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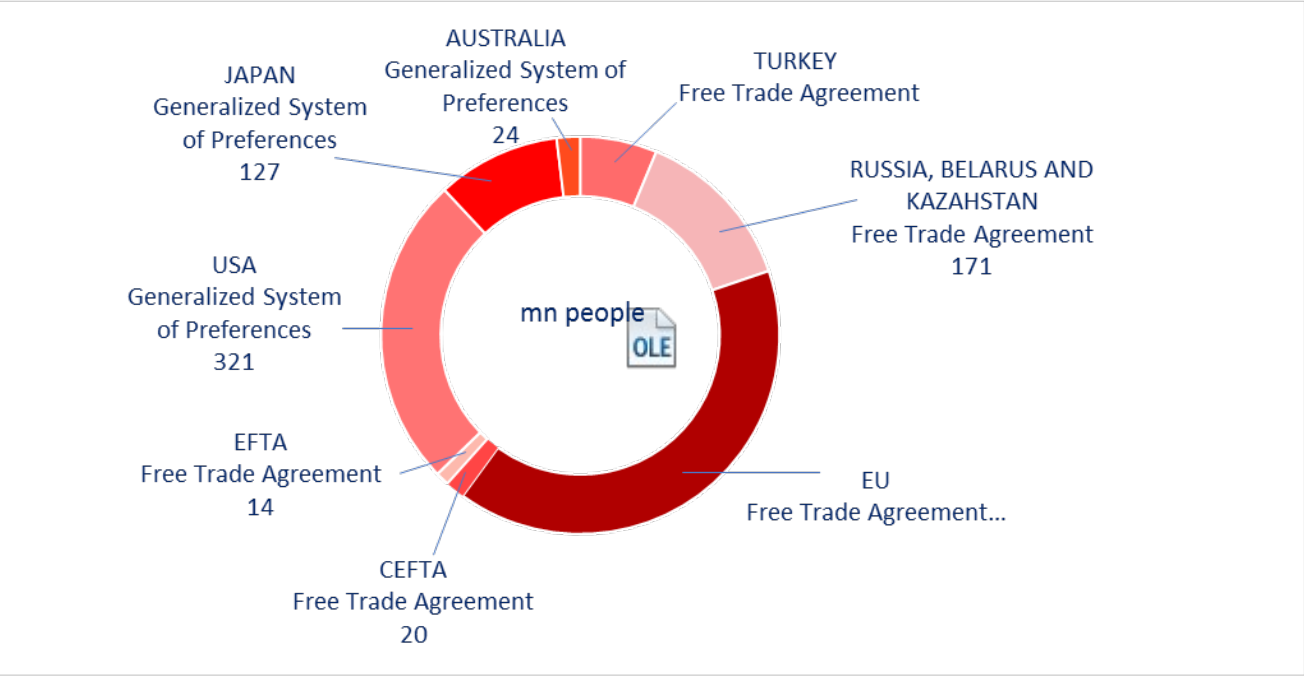
ITALY
SERBIA
COOPERATION

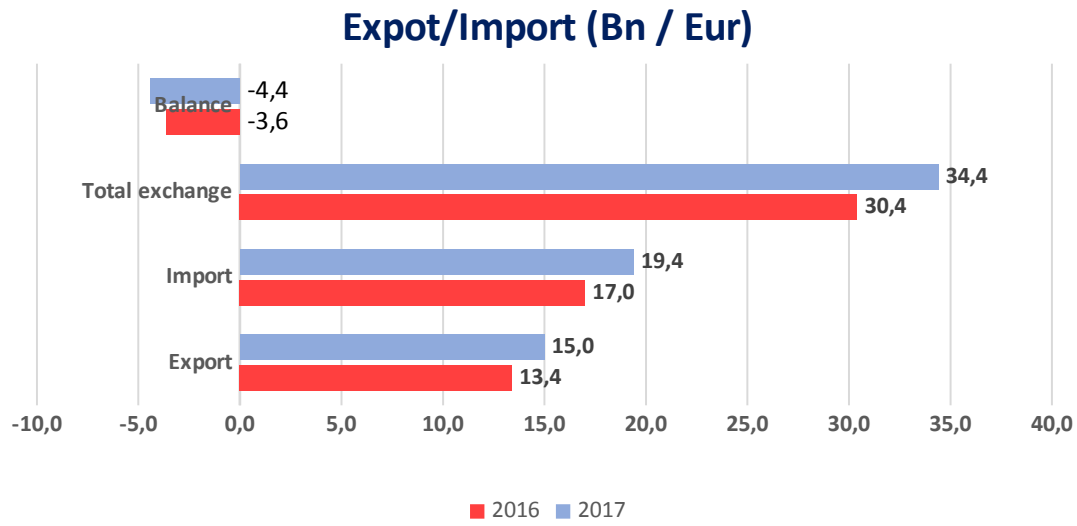
FREE TRADE AGREEMENTS



Goods made in Serbia benefit from Free Trade Agreements and GSP, placement to markets with more than 1.3bn people

SERBIAN FOREIGN TRADE WITH THE WORLD

SERBIAN FOREIGN TRADE WITH THE WORLD			
Billion/ EUR	2016	2017	Growth index
Export	13,4	15,0	112.0% ↗
Import	17,0	19,4	113.7% ↗
Total exchange	30,4	34,4	113.0% ↗
Balance	-3,6	-4,4	120.2% ↗



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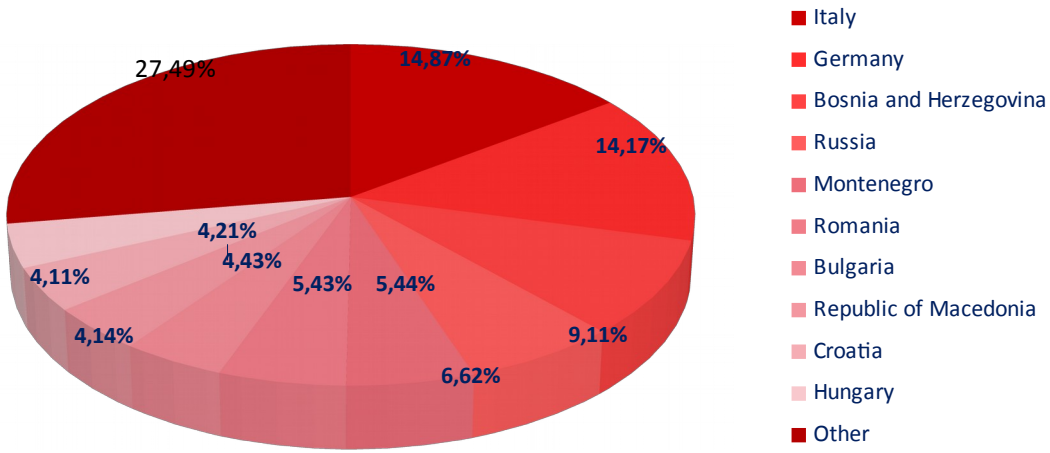
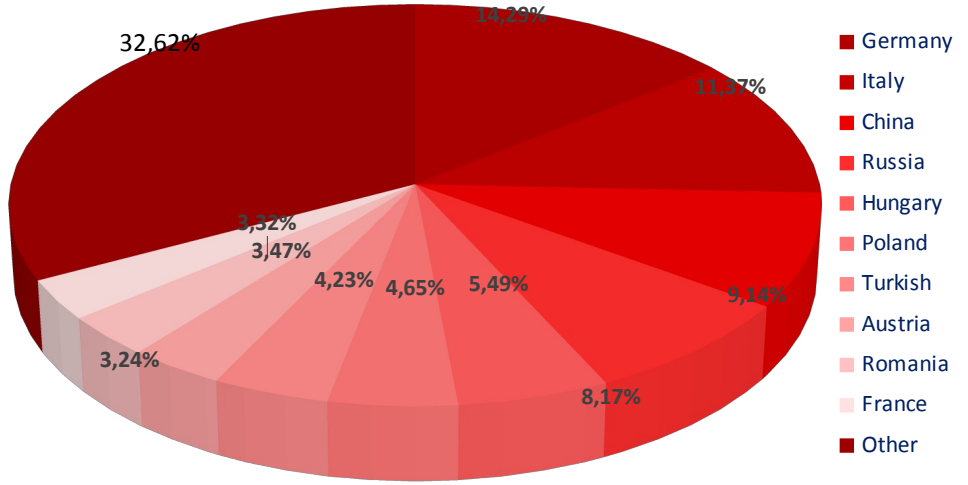
SERBIAN FOREIGN TRADE WITH THE WORLD

