTFPs.

The research was focusing and took into consideration all active (registered) companies in the field of NTFPs in the Republic of Macedonia. Regarding that the list of active registered companies was taken from Central Register Office. The resulting list from Central Register Office contained other companies which are dealing with growing of cultivated mushrooms and other products. From that list were selected only those companies which are working with products that are examined in this research (mushrooms, aromatic and medicinal plants and berries and other fruits). Their number amounted 40 companies, which were contacted via phone and those companies which are willing to cooperate were approached. The number of companies willing to cooperate was 36. The number of companies which had not agreed to be approached is 10% of the total number of registered companies active in NTFPs sector. Therefore the determined sample was a statistical representative sample for the Republic of Macedonia. Regarding that the semi-structured questionnaire with owners or companies managers was done.

Because in the Republic of Macedonia there are no registered pickers, the most appropriate way to get this information about collectors was to ask companies active in the NTFP sector. At the end of the semi-structured questionnaire, the owners and managers were asked to provide researcher with the list of pickers (collectors) with whom they are collaborating. Then the pickers list from every company was summarized in one large list of pickers. The reason of summarizing in one list was to avoid overlapping of pickers (collectors). All pickers (collectors) were contacted and with those pickers (collectors) who are willing to cooperate was conducted a semi-structure questionnaire.
3.2. Methods

For the master thesis purpose, the secondary and primary data were used. Secondary data by collecting previous papers on this topic in the Republic of Macedonia, then policy documents Law on Forest (Official Gazette of RM No 64/2009); Law on Environment (Official Gazette of RM No 53/05); Law on Nature protection (Official gazette of RM No 67/04); Biodiversity Strategy and Action Plan for the Republic of Macedonia (2006)\(^\text{21}\), Strategy for Sustainable Development of Forestry in the Republic of Macedonia (2008)\(^\text{22}\), Law on Trade (Official Gazette of RM No 16/04)\(^\text{23}\) etc. Therefore, content analyses method for this purpose was used according to the key word: “non wood forest products” or “other products”.

Collection of primary data was by survey with two different semi-structured questionnaires, one for companies active in the field of NTFPs (buyers, processors and traders) and one for pickers (collectors) in the field. The necessary data were collected in two to three months, starting from January till March 2012. Semi-structured questionnaires for companies gave answers and information which are important for this research such as: type of NTFPs company is dealing with; the market of the products (national or international (export)); the interviewer opinion about the stability of the market of NTFPs; cooperation with local population and evaluation of the cooperation; the average prices per NTFPs (buying/selling); identifying the main problems in business (process of buying, selling, trading of NTFPs); capacity of the company and percentage of capacity utilization; usage of the marketing tools (PR, Advertising, Branding) (to determine the most successful and importance of marketing tools); business environment and cooperation with other companies (private, state), necessary documentation for the process (buying, selling, exporting, processing etc). The collected data were processed with statistical program for data processing – SPSS.

The picker’s (collector’s) questionnaire provides information such as: type of NTFP, way of collection (individual or in group), importance regarding the family budget, process of selling (to whom they sell, raw or process NTFPs, how often sell), relations with the buyer/s, identifying the most important problems on the collection of NTFPs, problems connected with the market, education and training courses. After collection of all questionnaires, the data was processed on similar way as companies’ data with statistical program for data processing – SPSS.

Semi structured questionnaire for the companies (processors) had 44 questions. Each of these questions was analyzed separately. Questionnaire for companies has six parts. At the beginning first two parts refer to the socio demographic questions or profile for the respondents and general information about the companies. Third part refer to the buying of NTFPs, with which NTFPs they are dealing and in what quantities, type of supplying of NTFPs, cooperation with other people or companies, price of the products etc.

\[^{21}\text{www.catsg.org/balkanlynx/05_wildlifemanagement/5_4_biodiversity/Pdfs/DarrellSmith_2003_Biodiversity_s strategy_action_plan_FYR_Macedonia.pdf}\] (24.11.2011, 05:28 PM)
\[^{22}\text{www.MAFWE.gov.mk/WBStorage/Files/NSSD\%202\%20EN.pdf}\] (24.11.2011, 05:23 PM)
follows the fourth part which encompasses processing of NTFPs, next operations after buying and equipment that companies have at the moment. Fifth part of the questionnaire refer to the selling and trading with NTFPs, importance of the marketing tools, and which marketing tools are most successful, while sixth part refer to the business analysis, capacity and percentage capacity of utilization, also cooperation with other neither private or state companies. Second semi-structured questionnaire refers to the collectors (pickers) and had 27 questions, and also each of them was analyzed separately. Questionnaire for pickers has three parts which refers to the socio demographic profile of pickers at the beginning. The second part of the questionnaire is about the process of collection of NTFP (quantities, tools, usage/selling) and third part refers to the market condition.
4. Results

4.1. Content analysis

To fulfill the one of above mentioned objectives, analyzes of policy framework, will be used content analysis on the policy documents related to regulation system of NTFPs in the Republic of Macedonia. The institutional framework of competence for non-timber forest products in the Republic of Macedonia is mainly divided between the two sectors: the sector of forestry and ecology. Department of Forestry and Game Management, under the Ministry of Agriculture, Forestry and Water Management (Law on Forests, Strategy for Sustainable Development of Forestry in the Republic of Macedonia) is responsible for creating the Rulebook of non-timber forest products24, as well as the creation of forest policy in the Republic of Macedonia. Rulebook of non-timber forest products prescribed that species of forest products may include products of biological and mineral origin in the forest and forest grounds, such as moss and lichen, ferns, medicinal and aromatic plants, other plants and their parts (roots, bark, leaves, fruit, etc..), mushrooms, resins, game etc. as well as manner of utilization and collecting other forest products. Also the use or collection of forest products should be done in a way that would violate the natural populations of the species and thus maintain their biodiversity, productivity, capacity for regeneration and their potential to fulfil now and in future environmental, economic and social functions, in accordance with forest management plans. Also in the collection of other forest products should be required to be kept 50% of the bulbs and foliage, 30% of flowers, fruits and seeds and 20% of plants for future regeneration. Also should be taken into consideration that during the collection of non-timber forest products to not be damaged other vegetation, trees and grounds.

PE Macedonian Forests manages 90% of state forests in the Republic of Macedonia. The PE MF there are 10 sectors, including the Department for the use of non-timber forest products, ecology, fishing, hunting, farms and fish ponds. Department for the use of non-timber forest products, ecology, fishing, hunting, farm and fish farm is responsible for the use and management of non-timber forest products in the forests which are managed by PE MF. PE MF has developed Pricelist for the collection of non-timber forest products where price is prescribed and should be paid by NTFPs species25 (but mostly the 15% of the buying prices). Also PE MF in accordance with Article 72, paragraph 3 of the Law on Forests to be entitled under the contract or the use of collecting non-timber forest products to other individuals and subjects. The fee for issuing the annual licenses for individuals to collect forest products amounted to 1.000,00 denars (16 euro), and fee for subjects for opening point of buying for non-timber forest products is 35.000,00 denars (570 euro).

24 Official Gazette of RM No. 155/11
The Law on Trade\textsuperscript{26} regulates the conditions and manner of performing the trade of domestic and external markets, measures to limit the performance of trade and safeguard measures (Article 1). Under this law, trade is buying and selling of goods and performance of commercial services that can be performed by legal entities and individuals registered for that activity (Article 2). Also in Article 4 of the Law, provided that trade is made freely and under equal conditions on the market that does not hinder competition, does not cause harm to consumers and the environment and human health and also in accordance with the law, international treaties and agreements. This law stipulated that the trade is made as wholesale, retail trade, electronic trade, performing trade from door to door and giving service to trade (Article 6). Just as trade goods to final consumers are considered trade goods for personal consumption and trade of goods for the household. Article 13 in the law prescribes trade retail markets where trades and wholesale of agricultural products under the conditions prescribed by law and other regulations. Trader who organized a green market in which trades and wholesale under the conditions prescribed by law and other regulations may issue sales points of traders or craftsmen who are registered in the appropriate register. Thereby the goods are released into circulation should be meet the physical chemical properties, be packaged, declared, labelled and marked in accordance with law. Also goods must conform to the prescribed technical requirements accompanied by documents specified in the technical regulations with service, spare parts without which products can be used. In addition the goods must meet minimum technical requirements and other conditions prescribed by law depending on the type and manner of performing the trade (Article 22). In this article is provided that those conditions are prescribed by the Minister of Economy. Exports and imports of certain goods can be made on the basis of license and protection of plants, animals and seed and other agricultural products, environmental protection and spatial planning. Goods that are exported and imported on the basis of a license issued by the competent authority shall determine on the Government proposal of the Ministry of Economy.

The strategic framework includes strategies in defining the NTFPs, while regulating their use in Macedonia. There are strategies for sustainable development of forestry and biodiversity in the Republic of Macedonia.

In addition to the strategy of sustainable forestry development in the RM\textsuperscript{27}, "other forest products", such as herbs, parts of plants, fungi, fruits, etc., described as a resource to provide material goods. Confirmation to the Constitution of the Republic of Macedonia where states that "all natural resources in the Republic of Macedonia, plant and animal world, good in general use, as well as objects and objects of special cultural and historical significance, declared by law for the good of general interest for the Republic and special protection"\textsuperscript{28}. Management of non-timber forest products contributes significant economic benefits and government sectors, and is therefore governed by the legislation. Product competitiveness in the European market will provide modern infrastructure and associated facilities for collecting, processing and marketing of forest products. Protection of economically and

\textsuperscript{26} Official Gazette of RM No. 15/04

\textsuperscript{27} Strategy for Sustainable Development of Forestry in the Republic of Macedonia, 19 June, 2006

\textsuperscript{28} Constitution of the RM (Official Gazette of RM No. 1/92)
ecologically valuable species and biodiversity of the country conducted limiting the possibility for excessive use of NTFPs and biological capacity. Republic of Macedonia has significant resources of non-timber forest products. Encouraging the use of these products is done through the integrated forest management, based on the sustainable economic, socio-economic and ecological approach, thereby ensuring conditions for sustainable use and extra income of local people. Measures to be taken are based on an implementation study (inventory) of natural sites, the amount of potential in them and the capacity for collection and processing of NTFPs. You should then create a normative, institutional and economic framework for the proper use and regulation of NTFPs. We should promote environmentally friendly methods and practices using NTFPs, but also to support small and medium enterprises engaged in buying, processing and marketing of NTFPs, especially when it comes to new opportunities of employment and increase incomes in rural households. You need to quantify the overall value and functions of forests, and develop instruments for the realization of additional revenue from the NTFPs. The next goal is related to the conservation of biological and landscape diversity of the Macedonian forests, through the integration of the objectives of forest protection in practice. It should also be coordinated implementation of existing strategies and action plans for biodiversity protection in the Republic of Macedonia.

In addition to making strategic document, the MoEPP issues the permits for import and export of endangered and protected wild plants, mushrooms and animals and their parts. Permits issued by the competent authorities of the MoEPP, and to the Department of General Affairs and Department of Environment. Imports and exports are forwarded with some additional data and documents that go along with the search for import export license. According to Biodiversity Strategy and Action Plan of the Republic of Macedonia there are legal regulations covering non timber forest products (Regulations on the Manner of Use of Other Forest Products, (Official Gazette of the Republic of Macedonia 13/00), but they do not provide a mechanism for obtain in gap precise assessment of the current status of wild plant species. At the same time NTFPs are of greatest economic importance for the Republic of Macedonia and one of priorities is to prepare new regulations defining the sustainable use of the species. Also in this strategy is explained the enormous economic value of mushrooms for the local population, but also is mentioned that there is no published data on the number of collectors or the quantity of fresh wild mushrooms buying domestically. Therefore, of the species collected locally for food, some (Agaricus spp., Amanita caesarea, Boletus spp., Cantharellus cibarius, Craterellus cornocopioides, Lactarius deliciosus, Macropleiota procera and Morchella spp.) can also be found in markets across the country. From the other side the mushroom species most often buying for export is: Boletus aereus, B. edulis, B. pinophilus, B. reticulatus, Cantharellus cibarius and Morchella spp. They represent an important export product (328,693kg/year; estimated value $2,000,000) for the companies registered to buying wild-collected mushrooms, but the real quantity collected per year is

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30 Strategy for Sustainable Development of Forestry in the Republic of Macedonia, 19 June, 2006 (3.1.3. Other forest products (medicinal plants, forest fruits, mushrooms, along with goals and measures)
unknown. Although a permit for the export of commercial species can be obtained from the MoEPP (MAFWE), no regional or local productivity data exist on which to base sustainable use restrictions. On the other hand in this strategy is written that in the Republic of Macedonia, there is virtually no cultivated tea production. Local citizens collected herbal teas for personal use and for sale to various companies and there is prescribed amount of the tea exported in 2001 (1,127,825 kg. with at total value of $ 1,453,052) and in other years ($ 4.5 to 5 million). Wild fruits and nuts consist mainly of high mountain fruits. Blueberries (Vaccinium myrtillus) are used chiefly for export (in 2001, 83,284 kg worth $ 86,196) and in recent years has been increase collection of juniper berries (Juniperus communis) for the production of essential oils. After berries, by intensity of collection follow dogrose (Rosa canina), raspberry (Rubus idaeus), blackberry (Rubus spp.), cornelian cherry (Cornus mas) and blackthorn (Prunus spinosa).

The legislative framework relating to NTFPs are contained in laws and regulations in different areas. Regulation is primarily related to the Law on Forest Protection and Nature, and there are sub-legal acts in the field of forestry and nature protection, usually in the form of rules and regulations to limit the collection to use and trade of indigenous wild mushrooms.

The law that regulates substance related to forests is Law on Forests in the Republic of Macedonia, which defines and regulates the function of forests, forest types by purpose, forest products, forest protection and use, integrated management and production functions of forests.

Article 9 of the Law on forests, forest production functions are regulated in the direction of the production of timber and other forest products. Also, Article 10 is indicated that the forests for economic purposes are primarily used for production of wood assortments, as well as non-timber forest products and services.

In the area of law where are mentions the sustainable management of forests (Article 13), prohibits the intentional removal and reduction of populations of non-timber forest products and their destruction in any other way. Also, in the same article prohibits the collection of non-timber forest products (mushrooms, fruits, herbs, etc.) in quantities greater than 1 kg, without a license from owners or users of the forest.

In Article 72, prohibits the use of non-timber forest products that are highly protected. Using or collecting non-timber forest products can be made only if so provided by specific plan. Also, in this article it is stated that when there is danger of extermination of individual plant species types Minister in charge of the competent government authority for the area of forestry, in cooperation with the Minister responsible for the operations in the field of environment and spatial planning, may temporarily restrict or prohibit collection and use of forest products. The use or collection of NTFPs is performed in a way that will not lead to the extermination of individual plant species and thereby not cause any damage to forests. Manner of utilization and collection of NTFPs is prescribed by the minister in charge with the state administration responsible for forestry.

To keeping the forest and review of all the funds which are stored wood and non-timber forest products are authorized members of the forest police (section 82). Also, Article 91 provides that entities that manage forests can make a profit by collecting, producing and selling wild berries, mushrooms and herbs. On the other hand, Article 98 of this Law
prescribes that the supervision and control of traffic of NTFPs is performed by the State Market Inspectorate. According to Article 23 and 35 of the Law on Nature Protection\textsuperscript{32}, Minister of Environment and Physical Planning adopted the Regulation for issuing collection permits affected and protected forms of wild plants, mushrooms and animals and their parts\textsuperscript{33}. It also made the list for establishing strictly protected and protected wild species\textsuperscript{34}. Also, this law was passed orders to prohibit the collection for use and trade of indigenous wild mushrooms (genera \textit{Morchella}, \textit{Verpa} and \textit{Ptichoverpa}\textsuperscript{15}), and amendments to these same commands\textsuperscript{36}. According to the Law on Environment\textsuperscript{37}, NTFPs or plants or parts of plants, fungi, etc. reflected the natural resources and they are integral part of nature (Article 5). Also, this law regulates the collection of fees for legal and physical persons that use natural resources exploitation of forests, collection and export of plants and their parts. Article 179 regulates the amount of compensation payable for a license for the export of endangered and strictly protected plants and their parts. Phytosanitary administration is responsible for issuing phytosanitary certificate for the import and export of forest products.

4.2. Survey results for companies

In the following are results of the surveys with semi – structured questionnaire for companies (processors) in the Republic of Macedonia. For this purpose, the answers to the 44 questions (Q1 – Q44) are grouped into socio – demographic profile, present market situation, market elements and actors, selling and trading NTFPs, institutional aspects, marketing tools.

4.2.1. Socio - demographic profile of companies’ owners and general information about companies (Q1 - Q9)

The total number of respondents is 36, where the youngest respondent is 21 years old and the oldest 64 years (Q1). The mean value of their age is 46 years, whereas 8.3 % are at the age between 21 - 31 year, 13.9 % at the age 32 - 42, 55.6 % at the age 43 - 53 and 22.2 % at the age 54 - 64 years (Fig. 1).

\textsuperscript{32} Official Gazette of RM No. 84/07
\textsuperscript{33} Official Gazette of RM No. 102/09
\textsuperscript{34} Official Gazette of RM No. 139/11
\textsuperscript{35} Official Gazette of RM No. 161/08
\textsuperscript{36} Official Gazette of RM No. 56/09
\textsuperscript{37} Official Gazette of RM No. 53/05
Figure 1: Age of companies’ owners

![Age Distribution Chart]

Male respondents (Q2) dominate with 72.2 % and 27.8 % are female (Fig. 2).

Figure 2: Sex of companies’ owners

![Gender Distribution Chart]

The majority of respondents 44.4 % have faculty level education (Q3), then 36.1 % are with lower secondary education, 13.9 % have completed upper secondary and only 5.6 % are with more than college education (masters, doctors). Neither respondent have a primary education (Fig. 3).
The largest percentages of respondents (63.9 %) are owners in their companies, 30.6 % are managers and 5.6 % are PR representatives of the companies (Q4). Neither of respondents are not just employees, consultants or something else in the companies (Figure 4). 30 % from the owners and managers are female, while 70 % are male persons.

Most of the companies (Q5) are located in the city 77.8 %, 19.4 % are located in the village, and only 2.8 % are located in the city and village (Fig. 5).
The number of employees (Q6) in companies are different but usually varied from 1 to 4, or 66.7% of companies have so many employees. Little bit more employees, from 5 to 8 have 13.9% of companies, from 9 to 12 employees have 11.1% and between 13 to 16 employees have 5.6%. Exception from this in the number of employees is a company that also represents outlier in this study because the number of employees in the company is 2500 or 2.8%, which largely differs from the number of employees of other companies in the survey (Fig. 4.2.6).

From this question (6.a.) may be noticed that most of the companies 75% have between 1 and 30 seasonal workers employed, then 16.7% have from 31 to 60 employed seasonal workers, and only few of them about 2.8% have more employees which is between 61 and 150 seasonal workers hired. The mean number of seasonal workers employed is 26 (Fig. 7).
Figure 7: Seasonally hired workers

Most of the companies 52.8% are established between 2001 and 2008, other companies 27.8% are formed between 1985 and 1992 and 16.7% between 1993 and 2000 year (Q7). The exception occurs only in a company formed earlier in 1945 (2.8%) which it is again outlier in the survey (Fig. 8).

Figure 8: Year of establishing the companies

All companies dealing with the same activity from the very beginning of their formation (Q8), their performance from the beginning is associated only with NTFPs.

Future research on the issue and the subject handled in this thesis should be directed to consider the socio demographic profile of the companies and determine whether socio demographic profile has an impact on the success of companies.

Main activities (Q9) of the examined companies are collecting, buying, processing and selling of NTFPs. Therefore all companies dealing with buying and selling of NTFPs, 94% dealing other than buying and selling also and processing of NTFPs and 36% occurs as
collectors of NTFPs despite the buying and selling. Very small part of the companies 6 % are dealing with other activities (cultivation of medicinal and spicy plants) at the same time (Fig. 9).

Figure 9: Main company’s activities

According to descriptive results we can conclude that buying, processing and selling are main companies activities, but Chi – square test shown that neither of them is most common activity because there is no statistically significant difference. Therefore we cannot say which company’s activity is most common activity (Chi – square test = 0.075, df = 2, p = 0.963).

4.2.2. Present market situation (Q10 - Q14)

According to the answers (Q10), 80.6 % are engaged in the buying of mushrooms with the average quantity of 91 793 kg per year, 34.3 % are engaged in the buying of aromatic and medicinal plants with an average quantity of 322 583 kg per year, 63.9 % dealing with the buying of berries and other fruits with an average quantity of 67 456 kg per year and 54.8 % are engaged in the buying of other NTFPs (juniper, dog rose, blackberries, wild apple) with an average quantity of 85 559 kg per year (Tab. 1).

Table 1: Total average quantity of NTFPs

<table>
<thead>
<tr>
<th>Products quantities</th>
<th>Min.</th>
<th>Max.</th>
<th>Sum</th>
<th>Mean</th>
<th>Frequency</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>1500</td>
<td>400000</td>
<td>266200</td>
<td>91793</td>
<td>29</td>
<td>80.6</td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td>500</td>
<td>300000</td>
<td>387100</td>
<td>322583</td>
<td>12</td>
<td>34.3</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>1000</td>
<td>500000</td>
<td>155150</td>
<td>67456</td>
<td>23</td>
<td>63.9</td>
</tr>
<tr>
<td>Other</td>
<td>2000</td>
<td>300000</td>
<td>145450</td>
<td>85559</td>
<td>17</td>
<td>54.8</td>
</tr>
<tr>
<td>Total</td>
<td>5000</td>
<td>420000</td>
<td>9 539 000</td>
<td>567391</td>
<td>81</td>
<td></td>
</tr>
</tbody>
</table>

From the descriptive analysis presented in the table above we can conclude that the highest total average quantity is the average of the aromatic and medicinal plants. But this was not shown as statistically significant, i.e. the null hypothesis that the averages of each products
quantity are statistically significant different is rejected (Kruskal - Wallis test = 2.494, df = 3, p = 0.476) (Tab. 2).

Table 2: Average quantity of NTFPs

<table>
<thead>
<tr>
<th>Products quantity</th>
<th>No.</th>
<th>Mean Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>29</td>
<td>43.26</td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td>12</td>
<td>40.00</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>23</td>
<td>35.07</td>
</tr>
<tr>
<td>Other</td>
<td>17</td>
<td>45.88</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>81</td>
<td></td>
</tr>
</tbody>
</table>

(Kruskal – Wallis test = 2.494, df = 3, p= 0.476)

From this question the null hypothesis of equal representation of all NTFPs was assumed. From the processed results with Chi square test we can conclude that the representation of all NTFPs is equal. Therefore follows that the null hypothesis have to reject, or representation of NTFPs is significantly different (Chi - square test = 8.037, df = 3, p = 0.045).

Most of the companies are dealing with mushrooms and berries and other fruits, after that followed other NTFPs, and finally aromatic and medicinal herbs. The null hypothesis of equal dealing with NTFPs on the companies was assumed. The results of Chi square test shown that we reject the null hypothesis, i.e. there is statistically significant difference between proportion of which NTFPs companies are dealing (Chi - square test = 6.531, df = 1, p = 0.011).

On the question how to buying NTFPs (Q11), results shows that the largest percentage of respondents (25.4 %) responded that the pickers come into their companies and by themselves are bring the collected products in the companies. After that followed supply of NTFPs through visiting the villages with 23.7 %. Next manner for supply of NTFPs is having its own list of pickers and contact with them 21.2 %, therefore followed owning buying points (centers) by their own 17.8 % and finally using of buying points by other companies 11.9 % (Tab. 3).

Table 3: Type of supply of NTFPs

<table>
<thead>
<tr>
<th>Type of supply of NTFPs</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own buying points</td>
<td>21</td>
<td>17.8</td>
<td>17.8</td>
<td>17.8</td>
</tr>
<tr>
<td>Use other buying points</td>
<td>14</td>
<td>11.9</td>
<td>11.9</td>
<td>29.7</td>
</tr>
<tr>
<td>Pickers come in our company</td>
<td>30</td>
<td>25.4</td>
<td>25.4</td>
<td>55.1</td>
</tr>
<tr>
<td>Own picker list and contact them</td>
<td>25</td>
<td>21.2</td>
<td>21.2</td>
<td>76.3</td>
</tr>
<tr>
<td>Village visit</td>
<td>28</td>
<td>23.7</td>
<td>23.7</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>118</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>
For this question null hypothesis of equal proportion of all offered types for buying of NTFPs was assumed. According to results of Chi square test, over this statistical data, we accept the null hypothesis, i.e. there is no statistically significant difference between the proportions (Chi - square test = 6.831, df = 4, p = 0.145) (Tab. 4).

Table 4: Proportion of all offered types for buying of NTFPs

<table>
<thead>
<tr>
<th>Type of supply of NTFPs</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own buying points</td>
<td>21</td>
<td>23.6</td>
<td>-2.6</td>
</tr>
<tr>
<td>Use other buying points</td>
<td>14</td>
<td>23.6</td>
<td>-9.6</td>
</tr>
<tr>
<td>Pickers come in our company</td>
<td>30</td>
<td>23.6</td>
<td>6.4</td>
</tr>
<tr>
<td>Own picker list and contact them</td>
<td>25</td>
<td>23.6</td>
<td>1.4</td>
</tr>
<tr>
<td>Village visit</td>
<td>28</td>
<td>23.6</td>
<td>4.4</td>
</tr>
<tr>
<td>Total</td>
<td>118</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Chi - square test = 6.831, df = 4, p = 0.145)

Type of transport vehicle (Q12) which usually are used for buying of NTFPs is van 38.5 %, followed car with 32.3 %, than truck 26.2 % and other vehicle for transport 3.1 % (truck with refrigerator, bicycle) (Tab. 5).

Table 5: Type of transportation

<table>
<thead>
<tr>
<th>Type of transportation</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Van</td>
<td>25</td>
<td>38.5</td>
<td>38.5</td>
<td>38.5</td>
</tr>
<tr>
<td>Car</td>
<td>21</td>
<td>32.3</td>
<td>32.3</td>
<td>70.8</td>
</tr>
<tr>
<td>Truck</td>
<td>17</td>
<td>26.2</td>
<td>26.2</td>
<td>96.9</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>3.1</td>
<td>3.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>65</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

The results of this question show that van and car are the most common types of vehicles used for the buying of NTFPs. Therefore the null hypothesis of equal importance to all type of transportation in the buying of NTFPs was assumed. According to results of Chi – square test, over this statistical data, we reject the null hypothesis, i.e. there is statistically significant difference between which vehicles have been used during the buying of NTFPs (Chi - square test = 11.215, df = 1, p = 0.001).

