



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.09

Voluntary Report - public distribution

**Date:** 11/18/2004

**GAIN Report Number:** BK4025

## Bosnia-Herzegovina

### Exporter Guide

### Annual Report

## 2004

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**Report Highlights:**

Bosnia and Herzegovina (BiH) imports around two thirds of its overall food needs. The market for processed foods focuses on value rather than quality as consumers seek to obtain the most for their money. Food import tariffs are low compared to other countries in the region. Challenges to exporters include a complicated dual system of government, low incomes, and poor infrastructure. This report contains marketing tips, information on importing foods, and important points of contact.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Unscheduled Report  
Vienna [AU1]  
[BK]

## I. Market Overview

### ***Economic situation***

The economy in Bosnia and Herzegovina (BiH)<sup>1</sup> is still recovering from the 1992-1995 war and from the transition from a socially planned to a market economy. In recent years the economy has been driven by donations from the international community and Gross Domestic Production (GDP) growth reflected more the inflow of external assistance than an increase of domestic production. Per capita GDP in 2003 has been estimated at approximately US\$ 1,822, with a total estimated nominal GDP of approximately US\$ 7 billion. The real GDP growth rate in 2003 was estimated at 3.5%, according to official figures. The IMF projection for 2004 real GDP growth is approximately 5%. According to official figures, BiH ran a current account deficit of approximately \$US 2 billion in 2003, or roughly 30 percent of the country's GDP. The average net monthly wage in the first part of 2004 was \$308 (this figure is higher in the Federation than in the Republika Srpska).

A degree of macro-economic stability has been achieved with the introduction of a Central Bank, adoption of the currency board and creation of a single currency, the Konvertibilna Marka (Convertible Mark, KM). The currency board ensures that KM is fully backed by hard currency or gold, and the exchange rate is fixed at approximately 2 KM to the Euro. Therefore, prices in BiH have remained stable since the introduction of the KM. Inflation in 2003 was only 0.6%, a rate that has remained steady in 2004.<sup>2</sup> At the end of 2003 the entities ceded authority over all indirect taxes to the State-level government, which will ultimately result in a single Value-Added Tax (VAT) for the whole country.

### ***Structure of the economy***

The structure of the BiH economy is changing quite slowly. GDP composition by sector in 2001 was: agriculture 13%, industry: 40.9%, services: 46.1%. Industrial production growth rate in 2003 was around 5%.

Although there has been a significant growth in the number of registered micro, small and medium enterprises, economic activity is still characterized by the existence of large state owned enterprises. These large enterprises operate with significant losses, at less than full capacity, and with out-dated technology and management techniques.

The official unemployment rate remains high, above 40%. It is estimated that an actual unemployment is around half of it, because of the black economy existence.

### ***Business environment***

BiH is composed of two entities with significant differences with regard to the business environment. Although there has been an effort to create a single market in BiH, significant legislative, regulatory and institutional differences between the Entities persist. Between the two entities, factors such as business registration requirements and most taxation are separate and different. The creation of a single economic space is a precondition for the regeneration of the post-war Bosnian economy, the transformation from a planned to a market economy, and greater integration into European and world trade structures. Significant barriers to internal and external trade and foreign direct investment remain, and

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<sup>1</sup> According to the Dayton Peace Agreement signed in December 1995, Bosnia and Herzegovina (BiH) is divided into two Entities: the Federation of Bosnia and Herzegovina (F BiH) and Republika Srpska (RS). There is also the Brcko District with a special administrative status. Understanding this dual governmental structure is important to doing business in the country.

<sup>2</sup> Sources: Central Bank of Bosnia and Herzegovina and Country Commercial Guide

there are weaknesses in the legal base related to competition, public procurement, financial services, standards and regulations, and the regulation of essential services.