Participation in total export in 2017

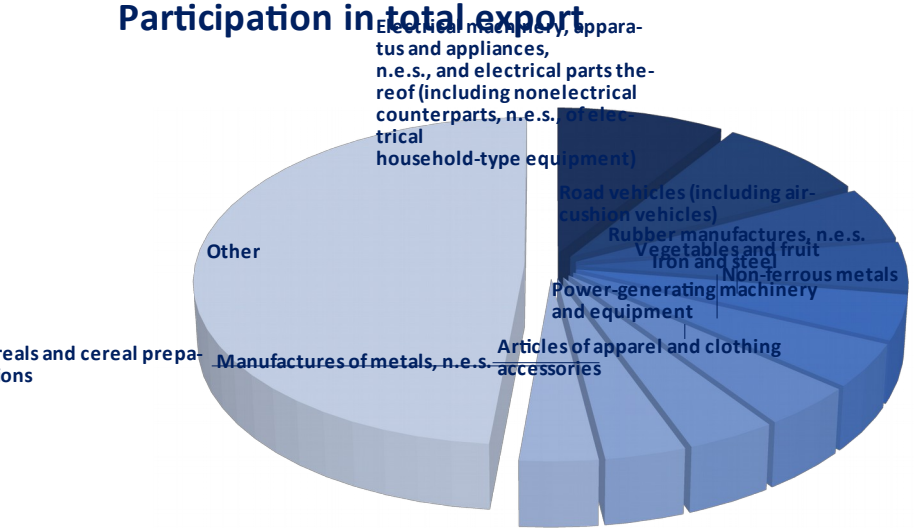


Participation in total import in 2017

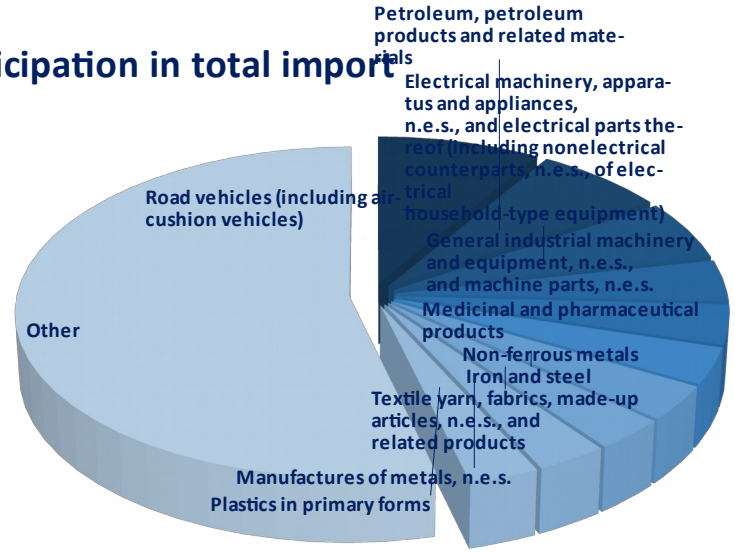


SERBIAN FOREIGN TRADE WITH THE WORLD

Participation in total export



Participation in total import



CAMERA DI COMMERCIO E INDUSTRIA DELLA SERBIA

ITALIAN COMPANIES IN SERBIA

No of companies	
1.711	
by sectors NACE rev 2 (top 10)	
G - WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	494
C - MANUFACTURING	399
M - PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	280
F - CONSTRUCTION	139
N - ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	99
J - INFORMATION AND COMMUNICATION	70
A - AGRICULTURE, FORESTRY AND FISHING	43
D - ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY	36
L - REAL ESTATE ACTIVITIES	35
I - ACCOMMODATION AND FOOD SERVICE ACTIVITIES	29

In 2018. 66 Italian Companies opened Their operations in Serbia

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WHAT ITALIAN COMPANIES DOING IN SERBIA?

Export markets:

- Russia, Belarus and Kazahstan
- US
- Japan
- Australia
- CEFTA
- EU

Products:

- Articles of apparel and clothing accessories, knitted or crocheted
- Footwear, gaiters and the like; parts of such articles
- Residues and waste from the food industries; prepared animal fodder
- Optical, photographic, cinematographic, measuring, checking, precision, medical or surgical . .
- Plastics and articles thereof
- Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; . .

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MAIN SECTORS
FOR POTENTIAL COOPERATION