The average distance on the companies to the buying points of NTFPs was 105 km (Q13), where the minimum distance was 10 km and maximum distance was 300 km. The 100 km of average distance from companies to the buying points of NTFPs was assumed. According to one simple t test results with null hypothesis that the average distance on the companies to the buying points of NTFPs differs statistically significant from 100 km failed, i.e. we can say that average distance is around 100 km (t = 0.431, p = 0.669) (Tab. 6).
Table 6: Average distance from company to buying points (km)

<table>
<thead>
<tr>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average distance from company to the buying points (km)</td>
<td>36</td>
<td>10</td>
<td>300</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(t = 0.431, p = 0.669)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Type of correlation between capacity and percentage of capacity utilization per year of the companies for mushrooms, aromatic and medicinal plants and berries and other fruits and average distance from the companies to the buying points of NTFPs were examined. Capacity of the company for mushrooms is positively related to the average distance from companies to the buying points, with a coefficient \( r = 0.603^* \) (substantial to very strong relationship) significant at level 0.001. But percentage of capacity utilization per year for mushrooms is negatively related to the average distance from companies to the buying points, with a coefficient \( r = -0.022 \) (trivial relationship) significant at level 0.908. Capacity of the company for aromatic and medicinal plants is negatively related to the average distance from companies to the buying points, with a coefficient \( r = -0.100 \) (near perfect relationship) significant at level 0.798. Therefore percentage of capacity utilization per year for aromatic and medicinal plants is negatively related to the average distance from companies to the buying points, with a coefficient \( r = -0.090 \) (trivial relationship) significant at level 0.804. Capacity of the company for berries and other fruits is positively related to the average distance from companies to the buying points, with a coefficient \( r = 0.520^* \) (substantial to very strong relationship) significant at level 0.008. Also percentage of capacity utilization per year for berries and other fruits is positively related to the average distance from companies to the buying points, with a coefficient \( r = 0.272 \) (low to moderate relationship) significant at level 0.188.

The average value of people/companies that cooperate with companies during the buying of NTFPs was 122 people/companies (Q14). The minimum value was 2, while the biggest value was 2000 people/companies. Cooperation on the companies with 120 people/companies during the buying of NTFPs was assumed. According to one simple t test results with null hypothesis that cooperation on companies during the buying of NTFPs differ statistically significant from 120 people/companies failed, i.e. we can say that the number of people/companies that cooperate with companies was around 120 during the buying of NTFPs \( (t = 0.034, p = 0.973) \) (Tab. 7).

Table 7: Cooperation with people/companies during buying NTFPs

<table>
<thead>
<tr>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>With how many people/companies do you cooperate, when buying NTFPs</td>
<td>36</td>
<td>2</td>
<td>2000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>(t = 0.034, p = 0.973)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4.2.3. Market elements and actors (Q15 - Q21 and Q30 - Q33)

The price of NTFPs varies widely and depending on the weather, the quantity of representation and collection of NTFPs, and also the quality of NTFPs (Q15). This phenomenon is mostly noted with mushrooms because they have big differences in prices depending on the time of collection, whether it is a spring collection of mushrooms or autumn collection of mushrooms and certainly also from the quality that mushrooms have been associated with time when gathering mushrooms itself. Therefore the price of all NTFPs is calculated with weighted average of all prices that have been given in response to the respondents (Tab. 8).

Table 8: The prices of NTFPs

<table>
<thead>
<tr>
<th></th>
<th>Average buying price per kg in EUR</th>
<th>Average selling price per kg in EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>4.02</td>
<td>5.58</td>
</tr>
<tr>
<td>Aromatic and medicinal plants</td>
<td>2.44</td>
<td>7.18</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>1.54</td>
<td>1.95</td>
</tr>
</tbody>
</table>

Also it can be noted that there are two levels of companies, one which buying from the pickers and selling products in other bigger companies from them. These firms do not export products from the Republic of Macedonia. From the other hand, there are other companies, which are certainly larger than the previous ones who buying products from them and exported to markets in Europe and worldwide (Tab. 9).

Table 9: Buying and selling price of NTFPs in domestic and foreign market (export)

<table>
<thead>
<tr>
<th></th>
<th>Internal market</th>
<th>External market (export)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Average buying price per kg in EUR</td>
<td>Average selling price per kg in EUR</td>
</tr>
<tr>
<td>Mushrooms</td>
<td>6.70</td>
<td>9.25</td>
</tr>
<tr>
<td>Aromatic and medicinal plants</td>
<td>4.69</td>
<td>12.55</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>2.47</td>
<td>3.12</td>
</tr>
</tbody>
</table>

Changed the price of products in the last period (year) have been notes in 75 % of response from companies, which answered positively on this question, while the remaining 25 % responded negatively to the question, did not have change the price of products (Q16). For this question the null hypothesis about lack of change in price in the last period, was assumed. These results shown that changing the price of products in the last period (year) is
statistical significant different from the null hypothesize that we supplied, i.e. we reject the null hypothesis (Chi - square test = 9.000, df = 1, p = 0.003) (Tab. 10).

Table 10: Change in price

<table>
<thead>
<tr>
<th>Changing the price of products</th>
<th>Frequency</th>
<th>Valid percent</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>27</td>
<td>75.0</td>
<td>27</td>
<td>18.0</td>
<td>9.0</td>
</tr>
<tr>
<td>No</td>
<td>9</td>
<td>25.0</td>
<td>9</td>
<td>18.0</td>
<td>-9.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>100.0</td>
<td>36</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Chi - square test = 9.000, df = 1, p = 0.003)

The reasons for change the price of products in the last period (year) can be classified into several groups each certainly are closely related and interdependent. The results shows that highest percentage 51.2 % of respondents think that the reason for changing the price of products is the global market which determines the price of the products. Then follows the demand and consumption of the products with 14.6 %, quantity and quality of products with 12.2 %, unfair competition as a reason for change the price of products participate with 9.8 % and other reasons (change in the price of product on the market, change of market conditions, and weather conditions) which participate with 12.2 % in change the price of products (Tab. 11).

Table 11: Reasons for changing the products price

<table>
<thead>
<tr>
<th>Reasons for changing the price of products</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global market</td>
<td>21</td>
<td>51.2</td>
<td>51.2</td>
<td>51.2</td>
</tr>
<tr>
<td>Demand, supply</td>
<td>6</td>
<td>14.6</td>
<td>14.6</td>
<td>65.9</td>
</tr>
<tr>
<td>Quantity, quality</td>
<td>5</td>
<td>12.2</td>
<td>12.2</td>
<td>78.0</td>
</tr>
<tr>
<td>Unfair competition</td>
<td>4</td>
<td>9.8</td>
<td>9.8</td>
<td>87.8</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
<td>12.2</td>
<td>12.2</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>41</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Chi - square test = 4.122, df = 1, p = 0.042)

The null hypothesis of equal participation of these reasons in changing the price of products in the last period (year) was assumed. The results with Chi - square test shown that the global market, supply and demand of products (causes with the largest percentage of influence in changing the price of products) are statistically significant in influencing the changing the
price of products in the last period, therefore we reject the null hypothesis (Chi - square test = 4.122, df = 1, p = 0.042).

Payment (Q17) for buying of NTFPs is made on transaction account 75 %, 69.4 % in cash and 8.3 % otherwise (weight notes for pickers, invoices) (Tab. 12).

Table 12: Way of payment for buying of NTFPs

<table>
<thead>
<tr>
<th>Way of payment for buying of NTFPs</th>
<th>Responses</th>
<th>Percent of cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>In cash</td>
<td>25</td>
<td>45.5%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>69.4%</td>
</tr>
<tr>
<td>Bank account</td>
<td>27</td>
<td>49.1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>75.0%</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>5.5%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8.3%</td>
</tr>
<tr>
<td>Total</td>
<td>55</td>
<td>100.0%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>152.8%</td>
</tr>
</tbody>
</table>

(Chi - square test = 0.018, df = 1, p = 0.893)

The null hypothesis of equality for payment for buying of NTFPs was assumed. Therefore the results of Chi square test shown that there is no statistically significant difference in the way of payment for buying of NTFPs, i.e. the null hypothesis is accepted (Chi - square test = 0.018, df = 1, p = 0.893).

For the main problems faced by the buying of NTFPs (Q18) are offered several statements that respondents had to evaluate each separately and to add another statement which is considered to be occurs as a major problem with the buying of NTFPs. The stated problems they face during the buying of NTFPs which respondents had to evaluate and add others if they believe that exist with their frequency are given in the following table (Tab. 13).
Table 13: Main problems facing during buying NTFPs

<table>
<thead>
<tr>
<th>Main problems facing during buying NTFPs</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lack of forest road</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>2.8</td>
</tr>
<tr>
<td>Disagree</td>
<td>16</td>
<td>5.3</td>
<td>44.4</td>
<td>47.2</td>
</tr>
<tr>
<td>Neutral</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
<td>61.1</td>
</tr>
<tr>
<td>Agree</td>
<td>11</td>
<td>3.6</td>
<td>30.6</td>
<td>91.7</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td><strong>High price of the NTFPs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>2.8</td>
</tr>
<tr>
<td>Disagree</td>
<td>12</td>
<td>3.9</td>
<td>33.3</td>
<td>36.1</td>
</tr>
<tr>
<td>Neutral</td>
<td>9</td>
<td>3.0</td>
<td>25.0</td>
<td>61.1</td>
</tr>
<tr>
<td>Agree</td>
<td>12</td>
<td>3.9</td>
<td>33.3</td>
<td>94.4</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>97.2</td>
</tr>
<tr>
<td>I don’t know</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td><strong>Lack of buying points</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>7</td>
<td>2.3</td>
<td>19.4</td>
<td>19.4</td>
</tr>
<tr>
<td>Disagree</td>
<td>19</td>
<td>6.3</td>
<td>52.8</td>
<td>72.2</td>
</tr>
<tr>
<td>Neutral</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>77.8</td>
</tr>
<tr>
<td>Agree</td>
<td>8</td>
<td>2.6</td>
<td>22.2</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agree</td>
<td>1</td>
<td>.3</td>
<td>6.7</td>
<td>6.7</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>14</td>
<td>4.6</td>
<td>93.3</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>15</td>
<td>4.9</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td><strong>Problems in other</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unfair competition</td>
<td>7</td>
<td>19.4</td>
<td>36.8</td>
<td>36.8</td>
</tr>
<tr>
<td>Excessive state interference</td>
<td>3</td>
<td>8.3</td>
<td>15.8</td>
<td>52.6</td>
</tr>
<tr>
<td>Small quantity of mushrooms</td>
<td>2</td>
<td>5.6</td>
<td>10.5</td>
<td>63.2</td>
</tr>
<tr>
<td>Natural conditions</td>
<td>2</td>
<td>5.6</td>
<td>10.5</td>
<td>73.7</td>
</tr>
<tr>
<td>Transport</td>
<td>2</td>
<td>5.6</td>
<td>10.5</td>
<td>84.2</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>8.3</td>
<td>15.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>19</td>
<td>52.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>
The results shown that most of the respondents (44.4 %) disagree that the lack of forest road is one of the main problems with the buying of NTFPs, 30.6 % agree that lack of forest road is one of the main problems with the buying of NTFPs, 13.9 % are neutral in their opinion, 8.3 % totally agree with this statement that present one of the main problems in the buying and only 2.8 % strongly disagree with the offered statement. The results form statistical processing of data has shown that, there is statistically significant difference between disagreement and agreement of the lack of forest road as a one of the main problems in the buying of NTFPs. Therefore the null hypothesis is rejected (Chi - square test = 6.500, df = 2, p = 0.039).

The next offered statement which had to be evaluated as one of the main problems with the buying of NTFPs is the high price of NTFPs. Thinking about this statement is shared, because an equal percentage of respondents 33.3 % said they disagree and agree with this statement as a major problem with the buying of NTFPs. Also the percentage of respondents who are neutral in terms of this statement is quite high 25 %, while only 2.8 % completely disagree, completely agree and do not know whether this statement is one of the main problems with the buying of NTFPs. The results form statistical processing of data has shown that, there is statistically significant difference between disagreement and agreement of the high price of NTFPs as a one of the main problems in the buying of NTFPs. Therefore the null hypothesis is rejected (Chi - square test = 10.667, df = 3, p = 0.014).

Half of the respondents (52.8 %) disagree that the lack of buying points (centers) is one of the main problems with the buying of NTFPs, 22.2 % agree with this statement that is one of the main problems with the buying, 19.4 % strongly disagree with the given statement, and only 5.6 % were neutral in their opinions about the importance of lack of buying points (centers) as one of the main problems with the buying of NTFPs. The results form statistical processing of data has shown that, there is statistically significant difference between disagreement and agreement of the lack of buying points (centers) of NTFPs as a one of the main problems in the buying of NTFPs. Therefore the null hypothesis is rejected (Chi - square test = 26.000, df = 2, p = 0.000).

As other main problems that are identified by the respondents in this study is unfair competition, excessive state interference, the small amount of mushrooms, natural conditions, transportation and other issues such as permits, high interest rates, the manner in which the mushrooms are maintenance from their collection to buying. With all the above problems in buying of NTFPs 93.3 % from respondents fully agree and the remaining 6.7 % also agree that these problems identified by them are major problems with the buying of NTFPs. The results form statistical processing of data has shown that, there is statistically significant difference between disagreement and agreement of other problems identified by the respondents as a one of the main problems in the buying of NTFPs. Therefore the null hypothesis is rejected (Chi - square test = 11.267, df = 1, p = 0.001).

According to the survey the largest percentage of these problems occurs in unfair competition 36.8 %, then with 15.8 % followed excessive state interference, permits, high interest rates, and the manner in which the mushrooms are maintenance from their collection to buying. With 10.5 % involved other specified problems like small amount of mushrooms, natural conditions and transportation. Furthermore, the results form statistical processing of data with Chi square test has shown that, there is no statistically significant difference between equal
participation of all these specified problems in other main problems. Therefore the null hypothesis is accepted (Chi - square test = 5.947, df = 5, p = 0.311).

Furthermore capacity and percentage of capacity utilization per year of the companies for mushrooms, aromatic and medicinal plants and berries and other fruits and several main problems that companies are facing during buying NTFPs are correlated. Capacity of the company for mushrooms is negatively related to the lack of forest road as one of the main problems that companies are facing during the buying NTFPs, with a coefficient $r = - 0.408^*$ (moderate to substantial relationship) significant at level 0.028. But percentage of capacity utilization per year for mushrooms is positively related to the lack of forest road, with a coefficient $r = 0.522^*$ (substantial to very strong relationship) significant at level 0.004.

Capacity of the company for aromatic and medicinal plants is negatively related to the lack of forest road as one of the main problems that companies are facing during the buying NTFPs, with a coefficient $r = - 0.037$ (trivial relationship) significant at level 0.925. But percentage of capacity utilization per year for aromatic and medicinal plants is positively related to the lack of forest road, with a coefficient $r = 0.335$ (moderate to substantial relationship) significant at level 0.344. Capacity of the company for berries and other fruits is negatively related to the lack of forest road as one of the main problems that companies are facing during the buying NTFPs, with a coefficient $r = - 0.226$ (low to moderate relationship) significant at level 0.277. But at the same time percentage of capacity utilization per year for berries and other fruits is positively related to the lack of forest road, with a coefficient $r = 0.276$ (moderate to substantial relationship) significant at level 0.182.

Capacity of the company for mushrooms is positively related to the high price of the NTFPs as one of the main problems that companies are facing during the buying NTFPs, with a coefficient $r = 0.131$ (low to moderate relationship) significant at level 0.498. At the same time percentage of capacity utilization per year for mushrooms is positively related to the high price of the NTFPs, with a coefficient $r = 0.004$ (trivial relationship) significant at level 0.983. Capacity of the company for aromatic and medicinal plants is positively related to the high price of the NTFPs as one of the main problems that companies are facing during the buying NTFPs, with a coefficient $r = 0.018$ (trivial relationship) significant at level 0.964. But at the same time percentage of capacity utilization per year for aromatic and medicinal plants is negatively related to the high price of the NTFPs, with a coefficient $r = - 0.597$ (substantial to very strong relationship) significant at level 0.069. Capacity of the company for berries and other fruits is positively related to the high price of the NTFPs as one of the main problems that companies are facing during the buying NTFPs, with a coefficient $r = 0.295$ (low to moderate relationship) significant at level 0.152. Also percentage of capacity utilization per year for berries and other fruits is positively related to the high price of the NTFPs, with a coefficient $r = 0.188$ (low to moderate relationship) significant at level 0.368.

Capacity of the company for mushrooms is positively related to the lack of buying points as one of the main problems that companies are facing during the buying NTFPs, with a coefficient $r = 0.227$ (low to moderate relationship) significant at level 0.236. But the percentage of capacity utilization per year for mushrooms is negatively related to the lack of buying points, with a coefficient $r = - 0.297$ (low to moderate relationship) significant at level 0.118. Capacity of the company for aromatic and medicinal plants is negatively related to the lack of buying points as one of the main problems that companies are facing during the
buying NTFPs, with a coefficient $r = -0.262$ (low to moderate relationship) significant at level 0.496. At the same time the percentage of capacity utilization per year for aromatic and medicinal plants is negatively related to the lack of buying points, with a coefficient $r = -0.316$ (moderate to substantial relationship) significant at level 0.373. Capacity of the company for berries and other fruits is negatively related to the lack of buying points as one of the main problems that companies are facing during the buying NTFPs, with a coefficient $r = -0.071$ (trivial relationship) significant at level 0.737. At the same time the percentage of capacity utilization per year for berries and other fruits is also negatively related to the lack of buying points, with a coefficient $r = -0.216$ (low to moderate relationship) significant at level 0.301.

Capacity of the company and percentage of capacity utilization per year for mushrooms is not in correlation or there is no relation and dependency with other major problems that are identified by the respondents which includes unfair competition, excessive state interference, small quantity of mushrooms, natural conditions, transportation, and also permits, high interest rates, the manner of maintenance on mushrooms from their collection to buying. Capacity of the company for aromatic and medicinal plants is positively related to the other main problems indicated by respondents that companies are facing during the buying NTFPs, with a coefficient $r = 0.272$ (low to moderate relationship) significant at level 0.728. At the same time the percentage of capacity utilization per year for aromatic and medicinal plants is negatively related to the other main problems indicated by respondents that companies are facing during the buying NTFPs, with a coefficient $r = -0.272$ (trivial relationship) significant at level 0.892. At the same time the percentage of capacity utilization per year for berries and other fruits is positively related to the other main problems indicated by respondents that companies are facing during the buying NTFPs, with a coefficient $r = 0.268$ (low to moderate relationship) significant at level 0.399.

Next operations (Q19) after the buying of NTFPs covered in this research is 97.2 % selling NTFPs, 94.4 % drying NTFPs, 83.3 % processing NTFPs, 58.3 % packaging, 50 % freezing and 8.3 % other type of processing NTFPs (distillation and selection) (Tab. 14).

Table 14: Frequencies of subsequent operations after buying NTFPs

<table>
<thead>
<tr>
<th>Next operations after buying NTFPs</th>
<th>Responses</th>
<th>Percent of cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selling NTFPs</td>
<td>35</td>
<td>24.8% 97.2%</td>
</tr>
<tr>
<td>Just drying NTFPs</td>
<td>34</td>
<td>24.1% 94.4%</td>
</tr>
<tr>
<td>Brining</td>
<td>30</td>
<td>21.3% 83.3%</td>
</tr>
<tr>
<td>Freezing</td>
<td>18</td>
<td>12.8% 50.0%</td>
</tr>
<tr>
<td>Packaging</td>
<td>21</td>
<td>14.9% 58.3%</td>
</tr>
<tr>
<td>Other type of processing</td>
<td>3</td>
<td>2.1% 8.3%</td>
</tr>
<tr>
<td>Total</td>
<td>141</td>
<td>100.0% 391.7%</td>
</tr>
</tbody>
</table>
The results from statistical processing of data with Chi square test has shown that, there is no statistically significant difference between operations of companies, which followed after the buying of NTFPs. Therefore the null hypothesis of equality of all operations in companies after buying NTFPs is accept (Chi - square test = 0.064, df = 1, p = 0.801).

For the activities which are the most important for the product price (Q20) are offered several statements that respondents had to evaluate each separately and to add another statement which is according to their opinion most important activities for the product price. The stated activities with their frequency, which are the most important and which respondents had to evaluate and add others according with their opinion are given in the following table (Tab. 15).

Table 15: Most important activities for products price

<table>
<thead>
<tr>
<th>Most important activities for products price</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Buying</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unimportant</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>2.8</td>
</tr>
<tr>
<td>Neither important nor unimportant</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>8.3</td>
</tr>
<tr>
<td>Important</td>
<td>4</td>
<td>1.3</td>
<td>11.1</td>
<td>19.4</td>
</tr>
<tr>
<td>Very important</td>
<td>29</td>
<td>9.5</td>
<td>80.6</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td><strong>Transport</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unimportant</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
<td>8.3</td>
</tr>
<tr>
<td>Neither important nor unimportant</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
<td>22.2</td>
</tr>
<tr>
<td>Important</td>
<td>19</td>
<td>6.3</td>
<td>52.8</td>
<td>75.0</td>
</tr>
<tr>
<td>Very important</td>
<td>9</td>
<td>3.0</td>
<td>25.0</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td><strong>Packaging</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unimportant</td>
<td>9</td>
<td>3.0</td>
<td>25.0</td>
<td>25.0</td>
</tr>
<tr>
<td>Neither important nor unimportant</td>
<td>10</td>
<td>3.3</td>
<td>27.8</td>
<td>52.8</td>
</tr>
<tr>
<td>Important</td>
<td>14</td>
<td>4.6</td>
<td>38.9</td>
<td>91.7</td>
</tr>
<tr>
<td>Very important</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>97.2</td>
</tr>
<tr>
<td>I don’t know</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td><strong>Marketing activities</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very unimportant</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
<td>13.9</td>
</tr>
<tr>
<td>Unimportant</td>
<td>6</td>
<td>2.0</td>
<td>16.7</td>
<td>30.6</td>
</tr>
<tr>
<td>Neither important nor unimportant</td>
<td>11</td>
<td>3.6</td>
<td>30.6</td>
<td>61.1</td>
</tr>
</tbody>
</table>
Important & 12 & 3.9 & 33.3 & 94.4 \\
Very important & 2 & .7 & 5.6 & 100.0 \\
Total & 36 & 11.8 & 100.0 \\

| Other | Important & 2 & .7 & 28.6 & 28.6 \\
| | Very important & 5 & 1.6 & 71.4 & 100.0 \\
| | Total & 7 & 2.3 & 100.0 \\

| Type of other | Communication & 2 & 5.6 & 28.6 & 28.6 \\
| | Quality & 3 & 8.3 & 42.9 & 71.4 \\
| | Competition & 2 & 5.6 & 28.6 & 100.0 \\
| | Total & 7 & 19.4 & 100.0 \\

According to the answers of this question many of the respondents 80.6 % believe that buying has a very important influence on the price of the product. Then 11.1 % believe that buying is also important in establishing the price of the product, 5.6 % believe that buying is neither important nor unimportant, and only 2.8 % believe that buying is unimportant and not influence in forming the price of the product. The results from statistical processing of data with Chi square test have shown that, there is statistically significant difference between important or unimportant of buying over the establishment the price of the product. Hence, the null hypothesis is rejected (Chi - square test = 55.167, df = 2, p = 0.000).

More than half of respondents 52.8 % believe that transport has an important influence on the establishment of product price, 25 % believe that this influence is very important, 13.9 % think that is neither important nor unimportant and 8.3 % think the influence of transport on the formation of the price of product is unimportant. The results from statistical processing of data with Chi square test have shown that, there is statistically significant difference between important or unimportant of transport over the establishment the price of the product. Hence, the null hypothesis is rejected (Chi - square test = 55.167, df = 2, p = 0.000).

Packaging as an activity which has influenced the price of the product is considered an important 38.9 % of respondents, 27.8 % believe that packaging is neither important nor unimportant, has no any particular role in price formation, 25 % think that the packaging is unimportant in the formation of product price, 5.6 % believe that packaging is very important and 2.8 % said they did not know how packaging affects the formation of price. The results from statistical processing of data with Chi square test have shown that, there is statistically significant difference between important or unimportant of packaging on the establishment price of the product. Hence, the null hypothesis is rejected (Chi - square test = 12.667, df = 3, p = 0.005).

According to opinion of respondents in this research the impact of marketing activities have an important influence in formation of the price of the product 33.3 %, smaller percentage of 30.6 % consider the impact of marketing activities are neither important nor unimportant, 16.7 % think that marketing activities are unimportant in influencing the formation of product.
price, 13.9 % of respondents think that they are very unimportant and only 5.6 % believe that marketing activities are very important and affect the price of the product. The results from statistical processing of data with Chi square test have shown that, there is no statistically significant difference between important or unimportant of marketing activities on the establishment the price of the product. Hence, the null hypothesis is accepted, i.e. marketing activities does not have influence in establishment the price of the product (Chi - square test = 0.500, df = 2, p = 0.779).

Other activities that are specified by respondents are communicating with customers, product quality and competition. According to respondents these activities have a very important influence in forming the price of the product 71.4 % and the remaining 28.6 % also believe that these activities have an important influence in forming the price of the product. The results from statistical processing of data with Chi square test have shown that, there is no statistically significant difference between important or very important of other activities (communicating with customers, product quality and competition) over the establishment the price of the product. Hence, the null hypothesis is accepted (Chi - square test = 1.286, df = 1, p = 0.257).

The largest percentage of these activities has product quality, which affect the price of the product with 42.9 % and the remaining two activities, communicating with consumers and competition contribute with 28.6 %. The results from statistical processing of data with Chi square test have shown that, there is no statistically significant difference between equally influence on communicating with customers, product quality and competition over the establishment the price of the product. Hence, the null hypothesis is accepted (Chi - square test = 1.286, df = 1, p = 0.257).

Further is presented companies equipment which they possess at the time when the survey was conducted. All companies have weighing machine 100 %, then 86.1 % have a machine for processing NTFPs, 83.3 % of companies have a drying machine, 75 % have other equipment that companies own (Tab. 16).

Table 16: Companies equipment frequencies

<table>
<thead>
<tr>
<th>List of equipment that company have - Frequencies</th>
<th>Responses</th>
<th>Percent of cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Van with refrigerator</td>
<td>16</td>
<td>9.0%</td>
</tr>
<tr>
<td>Van without refrigerator</td>
<td>26</td>
<td>14.6%</td>
</tr>
<tr>
<td>Weighing machine</td>
<td>36</td>
<td>20.2%</td>
</tr>
<tr>
<td>Drying machine</td>
<td>30</td>
<td>16.9%</td>
</tr>
<tr>
<td>Machine for processing NTFPs</td>
<td>31</td>
<td>17.4%</td>
</tr>
<tr>
<td>Packaging machine</td>
<td>12</td>
<td>6.7%</td>
</tr>
<tr>
<td>Other</td>
<td>27</td>
<td>15.2%</td>
</tr>
<tr>
<td>Total</td>
<td>178</td>
<td>100.0%</td>
</tr>
</tbody>
</table>
From other equipment that companies own, the highest percentage (47.2 %) have refrigerator, refrigerated truck and freezing chamber, then 13.9 % of tunnels and chambers, 8.3 % of trucks, sewing sacks machine, baling press, 5.6 % of the color selector, selector for size, automobile, pickup car and natural dryers and 2.8 % of the machine for determining moisture and furnaces for heat treatment. After that follows van without refrigerator 72.2 %, van with refrigerator 44.4 % and 33.3 % have a machine for packing NTFPs (Tab. 17).

