Agricultural Census 2010

STRUCTURE OF AGRICULTURAL HOLDINGS

WE KNOW WHAT WE HAVE

Podgorica, February 2012
"We know what we have" is the title of the sixth publication, in a row of published books about results on structure of agricultural holdings, and it represents the reply to our slogan "To know what we have". The slogan is used during preparation, organising, and conducting a large statistical action – Census of Agriculture. It results from the reason that after 50 years Statistical Office of Montenegro for the first time independently conducts collection, processing, and dissemination of data on agricultural holding structure at the overall territory of Montenegro.

This publication is the sublimate of previous five books on structure of agricultural holdings from the Census of Agriculture 2010, and it also comprises the data from the Census of Population, Households, and Dwellings 2011, as well as results of certain regular annual statistical surveys. It is prepared as a pocketbook and it can be a short reminder to all users of statistical data, and especially to agricultural policy creators in decision making and resolving the dilemma if the agricultural activity in Montenegro can be approached in one of three manners: priority, business or social category.

The publication with the comments indicates the analysis of main trends, key and interesting indicators in the area of agriculture, summarised in several tables and charts, and aimed at understanding the importance of structure, correlation, and area approach in the sector of agriculture.

This publication has been prepared for printing independently within Statistical Office of Montenegro – MONSTAT and it will be available in other media (CD, internet, etc.).

Podgorica, February 2012

Director
Gordana Radojević, MSc
STRUCTURE OF AGRICULTURAL HOLDINGS

MONSTAT - Montenegro Statistical Office

INTRODUCTION

From March to the end of December 2011 there were published five publications on structure of agricultural holdings in total (I publication Key Variables, March 2011; II publication Land resources, July 2011; III publication Livestock Resources, July 2011; IV publication Topics of Special Interest, October 2011, and V publication Typology of Farms, December 2011). This sixth publication consolidates the data from already published books on the structure of agricultural holdings from the Census of Agriculture 2010, and it also comprises the data from the Census of Population, Households, and Dwellings 2011, as well as the results from some regular annual statistical surveys. This publication also compares certain key variables in Montenegro with Western Balkan countries, and EU member countries. The aim of the publication is to present at one place the data from different sources referring to the agriculture of Montenegro, such as the data on gross value added, employment, and earnings in the agriculture (from regular statistical surveys), and data on structure of agricultural holdings (from the census of agriculture), and which relate to labour force, land and livestock resources.

We would like to remind on the existence of justified statistical reasons for conducting the Census of Agriculture, such as a lack of register of farms (family agricultural holdings) which is the valid framework for all regular statistical surveys. We would like also to remind on the following:

• Previous censuses of agriculture at the ex-Yugoslavia territory referred mainly to censuses of livestock, and they were conducted together with censuses of population. General censuses of agriculture were conducted in 1931 and in 1960. The data on agriculture were also collected by the Census of Population, and the last one which included the questions on agriculture was conducted in 2003.
• Preparation, organising, and conducting the third general one, and first independent Census of Agriculture at the territory of Montenegro were done by Statistical Office of Montenegro - MONSTAT in period from 2008 to 2010.
• Bureau for Preparation and Conducting the Census of Agriculture – statistical body for preparation, organising, and conducting the Census of Agriculture was established in March 2008. In the same year the cooperation with FAO and EU consultants was established aimed at meeting the EU needs.
• From 15 to 20 October 2008 the Pilot Census of Agriculture was conducted with the aim to assess the instruments which are to be used in the main census.
• The agreement on the project for reforming and strengthening Montenegrin agriculture was signed between the Government of Montenegro and World Bank on 27 May 2009. Financial resources provided were EUR 1 303 million (Midas project), and EUR 127 000 (co-financed by the Government of Montenegro).
• June 2009 – Law on Conducting the Census of Agriculture adopted.
• 2 March 2010 – Government of Montenegro adopted the Decision on date of conducting the Census of Agriculture.
• In period from 7 June to 21 June 2010 the Census of Agriculture was conducted at the whole territory of country, using the “door-to-door” approach.
• In period from 25 June to 5 July 2010 Statistical Office of Montenegro conducted the post-enumeration survey – quality and coverage control of census of agriculture.
• 22 July 2010 - first results of Census published.
1. GENERAL CHARACTERISTICS OF MONTENEGRO
MONSTAT - Montenegro Statistical Office