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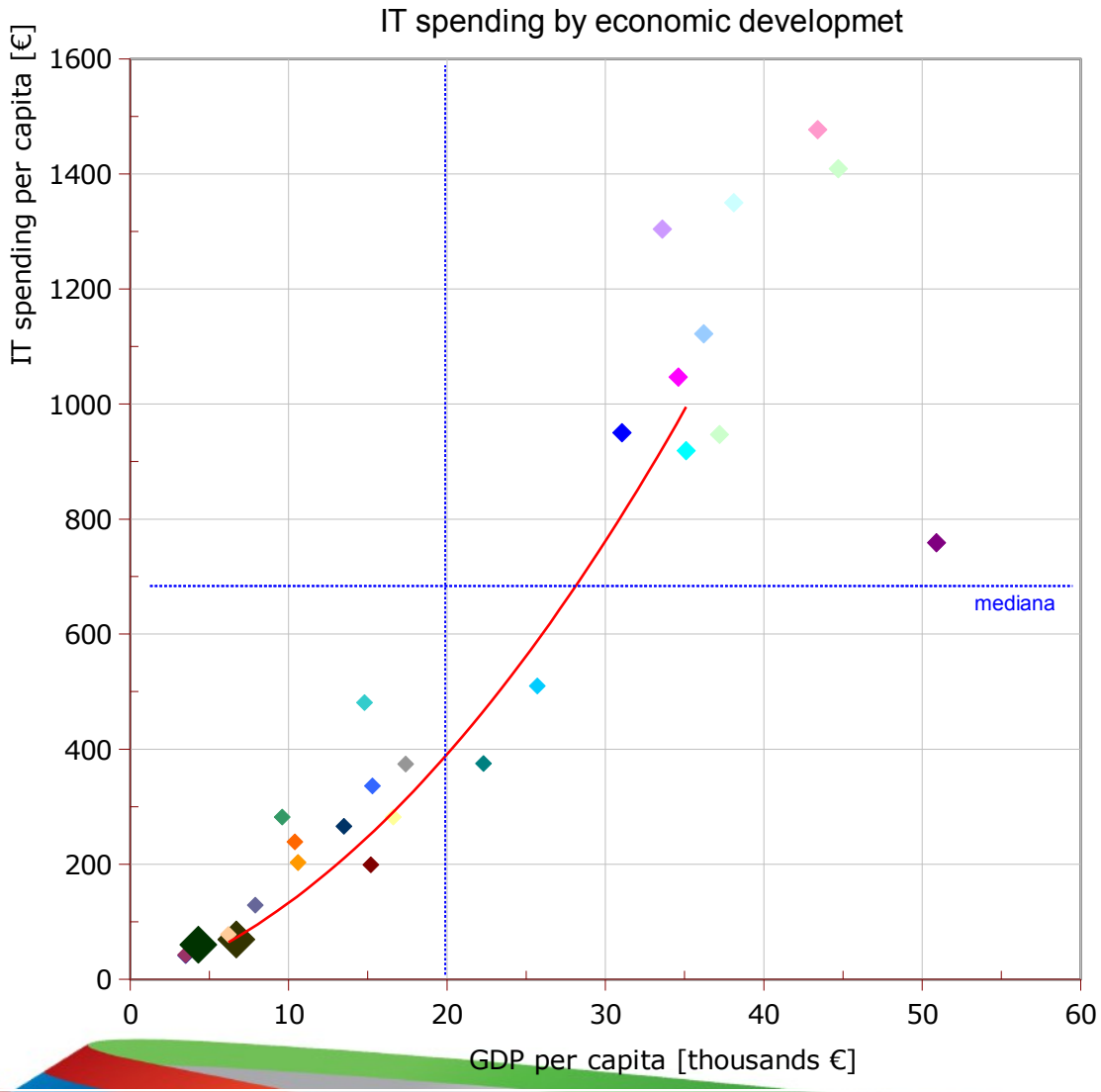
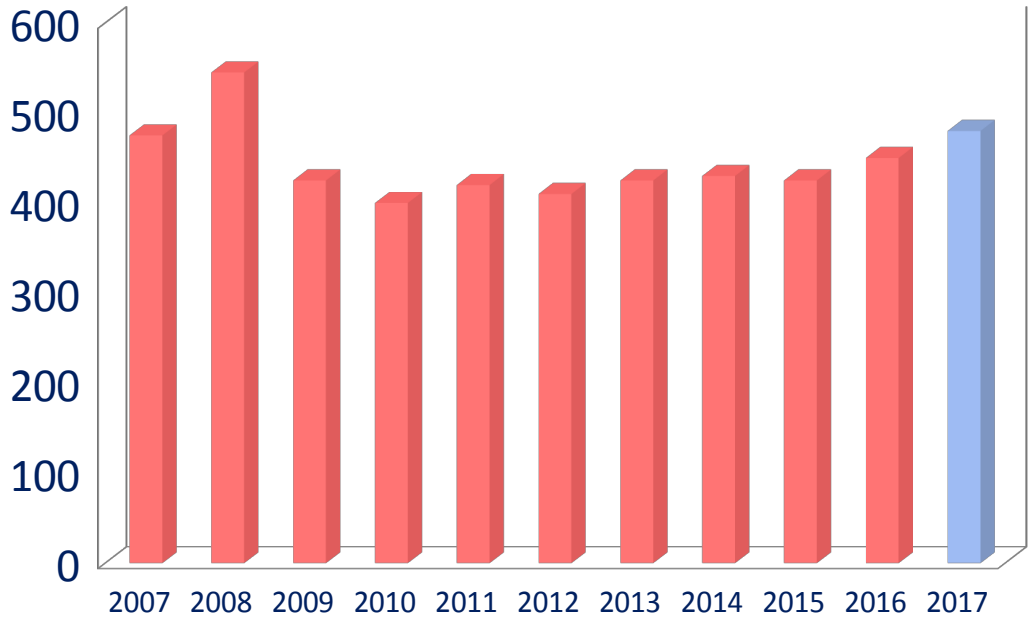
WHERE ARE SERBIA AND ITALY ON TECHNOLOGICAL WORLD MAP?



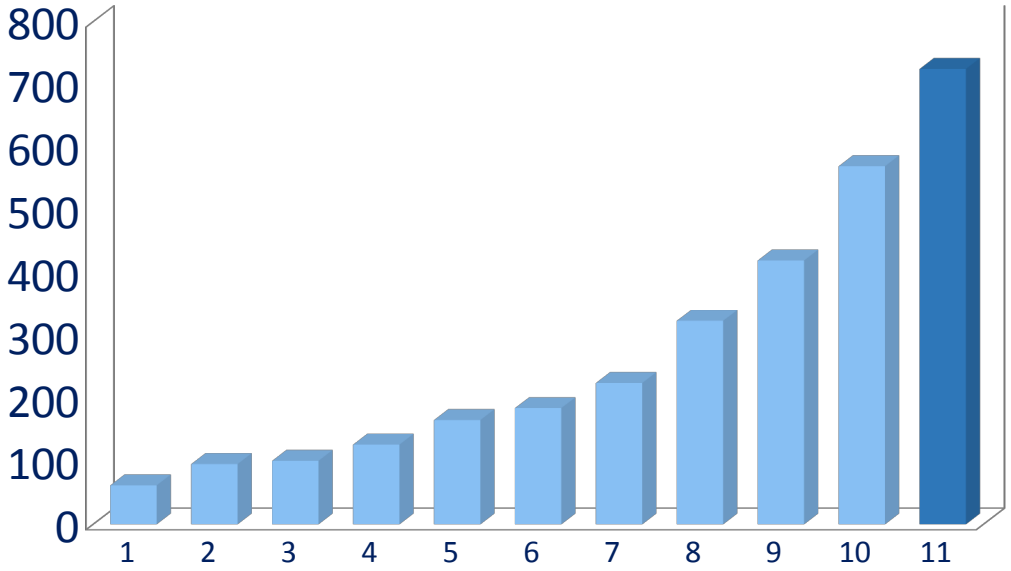
POTENTIAL OF IT SECTOR

VALUE (million EUR)



POTENTIAL OF IT SECTOR

EXPORT OF IT SERVICES 2007-2017



POTENTIAL OF IT SECTOR

ICT SECTOR'S KEY INDICATORS

- Number of active companies 2469
- Number of employees 33182
- ICT - fastest growing sector in Serbia - average yearly growth rate of 25.5%

OUTSOURCING POSSIBILITIES IN SERBIA

- Skillful programmers with European mentality, high quality, lower hourly rates and excellent English
- Every year, there are more than 1,500 graduated IT specialists from universities across the country
- ICT is taught at 35 higher education institutions

POTENTIAL OF IT SECTOR

FOREIGN IT COMPANIES IN SERBIA

- **Microsoft** - opened in Serbia its fifth global development center already in 2005
- **Asseco** - one of the leading IT companies in CEE acquired a Serbian banking software development company - employs around 500 engineers
- **DMS** made the best software solution for energy distribution and entered a joint venture with Telvent (nowadays Schneider Electric)
- Other key global players such as **SKF Group, Adobe, Oracle, Google, HP, SAP, IBM, Siemens, Intel, Cisco, NCRCorporation, Telenor, Erickson, Privax, Endava, Vast, Execom** established their development centers in Serbia or outsource services to local IT companies

POTENTIAL OF IT SECTOR

PRODUCTS OF IT INSDUSTRY

- Gaming and gambling solutions
- Energy management solutions
- eHealth solutions
- Geo location solutions
- Smart environment protection solutions
- Smart garbage collection solutions
- Smart city parking solutions
- IoT solutions