Table 17: Other equipment frequency

<table>
<thead>
<tr>
<th>Other equipment frequency</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refrigerator, refrigerated</td>
<td>17</td>
<td>47.2</td>
<td>47.2</td>
<td>47.2</td>
</tr>
<tr>
<td>Tunnels, chambers</td>
<td>5</td>
<td>13.9</td>
<td>13.9</td>
<td>61.1</td>
</tr>
<tr>
<td>Natural dryers</td>
<td>2</td>
<td>5.6</td>
<td>5.6</td>
<td>66.7</td>
</tr>
<tr>
<td>Sewing sacks machine, baling</td>
<td>3</td>
<td>8.3</td>
<td>8.3</td>
<td>75.0</td>
</tr>
<tr>
<td>Colour selector, selector for</td>
<td>2</td>
<td>5.6</td>
<td>5.6</td>
<td>80.6</td>
</tr>
<tr>
<td>Machine for determining</td>
<td>1</td>
<td>2.8</td>
<td>2.8</td>
<td>83.3</td>
</tr>
<tr>
<td>Trucks</td>
<td>3</td>
<td>8.3</td>
<td>8.3</td>
<td>91.7</td>
</tr>
<tr>
<td>Automobile, pickup car</td>
<td>2</td>
<td>5.6</td>
<td>5.6</td>
<td>97.2</td>
</tr>
<tr>
<td>Furnaces for heat treatment</td>
<td>1</td>
<td>2.8</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

The results from statistical processing of data with Chi square test have shown that there is statistically significant difference between equipment which companies have. Therefore the null hypothesis of equal representation of the equipment is rejected (Chi - square test = 17.135, df = 6, p = 0.009). Also the results shown there is statistically significant difference between other equipment which companies have, therefore also the null hypothesis of equality presence of other equipment is rejected (Chi - square test = 50.500, df = 8, p = 0.000).

In companies work so far (Q30), most of the companies (58.3 %) offered training course for pickers, 41.7 % have never offered any training course for pickers of NTFPs. The results from statistical processing of data have shown that percentage of offered training course for collectors by the companies don’t statistically significant differ than percentage of never offered any training course, hence the null hypothesis of equal offered training course for collectors by companies is accepted (Chi - square test = 1.000, df = 1, p = 0.317). On offered courses by companies participated at least 10, maximum 1500, while the average number of participants on these courses was 121 collectors. The number of 120 pickers which participated on offered training course organized by companies was assumed. According to one simple t test results with null hypothesis that number of pickers which participated on trainings differ statistically significant from 120 participants, i.e. we can say that this number of pickers which participated on training courses was around 120 people (t = 0.017, p = 0.986). The purpose of organizing training courses were training for sustainable manner on collection of NTFPs, sustainable management with NTFPs, education about protection of
NTFPs, how to get better quality from NTFPs, how to pick, store and carry up of NTFPs till the buying (Tab. 18).

Table 18: Training courses for pickers

<table>
<thead>
<tr>
<th></th>
<th>Min.</th>
<th>Max.</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training courses for pickers</td>
<td>10</td>
<td>1500</td>
<td>121.19</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Valid percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>21</td>
<td>58.3</td>
</tr>
<tr>
<td>No</td>
<td>15</td>
<td>41.7</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>100.0</td>
</tr>
</tbody>
</table>

\[(t = 0.017, p = 0.986)\]

Furthermore there is present correlation between capacity and percentage of capacity utilization per year of the companies for mushrooms, aromatic and medicinal plants and berries and other fruits and offered training courses for the pickers. Capacity of the company for mushrooms is negatively related to the training course that companies offered to the pickers, with a coefficient \( r = -0.124 \) (low to moderate relationship) significant at level 0.522. But the percentage of capacity utilization per year for mushrooms is positively related to the training course that companies offered to the pickers, with a coefficient \( r = 0.538^* \) (substantial to very strong relationship) significant at level 0.003. Capacity of the company for aromatic and medicinal plants is negatively related to the training course that companies offered to the pickers, with a coefficient \( r = -0.414 \) (moderate to substantial relationship) significant at level 0.268. But the percentage of capacity utilization per year for aromatic and medicinal plants is positively related to the training course that companies offered to the pickers, with a coefficient \( r = 0.468 \) (moderate to substantial relationship) significant at level 0.172. Capacity of the company for berries and other fruits is negatively related to the training course that companies offered to the pickers, with a coefficient \( r = -0.157 \) (low to moderate relationship) significant at level 0.454. But the percentage of capacity utilization per year for berries and other fruits is positively related to the training course that companies offered to the pickers, with a coefficient \( r = 0.371 \) (moderate to substantial relationship) significant at level 0.067.

From the descriptive statistics (Q31) can be concluded that the average capacity of companies for mushrooms was 259 883 kg, for aromatic and medicinal herbs 268 800 kg and for berries and other fruits 129 516 kg. Furthermore the mean percentage of capacity utilization of companies was 48.62 % for mushrooms, 50.90 % for aromatic and medicinal herbs and 56.80 % for berries and other fruits. The 50 % of capacity utilization of companies for each product was assumed. According to one simple t test results with null hypothesis that the utilization capacity of the companies from the sample for each product differs statistically significant from 50 %, failed, i.e. we can say that for each product percentage of capacity utilization of the companies is around 50 % (Tab. 19).
Market potential for non–timber forest products in the Republic of Macedonia

Table 19: Capacity of the companies

<table>
<thead>
<tr>
<th>Capacity of the companies and percentage of capacities utilization per year</th>
<th>No.</th>
<th>Min.</th>
<th>Max.</th>
<th>Sum</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms – average capacity (kg)</td>
<td>29</td>
<td>3300</td>
<td>1000000</td>
<td>7536600</td>
<td>259882.76</td>
</tr>
<tr>
<td>Mushrooms – average percent of utilization</td>
<td>29</td>
<td>10</td>
<td>100</td>
<td>1410</td>
<td>48.62</td>
</tr>
<tr>
<td>(t = - 0.241, p = 0.811)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aromatic and medicinal herbs – average capacity (kg)</td>
<td>9</td>
<td>700</td>
<td>800000</td>
<td>2419200</td>
<td>268800.00</td>
</tr>
<tr>
<td>Aromatic and medicinal herbs – average percent of utilization</td>
<td>10</td>
<td>10</td>
<td>100</td>
<td>509</td>
<td>50.90</td>
</tr>
<tr>
<td>(t = 0.076, p = 0.941)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berries and other fruits – average capacity (kg)</td>
<td>25</td>
<td>1000</td>
<td>500000</td>
<td>3237900</td>
<td>129516.00</td>
</tr>
<tr>
<td>Berries and other fruits – average percent of utilization</td>
<td>25</td>
<td>10</td>
<td>100</td>
<td>1420</td>
<td>56.80</td>
</tr>
<tr>
<td>(t = 1.231, p = 0.230)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The main problem in business by the respondents (Q32) in the first place is unfair competition with 86.1 %, with same percentage share 41.7 % followed by insufficient manpower and payment, 30.6 % think that the main problem is the unskilled labor force, 27.8 % think there is underdeveloped domestic market, 22.2 % said that there is a lack of the training course of collectors, 16.7 % think that there is a lack of exports, 11.1 % said that there are not efficient use of facilities and other equally percent 8.3 % is allocated to customers as a major problems in business, then cooperation with other companies and other problems which are mentioned like long process of transaction of money (66.7 %) and dictate prices (33.3 %) (Tab. 20).
Table 20: Main problems in business

<table>
<thead>
<tr>
<th>Main problems in business - Frequencies</th>
<th>Responses</th>
<th>Percent of cases</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td></td>
</tr>
<tr>
<td>Unqualified labour</td>
<td>11</td>
<td>10.1%</td>
</tr>
<tr>
<td>Insufficient labour</td>
<td>15</td>
<td>13.8%</td>
</tr>
<tr>
<td>Lack of trainings</td>
<td>8</td>
<td>7.3%</td>
</tr>
<tr>
<td>Unfair competition</td>
<td>31</td>
<td>28.4%</td>
</tr>
<tr>
<td>Lack of export</td>
<td>6</td>
<td>5.5%</td>
</tr>
<tr>
<td>Undeveloped national market</td>
<td>10</td>
<td>9.2%</td>
</tr>
<tr>
<td>Non efficient utilization of the capacities</td>
<td>4</td>
<td>3.7%</td>
</tr>
<tr>
<td>Payments</td>
<td>15</td>
<td>13.8%</td>
</tr>
<tr>
<td>Clients</td>
<td>3</td>
<td>2.8%</td>
</tr>
<tr>
<td>Cooperation with other enterprises</td>
<td>3</td>
<td>2.8%</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>2.8%</td>
</tr>
<tr>
<td>Total</td>
<td>109</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

(Chi - square test = 1.550, df = 1, p = 0.213)

The results from statistical processing of data with Chi – square test shown that, there is statistically significant difference between unfair competition, insufficient labor and payment with the rest of problems in business. Therefore the null hypothesis is accepted and above mentions three main problems are statistically differ from the rest main problems (Chi - square test = 1.550, df = 1, p = 0.213). Although the results shown that there is statistically significant difference between the long process of transaction of money and dictate prices. The null hypothesis is accepted (Chi - square test = 0.333, df = 1, p = 0.564) (Tab. 21).

Table 21: Other problems

<table>
<thead>
<tr>
<th>Other problems</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process of transaction of money</td>
<td>2</td>
<td>1.8</td>
<td>66.7</td>
<td>66.7</td>
</tr>
<tr>
<td>Dictate the price</td>
<td>1</td>
<td>.9</td>
<td>33.3</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>3</td>
<td>2.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Chi - square test = 0.333, df = 1, p = 0.564)

Business environment of companies is represented by several statements that should be evaluated as important or unimportant for the companies (Tab. 22). The answers (Q33) show that 44.4 % of respondents strongly disagree that they have old equipment and machinery,
25% also disagree, 22.2% agree that they have old equipment and machinery and 8.3% have a neutral opinion its equipment and machinery. The results from statistical processing of data shown that there is not statistically significant difference between disagreement with the possession of old equipment and machinery and agreement with that condition. The null hypothesis is rejected. Therefore the results indicate that disagreement with having old equipment and machinery significantly differ from hypothesized value of 50%. (Binomial test, \(p = 0.005\)).

The existence of unfair competition as one of the working conditions strongly agree 61.1% of respondents, 19.4% agree that there is unfair competition in the market, 11.1% are neutral in their opinion and 8.3% disagree that there is unfair competition as one of working conditions of companies in the market. The results from statistical processing of data show that there is not statistically significant difference between agreement with unfair competition and disagreement with that condition. The null hypothesis is rejected. Therefore the results indicate that agreement with unfair competition significantly differ from hypothesized value of 50% (Binomial test, \(p = 0.000\)).

With the existence of inadequate legal framework (permits and licenses) in NTFPs sector agree 61.1% of respondents, 30.6% strongly agree that there is inadequate legal framework, 5.6% disagree with this statement and 2.8% were neutral in their opinion. The results from statistical processing of data show that there is not statistically significant difference between agreement with the existence of inadequate legal framework (permits and licenses) and disagreement with that condition. The null hypothesis is rejected. Therefore the results indicate that disagreement with the existence of inadequate legal framework (permits and licenses) significantly differ from hypothesized value of 50% (Binomial test, \(p = 0.000\)).

Table 22: Business environment

<table>
<thead>
<tr>
<th>Business environment</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old equipment and mechanization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agree</td>
<td>8</td>
<td>2.6</td>
<td>22.2</td>
<td>22.2</td>
</tr>
<tr>
<td>Neutral</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
<td>30.6</td>
</tr>
<tr>
<td>Disagree</td>
<td>9</td>
<td>3.0</td>
<td>25.0</td>
<td>55.6</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>16</td>
<td>5.3</td>
<td>44.4</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, \(p = 0.005\))

<table>
<thead>
<tr>
<th>Unfair competition</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disagree</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
<td>8.3</td>
</tr>
<tr>
<td>Neutral</td>
<td>4</td>
<td>1.3</td>
<td>11.1</td>
<td>19.4</td>
</tr>
<tr>
<td>Agree</td>
<td>7</td>
<td>2.3</td>
<td>19.4</td>
<td>38.9</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>22</td>
<td>7.2</td>
<td>61.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, \(p = 0.000\))
Market potential for non–timber forest products in the Republic of Macedonia

Vaska Nedanovská

Inadequate legal framework (permissions and licences)

<table>
<thead>
<tr>
<th></th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly agree</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Disagree</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>5.6</td>
<td></td>
</tr>
<tr>
<td>Neutral</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>8.3</td>
<td></td>
</tr>
<tr>
<td>Agree</td>
<td>22</td>
<td>7.2</td>
<td>61.1</td>
<td>69.4</td>
<td></td>
</tr>
<tr>
<td>Strongly agree</td>
<td>11</td>
<td>3.6</td>
<td>30.6</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, p = 0.000)

Capacity and percentage of capacity utilization per year of the companies for mushrooms, aromatic and medicinal plants and berries and other fruits and business environment of the companies, where are listed following statements: old equipment and mechanization, unfair competition and inadequate legal framework (permissions and licences) are correlated.

Capacity of the company for mushrooms is negatively related to the old equipment and mechanization as one of the working conditions in companies, with a coefficient $r = -0.050$ (trivial relationship) significant at level 0.796. At the same time the percentage of capacity utilization per year for mushrooms is also negatively related to the old equipment and mechanization, with a coefficient $r = -0.245$ (low to moderate relationship) significant at level 0.200. Capacity of the company for aromatic and medicinal plants is negatively related to the old equipment and mechanization as one of the working conditions in companies, with a coefficient $r = -0.533$ (substantial to very strong relationship) significant at level 0.140. At the same time the percentage of capacity utilization per year for aromatic and medicinal plants is also negatively related to the old equipment and mechanization, with a coefficient $r = -0.229$ (low to moderate relationship) significant at level 0.525. Capacity of the company for berries and other fruits is positively related to the old equipment and mechanization as one of the working conditions in companies, with a coefficient $r = 0.127$ (low to moderate relationship) significant at level 0.545. But the percentage of capacity utilization per year for berries and other fruits is negatively related to the old equipment and mechanization, with a coefficient $r = -0.169$ (low to moderate relationship) significant at level 0.419.

Capacity of the company for mushrooms is negatively related to the unfair competition as one of the working conditions in companies, with a coefficient $r = -0.128$ (low to moderate relationship) significant at level 0.508. At the same time the percentage of capacity utilization per year for mushrooms is also negatively related to the unfair competition, with a coefficient $r = -0.100$ (low to moderate relationship) significant at level 0.605. Capacity of the company for aromatic and medicinal plants is negatively related to the unfair competition as one of the working conditions in companies, with a coefficient $r = -0.098$ (trivial relationship) significant at level 0.801. At the same time the percentage of capacity utilization per year for aromatic and medicinal plants is also negatively related to the unfair competition, with a coefficient $r = -0.423$ (moderate to substantial relationship) significant at level 0.223. Capacity of the company for berries and other fruits is negatively related to the unfair competition as one of the working conditions in companies, with a coefficient $r = -0.023$ (trivial relationship) significant at level 0.914. At the same time the percentage of capacity utilization per year for berries and other fruits is also negatively related to the unfair competition, with a coefficient $r = -0.239$ (low to moderate relationship) significant at level 0.419.
utilization per year for berries and other fruits is also negatively related to the unfair competition, with a coefficient $r = -0.235$ (low to moderate relationship) significant at level 0.259.

Capacity of the company for mushrooms is positively related to the inadequate legal framework (permissions and licences) as one of the working conditions in companies, with a coefficient $r = 0.060$ (trivial relationship) significant at level 0.759. At the same time the percentage of capacity utilization per year for mushrooms is positively related to the inadequate legal framework (permissions and licences), with a coefficient $r = 0.072$ (trivial relationship) significant at level 0.709. Capacity of the company for aromatic and medicinal plants is positively related to the inadequate legal framework (permissions and licences) as one of the working conditions in companies, with a coefficient $r = 0.414$ (moderate to substantial relationship) significant at level 0.268. But the percentage of capacity utilization per year for aromatic and medicinal plants is negatively related to the inadequate legal framework (permissions and licences), with a coefficient $r = -0.468$ (moderate to substantial relationship) significant at level 0.172. Capacity of the company for berries and other fruits is positively related to the inadequate legal framework (permissions and licences) as one of the working conditions in companies, with a coefficient $r = 0.047$ (trivial relationship) significant at level 0.825. At the same time the percentage of capacity utilization per year for berries and other fruits is also positively related to the inadequate legal framework (permissions and licences), with a coefficient $r = 0.176$ (trivial relationship) significant at level 0.399.

### 4.2.4. Selling and trading NTFPs (Q22 – Q24)

Half of the companies that are subject to this research have export of NTFPs and the rest of half of the companies are not exporting NTFPs (Q22).

The total annual quantity of mushrooms that are exported is 2 258 000 kg per year and 74 %, or 1 677 000 kg per year in Italy, followed by France with a total annual quantity of 240 350 kg per year or 11 % of the total export of mushrooms. Another country where per quantity are exported mushroom is Germany with a total annual quantity of 155 650 kg per year or 7 % of the total export of mushrooms. Certain amount of mushrooms 100 000 kg per year (4 %) is exported to Australia and the rest 85 000 kg per year (4 %) is exported to other European countries (Switzerland, Slovenia, Spain, Netherlands) and Serbia also.

The total annual quantity of aromatic and medicinal herbs that is exported 3 450 000 kg per year and 29 % or 1 000 000 kg in the USA, 24 % or 835 000 kg per year in countries of former Yugoslavia, 23 % or 800 000 kg per year exported to Russia, 7 % or 240 000 kg annually exported to France, and the remaining quantity of 575 000 kg per year (17 %) are exported to European countries (Italy, Germany, Bulgaria, Switzerland).

The total annual quantity of berries and other fruits which is exported 1 506 000 kg per year and 42 % or 629 000 kg per year is exported to Italy. Then follows Germany with 530 000 kg per year or 35 % and Serbia with 326 000 kg or 22 % annual exports of berries and other fruits. The remaining part is very low, at only 21 000 kg per year (1 %) of the total quantity of harvested blueberries and other berries are exported to Poland and Sweden.
The total annual quantity of other non wood forest products which often includes juniper, rosehips and blackberries which is exported 920 000 kg per year. Most of this quantity 490 000 or 53 % are exported to Germany, followed by Italy with 290 000 kg per year or 32 % of the total quantity of other non wood forest products are exported and the rest of 140 000 kg per year or 15 % exported to Serbia, Sweden, Poland (Tab. 23).

Table 23: Total annual quantity of products for export

<table>
<thead>
<tr>
<th>Annual export quantities of products</th>
<th>No.</th>
<th>Min.</th>
<th>Max.</th>
<th>Sum</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>33</td>
<td>350</td>
<td>400000</td>
<td>2258000</td>
<td>68424.24</td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td>14</td>
<td>5000</td>
<td>100000</td>
<td>3450000</td>
<td>246428.57</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>16</td>
<td>1000</td>
<td>50000</td>
<td>1506000</td>
<td>94125.00</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
<td>3000</td>
<td>200000</td>
<td>920000</td>
<td>92000.00</td>
</tr>
</tbody>
</table>

From results for export of mushrooms obtained with the Chi - square test can be concluding that export is not uniform in all countries. Therefore the null hypothesis has to be reject, or export of mushrooms is significantly differ by countries (Chi - square test = 13.515, df = 4, p = 0.009).

Countries where are mostly exported mushrooms are Italy, France and Germany. The results from statistical processing of data have shown that there is statistically significant difference between exports of mushrooms in Italy, France and Germany and the other countries. Therefore the null hypothesis of equal export of mushrooms was rejected (Chi-square test = 8.758, df = 1, p = 0.003).

The results obtained with the Chi - square test for export of aromatic and medicinal herbs can be concluded that export is uniform in all countries. So, there is no statistically significant differences in which country are exported aromatic and medicinal herbs. Therefore the null hypothesis has to be accepted, or export of aromatic and medicinal herbs is not significantly differ by countries (Chi - square test = 8.857, df = 4, p = 0.065).

The results obtained with the Chi - square test shown that export of berries and other fruits is uniform in all countries. Furthermore can be concluded that, there is no statistically significant differences in which countries are exported berries and other fruits. Therefore the null hypothesis has to be accepted, or export of berries and other fruits is not significantly differ by countries (Chi - square test = 1.500, df = 3, p = 0.682).

The results obtained with the Chi - square test shown that export of other NTFPs is uniform in all countries. Furthermore can be concluded that, there is no statistically significant differences in which countries are exported other NTFPs. Therefore the null hypothesis has to be accepted, or export of other NTFPs is not significantly differ by countries (Chi - square test = 0.200, df = 2, p = 0.905).

Most of the buying products, companies are selling to other processors in the country (58.3 %) and exported to the international markets (55.6 %). The remaining small part is sold in own shops (8.3 %) and retail (5.6 %) (Q23) (Tab. 24).
Table 24: Selling products

<table>
<thead>
<tr>
<th>To whom selling your products</th>
<th>Frequencies</th>
<th>Responses</th>
<th>Percent of cases</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>Percent</td>
<td></td>
</tr>
<tr>
<td>Own shops</td>
<td>3</td>
<td>6.5%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Shops owners (retail)</td>
<td>2</td>
<td>4.3%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Export</td>
<td>20</td>
<td>43.5%</td>
<td>55.6%</td>
</tr>
<tr>
<td>Other processors</td>
<td>21</td>
<td>45.7%</td>
<td>58.3%</td>
</tr>
<tr>
<td>Total</td>
<td>46</td>
<td>100.0%</td>
<td>127.8%</td>
</tr>
</tbody>
</table>

From the processing results with the Chi - square test can be concluded that there is no statistically significant difference where they are selling products and to whom. Therefore the null hypothesis of equally selling products in their own stores, retail supermarkets in the country, and exports to other producers is rejected. Most of the products they are sold to other manufacturers and exported to world markets which has been shown statistically significant (Chi - square test = 28.174, df = 1 p = 0.000).

Stability on the market of NTFPs at the moment (Q24), 44.4 % of respondents assessed like not stable, 27.8 % think that the market is quite stable, 16.7 % believe that the market is not stable at all and 11.1 % think that the market for NTFPs is stable at the moment. The results from statistical processing of data with Chi square test have shown that, there is statistically significant difference between question options, i.e. stable or not stable option for market of NTFPs. Therefore the null hypothesis is rejected, stability of the market significantly differ from the hypothesis that we supplied (Chi - square test = 9.333, df = 3, p = 0.025) (Tab. 25).

Table 25: Stability on the market

<table>
<thead>
<tr>
<th>Stability on the market of NTFPs at the moment</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not stable at all</td>
<td>6</td>
<td>2.0</td>
<td>16.7</td>
<td>16.7</td>
</tr>
<tr>
<td>Not stable</td>
<td>16</td>
<td>5.3</td>
<td>44.4</td>
<td>61.1</td>
</tr>
<tr>
<td>Quite stable</td>
<td>10</td>
<td>3.3</td>
<td>27.8</td>
<td>88.9</td>
</tr>
<tr>
<td>Stable</td>
<td>4</td>
<td>1.3</td>
<td>11.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Chi - square test = 9.333, df = 3, p = 0.025)
4.2.5. Marketing tools (Q25 – Q29)

Furthermore is an assessment on importance of marketing tools in NTFPs sector (Q25). According to the respondents, 47.2 % believe that the developed channels of distribution are very important as a marketing activity in this sector, then 38.9 % think they are important for the marketing of this sector, 8.3 % considered that developed channels of distribution are unimportant, and only 2.8 % think that the developed distribution channels are unimportant at all and the same percent of respondents 2.8 % have a neutral opinion on their validity. The results from statistical processing of data indicate that there is statistically significant difference between question options, i.e. important or unimportant option. In other words, the opinion for the importance of developed channels of distribution is positive (Binomial test, p = 0.000).

Next marketing tool that was offered to evaluate is familiar product/name (brand) of which 38.9 % of respondents stated that it is important for the marketing of this sector, 30.6 % believe that this marketing tool is very important for this sector, 16.7 % of respondents think that the familiar product/name (brand) as a marketing tool is unimportant for NTFPs sector, 8.3 % abstained on the importance of this marketing tool and 2.8 % think that this marketing tool is unimportant at all for NTFPs sector and the same percentage do not know about the importance of familiar product/name (brand) as a marketing tool for the sector. The results from statistical processing of data show that there is statistically significant difference between question options, i.e. important or unimportant option. In other words, the opinion for the importance of familiar product/name (brand) is positive (Binomial test, p = 0.002).

Advertising as a marketing tool in NTFPs sector is considered an important 47.2 % of respondents, then 30.6 % think that advertising is unimportant for the marketing of this sector, 11.1 % believe that it is unimportant at all for promoting of this sector, 8.3 % think that advertising as a marketing tool is very important and only 2.8 % were neutral in their opinions. In contrast to the previous two marketing tools, the results from statistical processing of data indicate that there is no statistically significant difference between question options, i.e. important or unimportant option. In other words, the opinion for the importance of advertising is neither positive nor negative (Binomial test, p = 0.500) (Tab. 26).

Table 26: Importance of marketing tools

<table>
<thead>
<tr>
<th>Importance of the marketing tools</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developed channels of distribution</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unimportant at all</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>2.8</td>
</tr>
<tr>
<td>Unimportant</td>
<td>29</td>
<td>9.5</td>
<td>80.6</td>
<td>100.0</td>
</tr>
<tr>
<td>Neutral</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>8.3</td>
</tr>
<tr>
<td>Important</td>
<td>4</td>
<td>1.3</td>
<td>11.1</td>
<td>19.4</td>
</tr>
<tr>
<td>Very important</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The use of marketing tools is evaluated through the answers given on this issue (Q26). According to the respondents 69.4 % said that never during their work did not use PR to promote their company. A small percentage of respondents 13.9 % used a PR a few times a year, 11.1 % once a year and a very small percentage 2.8 % used it often and very often PR activities to promote and familiarize with the activities of their company. The results from statistical processed data, has shown that most of the companies have never used PR activities since they are working. This was found statistically significant using Chi – square test with the null hypothesis of equality of using PR during the year which was rejected (Chi - square test = 5.444, df = 1, p = 0.020).

Next marketing tool which were asked respondents is use of advertising during the year. According to their response which is repeated in whole with the previous marketing tool, 66.7 % from respondents never used advertising in the year to promote their products and company itself. 16.7 % said they used advertising several times a year, 13.9 % said that once per year use advertising and only 2.8 % said they very often use advertising as a marketing tool. Also during statistical processing of data we assumed that most of the companies have never used advertising. The test result proved the assumption. Chi square test was used, with null hypothesis of equality of percentage of the companies that are using advertising and
percentage of companies that have never used advertising during the year, which was rejected (Chi - square test = 4.000, df = 1, p = 0.046).

The most remarkable not usage of marketing tools can be recognized in branding products whereas 88.9 % said they never use branding. A very small percentage of respondents 5.6 % said they very often use branding and only 2.8 % responded that once a year and several times a year using branding as a marketing tool. The results from statistical processed data, has shown that most of the companies have never used branding since they are working. This was found statistically significant using Chi – square test with the null hypothesis of equality of using branding during the year which was rejected (Chi - square test = 21.778, df = 1, p = 0.000) (Tab. 27).