Territorial breakdown:
Number of municipalities: 21
Number of settlements: 1,307
Urban settlements: 58

Montenegro is in the South-East Europe
Area (in km²): 13,812
Population (Census 2011): 620,029
Population density: 45
Capital (the largest town): Podgorica
Historic Royal Capital: Cetinje
Currency: Euro
Climate: continental, Mediterranean and mountain
2. GENERAL CHARACTERISTICS OF AGRICULTURE IN MONTENEGRO
2.1. GROSS VALUE ADDED (GVA), SHARE OF SECTOR OF AGRICULTURE, HUNTING, AND FORESTRY IN GDP, EMPLOYMENT AND EARNINGS IN AGRICULTURE

In 2010 Gross Value Added (GVA) in sector of agriculture, hunting, and forestry was EUR 237.42 million what is less for 3.58% in comparison with 2009.

Within observed period from 2006 to 2010 the highest share of sector of agriculture, hunting, and forestry in GDP (Gross Domestic Product) was in 2009, i.e. 8.26%, and the lowest in 2007, i.e. 7.21%.

In 2010 the share of sector of agriculture, hunting, and forestry in GDP was 7.65%.

The average net earnings in sector of agriculture, forestry, and water management in 2010 were EUR 564, which is an increase of EUR 79 in comparison with 2009, i.e. 16.29%, and in comparison with 2008 there is an increase of EUR 166, i.e. 41.71%.

When observing the sector structure of employees in Montenegro in period from 2006 to 2010, the percentage share of employees in sector of agriculture, forestry, and water management in the total employment of Montenegro is characterised by the trend of decrease.

The share of this sector in sector structure of employees of Montenegro in 2006 was 1.73%, and there was 1.45% in 2010.

In 2010 the number of employees in this sector was 2 347, i.e. there is a decrease of 13.07% when compared with 2009.
Within the total import of Montenegro, the import of agricultural food products was 24.52% in 2010. On the side of export, within the total export of Montenegro, agricultural food products exported were 14.08% in 2010.

**Chart 2.2.1. Share of agricultural food products in export and import, in %**

<table>
<thead>
<tr>
<th>Year</th>
<th>Import (%)</th>
<th>Export (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>24.43</td>
<td>14.69</td>
</tr>
<tr>
<td>2009</td>
<td>24.82</td>
<td>9.86</td>
</tr>
<tr>
<td>2010</td>
<td>26.01</td>
<td>16.85</td>
</tr>
</tbody>
</table>

The mentioned data indicate a difference in export – import value of agricultural food products in 2010, i.e. EUR 359 800 621.50.

The value of import of milk and dairy products in 2008 was EUR 38.65 million with share of 1.53% in the total import of Montenegro. In 2009 and 2010 there was an increase in the shares of milk and diary products of the total import of Montenegro, thus the share in 2009 was 2.10%, while in 2010 it was 2.24% of the total import of Montenegro.

The value of import of live animals in 2008 was EUR 15.96 million with share of 0.63% in the total import of Montenegro. In 2009 and 2010 the share of live animals imported increased in the total import of Montenegro, thus the share for 2009 amounted 0.98%, while in 2010 it amounted 1.31% of the total import of Montenegro.

On the export side, the share of cereals amounted 0.03% of the total export of Montenegro in 2008 with the value of EUR 131.40 thousand. There was an increase of export of cereals in 2009 compared with 2008, whereas in 2010 the export of cereals decreased for 90% in comparison with 2009.

Within the 2010 structure of export, the export of edible fruit generated an income of EUR 4.73 million, indicating 90.02% more income than in the export of edible fruit in 2009.

The export of vegetable with value of EUR 3.45 million in 2010 contributed 1.04% to the total export of Montenegro. It indicates a decrease for 7% in comparison with 2009.