AREAS OF POTENTIAL COOPERATION

- Design of integrated circuits
- Sensors/MEMS
- Embedded software
- WSN
- Middleware/platform
- Industry solution
- Cloud computing
- Intelligent application

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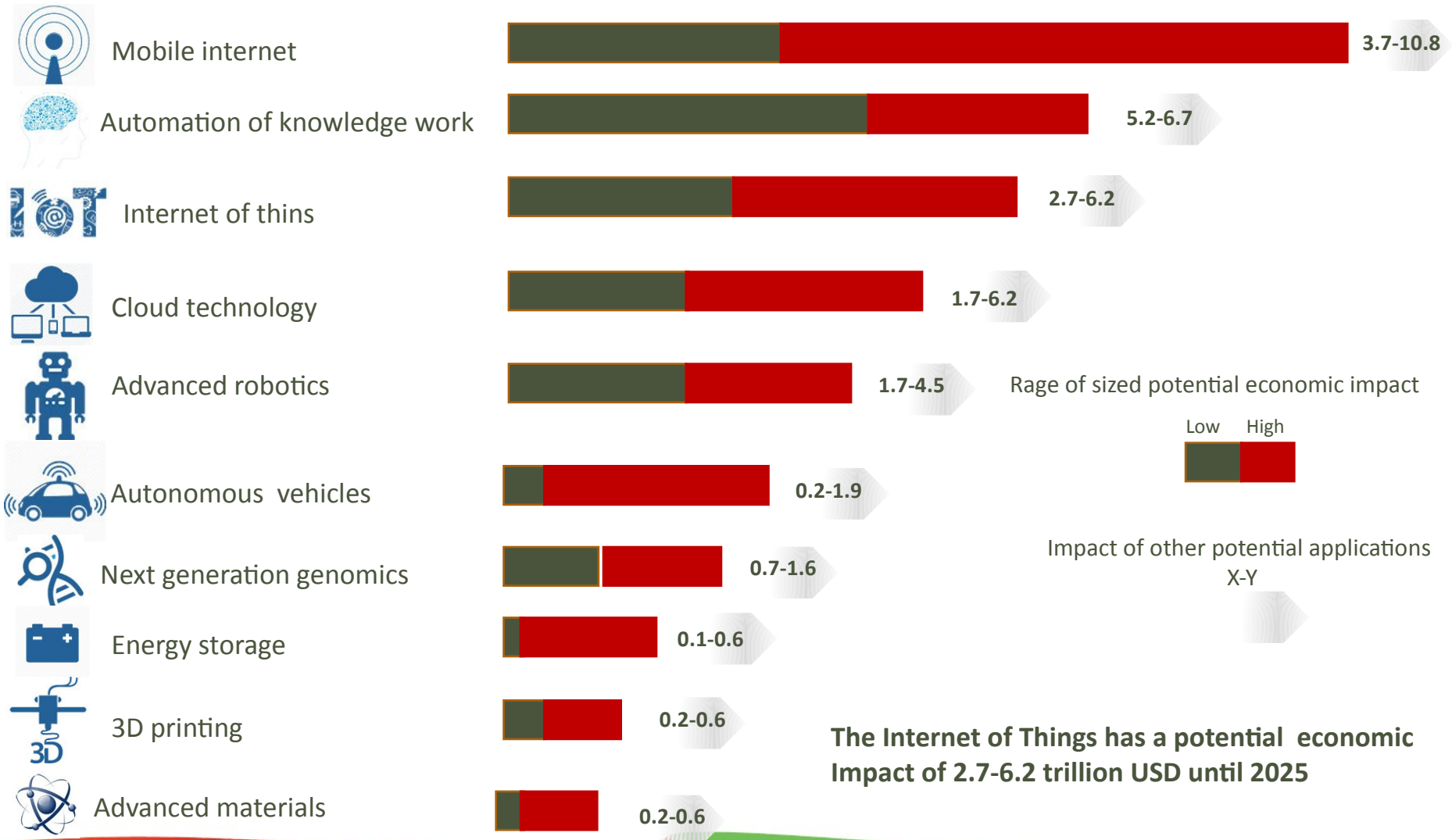
WHO WILL CAPTURE THIS OPPORTUNITY?

The IoT platform opportunity



The Internet of Things has a potential economic Impact of 2.7-6.2 trillion USD until 2025

AGRICULTURE AND FOOD INDUSTRY

- One of the most important sectors of the Serbian industry with significant growth potential
- 3.5 million hectares of arable land of which 74.3% is the agricultural land
- Lowest usage of fertilizers and pesticides in Europe
- With available resources, favorable climate, processing tradition and know-how Serbia could produce triple as much food as it does today and take an important role at the global food market in the near future
- Trade balance of agricultural products is in constant surplus - In 2016 Serbia had high surplus that amounted 1.53 billion EUR, which was 45% higher compared to 2015.
- Due to the very hot summer 2017. surplus plummeted 30% in the previous year.

MAJOR PRODUCTS IN THE FOOD INDUSTRY SECTOR	
Meat of all types	about 503,000 tons
Milk and dairy products	about 1.5 mil. liters
Sugar	about 400,000 tons
Sunflower oil	about 200,000 tons
Confectionery products	about 140,000 tons
Mineral water	about 6 mil. hl
Soft drinks	about 6.5 mil. hl
Beer	about 5 mil. hl
Wine	about 420,000 hl
Cheese	about 4.7 th. tons
Honey	about 12 th. tons

MAIN EXPORT PRODUCTS 2017	€ mil.
Maize	288
Cigarettes	210
Raspberries, frozen	195
Wheat	66
Apples, fresh	100
Beet or cane sugar, refined	80
Non-alcoholic beverages	93
Sweet biscuits, waffles and wafers	74
Animal feed	51
Beer made from malt	41

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AGRICULTURE AND FOOD INDUSTRY

LIVESTOCK BREEDING AND PROCESSING OF LIVESTOCK PRODUCTS

Live animals
(headcount– 2017 – heads)

- Cattle about 899 th.
- Sheep about 1.7 mil.
- Poultry about 16.34 mil.

Meat production
(tons)

- Beef 71,000
- Mutton 30,000
- Poultry 95,000

- Sector of primary milk production includes between 18 and 20 thousand farms
- Serbia has 792,000 beehives and in 2015, it produced the record 12,200 tons of honey
- Great potential for a larger number of beehives - over 1.2 mil.

PRODUCTION OF MAJOR CROPS IN 2017

Maize	4.02 mil. tons	Soybean	461 th. tons
Wheat	2.28 mil. tons	Plum	330 th. tons
Sugar beet	2.56 mil. tons	Apple	379 th. tons
Sunflower	541 th. tons	Raspberry	110 th. tons