Table 27: Used of marketing tools

<table>
<thead>
<tr>
<th>Used of marketing tools</th>
<th>Frequency</th>
<th>%</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PR</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Never</td>
<td>25</td>
<td>8.2</td>
<td>69.4</td>
<td>69.4</td>
</tr>
<tr>
<td>Once in year</td>
<td>4</td>
<td>1.3</td>
<td>11.1</td>
<td>80.6</td>
</tr>
<tr>
<td>Few time per year</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
<td>94.4</td>
</tr>
<tr>
<td>Often</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>97.2</td>
</tr>
<tr>
<td>Very often</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Chi - square test = 5.444, df = 1, p = 0.020)

| **Advertising**         |           |    |               |                    |
| Never                   | 24        | 7.9| 66.7          | 66.7               |
| Once in year            | 5         | 1.6| 13.9          | 80.6               |
| Few time per year       | 6         | 2.0| 16.7          | 97.2               |
| Very often              | 1         | .3 | 2.8           | 100.0              |
| **Total**               | 36        | 11.8| 100.0        |                    |

(Chi - square test = 5.444, df = 1, p = 0.046)

| **Branding**            |           |    |               |                    |
| Never                   | 32        | 10.5| 88.9          | 88.9               |
| Once in year            | 1         | .3 | 2.8           | 91.7               |
| Few time per year       | 1         | .3 | 2.8           | 94.4               |
| Very often              | 2         | .7 | 5.6           | 100.0              |
| **Total**               | 36        | 11.8| 100.0        |                    |

(Chi - square test = 5.444, df = 1, p = 0.000)
Marketing tool which is the most successful, 25.5 % answered that advertising is considered like the most successful marketing tool, followed by branding with 19.6 % (Q27). Equal percentage 15.7 % believe that both PR and developed channels of distribution are the most successful marketing tools, 13.7 % said that quality, direct communication with consumers and internet services are most successful as a marketing tool and 9.8 % believe that promotion is the most successful marketing tool, but they do not have specify on what kind of promotion refers their opinion. The results from statistical processing of the data have shown that advertising and branding marketing tools, although have the highest percentages, don’t statistically significant differ than other marketing tools, hence the null hypothesis of equal participation of all most successful marketing tools is accepted (Chi - square test = 0.490, df = 1, p = 0.484) (Tab. 28).

Table 28: Most successful marketing tools

<table>
<thead>
<tr>
<th>Most successful marketing tools</th>
<th>Frequency</th>
<th>%</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>PR</td>
<td>8</td>
<td>15.7</td>
<td>15.7</td>
<td>15.7</td>
</tr>
<tr>
<td>Advertising</td>
<td>13</td>
<td>25.5</td>
<td>25.5</td>
<td>41.2</td>
</tr>
<tr>
<td>Distribution channels</td>
<td>8</td>
<td>15.7</td>
<td>15.7</td>
<td>56.9</td>
</tr>
<tr>
<td>Branding</td>
<td>10</td>
<td>19.6</td>
<td>19.6</td>
<td>76.5</td>
</tr>
<tr>
<td>Promotion</td>
<td>5</td>
<td>9.8</td>
<td>9.8</td>
<td>86.3</td>
</tr>
<tr>
<td>Other (quality, internet, direct communication)</td>
<td>7</td>
<td>13.7</td>
<td>13.7</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>51</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Chi - square test = 0.490, df = 1, p = 0.484)

The majority of respondents (25.6 %) believe that successful marketing tools are most used to promote companies, their products and the quality of the products of companies (Q28). The same percentage of respondents thinks that marketing tools are also success for better sales of quality products. Next reasons with the same percentage of response (14 %) why marketing tools are considered successful are better communication and cooperation as between companies and with consumers at the same time, and reliable buyers and growing number of consumers. Then are coming reasons that are grouped into one group for easier statistical processing of data. In that group which percentage share is 9.3 % of total opinions why marketing tool are successful include better marketing of products, familiarization with working conditions, needs and requirements as the market itself and in the sector and certainly better, more efficient distribution of material goods. Next reason stated by respondents participating with 7 % in their overall opinion is to increase production, profits, profitability and efficiency of the company. Finally with 4.7 % in the opinion of respondents
coming more trust and norms of behavior in the business in NTFPs sector. Statistical processing of the data have shown that reasons for success of marketing tools with highest percentage (promotion of company, products, quality, better sales of quality products) don’t statistically significant differ than other reason for success of the marketing tools, hence the null hypothesis of equal participation of all reasons is accepted (Chi - square test = 0.023, df = 1, p = 0.879) (Tab. 29).

Table 29: Reasons for successful marketing tools

| Reasons why marketing tools is most successful                              | Frequency | %     | Valid Percent | Cumulative Percent |
|==========================================================================|-----------|-------|---------------|--------------------|
| Promotion of company, products, quality                                  | 11        | 21.6  | 25.6          | 25.6               |
| Communication and cooperation                                            | 6         | 11.8  | 14.0          | 39.5               |
| Better sales of products, quality products                                | 11        | 21.6  | 25.6          | 65.1               |
| Reliable buyer, more customers                                           | 6         | 11.8  | 14.0          | 79.1               |
| Increase production, higher profit, greater profitability and efficiency  | 3         | 5.9   | 7.0           | 86.0               |
| Greater trust and norms of behaviour                                     | 2         | 3.9   | 4.7           | 90.7               |
| Other (better marketing of the products, familiar with working conditions, better disposal of goods, familiarization the needs of the market) | 4         | 7.8   | 9.3           | 100.0              |
| **Total**                                                                | **43**    | **84.3** | **100.0**    |                    |

(Chi - square test = 0.023, df = 1, p = 0.879)

Large percentage of the companies 94.4 % have web - site and e - mail address, while only 5.6 % answer that do not have (Q29). Due to oversight during the design of this question, as demonstrated by the research itself, can be put a note that the confirmation response is certainly refers to the existence of e - mail addresses of companies, but cannot with certainty be said that all companies have web - side. So some companies have just e - mail addresses. The results from statistical processing of data indicate that, there is statistically significant difference in positive and negative answer of the existence of web side and e - mail address in the research. The null hypothesis is rejected. In other words, the proportion of negative answer given from the respondents that they don’t have web side and e - mail address in this research is significantly differ from the hypothesized value of 50 % (Binominal test, p = 0.000) (Tab. 30).
Table 30: Web side and e-mail address

<table>
<thead>
<tr>
<th>Web side and e-mail address</th>
<th>Frequency</th>
<th>%</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>34</td>
<td>11.2</td>
<td>94.4</td>
<td>94.4</td>
</tr>
<tr>
<td>No</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>36</strong></td>
<td><strong>11.8</strong></td>
<td><strong>100.0</strong></td>
<td></td>
</tr>
</tbody>
</table>

(Binominal test, p = 0.000)

4.2.6. Institutional aspect (Q34 – Q44)

Cooperation with other companies either private or state, 83.3 % from the respondents have positive answer, while 16.7 % have negative, i.e. they don’t have cooperation with other private and public companies (Q34). The results indicate that there is statistically significant difference between positive and negative cooperation with other companies. In other words, the proportion of positive cooperation with other companies either private or state does significant differ from the hypothesized value of 50 % (Binomial test, p = 0.000) (Tab. 31).

Table 31: Cooperation with other company

<table>
<thead>
<tr>
<th>Cooperation with other company (private or state)</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>30</td>
<td>9.9</td>
<td>83.3</td>
<td>83.3</td>
</tr>
<tr>
<td>No</td>
<td>6</td>
<td>2.0</td>
<td>16.7</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>36</strong></td>
<td><strong>11.8</strong></td>
<td><strong>100.0</strong></td>
<td></td>
</tr>
</tbody>
</table>

(Binominal test, p = 0.000)

Cooperation with PE MF 63.9 % of respondents answered positively, that have cooperation, 36.1 % said that do not cooperate with PE MF (Q35). The results from statistical processing of data show that there is statistically significant difference between positive and negative cooperation of the companies with the PE MF. Therefore the null hypothesis is accepted. In other words, the proportion of positive answer given from the respondents that they have cooperation with PE MF is not significantly differ from the hypothesis that we supply (Binomial test, p = 0.132).

The majority of respondents (39.1 %) the cooperation with PE MF assessed as week, 26.1 % assessed the cooperation as neutral, 21.7 % responded that cooperation is very weak and only 13 % the cooperation assessed as strong (Q36). The results from statistical processing of data show that there is not statistically significant difference between strong and weak cooperation of the companies with the PE MF. Therefore the null hypothesis is rejected. In other words, the proportion of weak cooperation with PE MF is significantly differ from the hypothesis that we supply (Binomial test, p = 0.013).

The cooperation of companies with PE MF in the highest percentage (63.6 %) applies to permits for buying points, collecting of NTFPs, followed by 18.2 % other cooperation
concerning the problems at buying and also here are highlighted cooperation and demands only by PEMF. Following with the same share of percentage 9.1 % cooperation related with agreements to collectors and joint production of essential oils. The results from statistical processing of data show that there is statistically significant difference between equal participation of all kinds of cooperation given by the respondents. Therefore the null hypothesis is accepted. In other words, the proportion of issuing permits for buying points and collection of NTFPs is not significantly differ from the hypothesis that we supply (Binomial test, \( p = 0.286 \)). So cooperation between companies and PE MF lie in above mentioned cooperation equally (Tab. 32).

Table 32: Cooperation with PE MF

<table>
<thead>
<tr>
<th>Cooperation with PE MF, evaluation and description</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>23</td>
<td>7.6</td>
<td>63.9</td>
<td>63.9</td>
</tr>
<tr>
<td>No</td>
<td>13</td>
<td>4.3</td>
<td>36.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, \( p = 0.132 \))

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>very weak</td>
<td>5</td>
<td>1.6</td>
<td>21.7</td>
<td>21.7</td>
</tr>
<tr>
<td>weak</td>
<td>9</td>
<td>3.0</td>
<td>39.1</td>
<td>60.9</td>
</tr>
<tr>
<td>neutral</td>
<td>6</td>
<td>2.0</td>
<td>26.1</td>
<td>87.0</td>
</tr>
<tr>
<td>strong</td>
<td>3</td>
<td>1.0</td>
<td>13.0</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>23</td>
<td>7.6</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, \( p = 0.013 \))

<table>
<thead>
<tr>
<th>Permits for buying points, collecting, use</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agreement for pickers</td>
<td>2</td>
<td>4.9</td>
<td>9.1</td>
<td>72.7</td>
</tr>
<tr>
<td>Mutual production of essential oils</td>
<td>2</td>
<td>4.9</td>
<td>9.1</td>
<td>81.8</td>
</tr>
<tr>
<td>Other (problems at buying, only requirements from their side)</td>
<td>4</td>
<td>9.8</td>
<td>18.2</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>22</td>
<td>53.7</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, \( p = 0.286 \))

Most of the respondents (61.1 %) responded negatively, that do not have cooperation with the MAFWE and 38.9 % said they have cooperation with above mentioned ministry (Q37). The results from statistical processing of data show that there is statistically significant difference between positive and negative cooperation of the companies with the MAFWE. Therefore the null hypothesis is accepted. In other words, the proportion of positive answer given from the...
respondents that they have cooperation with this ministry is not significantly differ from the hypothesis that we supply (Binomial test, p = 0.243).

Half of the respondents (50 %) cooperation with the MAFWE assessed as neutral, the other half of the respondents think that cooperation with the mentioned ministry is very weak, weak and strong (equal percentage 14.3 %) and only 7.1 % consider this cooperation between companies and the ministry like very strong (Q38). The results from statistical processing of data show that there is not statistically significant difference between strong and weak cooperation of the companies with the MAFWE. Therefore the null hypothesis is accepted. In other words, the proportion of strong cooperation with this ministry is not significantly differ from the hypothesis that we supply, i.e. cooperation is evaluated either as weak or strong (Binomial test, p = 1.000).

The cooperation of companies with the MAFWE majority of respondents (37.5 %) describe through the issuing permit for buying, then 18.8 % answered that their cooperation refers to the issuing certificate for organic produce and phytosanitary certificates. The same percentage of respondents 18.8 % said that their cooperation refers to the participation of companies in the preparation of Rulebook of NTFPs, and introducing rules and providing protection to buying points by the above mentioned ministry. 12.5 % of respondents their cooperation with the mentioned ministry recognizes the demands of their side for concessions, plantation works, environmental and land concession, subsidies. The results from statistical processing of data show that there is statistically significant difference between equal participation of all kinds of cooperation given by the respondents. Therefore the null hypothesis is accepted. In other words, the proportion of issuing permit for buying of NTFPs is not significantly differ from the hypothesis that we supply (Binomial test, p = 0.454). So cooperation between companies and MAFWE lie in above mentioned cooperation equally (Tab. 33).

Table 33: Cooperation with MAFWE

<table>
<thead>
<tr>
<th>Cooperation with MAFWE, evaluation and description</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>14</td>
<td>4.6</td>
<td>38.9</td>
<td>38.9</td>
</tr>
<tr>
<td>No</td>
<td>22</td>
<td>7.2</td>
<td>61.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, p = 0.243)

<table>
<thead>
<tr>
<th>Level</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>very weak</td>
<td>2</td>
<td>.7</td>
<td>14.3</td>
<td>14.3</td>
</tr>
<tr>
<td>weak</td>
<td>2</td>
<td>.7</td>
<td>14.3</td>
<td>28.6</td>
</tr>
<tr>
<td>neutral</td>
<td>7</td>
<td>2.3</td>
<td>50.0</td>
<td>78.6</td>
</tr>
<tr>
<td>strong</td>
<td>2</td>
<td>.7</td>
<td>14.3</td>
<td>92.9</td>
</tr>
<tr>
<td>very strong</td>
<td>1</td>
<td>.3</td>
<td>7.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>14</td>
<td>4.6</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, p = 1.000)
Cooperation with the MoEPP 88.9% from respondents assessed positively, they answer that have cooperation with mentioned ministry, 11.1% from responded answer they don’t have cooperation with this ministry (Q39). The results from statistical processing of data show that there is statistically significant difference between positive and negative cooperation of the companies with the MoEPP. Therefore the null hypothesis is rejected. In other words, the proportion of positive answer given from the respondents that they have cooperation with this ministry is significantly differ from the hypothesis that we supply (Binomial test, p = 0.000).

Assessed cooperation between companies and the MoEPP does not differ significantly from the cooperation of the companies with the MAFWE (Q40). The largest percentage of respondents (43.8%) assessed this cooperation as neutral, 34.4% from the respondents assessed as strong, 12.5% responded that this cooperation is weak and only 9.4% think that the cooperation between companies and the MoEPP is very strong. The results from statistical processing of data show that there is not statistically significant difference between strong and weak cooperation of the companies with the MoEPP. Therefore the null hypothesis is rejected. In other words, the proportion of strong cooperation with this ministry is significantly differ from the hypothesis that we supply (Binomial test, p = 0.031).

The largest percentage of respondents (78%) answered that cooperation between companies and the MoEPP refers to the issuing permits of export, import, buying and collection of NTFPs. The remaining respondents its cooperation with the ministry is recognized issuing phytosanitary certificates (7.3%), followed by information on biodiversity and organizing workshops (7.3%) and requirements from ministry’s side to protect the environment and environmental fee (7.3%). The results from statistical processing of data show that there is statistically significant difference between equal participation of all kinds of cooperation given by the respondents. Therefore the null hypothesis is rejected. In other words, the proportion of issuing permits of export, import, buying and collection of NTFPs is significantly differ from the hypothesis that we supply (Binomial test, p = 0.000) (Tab. 34).
Table 34: Cooperation with MAFWE

<table>
<thead>
<tr>
<th>Cooperation with MAFWE, evaluation and description</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>32</td>
<td>10.5</td>
<td>88.9</td>
<td>88.9</td>
</tr>
<tr>
<td>No</td>
<td>4</td>
<td>1.3</td>
<td>11.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, p = 0.000)

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>weak</td>
<td>4</td>
<td>1.3</td>
<td>12.5</td>
<td>12.5</td>
</tr>
<tr>
<td>neutral</td>
<td>14</td>
<td>4.6</td>
<td>43.8</td>
<td>56.3</td>
</tr>
<tr>
<td>strong</td>
<td>11</td>
<td>3.6</td>
<td>34.4</td>
<td>90.6</td>
</tr>
<tr>
<td>very strong</td>
<td>3</td>
<td>1.0</td>
<td>9.4</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>32</td>
<td>10.5</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, p = 0.031)

| permits for export, import, buying, collecting | 32 | 78.0 | 78.0 | 78.0 |
| phytosanitary certificate                   | 3  | 7.3  | 7.3  | 85.4 |
| information about biodiversity, workshops    | 3  | 7.3  | 7.3  | 92.7 |
| request for protection of environment and land concession, environmental fee | 3  | 7.3  | 7.3  | 100.0 |
| Total                                      | 41 | 100.0| 100.0|      |

(Binomial test, p = 0.000)

Documents necessary for the whole process of buying, processing, selling and export of NTFPs provided by respondents are the following: permit for export and import, permit for buying, permit to collect affected and protected species, permit of organic origin, permit for buying points, permission from Food Agency, phytosanitary certificate, certificate for organic production, EU 1 certificate, HACCP certificate, bill of lading, buying notes, attestation of products, radiological analysis (Q41). Large percentage of respondents, 80.6 % think that obtaining the necessary documents for the whole process of buying, processing, selling and export of NTFPs is not difficult, 16.7 % think that obtaining the necessary documents is difficult (Q42). The results from statistical processing of data with Chi square test have shown that there is statistically significant difference between question options, i.e. difficult or not difficult to obtain the necessary documents. Hence the null hypothesis is rejected, therefore the obtaining necessary documents for the whole process is not difficult (Chi - square test = 37.167, df = 2, p = 0.000) (Tab. 35).
Table 35: Necessary documents

<table>
<thead>
<tr>
<th>Number of necessary documents</th>
<th>Frequency</th>
<th>Valid percent</th>
<th>Observed N</th>
<th>Expected N</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>6</td>
<td>16.7</td>
<td>6</td>
<td>12.0</td>
<td>-6.0</td>
</tr>
<tr>
<td>No</td>
<td>29</td>
<td>80.6</td>
<td>29</td>
<td>12.0</td>
<td>17.0</td>
</tr>
<tr>
<td>I don’t know</td>
<td>1</td>
<td>2.8</td>
<td>1</td>
<td>12.0</td>
<td>-11.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>36</strong></td>
<td><strong>100.0</strong></td>
<td><strong>36</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Chi - square test = 37.167, df = 2, p = 0.000)

A large percentage of respondents (75 %) answered that the cost of obtaining the necessary documents are reasonable, 13.9 % considered that these costs are high, 5.6 % believe that the costs are very high. The same percentage of respondents (5.6 %) thinks that the costs of obtaining the necessary documents are low (Q43). The results from statistical processing of data shown that there is statistically significant difference between reasonably cost for obtaining necessary documents and the rest costs answer in the question. Therefore the null hypothesis is rejected, i.e. reasonably costs for obtaining necessary documents does not significant differ from other costs (Binomial test, p = 0.004) (Tab. 36).

Table 36: Costs for necessary documents

<table>
<thead>
<tr>
<th>Cost for issuing the necessary documents</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>low</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>5.6</td>
</tr>
<tr>
<td>reasonable</td>
<td>27</td>
<td>8.9</td>
<td>75.0</td>
<td>80.6</td>
</tr>
<tr>
<td>high</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
<td>94.4</td>
</tr>
<tr>
<td>very high</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>100.0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>36</strong></td>
<td><strong>11.8</strong></td>
<td><strong>100.0</strong></td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, p = 0.004)

Majority of the respondents (69.4 %) believe that the time required for collecting the necessary documentation is reasonable, 22.2 % believe that time is long and 8.3 % think that the time required for collecting the necessary documentation is short (Q44). The results from statistical processing of data show that there is statistically significant difference between reasonable collecting of necessary documents and the rest answers for collecting of necessary documents. Therefore the null hypothesis is rejected, i.e. reasonable collecting of necessary documents does not significant differ from other answer given in question (Binomial test, p = 0.029) (Tab. 37).
Table 37: Time spent for necessary documents

<table>
<thead>
<tr>
<th>Spent time for collecting necessary documents</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>long</td>
<td>8</td>
<td>2.6</td>
<td>22.2</td>
<td>22.2</td>
</tr>
<tr>
<td>reasonable</td>
<td>25</td>
<td>8.2</td>
<td>69.4</td>
<td>91.7</td>
</tr>
<tr>
<td>short</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

(Binomial test, p = 0.029)

Capacity and percentage of capacity utilization per year of the companies for three analyzed NTFPs and cooperation with private and public enterprises, PE MF, MAFWE and MoEPP are correlated.

Capacity of the company for mushrooms is positively related to the cooperation that companies have with other enterprises (both private and public enterprises), with a coefficient $r = 0.180$ (low to moderate relationship) significant at level 0.351. But the percentage of capacity utilization per year for mushrooms is negatively related to the cooperation that companies have with other enterprises (both private and public enterprises), with a coefficient $r = -0.194$ (low to moderate relationship) significant at level 0.314. Capacity of the company for aromatic and medicinal plants is negatively related to the cooperation that companies have with other enterprises (both private and public enterprises), with a coefficient $r = -0.731^*$ (very strong relationship) significant at level 0.025. But the percentage of capacity utilization per year for aromatic and medicinal plants is positively related to the cooperation that companies have with other enterprises (both private and public enterprises), with a coefficient $r = 0.483$ (moderate to substantial relationship) significant at level 0.157. Capacity of the company for berries and other fruits is positively related to the cooperation that companies have with other enterprises (both private and public enterprises), with a coefficient $r = 0.086$ (trivial relationship) significant at level 0.684. But the percentage of capacity utilization per year for berries and other fruits is negatively related to the cooperation that companies have with other enterprises (both private and public enterprises), with a coefficient $r = -0.292$ (low to moderate relationship) significant at level 0.156.

Capacity of the company for mushrooms is positively related to the cooperation that companies have with PE MF, with a coefficient $r = 0.201$ (low to moderate relationship) significant at level 0.296. At the same time the percentage of capacity utilization per year for mushrooms is positively related to the cooperation that companies have with PE MF, with a coefficient $r = 0.122$ (low to moderate relationship) significant at level 0.529. Capacity of the company for aromatic and medicinal plants is negatively related to the cooperation that companies have with PE MF, with a coefficient $r = -0.552$ (substantial to very strong relationship) significant at level 0.123. But the percentage of capacity utilization per year for aromatic and medicinal plants is positively related to the cooperation that companies have with PE MF, with a coefficient $r = 0.460$ (moderate to substantial relationship) significant at level 0.181. Capacity of the company for berries and other fruits is positively related to the
cooperation that companies have with PE MF, with a coefficient $r = 0.139$ (low to moderate relationship) significant at level 0.508. At the same time the percentage of capacity utilization per year for berries and other fruits is positively related to the cooperation that companies have with PE MF, with a coefficient $r = 0.081$ (trivial relationship) significant at level 0.699. Capacity of the company for mushrooms is negatively related to the cooperation that companies have with the MAFWE, with a coefficient $r = -0.208$ (low to moderate relationship) significant at level 0.278. But the percentage of capacity utilization per year for mushrooms is positively related to the cooperation that companies have with the MAFWE, with a coefficient $r = 0.168$ (low to moderate relationship) significant at level 0.385. Capacity of the company for aromatic and medicinal plants is positively related to the cooperation that companies have with the MAFWE, with a coefficient $r = 0.611$ (substantial to very strong relationship) significant at level 0.080. But the percentage of capacity utilization per year for aromatic and medicinal plants is negatively related to the cooperation that companies have with the MAFWE, with a coefficient $r = -0.036$ (trivial relationship) significant at level 0.922. Capacity of the company for berries and other fruits is negatively related to the cooperation that companies have with the MAFWE, with a coefficient $r = -0.371$ (moderate to substantial relationship) significant at level 0.068. But the percentage of capacity utilization per year for berries and other fruits is positively related to the cooperation that companies have with the MAFWE, with a coefficient $r = 0.163$ (low to moderate relationship) significant at level 0.436.

Capacity of the company for mushrooms is negatively related to the cooperation that companies have with the MoEPP, with a coefficient $r = -0.425^*$ (moderate to substantial relationship) significant at level 0.022. But the percentage of capacity utilization per year for mushrooms is positively related to the cooperation that companies have with the MoEPP, with a coefficient $r = 0.230$ (low to moderate relationship) significant at level 0.230. Capacity of the company and percentage of capacity utilization per year for aromatic and medicinal plants is not in correlation or there is no relation and dependency with cooperation that companies have with the MoEPP. Capacity of the company for berries and other fruits is negatively related to the cooperation that companies have with the MoEPP, with a coefficient $r = -0.576^*$ (substantial to very strong relationship) significant at level 0.003. But the percentage of capacity utilization per year for berries and other fruits is positively related to the cooperation that companies have with the MoEPP, with a coefficient $r = 0.130$ (low to moderate relationship) significant at level 0.537.

4.3. Survey results for pickers

In the following are results of the surveys with semi – structured questionnaire for pickers (collectors) in the Republic of Macedonia. For this purpose, the answers to the 27 questions (Q1 – Q27) are grouped into socio – demographic profile, present market situation and market elements and actors.

4.3.1. Socio - demographic profile of pickers (Q1 – Q7)

The total number of respondents is 138, where the youngest respondent is 19 years old and the oldest 70 years (Q1). The mean value of their age is 50 years, where 3.6 % are up to 20
years, 18.1 % at the age 21-40, 54.3 % at the age 41-60 and 23.9 % are over 60 years (Fig. 10).

Figure 10: Age of pickers

![Age distribution](image1.png)

Male respondents (Q2) dominate with 84.78 % and 15.22 % are female (Fig. 11).

Figure 11: Sex of pickers

![Gender distribution](image2.png)

The majority of respondents 80.4 % have lower secondary education, then 13 % are with primary education, only 4.3 % have faculty level education and 2.2 % are with upper secondary education (Q3). Neither respondent have a more than faculty level education (Fig. 12).
All respondents answered that their households consisting of at least 1 person, maximum 8 peoples (Q4). Mean number of people in households of pickers is 4 peoples or expressed in percentages 43.5 %. Pickers have minimum 1 child, maximum 4 children, while mean value of children per household is 2 children (Q5). In percentage number of children in household is 80.4 %, while 19.6 % answered that they do not have children (Tab. 38).

A larger percentage of pickers are not employed (52.2 %), while 47.8 % are employed. The largest percentage of pickers 45.5 % are employed in private sector, while 40.9 % from them are pensioners, 9.1 % from pickers have worked in private sector and 4.5 % are employed in public administration (Q6 and Q7).

### 4.3.2. Present market situation (Q8 – Q18)

NTFPs that are collected from the pickers are mushrooms, berries, nuts, fruits, aromatic and medicinal herbs (Q8). No one from the pickers did not answer that they collected truffles despite it have been was offered in response. Therefore the largest percentages (82.6 %) from the pickers collected mushrooms, and then followed aromatic and medicinal herbs with 52.2 %. After that are other NTFPs with 43.5 % and berries, nuts, fruits with 41.3 %. Other NTFPs that are collected by pickers are juniper, dog rose, and moss (Tab. 39).
Table 39: Collected NTFPs

<table>
<thead>
<tr>
<th>Frequencies of collected NTFPs</th>
<th>Responses</th>
<th>Percent of cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>114</td>
<td>37.6%</td>
</tr>
<tr>
<td>Berries, nuts, fruits</td>
<td>57</td>
<td>18.8%</td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td>72</td>
<td>23.8%</td>
</tr>
<tr>
<td>Other</td>
<td>60</td>
<td>19.8%</td>
</tr>
<tr>
<td>Total</td>
<td>303</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

(Chi square test = 18.564, df = 1, p = 0.000)

From this question the null hypothesis of equal collecting of all NTFPs was assumed. From the processed results with Chi square test we can conclude that the representation of all NTFPs which are collected is not equal. Therefore follows that the null hypothesis have to reject, or collection of all NTFPs is significantly different (Chi - square test = 18.564, df = 1, p = 0.000). This implies that mostly are collected mushrooms, which are shown with their share percentage.

