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Croatia

Exporter Guide

Annual

2005

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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 imports of consumer food items have more than tripled from $267 million in 1993 to $883 million in 2004. 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. Inflation and the consolidated central government deficit have been reduced (with a major lapse in 2003), 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 2001 and positive trends (lower unemployment, more employment in private sector firms) began in 2002 and continued through 2004. GDP is also steadily growing from year to year, but unfortunately Croatia's external debt has grown from 62.2% of GDP in 2002 to 82.1% of GDP in 2004.

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 2003, total consumption of goods per household was $9,788 (Kn 65,593). In 2003, total food and beverage consumption per household was 32.6 percent of total household consumption. Household consumption of foods and beverages increased by 13.46% in 2003 compared to 2000. Alcoholic beverages and tobacco amounted to 4.19 percent of total household consumption in 2003 and consumption of these products has been relatively stable in the last three years.

Size and Growth of the Consumer Foods Market

General

In 2003, distribution trade (including total wholesale and total retail sales and including VAT) amounted to Kn 205.64 billion ($ 30.69 billion), which was a 13.69% increase compared to 2002. Retail trade in food, alcoholic drinks, beverages and tobacco (excluding VAT) was Kn 20.72 billion ($2.63 billion) in 2002, which was a 7.64% increase compared to 2001. Wholesale trade only in food, alcoholic drinks, beverages and tobacco (excluding VAT) was Kn 15.56 billion ($1.98 billion) in 2002.

In 2004, Croatia imported agricultural products and food valued at $1.45 billion and exported $740 million worth of these goods. In 2004, the agricultural trade deficit amounted to $714.6 million, which was 46.6 percent higher than in 2003. The deficit has been growing the last few years as food imports have moved upwards.

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

Beverages

Total beverage (including alcoholic drinks, tea, coffee) imports in 2004 were about $156.2 million, which was a 43.4 percent increase compared to 2002.

In 2003, annual average consumption per household member was:

- coffee 3.54 kg ,
- tea 0.25 kg ,
- cocoa 0.36 kg,
- mineral water 36.84 l,
- soft drinks 12.10 l,
- fruit juices 15.26 l,
- syrups and concentrates 5.54 kg or l
- spirits 1.02 l
- wine 12.79 l
- sparkling wine 0.06 l
- beer 22.27 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 from domestic production, which was 5 percent more than the same period last year. In 2004, imports of water (mineral and aerated waters not sweetened; ice, snow and portable water not sweeten; beverage waters, sweetened or flavored) was $22.99 million, which was 35.2 percent more than in 2002.

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. Top 5 brands in 2002 were: Kinder, Bananko, Mond, Twix, Snickers. They form 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 $516.5 million in 2003. Sales in this sector have been trending upwards (regardless of the dollar slide) from 2000 to present.

Seafood

In spite of Croatia's lengthy Adriatic coastline, the country is struggling 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 2003, according to Croatian statistical institute, was 6.34 kilograms per capita plus additional 1kg per capita of seafood and 0.74 per capita of dried, smoked, salted and other preserved or processed fish. Total imports of fish and sea-food in 2004 were $70 million, which represents a slight decrease compared to $82 million in 2003. At the same time, U.S. market share remained stable at $2 million.

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 Macedonia, Bosnia and Herzegovina, Turkey, Serbia & Montenegro, Albania, Moldova and the EU, EFTA, CEFTA 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 is beginning to adopt 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; 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. According to some newspaper polls, 80 percent of the population is opposed to the technology. 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
Croatia*	**8.2**	**66.8**	**16.4**	**8.4**

*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 Hendal 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 HR5010, Food and Agricultural Import Regulations and Standards Report for information on standards and regulations and HR5013, Export Certificate Report 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 quality checking are taken from every import shipment. If the border inspector (sanitary or veterinary) trusts the importer (on the basis of regular importing), then products are inspected only periodically. Product examinations have to be paid by the importer. If products are of suspicious quality, 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 ingredients and quality.