SERBIA

1.Biggest world producer of raspberries

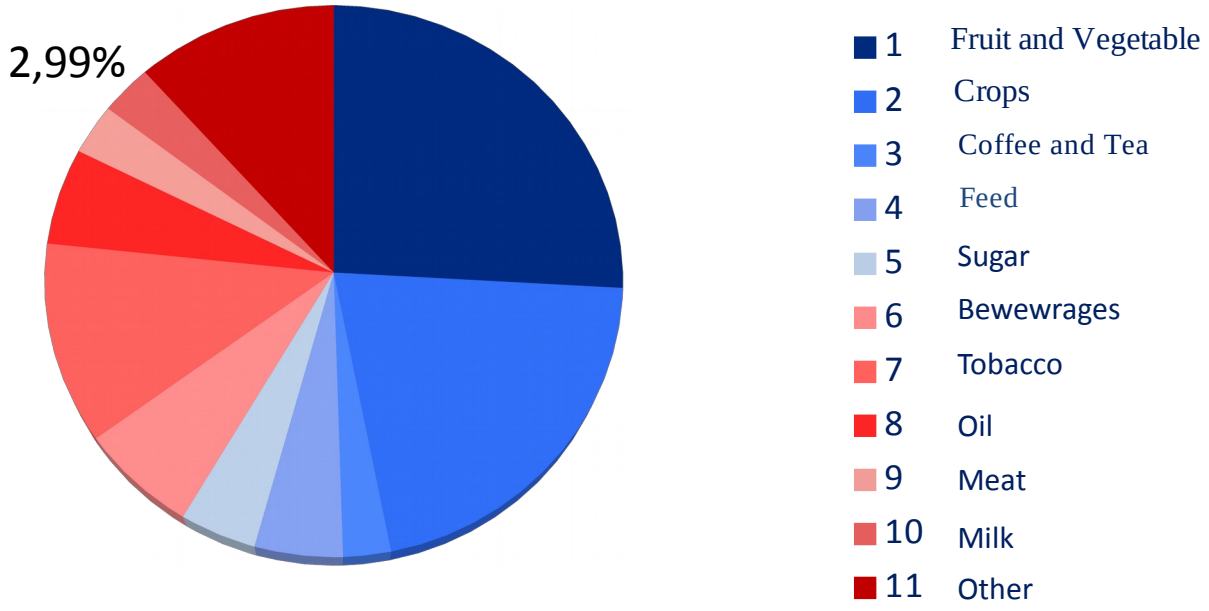
2.Second biggest world producer of plum

3.Tenth biggest world exporter of maize

4.Third biggest soybean producer in Europe

5.Biggest apple exporter to the Russian Federation

STRUCTURE OF AGRICULTURE EXPORT 2017



AGRICULTURE AND FOOD INDUSTRY

INVESTMENT OPPORTUNITIES

- Greenfield investments
- Mergers & acquisitions
- Investment in expansion of production facilities -cooling, freezing, processing, new production lines
- Investments in modernization of production facilities, improvement of productivity, quality or energy efficiency
- Investment in logistics (logistic centers, storages, etc.)
- PPP financial investments in agricultural infrastructure
- Investment in production of final products with more value added
- Potential for investments in organic production and livestock breeding

Incentives for investments above 2 ml EUR in agriculture and min 25 new job created

DIGITALIZATION OF AGRICULTURE

a digital agriculture toolset,
one stop shop for development
and provision of smart agriculture services

Better quality of crops and increased yields!

Decrease negative impact on the environment!

Prevent soil destruction!

Reduce water use!

Improve production processes planning!

Improve machinery usage!

Optimizing agricultural production
Increasing yealds and production
"Smart expert" on farmer's side

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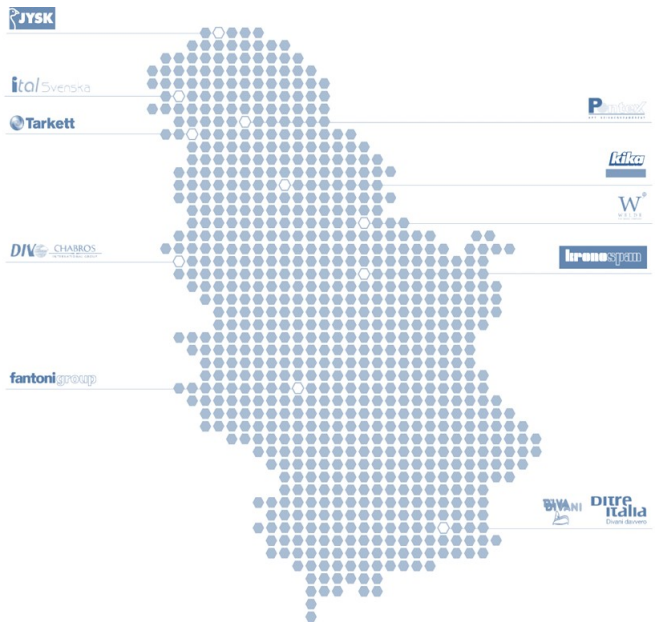
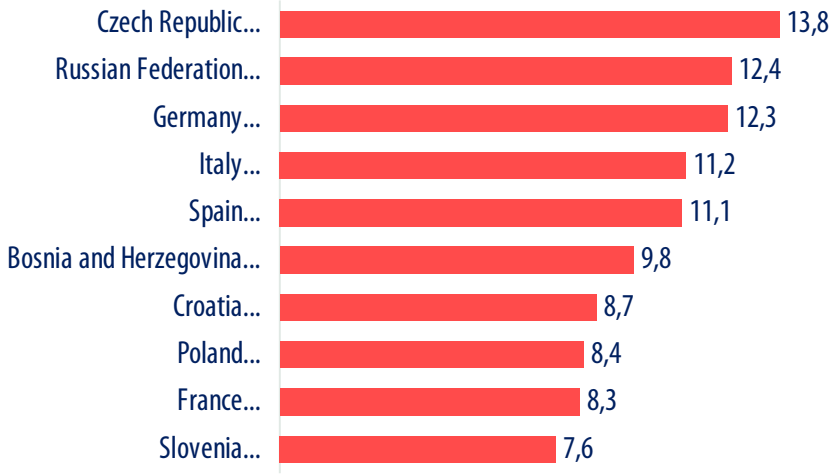
WOOD AND FURNITURE INDUSTRY

- Strong local demand and duty-free export access to Russian, EU and SEE market
- Large opportunities in sawn wood, engineered wood products, furniture, and paper production
- Top-quality domestic raw base materials
- One of the sub-sectors of the industry with the brightest future is the production of massive furniture
- This area offers comparative advantages such as: high-quality local raw materials, a low-priced labor force, low energy prices compared to other European countries, and a strategic geographic position that allows for fast shipment
- International competitiveness even in the most demanding EU markets
- Large space for increasing added value (primarily through design and marketing)
- Furniture manufacturers in Serbia are employing 57% of employees in Wood and Furniture industry
- Almost 90% of capital in furniture production is domestic capital, and a significant foreign trade surplus is being realized (exports are 1.7 times higher than imports)

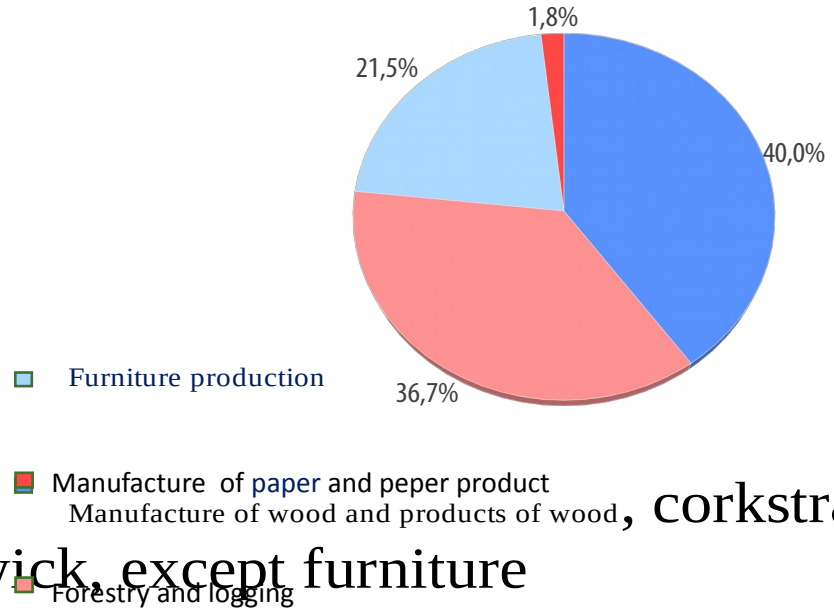


WOOD AND FURNITURE INDUSTRY

Export of furniture, wood and paper products by country, Q1- 2018 (in mln EUR)



Export structure, 2017.