Within foreign trade of Montenegro, an observed period from 2008 to 2010 is characterised with the increase of import of milk, diary products, live animals, and the export of edible fruit. Within the total structure of import of Montenegro there is the largest import of vegetable, cereals, and edible fruit in 2009.
3. NUMBER OF AGRICULTURAL HOLDINGS
The total number of agricultural holdings is 48,870. Of those, there are 48,824 family agricultural holdings.

According to the size class of utilised agricultural land, there are 15,418 family agricultural holdings in interval from 0.1 – 0.5 ha, i.e. 31.6%.

Montenegro possesses 23,242 agricultural holdings classified as a Specialist grazing livestock, i.e. 47.56% of the total number of holdings.

Of the total number of family agricultural holdings, there are 43,125, i.e. 88.3% of family agricultural holdings with perennial meadows and pastures, while only 122 holdings with nurseries, i.e. 0.2%.

The majority of agricultural holdings using perennial meadows and pastures are with the main position in municipalities: Niksic, Podgorica, Bijelo Polje, Pljevlja, and Barane. There are in average 2.03 persons employed on agricultural holdings.

Of total 48,824 holders of family agricultural holdings, there are 6,286 women, i.e. 12.87%, and there are 42,538 men, i.e. 87.13%.

An average family agricultural holding possesses:
- 6.0 ha total available land,
- 4.3 ha agricultural utilised land,
- 0.4 ha other unutilised agricultural land,
- 0.2 ha agricultural uncultivated land overgrowing,
- 0.8 ha wooded land,
- 0.2 ha infertile land
- 3.6 livestock heads

The total value of economic size of agricultural holdings in Montenegro expressed in Euro is 125,817,765.2 or in average EUR 2,574.54 per agricultural holdings.

A municipality with the lowest number of family agricultural holdings is Tivat – 169, i.e. 0.35% of the total number of family agricultural holdings. A municipality with the largest number of family agricultural holdings is Podgorica – 7,276, i.e. 14.89% of the total number of family agricultural holdings.
3.2. NUMBER OF FAMILY AGRICULTURAL HOLDINGS - CENSUS OF AGRICULTURE 2010, AND CENSUS OF POPULATION, HOUSEHOLDS, AND DWELLINGS 2003

The number of family agricultural holdings is characterised by an increase of 11.53% in comparison with the Census of Population, Households, and Dwellings 2003. An increased number of family agricultural holdings is recorded in all municipalities, except in Pljevlja, Podgorica, Tivat, Ulcinj, and Zabljak. Niksic indicates the largest increase of number of family agricultural holdings - by 2,705 holdings, i.e. 39.29%.
Montenegro possesses 98,949 persons employed on agricultural holdings, of which there are 98,341 labour on family agricultural holdings. At the level of family agricultural holding, employed persons possess in average 0.47 annual work units (AWUs). The gender structure of labour force on family agricultural holdings comprises 59,405 men, i.e. 60.40%, and 38,936 women, i.e. 39.60%.

There are 23,198 persons aged 65 years and over employed on family agricultural holdings, i.e. 23.58% of the total labour force. The highest number of labour force aged 65 and over is in municipality Niksic, i.e. 3,206, and the lowest number in municipality Tivat, i.e. 71 employed persons.

On family agricultural holdings there are 6,717 labour force aged up to 24 years, i.e. 6.83% of the total labour force. The highest number of labour force aged up to 24 years is in municipality Bijelo Polje, i.e. 1,264, and the lowest number in municipality Budva, i.e. 8 persons doing work.

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4.2. LABOUR FORCE ON FAMILY AGRICULTURAL HOLDINGS BY EDUCATION

Labour force on family agricultural holdings comprises 33,180 persons with four years of other secondary education, i.e. 33.74%, of which there are 22,157 men, i.e. 66.78%, and 11,023 women, i.e. 33.22%. The number of persons with post-secondary or high education in agriculture is 1,446, i.e. 1.47% of the total labour force on family agricultural holdings. The number of men with post-secondary or high education in agriculture is 1,054, i.e. 72.89%, and the number of women is 392, i.e. 27.11%. The share of persons with other post-secondary or high education in the total labour force is 7.62%, of which there are 74.37% men, and 25.63% women.