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 $267 million in 1993 to $883 million in 2004 and are still growing. Increasingly, imports are being distributed through large (multinational) 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 2004, Croatia's tourism industry recorded 6% more tourists and 2% more over night stays in comparison to the previous year. In 2004, 9.4 million tourists visited Croatia with a total of 47.8 million overnight stays.

Foreign tourists represent 83 to 89 percent of the total number of tourists. The majority of visitors come from Germany, Italy, Slovenia, Austria, Netherlands, 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 (groceries that are delivered only in Zagreb region), www.vivatipartneri.hr (wine sales, however the web business is more for promotional purposes than for sales), www.vinoteka.com (wine sales), www.puljanka.hr (groceries delivered in some parts of Istra), 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	2004 Imports	5-Yr. Avg. Annual Import Growth (2000-2001)	Import Tariff Rate 2005	Key Constraints of Market Development	Market Attractiveness for USA
Fish & Sea Food	47,164MT in 2001	$70 million (MT are n/a)	110.65% growth in dollar value	from 5% to 20%	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	$90 million (MT are n/a)	176.68% growth in value	See at: www.carina.hr	Strict biotech legislation and competition from E.U. and Croatian franchisees.	Growing market.
Pork	110,000MT in 2002/2003	$84 million (33,353MT)	156.14 % growth in dollar value (88.65% growth in quantity)	From 10+48.5€/ 100kg Max 23% to 10+64.6€/ 100kg Max 35%	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	$24 million (MT are n/a)	129.02% growth in dollar value	5%	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	189,000,000liters + 5.944MT in 2001	$ 15 million (13,487MT)	529% growth in dollar value (407% growth in quantity)	from 10% to 55% and 10+67.0€/ 100l to	New wine law doesn't require expensive testing for wines that come from	Consumption of quality wines is expected to grow with

				42.0 €/100l	countries with which Croatia has free trade agreements and TRQs for wine reciprocity.	standard of living.
Tree Nuts	N/a	$11 million (MT are n/a)	219% growth in dollar value	from 2% to 15%	no	Grading and quantity of domestic production is insufficient.
Rice	10,299 MT in 2003	$6 million (MT are n/a)	36.25% growth in dollar value	2%	Transshipments from Europe	Croatia has no domestic production.
Poultry Meat only MDM	N/a	$6.2 million (4,824MT) –all poultry	291.5% growth in dollar value (211.23% growth in quantity) – all poultry	All poultry: from 19% to 35% and 5+30€/100 kg Max 19.3% to 10+94.3€/ 100kg Max 35%	U.S. suppliers are being shut out of the MDM market due to E.U. –related phytosanitary restrictions.	Negligible domestic production of MDM.
Beef	55,000MT in 2001	$10.4 million (4,594 MT)	4% growth in dollar value (-19.4% drop in quantity)	From 25% to 35% and 8 + 40€/100kg Max 30% to 8 +102€/100 kg	Certificate of meat quality must contain statement that cattle wasn't fed with protein of animal origin.	Croatia has a shortage.

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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	2003	4.4/-2.9
Urban population (Millions) / Annual Growth rate (%)	2004	n.a.
Number of Major Metropolitan Areas	2004	-
Size of the Middle Class (Millions) / Growth Rate (%)	2004	n.a.
Per Capita Gross Domestic Product (US Dollars)	2004	$ 7,732
Unemployment Rate (%)	2004	13.8%*
Per capita Food Expenditures (US Dollars)	2003	$ 1,087.83
Percent of Female Population Employed	2003	36.5%
Exchange Rate (US$1 = X.X local currency)[5/]	2004	$1=Kn6.0355**

