
DEVELOPMENT OF SERBIAN AGRICULTURE THROUGH BRICS INTEGRATION: OPPORTUNITIES AND LIMITATIONS

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ARTICLE INFO

Original Article

Received: 08 May 2026

Accepted: 15 July 2026

doi:10.59267/ekoPolj2603839M

UDC

338.43:339.923BRICS(497.11)

Keywords:

Serbia, agriculture, BRICS, free trade agreements, agri-food exports, EU accession.

JEL: Q17, F13, F15, O13, P45

ABSTRACT

This study looks at Serbian agricultural growth from the perspective of BRICS integration, analyzing the advantages and disadvantages of this kind of involvement. With more than 5 million hectares of land used for agriculture and agri-food exports making up more than 20% of overall exports, Serbia has enormous agricultural potential, but it is still heavily reliant on the EU market. The study examines the extent of Serbia's agreements on free trade with the BRICS nations, such as the historic 2023 China-Serbia Free Trade deal and the 2021 EAEU deal, and evaluates how these agreements alter trade flows in important commodities as raspberries, corn, wheat, and cattle. The study generates data collected from FAOSTAT, the Statistical Office of the Republic of Serbia, Eurostat, USDA-FAS, and published peer-reviewed articles using desk research technique. Results show that although BRICS markets present real opportunities for diversification, major obstacles still exist, such as phytosanitary barriers, regulatory differences from European Union (EU) logistical and administrative bottlenecks, and geopolitical disputes resulting from Serbia's concurrent pursuit of EU membership. The study comes to the conclusion that while a dual-track approach is workable, its sustainability necessitates focused institutional modernization.

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Introduction

Due to the growth of emerging market countries, changing geopolitical alignments, and the proliferation of preferential trade agreements, global agricultural trade has experienced significant structural changes in the first quarter of the 21st century. The BRICS group, which was initially made up of Brazil, Russia, India, China, and South Africa, has become a major player in this changing environment. By 2021, it accounted for about 16% of worldwide agricultural exports, and with the addition of new members in 2024, it represented almost twenty percent of global agri-food trade (Glauben & Djuric, 2024).

These shifts present significant institutional dangers as well as strategic opportunities for small economies that are open like Serbia that are situated at the crossroads of several trading blocs. Serbia is a unique case study because it is a signatory to the Eurasian Economic Union (EAEU) Free Trade Agreement, an EU candidate state with long-standing preferential access to European markets, and, as of July 2024, the first European nation to sign a comprehensive free trade agreement with Beijing (Gecić Law, 2024). For the purpose of formulating agricultural policy, this set of overlapping trade connections produces a particularly complex environment.

In the Serbian economy, agriculture is structurally important. Serbia is one of the most agriculturally endowed economies in the Western Balkans, with over 5,056,000 hectares of agricultural land, or 0.7 hectares per person, and agri-food exports making up more than 20% of the nation's total merchandise exports, valued at about USD 4.7 billion in 2023 (SORS, 2023; USDA-FAS, 2024). In addition to being a major supplier of wheat, sunflower oil, sugar, and horticulture products, Serbia leads the world in the production of non-GMO corn and raspberries (ITA, 2024).

Serbian policymakers and academic experts are becoming increasingly interested in BRICS as a substitute structure for agricultural trade cooperation. The water resource management, food safety policy, and the exchange of best practices in sustainable production are among the specific fields of multilateral agricultural engagement identified by the BRICS Action Plan for Agricultural Cooperation, which was first introduced for the years 2017–2020 and later extended to 2024 (Singh, 2024). Together with Serbia's growing structure of bilateral agreements on free trade, these institutional measures create new market corridors that have the potential to drastically change the composition of the nation's agricultural export base.

Nevertheless, there are certain paradoxes in the quest for greater BRICS integration. The Common Agricultural Policies (CAP), the security of food laws, and phytosanitary standards must all be gradually harmonized with the EU *acquis* of communautaire as part of Serbia's ongoing EU membership process, which was formally started with status as a candidate granted in 2012 (European Commission, 2024). The existing scholarly work has not sufficiently addressed the structural difficulties created by simultaneously strengthening ties with BRICS nations, whose regulatory regimes differ significantly from EU norms.