Descriptive statistics of data shows that the mean time value of collecting NTFPs is 18 years, while the minimum time for collecting NTFPs is 3 years and maximum is 50 years (Q9). From the frequencies of data can be seen that 52.2 % from pickers perceive NTFPs like products with high quality, 34.8 % of them thinking that they are products with medium quality and 13 % perceive NTFPs as products with poor quality, bought only because of the low price (Q10). From this question the null hypothesis of equal perceiving of NTFPs was assumed. From the processed results with Chi square test we can conclude that the perceiving of NTFPs is equal. Therefore follows that the null hypothesis have to accept, or perceiving of NTFPs either as products with high, medium and poor quality is not significantly different (Chi - square test = 0.261, df = 1, p = 0.610). This shows that, although the greatest percentage is present in products with high quality, it has not proved statistically significant.

Largest percentage of respondents (56.5 %) answered that almost always pickers collect individually NTFPs, 19.6 % answered rarely collects individually and 17.4 % sometimes collect individually. With the family rarely collected 39.1 %, sometimes collect 28.3 % and almost always collect 21.7 %. With the friends rarely collected 47.8 %, sometimes collect 28.3 % and almost always 13 % (Q11). Most percentage of pickers (97.8 %) is not organized as pickers and only 2.2 % of them do not know whether they are organized as pickers (Q12). Majority of pickers (78.3 %) responded that there is no association at national level and 21.7 % of them do not know if there is such kind of association at national level (Q13). Equipment that pickers used during the collection of NTFPs is as follows: knife, stick, basket, gloves, comb, grid, sacks, sickle, scissors, sieve, and boots (Q14). Furthermore 91.3% of pickers responded that they were not been on educational training course for collecting NTFPs, while only 8.7 % responded that attended an educational training course. All pickers who attended on an educational training course responded that those courses were organized by the buyers. The topic of the courses was proper manner on collection of NTFPs (Q15).
According to the answers from pickers they spend approximately minimum 10 days per year and maximum 100 days per year in collecting NTFPs. Therefore the mean value of approximately spend days per year in collecting NTFPs was 36 days (Q16). The average minimum quantity collected during one season was 40 kg, while average maximum quantity collected during one season was 1400 kg. Therefore the mean average quantity collected during one season was 462 kg. But average minimum quantity collected within one day was 3 kg and average maximum quantity collected within one day was 60 kg. Further the mean average quantity collected within one day was 14 kg (Q17). The 460 kg of collected mean average quantity of NTFPs during one season was assumed. According to one simple t test results with null hypothesis that the collected mean average quantity of NTFPs differs statistically significant from 460 kg failed, i.e. we can say that collected mean average quantity of NTFPs during one season is around 460 kg (t = 0.051, p = 0.960). From the other side the 15 kg of collected mean average quantity of NTFPs within one day was assumed. According to one simple t test results with null hypothesis that the collected mean average quantity of NTFPs differs statistically significant from 15 kg failed, i.e. we can say that collected mean average quantity of NTFPs within one day is around 15 kg (t = - 1.139, p = 0.257) (Tab. 40).

Table 40: Average quantity of collected NTFPs

<table>
<thead>
<tr>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average quantity of collected NTFPs within one season</td>
<td>138</td>
<td>40</td>
<td>1400</td>
</tr>
<tr>
<td>(t = 0.051, p = 0.960)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average quantity of collected NTFPs within one day</td>
<td>138</td>
<td>3</td>
<td>60</td>
</tr>
<tr>
<td>(t = - 1.139, p = 0.257)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The average distance that pickers have to travel for collecting NTFPs was 18 km, where the minimum distance was 3 km and maximum distance was 50 km (Q18). The 20 km of average distance that pickers have to travel for collecting NTFPs was assumed. According to one simple t test results with null hypothesis that the average distance that pickers have to travel for collecting NTFPs differs statistically significant from 20 km failed, i.e. we can say that average distance is around 20 km (t = - 1.755, p = 0.081) (Tab. 41).

Table 41: Average distance for collecting NTFPs (km)

<table>
<thead>
<tr>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average distance for collecting NTFPs (km)</td>
<td>138</td>
<td>3</td>
<td>50</td>
</tr>
<tr>
<td>(t = - 1.755, p = 0.081)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4.3.3. Market elements and actors (Q19 – Q27)

Average quantities of collected NTFPs pickers are used for household consumption and for selling to the buyers (Q19). Mean average quantities of mushrooms for household consumption was 22 kg or 19 % of collected mushrooms they used for domestic needs. Furthermore most of collected mushrooms are for selling. The mean average quantity of collected mushrooms which are sold to buyers was 313 kg or 94% of the total average quantity of collected mushrooms. From the other side pickers answered that mean average quantities of aromatic and medicinal plants that they used for household consumption was 21 kg or 94 % of the total average quantity of collected aromatic and medicinal plants. This percentage is so high because most of pickers are collected aromatic and medicinal plants only for domestic used. A small part of pickers collected aromatic and medicinal plants for selling. But these quantities are high because the whole plants are collected and after it are separated. The mean average quantities of collected aromatic and medicinal plants which are sold to buyers was 153 kg or 65 % from the total average quantity of collected aromatic and medicinal plants. The mean average quantities of berries and other fruits which are used for household consumption was 22 kg or 53 % of total average quantity of collected berries and other fruits. The rest of collected berries and other fruits was 118 kg or 90 %. Those quantities are sold to the buyers and they are placed on the market. Other NTFPs which are identified by pickers as are commonly collected are juniper, dog rose and moss. Their mean average quantities for household consumption were 19 kg or 33 % of total average quantity of collected other NTFPs. Therefore the rest quantities of collected other NTFPs were 360 kg or 98 % and it are sold to the buyers (Tab. 42).

Table 42: Average quantities of collected NTFPs

<table>
<thead>
<tr>
<th>Average quantities of collected NTFPs</th>
<th>Mean value for household consumption</th>
<th>Mean value for selling</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>kg</td>
<td>%</td>
</tr>
<tr>
<td>Mushrooms</td>
<td>21.78</td>
<td>19.37</td>
</tr>
<tr>
<td>Medicinal and aromatic plants</td>
<td>21.27</td>
<td>94.23</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>21.64</td>
<td>53.14</td>
</tr>
<tr>
<td>Other</td>
<td>19.25</td>
<td>33.25</td>
</tr>
</tbody>
</table>

As the most important problems that pickers are facing during the collection of NTFPs are identified lack of forest road, too much time spent on collection, low price of NTFPs, lack of buying points and other problems (Q20). The largest percentage of respondents 41.3 % think that lack of forest road is unimportant as a main problem during collection of NTFPs. After that 28.3 % from pickers think that this is important problem in collection of NTFPs, while 17.4 % think it is a very important problem. 10.9 % believe that the lack of forest road is very unimportant as main problem, and only 2.2 % were neutral in their thinking. Too much time

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spent on collection 34.8 % from pickers believe that is very important as one of the main problems for collection on NTFPs. As unimportant problem agree 26.1 % from pickers, while 19.6 % were neutral in their thinking and 15.2 % are consider like important problem in collection of NTFPs. Very high percentage, 76.1 % think that the low price of NTFPs is the main problem faced during the collection, 21.7 % think that is important problem and only 2.2 % were neutral in their thinking.

Lack of buying points as unimportant problem think 34.8 % from pickers, followed 26.1 % think that it is important problem, than 17.4 % were neutral in their thinking, and 10.9 % think that this problem is very unimportant and same percentage think that is very important problem. Other problems mentioned by the pickers are presence of many collectors and burnt areas. These problems are assessed as very important from 66.7 % of pickers and as important from 33.3 % of pickers (Tab. 43).

Table 43: Main problems during the collection of NTFPs

<table>
<thead>
<tr>
<th>Main problems that pickers are facing during the collection of NTFPs</th>
<th>Frequency</th>
<th>Valid percent</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lack of forest road</strong></td>
<td></td>
<td></td>
<td>3.00</td>
</tr>
<tr>
<td>very unimportant</td>
<td>15</td>
<td>10.9</td>
<td></td>
</tr>
<tr>
<td>unimportant</td>
<td>57</td>
<td>41.3</td>
<td></td>
</tr>
<tr>
<td>neutral</td>
<td>3</td>
<td>2.2</td>
<td></td>
</tr>
<tr>
<td>important</td>
<td>39</td>
<td>28.3</td>
<td></td>
</tr>
<tr>
<td>very important</td>
<td>24</td>
<td>17.4</td>
<td></td>
</tr>
<tr>
<td><strong>Too much time spent on the collection</strong></td>
<td></td>
<td></td>
<td>5.63</td>
</tr>
<tr>
<td>very unimportant</td>
<td>3</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td>unimportant</td>
<td>27</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>neutral</td>
<td>48</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>important</td>
<td>2.2</td>
<td>26.1</td>
<td></td>
</tr>
<tr>
<td>very important</td>
<td>19.6</td>
<td>15.2</td>
<td></td>
</tr>
<tr>
<td>I don’t know</td>
<td>34.8</td>
<td>2.2</td>
<td></td>
</tr>
<tr>
<td><strong>Low price of NTFPs</strong></td>
<td></td>
<td></td>
<td>4.74</td>
</tr>
<tr>
<td>neutral</td>
<td>3</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>important</td>
<td>105</td>
<td>2.2</td>
<td></td>
</tr>
<tr>
<td>very important</td>
<td>21.7</td>
<td>76.1</td>
<td></td>
</tr>
<tr>
<td><strong>Lack of buying points</strong></td>
<td></td>
<td></td>
<td>2.91</td>
</tr>
<tr>
<td>very unimportant</td>
<td>15</td>
<td>48</td>
<td></td>
</tr>
<tr>
<td>unimportant</td>
<td>24</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td>neutral</td>
<td>15</td>
<td>10.9</td>
<td></td>
</tr>
<tr>
<td>important</td>
<td>34.8</td>
<td>17.4</td>
<td></td>
</tr>
<tr>
<td>very important</td>
<td>26.1</td>
<td>10.9</td>
<td></td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
<td></td>
<td>4.67</td>
</tr>
<tr>
<td>important</td>
<td>3</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>very important</td>
<td>33.3</td>
<td>66.7</td>
<td></td>
</tr>
</tbody>
</table>
In the opinion of pickers 45.7% responded that NTFPs are important for their family budget, 30.4% responded that NTFPs are very important for their family budget, 15.2% think that NTFPs are unimportant, 6.5% neither important nor unimportant and only 2.2% responded that NTFPs are unimportant at all for their family budget. The mean value was 3.87, which means that NTFPs are important for the family budget of the pickers (Q21).

Most of pickers answered that price of NTFPs is determinate by the buyers. They set the price, while pickers have nothing in determination of price. Someone of the pickers think that price is dictated by the market and quality and quantity of offered NTFPs. According to the opinion of pickers, factors which influence in determination the price of NTFPs are quality and quantity of NTFPs. Also mentioned factors are the global market, its supply and demand for NTFPs (Q22 and Q23).

The mean average price for 1 kg mushrooms on the market in the Republic of Macedonia was 1.9 euro, for aromatic and medicinal plants was 1.5 euro, for berries and other fruits was 1.2 euro and for other NTFPs (juniper, dog rose, moss) was 0.8 euro (Q24) (Tab. 44).

Table 44: Average price for 1 kg NTFPs on the market

<table>
<thead>
<tr>
<th>NTFPs</th>
<th>Average price for 1 kg NTFPs on the market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>1.92</td>
</tr>
<tr>
<td>Aromatic and medicinal plants</td>
<td>1.505</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>1.289</td>
</tr>
<tr>
<td>Other</td>
<td>0.868</td>
</tr>
</tbody>
</table>

According to the pickers 78.3% responded that there are enough buyers NTFPs, while 10.9% responded that the number of buyers is not sufficient. Their opinion why the numbers of buyers have to be increased, they explain with the large distance of buying points from their places of living and the possibility to have competition in the buying price. From the other side 82.6% of the pickers responded that companies buying all collected quantities of NTFPs offered from one picker. Only 17.4% think that companies cannot buy all quantities of NTFPs offered from one picker (Q25 and Q26).

The largest percentage of pickers (56.5%) sell raw NTFPs, then 41.3% sell both (raw and processed) NTFPs and finally only 2.2% sell only processed NTFPs. The mean value of sold both type of NTFPs expressed in percentages was 72% for raw NTFPs, while the mean value of sold processed NTFPs was 34% (Q27). The 70% of average sold raw NTFPs was assumed. According to one simple t test results with null hypothesis that the average selling raw NTFPs differs statistically significant from 70% failed, i.e. we can say that average sold raw NTFPs is around 70% (t = 1.055, p = 0.296). The 35% of average sold process NTFPs was assumed. According to one simple t test results with null hypothesis that the average selling process NTFPs differs statistically significant from 35% failed, i.e. we can say that average sold process NTFPs is around 35% (t = -0.352, p = 0.726) (Tab. 45).
Table 45: Selling NTFPs

<table>
<thead>
<tr>
<th>Selling NTFPs</th>
<th>Frequency</th>
<th>Valid Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raw NTFPs</td>
<td>78</td>
<td>56.5</td>
</tr>
<tr>
<td>Process NTFPs</td>
<td>3</td>
<td>2.2</td>
</tr>
<tr>
<td>Both</td>
<td>57</td>
<td>41.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>138</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

**Mean in %**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Raw NTFPs</td>
<td>72.38</td>
</tr>
<tr>
<td>(t = 1.055, p = 0.296)</td>
<td></td>
</tr>
<tr>
<td>Process NTFPs</td>
<td>34.00</td>
</tr>
<tr>
<td>(t = -0.352, p = 0.726)</td>
<td></td>
</tr>
</tbody>
</table>
5. Discussion and Conclusions

The collection of NTFPs in the Republic of Macedonia has a history of the previous system, which shows that 27.8% of the companies continued their work during the transition process. But the rest of the analyzed companies (69.5%) were established from 1993 until today. Of course, there is potential for NTFPs and establishment of new enterprises in this sector in the Republic of Macedonia. However, transitional economy require new market rules and that are the reasons why is no initiative for establishment of new enterprises in this sector. It could be topic for another research.

Performance of the companies from the very beginning of their formation is associated only with NTFPs. In other words, all companies work only with NTFPs, and could not be said which activity of the companies is the most common and main activity, because the main activities of the examined companies are buying, processing and selling at the same time.

According to EU Commission recommendation 2003/361/EC about number of employees, the largest percentage (80.6%) from the companies in the Republic of Macedonia belong to the micro enterprises (1 - 9 employees), while others (16.7%) belong to small enterprises (10 - 49 employees). But seasonal work in the NTFPs sector requires that companies have to hired seasonal workers which mean number was 26 seasonal workers. Business owners are mostly male persons (72.2%) with completed college education in average age of 46 years.

On the other hand, the pickers of NTFPs are also male persons (84.78%) of approximately the same average age (50 years), but most with a title from a high school. Average household of pickers consist of 4 members with average number of 2 children per family. Most pickers are unemployed and therefore income from NTFPs for their family budget is important.

There is no distinct difference in the supply of NTFPs or companies and collectors are agreeing mutually which way the best suits for them, and which way are more efficient and easier for buying of NTFPs. This means that usually pickers are bringing collected products in the companies, but if it is necessary companies are visiting villages and buying NTFPs from the pickers there. The results have shown that around 120 pickers are cooperating with companies. The most common vehicles that companies use in the buying of NTFPs are van and car and the average distance from the companies to the buying points of NTFPs is around 100 km. There is positive substantial to very strong correlation between capacity of the companies for mushrooms and berries and other fruits with average distance from companies to the buying points. At the same time percentage of capacity utilization per year for berries and other fruits is positive low to moderate correlation with the average distance from companies to the buying points, but this correlation for mushrooms is negatively trivial relationship. But capacity and percentage of capacity utilization per year for aromatic and medicinal plants is negatively related with the average distance from companies to the buying points. Perhaps this is due to faster failure and destruction of mushrooms and berries and other fruits, if they are not transported in time apart from aromatic and medicinal plants.

Furthermore, pickers collect NTFPs that are most required by the buyers. The collection of NTFPs in the last twenty years is almost always performed individually, rarely with family
and friends. In general, pickers do not make difference whether NTFPs as a products with high, medium or poor quality. Perhaps this is due to their unawareness of quality and economic importance of NTFPs. The most of interviewed pickers have never been on the training course related to the proper manner of collecting NTFPs, but according to the results knife, sickle, and rakes are the most common tools which are used during the collection process of NTFPs. Some of them stated that they harvest mushrooms without any tool, but in that way the quantities of NTFPs are endangered and it can come to their disappearance in the long term period. Having this in mind, the more on the half companies have offered training courses for the sustainable manner on collection of NTFPs, sustainable management with NTFPs, education about protection of NTFPs, how to get better quality from NTFPs, how to pick, store and carry up of NTFPs till the process of buying. During one season pickers average spend month to month and a half in collecting NTFPs. Thereby the average quantities of NTFPs collected in one season amounted to around 460 kg, while the average quantities of NTFPs collected in one day is around 15 kg. Usually the average distance which the collectors have to travel for collecting NTFPs is around 20 km.

According to results the price of NTFPs varies widely. The most important factor that was stressed by the interviewed is the weather. It means that if it is a lot of rain and moisture than the quantities are bigger. If there are more mushrooms on the market their price is lower. The price also varies depending of the quality of NTFPs and influence of the international market. This phenomenon is mostly noted with mushrooms because they have big differences in prices depending on the time of collection, whether it is a spring collection of mushrooms or autumn collection of mushrooms and certainly also from the quality that mushrooms have been associated with time when gathering mushrooms itself. The most important activities that influence the price of the product according to the respondents are buying, transport, and packaging. Also research has shown that, marketing activities and other activities (communicating with customers, product quality and competition) does have influence in establishment the price of the products in NTFPs sector. Furthermore, the respondents pointed out that the price varies also depending of changes in the market conditions, quality and quantity of NTFPs and unfair competition.

Another conclusion which can be noted is that, there are two levels of companies, the first one are acting like middlemen, they buying from the pickers and then they process NTFPs and then sell to the second level or the biggest companies that are exporting to the markets in Europe and worldwide. Therefore, the equipment in the companies varies. The second level companies have more modern equipment which is necessary for the entire process of buying, processing, selling and export of NTFPs in contrary of the first level companies instead from the companies from the first level which has older equipment.

The mean average price for 1 kg mushrooms on the market in the Republic of Macedonia is 1.9 euro, for aromatic and medicinal plants is 1.5 euro, for berries and other fruits is 1.2 euro and for other NTFPs (juniper, dog rose, moss) is 0.8 euro. The price of NTFPs on the market in the Republic of Macedonia is determinate by the buyers. Buyers determine the price in accordance with the requirements of global market and according to the requirements of outside buyers. There are enough buyers of NTFPs, which are buying all collected quantities of NTFPs, but there is a need for bigger quantities of NTFPs or a need of larger number of collectors. All this shows that, there are insufficient numbers of collectors, due to which
demand of NTFPs are bigger than their supply. This may be related to the problems which pickers are faced during the collection of NTFPs: low price of collected NTFPs, too much time spent on collection, forest fires, etc.

Countries where the mushrooms are mostly exported are Italy, France and Germany with 92% of the total export of mushrooms. In contrary most of the export of aromatic and medicinal plants are exported to USA, ex YU and Russia (76%). Furthermore, the export of berries and other fruits is uniform in all countries, i.e. export of berries and other fruits are not differing by countries. 99% of berries and other fruits are exported to Italy, Germany and Serbia. Other non wood forest products which often include juniper, dogrose, and blackberries are exported in Germany and Italy with 85% of total quantity of other non wood forest products. The small part (10.8%) of buying products is selling in shops and retail on domestic market.

The high price of NTFPs is positive correlate with capacity and percentage of capacities utilization of the companies for mushrooms, aromatic and medicinal plants and berries and other fruits. This means that by increasing the price of NTFPs companies can increase their working capacity, and as the percentage of capacity utilization per year. Exception from this is substantial to very strong negative correlation between percentage of capacity utilization per year for aromatic and medicinal plants with high price of NTFPs. Contrary to the above mentioned, the lack of buying points is negatively low to moderate correlate with capacity and percentage of capacity utilization per year for mushrooms, aromatic and medicinal plants and berries and other fruits. This means that the lack of buying points does not affect the capacity and percentage of capacity utilization annually. Exception from this is capacity of the company for mushrooms which is positively related to the lack of buying points, i.e. with the increasing scarcity of buying points, shell be reduce the capacity of companies for buying mushrooms.

According to the results that the operations which followed after the buying of NTFPs: selling, drying, processing, packaging, and freezing NTFPs are equally prevalent in the two level companies (companies which exported and companies which acting like middlemen). Furthermore the mean percentage of capacity utilization of companies for mushrooms, aromatic and medicinal plants and berries and other fruits is around 50% which means that there is possibility, potential of the companies for higher buying, processing and selling of much more NTFPs.

Main problems of the companies dealing with NTFPs in RM pointed out by the interviewers are: unfair competition, insufficient labour and payment. There are a lot of unregistered companies (people) who are competitive and they do not pay any taxes to the state which contributes to decrease market price. From the other side, companies disagree with the current legal framework which they address inappropriate.

The collected quantities of NTFPs are used mostly for selling, while small part of the total collected quantities are used for household consumption. Mostly are selling raw NTFPs, versus twice lower quantities processed NTFPs. It is due to lack of equipment for drying NTFPs by pickers. Because of that the prices which are received for buying of raw NTFPs are smaller. Therefore pickers are in a difficult economic situation and without help from the state in the form of subsidies, favourable loans there is no way to handle with that situation. The consequence of this is declining interest among collectors and the reduced number of collectors of NTFPs.
There is a positive opinion on the assessment of the importance of marketing tools in NTFPs sector. In other words, the opinion for the importance of developed channels of distribution and familiar product/name (brand) are positive, while the opinion for the importance of advertising is neither positive nor negative. The use of marketing tools: PR, advertising and branding for promotion of the companies are very rarely used in the sector of NTFPs. The most important reasons for the rare used of marketing tools is the lack of final product, which supposed to be promoting for more efficient and effective selling. The overall quantities are exported either raw or semi raw NTFPs, but in this way they are not ready for direct distribution to the end users (consumers). From the other side, the most successful marketing tools for NTFPs sector would be advertising, PR, developed channels of distribution and branding of the products in circumstances when there would be a final product in this sector. The reasons for using these marketing tools in NTFPs sector are more focused on promoting companies, promoting companies’ products and the quality of the products of companies. At the same time marketing tools are also success for better sales of products and better communication and cooperation as between companies and with consumers at the same time, and reliable buyers and growing number of consumers.

Necessary documents for the whole process of buying, processing, selling and export of NTFPs are: permit for export and import, permit for buying, permit to collect endangered and protected species, permit of organic origin, permit for buying points, permission from Food Agency, phytosanitary certificate, certificate for organic production, EU 1 certificate, HACCP certificate, bill of lading, buying notes, attestation of products, radiological analysis. Therefore the obtaining necessary documents for the whole process is not difficult, and spent time and costs for obtaining necessary documents are reasonably.

The results have shown that there is cooperation between companies in the NTFPs sector and other companies either private or public. Cooperation with PE MF which is responsible for management of 90% of the state forests in the Republic of Macedonia lie in issuing permits for buying points and collection of NTFPs. This cooperation is assessed as week cooperation. Cooperation of the companies with the MAFWE is evaluated as neither weak nor strong cooperation. This cooperation refers to the issuing permit for buying, issuing certificate for organic production and phytosanitary certificates. Therefore their cooperation refers to the participation of representatives of the companies in the preparation of Rulebook of NTFPs, and introducing rules and providing protection to buying points by the above mentioned ministry. Assessed cooperation between companies and the MoEPP does not differ significantly from the cooperation of the companies with the MAFWE. This cooperation between companies and MoEPP is evaluated like a strong cooperation which refers to the issuing permits of export, import, buying and collection of NTFPs. Based on the above mentioned cooperation between companies and public institutions can be concluded that the cooperation is based only on the issuance of the necessary documents for the process of collecting, buying, processing and export of NTFPs. There are overlaps in competence and regulation of non-timber forest products in the Republic of Macedonia. Companies which exported NTFPs are cooperate with MoEPP, while companies that act as middlemen cooperate with MAFWE for obtaining permits necessary for their operation. Also the companies have to pay fee for opening buying points to PE MF and from the other hand, pickers also have to pay fee for annual licenses for collecting NTFPs. Therefore should be
introduced a mechanism to overcome the irregularities and gaps that exist in this sector and harmonization of existing laws, cross - sectored collaboration and cooperation for sustainable management of NTFPs. Furthermore this harmonization will lead to more efficient and effective work of companies and it would be contribute to promoting the NTFPs sector by self and NTFPs as economically important products, especially among collectors.
Annex 1: Questionnaire for companies (processors)

I. Socio-demographic questions or Profile

1. How old are you?

2. Gender
   1. Female 2. Male

3. Education
   1. Primary
   2. Lower secondary
   3. Upper secondary
   4. Faculty level
   5. More than faculty level

4. Position in the company
   1. Owner
   2. Manager
   3. Employee
   4. PR
   5. Consultant
   98 Other

II. General information about the company

5. Location

6. How many people work in your company?

How many, of them, are seasonally hired workers?

7. When your company was establish

   (year)

8. Does your company deal with NTFPs from the beginning?
   1. Yes
   2. No (if No)

8.a. What was the reason for changing main activity?

99 I don’t know
9. Main company’s activities? (multiple answers)
   1. collecting NTFPs
   2. buying NTFPs
   3. processing NTFPs
   4. selling NTFPs
   98 other ________________________________

III. Buying NTFPs

10. Can you tell me with which NTFPs you are dealing and in what quantities?

<table>
<thead>
<tr>
<th>NTFPs</th>
<th>1-Yes</th>
<th>2-No</th>
<th>Quantities average (in kg/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td>1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Other (specify)</td>
<td>1</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

11. What type of supply of NTFPs you use? (possible multiple answers)
   1. Own buying points
   2. Use other buying points
   3. Pickers come in our company
   4. Own picker list and contact them
   5. Village visit
   98 Other ________________________________

12. What kind of transportation means do you use when you buy the NTFPs? (possible multiple answers)
   1. Van
   2. Car
   3. Truck
   98 Other (please specify) ________________________________

13. What is the average distance from your company to the buying points?
    ________________________________________________________ (km)

14. Can you tell me with how many people/companies do you cooperate, when buying NTFPs?
    _______________________________________________________
15. Can you tell me: What is the average price per NTFPs product that you pay and sell the products?

<table>
<thead>
<tr>
<th>Type of NTFPs</th>
<th>Buying price / kg</th>
<th>Selling price / kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

16. Did you change the prices of your product in the last period (year)?
1. Yes (If Yes), what is the reason?
________________________________________________________________________

________________________________________________________________________

2. No
99 I don’t know

17. How do you pay for NTFPs?
1. In cash
2. Bank account
98 Other, please specify ______________________

18. What are the main problems that you face during buying NTFPs?

<table>
<thead>
<tr>
<th></th>
<th>1 – strongly disagree</th>
<th>2 – disagree</th>
<th>3 – neutral</th>
<th>4 – agree</th>
<th>5 – strongly agree</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Lack of forest road</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>High price of the NTFPs</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Lack of buying points</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>
IV. Processing of NTFPs

19. After buying NTFPs what are the next operations that your company do? (possible multiple answers)
   1. Selling the NTFPs
   2. Just drying NTFPs
   3. Brining
   4. Freezing
   5. Packaging
   98 Other type of processing (specify) __________________________

20. According to your opinion which activity is the most important for the product price?

<table>
<thead>
<tr>
<th></th>
<th>1 – very unimportant</th>
<th>2 – unimportant</th>
<th>3 – neither important nor unimportant</th>
<th>4 – important</th>
<th>5 – very important</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Buying</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Transport</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Packaging</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>Marketing activities</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

21. From the list please numerate the equipment that your company have at the moment? (multiple answers)
   1. Van with refrigerator
   2. Van without refrigerator
   3. Weighing machine
   4. Drying machine
   5. Machine for processing NTFPs
   6. Packaging machine
   98 Other __________________________________________________________
V. Selling and trade with NTFPs

22. Do you export NTFPs?
   1. No
   2. Yes (if yes than in which countries and which quantities)
      99 I don’t know

<table>
<thead>
<tr>
<th>Type of NTFPs</th>
<th>Country</th>
<th>Quantities per year (in kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please, specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

23. To whom do you sell your products? (multiple answers)
   1. Own shops
   2. Shop owners (retail)
   3. Supermarkets in the country
   4. Export
   5. Other processors
   98 Other (specify) ________________________________________________

24. How stable do you think is the market of NTFP at the moment?
   Not stable at all  Not stable  Quite stable  Stable  Very stable  I don’t know
   1       2       3       4       5       99
### 25. According to your opinion evaluate the importance of the marketing tools?