**Foreign Trade**

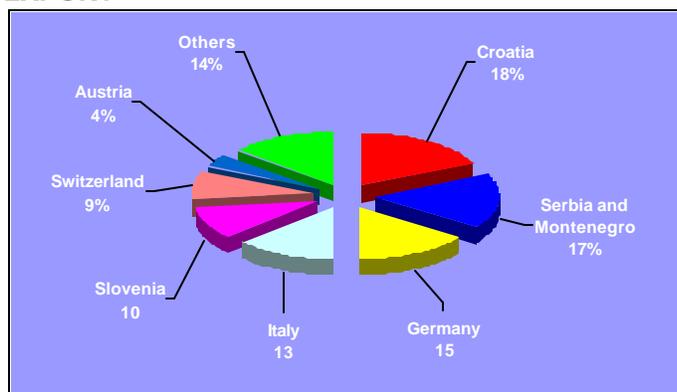
In 2003, for every dollar of exports, BiH took in more than three dollars in imports. Total exports grew from \$758 million to \$1.678 mil. from 1998 to 2003, while imports rose from \$4.319 million to \$6.078 million in the same period. Agricultural imports represent about 30% of total imports, and about 10% of total exports. Efforts have been made recently to liberalize trade, especially within the Southeast European region. Free trade agreements have been signed with many countries in the region (Croatia, Serbia and Montenegro, FYR Macedonia, Slovenia, Albania, Romania, Bulgaria, Moldova and Turkey) in the framework of an intra-regional trade co-operation. The principal trading partners are the European Union (EU) and the countries of ex-Yugoslavia.

Trade volume, million \$	1998	1999	2000	2001	2002	2003
Exports	758	991	1.557	1.610	1.484	1,678
Imports	4.319	4.921	5.368	5.850	5.959	6.078

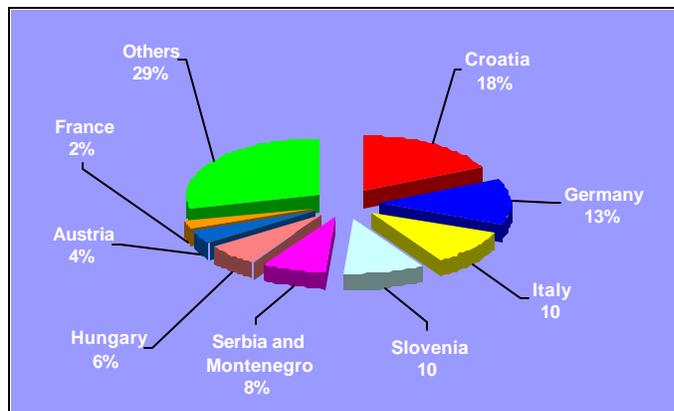
Source: FIPA and Central Bank of BiH

Major BiH trade partners (year 2003):

**EXPORT**



Source: Central Bank of BiH

**IMPORT**

Source: Central Bank of BiH

Croatian, Slovenian, German, Serbian, Hungarian and Italian, and processed food products dominate the market. The most imported food products in 2003 were beverages (alcoholic and non-alcoholic) and mineral water, grains, tobacco products, sugar and dairy products.

Imports of U.S. consumer oriented products and seafood products to BiH from 1997- 2003 were minor. Imports of U.S. origin bulk commodities (mostly wheat and sunflower seed oil) are part of a U.S. food donation program to BiH.

BiH is not a member of the World Trade Organization (WTO) but has started accession negotiations. BiH's Working Party was established in July 1999 and a draft Memorandum on Foreign Trade Regime was submitted to the WTO in August 2002. The first working party session was held in November 2003 and the second one is scheduled for December 2004.

### ***Size and Growth of Consumer Foods Market***

Unfortunately, there has been no information on size and growth of the market.

### ***Market Opportunities for High-Value Consumer Foods/Beverages and Edible Fishery Products***

#### *Challenges to Marketing High Value U.S. Foods in BiH:*

- The weak economy affects consumer-purchasing power. An average net wage is lower than in any country in the region and the unemployment rate is high. Therefore, people are more interested in price than in quality.
- Quality control among locally produced and imported products is often poor in part because BiH government laboratories work with out-dated technology and are ill-equipped. Therefore, labeling requirements are often not met and low-quality products may be found on market at that undercut other products.
- There is still a lot of smuggling.
- Fraud and corruption are still a problem, especially in relation to taxation and import duties.