When observing the educational structure of labour force on family agricultural holdings by municipalities, the highest number of persons with post-secondary or high education is in Podgorica, Niksic, and Bijelo Polje. The highest number of persons with post-secondary or high education in agriculture is in Berane, Podgorica, and Niksic.
The area of utilised agricultural land area on family agricultural holdings is 212,724.4 ha, i.e. 72.2% of the total available land.

An average area of utilised agricultural land area per family agricultural holding is 4.4 ha.

Other land categories, such as kitchen gardens, vineyards, orchards, and nurseries, together comprise slightly less than 4%.

On arable land there are mostly present cereals for grain with 1,257.1 ha, i.e. 31.05%, followed by fodder plants on 976.2 ha, i.e. 24.1%, and potato on the area of 890 ha, i.e. 21.9%.

Of cereals for the production of grain, there is mostly present maize for grain, and of fodder plants, there is clover.

Potato is mostly present on kitchen gardens and/or gardens with the area of 806.6 ha.

The largest area of utilised agricultural land comprises meadows and pastures (96.1%).
5.2. AREAS UNDER VEGETABLE ON ARABLE LAND, AND KITCHEN GARDENS AND/OR GARDENS BY MUNICIPALITIES

At the first place in Podgorica with vegetable cultivated on arable land, and in regards with cultivating vegetable in kitchen gardens and/or gardens, the first place belongs to municipality Bijelo Polje.

On arable land family agricultural holdings are mostly engaged in cultivating potato, cereals for grain, and vegetable (3 926 family agricultural holdings, i.e. 8% of the total number of family agricultural holdings are cultivating cereals for grain; 5 692, i.e. 11.6% cultivate potato, while 3 897 or 8% cultivate vegetable). In Montenegro, there are 37 010 agricultural holdings using 2 412.8 ha of kitchen gardens and/or gardens for cultivating vegetable, potato, fruit, and grape vines.

5.3. AREAS UNDER POTATO ON ARABLE LAND, AND KITCHEN GARDENS AND/OR GARDENS BY MUNICIPALITIES

Potato is cultivated on an area of 1 598.6 ha, of which there are 792 ha of arable land, and 806.6 ha of kitchen gardens and/or gardens. Potato comprises early potato, late potato, and seed potato on arable land, regardless if it is intended for own consumption, sale or feeding animals. Potato on kitchen gardens and/or gardens is mainly intended for own consumption.

The largest areas of potato which is cultivated on arable land are in Podgorica, and Niksic, and potato in kitchen gardens and/or gardens is dominant in Niksic and Bijelo Polje.
5.4. NUMBER OF TREES IN KITCHEN GARDENS AND/OR GARDENS, NUMBER OF EXTENSIVE TREES AND NUMBER OF PLANTATION TREES BY MUNICIPALITIES

Within the structure of fruit trees, the share of extensive trees is 71.5% of the total fruit trees representing a traditional manner of cultivating fruit on family agricultural holdings. The Census did not cover households which do not satisfy criteria for holding, although they possess the land, but they do not use it. Because of this, area of 773.1 ha or 0.15 ha per holding does not reflect the actual area of extensive orchards.

The highest number of fruit trees in kitchen gardens and/or gardens is present on holdings in municipalities: Podgorica and Bijelo Polje. They are characterised by extensive trees, while plantation trees are present mostly on holdings in Ulcinj.

![Chart 5.4. Number of trees in kitchen gardens and/or gardens, number of extensive trees, and number of plantation trees by municipalities](image)

The highest number of fruit trees in kitchen gardens and/or gardens is present on holdings in municipalities: Podgorica and Bijelo Polje. They are characterised by extensive trees, while plantation trees are present mostly on holdings in Ulcinj.
6.1. NUMBER OF LIVESTOCK ON FAMILY AGRICULTURAL HOLDINGS
Census of Agriculture 31 May 2010, and Livestock Survey 15 January 2010

Census of Agriculture 2010:
Number of holdings rearing bovines: 24,616
Number of bovines: 78,633
Number of dairy cows: 50,888
Number of holdings with sheep: 6,082
Number of ewes for milk production: 130,459
Number of holdings rearing pigs: 13,465
Number of sows of the first farrow: 280
Number of holdings rearing poultry: 16,304
Number of poultry: 411,086

Number of bovines: 79,797
Number of dairy cows: 53,607
Number of sheep in total: 177,808
Number of ewes for milk: 131,824
Number of pigs in total: 4,428
Number of sows of the first farrow: 140
Number of poultry: 257,904

The total number of agricultural holdings rearing livestock is 32,675, while the total number of livestock unit (LSU) is 117,753.1. The structure of livestock production is not proportional between family agricultural holdings and business entities. The characteristic of family agricultural holdings is that they possess a relative low and mixed livestock production with 3.6 LSU per holding, while business entities possess 257.4 LSU per holding.

