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Croatia

Exporter Guide

Annual

2004

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Report Highlights:
Croatia imports a significant portion of its food consumption. The prospect of EU accession, the 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 almost tripled from $267 million in 1993 to $748 million in 2003. Croatian consumers are anti-biotech, and U.S. meat products may not be exported to Croatia at present.

Includes PSD Changes: No
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I Market Overview

Economic situation

Croatia faces economic challenges stemming from a history of communist mismanagement, damage from the war in the mid 1990's, and the government's struggle with tackling some difficult privatization and labor issues. Croatia became a EU candidate country in 2003, which will help the government to focus its economic reform efforts. 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 until 2004 had signed 37 bilateral trade agreements in an effort to liberalize trade.

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) emerged in 2002 and continued into 2004. GDP grew by 5.2 percent in 2002 and 4.3 percent in 2003. Croatia's external debt grew to $23.6 billion in 2003, a 53 percent increase over 2002 (some of this increase was related to depreciation of the dollar against the kuna) and 76 percent of GDP. (Country Commercial Guide, FCS)

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 19 years/22.93 percent; 20 to 64 years/60.68 percent; 65 and over/16.39 percent (2003 mid year estimate). The number of elderly and retired is rising, but they tend to have small pensions - the elderly are not the economic force they are in other countries.

Food Expenditures

Total consumption per household was Kn 64,736 ($8,232.2). In 2002, consumption per household for foods and beverages was 32.15 percent of total household consumption. Household consumption of foods and beverages in 2002 increased 10.45% comparing to 2000. Alcoholic beverages and tobacco in 2002 took 3.98 percent from total household consumption and consumption of these products is relatively stabile in last three years.

Size and Growth of the Consumer Foods Market

General

Distributive trade (total wholesale together with total retail trade) in 2002 including VAT was Kn 180.89 billion ($ 23 million), which is 17.89% raise from 2001. Retail trade only in food, beverages and tobacco in 2003 including VAT was Kn 24,385,905,000 ($ 3.6 million), which is 12.9% raise comparing with 2002, 22.2 % raise comparing with 2001 and 33.5 % raise comparing with 2000.

According to unofficial data last year, Croatia imported agricultural products and food valued at $1.23 billion and exported only $768 million. The Export-Import deficit in 2003 was $ 487 million, which is 10.36 percent more than in 2002. This deficit has a growing trend for the last few years. Imports of food also have upwards trend last few years thus they are expected to be even higher or at least at the same level as in 2003.

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

Beverages

Total beverage (including alcoholic drinks, tea, coffee) imports in 2003 were about $ 145.2 million, which is 33.27 percent more than in 2001.

In 2002 annual average consumption per household member was:

- coffee 3.24kg ,
- tea 0.26kg ,
- cocoa 0.34kg,
- mineral water 37.72l,
- soft drinks 13.50l,
- fruit juices 13.21l,
- syrups and concentrates 5.34kg or l
- spirits 0.80l
- wine 12.93l
- sparkling wine 0.04l
- beer 28.89l

Mineral water

According to the association of water and soft drink producers, mineral water consumption in first six mounts of 2003 was 148.5 million liters. From that number 115.2 million liters was from domestic production, which was 5 percent more than in the same period last year. In 2003 import of waters (Mineral and aerated waters not sweetened; ice, snow and portable water not sweeten; beverage waters, sweetened or flavored) was $ 25.6 million, which is 51 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 1/5 of total Croatian chocolate consumption in one year.

Food service (Restaurants)

According to the Croatian Statistical Institute, hotels and restaurants sales for foods, non-alcoholic and alcoholic drinks totaled $421,726 in 2002. Sales in this sector have been tending upwards (regardless on 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. Fish consumption in 2002, according to Croatian statistical institute, was 8.76 kilograms per capita. This means that seafood consumption in 2001 was about 7.5 kg. Total imports of fish and sea food in 2003 were $82 million, which is 8% increase compared with 2002. At the same time, U.S. market share increased from $1 million to $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 on 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 the Macedonia, Bosnia and Herzegovina, Turkey, Serbia & Montenegro, Albania, Moldova and 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 sea food	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, Lidl; and domestic supermarket chains like Konzum, Getro, KTC, CBA (group), CBA, and NTL. 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.