<table>
<thead>
<tr>
<th></th>
<th>1 – unimportant at all</th>
<th>2 – unimportant</th>
<th>3 – neutral</th>
<th>4 – important</th>
<th>5 – very important</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Developed channels of distribution</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Familiar product/ name (brand)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Advertising</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

### 26. How often do you use the promotions marketing tools?

<table>
<thead>
<tr>
<th></th>
<th>1 – never</th>
<th>2 – once in year</th>
<th>3 – few time per year</th>
<th>4 – often</th>
<th>5 – very often</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PR</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Advertising</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Branding</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

### 27. Which marketing tool is the most successful?

____________________________________________________________________________
____________________________________________________________________________

### 28. Why are the most successful?

____________________________________________________________________________
____________________________________________________________________________

### 29. Do you have web site and e-mail address?

1. Yes  
2. No  
99 I don’t know
VI. Business environment

30. Have you ever offered training course to the pickers?
   1. Yes, how many people participated: ______  2. No  99. I don’t know

If yes than: What were the topic(s) of the training course(s)?

31. Capacity of the company and percentage of capacity utilization per year?

<table>
<thead>
<tr>
<th>Type of NTFPs</th>
<th>Capacity (kg)</th>
<th>% of utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

32. Main problems in business? (possible multiple answers)
   1. Unqualified labour
   2. Insufficient labour
   3. Lack of trainings
   4. Unfair competition
   5. Lack of export
   6. Undeveloped national market
   7. Non efficient utilization of the capacities
   8. Payments
   9. Clients
   10. Cooperation with other enterprises
   98 Other (please, specify)________________________________________

33. Can you explain your business environment?

<table>
<thead>
<tr>
<th></th>
<th>1 – strongly disagree</th>
<th>2 - disagree</th>
<th>3 – neutral</th>
<th>4 - agree</th>
<th>5 – strongly agree</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Old equipment and</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>99</td>
</tr>
<tr>
<td>mechanization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Unfair competition</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>99</td>
</tr>
<tr>
<td>3 Inadequate legal</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>99</td>
</tr>
<tr>
<td>framework (permissions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>and licences)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>98 Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>99</td>
</tr>
</tbody>
</table>
34. Do you have cooperation with other enterprises (both private and public enterprises)?
   1. Yes   2. No (Skip to 41)   99 I don’t know

35. Do you cooperate with PE MF?
   1. Yes   2. No (Skip to 43)   99 I don’t know

36. Please, evaluate and describe that cooperation?
   Very weak   Weak   Neutral   Strong   Very strong   I don’t know
   1          2       3       4       5        99

37. Do you cooperate with the MAFWE?
   1. Yes   2. No (Skip to 45)   99 I don’t know

38. Please, evaluate and describe that cooperation?
   Very weak   Weak   Neutral   Strong   Very strong   I don’t know
   1          2       3       4       5        99

39. Do you cooperate with the MoEPP?
   1. Yes   2. No (Skip to 47)   99 I don’t know

40. Please, evaluate and describe that cooperation?
   Very weak   Weak   Neutral   Strong   Very strong   I don’t know
   1          2       3       4       5        99

41. What documentation is necessary for the whole process of buying, processing, selling and export of NTFPs?
   ______________________________________________________________
   ______________________________________________________________
   ______________________________________________________________

42. Is the number of necessary documents large?
   ______________________________________________________________
   ______________________________________________________________
   ______________________________________________________________

43. According to your opinion the costs for issuing the necessary documents are?
   Very low   Low   Reasonable   High   Very high   I don’t know
   1          2       3       4       5        99
44. What is the time that you spent for collecting necessary documents?
   1. Long
   2. Reasonable
   3. Short

Thank you for your cooperation

Date: ____________________________
Place: ____________________________
Annex 2: Questionnaire for pickers

I. Socio-demographic questions or Profile

1. How old are you?

2. Gender
   1. Female
   2. Male

3. Education
   1. Primary
   2. Lower secondary
   3. Upper secondary
   4. Faculty level
   5. More than faculty level

4. How many people live in your household?

5. How many children do you have?

   99 – I do not have children

6. Employment?
   1. Yes
   2. No (skip to question 8)

7. Where?
   1. Public administration
   2. Private sector
   3. Own business
   4. Pensioners
   98 Other specify ________________________________

II. Collection

8. Which NTFPs do you collect? (multiple answers)
   1. Mushrooms
   2. Truffles
   3. Berries, nuts, fruits,
   4. Aromatic and medicinal herbs
   98 Other (please specify) ________________________________

9. How long do you collect NTFPs?
______________________________
10. How do you perceive NTFPs?
   1. Products with poor quality, bought only because of the low price
   2. Medium quality products
   3. High quality products

11. How do you collect NTFPs?

<table>
<thead>
<tr>
<th></th>
<th>1 - never</th>
<th>2 - rarely</th>
<th>3 – once in a season</th>
<th>4 - sometimes</th>
<th>5 – almost always</th>
<th>99- I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Individually</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>With family</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>With friends</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

12. Are you organized as pickers/collectors?
   1. Yes
   2. No
   99 I don’t know

13. Do you have an association at national level?
   1. Yes (if Yes, please explain How)

14. Can you tell me which equipment do you use while you collect NTFPs?

15. Have you ever been on training course for collection of NTFPs?
   1. No
   2. Yes (if Yes)
   99 I don’t know

15.a. Who was organizer of that course?

15.b. What was a topic?

16. Approximately how many days per year do you spend on NTFPs collection?

17. Approximately how many Kg on average of NTFPs do you collect?
   1. Within one season
   2. Within one day

18. What is the approximate/average distance that you travel for collecting NTFPs?
___________________________________________________________ (km)

19. How the collected NTFPs are used (average quantities)?

<table>
<thead>
<tr>
<th></th>
<th>Household consumption kg / %</th>
<th>Selling kg / %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicinal and aromatic plants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

20. What are the most important problems on the collection of NTFPs?

<table>
<thead>
<tr>
<th></th>
<th>1 – very unimportant</th>
<th>2 - unimportant</th>
<th>3 – neutral</th>
<th>4 - important</th>
<th>5 – very important</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Lack of forest road</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Too much time spent on collection</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Low price of NTFPs</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>Lack of buying points</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

III. Market condition

21. How much the NTFPs are important regarding your family budget?

1- Unimportant at all   2 - Unimportant   3 - Neither important nor unimportant
4 - Important         5 - Very important    99 – I don’t know

22. How you determinate the price of NTFPs?
______________________________________________________
23. Which factors in your opinion influence in determination the price of NTFPs?

____________________________________________________________________________________

24. What is the price for 1kg NTFPs on the market in your country (average price)?
   1. Mushrooms
   2. Medicinal and aromatic plants
   3. Berries and other fruits
   98 Other

25. What do you think are there enough buyers of NTFPs?
   1. Yes
   2. No (please explain why that number have to increase)

99 I don’t know

26. Do the companies buy all collected quantities of NTFPs offered from one picker?
   1. Yes  2. No  99. I don’t know

27. Do you sell raw NTFPs or processed NTFPs?
   1. Raw NTFPs
   2. Process NTFPs
   3. Both (if both )
   Can you tell me in % Raw _____ % Process ____

Thank you for your cooperation

Date: ____________________________
Place: ____________________________
Annex 3: Summary of findings (questionnaire for companies) from the respondents to the questions Q1 – Q44

**Socio-demographic questions or Profile**

Question 1. How old are you?

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Sum</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td>36</td>
<td>21</td>
<td>64</td>
<td>1656</td>
<td>46.00</td>
<td>9.713</td>
</tr>
</tbody>
</table>

**Descriptive Statistics**

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21-31</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
</tr>
<tr>
<td>32-42</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
</tr>
<tr>
<td>43-53</td>
<td>20</td>
<td>6.6</td>
<td>55.6</td>
</tr>
<tr>
<td>54-64</td>
<td>8</td>
<td>2.6</td>
<td>22.2</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Missing</td>
<td>System</td>
<td>268</td>
<td>88.2</td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

Question 6.a. How many, of them, are seasonally hired workers?

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Sum</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>A6_a</td>
<td>36</td>
<td>1</td>
<td>150</td>
<td>923</td>
<td>25.64</td>
<td>31.991</td>
</tr>
</tbody>
</table>

**Descriptive Statistics**

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-30</td>
<td>27</td>
<td>8.9</td>
<td>75.0</td>
</tr>
<tr>
<td>31-60</td>
<td>6</td>
<td>2.0</td>
<td>16.7</td>
</tr>
<tr>
<td>61-90</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
</tr>
<tr>
<td>91-120</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
</tr>
<tr>
<td>121-150</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Missing</td>
<td>System</td>
<td>268</td>
<td>88.2</td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>
Question 7. When your company was establish ____________ (year)?

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid 1985-1992</td>
<td>10</td>
<td>3.3</td>
<td>27.8</td>
<td>27.8</td>
</tr>
<tr>
<td>1993-2000</td>
<td>6</td>
<td>2.0</td>
<td>16.7</td>
<td>44.4</td>
</tr>
<tr>
<td>2001-2008</td>
<td>19</td>
<td>6.3</td>
<td>52.8</td>
<td>97.2</td>
</tr>
<tr>
<td>1945</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing System</td>
<td>268</td>
<td>88.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Question 9. Main company’s activities?

<table>
<thead>
<tr>
<th>Activities</th>
<th>Frequencies</th>
<th>Responses</th>
<th>Percent of Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>No.</td>
<td>Percent</td>
</tr>
<tr>
<td>activities³</td>
<td>A9_1</td>
<td>13</td>
<td>10.7%</td>
</tr>
<tr>
<td>A9_2</td>
<td>36</td>
<td>29.8%</td>
<td>100.0%</td>
</tr>
<tr>
<td>A9_3</td>
<td>34</td>
<td>28.1%</td>
<td>94.4%</td>
</tr>
<tr>
<td>A9_4</td>
<td>36</td>
<td>29.8%</td>
<td>100.0%</td>
</tr>
<tr>
<td>A9_98</td>
<td>2</td>
<td>1.7%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Total</td>
<td>121</td>
<td>100.0%</td>
<td>336.1%</td>
</tr>
</tbody>
</table>

a. Dichotomy group tabulated at value 1.

NPar Tests
Chi-Square Test
Frequencies

<table>
<thead>
<tr>
<th>Main company’s activities</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buying NTFPs</td>
<td>36</td>
<td>35.3</td>
<td>.7</td>
</tr>
<tr>
<td>Processing NTFPs</td>
<td>34</td>
<td>35.3</td>
<td>-1.3</td>
</tr>
<tr>
<td>Selling NTFPs</td>
<td>36</td>
<td>35.3</td>
<td>.7</td>
</tr>
<tr>
<td>Total</td>
<td>106</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Test Statistics

<table>
<thead>
<tr>
<th></th>
<th>vazstat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>.075^a</td>
</tr>
<tr>
<td>df</td>
<td>2</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.963</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 35.3.

Question 10. Can you tell me with which NTFPs you are dealing and in what quantities?

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Sum</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms – average quantities</td>
<td>29</td>
<td>1500</td>
<td>400000</td>
<td>2662000</td>
<td>91793.10</td>
<td>113460.465</td>
</tr>
<tr>
<td>Aromatic and medicinal herbs – average quantities</td>
<td>12</td>
<td>500</td>
<td>300000</td>
<td>3871000</td>
<td>322583.33</td>
<td>848201.489</td>
</tr>
<tr>
<td>Berries and other fruits – average quantities</td>
<td>23</td>
<td>1000</td>
<td>500000</td>
<td>1551500</td>
<td>67456.52</td>
<td>117498.541</td>
</tr>
<tr>
<td>Other – average quantities</td>
<td>17</td>
<td>2000</td>
<td>300000</td>
<td>1454500</td>
<td>85558.82</td>
<td>88092.615</td>
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</table>

Valid No. (listwise) 0

A10_1

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
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<td>80.6</td>
<td>80.6</td>
</tr>
<tr>
<td>no</td>
<td>7</td>
<td>2.3</td>
<td>19.4</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
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<tr>
<td>Missing System</td>
<td>268</td>
<td>88.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
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</tbody>
</table>

A10_2

<table>
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<tr>
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<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid yes</td>
<td>12</td>
<td>3.9</td>
<td>34.3</td>
<td>34.3</td>
</tr>
<tr>
<td>no</td>
<td>23</td>
<td>7.6</td>
<td>65.7</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>11.5</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing System</td>
<td>269</td>
<td>88.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Market potential for non–timber forest products in the Republic of Macedonia

#### Table A10_3

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td>yes</td>
<td>23</td>
<td>7.6</td>
<td>63.9</td>
</tr>
<tr>
<td></td>
<td>no</td>
<td>13</td>
<td>4.3</td>
<td>36.1</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Missing</td>
<td>System</td>
<td>268</td>
<td>88.2</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>304</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

#### Table A10_98

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td>yes</td>
<td>17</td>
<td>5.6</td>
<td>54.8</td>
</tr>
<tr>
<td></td>
<td>no</td>
<td>14</td>
<td>4.6</td>
<td>45.2</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>31</td>
<td>10.2</td>
<td>100.0</td>
</tr>
<tr>
<td>Missing</td>
<td>System</td>
<td>273</td>
<td>89.8</td>
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<tr>
<td>Total</td>
<td></td>
<td>304</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

#### Observed vs. Expected Numbers of Products

<table>
<thead>
<tr>
<th>Products</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>29</td>
<td>20.3</td>
<td>8.8</td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td>12</td>
<td>20.3</td>
<td>-8.3</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>23</td>
<td>20.3</td>
<td>2.8</td>
</tr>
<tr>
<td>Other</td>
<td>17</td>
<td>20.3</td>
<td>-3.3</td>
</tr>
<tr>
<td>Total</td>
<td>81</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Test Statistics

<table>
<thead>
<tr>
<th>product</th>
<th>value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>8.037a</td>
</tr>
<tr>
<td>Df</td>
<td>3</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.045</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 20.3.
### Market potential for non-timber forest products in the Republic of Macedonia

**Observed No.**

<table>
<thead>
<tr>
<th>Product</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms and berries and other fruits</td>
<td>52</td>
<td>40.5</td>
<td>11.5</td>
</tr>
<tr>
<td>Aromatic and medicinal plants and other NTFPs</td>
<td>29</td>
<td>40.5</td>
<td>-11.5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>81</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Test Statistics**

<table>
<thead>
<tr>
<th>VAR00001</th>
<th>Chi-square</th>
<th>df</th>
<th>Asymp. Sig.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6.531a</td>
<td>1</td>
<td>.011</td>
</tr>
</tbody>
</table>

a. 0 cells (0.0%) have expected frequencies less than 5. The minimum expected cell frequency is 40.5.

### Ranks

<table>
<thead>
<tr>
<th>Product</th>
<th>No.</th>
<th>Mean Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mushrooms</td>
<td>29</td>
<td>43.26</td>
</tr>
<tr>
<td>Aromatic and medicinal herbs</td>
<td>12</td>
<td>40.00</td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td>23</td>
<td>35.07</td>
</tr>
<tr>
<td>Other</td>
<td>17</td>
<td>45.88</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>81</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Test Statistics**

<table>
<thead>
<tr>
<th>quantity</th>
<th>Chi-square</th>
<th>Df</th>
<th>Asymp. Sig.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2.494</td>
<td>3</td>
<td>.476</td>
</tr>
</tbody>
</table>

a. Kruskal Wallis Test
b. Grouping Variable: product

### Question 11 – What type of supply of NTFPs you use? (possible multiple answers)

1. Own buying points
2. Use other buying points
3. Pickers come in our company
4. Own picker list and contact them
5. Village visit
98. Other
Frequencies

<table>
<thead>
<tr>
<th>Valid</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own buying points</td>
<td>21</td>
<td>17.8</td>
<td>17.8</td>
<td>17.8</td>
</tr>
<tr>
<td>Use other buying points</td>
<td>14</td>
<td>11.9</td>
<td>11.9</td>
<td>29.7</td>
</tr>
<tr>
<td>Pickers come in our company</td>
<td>30</td>
<td>25.4</td>
<td>25.4</td>
<td>55.1</td>
</tr>
<tr>
<td>Own picker list and contact them</td>
<td>25</td>
<td>21.2</td>
<td>21.2</td>
<td>76.3</td>
</tr>
<tr>
<td>Village visit</td>
<td>28</td>
<td>23.7</td>
<td>23.7</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>118</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

NPar Tests
Chi-Square Test
Frequencies

<table>
<thead>
<tr>
<th>Valid</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own buying points</td>
<td>21</td>
<td>23.6</td>
<td>-2.6</td>
</tr>
<tr>
<td>Use other buying points</td>
<td>14</td>
<td>23.6</td>
<td>-9.6</td>
</tr>
<tr>
<td>Pickers come in our company</td>
<td>30</td>
<td>23.6</td>
<td>6.4</td>
</tr>
<tr>
<td>Own picker list and contact them</td>
<td>25</td>
<td>23.6</td>
<td>1.4</td>
</tr>
<tr>
<td>Village visit</td>
<td>28</td>
<td>23.6</td>
<td>4.4</td>
</tr>
<tr>
<td>Total</td>
<td>118</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Test Statistics

<table>
<thead>
<tr>
<th>type of supply of NTFPs</th>
<th>Chi-square</th>
<th>df</th>
<th>Asymp. Sig.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6.831*</td>
<td>4</td>
<td>.145</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 23.6.

Question 12 – What kind of transportation means do you use when you buy the NTFPs? (possible multiple answers)
1. Van
2. Car
3. Truck
98 Other (please specify)
### Frequencies

<table>
<thead>
<tr>
<th>A12</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Van</td>
<td>25</td>
<td>38.5</td>
<td>38.5</td>
<td>38.5</td>
</tr>
<tr>
<td>Car</td>
<td>21</td>
<td>32.3</td>
<td>32.3</td>
<td>70.8</td>
</tr>
<tr>
<td>Truck</td>
<td>17</td>
<td>26.2</td>
<td>26.2</td>
<td>96.9</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>3.1</td>
<td>3.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>65</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

### NPar Tests

**Chi-Square Test**

<table>
<thead>
<tr>
<th>kind of transportation</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Van, car</td>
<td>46</td>
<td>32.5</td>
<td>13.5</td>
</tr>
<tr>
<td>Truck, other kind of transportation</td>
<td>19</td>
<td>32.5</td>
<td>-13.5</td>
</tr>
<tr>
<td>Total</td>
<td>65</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Test Statistics

<table>
<thead>
<tr>
<th>V8</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>11.215*</td>
<td></td>
</tr>
<tr>
<td>df</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.001</td>
<td></td>
</tr>
</tbody>
</table>

*a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 32.5.*

**Question 13** – What is the average distance from your company to the buying points? (km)

### Descriptives

**Descriptive Statistics**

<table>
<thead>
<tr>
<th>average distance from company to the buying points (km)</th>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Sum</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>36</td>
<td>10</td>
<td>300</td>
<td>3795</td>
<td>105.42</td>
<td>75.483</td>
</tr>
<tr>
<td><strong>Valid No. (listwise)</strong></td>
<td>36</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Market potential for non-timber forest products in the Republic of Macedonia

T-Test

One-Sample Statistics

<table>
<thead>
<tr>
<th></th>
<th>No</th>
<th>Mean</th>
<th>Std. Deviation</th>
<th>Std. Error Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>A13</td>
<td>36</td>
<td>105.42</td>
<td>75.483</td>
<td>12.580</td>
</tr>
</tbody>
</table>

One-Sample Test

Test Value = 100

<table>
<thead>
<tr>
<th></th>
<th>t</th>
<th>df</th>
<th>Sig. (2-tailed)</th>
<th>Mean Difference</th>
<th>95% Confidence Interval of the Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>A13</td>
<td>.431</td>
<td>35</td>
<td>.669</td>
<td>5.417</td>
<td>Lower -20.12 Upper 30.96</td>
</tr>
</tbody>
</table>

Question 14 – Can you tell me with how many people/companies do you cooperate, when buying NTFPs?

Descriptives

Descriptive Statistics

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Sum</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>with how many people/companies do you cooperate, when buying NTFPs</td>
<td>36</td>
<td>2</td>
<td>2000</td>
<td>4387</td>
<td>121.86</td>
<td>331.764</td>
</tr>
<tr>
<td>Valid No. (listwise)</td>
<td>36</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

T-Test

One-Sample Statistics

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Mean</th>
<th>Std. Deviation</th>
<th>Std. Error Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>A14</td>
<td>36</td>
<td>121.86</td>
<td>331.764</td>
<td>55.294</td>
</tr>
</tbody>
</table>

One-Sample Test

Test Value = 120

<table>
<thead>
<tr>
<th></th>
<th>t</th>
<th>df</th>
<th>Sig. (2-tailed)</th>
<th>Mean Difference</th>
<th>95% Confidence Interval of the Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>A14</td>
<td>.034</td>
<td>35</td>
<td>.973</td>
<td>1.861</td>
<td>Lower -110.39 Upper 114.11</td>
</tr>
</tbody>
</table>
Question 16 – Did you change the prices of your product in the last period (year)?

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid yes</td>
<td>27</td>
<td>8.9</td>
<td>75.0</td>
<td>75.0</td>
</tr>
<tr>
<td>no</td>
<td>9</td>
<td>3.0</td>
<td>25.0</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

**NPar Tests**

**Chi-Square Test**

**Frequencies**

<table>
<thead>
<tr>
<th></th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>27</td>
<td>18.0</td>
<td>9.0</td>
</tr>
<tr>
<td>No</td>
<td>9</td>
<td>18.0</td>
<td>-9.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Test Statistics**

<table>
<thead>
<tr>
<th></th>
<th>A16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>9.000*</td>
</tr>
<tr>
<td>df</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.003</td>
</tr>
</tbody>
</table>

*a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 18.0.*

**Reasons for changing the price of products**

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid Global market</td>
<td>21</td>
<td>51.2</td>
<td>51.2</td>
<td>51.2</td>
</tr>
<tr>
<td>Demand, supply</td>
<td>6</td>
<td>14.6</td>
<td>14.6</td>
<td>65.9</td>
</tr>
<tr>
<td>Quantity, quality</td>
<td>5</td>
<td>12.2</td>
<td>12.2</td>
<td>78.0</td>
</tr>
<tr>
<td>Unfair competition</td>
<td>4</td>
<td>9.8</td>
<td>9.8</td>
<td>87.8</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
<td>12.2</td>
<td>12.2</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>41</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>
NPar Tests
Chi-Square Test
Frequencies

<table>
<thead>
<tr>
<th>Stat</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global market, demand, supply</td>
<td>27</td>
<td>20.5</td>
<td>6.5</td>
</tr>
<tr>
<td>Quantity, quality, unfair competition, other conditions</td>
<td>14</td>
<td>20.5</td>
<td>-6.5</td>
</tr>
<tr>
<td>Total</td>
<td>41</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Test Statistics

<table>
<thead>
<tr>
<th>V3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>4.122a</td>
</tr>
<tr>
<td>df</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.042</td>
</tr>
</tbody>
</table>

a. 0 cells (0%) have expected frequencies less than 5. The minimum expected cell frequency is 20.5.

Question 17 – How do you pay for NTFPs?
1. In cash
2. Bank account
98. Other, please specify

Multiple Response
Paying Frequencies

<table>
<thead>
<tr>
<th>Responses</th>
<th>No.</th>
<th>Percent</th>
<th>Percent of Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>paying</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In cash</td>
<td>25</td>
<td>45.5%</td>
<td>69.4%</td>
</tr>
<tr>
<td>Bank account</td>
<td>27</td>
<td>49.1%</td>
<td>75.0%</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>5.5%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Total</td>
<td>55</td>
<td>100.0%</td>
<td>152.8%</td>
</tr>
</tbody>
</table>

a. Dichotomy group tabulated at value 1.
NPar Tests
Chi-Square Test
Frequencies

<table>
<thead>
<tr>
<th>paying</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank account</td>
<td>27</td>
<td>27.5</td>
<td>.5</td>
</tr>
<tr>
<td>In cash, other</td>
<td>28</td>
<td>27.5</td>
<td>-.5</td>
</tr>
<tr>
<td>Total</td>
<td>55</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Test Statistics

<table>
<thead>
<tr>
<th></th>
<th>paying</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>.018&lt;sup&gt;a&lt;/sup&gt;</td>
</tr>
<tr>
<td>df</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.893</td>
</tr>
</tbody>
</table>

<sup>a</sup> 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 27.5.

Question 18 – What are the main problems that you face during buying NTFPs?

<table>
<thead>
<tr>
<th>1 – strongly disagree</th>
<th>2 – disagree</th>
<th>3 – neutral</th>
<th>4 – agree</th>
<th>5 – strongly agree</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of forest road</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>High price of the NTFPs</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Lack of buying points</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Other:</td>
<td>1</td>
<td>2</td>
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### Frequencies
#### Frequency Table

**Lack of forest road**

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**High price of the NTFPs**

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**Lack of buying points**

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Problems in other

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NPar Tests

Chi-Square Test
Frequencies
Lack of forest road

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High price of the NTFPs

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<td>4.0</td>
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Lack of buying points

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Problems in other

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Test Statistics

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<th>Lack of buying points</th>
<th>Other</th>
<th>Problems in other</th>
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</thead>
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<td>10.667&lt;sup&gt;b&lt;/sup&gt;</td>
<td>26.000&lt;sup&gt;a&lt;/sup&gt;</td>
<td>11.267&lt;sup&gt;c&lt;/sup&gt;</td>
<td>5.947&lt;sup&gt;d&lt;/sup&gt;</td>
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<td>2</td>
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<td>.014</td>
<td>.000</td>
<td>.001</td>
<td>.311</td>
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</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 12.0.
b. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 9.0.
c. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 7.5.
d. 6 cells (100.0%) have expected frequencies less than 5. The minimum expected cell frequency is 3.2.

Question 19 – After buying NTFPs what are the next operations that your company do? (possible multiple answers)
1. Selling the NTFPs
2. Just drying NTFPs
3. Brining
4. Freezing
5. Packaging
98 Other type of processing (specify)
## Multiple Response

### Next operations after buying NTFPs

<table>
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<th>Responses</th>
<th>Percent</th>
<th>Cases</th>
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<td>97.2%</td>
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<td>94.4%</td>
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<td>Brining</td>
<td>30</td>
<td>21.3%</td>
<td>83.3%</td>
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<tr>
<td>Freezing</td>
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<td>50.0%</td>
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<td>Packaging</td>
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<td>58.3%</td>
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<td><strong>100.0%</strong></td>
<td><strong>391.7%</strong></td>
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a. Dichotomy group tabulated at value 1.