### Table 6.1 Number of holdings using perennial meadows and pastures, and number of livestock

<table>
<thead>
<tr>
<th></th>
<th>Number of holdings</th>
<th>Perennial meadows and pastures ha</th>
<th>Bovines</th>
<th>Sheep</th>
<th>Goats</th>
<th>Pigs</th>
<th>Poultry</th>
<th>Horses, asses, mule</th>
<th>Area by LSU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Montenegro</td>
<td>43,142</td>
<td>4.87</td>
<td>80,206</td>
<td>229,037</td>
<td>25,756</td>
<td>47,673</td>
<td>620,802</td>
<td>4.397</td>
<td>1.78</td>
</tr>
</tbody>
</table>

According to the data from Census of Agriculture, total number of agricultural holdings in Montenegro using perennial meadows and pastures is 43,142. The average area of perennial meadows and pastures per agricultural holding is 4.87 ha, and per livestock unit 1.78 ha.

The highest number of agricultural holdings rearing bovines is 24,624, where an average number of bovines per agricultural holding is 3.3 heads. In average, there are 38 heads of poultry per agricultural holding rearing poultry, there are 3.5 pigs per those rearing pigs, and there are 9.9 goats per those rearing goats.

### Table 6.2 Number of holdings rearing sheep

<table>
<thead>
<tr>
<th></th>
<th>Number of holdings</th>
<th>Number of sheep</th>
<th>Number of holdings moving with sheep to the mountain land</th>
<th>Number of sheep on mountain land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Montenegro</td>
<td>6,088</td>
<td>229,037</td>
<td>2512</td>
<td>140,967</td>
</tr>
</tbody>
</table>

Number of holdings moving sheep to mountain land is 3,512, i.e. 57.7% of the total number of agricultural holdings breeding sheep.

Livestock resources in Montenegro are within rearing sheep, what is also confirmed by the data that every agricultural holding in average is entitled to 37.62 sheep.
Table 7.1. The share of utilised agricultural area of the total territorial land area

<table>
<thead>
<tr>
<th>Country</th>
<th>EU-27</th>
<th>Latvia</th>
<th>Malta</th>
<th>Czech Republic</th>
<th>Bulgaria</th>
<th>Belgium</th>
<th>Denmark</th>
<th>Germany</th>
<th>Greece</th>
<th>Germany</th>
<th>Ireland</th>
<th>Spain</th>
<th>France</th>
<th>Italy</th>
<th>Cyprus</th>
<th>Lithuania</th>
<th>Luxembourg</th>
<th>Hungary</th>
<th>Netherlands</th>
<th>Austria</th>
<th>Poland</th>
<th>Portugal</th>
<th>Romania</th>
<th>Slovakia</th>
<th>Sweden</th>
<th>Montenegro</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total territorial area</td>
<td>1 000 ha</td>
<td>41.5</td>
<td>41.2</td>
<td>32.6</td>
<td>78.9</td>
<td>47.3</td>
<td>45.1</td>
<td>44.7</td>
<td>59.6</td>
<td>45.1</td>
<td>59.6</td>
<td>59.6</td>
<td>45.1</td>
<td>54.3</td>
<td>44.7</td>
<td>59.6</td>
<td>59.6</td>
<td>54.3</td>
<td>59.6</td>
<td>54.3</td>
<td>59.6</td>
<td>44.7</td>
<td>59.6</td>
<td>59.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total utilised agricultural area</td>
<td>%</td>
<td>41.5</td>
<td>41.2</td>
<td>32.6</td>
<td>78.9</td>
<td>47.3</td>
<td>45.1</td>
<td>44.7</td>
<td>59.6</td>
<td>45.1</td>
<td>59.6</td>
<td>59.6</td>
<td>45.1</td>
<td>54.3</td>
<td>44.7</td>
<td>59.6</td>
<td>59.6</td>
<td>54.3</td>
<td>59.6</td>
<td>54.3</td>
<td>59.6</td>
<td>44.7</td>
<td>59.6</td>
<td>59.6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Census of Agriculture 2010, and pocketbook Agriculture and fishery statistics, edition 2011