By methodically analyzing the opportunity that BRICS integration presents for Serbian the development of agriculture as well as the institutional, legal, and geopolitical constraints that restrict its realization, this research seeks to close this gap. Using primary statistics sources from FAOSTAT, Statistical Office of the Republic of Serbia, Eurostat, USDA-FAS documents, and a corpus of published academic literature.

Literature review

BRICS (Brazil, Russia, India, China, and South Africa) is significant because it is a new economic, global, trade, and financial force that opposes globalization and the current geopolitical, economic, and financial division and unity of the world. (Pejanović et al., 2026). According to Glauben and Djuric's (2024) analysis published in *Intereconomics*, BRICS members are among the key players in global agri-food markets, along with the G7 nations and the EU. This is the most thorough recent evaluation of BRICS's overall structural position within global agri-food trade. According to their research, global agricultural exports increased by approximately a third in nominal currency terms in 2021, reaching nearly USD 2 trillion. The BRICS countries accounted for about 16% of this total, and under the wider BRICS+ configuration, that percentage is expected to rise to 20% (Glauben & Djuric, 2024).

In an article published in *Progress in Development Studies*, Bamidele (2025) explains the macro-structural aspect of what he refers to as the "BRICS-driven agrarian shift," contending that these emerging markets are significantly altering worldwide farming systems through supply chain reconfiguration, production, and trade patterns. According to Bamidele (2025), BRICS is the center of a "agricultural pivot" in which the group's place in the global division of labor is gradually being repositioned due to growing exports of agricultural products capacities and agro-processing activities. Insofar as it recognizes structural demand expansion as the primary driving force of BRICS agrarian market growth rather than merely tariff liberalization, this conceptualization offers a helpful theoretical foundation for Serbia's strategic evaluation of BRICS market potential.

Increasing numbers of academic research focused on policy has shown the institutionalization of agricultural cooperation among BRICS. In his comprehensive description of the BRICS Agricultural Cooperation Action Plan framework, Singh (2024) points out that by April 2024, Russia's BRICS presidency had called the first summit of the BRICS Working Group on Agriculture, with the encouragement of environmentally friendly farming, mutually beneficial trade improvement, and food security as the top priority. Growing populations, changes in the climate, and international instability are putting further strain on food security worldwide (Laamarti et al., 2026). The wider examination of institutions of the BRICS+ development at the Johannesburg Summit in 2023 and the Kazan Summit in 2024, both that are thoroughly studied by Maihold, Müller, and Átig (2024), who place BRICS's farming management progress in the global geopolitical environment of a multipolar system formation, supports the analytical structure established by Singh (2024). In *Frontiers*

in Sustainable Food Systems, Xin et al. (2024) thoroughly analyze the particular institutional structure of BRICS facilitation of trade for products from agriculture, which directly relates to possible Serbian market access. Xin et al. (2024) use an analysis of principal components analyzing trade facilitating parameters for BRICS members from 2009 to 2022 and a stochastic random frontier based gravity model to find that overall commerce facilitating in BRICS countries is still relatively low, with significant room for improvement.

The function of the New Development Bank (NDB), the multilateral development organization of the BRICS, has been investigated from the standpoint of monetary support for agricultural development in relation to investment in infrastructure for agri-food industries in emerging economies. For investment in agriculture in candidate economies like Serbia, the NDB's objective to fund sustainable development and infrastructure initiatives in BRICS and partner nations presents a theoretically substantial, albeit operationally embryonic, avenue. The NDB is framed as one of numerous alternative development financing mechanisms that challenge the institutional supremacy of Bretton Woods institutions in Lippert and Mair's (2024) larger evaluation of a multipolar world orders and EU strategic repositioning.