## NPar Tests

### Chi-Square Test

#### Frequencies

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**Test Statistics**

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</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 70.5.
Question 20 – According to your opinion which activity is the most important for the product price?

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<th>Activity</th>
<th>1 – very unimportant</th>
<th>2 – unimportant</th>
<th>3 – neither important nor unimportant</th>
<th>4 – important</th>
<th>5 – very important</th>
<th>99 – I don’t know</th>
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<td>5</td>
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**Frequencies**

**Frequency Table**

**Buying**

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### Marketing activities

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</tr>
<tr>
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<td>11</td>
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<tr>
<td>Total</td>
<td>36</td>
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<tr>
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<td></td>
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<tr>
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<td>304</td>
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### Other

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<th>Cumulative Percent</th>
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### Type of other

<table>
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<th>Percent</th>
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<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication</td>
<td>2</td>
<td>5.6</td>
<td>28.6</td>
<td>28.6</td>
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<td>Quality</td>
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<td>Competition</td>
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<td>28.6</td>
<td>100.0</td>
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<td>Total</td>
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<td>19.4</td>
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<tr>
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</table>

### NPar Tests

#### Chi-Square Test

**Frequencies**

<table>
<thead>
<tr>
<th>Type</th>
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<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buying</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unimportant</td>
<td>1</td>
<td>12.0</td>
<td>-11.0</td>
</tr>
<tr>
<td>Neither unimportant nor important</td>
<td>2</td>
<td>12.0</td>
<td>-10.0</td>
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<tr>
<td>Important</td>
<td>33</td>
<td>12.0</td>
<td>21.0</td>
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<tr>
<td>Total</td>
<td>36</td>
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<td></td>
</tr>
<tr>
<td>Transport</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Unimportant</td>
<td>3</td>
<td>12.0</td>
<td>-9.0</td>
</tr>
<tr>
<td>Neither unimportant nor important</td>
<td>5</td>
<td>12.0</td>
<td>-7.0</td>
</tr>
<tr>
<td>Important</td>
<td>28</td>
<td>12.0</td>
<td>16.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Packaging</td>
<td></td>
<td></td>
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<td>Unimportant</td>
<td>9</td>
<td>9.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Neither unimportant nor important</td>
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<td>9.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Important</td>
<td>16</td>
<td>9.0</td>
<td>7.0</td>
</tr>
<tr>
<td>I don’t know</td>
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<td>9.0</td>
<td>-8.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
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<td></td>
</tr>
<tr>
<td>Marketing activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unimportant</td>
<td>11</td>
<td>12.0</td>
<td>-1.0</td>
</tr>
<tr>
<td>Neither unimportant nor important</td>
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<td>-1.0</td>
</tr>
<tr>
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<td>14</td>
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</tr>
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<td>Total</td>
<td>36</td>
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<td></td>
</tr>
</tbody>
</table>
Other

<table>
<thead>
<tr>
<th></th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Important</td>
<td>2</td>
<td>3.5</td>
<td>-1.5</td>
</tr>
<tr>
<td>Very important</td>
<td>5</td>
<td>3.5</td>
<td>1.5</td>
</tr>
<tr>
<td>Total</td>
<td>7</td>
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</tr>
</tbody>
</table>

Type of other

<table>
<thead>
<tr>
<th></th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication</td>
<td>2</td>
<td>2.3</td>
<td>-0.3</td>
</tr>
<tr>
<td>Quality</td>
<td>3</td>
<td>2.3</td>
<td>0.7</td>
</tr>
<tr>
<td>Competition</td>
<td>2</td>
<td>2.3</td>
<td>-0.3</td>
</tr>
<tr>
<td>Total</td>
<td>7</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Test Statistics

<table>
<thead>
<tr>
<th></th>
<th>Buying</th>
<th>Transport</th>
<th>Packaging</th>
<th>Marketing activities</th>
<th>Other</th>
<th>Type of other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>55.167^a</td>
<td>32.167^a</td>
<td>12.667^b</td>
<td>.500^a</td>
<td>1.286^c</td>
<td>.286^d</td>
</tr>
<tr>
<td>df</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.000</td>
<td>.000</td>
<td>.005</td>
<td>.779</td>
<td>.257</td>
<td>.867</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 12.0.
b. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 9.0.
c. 2 cells (100.0%) have expected frequencies less than 5. The minimum expected cell frequency is 3.5.
d. 3 cells (100.0%) have expected frequencies less than 5. The minimum expected cell frequency is 2.3.

Question 21 – From the list please numerate the equipment that your company have at the moment? (multiple answers)

1. Van with refrigerator
2. Van without refrigerator
3. Weighing machine
4. Drying machine
5. Machine for processing NTFPs
6. Packaging machine
98 Other
Multiple Responses

List of equipment that company have at the moment

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Responses No.</th>
<th>Responses Percent</th>
<th>Percent of Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Van with refrigerator</td>
<td>16</td>
<td>9.0%</td>
<td>44.4%</td>
</tr>
<tr>
<td>Van without refrigerator</td>
<td>26</td>
<td>14.6%</td>
<td>72.2%</td>
</tr>
<tr>
<td>Weighing machine</td>
<td>36</td>
<td>20.2%</td>
<td>100.0%</td>
</tr>
<tr>
<td>Drying machine</td>
<td>30</td>
<td>16.9%</td>
<td>83.3%</td>
</tr>
<tr>
<td>Machine for processing NTFPs</td>
<td>31</td>
<td>17.4%</td>
<td>86.1%</td>
</tr>
<tr>
<td>Packaging machine</td>
<td>12</td>
<td>6.7%</td>
<td>33.3%</td>
</tr>
<tr>
<td>Other</td>
<td>27</td>
<td>15.2%</td>
<td>75.0%</td>
</tr>
<tr>
<td>Total</td>
<td>178</td>
<td>100.0%</td>
<td>494.4%</td>
</tr>
</tbody>
</table>

NPar Tests
Chi-Square Test
Frequencies

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Van with refrigerator</td>
<td>16</td>
<td>25.4</td>
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<tr>
<td>Van without refrigerator</td>
<td>26</td>
<td>25.4</td>
<td>.6</td>
</tr>
<tr>
<td>Weighing machine</td>
<td>36</td>
<td>25.4</td>
<td>10.6</td>
</tr>
<tr>
<td>Drying machine</td>
<td>30</td>
<td>25.4</td>
<td>4.6</td>
</tr>
<tr>
<td>Machine for processing NTFPs</td>
<td>31</td>
<td>25.4</td>
<td>5.6</td>
</tr>
<tr>
<td>Packaging machine</td>
<td>12</td>
<td>25.4</td>
<td>-13.4</td>
</tr>
<tr>
<td>Other</td>
<td>27</td>
<td>25.4</td>
<td>1.6</td>
</tr>
<tr>
<td>Total</td>
<td>178</td>
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<td></td>
</tr>
</tbody>
</table>

a. Dichotomy group tabulated at value 1.
Test Statistics

<table>
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<th>equipment</th>
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</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>17.135³</td>
</tr>
<tr>
<td>Df</td>
<td>6</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.009</td>
</tr>
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</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 25.4.

Frequencies

Other equipment that companies have

<table>
<thead>
<tr>
<th>equipment</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid</th>
<th>Cumulative Percent</th>
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</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refrigerator, refrigerated truck and freezing chamber</td>
<td>17</td>
<td>47.2</td>
<td>47.2</td>
<td>47.2</td>
</tr>
<tr>
<td>Tunnels, chambers</td>
<td>5</td>
<td>13.9</td>
<td>13.9</td>
<td>61.1</td>
</tr>
<tr>
<td>Natural dryers</td>
<td>2</td>
<td>5.6</td>
<td>5.6</td>
<td>66.7</td>
</tr>
<tr>
<td>Sewing sacks machine, baling press</td>
<td>3</td>
<td>8.3</td>
<td>8.3</td>
<td>75.0</td>
</tr>
<tr>
<td>Colour selector, selector for size</td>
<td>2</td>
<td>5.6</td>
<td>5.6</td>
<td>80.6</td>
</tr>
<tr>
<td>Machine for determining moisture</td>
<td>1</td>
<td>2.8</td>
<td>2.8</td>
<td>83.3</td>
</tr>
<tr>
<td>Trucks</td>
<td>3</td>
<td>8.3</td>
<td>8.3</td>
<td>91.7</td>
</tr>
<tr>
<td>Automobile, pickup car</td>
<td>2</td>
<td>5.6</td>
<td>5.6</td>
<td>97.2</td>
</tr>
<tr>
<td>Furnaces for heat treatment</td>
<td>1</td>
<td>2.8</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
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### NPar Tests

**Chi-Square Test**

**Frequencies**

<table>
<thead>
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<th>Other equipment that companies have</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
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<tbody>
<tr>
<td>Refrigerator, refrigerated truck and freezing chamber</td>
<td>17</td>
<td>4.0</td>
<td>13.0</td>
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<tr>
<td>Tunnels, chambers</td>
<td>5</td>
<td>4.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Natural dryers</td>
<td>2</td>
<td>4.0</td>
<td>-2.0</td>
</tr>
<tr>
<td>Sewing sacks machine, baling press</td>
<td>3</td>
<td>4.0</td>
<td>-1.0</td>
</tr>
<tr>
<td>Colour selector, selector for size</td>
<td>2</td>
<td>4.0</td>
<td>-2.0</td>
</tr>
<tr>
<td>Machine for determining moisture</td>
<td>1</td>
<td>4.0</td>
<td>-3.0</td>
</tr>
<tr>
<td>Trucks</td>
<td>3</td>
<td>4.0</td>
<td>-1.0</td>
</tr>
<tr>
<td>Automobile, pickup car</td>
<td>2</td>
<td>4.0</td>
<td>-2.0</td>
</tr>
<tr>
<td>Furnaces for heat treatment</td>
<td>1</td>
<td>4.0</td>
<td>-3.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
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<table>
<thead>
<tr>
<th><strong>Test Statistics</strong></th>
<th>stat</th>
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<tbody>
<tr>
<td>Chi-square</td>
<td>50.500(^a)</td>
</tr>
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<td>Df</td>
<td>8</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.000</td>
</tr>
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</table>

\(^a\) 9 cells (100.0\%) have expected frequencies less than 5. The minimum expected cell frequency is 4.0.

**Question 22** – Do you export NTFPs?

1. No
2. Yes (if yes than in which countries and which quantities)
99 I don’t know
Chi-Square Test Frequencies

### Country - Mushrooms

<table>
<thead>
<tr>
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<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>14</td>
<td>6.6</td>
<td>7.4</td>
</tr>
<tr>
<td>France</td>
<td>5</td>
<td>6.6</td>
<td>-1.6</td>
</tr>
<tr>
<td>Germany</td>
<td>6</td>
<td>6.6</td>
<td>-0.6</td>
</tr>
<tr>
<td>Australia</td>
<td>1</td>
<td>6.6</td>
<td>-5.6</td>
</tr>
<tr>
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</tr>
<tr>
<td>Total</td>
<td>33</td>
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<td></td>
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</table>

### Country – Aromatic and medicinal herbs

<table>
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<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>1</td>
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<td>-1.8</td>
</tr>
<tr>
<td>Ex Yu</td>
<td>3</td>
<td>2.8</td>
<td>0.2</td>
</tr>
<tr>
<td>Russia</td>
<td>1</td>
<td>2.8</td>
<td>-1.8</td>
</tr>
<tr>
<td>France</td>
<td>2</td>
<td>2.8</td>
<td>-0.8</td>
</tr>
<tr>
<td>Other</td>
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<td>2.8</td>
<td>4.2</td>
</tr>
<tr>
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</table>

### Country – Berries and other fruits

<table>
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<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>5</td>
<td>4.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Germany</td>
<td>4</td>
<td>4.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Serbia</td>
<td>5</td>
<td>4.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Other</td>
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<td>-2.0</td>
</tr>
<tr>
<td>Total</td>
<td>16</td>
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</tr>
</tbody>
</table>

### Country - Other

<table>
<thead>
<tr>
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<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>4</td>
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<td>0.7</td>
</tr>
<tr>
<td>Italy</td>
<td>3</td>
<td>3.3</td>
<td>-0.3</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>3.3</td>
<td>-0.3</td>
</tr>
<tr>
<td>Total</td>
<td>10</td>
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</tr>
</tbody>
</table>
Market potential for non–timber forest products in the Republic of Macedonia

**Test Statistics**

<table>
<thead>
<tr>
<th></th>
<th>Country - Mushrooms</th>
<th>Country – Aromatic and medicinal herbs</th>
<th>Country – Berries and other fruits</th>
<th>Country - Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>13.515&lt;sup&gt;a&lt;/sup&gt;</td>
<td>8.857&lt;sup&gt;b&lt;/sup&gt;</td>
<td>1.500&lt;sup&gt;c&lt;/sup&gt;</td>
<td>.200&lt;sup&gt;d&lt;/sup&gt;</td>
</tr>
<tr>
<td>df</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.009</td>
<td>.065</td>
<td>.682</td>
<td>.905</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 6.6.
b. 5 cells (100.0%) have expected frequencies less than 5. The minimum expected cell frequency is 2.8.
c. 4 cells (100.0%) have expected frequencies less than 5. The minimum expected cell frequency is 4.0.
d. 3 cells (100.0%) have expected frequencies less than 5. The minimum expected cell frequency is 3.3.

**Chi-Square Test**

**Frequencies**

<table>
<thead>
<tr>
<th>VAR00001</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy, France, Germany</td>
<td>25</td>
<td>16.5</td>
<td>8.5</td>
</tr>
<tr>
<td>Australia and other countries</td>
<td>8</td>
<td>16.5</td>
<td>-8.5</td>
</tr>
<tr>
<td>Total</td>
<td>33</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Test Statistics**

<table>
<thead>
<tr>
<th>VAR00001</th>
<th>Chi-square</th>
<th>Df</th>
<th>Asymp. Sig.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8.758&lt;sup&gt;a&lt;/sup&gt;</td>
<td>1</td>
<td>.003</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 16.5.
Question 23. To whom do you sell your products? (multiple answers)
1. Own shops
2. Shop owners (retail)
3. Supermarkets in the country
4. Export
5. Other processors
98 Other (specify)

Multiple Response

<table>
<thead>
<tr>
<th>To whom selling your products</th>
<th>Responses</th>
<th>Percent</th>
<th>Percent of Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own shops</td>
<td>3</td>
<td>6.5%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Shops owners (retail)</td>
<td>2</td>
<td>4.3%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Export</td>
<td>20</td>
<td>43.5%</td>
<td>55.6%</td>
</tr>
<tr>
<td>Other processors</td>
<td>21</td>
<td>45.7%</td>
<td>58.3%</td>
</tr>
<tr>
<td>Total</td>
<td>46</td>
<td>100.0%</td>
<td>127.8%</td>
</tr>
</tbody>
</table>

a. Dichotomy group tabulated at value 1.

<table>
<thead>
<tr>
<th>To whom selling your products</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>export and other processors</td>
<td>41</td>
<td>23.0</td>
<td>18.0</td>
</tr>
<tr>
<td>own shops, shops owners,</td>
<td>5</td>
<td>23.0</td>
<td>-18.0</td>
</tr>
<tr>
<td>supermarkets in the country</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>46</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Test Statistics

<table>
<thead>
<tr>
<th>stat</th>
<th>stat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>28.174 a</td>
</tr>
<tr>
<td>df</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.000</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 23.0.
Question 24 – How stable do you think is the market of NTFP at the moment?

<table>
<thead>
<tr>
<th>Stability Level</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not stable at all</td>
<td>6</td>
<td>2.0</td>
<td>16.7</td>
<td>16.7</td>
</tr>
<tr>
<td>Not stable</td>
<td>16</td>
<td>5.3</td>
<td>44.4</td>
<td>61.1</td>
</tr>
<tr>
<td>Quite stable</td>
<td>10</td>
<td>3.3</td>
<td>27.8</td>
<td>88.9</td>
</tr>
<tr>
<td>Stable</td>
<td>4</td>
<td>1.3</td>
<td>11.1</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

Missing System

<table>
<thead>
<tr>
<th>Stability Level</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not stable at all</td>
<td>268</td>
<td>88.2</td>
</tr>
<tr>
<td>Stable</td>
<td>36</td>
<td>11.8</td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
</tr>
</tbody>
</table>

### NPar Tests

**Chi-Square Test Frequencies**

<table>
<thead>
<tr>
<th>Stability Level</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not stable at all</td>
<td>6</td>
<td>9.0</td>
<td>-3.0</td>
</tr>
<tr>
<td>Not stable</td>
<td>16</td>
<td>9.0</td>
<td>7.0</td>
</tr>
<tr>
<td>Quite stable</td>
<td>10</td>
<td>9.0</td>
<td>1.0</td>
</tr>
<tr>
<td>Stable</td>
<td>4</td>
<td>9.0</td>
<td>-5.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Test Statistics**

<table>
<thead>
<tr>
<th></th>
<th>A24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>9.333*a</td>
</tr>
<tr>
<td>df</td>
<td>3</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.025</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 9.0.
**Question 25 – According to your opinion evaluate the importance of the marketing tools?**

<table>
<thead>
<tr>
<th></th>
<th>1 – unimportant at all</th>
<th>2 - unimportant</th>
<th>3 – neutral</th>
<th>4 - important</th>
<th>5 – very important</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Developed channels of distribution</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Familiar product/ name (brand)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Advertising</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

**Frequencies**

**Frequency Table**

<table>
<thead>
<tr>
<th>Developed channels of distribution</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid Unimportant at all</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>2.8</td>
</tr>
<tr>
<td>Unimportant</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
<td>11.1</td>
</tr>
<tr>
<td>Neutral</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>13.9</td>
</tr>
<tr>
<td>Important</td>
<td>14</td>
<td>4.6</td>
<td>38.9</td>
<td>52.8</td>
</tr>
<tr>
<td>Very important</td>
<td>17</td>
<td>5.6</td>
<td>47.2</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing System</td>
<td>268</td>
<td>88.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Familiar product/name (brand)</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid Unimportant at all</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>2.8</td>
</tr>
<tr>
<td>Unimportant</td>
<td>6</td>
<td>2.0</td>
<td>16.7</td>
<td>19.4</td>
</tr>
<tr>
<td>Neutral</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
<td>27.8</td>
</tr>
<tr>
<td>Important</td>
<td>14</td>
<td>4.6</td>
<td>38.9</td>
<td>66.7</td>
</tr>
<tr>
<td>Very important</td>
<td>11</td>
<td>3.6</td>
<td>30.6</td>
<td>97.2</td>
</tr>
<tr>
<td>I don’t know</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing System</td>
<td>268</td>
<td>88.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Market potential for non-timber forest products in the Republic of Macedonia

---

#### NPar Tests

**Binomial Test**

<table>
<thead>
<tr>
<th>Category</th>
<th>No.</th>
<th>Observed Prop.</th>
<th>Test Prop.</th>
<th>Asymp. Sig. (2-tailed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A25_1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group 1</td>
<td>important</td>
<td>31</td>
<td>.89</td>
<td>.50</td>
</tr>
<tr>
<td>Group 2</td>
<td>unimportant</td>
<td>4</td>
<td>.11</td>
<td>.50</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A25_2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group 1</td>
<td>important</td>
<td>25</td>
<td>.78</td>
<td>.50</td>
</tr>
<tr>
<td>Group 2</td>
<td>unimportant</td>
<td>7</td>
<td>.22</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>32</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A25_3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group 1</td>
<td>unimportant</td>
<td>15</td>
<td>.43</td>
<td>.50</td>
</tr>
<tr>
<td>Group 2</td>
<td>important</td>
<td>20</td>
<td>.57</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a. Based on Z Approximation.

#### Question 26 – How often do you use the promotions marketing tools?

<table>
<thead>
<tr>
<th>Category</th>
<th>1 – never</th>
<th>2 – once in year</th>
<th>3 – few time per year</th>
<th>4 - often</th>
<th>5 – very often</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PR</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Advertising</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Branding</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>
### Frequencies

#### Frequency Table

<table>
<thead>
<tr>
<th>PR</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid Never</td>
<td>25</td>
<td>8.2</td>
<td>69.4</td>
<td>69.4</td>
</tr>
<tr>
<td>Once in year</td>
<td>4</td>
<td>1.3</td>
<td>11.1</td>
<td>80.6</td>
</tr>
<tr>
<td>Few time per year</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
<td>94.4</td>
</tr>
<tr>
<td>Often</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>97.2</td>
</tr>
<tr>
<td>Very often</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing System</td>
<td>268</td>
<td>88.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Advertising

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid Never</td>
<td>24</td>
<td>7.9</td>
<td>66.7</td>
<td>66.7</td>
</tr>
<tr>
<td>Once in year</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
<td>80.6</td>
</tr>
<tr>
<td>Few time per year</td>
<td>6</td>
<td>2.0</td>
<td>16.7</td>
<td>97.2</td>
</tr>
<tr>
<td>Very often</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing System</td>
<td>268</td>
<td>88.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Branding

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid Never</td>
<td>32</td>
<td>10.5</td>
<td>88.9</td>
<td>88.9</td>
</tr>
<tr>
<td>Once in year</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>91.7</td>
</tr>
<tr>
<td>Few time per year</td>
<td>1</td>
<td>.3</td>
<td>2.8</td>
<td>94.4</td>
</tr>
<tr>
<td>Very often</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing System</td>
<td>268</td>
<td>88.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### NPar Tests

#### Chi-Square Test

#### Frequencies

<table>
<thead>
<tr>
<th></th>
<th>PR</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td></td>
<td>25</td>
<td>18.0</td>
<td>7.0</td>
</tr>
<tr>
<td>once in year, few time per year, often, very often</td>
<td></td>
<td>11</td>
<td>18.0</td>
<td>-7.0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>36</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Advertising</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>never</td>
<td></td>
<td>24</td>
<td>18.0</td>
<td>6.0</td>
</tr>
<tr>
<td>once in year, few time per year, often, very often</td>
<td></td>
<td>12</td>
<td>18.0</td>
<td>-6.0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>36</td>
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<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Branding</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>never</td>
<td></td>
<td>32</td>
<td>18.0</td>
<td>14.0</td>
</tr>
<tr>
<td>once in year, few time per year, often, very often</td>
<td></td>
<td>4</td>
<td>18.0</td>
<td>-14.0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>36</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Test Statistics

<table>
<thead>
<tr>
<th></th>
<th>A26_1</th>
<th>A26_2</th>
<th>A26_3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>5.444*</td>
<td>4.000*</td>
<td>21.778*</td>
</tr>
<tr>
<td>df</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.020</td>
<td>.046</td>
<td>.000</td>
</tr>
</tbody>
</table>

* a. 0 cells (.0%) have expected frequencies less than 5.
The minimum expected cell frequency is 18.0.
Question 27 – Which marketing tool is the most successful?

**Frequencies**

**Frequency Table**

<table>
<thead>
<tr>
<th>Which marketing tool is the most successful</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PR</td>
<td>8</td>
<td>15.7</td>
<td>15.7</td>
<td>15.7</td>
</tr>
<tr>
<td>advertising</td>
<td>13</td>
<td>25.5</td>
<td>25.5</td>
<td>41.2</td>
</tr>
<tr>
<td>distribution channels</td>
<td>8</td>
<td>15.7</td>
<td>15.7</td>
<td>56.9</td>
</tr>
<tr>
<td>branding</td>
<td>10</td>
<td>19.6</td>
<td>19.6</td>
<td>76.5</td>
</tr>
<tr>
<td>promotion</td>
<td>5</td>
<td>9.8</td>
<td>9.8</td>
<td>86.3</td>
</tr>
<tr>
<td>other (quality, internet, direct communication)</td>
<td>7</td>
<td>13.7</td>
<td>13.7</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>51</td>
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<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

**NPar Tests**

**Chi-Square Test**

**Frequencies**

V3

<table>
<thead>
<tr>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>advertising, branding</td>
<td>23</td>
<td>25.5</td>
</tr>
<tr>
<td>PR, distribution channels, promotion, other</td>
<td>28</td>
<td>25.5</td>
</tr>
<tr>
<td>Total</td>
<td>51</td>
<td></td>
</tr>
</tbody>
</table>

**Test Statistics**

<table>
<thead>
<tr>
<th></th>
<th>V3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>.490a</td>
</tr>
<tr>
<td>df</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.484</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 25.5.
Question 28 – Why are the most successful?

### Frequencies

#### Frequency Table

<table>
<thead>
<tr>
<th>Valid</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>promotion of company, products, quality</td>
<td>11</td>
<td>21.6</td>
<td>25.6</td>
<td>25.6</td>
</tr>
<tr>
<td>communication and cooperation</td>
<td>6</td>
<td>11.8</td>
<td>14.0</td>
<td>39.5</td>
</tr>
<tr>
<td>better sales of products, quality products</td>
<td>11</td>
<td>21.6</td>
<td>25.6</td>
<td>65.1</td>
</tr>
<tr>
<td>reliable buyer, more customers</td>
<td>6</td>
<td>11.8</td>
<td>14.0</td>
<td>79.1</td>
</tr>
<tr>
<td>increase production, higher profit, greater profitability and efficiency</td>
<td>3</td>
<td>5.9</td>
<td>7.0</td>
<td>86.0</td>
</tr>
<tr>
<td>greater trust and norms of behaviour</td>
<td>2</td>
<td>3.9</td>
<td>4.7</td>
<td>90.7</td>
</tr>
<tr>
<td>other (better marketing of the products, familiar with working conditions, better disposal of goods, familiarization the needs of the market)</td>
<td>4</td>
<td>7.8</td>
<td>9.3</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>43</td>
<td>84.3</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing System</td>
<td>8</td>
<td>15.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>51</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### NPar Tests

#### Chi-Square Test Frequencies

<table>
<thead>
<tr>
<th>promotion of company, products, quality, better sales of products, quality products</th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>promotion of company, products, quality, better sales of products, quality products</td>
<td>22</td>
<td>21.5</td>
<td>.5</td>
</tr>
<tr>
<td>communication, cooperation, reliable buyers, more customers, increase production, higher profit, profitability, efficiency, greater trust and norms, other</td>
<td>21</td>
<td>21.5</td>
<td>-.5</td>
</tr>
<tr>
<td>Total</td>
<td>43</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Question 29 – Do you have web site and e-mail address?

**Frequencies**

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. yes</td>
<td>34</td>
<td>11.2</td>
<td>94.4</td>
<td>94.4</td>
</tr>
<tr>
<td>2. no</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>11.8</td>
<td></td>
<td>100.0</td>
</tr>
<tr>
<td>Missing</td>
<td>System</td>
<td>268</td>
<td>88.2</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>304</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NPar Tests**

**Binomial Test**

<table>
<thead>
<tr>
<th>Category</th>
<th>No.</th>
<th>Observed Prop.</th>
<th>Test Prop.</th>
<th>Asymp. Sig. (2-tailed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A29 Group 1 Yes</td>
<td>34</td>
<td>.94</td>
<td>.50</td>
<td>.000a</td>
</tr>
<tr>
<td>Group 2 No</td>
<td>2</td>
<td>.06</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td>1.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a. Based on Z Approximation.

Question 30 – Have you ever offered training course to the pickers?

1. Yes, how many people participated: ________
2. No  99  I don’t know

**Descriptives**

**Descriptive Statistics**

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Sum</th>
<th>Mean</th>
<th>Std. Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>A30_1</td>
<td>21</td>
<td>10</td>
<td>1500</td>
<td>2545</td>
<td>121.19</td>
<td>318.162</td>
</tr>
<tr>
<td>Valid N (listwise)</td>
<td>21</td>
<td>10</td>
<td>1500</td>
<td>2545</td>
<td>121.19</td>
<td>318.162</td>
</tr>
</tbody>
</table>
Frequencies

Have you ever offered training course to the pickers?