However, high quality U.S. products could find small, but growing market due to the fact that consumers awareness is improving and eventually will result in spending more money on high quality food products. Californian wines (lower quality) and almonds are already present on the market

### ***Food Expenditures and Consumption***

It is estimated that a four-person family spends around \$3,500 annually (2003 est.) on a 'basket' of basic food products. However, the general opinion is that the actual figure is being much higher and there are no reliable official statistics on food consumption. Officially, changes in food expenditures are not significant because the 'basket' of basic food products is always the same and the retail prices are quite stable.

Since an average monthly income is around \$300, an average pension around \$100 (2003), with the official unemployment rate around 40%, many do not have enough money to buy food. According to World Bank's poverty reduction strategy paper, one fifth of total BiH population is on the edge of poverty.

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

BiH has a population of around 4 million and an average BiH household is composed of 3.6 members. A single parent heads slightly over one in ten households. The population growth rate is about 1.38% (2001 est.).

The rural population decreased significantly as the result of the war. Most of the rural population moved to urban areas or went to other countries as refugees and have been slow to return. In some areas, landmines remain a barrier to agricultural production although there is a significant international demining effort.

The number of single households has not increased significantly because many of young people live with their parents. People are also waiting longer before they have children because of difficult economic situation and housing problems.

***Advantages and Challenges for the U.S. Exporters***

Advantages	Challenges
Insufficient domestic food production, imports nearly three times larger than exports	Long distance, bad transportation conditions, absence of highways, limited railway service
Increased urban population	Weak economy affects consumer purchasing power, low average net wage, high unemployment rate
High quality of U.S. products	Consumers more interested in price than in quality
Import duties low if compared to other counties in the region	Illegally imported and low-quality products compete with legitimately imported foods
Relatively low costs for introduction and promotion of new products using local broadcast and print media or in-store promotions	Different distribution systems in the two Entities, different taxation system; difficulties in finding a reliable and capable local partner to carry out marketing and distribution
Increasing number of large retail supermarkets	Domestic market flooded with products imported from ex-Yugoslavia neighboring countries (FTAs) and EU countries
Fascination with American culture (language, music, TV shows, fashions) carries over to American food, such as famous "Coca Cola"	Reservations towards GM foods due to a lack of consumer education on the subject and a desire to meet EU requirements

**II. Exporters Business Tips*****Local business customs***

Importers/wholesalers/distributors provide transportation, product storage, market information, financing, and some insurance.

Finding an agent and/or distributor is the most effective way to market consumer goods. The U.S. Foreign Commercial Service can help you locate qualified distributors. For more information, please see: <http://www.buyusa.gov/bosniaandherzegovina/en/>

The distribution systems are different for the F BiH and the RS because of differing legal frameworks. There have been efforts lately to harmonization rules between the two entities and currently the differences are related mostly to the Entities' tax regimes. It is often necessary to develop relations with distributors in both Entities in order to cover the whole country.

Some foreign companies have established a representative office in order to control distribution channels (e.g. P&G and Wrigley's). Wrigley's relies on three distributors and a number of small jobbers to penetrate the market. The company also has sales offices across the country to coordinate marketing efforts. Some companies rely on strong local companies to control distribution channels. local companies prefer to do business with people they know well. Business friendships are highly valued. Establishing a local presence and employing local people signal long-term commitment to the market, and are well received (Country Commercial Guide).

***General Consumer Tastes and Preferences***

Generally speaking, most consumers view price as the primary factor in their food purchasing decision. Preferences tend toward large packages at lower prices. Shopping

centers are becoming an increasingly popular retail food sales point. Most of people usually buy nonperishable foods at large supermarket centers once or twice a month. Perishable foods, fruits, vegetables, bread and fresh meat are usually bought at small grocery stores, specialized stores or green markets.

