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## Croatia

### Exporter Guide

### Annual

### 2006

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**Report Highlights:**

Croatia imports a significant portion of its food consumption. The prospect of EU accession, the country's steady growth in tourism, and continued economic reform could make Croatia a significant long-term importer of some U.S. food products, including seafood, wine, pet food and consumer food products. Croatian consumers are strongly anti-biotech.

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## I Market Overview

### Economic Situation

On October 3, 2005, Croatia began negotiations for accession to the European Union (EU). The prospect of EU membership will focus government efforts at economic and other reforms. For the foreseeable future, the driving force behind the Government of Croatia's agenda will be to finalize its negotiations with the European Union and obtain full NATO membership that provides a security framework for its improving economic and social prospects. Croatia is a member of the WTO and has 37 bilateral trade agreements.

There has been considerable progress in creating a market economy and establishing macroeconomic stability. The exchange rate of the kuna is stable against the Euro, interest rates have fallen, and bank lending boomed the last several years. Unemployment appears to have peaked in 2000/2001 and positive trends (lower unemployment, more employment in private sector firms) began in 2002 and continued through 2005. GDP is also steadily growing from year to year but unfortunately, Croatia's gross external debt in 2005 was \$30,200,000.

### Demographic Developments and Their Impact on Consumer Buying Habits

Croatia's population is about 4.4 million and is stable. The age distribution is as follows: 0 to 14 years/17.10 percent; 15 to 64 years/67.20 percent; 65 and over/15.70 percent (census 2001). The number of elderly and retired persons is rising, but they tend to have small pensions (the elderly are not the economic force they are in other countries).

### Food Expenditures

In 2004, total consumption of goods per household was \$11,354 (Kn 68,528). In 2004, total food and beverage consumption per household was 31.5 percent of total household consumption. Household consumption of foods and beverages increased by 14.53% in 2004 as compared to 2000. Alcoholic beverages and tobacco amounted to 4.06 percent of total household consumption in 2004 and consumption of these products has been relatively stable in the last three years.

### Size and Growth of the Consumer Foods Market

#### General

In 2004, distribution trade (including total wholesale and total retail sales and including VAT) amounted to Kn 209.94 billion (\$ 34.78 billion), which was a 16.06% increase compared to 2002. Retail trade in food, alcoholic drinks, beverages and tobacco products (excluding VAT) was Kn 20.91 billion (\$3.1 billion) in 2003, which was a 8.62% increase compared to 2001. Wholesale trade only in food, alcoholic drinks, beverages and tobacco products (excluding VAT) was Kn 17.66 billion (\$2.64 billion) in 2003.

In 2005, Croatia imported agricultural products and food valued at \$1.616 billion and exported \$920 million worth of these goods. In 2005, the agricultural trade deficit amounted to \$696 million, which was 2.58% less than in 2004. In the last few years Croatia's food imports grew as did the country's trade deficit. However, in 2005 Croatia's food trade deficit decreased slightly.

There is little specific data on sales of food products by class or type.

## Beverages

Beverage imports in 2005 were \$86.2 million, which was a 12.4 percent increase compared to 2004. Coffee and tea imports in 2005 were \$40.86 million.

In 2004, annual average consumption per household member was:

- coffee 3.38 kg ,
- tea 0.28 kg ,
- cocoa 0.35 kg,
- mineral water 31.95 kg,
- soft drinks 12.76 kg,
- fruit juices 14.63 kg,
- syrups and concentrates 4.90 kg or l
- spirits 0.90 l
- wine 11.86 l
- sparkling wine 0.08 l
- beer 20.94 l

## Mineral water

According to the association of water and soft drink producers, mineral water consumption in the first six months of 2003 was 148.5 million liters. From that number, 115.2 million liters was sourced by domestic production, which was 5 percent more than the same period last year. In 2005, imports of water (mineral and aerated waters not sweetened; ice, snow and portable water not sweeten; beverage waters, sweetened or flavored) were \$25.9 million, which was 13.1 percent more than in 2004.

## Chocolate

According to research firms, retail trade (excluding cash & carry stores) sold 1,589 MT of chocolate bars (Snickers bars, Twix bars, Mars bars, etc) or Kn 127.5 million (\$17.58 million) from February 2002 until February 2003. The top five brands in 2002 were: Kinder, Bananko, Mond, Twix, Snickers. These brands made up 64 percent of the market. Chocolate bars are only 20 percent of total Croatian chocolate consumption per year.