DIGITALIZATION

- The furniture design process does not occur in isolation: when defining formal characteristics of a product or system, the designer must work in close relation with both manufacturer and the market
- In the current business environment, in which mass customization is succeeding mass production as a dominant model of manufacturing, it is necessary to reflect upon the impact of new variables in the design process.
- As digital design is increasing its impact among the design community, redefining design and production practices, it becomes important to assess its role as a domainto contribute to the establishment of mass customization in the furniture industry

TEXTILE, CLOTHING, LEATHER AND FOOTWEAR INDUSTRY

- Textile and leather manufacturing industry account for 8-9% in the total export of the Republic of Serbia
- In 2017, export was 1.3 billion USD, which is 15% higher that in 2016
- Export of socks had the largest share (267 billion USD)
- Upon the large number of new established companies in 2017/18, Serbia will have new increase of export by 10-15 %, and reach export level of 1.5 billion USD.

Texbaltic

UNITED COLORS OF BENETTON. CALZEDONIA Edil Fiorentini FULGAR GEOX
Comprom plus FALKE
GOLDEN LADY® ILARY JEANCI pompea Real Knitting

FDI IN SERBIA 2000-2017

Country	Name of company	Municipality in Serbia	Jobs created
Turkey	1. Jeanci 2. Aster Tekstil 3. Weibo Group 4. Taypa Tekstil	Leskovac, Krupanj, Niš, Vranje, Kraljevo, Kragujevac	9,155
Italy	1. Benetton Serbia 2. Pompea 3. CALZEDONIA 4. East West 5. Verdi Fashion 6. Fulgar 3	Niš, Zrenjanin, Apatin, Sremska Mitrovica, Valjevo, Subotica	4,323
Germany	FALKE	Leskovac	1,395
Belgium	BLOCKX 2	Bojnik	700
Croatia	Comprom Plus	Ruma	300
Slovenia	Startex	Pančevo	264
Netherlands	VNB Knitting Serbia	Leskovac	68
China	Bestresources International	Ćuprija	62
		Total:	**16,327**

TEXTILE, CLOTHING, LEATHER AND FOOTWEAR INDUSTRY

EXPORT OF TEXTILE AND LEATHER MANUFACTURING INDUSTRY

In 2017, the textile industry exported mainly the following: hosiery - sheer tights, knee-highs; brassieres, light synthetic fiber sweaters, men's cotton trousers, undershirts and T-shirts, synthetic yarn panties, camping products, PE binding ropes, coated and non-woven textile, carpets, synthetic fiber dresses, cotton trousers, swimwear etc.

In 2017, the leather –processing industry exported mainly the following:

– upper of footwear and its parts
– other footwear covering the ankle;
– waterproof rubber footwear covering the ankle;
– other footwear with rubber upper;
- footwear with rubber sole and textile upper, and
– parts of footwear.

The countries to which textile, clothing, leather and footwear are exported are: Italy, Germany, Russian Federation, Bosnia and Herzegovina, Croatia, Montenegro, Romania, Slovenia, Macedonia and Belgium.

Digitalization

- Thanks to advancements in predictive analytics, IoT, artificial intelligence and ERP, there is an extraordinary opportunity for textile players to achieve Industry 4.0 leadership and deliver automated control over the textile fabrication process from design and coloring to fiber construction, fabric creation, finishing and delivery.
- Today's digitally-connected consumer expects high-quality products; that much has remained constant
- Digital transformation journey is an intensive process, especially when applied to textiles – an industry built upon the finer details (e.g. dye stock management, workforce coordination, equipment monitoring)

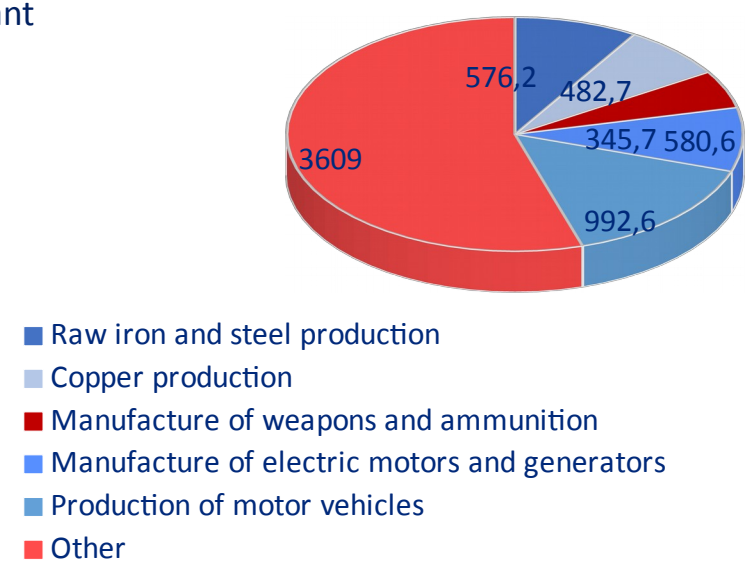
METAL AND ELECTRICAL INDUSTRY

EXPORT - IMPORT

- Total exports in 2017 for the metal, electrical, metal and metallurgical sector was 6.58 billion EUR, while imports in the same period was 6.56 billion EUR.
- Foreign trade **surplus** in 2017 for this sector was 25.1 million EUR and showed significant growth compared to the previous year, when the deficit amounted to € 238.4 million.

2016	No of companies	No of employees
Production of metal products, except ammunition and devices	1711	37 496
Production of electronic and optical devices	296	2 811
Production of non-specified machines and equipment	709	11 762
Production of electrical equipment	416	12 247
Manufacture of motor vehicles, trailers and semi-trailers	203	26 710
Production of basic metals	174	11 724
Production of other means of transportation	84	1 720

Export 2017 (mln EUR)



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METAL AND ELECTRICAL INDUSTRY

ADVANTAGES IN METAL AND ELECTRO INDUSTRY

- One of Serbia's core industries with the longest manufacturing tradition
- Most of the companies are export-oriented because of internationally acknowledged quality and competitive prices
- Highly-skilled workers and low labor costs (there are 5013 companies with 126 795 employees)
- Quick and easy access to the key markets - EU, SEE and Middle Eastern customers
- Flexibility of the manufacturer according to the requirements of the customer
- Proven export competitiveness
- Sector favorable for business of SMEs
- High participation of exporters in the total number of Serbian companies
- Metal-processing accounts around 20% of the Serbian exports as it has always been very export oriented and opened to collaboration with foreign companies. Italy, Germany and Bosnia and Herzegovina are the most important markets, while thanks to the FTA with Russia, Serbia has a growth of export to Russian market.

REAL ESTATE SECTOR

- Belgrade retail stock stands at 346.000 sq m out of which 136.000 sq m are split in four western style malls.
- Rental levels in shopping centers vary from 50 – 70 EUR/m² for units up to 150 sq m to up to 35 EUR/m² for units over 500 sq m.
- Rental levels on high street (Knez Mihailova, Terazije, Kralja Milana, Kralja Aleksandra boulevard) vary from ca 100 EUR/m² for units up to 150 sq m to 40 – 60 EUR/m² for units over 500 sq m.
- Rental levels on secondary high street vary from 35 – 45EUR/m² to 20 – 25 for larger units.
- Several new projects in Belgrade are in the pipeline largest being GTC's Ada Mall of 34.000 sq m and Galerija shopping center of 93.000 sq m of GLA.
- NEPI – Rockastle is developing 47.000 sq m large scheme Promenada in Novi Sad.