This result supports the previous investigation by Marković and Simonović (2025), presented in the same journal, which shows that, in contrast to bulk commodities like corn, where manufacturing expenses is the main competitive factor, quality of product rather than expenditure determines an a competitive advantage in quality-competitive products like frozen fruit and apples (Marković & Simonović, 2025). Serbia's unique positioning approach in the BRICS markets is significantly impacted by this quality-cost distinction.

Vapa-Tankosić et al. (2022) have analyzed Serbia's food safety policy in the context of EU standards harmonization, looking at the country's dual status as an EU applicant country and an active bilaterally FTA negotiator from the regulatory harmonization perspective. According to their study, which was presented in the Journal of Agronomy, Technology and Engineering Management, Serbia's access to other global markets, including BRICS destination countries, is simultaneously conditioned by European standards and technical barriers to EU market access, especially in the areas of sanitation, hygiene, welfare of animals, and environmental regulation (Vapa-Tankosić et al., 2022).

During the 2023 BRICS Johannesburg Summit and the 2024 Kazan Summit, the geopolitical discourse on Serbia's position among integration into the EU and BRICS engagement has significantly risen. According to the Pupin Institute's 2025 analytical assessment, Serbia's strategy is driven by three main factors: strategic bargaining power in its relationship with the EU and Western institutions; investment in infrastructure attraction according to the Belt and Road Initiative; and diversification of its economy and trade growth through a variety of agreements. The Pupin Institute (2025) acknowledges economic reasoning of broad diversification but also draws

attention to the basic diversity of the BRICS arrangement, pointing out that the countries are not united in thought, physical location, or tradition, and that their partnership is mainly founded on an opposition to Western superiority rather than shared principles. This institutional restriction limits the scope of an institutionalized farming-related partnership.

Vladisavljev (2025) of the Mercator Institute for China Studies (MERICS) evaluated Serbia's first BRICS+/China free trading agreement, which is the greatest significant bilateral economic development analyzed in this research. According to Vladisavljev's analysis of the initial year of FTA adoption, overall bilateral commerce between Serbia and China increased by 21% compared to the previous year to USD 7.4 billion in 2024. Nevertheless, 93% of Serbian exporting to China consisted of mining and copper products. Raspberry exports to China actually decreased from USD 1.2 million in 2023 to USD 832,000 in 2024 despite the tariff reduction, despite agricultural products like raspberries, apples, and beef—the politically supported beneficiary of the FTA—contributing only slightly to export growth (Vladisavljev, 2025). The current article attempts to contextualize this recorded discrepancy between FTA capacity and actual agriculture export performance within the larger structure of BRICS integration advantages and barriers.

When viewed jointly, the literature review demonstrates a glaring empirical gap: although bilateral negotiating dimensions of Serbia's major free trade agreements and the macroeconomic dynamics associated with BRICS agricultural trade have been studied separately, no previous study has methodically combined the commodity-specific analysis of competition, the regulation harmonization obstacles, and the geopolitical factors of conditioning into a cohesive evaluation of Serbia's agricultural progress possibilities by means of BRICS convergence.. This gap is filled in the current paper.

Materials and methods

This study uses a thorough desk research technique, which is characterized by the methodical gathering, synthesis, and critical evaluation of secondary information from reputable academic, statistical, and institutional sources. Considering the multidisciplinary characteristics of the subject matter, which includes geopolitical analysis, global trade policy, and agricultural economics, desk-based research approach is suitable for the current study. In agricultural economics, the methodology adheres to accepted norms for comprehensive synthesis of evidence.

The following sources provided primary statistical data: (i) the Food and Agriculture Organization of the United Nations' FAOSTAT database, which covers production, trade, and price series for Serbia and BRICS the member countries from 2010 to 2023; (ii) the Statistical Office of the Republic of Serbia (SORS), which includes preliminary findings of the 2023 Census of Agriculture and annual national accounts releases; (iii) Eurostat's agriculture and agri-food trade databases, which provide EU-standardized

comparative analysis statistics; and (iv) the United States Department of Agriculture – Foreign Agricultural Service (USDA-FAS) annually published country reports for Serbia, covering the years 2019–2024.