## Food service (restaurants)

According to the Croatian Statistical Institute, hotels and restaurants sales for foods, non-alcoholic and alcoholic drinks totaled \$600.9 million in 2004. Sales in this sector have been trending upwards (despite the slide of the dollar) from 2000 to present.

## Seafood

In spite of Croatia's lengthy Adriatic coastline, the country struggles to catch and produce seafood. Croatia lacks modern vessels, as well as the infrastructure needed to transport and process seafood. Meanwhile the demand for seafood is increasing, as Croatia becomes a more popular tourist destination. This could make Croatia an excellent market for U.S. seafood. Consumption of sea and fresh water fish in 2004, according to Croatian statistical institute, was 6.59 kilograms per capita plus additional 0.89 kg per capita of seafood and 0.81 per capita of dried, smoked, salted and other preserved or processed fish. Total imports of fish and seafood in 2005 were over \$96.9 million, which represents an increase compared to \$70.7 million in 2004.

Tourists that come to Croatia expect seafood, but Croatia suffers from a shortage of domestically caught fish. Thus, there are export opportunities for U.S. suppliers of seafood, especially for the tourist trade.

### Advantages and Challenges of U.S. Suppliers in the Croatian Market

Advantages	Challenges
Growth in tourism	Negative attitude towards foods containing or made from biotech products
Urban population growing	Reservation towards products with chemical food additives
An aging population	U.S. food products are at a tariff disadvantage compared to goods from Albania, Bosnia and Herzegovina, Bulgaria, Island, Macedonia, Moldova, Norway, Romania Switzerland, Lichtenstein, Turkey, Serbia & Montenegro, and the EU countries
Certain fruits, vegetables, dried fruits and rice are not produced domestically	High shipping costs
Shortages of some agricultural products like beef, pork, soybean meal, and certain types of seafood	Lack of awareness of U.S. goods; no concept of U.S. quality by consumers
Most importers speak English	The government adopting restrictive EU Phytosanitary regulations

## II. Exporter Business Tips

### Local Business Customs

Food retailers buy domestic and imported products from wholesalers. For the most part, the wholesale sector is completely privatized. Restructuring of the retail segment also occurred as retail chains were privatized and acquired by larger groups and new private retailers emerged on the market. The retail sector is dominated by foreign supermarket chains like: Billa, Kaufland, DM, Ipercoop, Metro, Mercator, Interspar; and domestic supermarket chains like Konzum, Getro, KTC, Kerum, Presoflex. Large supermarket chains have their own purchasing sections that buy, store, and distribute foodstuffs centrally. These purchasing units also carry out imports. However, some items are purchased through specialty wholesale importers.

### General Consumer Tastes and Preferences

Croatians, in general, reject food that contains or is made from biotech products. Consumers generally will not buy food-containing biotech content even if it is considerably cheaper.

Numbers are percentages (%)	Yes, I would consume GM	No, under no conditions I would consume GM	I don't know, not enough information	I don't care, indifferent
<b>Croatia*</b>	<b>8.2</b>	<b>66.8</b>	<b>16.4</b>	<b>8.4</b>

\*Result of research by personal survey in Croatia on a sample of n=1,000 respondents (age 15+), June 2005, survey done by Gfk Croatia

Consumption of “light” or dietary products is increasing. Sugar free chewing gums are more popular than gums with sugar. Croatians prefer chocolates to other sweets. Smoked and salted meats are popular.

According to research conducted by the Henda company and based on a random sample of 401 interviewees from all over Croatia, consumers had the following opinions regarding organics:

- 11.7% of all Croatians have never heard of organic products
- 88.3% interviewees have heard of organic food
- 42.9% of Croatians are able to distinguish organic products in shops
- 35.6% of interviewees do not consume organic food at all, and most of them 44.9% consume organic products only occasionally.
- 19.5% of interviewees regularly consume organic products

### **Food Standards and Regulations**

See GAINS Report HR6009 Food and Agricultural Import Regulations and Standards Report for information on standards and regulations and HR6010 Export Certificate Report for information on export certificates.