Source: ADVENTIS REAL ESTATE MANAGEMENT DOO

REAL ESTATE SECTOR

OFFICE MARKET

- Total Belgrade office stock now stands at 842.000 sq m GLA with overall vacancy dropping to 5% with potential of further drop in H2.

- Although developments are coming to market there is possibility of additional vacancy reduction due to high demand. Belgrade office stock is very limited in comparison with other countries in the region. With projects such as Usce Tower 2 (23.000 sq m GLA), Navigator 2 (27.000 sq m GLA), N house (10.700 sq m GLA) and some other under development, the office space stock is set to significantly increase in next few years. Most of the new projects are located in New Belgrade.

REAL ESTATE SECTOR

- Prime rents range between 15 – 17 EUR/m² for Class A office space, while rents for Class B vary between 9 – 12 EUR/m².
- The investment market also shows positive trends with major purchase coming from GTC who acquiered the building in New Belgrade with 17.900 sq m GLA.
- Real estate market in Serbia is recovering and enjoys significant potential with government efforts to keep it that way in terms of positive regulatory changes.

Source: ADVENTIS REAL ESTATE MANAGEMENT DOO

TOURISM AND CULTURE

- Active tourism - rafting, biking tours, hiking tours
- Hunting: 321 hunting-grounds at the area of 6.5 million hectares
- Ethno villages: Mokra Gora, Košutnići, Drvengrad, Old Village
- Ski resorts: Kopaonik, Stara Planina, Zlatibor, Tara, Rudnik, Divčibare etc. (first three have cable car)
- Potential investments in 3*hotels in Belgrade, no hotels around airport
- Lack of family entertainment parks
- Tourism based on city break, cultural heritage, festivals, MICE
- According to Ministry of Tourism in 2017 19% more foreign tourists came to visit Belgrade than in 2016. In Serbia in 2017 was growth of 13,4% comparing to 2016 in total number of toursits.

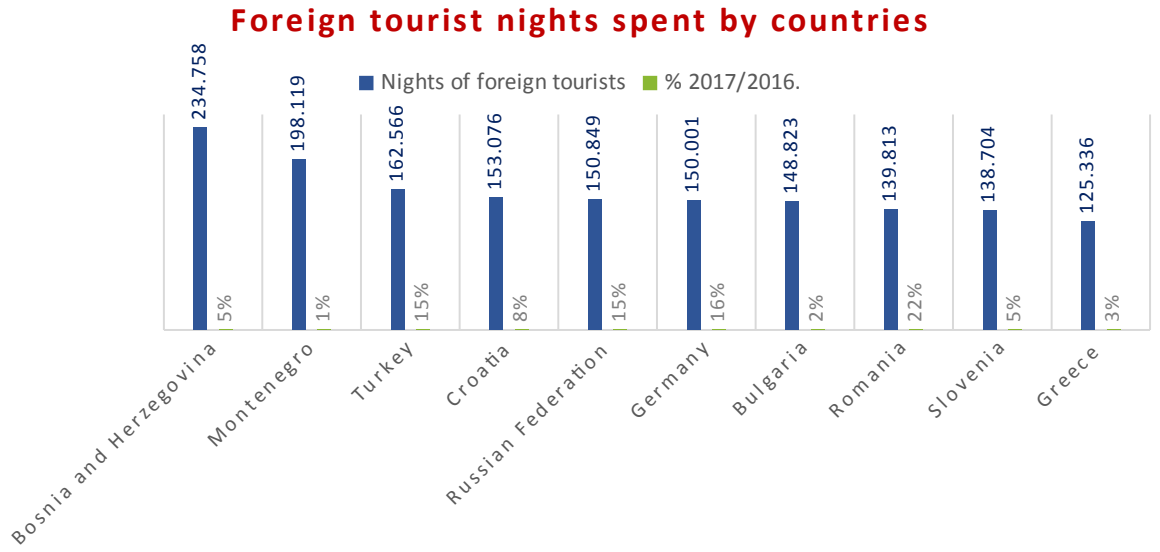
TOURISM AND CULTURE

- According to National Bank of Serbia foreign exchange inflows from tourism increased by 21%, compared to January 2017, with amount of 93 million euros. In 2017 was record growth comparing to 2016 13.4 %, income from tourism was 1.18 billion euros.
- Rising number of foreign tourists call for new hotels, in all categories. In March 2018 were opened new hotel chains, Hilton and Mama Shelter in Belgrade and Sheraton in Novi Sad.
- In Serbia 11 international hotel chains is doing business. There is 98 hotels in Belgrade, 4 with 5*, 52 with 4* and 32 with 3*. Between 2020-2021 is expected opening of St.Regis and W, the most exclusive luxury hotels investments in Belgrade Waterfront. There is a huge demand for 3* hotels as well as for Family Resorts with Aquaparks and Welness and Spa.
- Domestic hotels also started to develop - MK hotels, A hotels, Prezident hotels, Mona, Delta real estate hotels

TOURISM AND CULTURE

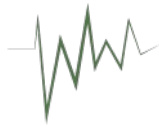
In 2017, the Republic of Serbia visited in total: **3,085,866 tourists**, which is **12% more** than in 2016, of which are foreigns: 1,497,173 (+ 17% / 2016), or **49%** of the total number of guests.

Places	No of Nights of foreign tourists	% 2017/2016.
Belgrade	1,691.817	+ 19 %
Novi Sad	231.340	+ 2 %
Zlatibor	132.188	+ 10 %
Kopaonik	104.991	+ 18 %
Vrnjacka Banja	98.343	- 6 %
Kragujevac	48.448	+ 20 %
Subotica	45.049	+ 5 %
Banja Koviljaca	33.011	+ 2 %
Gornja Trepca	19.115	+ 18 %
Banja Palic	18.800	+ 9 %



SPAS AND SPECIAL HOSPITALS FOR REHABILITATION

- Huge potential in the health/wellness segment
- About 40 spas
- More than 1,000 springs, over 500 springs of cold and hot mineral water, natural mineral gas and medical mud
- Only 10% of foreign tourists visit Serbian spas
- Potential for long-term growth of tourism in the period 2016-2026 according to World travel and tourism council: Serbia is 60th out of 184 countries, Slovenia 106th and Hungary 113th.
- At the end of 2017, the Government of the Republic of Serbia formed a working group for strategic solution to open issues related to spas. The task of the working group is to propose strategic measures for functioning of the spas.
- The head of the Working Group is the Deputy Prime Minister and Trade and Tourism Minister Rasim Ljajic, and it was announced that a public call for Kuršumlija spa would be announced during April 2018.