Two complimentary dimensions are integrated into the analytical framework. In order to determine Serbia's competitive specialization, a trade structure study first looks at the makeup and development of Serbian agri-food exports to BRICS markets using revealed comparative advantage (RCA) concepts. Second, the regulatory alignment assessment compares and contrasts Serbia's current phytosanitary and food safety laws with those that apply in important BRICS markets, paying special attention to Russia's EAEU technical regulations and China's import certification requirements.

With special attention to peer-reviewed works published in journals such as *Intereconomics – Review of European Economic Policy*, *Progress in Development Studies*, *EuroChoices*, and *Economics of Agriculture*, international academic literature was examined using databases like Elsevier, Springer, and ResearchGate. The BRICS Agricultural Cooperation Action Plans, the texts of the Serbia-EAEU Free Trade Agreement (2019/2021) and the Serbia-China Free Trade Agreement (2023/2024), and the Serbia Progress Reports for 2023 and 2024 from the European Commission are among the policy documents examined.

Results and Discussion

Structure and Importance of Serbian Agriculture

A comparatively significant number of family-owned small-holdings, which amount to 99.6% of all formally registered farming entities, in accordance to the 2023 Census of Agriculture, coexist with a lesser number of large-scale commercial farms that are centered in the fertile region of the Pannonian Plain of Vojvodina to form Serbia's agricultural industry (SORS, 2024). The total amount used agricultural area (UAA) as of 2023 is estimated at 3,239,373 hectares, of which 77.7% corresponds to arable land. With 61.7% of holdings growing animals, mainly pigs, cattle, and sheep, livestock farming is still a significant sector.

During the past ten years, agriculture's share of Serbian GDP has declined structurally, from an historical average value of roughly 8% (1995–2023) to 3.79% in 2023. This decline is indicative of an overall process of industrial improvement and economic structural transformation (TheGlobalEconomy.com, based on World Bank data, 2024). However, the industry's strategic worth extends far further than its fundamental impact on economic. As agricultural processing and the food-related sector are taken into consideration, food production and agriculture produce more than 10% of Serbia's general economic output and roughly 20% of all exported goods (ITA, 2024). With over 120,000 employees across more than 20,000 businesses, 90% of which are micro, small, or medium-sized, the food production sector alone accounts for over one-third of Serbia's total industrial sector (ITA, 2024).

The industry's fluctuation is demonstrated by quantitative volumetric output data from SORS. The 2022 agriculture year saw a notable 8.0% physical quantity decrease, which was attributed to the severe summer-time drought conditions and problems related to grain transportation within Black Sea ports resulting from the conflict between Russia and Ukraine (SORS, 2022; USDA-FAS, 2023). Such events affect food security (Glauber & Laborde Debucquet, 2023)

On the other hand, agricultural output volume had a robust 9.0% increase in 2023 (SORS, 2023). These variations highlight the industry's inherent production flexibility as well as its susceptibility to geopolitical and climatic changes. The main agricultural indicators for Serbia from 2019 to 2023 are shown in Table 1.

Table 1. Key Indicators of Serbian Agriculture, 2019–2023

Indicator	2019	2020	2021	2022	2023
Agricultural land (000 ha)	5,058	5,058	5,056	5,056	5,056
Arable land (000 ha)	3,297	3,295	3,294	3,294	3,239
Agri-food exports (USD bn)	3.8	3.9	4.5	5.0	4.7
Agri exports as % of total exports	21.0%	22.1%	21.5%	21.8%	20.5%
Agriculture % of GDP	5.6%	6.2%	5.9%	5.3%	3.8%
Agri production growth (vol.)	+3.1%	+2.8%	+4.2%	-8.0%	+9.0%

Source: SORS (2022; 2023; 2024); FAO FAOSTAT (2023); USDA-FAS (2024); authors' compilation.

The Trade Structure of Serbia with the BRICS Nations

Prior to the official BRICS+ growing, Serbia engaged with economies of the BRICS through agreements on preferential trade. On July 10, 2021, Serbia's previous dual trade liberalization arrangements with the Russian Federation as well as other post-Soviet nations were replaced and expanded upon by the Agreement on Free Trade with the Eurasian Economic Union, which covers Russia, Belarus, Kazakhstan, Kyrgyzstan, and Armenia.