### **General Import and Inspection Procedures**

Incoming goods go to the custom storage area at transport terminals or airports. After goods arrive in the custom storage area, the importer or freight forwarder will start the procedures for checking and clearing goods (this needs to be done in person), which includes providing special documents that need to be sent to the Inspection Departments and Customs officials. The procedure begins with the Sanitary Inspection Department of the Ministry of Health which checks all products that are coming in contact with people except meat, which is checked by Veterinary Inspection Department from Ministry of Agriculture. Samples for food safety checking are taken from every import shipment. Product examinations have to be paid by the importer. If products are of suspicious food safety, their sales will be banned until analyses is conducted and proven otherwise. Products that can be made from biotech products are also sampled and sent to the laboratory for testing (see GAINS report, HR 5009 Biotech Annual). Custom clearance and removal from storage is carried out under the supervision of a custom officer who compares the documents with the commodities after they were checked by the sanitary or veterinary inspector for food safety. After the goods have been cleared State Inspectorate inspects goods on quality and this inspection can take place even in the warehouse of the importer. If goods don't comply with quality standards goods will be withdrawn from the market.

Custom rates and documents for imports can be found at: <http://www.carina.hr> (As this web site is in Croatian only, we advise contacting your Croatian partner or one of the freight forwarding companies to determine the proper rates)

Custom import documents should be in Croatian, but documents in English language are accepted.

### III. Market Sector Structure and Trends

#### Retail Sector Key to High Value Imports

The internationalization of the Croatian retail food trade started in 1997, with the opening of the supermarket chain (Drogerie Markt). In eight years time, supermarkets have developed rapidly in Croatia, leaving the traditional retail system for food far behind. In 2002, the share of supermarkets in overall food retailing reached 50% according to a study entitled "Rapid Rise of Supermarkets" put out by the U.S. Agency for International Development in September 2003. Until recently, small shops dominated food retailing in Croatia. However, currently most consumers shop at supermarkets.

Croatia's total imports of Consumer foods jumped from \$768 million in 2003 to \$983 million in 2005 and are still growing. Increasingly, imports are being distributed through large supermarkets.

#### Promotion and Marketing Strategies

Television is the food industry's favorite media. Supermarkets also send flyers by mail and sometimes promote themselves using consumer participation contests on TV and radio. A media campaign is considered necessary for the success of any new food product.

#### Tourism Sales

Tourism, although highly seasonal, is an important economic activity in Croatia. Each year about 6 - 10 million tourists visit Croatia (compared to Croatia's population of four million). Despite global trends, Croatia is one of the rare countries that has not recorded a decrease in tourist income. It has been estimated that tourist turnover will increase further. In 2005, Croatia's tourism industry recorded 6% more tourists and 8% more over night stays in comparison to the previous year. In 2005, 10 million tourists visited Croatia with a total of 51.4 million overnight stays.

Foreign tourists represent 85 percent of the total number of tourists. The majority of visitors come from Germany, Slovenia, Italy, Austria and the Czech Republic. Tourists coming from countries outside of Europe are mostly Americans. Tourist infrastructure is satisfactory but still developing, particularly in the main tourist destinations. (See GAINS Report HR 4012).

#### Internet Sales

Internet shopping in Croatia is still negligible. Most of the Internet shopping in Croatia includes the following: travel services, IT equipment, books, and electrical appliances. Despite this, there are a few companies providing online sales of retail food products. These companies are the following: [www.maxidiskont.hr](http://www.maxidiskont.hr) (groceries that are delivered only in Zagreb region), [www.vivatipartneri.hr](http://www.vivatipartneri.hr) (wine sales, however the web business is more for promotional purposes than for sales), [www.vinoteka.com](http://www.vinoteka.com) (wine sales), [www.puljanka.hr](http://www.puljanka.hr) (groceries delivered in some parts of Istra ), [www.advent.hr](http://www.advent.hr) (organic food shop from Istra region).