Projection	Direct and indirect contribution of tourism in GDP in 2026 (%)	Annual export growth of tourist services 2016-2026 (%)
Serbia	7.9	6.3
Hungary	12.5	4.6
Slovenia	14.1	4.2

SPAS AND SPECIAL HOSPITALS FOR REHABILITATION

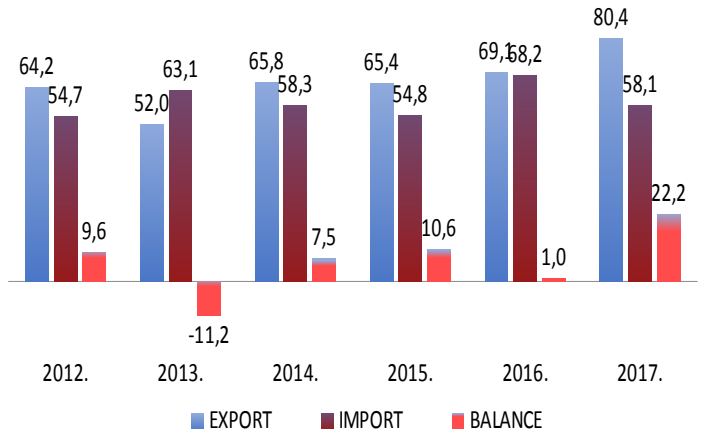
- Total capacity of Spas available for privatisation is about 4,000 beds

Spas for privatisation	Location	Special hospital for	Number of beds
NIŠKA BANJA	Niš	cardio-vascular and rheumatic treatment	560
BANJA KOVILJAČA	Loznica	rheumatic, joint and spinal diseases	420
BANJA BUJANOVAC	Bujanovac	rheumatic, conditions after injuries	191
GEJZER, SIJARINSKA BANJA	Medveđa	rheumatism, arthrosis, spondylosis	277
MERKUR, VRNJAČKA BANJA	Vrnjačka Banja	diabetes, conditions after hepatitis	708
RIBARSKA BANJA	Kruševac	orthopedic, skeletal-joint diseases	510
SOKOBANJA	Niš	aerosol therapy, physiotherapy	530
VRANJSKA BANJA	Vranje	rheumatology, neurological diseases	120
ZLATIBOR	Zlatibor	thyroid and metabolic diseases	350
TERMAL	Vrdnik	orthopedic, skeletal-joint diseases	254

CREATIVE INDUSTRY

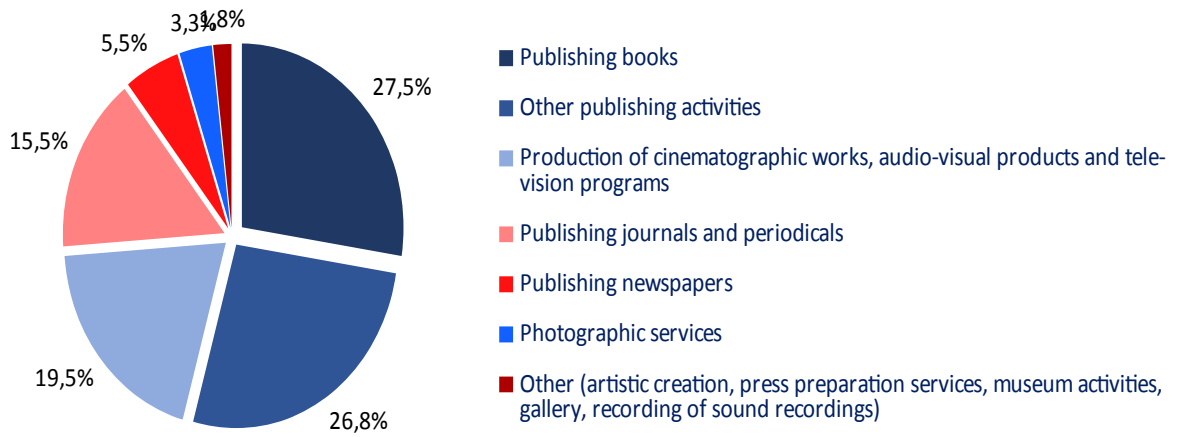
- The creative industry sector in Serbia has recorded a stable growth of 4.6 percent annually in the past three years
- Has a revenue of 4.7 billion euros, which is 13.5% of GDP of Serbia, with 31.835 companies in 2016
- It employs 4% of Serbian citizens
- Has strong export potential, with over 25% of export growth annually and one of the fastest growing segments of the Serbian economy.
- Governmental support through new state regulations (financing)

Foreign trade in the creative industry in the period 2012-2017. year, in million EUR



CREATIVE INDUSTRY

Structure of exports in the creative industry, by groups of activities, in 2017 (%)



CREATIVE INDUSTRY

New Regulation on incentives of the Goverment of the Republic of the Serbia:

- **„Regulation on incentives to investors to produce** an audiovisual work in the Republic of Serbia entered into force on August 27, 2015. In accordance with the Regulation, incentive funds are allocated to the investor, as non-refundable, by returning 20% of the eligible costs incurred in the Republic of Serbia, in order to stimulate economic activities related to audiovisual production, through increasing employment, as well as promoting the potential of the Republic of Serbia in this activity, its infrastructural, production and service activities. In 2016, a total of **2,731,879.8 EUR** was paid (for 9 projects).“

CREATIVE INDUSTRY

- Especially for the specific format:

- ❑ for the feature film, TV film and TV series: 300,000.00 EUR;
- ❑ for animated film, audio and / or visual post-production of audiovisual work: 150,000 EUR;
- ❑ for a dedicated film: 100,000.00 EUR;
- ❑ for documentary film: 50,000.00 EUR.

- Incentives provided in 2017 - **3,296,611.8 EUR**
- Investments in film production by July 1, 2017 - **17,558,509.7 EUR**
- Ratio of incentives and investments 1: 5,3 (cross-section made on January 1, 2017)

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CCIS

Chamber of Commerce and Industry of Serbia is the right place for investors to acquire necessary information and assistance in order to successfully implement their investment projects

Our key commitment is to make Serbia visible as a market economy country, with investment opportunities, open borders, and ready to join the European trends in a competitive way.

A century and a half of the Serbian chamber system tradition and the developed chamber network, Representative Offices abroad, are the guarantor of efficient implementation of the support mechanisms for the economy and businesspeople in their activities.

Good communication and cooperation with all relevant state institutions and local governments

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CCIS

There are 16 regional chambers of commerce on the local level

CIF is the inter-chamber platform bringing together 350,000 companies and a mechanism for the increase of export, attraction of investments and reduction of unemployment in the WB Region

CIF was established at the initiative of the CCIS and KCC* for the inclusion of the WB Chambers of Commerce (WB6 + CCI Croatia and CCI Slovenia) into the economic dimension of the Berlin process

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INTERNATIONAL ECONOMIC RELATIONS DIVISION OF CCIS

PURPOSE:

There are 16 regional chambers of commerce on the local level

CIF is the inter-chamber platform bringing together 350,000 companies and a mechanism for the increase of export, attraction of investments and reduction of unemployment in the WB Region

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INTERNATIONAL ECONOMIC RELATIONS DIVISION OF CCIS

MISSION

To assist domestic companies participating in foreign trade, but also to facilitate access to the global market in interaction with partners through:

- Business networking (exchange of trade missions, expos, state committees, business forums, conferences, multilateral organizations)
- Education and seminars
- Information on foreign trade movements from the corners of products, countries and groups of countries
- Operational "real time" support for members
- Publications

- Services:

1. Info sheet on foreign trade of a particular partner country;
2. How to operate on the market of a particular country or group of countries;
3. Event „Suppliers' Days";
4. The position of the product on the global market;
5. Highlight on systemic changes and risks in specific markets;
6. Quarterly, semi-annual and annual foreign trade fact sheet;
7. Magazin "Roadmap";
8. Magazin ''Exporter''.

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Chamber of Commerce and Industry of Serbia

Resavska 13-15

11000 Belgrade, Serbia

0800 808 809

bis@pks.rs

www.pks.rs

International Economic Relations Division

Contact: meo@pks.rs

Department for strategic planning, development and analyses

Contact: razvoj@pks.rs