* ILO %
**dollar slide from $1=7.864 in 2002

TABLE B. IMPORTS OF AGRICULTURE, FISH & FORESTRY PRODUCTS

Croatia Imports
(In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S. Mkt. Share		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
BULK AGRICULTURAL TOTAL	121	141	136	6	7	9	5%	5%	7%
Wheat	1	1	12	0	0	1	0%	0%	4%
Coarse Grains	8	13	11	1	0	1	0.57%	0%	0.01%
Rice	5	6	6	1	1	1	2%	3%	2%
Soybeans	31	33	18	0	0	0	0%	0%	0%
Other Oilseeds	7	5	4	1	1	1	3%	6%	22%
Cotton	3	3	4	0	0	0	0%	0%	0%
Tobacco	22	21	22	5	6	7	24%	29%	31%
Rubber & Allied Gums	1	2	2	1	1	0	0.72%	0.30%	0%
Raw Coffee	19	20	24	0	0	1	0%	0%	0.34%
Cocoa Beans	9	12	10	0	0	0	0%	0%	0%
Tea (Incl. Herb Tea)	1	1	1	1	1	1	10%	6%	2%
Raw Beet & Cane Sugar	9	18	14	0	0	0	0%	0%	0%
Pulses	3	4	5	1	1	1	1%	1%	2%
Peanuts	2	2	2	1	1	1	0.34%	1%	47%
Other Bulk Commodities	1	1	1	0	0	1	0%	0%	2%
INTERMEDIATE AGRICULTURAL TOTAL	253	292	355	6	2	2	2%	0.59%	0.49%
Wheat Flour	1	1	1	0	0	0	0%	0%	0%
Soybean Meal	18	25	43	1	1	1	0.07%	0.05%	0.02%
Soybean Oil	5	5	7	0	0	0	0%	0%	0%
Vegetable Oils (Excl. Soybean Oil)	23	32	39	1	1	1	3%	0.18%	0.05%
Feeds & Fodders (Excl. Pet Foods)	22	27	27	1	1	1	0.67%	0.08%	0.09%
Live Animals	64	61	76	0	0	0	0%	0%	0%
Hides & Skins	24	21	23	3	1	0	12%	0.38%	0%
Animal Fats	2	2	3	0	0	0	0%	0%	0%
Planting Seeds	8	11	14	1	1	1	13%	5%	4%
Sugars, Sweeteners, & Beverage Bases	27	33	39	0	1	1	0%	0.02%	0.01%
Essential Oils	18	24	26	1	1	1	0.03%	0.09%	0.30%
Other Intermediate Products	41	51	56	1	1	1	3%	2%	2%
CONSUMER-ORIENTED AGRICULTURAL TOTAL	580	748	883	10	13	16	2%	2%	2%
Snack Foods (Excl. Nuts)	60	76	90	1	1	1	0.91%	0.21%	0.53%
Breakfast Cereals & Pancake Mix	5	8	11	1	1	1	0.27%	0.13%	0.06%
Red Meats, Fresh/Chilled/Frozen	47	55	88	0	0	0	0%	0%	0%
Red Meats, Prepared/Preserved	22	27	32	1	0	1	0.33%	0%	0.15%
Poultry Meat	3	3	6	0	0	0	0%	0%	0%
Dairy Products (Excl. Cheese)	36	37	46	1	0	0	0.06%	0%	0%
Cheese	25	36	45	0	0	0	0%	0%	0%
Eggs & Products	4	5	5	1	1	1	4%	0.02%	0.08%
Fresh Fruit	64	83	90	1	1	1	0.00%	0.00%	0.04%
Fresh Vegetables	21	45	45	1	1	1	0.02%	0.30%	0.12%
Processed Fruit & Vegetables	59	76	85	1	1	1	0.88%	0.56%	0.67%
Fruit & Vegetable Juices	11	14	15	1	1	1	0.07%	4%	7%
Tree Nuts	7	8	11	1	2	3	15%	20%	22%
Wine & Beer	21	31	36	1	1	1	0.15%	0.19%	0.13%
Nursery Products & Cut Flowers	18	24	29	1	1	1	0.04%	0.05%	0.30%
Pet Foods (Dog & Cat Food)	18	21	24	1	1	1	3%	3%	3%
Other Consumer-Oriented Products	162	200	223	7	9	10	5%	5%	5%
FOREST PRODUCTS (EXCL. PULP & PAPER)	153	212	243	1	1	1	0.63%	0.34%	0.26%
Logs & Chips	7	8	7	1	1	1	0.50%	0.05%	0.03%
Hardwood Lumber	9	16	19	1	1	1	2%	2%	0.66%