### IV Best High Value Product Prospects

The consumer food/edible fishery products that offer the best U.S. export opportunities are as follows:

Product Category	Market Size	2005 Imports	5-Yr. Avg. Annual Import Growth (2001-2005)	Import Tariff Rate 2005	Key Constraints of Market Development	Market Attractiveness for USA
Fish & Sea Food (& products)	47,164MT in 2001	\$96.9 million (51,841 MT)	Growth in \$ value : 2001/2002- 33.2% 2002/2003- 8.96% 2003/2004- -14.5% 2004/2005- 37.0%	See at: <a href="http://www.carina.hr">www.carina.hr</a>	Competition from some E.U. seafood exporting countries.	Demand and consumption should continue to grow along with tourism for the next several years.
Snack Foods	N/a	\$97 million (34,979 MT)	Growth in \$ value : 2001/2002- 35.4% 2002/2003- 27.3% 2003/2004- 19.2% 2004/2005- 7.4%	See at: <a href="http://www.carina.hr">www.carina.hr</a>	Strict biotech legislation and competition from E.U. and Croatian franchisees.	Growing market.
Pork	110,000 MT in 2002/2003	\$111.7 million (42,566 MT)	Growth in \$ value : 2001/2002- 13.5% 2002/2003- 13.7% 2003/2004- 44.2% 2004/2005- 33.1%	See at: <a href="http://www.carina.hr">www.carina.hr</a>	Mandatory Trichinosis testing.	Croatian meat processors are importing significant quantities of pork because an overall deficit in quality production
Pet Food (Dog & Cat Food-retail)	20,578MT in 2003	\$28.8 million (26,337 MT)	Growth in \$ value : 2001/2002- 33.3% 2002/2003- 21.0% 2003/2004- 14.1% 2004/2005- 18.5%	See at: <a href="http://www.carina.hr">www.carina.hr</a>	Competition from European companies and U.S. franchisees in European Union.	Croatia doesn't have pet food. production and usage of these products is expected to grow with increase in standard of living.
Wine	189,000,000lite	\$15.7 million	Growth in \$ value :	See at:	New wine law	Consumption of

	rs + 5.944 MT in 2001	(13,411 MT)	2001/2002- 24.2% 2002/2003- 74.5% 2003/2004- 40.3% 2004/2005- 3.6%	www.carina .hr	doesn't require expensive testing for wines that come from countries with which Croatia has free trade agreements and TRQs for wine reciprocity.	quality wines is expected to grow with standard of living.
Tree Nuts	N/a	\$14.4 million (2,372 MT)	Growth in \$ value : 2001/2002- 20.4% 2002/2003- 18.4% 2003/2004- 46.8% 2004/2005- 27.4%	See at: www.carina .hr	no	Grading and quantity of domestic production is insufficient.
Rice	10,299 MT in 2003	\$6.9 million (10,753 MT)	Growth in \$ value : 2001/2002- 0.2% 2002/2003- 26.7% 2003/2004- 10.5% 2004/2005- 9.5%	See at: www.carina .hr	Transshipments from Europe.	Croatia has no domestic production.
Poultry Meat only MDM	N/a	\$10 million (6,609 MT) -all poultry	Growth in \$ value : 2001/2002- -22.0% 2002/2003- -17.0% 2003/2004- 142.4% 2004/2005- 60.5%	See at: www.carina .hr	U.S. suppliers are being shut out of the MDM market due to E.U. - related phytosanitary restrictions.	Negligible domestic production of MDM.
Beef	55,000 MT in 2001	\$9.5 million (3,706 MT)	Growth in \$ value : 2001/2002- 8.3% 2002/2003- 44.2% 2003/2004- 45.9% 2004/2005- 73.7%	See at: www.carina .hr	Certificate of meat quality must contain statement that cattle wasn't fed with protein of animal origin.	Croatia has a shortage.

## V. Key Contacts and Further Information

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## APPENDIX I

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries (\$Mil) / US Market Share %	2004	1,373 / 2%
Consumer Food Imports From All Countries (\$Mil.) / US Market Share %	2004	883 / 2%
Edible Fishery imports From All Countries (\$Mil) / US Market Share %	2004	70 / 2%
Total Population (Millions) / Annual Growth Rate per 1000 Inhabitants	2004	4.4/-2.1
Urban population (Millions) / Annual Growth rate (%)	2005	n.a.
Number of Major Metropolitan Areas	2005	-
Size of the Middle Class (Millions) / Growth Rate (%)	2005	n.a.
Per Capita Gross Domestic Product (US Dollars)	2005	\$ 8,677.4
Unemployment Rate (%)	2005	12.7%*
Per capita Food Expenditures (US Dollars)	2004	\$ 1,219.45
Percent of Female Population Employed	2004	36.4%
Exchange Rate (US\$1 = X.X local currency) <sup>5/</sup>	2005	\$1=Kn5.947999**