About 99% of Serbian traded goods have advantageous access to a consolidated marketplace of 180–200 million customers thanks to the EAEU FTA, which is especially important for food and agricultural goods (Serbian Monitor, 2021; TASS, 2021). In front of the presidents of both nations, the historic Agreement on Free Trade among the People's Republic of China and the Republic of Serbia was signed on October 17, 2023, during the Third Belt and Road Initiative Forum in Beijing (China-CEE Institute, 2023). The agreement, which covers more than 20,000 products, came into effect on July 1, 2024. Approximately 90% of tariff lines may be eliminated under the FTA, and over 60% will have zero tariffs as soon as they go into effect. Up to 15 years will pass until 95% of tariff lines are fully liberalized (China Briefing, 2024). The deal offers urgent duty-free possession of fresh blueberries, apples, jams, dried plums, seeds, and beef for Serbian exports to agriculture. Within ten years, dairy, frozen raspberries, and other meat-based goods will become free of charges (Gecić Law, 2024). The

development of Serbian agri-food trade with the BRICS economies from 2019 to 2023 is shown in Table 2.

Table 2. Serbian Agri-food Exports to BRICS Countries, 2019–2023 (USD million)

Trade partner	2019	2020	2021	2022	2023
BRICS – Total agri exports (USD mn)	210	245	318	420	490
– Russia/EAEU	145	175	215	290	330
– China	12	14	18	22	28
– India	31	35	48	62	78
– Brazil / S. Africa	22	21	37	46	54
BRICS share of total agri exports	5.5%	6.3%	7.1%	8.4%	10.4%
EU share of total agri exports	60.1%	59.8%	60.4%	58.7%	57.3%

Source: SORS trade statistics; UN Comtrade (2023); USDA-FAS (2024); authors' calculations and estimates.

The BRICS share of Serbian agricultural exports increased steadily from roughly 5.5% in 2019 to 10.4% in 2023, according to the data. Due to their close proximity and longstanding bilateral economic ties, Russia and the EAEU group make up the largest BRICS market for Serbian agri-food products. Although growing from a low base, China's share is still small in total terms. This arrangement corresponds with Vladislavljev's (2025) results, which show that agricultural goods other than copper based products and minerals made up a small portion of Serbia's export portfolio to China in the first year of the China Free Trade Agreement's application.

Between USD 1.5 billion in 2014 to USD 6 billion in 2023 and then to USD 7.4 billion in 2024, bilateral commerce among Serbia and China increased by 21% annually, the largest expansion in one year in more than ten years (Vladislavljev, 2025). Nevertheless, as of 2024, copper and allied mining products accounted for 93% of Serbian exporting to China, leaving commodities from agriculture as a mostly untapped export potential.

Opportunities at the Product Level in BRICS Markets

There are several highly prospective product groups where comparative benefit meets available market prospects, according to an examination of Serbia's exports from agriculture profile in relation to BRICS market demand. A methodical summary of important agricultural goods, their production importance in Serbia, and their market value in the economies of the BRICS are shown in Table 3.

The most famous agricultural export from Serbia is raspberries. With a yearly output of about 100,000 tonnes, Serbia is one of the top manufacturers of frozen raspberries worldwide. Although Russia has historically been a significant market for Serbian raspberry exports under the EAEU FTA framework, the trajectory in the Chinese market has been more difficult: despite the FTA's implementation, raspberry exports to China dropped from USD 1.2 million in 2023 to USD 832,000 in 2024. This suggests that eliminating tariffs alone is not enough for overcoming non-tariff constraints, such as the phytosanitary certification standards, shortcomings in logistics for the cold chain, and

access to markets protocols unique to the Chinese food import regulatory framework (Vladislavljev, 2025).