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.

In organics according to research conducted by the Hendal company and based on a random sample of 401 interviewees from all over Croatia:

- 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 HR4013, Food and Agricultural Import Regulations and Standards Report for information on standards and regulations.

General Import and Inspection Procedures

Incoming goods go to the custom storage at transport terminals or airports. After goods arrive to the custom storage, importer (in person) or fright forwarder should start procedures for checking and clearing goods, which includes special documents that should be sent to the Inspection Departments and the Custom. Procedure starts with Sanitary Inspection Department from 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 every time that import is conducted. If border inspector (sanitary or veterinary) trusts the importer (on basis of regular import) than products are inspected only periodically. Product examination has to be paid by importer. If products are of suspicious quality, their sales will be banned until analyses is conducted and proven otherwise. 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 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 for clarification, contact your Croatian partner or one of fright 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 seven years time, supermarkets have been introduced and 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 Raise 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 $748 million in 2003 and 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 or newsletters 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 - 8 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 by 5% in 2004 compared to the year before. The year 2003 recorded 7% more tourists and 4% more over night stays in comparison with the previous year. Thus, in the period under analysis, 8.9 million tourists visited Croatia, with a total of 46.6 million overnight stays. According to the Croatian National Bank's figures, international tourism revenues in 2003 amounted to USD 6.4 billion.

Foreign tourists represent 83-89 percent from total number of tourists. The majority of visitors come from Germany, Italy, Slovenia, 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 following: www.maxidiskont.hr (groceries that are delivered only in Zagreb region), www.vivatipartneri.hr (wine sales, but it is more for promotion purposes than for sales), www.vinoteka.com (wine sales), www.puljanka.hr (groceries delivered in some parts of Istra).

IV. Key Contacts and Further Information

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APPENDIX I

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries ($Mil) / US Market Share %	2003	1,181 / 2%
Consumer Food Imports From All Countries ($Mil.) / US Market Share %	2003	748 / 2%
Edible Fishery imports From All Countries ($Mil) / US Market Share %	2003	82 / 2%
Total Population (Millions) / Annual Growth Rate per 1000 Inhabitants	2003	4.4/-2.9
Urban population (Millions) / Annual Growth rate (%)		n.a.
Number of Major Metropolitan Areas	2003	-
Size of the Middle Class (Millions) / Growth Rate (%)		n.a.
Per Capita Gross Domestic Product (US Dollars)	2003	$ 6,484[1]
Unemployment Rate (%)	2003 (VII-XII)	18.2%* 14.4%**
Per capita Food Expenditures (US Dollars)	2002	$ 905.55
Percent of Female Population UNEmployed	2003 (VII-XII)	15.7%**
Exchange Rate (US$1 = X.X local currency)[5/]	2003	$1=Kn6.7014

* Local methodology

** ILO %

1 – temporary information for 2003

5/ dollar slide from $1=7.864

Reporting Country: Croatia Top 15 Ranking	Import		
	2001	2002	2003
	1000$	1000$	1000$
Spain	18,943	12,480	19,108
France	148	241	9,887
Netherlands	1,187	3,692	9,448
Denmark	5,626	8,387	7,829
Italy	6,095	8,203	6,345
Sweden	3,094	3,855	3,013
Norway	2,684	3,980	2,986
Thailand	1,752	2,644	2,899
Argentina	2,078	3,438	2,849
Falkland Islands (Islas Malvinas)	140	208	2,787
Ireland	440	2,983	1,809
United States	2,273	1,047	1,534
Iceland	1,174	1,180	1,455
Slovenia	1,164	1,031	1,395
United Kingdom	173	553	1,206
Other	9,603	21,969	7,362
World	56,571	75,897	81,926