Consumption of red meats is relatively high. There are ongoing outbreaks of animal diseases such as Q fever and classical swine fever although these outbreaks do not appear to have shaken consumer confidence. BSE and FMD have not been reported in BiH. Traditionally, consumption of beef and veal is the higher than poultry, pork or lamb. Pork consumption is much higher in the RS than in the F BiH because of F BiH's large Muslim population.

A typical Bosnian meal is composed of either red or white meat, potatoes and some other vegetables. Rice is a common dish that on average is eaten once a week. Apples are the most popular fruit. There are only few ethnic restaurants (e.g., Italian, Chinese, Mexican). Fish consumption is traditionally low (around 2 kilograms/year).

The demand for organic foods is quite low. Imported organic foods are usually sold in specialized stores, and are consumed by the ex-patriot community and as a pseudo-medicinal treatment for the sick.

Consumers generally dislike genetically modified (GM) foods. Advanced consumers think that they don't have enough information to be pro or against biotech products, and that they need more education in order to decide whether or not they'll consume them. More information could change consumer attitudes towards biotechnology in a positive direction. Additionally, more knowledgeable consumers say they would eat biotech foods after proper testing and labeling, so they could decide whether they want to buy such a product.

In general, most people prefer to prepare meals at home from fresh food items than buy ready-to-eat and frozen meals. There is the belief that fresh cooked food is healthier and that frozen ready to eat foods are overpriced. Supermarkets do offer ready to eat meals but at relatively high prices.

There is a small but well off market segment made up of all of the foreigners in BiH (especially in Sarajevo and Banja Luka) that work for foreign humanitarian and military organizations.

### ***Food Standards and Regulations***

Please refer to FAIRS Report [BK 4018](#) (this report may be downloaded from <http://www.fas.usda.gov/scripts/attacherep/default.asp>).

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

Foreign exporters can import food products into BiH using a locally registered office or a local company/shipping agency registered for import activities. It is common for agents to help with food import regulations.

Prior import approvals and licenses are required for live animals and animal products and seeds and pesticides. For animals and certain animal products the State Veterinary Administration (SVA) provides prior approvals and final approval for live animals, embryo and semen is provided by the Ministry of foreign Trade and Economic Relations (MOFTER). For seeds, planting materials and pesticides the entities' agriculture ministries provide prior approvals and MOFTER issues import licenses. Forms are available at the SVA and the

Ministries (see Key Contacts and Further Information). It is important to note that requirements for prior import approvals differ between the two Entities.

All food products must be accompanied with standard documents that follow each shipment and by health certificates issued by relevant authorities of exporting countries (e.g. veterinary certificate for meat and meat products, phyto-sanitary certificates for fruits, vegetables, seeds etc.) and are subject to veterinary and phyto-sanitary inspections at border crossings and sanitary and market inspections at customs points.

Sanitary inspectors visually inspect all food for sanitary wholesomeness prior to customs clearance visually and take samples for laboratory tests (Appendix II). Imported goods are held at the customs point until testing is complete.

Market inspectors issue the quality certificates at inspection points (see Appendix I). Quality control inspections are done at the exporter/importer's written request, which should be received at least 24 hours prior to the customs clearance. The request for quality control must be accompanied with basic documents that follow each shipment, translated into Bosnian/Croatian for the F BiH or into Serbian for the RS. The following information must be provided in the documents: type and name of product, country of origin, exporter's name, manufacturer's name, type and number of transport means, port of loading and unloading, total pieces, packaging unit, gross and net weigh and product's quality basic data. If the same product is imported again, at it has been tested within 90 days, only visual check up is done. Both Entities have officially recognized laboratories to test imported food products

If a market inspector rejects an importer's request, goods are stored until the procedure is complete - the inspector can order the return or destruction of goods if necessary at the cost of importer, or can order certain changes prior to customs clearance.