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td>yes</td>
<td>21</td>
<td>6.9</td>
<td>58.3</td>
</tr>
<tr>
<td></td>
<td>no</td>
<td>15</td>
<td>4.9</td>
<td>41.7</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
</tr>
<tr>
<td>Missing</td>
<td>System</td>
<td>268</td>
<td>88.2</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>304</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

NPar Tests
Chi-Square Test
Frequencies

<table>
<thead>
<tr>
<th></th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>yes</td>
<td>21</td>
<td>18.0</td>
<td>3.0</td>
</tr>
<tr>
<td>no</td>
<td>15</td>
<td>18.0</td>
<td>-3.0</td>
</tr>
<tr>
<td>Total</td>
<td>36</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Test Statistics

<table>
<thead>
<tr>
<th></th>
<th>A30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>1.000(^a)</td>
</tr>
<tr>
<td>Df</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.317</td>
</tr>
</tbody>
</table>

a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 18.0.

T-Test
One-Sample Statistics

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Mean</th>
<th>Std. Deviation</th>
<th>Std. Error Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>A30_1</td>
<td>21</td>
<td>121.19</td>
<td>318.162</td>
<td>69.429</td>
</tr>
</tbody>
</table>

One-Sample Test

<table>
<thead>
<tr>
<th></th>
<th>t</th>
<th>df</th>
<th>Sig. (2-tailed)</th>
<th>Mean Difference</th>
<th>95% Confidence Interval of the Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>A30_1</td>
<td>.017</td>
<td>20</td>
<td>.986</td>
<td>1.190</td>
<td>-143.64 - 146.02</td>
</tr>
</tbody>
</table>
Question 31. Capacity of the company and percentage of capacity utilization per year?

### Descriptive Statistics

<table>
<thead>
<tr>
<th></th>
<th>No.</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Sum</th>
<th>Mean</th>
<th>Std. Dev</th>
</tr>
</thead>
<tbody>
<tr>
<td>A31_1_C</td>
<td>29</td>
<td>3300</td>
<td>1000000</td>
<td>7536600</td>
<td>259882.76</td>
<td>323624.307</td>
</tr>
<tr>
<td>A31_1_P</td>
<td>29</td>
<td>10</td>
<td>100</td>
<td>1410</td>
<td>48.62</td>
<td>30.790</td>
</tr>
<tr>
<td>A31_2_C</td>
<td>9</td>
<td>700</td>
<td>800000</td>
<td>2419200</td>
<td>268800.00</td>
<td>367661.832</td>
</tr>
<tr>
<td>A31_2_P</td>
<td>10</td>
<td>100</td>
<td>100</td>
<td>509</td>
<td>50.90</td>
<td>37.628</td>
</tr>
<tr>
<td>A31_3_C</td>
<td>25</td>
<td>1000</td>
<td>500000</td>
<td>3237900</td>
<td>129516.00</td>
<td>168418.981</td>
</tr>
<tr>
<td>A31_3_P</td>
<td>25</td>
<td>100</td>
<td>100</td>
<td>1420</td>
<td>56.80</td>
<td>27.609</td>
</tr>
</tbody>
</table>

Valid No. (listwise) 2

### T-Test

**One-Sample Test**

<table>
<thead>
<tr>
<th></th>
<th>t</th>
<th>df</th>
<th>Sig. (2-tailed)</th>
<th>Mean Difference</th>
<th>95% Confidence Interval of the Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>Lower</td>
</tr>
<tr>
<td>A31_1_P</td>
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<td>28</td>
<td>.811</td>
<td>-1.379</td>
<td>-13.09</td>
</tr>
<tr>
<td>A31_2_P</td>
<td>.076</td>
<td>9</td>
<td>.941</td>
<td>.900</td>
<td>-26.02</td>
</tr>
<tr>
<td>A31_3_P</td>
<td>1.231</td>
<td>24</td>
<td>.230</td>
<td>6.800</td>
<td>-4.60</td>
</tr>
</tbody>
</table>

Question 32 – Main problems in business? (possible multiple answers)

1. Unqualified labour
2. Insufficient labour
3. Lack of trainings
4. Unfair competition
5. Lack of export
6. Undeveloped national market
7. Non efficient utilization of the capacities
8. Payments
9. Clients
10. Cooperation with other enterprises
98 Other (please, specify)
### Multiple Response

**Main problems in business Frequencies**

<table>
<thead>
<tr>
<th>Main problemsa</th>
<th>Responses</th>
<th>Percent</th>
<th>Percent of Cases</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Unqualified labour</td>
<td>11</td>
<td>10.1%</td>
<td>30.6%</td>
</tr>
<tr>
<td>2. Insufficient labour</td>
<td>15</td>
<td>13.8%</td>
<td>41.7%</td>
</tr>
<tr>
<td>3. Lack of trainings</td>
<td>8</td>
<td>7.3%</td>
<td>22.2%</td>
</tr>
<tr>
<td>4. Unfair competition</td>
<td>31</td>
<td>28.4%</td>
<td>86.1%</td>
</tr>
<tr>
<td>5. Lack of export</td>
<td>6</td>
<td>5.5%</td>
<td>16.7%</td>
</tr>
<tr>
<td>6. Undeveloped national market</td>
<td>10</td>
<td>9.2%</td>
<td>27.8%</td>
</tr>
<tr>
<td>7. Non efficient utilization of the capacities</td>
<td>4</td>
<td>3.7%</td>
<td>11.1%</td>
</tr>
<tr>
<td>8. Payments</td>
<td>15</td>
<td>13.8%</td>
<td>41.7%</td>
</tr>
<tr>
<td>9. Clients</td>
<td>3</td>
<td>2.8%</td>
<td>8.3%</td>
</tr>
<tr>
<td>10. Cooperation with other enterprises</td>
<td>3</td>
<td>2.8%</td>
<td>8.3%</td>
</tr>
<tr>
<td>98 Other</td>
<td>3</td>
<td>2.8%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Total</td>
<td>109</td>
<td>100.0%</td>
<td>302.8%</td>
</tr>
</tbody>
</table>

a. Dichotomy group tabulated at value 1.

### Frequency of other

<table>
<thead>
<tr>
<th>Frequency of other</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>process of transaction of money</td>
<td>2</td>
<td>1.8</td>
<td>66.7</td>
<td>66.7</td>
</tr>
<tr>
<td>dictate the price</td>
<td>1</td>
<td>.9</td>
<td>33.3</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>3</td>
<td>2.8</td>
<td>100.0</td>
<td></td>
</tr>
<tr>
<td>Missing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System</td>
<td>106</td>
<td>97.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>109</td>
<td>100.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### NPar Tests
#### Chi-Square Test
#### Frequencies

**Main problems in business**

<table>
<thead>
<tr>
<th></th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Insufficient labour, unfair competition, payments</td>
<td>61</td>
<td>54.5</td>
<td>6.5</td>
</tr>
<tr>
<td>2. Unqualified labour, lack of trainings, lack of export, undeveloped national market, non efficient utilization of the capacities, clients, cooperation with other enterprises, other</td>
<td>48</td>
<td>54.5</td>
<td>-6.5</td>
</tr>
<tr>
<td>Total</td>
<td>109</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Test Statistics**

<table>
<thead>
<tr>
<th></th>
<th>problems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>1.550^a</td>
</tr>
<tr>
<td>df</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.213</td>
</tr>
</tbody>
</table>

^a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 54.5.

### NPar Tests
#### Chi-Square Test
#### Frequencies

<table>
<thead>
<tr>
<th></th>
<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
</thead>
<tbody>
<tr>
<td>process of transaction of money</td>
<td>2</td>
<td>1.5</td>
<td>.5</td>
</tr>
<tr>
<td>dictate the price</td>
<td>1</td>
<td>1.5</td>
<td>-.5</td>
</tr>
<tr>
<td>Total</td>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Test Statistics**

<table>
<thead>
<tr>
<th></th>
<th>a98afrek</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chi-square</td>
<td>.333^a</td>
</tr>
<tr>
<td>df</td>
<td>1</td>
</tr>
<tr>
<td>Asymp. Sig.</td>
<td>.564</td>
</tr>
</tbody>
</table>

^a. 2 cells (100.0%) have expected frequencies less than 5. The minimum expected cell frequency is 1.5.
Question 33 – Can you explain your business environment?

<table>
<thead>
<tr>
<th></th>
<th>1 – strongly disagree</th>
<th>2 – disagree</th>
<th>3 – neutral</th>
<th>4 – agree</th>
<th>5 – strongly agree</th>
<th>99 – I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Old equipment and mechanization</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Unfair competition</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Inadequate legal framework (permissions and licences)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>98</td>
<td>Other:</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

### Frequencies

**Frequency Table**

#### Old equipment and mechanization

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agree</td>
<td>8</td>
<td>2.6</td>
<td>22.2</td>
<td>22.2</td>
</tr>
<tr>
<td>Neutral</td>
<td>3</td>
<td>1.0</td>
<td>8.3</td>
<td>30.6</td>
</tr>
<tr>
<td>Disagree</td>
<td>9</td>
<td>3.0</td>
<td>25.0</td>
<td>55.6</td>
</tr>
<tr>
<td>Strongly disagree</td>
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#### Unfair competition

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Inadequate legal framework (permissions and licences)

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**NPar Test**

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a. Based on Z Approximation.

Question 34 – Do you have cooperation with other enterprises (both private and public enterprises)?

1. Yes  
2. No (Skip to 41)  
99 I don’t know

**Frequencies**

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Question 35 – Do you cooperate with PE MF?
1. Yes
2. No (Skip to 37)
99 I don’t know

Frequencies
Frequency Table

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NPar Tests
Binomial Test

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a. Based on Z Approximation.

Question 36 - Please, evaluate and describe that cooperation?
Very weak Weak Neutral Strong Very strong I don’t know
1 2 3 4 5 99
### Frequencies Table

#### Frequency Table

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<td>2.0</td>
<td>26.1</td>
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<tr>
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<td>strong</td>
<td>3</td>
<td>1.0</td>
<td>13.0</td>
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### NPar Tests

#### Binomial Test

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### Frequencies Table

#### Frequency Table

Describe cooperation frek36a

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<tr>
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<td>14</td>
<td>34.1</td>
<td>63.6</td>
</tr>
<tr>
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<td>2. agreement for pickers</td>
<td>2</td>
<td>4.9</td>
<td>9.1</td>
</tr>
<tr>
<td></td>
<td>3. mutual production of essential oils</td>
<td>2</td>
<td>4.9</td>
<td>9.1</td>
</tr>
<tr>
<td></td>
<td>4. other (problems at buying, only requirements from their side</td>
<td>4</td>
<td>9.8</td>
<td>18.2</td>
</tr>
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**NPar Tests**

**Binomial Test**

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<td>.286</td>
</tr>
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<td>Permits for buying points, collecting, use</td>
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**Question 37 – Do you cooperate with the MAFWE?**
1. Yes
2. No (Skip to 39)
99 I don’t know

**Frequencies**

**Frequency Table**

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**NPar Tests**

**Binomial Test**

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a. Based on Z Approximation.

**Question 38 - Please, evaluate and describe that cooperation?**

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<th>Weak</th>
<th>Neutral</th>
<th>Strong</th>
<th>Very strong</th>
<th>I don’t know</th>
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<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
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## Frequencies
### Frequency Table

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<tr>
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<td>2</td>
<td>.7</td>
<td>14.3</td>
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<tr>
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<td>neutral</td>
<td>7</td>
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## NPar Tests
### Binomial Test

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## Frequencies
### Frequency Table

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<td>2. certificate for organic production, phytosanitary certificate</td>
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<td>7.3</td>
<td>18.8</td>
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<tr>
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<td>3. rulebook for NTFPs, rules and ensuring of buying points</td>
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<td>7.3</td>
<td>18.8</td>
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<td>4. request for protection of environment and land concession, concessions</td>
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<tr>
<td></td>
<td>5. other (subsidies, plantation works)</td>
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<td>4.9</td>
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Market potential for non–timber forest products in the Republic of Macedonia

NPar Tests
Binomial Test

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Question 39 – Do you cooperate with the MoEPP?
1. Yes 2. No (Skip to 41) 99 I don’t know

Frequencies
Frequency Table

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NPar Tests
Binomial Test

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a. Based on Z Approximation.
Question 40 – Please, evaluate and describe that cooperation?

<table>
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<th></th>
<th>Very weak</th>
<th>Weak</th>
<th>Neutral</th>
<th>Strong</th>
<th>Very strong</th>
<th>I don’t know</th>
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</table>

Frequencies

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<th>Cumulative Percent</th>
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<td></td>
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<td>43.8</td>
<td>56.3</td>
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Missing System

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NPar Tests

Binomial Test

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<th>Observed Prop.</th>
<th>Test Prop.</th>
<th>Exact Sig. (2-tailed)</th>
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</thead>
<tbody>
<tr>
<td>A40 Group 1</td>
<td>strong</td>
<td>14</td>
<td>.78</td>
<td>.50</td>
</tr>
<tr>
<td>Group 2</td>
<td>weak</td>
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<td>.22</td>
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Frequencies

Describe cooperation frek46a

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</thead>
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<td></td>
</tr>
<tr>
<td>1. permits for export, import, buying, collecting</td>
<td>32</td>
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<td>78.0</td>
<td>78.0</td>
</tr>
<tr>
<td>2. phytosanitary certificate</td>
<td>3</td>
<td>7.3</td>
<td>7.3</td>
<td>85.4</td>
</tr>
<tr>
<td>3. information about biodiversity, workshops</td>
<td>3</td>
<td>7.3</td>
<td>7.3</td>
<td>92.7</td>
</tr>
<tr>
<td>4. request for protection of environment and land concession, environmental fee</td>
<td>3</td>
<td>7.3</td>
<td>7.3</td>
<td>100.0</td>
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### NPar Tests
#### Binomial Test

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<th>Test Prop.</th>
<th>Asymp. Sig. (2-tailed)</th>
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</thead>
<tbody>
<tr>
<td>stat40a Group 1 - permits for export, import, buying, collection</td>
<td>32</td>
<td>.78</td>
<td>.50</td>
<td>.000(^a)</td>
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<td>.22</td>
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<tr>
<td>Total</td>
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\(^a\) Based on Z Approximation.

Question 42 – Is the number of necessary documents large?

### Frequencies

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<th>Is the number of necessary documents large</th>
<th>Frequency</th>
<th>Percent</th>
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<th>Cumulative Percent</th>
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<tr>
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<td>16.7</td>
<td>16.7</td>
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<td></td>
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<td>29</td>
<td>80.6</td>
<td>97.2</td>
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<td>I don't know</td>
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<td>2.8</td>
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### NPar Tests
#### Chi-Square Test
#### Frequencies

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Test Statistics

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a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 12.0.

Question 43 – According to your opinion the costs for issuing the necessary documents are?

<table>
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<tr>
<th></th>
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<th>Low</th>
<th>Reasonable</th>
<th>High</th>
<th>Very high,</th>
<th>I don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequency</td>
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<td>2</td>
<td>3</td>
<td>4</td>
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Frequencies

<table>
<thead>
<tr>
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<th>Percent</th>
<th>Valid Percent</th>
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</tr>
</thead>
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<tr>
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<td>27</td>
<td>8.9</td>
<td>75.0</td>
</tr>
<tr>
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<td>high</td>
<td>5</td>
<td>1.6</td>
<td>13.9</td>
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<tr>
<td></td>
<td>very high</td>
<td>2</td>
<td>.7</td>
<td>5.6</td>
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<tr>
<td>Total</td>
<td></td>
<td>36</td>
<td>11.8</td>
<td>100.0</td>
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</table>

|        | System    | 268     | 88.2          |                    |
| Total  |           | 304     | 100.0         |                    |

NPar Tests

Binomial Test

<table>
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<tr>
<th></th>
<th>Category</th>
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<th>Observed Prop.</th>
<th>Test Prop.</th>
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</thead>
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<td>Group 1</td>
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<td>.50</td>
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<td>Group 2</td>
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<tr>
<td></td>
<td>low, high, very high</td>
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<td>.25</td>
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</tbody>
</table>

a. Based on Z Approximation.

Question 44 – What is the time that you spent for collecting necessary documents?

1. Long
2. Reasonable
3. Short
### Frequencies

**A44**

<table>
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<tr>
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<td>System</td>
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### NPar Tests

**Binomial Test**

<table>
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<th>Category</th>
<th>No.</th>
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* Based on Z Approximation.

### CORRELATION Table

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<th>A36_1_C</th>
<th>A36_1_P</th>
<th>A36_2_C</th>
<th>A36_2_P</th>
<th>A36_3_C</th>
<th>A36_3_P</th>
</tr>
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<td>A36_1_C</td>
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<td>-.372*</td>
<td>1.00</td>
<td>-.111*</td>
<td>.829*</td>
<td>-.196</td>
</tr>
<tr>
<td>A36_1_P</td>
<td>-.372*</td>
<td>1.00</td>
<td>-.111*</td>
<td>1.00</td>
<td>-.263</td>
<td>.807**</td>
</tr>
<tr>
<td>A36_2_C</td>
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<td>-.111*</td>
<td>1.00</td>
<td>-.536*</td>
<td>1.00</td>
<td>1.00</td>
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<td>A36_2_P</td>
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<tr>
<td>Sig. (2-tailed)</td>
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### Spearman's rho Correlation

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<td>-0.111</td>
<td>1.000**</td>
<td>-0.263</td>
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<td>.137</td>
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<td>-0.536</td>
<td>1.000</td>
<td>-1.000**</td>
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<td>Correlation</td>
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<td>-0.263</td>
<td>1.000**</td>
<td>-1.000**</td>
<td>1.000</td>
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<tr>
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<td>Sig. (2-tailed)</td>
<td>.000</td>
<td>.250</td>
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<tr>
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<td>No.</td>
<td>21</td>
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<td>3</td>
<td>4</td>
<td>25</td>
</tr>
<tr>
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<td>Correlation</td>
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<td>0.807**</td>
<td>1.000**</td>
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<td>Sig. (2-tailed)</td>
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<td>.801</td>
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<td>.025</td>
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</table>

Vaska Nedanovska  
Page 144
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Annex 4: Summary of findings (questionnaire for pickers) from the respondents to the questions Q1 – Q27

Socio-demographic questions or Profile

Question 1. How old are you?

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<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>0-20</td>
<td>5</td>
<td>3.6</td>
<td>3.6</td>
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<tr>
<td>21-40</td>
<td>25</td>
<td>18.1</td>
<td>21.7</td>
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<tr>
<td>41-60</td>
<td>75</td>
<td>54.3</td>
<td>76.1</td>
</tr>
<tr>
<td>over 60</td>
<td>33</td>
<td>23.9</td>
<td>100.0</td>
</tr>
<tr>
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<td>138</td>
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<td>100.0</td>
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Descriptive Statistics

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Question 4. How many people live in your household?

Statistics

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<td>2.2</td>
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<tr>
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<td>5</td>
<td>3</td>
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<td>80.4</td>
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<tr>
<td>6</td>
<td>15</td>
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Question 5. How many children do you have?

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A5

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<td>2</td>
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Missing System

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A5_99

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<tr>
<td>Total</td>
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</table>
Question 6. Employment?
1. Yes  2. No

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<th>Cumulative Percent</th>
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</thead>
<tbody>
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<tr>
<td>yes</td>
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<td>47.8</td>
<td>47.8</td>
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<tr>
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<td>72</td>
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<tr>
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<td>138</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
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</tbody>
</table>

Question 7. Where?
1. Public administration
2. Private sector
3. Own business
4. Pensioners
98 Other

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
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Question 8. Which NTFPs do you collect? (multiple answers)
1. Mushrooms
2. Truffles
3. Berries, nuts, fruits,
4. Aromatic and medicinal herbs
98 Other

```
<table>
<thead>
<tr>
<th></th>
<th>Products Frequencies</th>
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<td>A8_3</td>
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<td>A8_4</td>
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<td>19.8%</td>
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<tr>
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Market potential for non–timber forest products in the Republic of Macedonia

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<td>A8_98</td>
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a. Dichotomy group tabulated at value 1.

NPar Tests
Chi-Square Test Frequencies

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<th>Residual</th>
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<td>-37.5</td>
</tr>
<tr>
<td>Berries, nuts, fruits, aromatic and medicinal plants</td>
<td>189</td>
<td>151.5</td>
<td>37.5</td>
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Test Statistics

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a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 151.5.

Question 9. How long do you collect NTFPs?

Descriptive Statistics

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Question 10. How do you perceive NTFPs?

1. Products with poor quality, bought only because of the low price
2. Medium quality products
3. High quality products
Frequencies

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<th>Frequency</th>
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<th>Valid Percent</th>
<th>Cumulative Percent</th>
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<tr>
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NPar Tests

Chi-Square Test Frequencies

<table>
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<th>Observed No.</th>
<th>Expected No.</th>
<th>Residual</th>
</tr>
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<td>72</td>
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<td>medium quality products and products with poor quality</td>
<td>66</td>
<td>69.0</td>
<td>-3.0</td>
</tr>
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Test Statistics

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a. 0 cells (.0%) have expected frequencies less than 5. The minimum expected cell frequency is 69.0.

Question 11. How do you collect NTFPs?

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<th>1 - never</th>
<th>2 - rarely</th>
<th>3 – once in a season</th>
<th>4 - sometimes</th>
<th>5 – almost always</th>
<th>99 - I don’t know</th>
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<td>1 Individually</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>99</td>
</tr>
<tr>
<td>2 With family</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>99</td>
</tr>
<tr>
<td>3 With friends</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>99</td>
</tr>
<tr>
<td>98 Other</td>
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<td>2</td>
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## Frequencies

### Statistics

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### A11_1

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<th>Cumulative Percent</th>
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<td>54</td>
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<td>45.7</td>
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### A11_3

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Question 12. Are you organized as pickers/collectors?
1. Yes  
2. No  
99 I don’t know

### Frequencies

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<td></td>
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Question 13. Do you have an association at national level?
1. Yes (if Yes, please explain How)  
2. No  
99 I don’t know

### Frequencies

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Question 14. Can you tell me which equipment do you use while you collect NTFPs?

### Frequencies

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<tbody>
<tr>
<td>basket; gloves</td>
<td>6</td>
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<td>4.3</td>
<td>4.3</td>
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<td>basket; stick</td>
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<td>8.7</td>
<td>13.0</td>
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<tr>
<td>comb; gloves</td>
<td>3</td>
<td>2.2</td>
<td>2.2</td>
<td>15.2</td>
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<tr>
<td>comb; gloves; sickle</td>
<td>3</td>
<td>2.2</td>
<td>2.2</td>
<td>17.4</td>
</tr>
<tr>
<td>comb; sickle; gloves</td>
<td>3</td>
<td>2.2</td>
<td>2.2</td>
<td>19.6</td>
</tr>
<tr>
<td>gloves; basket</td>
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<td>2.2</td>
<td>2.2</td>
<td>21.7</td>
</tr>
<tr>
<td>gloves; knife</td>
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<td>2.2</td>
<td>2.2</td>
<td>23.9</td>
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<tr>
<td>gloves; rakes; sieve</td>
<td>3</td>
<td>2.2</td>
<td>2.2</td>
<td>26.1</td>
</tr>
<tr>
<td>gloves; scissors; sieves</td>
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<td>2.2</td>
<td>2.2</td>
<td>28.3</td>
</tr>
<tr>
<td>gloves; sieve</td>
<td>6</td>
<td>4.3</td>
<td>4.3</td>
<td>32.6</td>
</tr>
<tr>
<td>gloves; sieve; boots</td>
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<td>2.2</td>
<td>34.8</td>
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<tr>
<td>I don’t use</td>
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<td>2.2</td>
<td>37.0</td>
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</table>
Question 15. Have you ever been on training course for collection of NTFPs?

1. No
2. Yes (if Yes) 99 I don’t know
15.a. Who was organizer of that course?
15.b. What was a topic?

**Frequencies**

<table>
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<th>A15</th>
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Question 16. Approximately how many days per year do you spend on NTFPs collection?

**Descriptive Statistics**

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</table>
Question 17. Approximately how many Kg on average of NTFPs do you collect?
1. Within one season _______________ kg
2. Within one day ________________ kg

**Frequencies**

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**T-Test**

**One-Sample Statistics**

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**One-Sample Test**

Test Value = 460

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<th>Mean Difference</th>
<th>95% Confidence Interval of the Difference</th>
</tr>
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<tbody>
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<td>A17_1</td>
<td>.051</td>
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<td>.960</td>
<td>-57.92, 60.96</td>
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**T-Test**

**One-Sample Statistics**

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<td>14.02</td>
<td>10.088</td>
<td>.859</td>
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</table>
Question 18. What is the approximate/average distance that you travel for collecting NTFPs? (km)

Descriptive Statistics

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T-Test

One-Sample Statistics

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One-Sample Test

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<th>Upper</th>
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One-Sample Test

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<th>Upper</th>
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Question 19. How the collected NTFPs are used (average quantities)?

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<th>Household consumption Kg / %</th>
<th>Selling kg / %</th>
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<tbody>
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<td>Mushrooms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicinal and aromatic plants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berries and other fruits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
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</tbody>
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### Frequencies

#### Statistics

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<th>A19_1 hc %</th>
<th>A19_1 s %</th>
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<tr>
<td>No. Valid</td>
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<td>81</td>
<td>105</td>
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<td>33</td>
<td>57</td>
<td>33</td>
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<td>21.78</td>
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#### Frequencies

#### Statistics

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<th>A19_2 s kg</th>
<th>A19_2 hc %</th>
<th>A19_2 s %</th>
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<td>15</td>
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<td>72</td>
<td>123</td>
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#### Frequencies

#### Statistics

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<th>A19_3 s %</th>
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<td>96</td>
<td>96</td>
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#### Frequencies

#### Statistics

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Question 20. What are the most important problems on the collection of NTFPs?

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<th>2 - unimportant</th>
<th>3 – neutral</th>
<th>4 - important</th>
<th>5 – very important</th>
<th>99 – I don’t know</th>
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<td>Too much time spent on collection</td>
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<td>4</td>
<td>5</td>
</tr>
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<td>4</td>
<td>5</td>
</tr>
<tr>
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<tr>
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**Frequencies**

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Question 21. How much the NTFPs are important regarding your family budget?

1 - Unimportant at all      2 - Unimportant      3 - Neither important nor unimportant
4 - Important              5 - Very important      99 – I don’t know

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Question 22. How you determinate the price of NTFPs?

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Question 23. Which factors in your opinion influence in determination the price of NTFPs?

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Question 24. What is the price for 1kg NTFPs on the market in your country (average price)?

1. Mushrooms _________________________
2. Medicinal and aromatic plants __________
3. Berries and other fruits ______________
98 Other ______________________________

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Question 25. What do you think are there enough buyers of NTFPs?

1. Yes
2. No (please explain why that number have to increase)
99 I don’t know

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Question 26. Do the companies buy all collected quantities of NTFPs offered from one picker?

1. Yes
2. No
99 I don’t know

Frequencies

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Question 27. Do you sell raw NTFPs or processed NTFPs?

1. Raw NTFPs
2. Process NTFPs
3. Both (if both )

Can you tell me in % Raw _____ % Process _____ %

Frequencies

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### T-Test

#### One-Sample Statistics

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#### T-Test

#### One-Sample Statistics

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#### One-Sample Test

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