\* ILO %

\*\*dollar slide from \$1=7.864 in 2002

## TABLE B. IMPORTS OF AGRICULTURE, FISH &amp; FORESTRY PRODUCTS

Croatia Imports (In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S Marke	
	2002	2003	2004	2002	2003	2004	2002	200
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	580	748	883	10	13	16	2%	2
Snack Foods (Excl. Nuts)	60	76	90	1	1	1	0.91%	0.21
Breakfast Cereals & Pancake Mix	5	8	11	1	1	1	0.27%	0.13
Red Meats, Fresh/Chilled/Frozen	47	55	88	0	0	0	0%	0
Red Meats, Prepared/Preserved	22	27	32	1	0	1	0.33%	0
Poultry Meat	3	3	6	0	0	0	0%	0
Dairy Products (Excl. Cheese)	36	37	46	1	0	0	0.06%	0
Cheese	25	36	45	0	0	0	0%	0
Eggs & Products	4	5	5	1	1	1	4%	0.02
Fresh Fruit	64	83	90	1	1	1	0.00%	0.00
Fresh Vegetables	21	45	45	1	1	1	0.02%	0.30
Processed Fruit & Vegetables	59	76	85	1	1	1	0.88%	0.56
Fruit & Vegetable Juices	11	14	15	1	1	1	0.07%	4
Tree Nuts	7	8	11	1	2	3	15%	20
Wine & Beer	21	31	36	1	1	1	0.15%	0.19
Nursery Products & Cut Flowers	18	24	29	1	1	1	0.04%	0.05
Pet Foods (Dog & Cat Food)	18	21	24	1	1	1	3%	3
Other Consumer-Oriented Products	162	200	223	7	9	10	5%	5
<b>FISH &amp; SEAFOOD PRODUCTS</b>	76	82	70	1	2	2	1%	2
Salmon	1	1	1	1	0	1	2%	0
Surimi	1	1	1	1	0	0	2%	0
Crustaceans	4	4	4	1	1	1	0.16%	0.46
Groundfish & Flatfish	8	8	10	1	0	1	0.23%	0
Molluscs	10	15	19	1	1	2	9%	6
Other Fishery Products	53	54	35	1	1	1	0.27%	1
<b>AGRICULTURAL PRODUCTS TOTAL</b>	955	1,181	1,373	22	21	27	2%	2
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	1,183	1,475	1,686	24	23	29	2%	2

NA - Data not available (not reported)      Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

## TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS &amp; EDIBLE FISHERY PRODUCTS

## CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400

Reporting Country: Croatia Top 15 Ranking	Import		
	2002	2003	2004
	1000\$	1000\$	1000\$
Italy	88,657	115,276	128,129
Germany	71,246	91,587	106,906
Austria	57,387	72,589	88,933
Areas NES	1	0	79,488
Netherlands	41,561	52,929	65,915
Hungary	52,565	50,959	53,785
Poland	23,292	29,295	38,017
Spain	17,548	26,777	36,058
Bosnia-Hercegovina	16,158	23,196	30,231
Czech Republic	10,746	16,862	21,181
Denmark	11,311	19,487	19,959
France	10,006	12,918	17,908
Ecuador	13,336	15,606	17,425
<b>United States</b>	<b>10,267</b>	<b>12,897</b>	<b>15,917</b>
Belgium	9,260	11,299	14,391
Other	146,942	196,631	149,002
World	580,355	748,357	883,278

**FISH & SEAFOOD PRODUCTS - 700**

Reporting Country: Croatia Top 15 Ranking	Import		
	2002	2003	2004
	1000\$	1000\$	1000\$
Spain	12,480	19,108	16,766
Italy	8,203	6,345	7,185
Argentina	3,438	2,849	4,537
Denmark	8,387	7,829	4,307
Sweden	3,855	3,013	4,207
Thailand	2,644	2,899	4,091
Norway	3,980	2,986	3,861
Falkland Islands (Islas Malvinas)	208	2,787	3,139
France	241	9,887	2,030
Ireland	2,983	1,809	1,761
United Kingdom	553	1,206	1,737
<b>United States</b>	<b>1,047</b>	<b>1,534</b>	<b>1,724</b>
Iceland	1,180	1,455	1,631
Areas NES	0	0	1,559
Netherlands	3,692	9,448	1,305
Other	23,000	8,757	9,927
World	75,897	81,926	69,765

*Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office*