The share of total utilised agricultural area of the total territorial area of countries observed fluctuates, thus this share is 7% in Sweden, in United Kingdom 71 %, while the share of utilised agricultural land in Montenegro of the total territorial area is 16%.
The chart above presents the comparable data for all EU countries respectively, and also for Montenegro. It is observable a dominant share of sheep in Greece (56%), number of bovines in Luxembourg (87%), while Denmark prevails with the number of pigs in the total number of bovines, sheep, and pigs. Additionally, when observing Montenegro by types of livestock, the percentage of share of the mentioned is the following: sheep 64%, bovines 22%, and pigs 13% of the total number.

Montenegro possesses 80,209 bovines, and compared with the EU member countries (Eurostat publication, 2007) it makes 0.12% of the total number of bovines. The same comparison of the total number of sheep (229,037) contributes with 2.12% to the total number of sheep, and there is 47,673 pigs contributing with 0.14%.
STRUCTURE OF AGRICULTURAL HOLDINGS

MONSTAT - Montenegro Statistical Office

LIST OF ACRONYMS AND ABBREVIATIONS:

GDP – Gross Domestic Product is the macroeconomic indicator indicating the value of final goods and services produced in a country during year, expressed in monetary unit.

EC – The European Commission is the EU’s executive body and represents the interests of Europe as a whole which has its headquarters in Brussels.

EEC – European Economic Community was an international organisation established with the aim to bring to the economic integration, including the common market including six European countries: Belgium, France, Germany, Italy, Luxembourg, and Netherlands.

FAO – Food and Agriculture Organisation is a specialised agency of the United Nations for food and agriculture that leads international efforts to defeat hunger.

FSS – Farm structure survey

SAPM – Survey on Agricultural Production Methods

LSU – Livestock unit is a standard measurement unit which facilitates the aggregation of livestock from various species for the comparison

AWU – Annual work unit is an employment equivalent to the full-time basis, i.e. total number of hours worked (number of days x average number of hours) divided by the average annual hours performed on works with the full-time basis in the country.

MIDAS – Montenegro Institutional Development and Agriculture Strengthening Project

METHODOLOGICAL NOTES

1. EU AND FAO DOCUMENTS

- Handbook on implementing FSS and SAPM definitions;
- Typology Handbook;
- FAO recommendations for the Census of Agriculture 2010.

2. MAIN DEFINITIONS

Family agricultural holding is a single unit, technically and economically, which has a single management and which performs the agricultural activity and can be family agricultural holding or entity.

Family agricultural holding is an enumeration unit using during the enumeration at least 1 000 m2 of agricultural land or less than 1 000 m2, and possessing:

- 1 cow and 1 calf, or 1 cow and 1 heifer, or
- 1 cow and 2 adult small stock heads, or
- 5 adult sheep or goats, or
- 3 adult pigs, or
- 4 adult heads of sheep or goats or pigs together, or
- 50 heads of adult poultry, or
- 20 beehives.

Total utilised agricultural land area is an area of utilised agricultural land (kitchen gardens, arable land – including fallow land, vineyards, orchards, nurseries, meadows and pastures). It is the sum of agricultural area owned; agricultural land rented from someone else less agricultural areas given for tenure.

Livestock resources are the number of livestock by types and categories.

Labour force on the holding refers to all persons aged 15 years doing work on the holding in reference period from 1 June 2009 to 31 May 2010.

Statistical Office of Montenegro – MONSTAT conducted the Census of Agriculture in period from 7 to 21 June 2010, which is the first one after fifty years period at the whole territory of Montenegro, and by using logo and slogan: