Required Report - public distribution

Date: 10/22/2010

GAIN Report Number: 1013

Croatia

Exporter Guide

Annual Report 2010

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Report Highlights:
Croatia imports a significant portion of the food it consumes. Slow but continued economic reforms as a result of the EU accession process and growing tourism make Croatia a significant, long-term importer of certain U.S. food products, including seafood, snack foods, pet food, wine, tree nuts, rice, etc... Nevertheless, Croatia has not been immune to the global economic crisis and at this time still faces significant challenges with no real signs of improvement. Croatian consumers are strongly anti-biotech.

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I Market Overview

Economic Situation

On October 3, 2005, Croatia began negotiations for accession into the European Union (EU) and since then the government has made significant progress in its agenda to finalize negotiations. Today EU regulations are viewed as the norm. The country is being prepared for full EU membership, which is also true for the agricultural and processed food sectors. In addition, Croatia is a NATO member, which provides a security framework for its improving economic and social prospects. Croatia is also a member of the WTO and has trade agreements with EU-27, EFTA, Turkey, and CEFTA 2006.

Croatia has progressed considerably in creating a market economy and establishing macroeconomic stability. With the Kuna closely tied to the Euro, Croatia enjoys a stable currency. Unemployment appears to have peaked in 2000/2001 and positive trends (more employment in private sector firms) began in 2002 and continued until 2008. However, Croatia has not been immune to the global economic crisis thus employment statistics for 2009 and 2010 show downward trends and Croatia still faces significant challenges. In 2009, GDP dropped 5.8 percent and in 2010 there are no signs of improvement. Croatia's external trade imbalances and high foreign debt present risks because continued access to foreign credit may be limited.

Demographic Developments and Their Impact on Consumer Buying Habits

Croatia's population is about 4.4 million and is slowly decreasing. The age distribution, based on 2008 estimates, is as follows: 0 to 14 years/15.4 percent; 15 to 64 years/67.3 percent; 65 and over/17.3%. Purchasing power of average Croatian citizen in one year is about Euro 4,800, which is about 40% of the EU average ("Gfk" market research agency - Purchasing power is a measure of per capita disposable income (including any received state benefits) after the deduction of taxes. The study indicates per person per year purchasing power levels in Euros. GfK purchasing power figures have not been adjusted for inflation. The study draws on statistics on income and tax levels, government benefits and forecasts by economic institutes. The GfK purchasing power study does not take into account regional cost-of-living variations or recurring monthly deductions from disposable income such as rent, mortgage payments and contributions to private retirement funds and insurance policies.).

The number of elderly and retired persons is rising, but they tend to have small pensions and are not the economic force they are in some countries.

Food Expenditures

In 2008, total consumption of goods per household was $15,103 (Kn 74,524). Of that total consumption, 32.0% was total food and beverage consumption per household. In addition, alcoholic beverages and tobacco amounted to 3.5% out of total household consumption.

Size and Growth of the Consumer Foods Market

General

In 2008, trade (including total wholesale and total retail sales and VAT) amounted to Kn 302.37 billion ($ 61.28 billion), which was about a 5.66% increase compared to 2007.

In 2009, Croatia imported agricultural products (HS 1 – 24, 41,44,52) valued at $2.624 billion and exported $1.861 billion worth of these goods, which puts the agricultural trade deficit at $0.76 billion. In the last few years, Croatia's food imports grew as did the country's trade deficit. However in 2009 imports of these goods dropped by 17.16 %, exports dropped by 8.78% and trade deficit decreased slightly due to the global economic downturn and slowing of trade.

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

Consumer foods

Croatia's total imports of consumer foods have steadily grown during last years. Even with a 9.82% drop in 2009 compared with 2008, consumer foods imports in 2009 reached more than $1.401 billion. In the last few years, a flourishing tourism along the Dalmatian coast and rebounding consumer demand in urban areas are fueling demand for consumer foods, which is underlined by the increasing number of supermarkets. Trade statistics on U.S. exports of consumer foods to Croatia are severely understated due to transshipment via the EU. Demand for medium to high quality consumer foods will continue to rise and should be a boon for U.S. companies, provided they can overcome less than competitive high ocean freight rates into the Adriatic Sea from U.S. ports. Nevertheless, U.S. companies can take advantage of the weak dollar.

Beverages

Fruit and vegetable juice imports in 2009 were $18.38 million, down about 31.29% compared to 2008 due to global economic crisis and slowing of trade.

In 2008, annual average consumption per household member was:

Coffee 3.51 kg,
Tea 0.30 kg,
Cocoa 0.32 kg,
Mineral water 28.49 kg,
Soft drinks 11.43 kg,
Fruit juices 15.93 kg,
Syrups for preparation of beverages 3.77 l,
Spirits 0.69 l,
Wine 8.92 l,
Sparkling wine 0.06 l,

Beer 17.00 l,

Food service (restaurants)

According to the Croatian Statistical Institute, hotels and restaurants sales for foods, non-alcoholic, and alcoholic drinks totaled Kn 4.950 billion ($1.003 million) in 2008. Sales in this sector have been trending upwards (despite the changes in the value of the dollar) from 2000 to present.

Seafood

Although Croatia is a net-exporter of fish and seafood with bred tuna being the most important export item, Croatia imports a significant quantity of fish and seafood as well. In 2008 Croatia's seafood imports declined from $138 million to $102 million in 2009 due to the global financial crisis, but Croatia is expected to import over $100 million in fish and seafood annually for the foreseeable future. Promising areas for U.S. exporters include fish feed for tuna production, fish for the local fish processing industry, sardines, and mackerel.

In 2008 the annual average consumption of fish (fresh and salt water) and seafood per household member was 8.38 kg. The demand for fresh-water fish and seafood is expected to increase with modern changes in nutritional habits and increased demand from tourism. The small blue fish is the most consumed fish on the national market, but due to changing nutritional habits and consumer demand, salted fish production has significantly increased, including anchovies, frozen fish, smoked fish (smoked sea bass, eel, and freshwater fish), fish pâté, marinated fish, and others.

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 growth	Reservations towards products with chemical food additives
Certain fruits, vegetables, dried fruits and rice are not produced domestically	U.S. food products are at a tariff disadvantage compared to goods from the countries with which Croatia has bilateral agreements (EU-27, EFTA, Turkey and CEFTA 2006)
Shortages of some agricultural products like beef, pork, soybean meal, and certain types of seafood	High shipping costs
Most importers speak English	Lack of awareness of U.S. goods; no concept of U.S. quality by consumers
	The government adopting restrictive EU Phytosanitary regulations

II. Exporter Business Tips

Local Business Customs

Food retailers buy domestic and imported products from wholesalers. The wholesale sector is completely privatized. Restructuring of the retail segment also occurred as retail chains were privatized during 1990s and acquired by larger groups and new private retailers emerged on the market. The retail sector is dominated by foreign supermarket chains such as Billa, Kaufland, DM, Ipercoop, Lidl, Mercator, Metro, and Interspar; and domestic supermarket chains consist of chains such as Konzum, Plodine, NTL (Diona, Kerum,…), Getro, etc…. Large supermarket chains have their own purchasing sections that buy, store, and distribute foodstuffs centrally. These purchasing units also import products. In addition, they also purchase some items through specialty wholesale importers. Moreover, some chains cooperate in purchase logistics with other chains to get better purchase price from their suppliers.

General Consumer Tastes and Preferences

"Gfk", market research agency carried out a survey in October, 2009 in Croatia on "(non)recognition of healthy food" and among other things researched opinion, potential purchase, recognition of GMO food, organic food, functional food and compared results with the similar surveys they conducted in 2005 and 2008. Following are some of their findings:

GMO food – Croatians are becoming less skeptical towards GMO food. The percentage of citizens that refuse to buy GMO products decreased from 67% in 2005 to 51% in 2009. However, in 2009 study, only 6% of citizens would unconditionally buy GMO products, which is a decrease from 8% in 2005. Percentage of citizens that do not care about GMOs raised from 9% in 2005 to 14% in 2009. In addition, in 2009 study, 29% of respondents thought that they didn't know enough about GM foodstuffs, while in 2005 only 16% thought that. The study also showed that 90% of respondents think that GMO foodstuff must be clearly labeled on the store shelf.

Functional food - Research from 2009 showed that 57% of respondents have heard of functional foodstuff like omega-3 margarine and LGG yogurt, which is about the same like in the last year's "Gfk" survey.

Organic food – There are 83% of Croatians that have heard of organic products. About half of the respondents said that they are able to distinguish organics in shops. In 72% of cases respondents said that they recognize organics by recognizing logo of "Croatian Eco Product" or by seeing label with statement "healthy product". Only 4% of respondents buy organics regularly, 5% buy organics often, 24% buy organics from time to time, 23% rarely buy organics and 43% do not buy organics. Compared with a similar research from last year it can be seen that percentage of buyers of organics decreased, which can be attributed to 2009 economic downturn. However in the long term it is expected that this market segment will grow when economic situation becomes better in Croatia.

Another, interesting research that "Gfk" agency did in Croatia, in March, 2010 was on the topic of "how do we eat". The following are research results:

For food preparation Croatians use sunflower oil (84%), olive oil (51%), lard (41%), butter (31%)

and margarine (26%). Most of the respondents (90%) eat all types of meat. White bread is everyday food for 50% of respondents, dark bread is consumed by 30% of respondents and integral bread is consumed by 19% of respondents. More than half of the respondents consume cakes and sweet cookies daily and weekly. Chocolate is also consumed by 60% of respondents daily and weekly. Coffee is consumed daily by 80% of respondents, 54% consume milk daily, 33% consume plain yogurt daily and cheese is daily consumed by 30% of respondents. Croatians prefer good quality and good taste of food (each about 95%). Immediately after quality and taste Croatians prefer low prices, domestic origin, no artificial coloring, no artificial flavorings - (each about 65%). Then follow no preservatives and no low fat products - (each about 56%). Half of the respondents stated the importance of the known producer and organic origin. Two least important characteristic are foreign producer (11%) and attractive packaging (24%). Some changes are noticed in the consumer habits thus it is eaten more fruits and vegetables, less fatty food, less "fast food", more fluids, etc…

In addition, it is noticeable that in this time of economic downturn Croatians more and more purchase supermarkets' private label products.

Food Standards and Regulations

See FAIRS Country Report 2010 for information on standards and regulations and Export Certificate Report 2010 for information on export certificates.

General Import and Inspection Procedures

Incoming goods must go through customs storage at transport terminals or airports. After the goods arrive at the customs storage, the importer or freight forwarder should start procedures for checking and clearing goods, which includes special documents that should be sent to the Inspection Departments and the Customs Office. The procedure starts at the Sanitary Inspection Department of the Ministry of Health and Social Welfare, which checks all products (except meat, which is checked by Veterinary Inspection Department from the Ministry of Agriculture, Fishery and Rural Development). From time to time samples are taken for food safety testing. In addition, products are inspected for quality. Products that can be made from biotech products are also sampled and sent to the laboratory for testing (see Agricultural Biotechnology Report 2010). The importer must pay for product inspections. If products are of suspicious quality and/or health standards their sales will be banned until analyses is conducted. Customs clearance and removal from storage is carried out under the supervision of a customs officer who compares the documents with the commodities after they were checked by sanitary or veterinary inspector for quality, ingredients and health standards.

Customs rates can be found at:

http://www.carina.hr (This web site is only in Croatian. For clarification, contact your Croatian partner or one of freight forwarding companies to determine the proper rates.)

Customs import documents should be in Croatian or bilingual English/Croatian.

Average length of customs clearance for food products, if all documents are in order, is one day.

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 the past eight years, supermarkets have developed rapidly in Croatia, leaving the traditional retail system for food far behind. In 2009, the share of 10 leading supermarkets in overall food retailing reached 70 percent according to a study conducted by market research agency "Gfk". Thus, currently most consumers shop at supermarkets and imports are being increasingly distributed through large supermarkets. Croatia's total imports of consumer foods in 2009 were $1.401 billion.

Promotion and Marketing Strategies

A media campaign is considered necessary for the success of any new food product. In that respect, advertising is a very important marketing tool in Croatia. Businesses use all available media like internet, radio, billboards, newspapers, magazines and TV, although television is the food industry's favorite media. Supermarkets also use direct marketing by mostly mailing flyers. Consumer participation contests on TV and radio are also very common.

Tourism Sales

Tourism, although highly seasonal, is an important economic activity in Croatia. Each year about 9 million foreign tourists visit Croatia (compared to Croatia's population of 4 million). The majority of visitors come from Germany, Italy, Slovenia, Austria, Czech Republic, Poland, France, Netherlands, Hungary, Slovakia, UK and Bosnia and Herzegovina. Tourists from countries outside of Europe are mostly from America and recently from Japan. Tourist infrastructure is satisfactory but still developing, particularly in the main tourist destinations.

Internet Sales

Internet shopping in Croatia is still negligible. Most of the Internet shopping in Croatia involves travel services, IT equipment, books, and electrical appliances. Despite this, there are a few companies providing online sales of retail food products.

While the retail online transactions in Croatia still represent small percent of total retail trade in the country, e-commerce in Croatia is considered to be a common occurrence.

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	2009 Imports	5-Yr. Avg. Annual Import Growth (2004-2009)	Import Tariff Rate 2010	Key Constraints of Market Development	Market Attractiveness for USA
Fish & Sea Food (products)	n/a	$102million (44,378 MT)	Growth in $ value : 2004/05 - 37.1% 2005/06 – 8.1% 2006/07 – 13.6% 2007/08 – 16.3% 2008/09 - (-26.18)	See at: www.carina.hr	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	$153million (40,303 MT)	Growth in $ value : 2004/05 - 7.5% 2005/06 – 15.7% 2006/07 – 21.7% 2007/08 – 20.6% 2008/09 -(- 7.31%)	See at: www.carina.hr	Strict biotech legislation and competition from E.U. and Croatian franchisees.	Growing market.
Pork	n/a	$143million (46,024 MT)	Growth in $ value : 2004/05 - 33.0% 2005/06 – (-1.58%) 2006/07 – 3.6%	See at: www.carina.hr	Only companies that are registered exporters of pork for the EU market can access Croatian market. Competition from EU companies because of geographical	Croatian meat processors are importing significant quantities of pork because of volatile situation on the market due to cyclic pig production dependent on the price of feed. In addition, sometimes there is a market shortage of products of certain quality standards.

			2007/08 – 19.32% 2008/09 - 6.94%		closeness.	
Pet Food (Dog & Cat Food-retail)	n/a	$47.65million (36,310 MT)	Growth in $ value : 2004/05 - 18.6% 2005/06 – 13.2% 2006/07 – 18.4% 2007/08 – 25% 2008/09 -(- 1.09%)	See at: www.carina.hr	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	n/a	$23million (13,662,728 Liters)	Growth in $ value : 2004/05 - 4.0% 2005/06 – 21.6% 2006/2007 – 40.8% 2007/08 – 1.23% 2008/09 -(-18.55%)	See at: www.carina.hr	High transportation cost.	Consumption of quality wines is expected to grow with standard of living.
Tree Nuts	n/a	$15.49million (3,059 MT)	Growth in $ value : 2004/05 - 26.7% 2005/06 – (-20.0%) 2006/07 – 30.3% 2007/08 –	See at: www.carina.hr	Quality standards must meet EU standards.	Croatia does not produce sufficient quantities. In addition grading and quantity of domestic production is insufficient.

			10.3% 2008/09 -(-7.09%)			
Rice	n/a	$11.88million (11,569 MT)	Growth in $ value : 2004/05 - 10.7% 2005/06 – 10.1% 2006/07 – 12.3% 2007/08 – 39.7% 2008/09 - (-1.00%)	See at: www.carina.hr	Transshipments from Europe.	Croatia has no domestic production.
Beef	n/a	$42.09million (12,179 MT)	Growth in $ value : 2004/05 – 124.5% 2005/06 – (-50.2%) 2006/07 – 45.8% 2007/08 – 91.2% 2008/09 - 29.71%	See at: www.carina.hr	Croatian legislation transposes EU legislation	Croatia has a shortage.

V. Key Contacts and Further Information

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APPENDIX I - STATISTICS

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Ag Imports From All Countries* ($Mil)/US Share %**	2009	2,120 / 1.24 %*
Consumer Food Imports From All Countries ($Mil.) / US Share %	2009	1,401 / 1.43%*
Edible Fish Imports From All Countries ($Mil) / US Share %	2009	102 / 1.77%*
Total Population (Millions) / Annual Growth Rate per 1000	2008	4,435(4,429 evaluation in 2009)/-1.9

Urban population (Millions) / Annual Growth rate (%)	2009	n.a.
Number of Major Metropolitan Areas	2009	-
Size of the Middle Class (Millions) / Growth Rate (%)	2009	n.a.
Per Capita Gross Domestic Product (US Dollars)	2009	$ 14,222
Unemployment Rate ILO (%)	2009	9.7 %
Per capita Food Expenditures (US Dollars)	2008	$ 1,653
Percent of Female Population Employed	2009	37.8%**
Exchange Rate (US$1 = X.X local currency)	2009	$1=Kn 5.2804

* Source: Global Trade Atlas

** Croatian Bureau of Statistics, Labor Force Survey, 3rd quarter 2009

*** BICO grouping

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 Market Share		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
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%
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%

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 & EDIBLE FISHERY PRODUCTS

CONSUMER-ORIENTED AGRICULTURAL IMPORTS

Croatia – Top 15 Suppliers	Import		
	2007	2008	2009
	$1,000	$1,000	$1,000
Germany	172,175	226,585	218,305
Italy	190,648	224,766	198,955
Netherlands	94,166	117,926	112,795
Austria	98,442	103,182	84,913
Bosnia & Herzegovina	59,580	79,764	83,836
Hungary	64,297	77,953	71,207
Poland	66,887	77,042	69,641
Slovenia	80,603	84,178	60,950
Spain	53,605	56,182	59,362
Macedonia	33,932	38,961	38,178
Serbia	27,442	33,498	35,659
Ecuador	26,128	36,972	34,518
Brazil	36,286	36,399	29,370
Denmark	27,876	32,233	29,314
France	27,634	31,256	26,817
18. United States	18,052	22,269	19,978
Other	227,110	274,478	227,320
World	1,304,863	1,553,644	1,401,118

Source: Global Trade Atlas

FISH & SEAFOOD PRODUCTS IMPORTS

Croatia – Top 15 Suppliers	Import		
	2007	2008	2009
	$1,000	$1,000	$1,000
Spain	27,472	18,312	16,354
Sweden	6,672	11,556	12,542
Italy	10,575	11,212	8,072
Falkland Islands	8,608	9,749	6,421
Norway	6,911	6,695	5,472
Thailand	5,738	7,733	5,211
France	3,259	6,930	3,846
Argentina	3,062	7,082	3,816
United Kingdom	3,627	4,411	3,165
Bosnia & Herzegovina	1,128	3,997	2,939
Slovenia	2,154	2,910	2,893
Vietnam	1,539	2,580	2,602
Iceland	2,998	2,587	2,355
China	2,325	3,301	2,272
New Zealand	2,283	2,190	2,265
17. United States	4,848	4,136	1,812
Other	25,812	33,071	20,172
World	119,011	138,452	102,209

Source: Global Trade Atlas