### **III. Market Sector Structure and Trends**

#### ***Domestic Industrial Capacity***

Before the war, the food industry was concentrated into large state-owned companies that were also involved in primary agricultural production, processing and wholesale and retail operations. However, at the end of the war, the agro-processing industry was operating at less than 10% of its pre-war capacity due to heavy damage to buildings and equipment. In addition, the raw material supply and sales channels had been disrupted. The agricultural production and the food industry continued to suffer during the transition from a planned to a market economy. Many of pre-war companies are still being privatized and are racking up losses. There are still a few companies that have rebuilt successful fruit, vegetable, and meat processing operations.

In general, the BiH food industry is still too small and inefficient to compete with large foreign industries. Domestic food production is insufficient and covers approx. 30 – 35% of total needs.

#### ***Food Retail Sector***

In general, small retailers are slowly losing out to large wholesalers with developed retail operations. Lately, appearance of shopping centers (malls) has been significant and has introduced big changes in the retail market. There are yet not many foreign retail chains, except Slovenian "Mercator", French Interex (discount house that attracts price-concerned consumers), Croatian "Velpro" (cash and carry) and Serbian C Market. Those centers import and distribute food and offer a great variety of fresh fruits and vegetables, fresh

meat, exotic and new-to-market foods, and ready-to-eat foods. They also provide good professional service, restaurants with ready meals at favorable prices and lots of fun (performances for kids, clowns, and win prize games/ lottery). Quite often, they organize in-store promotions and tasting of products and provide small gifts with purchased products. A special discount is offered to faithful customers. Food items are also sold in a number of small independent groceries and open markets.

### ***Hotel, Restaurant and Institutional (HRI)***

Total turnover in catering 1998 –2002<sup>3</sup>

Year	F BiH		RS	
	Total turnover (000 KM)	Food and beverages share (%)	Total turnover (000 KM)	Food and beverages share (%)
1998	68.831	51.37	41.996	74.27
1999	66.794	54.98	50.566	72.11
2000	68.900	50.70	54.584	69.69
2001	60.784	N/A	48.312	70.58
2002	71.010	N/A	47.917	68.00
2003	76.270	N/A	N/A	N/A

HRI prepare meals themselves. They buy ingredients from various suppliers, from small grocery stores and green markets to big producers, retail centers and wholesalers, depending on their size and the number of meals.

Tourism, tourism promotion, and the hospitality and catering industry have been regulated at the Entity level. This has resulted in business-inhibiting differences in requirements for companies and individuals working in the sector, differences in the way funding for tourism promotion is collected and distributed, and differences in the way accommodation is classified.

Lately, there has been a growing consensus that tourism can be a major source of job growth and foreign exchange earnings for Bosnia and Herzegovina. According to foreign experts, BiH has a large potential in niche market tourism and tapping into the world tourism market could have huge benefits for the BiH economy.

### ***Promotional and Marketing Strategies***

Advertising that used to be the single marketing tool in BiH is now combined with direct marketing (door-to-door contacts, material distribution and special offers). The most popular advertising media are television, radio, newspapers and magazines. In addition, outdoor advertising is becoming more and more popular (billboards, bulletins, and displays on in urban areas and frequent roads). Recent data indicates that 68 percent of advertising is conducted through TV, followed by 20 percent through outdoor advertising, while radio and print media account for 6 percent each (Country Commercial Guide 2004). Also, cable television is rapidly developing in urban areas of BiH. Radio is the most popular marketing tool at the local level. Direct mailing is also becoming popular advertising tool (leaflets placed under car windshield wipers, mailbox brochures, or advertising materials placed in newspapers). Quite often, in-store promotions and informal gatherings are used for

<sup>3</sup> Sources : F BiH and RS Institutes for Statistics

presentations of the products. Supermarkets often deliver flyers, informing on their products, prices and special discounts

Trade events and fairs are good way to market products and services to BiH and to locate partners and distributors. The trade fair sector in BiH has been growing rapidly lately. Fairs provide opportunities for local and foreign companies to establish business connections. Trade events are held throughout BiH. The Sarajevo "Agro-food" fair is the most popular in the F BiH and for the RS the Banja Luka "Food and Beverages" fair. Regional centers like Zenica, Tuzla, Mostar and Bihac are very active in trade promotion.