Reporting Country: Croatia Top 15 Ranking	Import		
	2001	2002	2003
	1000$	1000$	1000$
Italy	76,027	88,657	115,276
Germany	54,662	71,246	91,587
Slovenia	61,812	58,391	74,323
Austria	55,757	57,387	72,589
Netherlands	30,293	41,561	52,929
Hungary	54,332	52,565	50,959
Poland	14,686	23,292	29,295
Spain	14,128	17,548	26,777
Bosnia-Hercegovina	10,345	16,158	23,196
Denmark	8,370	11,311	19,487
Czech Republic	9,786	10,746	16,862
Ecuador	12,968	13,336	15,606
France	10,634	10,006	12,918
United States	7,581	10,267	12,897
Serbia & Montenegro	13,480	13,505	11,459
Other	63,577	84,307	122,148
World	498,498	580,355	748,357

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	2003 Imports	5-Yr. Avg. Annual Import Growth (1999-2003)	Import Tariff Rate 2004	Key Constraints Over Market Development	Market Attractiveness for USA
Fish & Sea Food	47,164MT in 2001	$82 million (57,076MT)	186% growth in dollar value (288% growth in quantity)	from 5% to 21%	Competition from some E.U. seafood exporting countries.	Demand and consumption should continue to grow along with tourism for the next several years.
Snack Food	N/a	$76 million (MT are n/a)	110.55% 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	$58 million (27,902MT)	143.12 % growth in dollar value (110.45% growth in quantity)	From 8+36.2€/100kg Max 32.5% to 10+64.6€/100kg Max 35%	No negotiated USDA/FSIS certificates (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	$21 million (20,626MT)	98.24% growth in dollar value (98.4% growth in quantity)	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	$ 10.5 million (9,171MT)	323.6% growth in dollar value (71.58% growth in quantity)	from 10% to 58% or 10+73.6€/100l to 46.7/100l	New wine law doesn't require expensive testing for wines that come from countries with which Croatia has free trade agreements and TRQs for wine reciprocity.	Consumption of quality wines is expected to grow with standard of living.
Tree Nuts	N/a	$7.8 million (MT are n/a)	73.5% growth in dollar value	from 2% to 15%	no	Grading and quantity of domestic production is insufficient.
Rice	10,299 MT in 2003	$5.7 million (10,802MT)	24.1% growth in dollar value (16.94% growth in quantity)	2%	Transshipments from Europe	Croatia has no domestic production.
Poultry Meat only MDM	N/a	$1.4 million (2,058MT) -only mdm	-27.02% drop in dollar value (91.08% growth in quantity) -only mdm	All poultry: from 19.5% to 35% or 5+30€/100 kg Max 20% to 10+57€/100kg Max 41.6%	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	$3.8 million (1,670 MT)	-65.28% drop in dollar value (-75.74% drop in quantity) due to BSE import restrictions	From 25% to 30% or 8 + 40€/100kg Max 30% to 8.4 +109€/100 kg	Certificate of meat quality must contain statement that cattle wasn't fed with protein of animal origin.	Croatia has a shortage

Croatia Imports of Agriculture, Fish & Forestry Products
(In Millions of Dollars)