Table 3. Key Serbian Agricultural Products and BRICS Market Opportunities

Product	Serbia production/ export	Key BRICS market	FTA status
Raspberries (frozen)	World leader; ~100,000 t/year	Russia, China	EAEU FTA (2021); China FTA (2024)
Wheat	~3.6 MMT production; 1.8 MMT for export	India, China	Partial; negotiation ongoing
Corn (non-GMO)	~5 MMT; global leader non-GMO	China, Russia	EAEU FTA; China FTA (2024)
Apples / Plums / Blueberries	Significant export volumes	China (priority)	Immediate zero tariff from July 2024
Beef / Meat	Growing sector; expanding exports	Russia, China	EAEU FTA; China 10- year liberalisation
Sunflower oil / Oilseeds	Important agro- industrial product	India, Russia	EAEU FTA (quota restrictions until 2025)

Source: ITA (2024); USDA-FAS (2023; 2024); Gecić Law (2024); China-CEE Institute (2023); authors' analysis.

Serbia's biggest proportional agricultural exports are non-GMO wheat and corn. In a typical yearly period, Serbia produces about 5 million metric tonnes of corn, which meets 4.2 MMT of domestic consumption and produces about 1 MMT for export (USDA-FAS, 2023). For BRICS economies like China and India, where customer and regulatory expectations for non-genetically modified kinds are growing, Serbia's place as a global leader in non-GMO maize production is especially pertinent. However, because around 80% of grain exports pass through Black Sea ports, Serbia's grain export activities were seriously affected in 2022, making it directly vulnerable to the Russia-Ukraine conflict (USDA-FAS, 2023). Plums, apples, blueberries, dried fruits, and other fresh and processed fruits are among the product categories for which the China Free Trade Agreement provides instantaneous, practical tariff decreases. Serbia's manufacturing capacity is in line with the rapidly growing middle-class demand for high-end fruit products in the Chinese and Indian markets. However, the EU food security evaluation (Food Safety News, 2024) and the Merics evaluation (Vladislavljev, 2025) both show that Serbian exports of these products to China have not yet materialized at scale, waiting for the setting up of dependable logistics routes and the resolution of phytosanitary certification barriers.

Serbia's Place in the BRICS Agricultural Cooperation Framework

Under the BRICS Agricultural Cooperation Action Plan, the BRICS nations have institutionalized cooperation in agriculture above bilateral trading arrangements. Food safety and hunger eradication, agricultural equipment transfer, facilitation of trade, management of water resources, and development financing through the New Development Bank are the five thematic pillars of the Plan, which was first introduced

at the 2017 Xiamen Summit and is extended through 2024 (Singh, 2024; Chinadaily, 2024). Table 4 evaluates each pillar's applicability to Serbia and highlights the main obstacles to participation.

Table 4. BRICS Agricultural Cooperation Framework: Relevance for Serbia and Key Constraints

Cooperation area	Relevance for Serbia	Potential constraints
Food security & hunger eradication	Access to BRICS demand markets; agri export diversification	SPS compliance differences; non-tariff barriers
Agricultural technology transfer	Precision farming; irrigation know-how	Lack of FDI-ready frameworks; IP protection gaps
Trade facilitation & tariff reduction	China FTA 2024; EAEU FTA 2021	Conflict with EU CAP alignment process
Water resource management	Only 8.3% of UAA irrigated; investment need	Capital-intensive; competing EU IPARD funds
Financing via New Development Bank (NDB)	Alternative to EU pre-accession funds	EU conditionality vs. BRICS non-conditionality tensions

Source: Singh (2024); BRICS (2023); European Commission (2024); SORS (2024); authors' analysis.