Less than 3% of the BiH population uses the Internet regularly, and food sales, if any, are very small.

#### IV. Best High-Value Products Prospects<sup>4</sup>

PRODUCT	2001 IMPORTS (in million KM)	2002 IMPORTS (in million KM)	2003 IMPORTS (in million KM)
Tobacco products	98	152	153.4
Beverages and mineral water	96.6	106.6	110.3
Beef	64.7	79.9	98
Bear	63.6	73.4	72
Chocolate	58.3	77.9	84.2
Coffee	52.3	42	45.7
Cheese	35.4	32.5	35.7
Biscuits and cookies	30.7	36	43.5
Sauces and spices	30	29.2	30.9
Fish and Seafood	22.2	41.9	40.6
Wine	14	16.5	19.9
Ice-cream	10.3	11.2	13.9
Walnuts, almonds, hazelnuts, pistachios, peanuts	4.5	9.1	13.7

Currency note: US\$1 = KM 1.50 on 17/11/04

<sup>4</sup> Source: Entities' statistical institutes

## V. Key Contacts and Further Information

FAS/USDA  
US Embassy to BiH  
71000 Sarajevo  
Bosnia and Herzegovina  
Tel.: +387 33 445 700, x2099  
Fax: +387 33 212 692  
Contact person: Sanela Stanojcic  
E-mail: Sanela.Stanojcic -Eminagic@usda.gov

State Veterinary Office  
Radiceva 8/II  
7100 Sarajevo  
Contact person: Darko Cobanov  
Bosnia and Herzegovina  
Tel. +387 33 258 840  
Fax +387 33 265 620  
E-mail: info@vet.gov.ba  
<http://www.vet.gov.ba/>

Ministry of Foreign Trade and Economic Relations  
Musala 9  
71000 Sarajevo  
Contact person: Marijo Perc  
Tel. +387 33 663 863 (ext. 239)  
Fax: +387 33 220 546  
E-mail: perc@bih.net.ba

American Chamber of Commerce in Bosnia and Herzegovina  
Ms. Dzenita Becic, Executive Director  
Zmaja od Bosne 4, 71000 Sarajevo  
Tel: 387-33-269-230 Fax: 387-33-269-232  
Email: [amcham@lsinter.net](mailto:amcham@lsinter.net)

BiH Chamber of Economy  
Branislava Djurdjeva 10  
71 000 Sarajevo  
Tel. +387 33 663 370 and 663 636  
Fax: +387 33 663 632  
Email: presidoffice@komorabih.com  
<http://www.komorabih.com/>

F BiH Chamber of Economy  
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71 000 Sarajevo  
Tel. +387 33 663 370 and 667 940  
Fax: +387 33 663 632 and 663 635  
E-mail: webmaster@komorabih.com  
<http://www.kfbih.com/eng/index.htm>

RS Chamber of Commerce  
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78 000 Banja Luka  
Tel. +387 51 301 908 and 301 838  
Fax: +387 51 301 838  
<http://www.pkrs.inecco.net/>

FIPA - Foreign Investment Promotion Agency  
Mr. Mirza Hajric, Director  
Phone: 387-33-278-080  
Fax: 387-33-278-081  
Email: [hajric@fipa.gov.ba](mailto:hajric@fipa.gov.ba)  
Branilaca Sarajeva 21/III  
71000 Sarajevo  
Bosnia and Herzegovina  
Web Site: [www.fipa.gov.ba](http://www.fipa.gov.ba)

Institute for Accreditations of Bosnia and Herzegovina  
Mr. Zarko Petrovic, Director  
Hamdije Cemerlica 2/7  
71000 Sarajevo  
Phone/Fax: 387-33-715-540