Softwood and Treated Lumber	33	44	47	1	1	1	0.24%	0.26%	0.02%
Panel Products (Incl. Plywood)	57	78	90	1	1	1	1%	0.23%	0.36%
Other Value-Added Wood Products	47	65	79	1	1	1	0.11%	0.04%	0.22%
FISH & SEAFOOD PRODUCTS	76	82	70	1	2	2	1%	2%	2%
Salmon	1	1	1	1	0	1	2%	0%	2%
Surimi	1	1	1	1	0	0	2%	0%	0%
Crustaceans	4	4	4	1	1	1	0.16%	0.46%	2%
Groundfish & Flatfish	8	8	10	1	0	1	0.23%	0%	0.08%
Molluscs	10	15	19	1	1	2	9%	6%	9%
Other Fishery Products	53	54	35	1	1	1	0.27%	1%	0.04%
AGRICULTURAL PRODUCTS TOTAL	955	1,181	1,373	22	21	27	2%	2%	2%
AGRICULTURAL, FISH & FORESTRY TOTAL	1,183	1,475	1,686	24	23	29	2%	2%	2%

Source: United Nations Statistics Division

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

Croatia – Top 15 Suppliers

CONSUMER-ORIENTED AGRICULTURAL, FISH & SEAFOOD PRODUCTS IMPORTS

$ 1,000	2001	2002	2003
China	4,018,405	4,501,716	4,875,948
Thailand	4,035,210	NA	3,824,584
Norway	3,278,735	3,442,442	3,478,217
Canada	2,789,451	3,066,798	3,257,236
United States	3,082,471	3,134,858	3,051,447
Denmark	2,015,635	2,104,072	2,298,600
Spain	1,856,682	1,937,177	2,258,749
Netherlands	1,407,609	1,449,173	1,739,882
Chile	1,629,933	1,542,973	1,676,510
Indonesia	1,537,891	1,491,336	1,548,547
United Kingdom	1,057,403	1,109,766	1,437,021
India	1,237,177	1,410,297	1,303,834
Iceland	1,096,318	1,185,706	1,261,842
France	1,177,983	1,050,920	1,249,812
Germany	859,659	881,117	1,016,475
Other	15,590,389	15,581,400	16,983,342
World	46,670,951	43,889,751	51,262,046

$ 1,000	2001	2002	2003
Netherlands	22,660,731	24,974,616	31,530,025
France	24,461,128	22,219,743	26,197,779
United States	23,075,892	23,000,013	23,568,624
Germany	16,115,466	17,631,691	21,993,842
Spain	12,641,576	13,995,308	17,549,157
Belgium	13,958,037	13,711,982	16,671,063
Italy	13,364,043	14,293,495	16,418,789
Denmark	7,869,429	8,117,948	9,385,521
Canada	8,411,306	8,746,482	9,136,597
China	6,669,404	7,325,537	8,047,496
Australia	7,147,633	7,628,930	7,905,985
New Zealand	6,981,700	6,329,446	7,230,267
United Kingdom	5,885,237	6,388,943	7,203,665
Brazil	5,164,636	5,463,535	6,857,203
Mexico	5,901,948	5,891,270	6,668,407
Other	55,397,748	55,471,288	67,043,146
World	235,705,914	241,190,227	283,407,566

Source: United Nations Statistics Division