A deeper institutionalization of multilateral agricultural discourse inside the bloc is shown by the establishment of the BRICS Working Group on Agriculture, which was initially held under Russia's 2024 BRICS Chairmanship (Singh, 2024). The three priorities—sustainable output, mutual trading improvement, and food security—are generally in line with Serbia's goals for agricultural growth. However, in order to prevent conflicts with the CAP harmonization standards imposed under negotiations outlined in Chapters 11 and 12 of the EU joining procedure, Serbia's participation in BRICS agricultural governance systems must be standardized due to its status as an EU member state (EU Agricultural Policy Projects in Serbia, 2024). A potential major source of funding for Serbian farm infrastructure, especially irrigation networks, is the New Development Bank, which was founded as the global development funding arm of BRICS. Just 8.3% of Serbia's UAA was irrigated as of 2023, mostly through surface conventional methods of irrigation exploiting groundwater (SORS, 2024). Reducing the sector's weather-related productivity unpredictability requires investments in standard irrigation systems, but neither IPARD EU funding nor local public funding have been adequate to mobilize at scale (OECD, 2024). In theory, BRICS NDB cash might supplement EU pre-entrance assistance, but doing so would need Serbia formalizing its partnership with the NDB, a process that has geopolitical ramifications given the conditions of EU membership.

Discussions

The study's conclusions reveal a structural conflict at the heart of Serbia's agricultural policy perspective: the nation has real and expanding market access opportunities in the BRICS countries, but the system of institutions and regulations needed to convert these

possibilities into long-term export success is still lacking. Although Vladislavljev (2025) notes an analogous pattern in the initial year of the China Free Trade Agreement's introduction, where headline-grabbing increase in trade was primarily driven by mining-related exports rather than agricultural products, this gap between trade policy ambition and operational export capacity is not exclusive to Serbia. However, it is especially severe in the agricultural sector.

Strategic ambivalence has been a defining feature of Serbia's foreign policy orientation from a geopolitical standpoint, as it simultaneously pursues EU membership while preserving tight economic connections with Russia and forming strategic alliances with China. Serbia's alignment with the EU's Common Foreign and Security Policy dropped to 47% in 2024, the lowest level across Western Balkan candidate states, according to data from the Australian Institute of International Affairs (2025). According to a May 2025 survey, 60% of Serbian population are in favor of entering BRICS, while approval for joining the European Union has dropped to a record low of 46% against 44% opposed (Australian Institute of International Affairs, 2025). Nearer BRICS agricultural sector participation is popular locally due to these public opinion trends, but it involves the risk of joining the EU conditions, which could include the possible withdrawal of up to EUR 1.5 billion in pre-accessional financial support (nato.news-pravda.com, 2026).

Possibly the most complicated aspect is the regulatory constraint aspect. The Ministry of Agriculture, the Directorate of National Reference Laboratories (DNRL), and the inspection services are the three institutionalized components that support Serbia's food safety supervision framework. These organizations lack an integrated data exchange system and continue to be out of compliance with EU regulations, especially when it comes to inspected monitoring and sampling practices (Serbian Monitor, 2026). The fulfillment of requirements for certification particular to the BRICS countries is also hampered by this imbalance. For instance, each exporting establishment must obtain approved facility-level authorization under the Chinese food import regulation procedure. This procedure necessitates substantial administrative resources as well as cross-border veterinary and phytosanitary partnership, which Serbia is just now beginning to establish under the FTA framework (China-CEE Institute, 2023). Glauben and Djuric (2024) argue that strong protection and ideologically motivated de-risking efforts are high-risk endeavors that could jeopardize global food security, placing these bilateral concerns within the larger geopolitical dynamics underlying BRICS agricultural commerce. According to their analysis of the OECD Services Trade Restrictiveness Index, the BRICS nations have substantially enhanced their transportation services over the last ten years, coming close to G7 norms in air and maritime travel, but they are still far behind in logistical services, customs brokerage services, and e-commerce infrastructure. For Serbian exporters looking to enter BRICS countries, especially China and India, where intricate customs procedures and digital validation needs constitute significant non-tariff limitations, this infrastructural deficit is fundamental (Glauben & Djuric, 2024). A hierarchical structure of Serbian agro

products' preparedness for BRICS market penetration is revealed by the commodities-level research. Given existing trade flows, well-established infrastructure, and strong BRICS consumer demand, non-GMO corn and wheat are the closest to being ready for the market. Beef and horticulture products fall into the intermediate tier, where implementation timelines of three to five years are necessary to overcome regulatory obstacles through focused bilateral certificate arrangements. Considering their symbolic value, raspberries and processed fruit products encounter the most complicated non-tariff obstacles in Chinese and Indian markets, necessitating extensive cold-chain expenditures and bilateral administrative harmonization. There are some agri-food items with comparative advantage and promising prospects in the Chinese market, according to revealed comparative advantage indexes and tariff concessions. However, additional trade performance metrics, such as excessive product concentration, total net export competitiveness, prevalence of primary products, and minimal intra-industry trade due to severe supply limitations, reveal major flaws in Serbian agricultural products exports to China (Popović et al., 2025).