	Imports from the Word			Imports from the U.S.			U.S Market Share		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
BULK AGRICULTURAL TOTAL	124	121	141	3	6	7	3%	5%	5%
Wheat	1	1	1	0	0	0	0%	0%	0%
Coarse Grains	31	8	13	1	1	0	0.11%	0.57%	0%
Rice	5	5	6	1	1	1	2%	2%	3%
Soybeans	18	31	33	1	0	0	0.02%	0%	0%
Other Oilseeds	2	7	5	1	1	1	6%	3%	6%
Cotton	5	3	3	0	0	0	0%	0%	0%
Tobacco	19	22	21	3	5	6	16%	24%	29%
Rubber & Allied Gums	1	1	2	1	1	1	0.97%	0.72%	0.30%
Raw Coffee	22	19	20	1	0	0	0.36%	0%	0%
Cocoa Beans	5	9	12	0	0	0	0%	0%	0%
Tea (Incl. Herb Tea)	1	1	1	1	1	1	5%	10%	6%
Raw Beet & Cane Sugar	10	9	18	0	0	0	0%	0%	0%
Pulses	3	3	4	1	1	1	1%	1%	1%
Peanuts	1	2	2	0	1	1	0%	0.34%	1%
Other Bulk Commodities	1	1	1	1	0	0	1%	0%	0%
INTERMEDIATE AGRICULTURAL TOTAL	189	253	292	2	6	2	1%	2%	0.59%
Wheat Flour	1	1	1	0	0	0	0%	0%	0%
Soybean Meal	24	18	25	1	1	1	0.04%	0.07%	0.05%
Soybean Oil	1	5	5	0	0	0	0%	0%	0%
Vegetable Oils (Excl. Soybean Oil)	16	23	32	1	1	1	0.44%	3%	0.18%
Feeds & Fodders (Excl. Pet Foods)	16	22	27	1	1	1	0.58%	0.67%	0.08%
Live Animals	32	64	61	1	0	0	0.00%	0%	0%
Hides & Skins	13	24	21	1	3	1	3%	12%	0.38%
Animal Fats	2	2	2	1	0	0	3%	0%	0%
Planting Seeds	8	8	11	1	1	1	5%	13%	5%
Sugars, Sweeteners, & Beverage Bases	23	27	33	1	0	1	0.03%	0%	0.02%
Essential Oils	18	18	24	1	1	1	0.04%	0.03%	0.09%
Other Intermediate Products	36	41	51	1	1	1	3%	3%	2%
CONSUMER-ORIENTED AG TOTAL	498	580	748	8	10	13	2%	2%	2%
Snack Foods (Excl. Nuts)	44	60	76	1	1	1	0.28%	0.91%	0.21%
Breakfast Cereals & Pancake Mix	5	5	8	0	1	1	0%	0.27%	0.13%
Red Meats, Fresh/Chilled/Frozen	41	47	55	1	0	0	2%	0%	0%
Red Meats, Prepared/Preserved	20	22	27	1	1	0	0.60%	0.33%	0%
Poultry Meat	4	3	3	1	0	0	7%	0%	0%
Dairy Products (Excl. Cheese)	44	36	37	0	1	0	0%	0.06%	0%
Cheese	19	25	36	0	0	0	0%	0%	0%
Eggs & Products	3	4	5	1	1	1	2%	4%	0.02%
Fresh Fruit	56	64	83	1	1	1	0.00%	0.00%	0.00%
Fresh Vegetables	23	21	45	1	1	1	0.12%	0.02%	0.30%
Processed Fruit & Vegetables	50	59	76	1	1	1	0.85%	0.88%	0.56%
Fruit & Vegetable Juices	11	11	14	1	1	1	0.39%	0.07%	4%
Tree Nuts	5	7	8	1	1	2	11%	15%	20%
Wine & Beer	16	21	31	1	1	1	1%	0.15%	0.19%
Nursery Products & Cut Flowers	16	18	24	0	1	1	0%	0.04%	0.05%
Pet Foods (Dog & Cat Food)	13	18	21	1	1	1	9%	3%	3%
Other Consumer-Oriented Products	130	162	200	4	7	9	3%	5%	5%
FOREST PRODUCTS (EXCL. PULP & PAPER)	121	153	212	1	1	1	0.37%	0.63%	0.34%
Logs & Chips	5	7	8	0	1	1	0%	0.50%	0.05%
Hardwood Lumber	7	9	16	1	1	1	0.03%	2%	2%
Softwood and Treated Lumber	29	33	44	1	1	1	0.05%	0.24%	0.26%
Panel Products (Incl. Plywood)	48	57	78	1	1	1	0.83%	1%	0.23%
Other Value-Added Wood Products	32	47	65	1	1	1	0.10%	0.11%	0.04%
FISH & SEAFOOD PRODUCTS	57	76	82	2	1	2	4%	1%	2%
Salmon	1	1	1	1	1	0	2%	2%	0%
Surimi	1	1	1	1	1	0	2%	2%	0%
Crustaceans	3	4	4	0	1	1	0%	0.16%	0.46%
Groundfish & Flatfish	8	8	8	1	1	0	0.28%	0.23%	0%
Molluscs	9	10	15	1	1	1	14%	9%	6%
Other Fishery Products	36	53	54	1	1	1	3%	0.27%	1%
AGRICULTURAL PRODUCTS TOTAL	812	955	1,181	13	22	21	2%	2%	2%
AGRICULTURAL, FISH & FORESTRY TOTAL	989	1,183	1,475	16	24	23	2%	2%	2%