APPENDIX I. STATISTICS<sup>5</sup>

TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) <sup>1/</sup>	2003	224/ 3
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) <sup>1/</sup>	2003	389/ 1
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) <sup>1/</sup>	2003	17/ 1
Total Population (Millions) / Annual Growth Rate (%)	2002/ 2001	3,828/ 1.3%
Urban Population (Millions) / Annual Growth Rate (%)	n/a	n/a
Number of Major Metropolitan Areas <sup>2/</sup>	2002	0
Size of the Middle Class (Millions) / Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)	2003	1.822
Unemployment Rate (%)	2003	42%
Per Capita Food Expenditures (U.S. Dollars) <sup>3/</sup>	2003	875
Percent of Female Population Employed	2000	34.5%
Exchange Rate	10/29/04	US\$1.00 = 1.54 KM
Footnotes:		
<sup>1/</sup> Data from FAS' web-enabled UNTrade database (HS 6-digit option; Import Market Share BICO 3-Year format)		
<sup>2/</sup> There are no metropolitan areas with population in excess of 1,000,000		
<sup>3/</sup> The figure presents food expenditures for a basket composed of necessary food products.		

<sup>5</sup> Sources: BiH Agency of Statistics, FBiH and RS Institutes of Statistics

TABLE B. CONSUMER FOOD &amp; EDIBLE FISHERY PRODUCT IMPORTS

Bosnia-Herzegovina Imports (In Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
<b>BULK AGRICULTURAL TOTAL</b>	NA	NA	57	NA	NA	6	0	0	11
Wheat	NA	NA	26	NA	NA	6	0	0	22
Coarse Grains	NA	NA	1	NA	NA	0	0	0	0
Rice	NA	NA	3	NA	NA	0	0	0	0
Soybeans	NA	NA	1	NA	NA	0	0	0	0
Other Oilseeds	NA	NA	1	NA	NA	0	0	0	0
Cotton	NA	NA	1	NA	NA	0	0	0	0
Tobacco	NA	NA	9	NA	NA	1	0	0	3
Rubber & Allied Gums	NA	NA	1	NA	NA	0	0	0	0
Raw Coffee	NA	NA	9	NA	NA	0	0	0	0
Cocoa Beans	NA	NA	1	NA	NA	0	0	0	0
Tea (Incl. Herb Tea)	NA	NA	1	NA	NA	0	0	0	0
Raw Beet & Cane Sugar	NA	NA	3	NA	NA	0	0	0	0
Pulses	NA	NA	4	NA	NA	1	0	0	3
Peanuts	NA	NA	1	NA	NA	0	0	0	0
Other Bulk Commodities	NA	NA	1	NA	NA	0	0	0	0
<b>INTERMEDIATE AGRICULTURAL TOTAL</b>	NA	NA	167	NA	NA	1	0	0	0
Wheat Flour	NA	NA	1	NA	NA	0	0	0	0
Soybean Meal	NA	NA	1	NA	NA	0	0	0	0
Soybean Oil	NA	NA	1	NA	NA	0	0	0	0
Vegetable Oils (Excl. Soybean Oil)	NA	NA	37	NA	NA	1	0	0	0
Feeds & Fodders (Excl. Pet Foods)	NA	NA	8	NA	NA	0	0	0	0
Live Animals	NA	NA	45	NA	NA	0	0	0	0
Hides & Skins	NA	NA	4	NA	NA	0	0	0	0
Animal Fats	NA	NA	1	NA	NA	0	0	0	0
Planting Seeds	NA	NA	3	NA	NA	0	0	0	0
Sugars, Sweeteners, & Beverage Bases	NA	NA	46	NA	NA	0	0	0	0
Essential Oils	NA	NA	8	NA	NA	0	0	0	0
Other Intermediate Products	NA	NA	12	NA	NA	0	0	0	0
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	NA	NA	389	NA	NA	2	0	0	1
Snack Foods (Excl. Nuts)	NA	NA	48	NA	NA	0	0	0	0
Breakfast Cereals & Pancake Mix	NA	NA	2	NA	NA	0	0	0	0
Red Meats, Fresh/Chilled/Frozen	NA	NA	19	NA	NA	0	0	0	0
Red Meats, Prepared/Preserved	NA	NA	24	NA	NA	0	0	0	0
Poultry Meat	NA	NA	8	NA	NA	0	0	0	0
Dairy Products (Excl. Cheese)	NA	NA	42	NA	NA	0	0	0	0
Cheese	NA	NA	16	NA	NA	0	0	0	0
Eggs & Products	NA	NA	1	NA	NA	0	0	0	0
Fresh Fruit	NA	NA	39	NA	NA	0	0	0	0
Fresh Vegetables	NA	NA	11	NA	NA	0	0	0	0
Processed Fruit & Vegetables	NA	NA	18	NA	NA	1	0	0	0
Fruit & Vegetable Juices	NA	NA	2	NA	NA	0	0	0	0