The BRICS integrated trend offers prospects for high-value processing of food from the standpoint of agribusiness expansion. Serbia's food processing sector, which employs 120,000 people and makes up one-third of all production, has the capacity to transition from exporting bulk commodities to processed agri-food goods that are more valuable in the BRICS markets (ITA, 2024). Serbia's current competitive advantage is in line with Chinese consumer preferences for premium European food items with organic standards and non-GMO verification; however, obtaining this premium necessitates substantial investments in export-market logistical services, branding, and labeling that exceed what individual small and medium-sized businesses can afford on their own.

Conclusions

In addition to recognizing a number of institutional, legal, and geopolitical obstacles that need to be methodically tackled if these possibilities are to be realized, this research has shown that BRICS membership offers significant and expanding prospects for Serbian agricultural growth. The following are the main empirical conclusions.

- First, the share of Serbian agricultural products exported to the BRICS countries increased from roughly 5.5% in 2019 to 10.4% in 2023, mostly due to increased trade with Russia and the EAEU, with China being a significant but mainly unexplored opportunity.
- Second, the China-Serbia Agreement on Free Trade of 2023/2024, which offers instant zero-tariff accessibility for important fruit products and a 10–15 year liberalization trend for beef, dairy, and frozen goods, is the most important single trade policy development for Serbian agriculture in recent years.
- Third, Serbia's agricultural growth targets are largely in line with the international frameworks provided by the BRICS Agricultural Cooperation

Arrangement, which includes the Action Plan prolonged until 2024 and the recently formed BRICS Working Group on Agriculture.

- Fourth, Serbian agriculture's small average farm dimensions and fragmented market architecture, ongoing phytosanitary and food safety regulatory deficiencies, insufficient cold-chain and export logistics infrastructure, and the geopolitical tension of simultaneously pursuing EU accession alignment and BRICS market integration all limit the realization of these possibilities.

The next set of policy suggestions are made in light of these results. In order to secure specific facility export licences for the most important product groups, the Serbian Ministry of Agriculture should allocate top priority to negotiating bilateral veterinary and phytosanitary equivalency agreements with China, India, and other BRICS nations. A hybrid finance system that maintains EU membership conditionality should be established by redesigning agricultural investment policies to allow co-financing between IPARD EU funding and possible NDB project loans. Using Serbia's current advantage in competition in the production of certified non-GMO wheat and corn, an export promotional plan should focus on the non-GMO premium category in Chinese and Indian consumer markets. Investing in logistics infrastructure, especially cold-chain facilities and intermodal transport linkages, is necessary to realize the potential for agricultural trade expansion provided by Serbia's BRICS-focused free trade agreement network.

The study's more general conclusion is that Serbia's dual approach to foreign policy, which aims to integrate into the EU while strengthening trade ties with the BRICS countries, is neither intrinsically incompatible nor necessarily viable. The rate and caliber of domestic institutional modernization, especially in agriculture regulatory and food safety systems, that establishes true compatibility between the demands of EU market access and BRICS market penetration will determine its durability. In order to estimate the dynamic trade creation and diversion effects of the China-Serbia free trade agreement across particular agricultural industry subsectors, further studies should use quantitative methods of trade modeling. Additionally, survey-driven company-level evaluation of Serbian exporters' preparedness to interact with BRICS marketplace accreditation and delivery standards should be carried out.

Acknowledgements

Paper is a part of research financed by the MSTDI RS, agreed in decision no. 451-03-33/2026-03/200009 from 5.2.2026.

Conflict of interests

The authors declare no conflict of interest.

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