Tree Nuts	NA	NA	4	NA	NA	1	0	0	7
Wine & Beer	NA	NA	31	NA	NA	0	0	0	0
Nursery Products & Cut Flowers	NA	NA	6	NA	NA	0	0	0	0
Pet Foods (Dog & Cat Food)	NA	NA	1	NA	NA	0	0	0	0
Other Consumer-Oriented Products	NA	NA	115	NA	NA	2	0	0	2
<b>FOREST PRODUCTS (EXCL. PULP &amp; PAPER)</b>	NA	NA	38	NA	NA	1	0	0	0
Logs & Chips	NA	NA	1	NA	NA	0	0	0	0
Hardwood Lumber	NA	NA	1	NA	NA	0	0	0	0
Softwood and Treated Lumber	NA	NA	1	NA	NA	0	0	0	0
Panel Products (Incl. Plywood)	NA	NA	22	NA	NA	0	0	0	0
Other Value-Added Wood Products	NA	NA	13	NA	NA	1	0	0	0
<b>FISH &amp; SEAFOOD PRODUCTS</b>	NA	NA	17	NA	NA	1	0	0	1
Salmon	NA	NA	1	NA	NA	1	0	0	3
Surimi	NA	NA	1	NA	NA	0	0	0	0
Crustaceans	NA	NA	1	NA	NA	0	0	0	0
Groundfish & Flatfish	NA	NA	3	NA	NA	1	0	0	0
Molluscs	NA	NA	1	NA	NA	1	0	0	6
Other Fishery Products	NA	NA	13	NA	NA	1	0	0	0
<b>AGRICULTURAL PRODUCTS TOTAL</b>	NA	NA	613	NA	NA	8	0	0	1
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	NA	NA	669	NA	NA	8	0	0	1

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

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS  
CONSUMER-ORIENTED AGRICULTURAL TOTAL

Reporting Country: Bosnia-Herzegovina Top 15 Ranking	Import		
	2001	2002	2003
	1000\$	1000\$	1000\$
Croatia	0	0	104,308
Slovenia	0	0	70,315
Austria	0	0	28,171
Germany	0	0	27,067
Italy	0	0	26,807
Poland	0	0	18,656
Netherlands	0	0	18,330
Ecuador	0	0	17,512
Hungary	0	0	13,601
Turkey	0	0	6,997
Spain	0	0	6,878
Serbia & Montenegro	0	0	6,134
Areas NES	0	0	5,021
Czech Republic	0	0	4,060
France	0	0	3,481
Other	0	0	31,498
World	0	0	388,861

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

#### FISH & SEAFOOD PRODUCTS

Reporting Country: Bosnia-Herzegovina Top 15 Ranking	Import		
	2001	2002	2003
	1000\$	1000\$	1000\$
Croatia	NA	NA	7,425
Argentina	NA	NA	2,487
Italy	NA	NA	1,789
Slovenia	NA	NA	1,336
Spain	NA	NA	1,291
Thailand	NA	NA	1,240
Areas NES	NA	NA	311
Germany	NA	NA	208
Denmark	NA	NA	160
Falkland Islands (Islas Malvinas)	NA	NA	158
Peru	NA	NA	129
Turkey	NA	NA	99
United States	NA	NA	92
Estonia	NA	NA	79
France	NA	NA	74
Other	0	0	416
World	0	0	17,301

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