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Croatia

Exporter Guide

Annual Report

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Report Highlights:
Croatia imports a significant portion of the food it consumes. Croatia has not been immune to the global economic crisis and still faces significant challenges. However, continuing economic reforms as a result of EU accession and growing tourism make Croatia a potential market for certain US food products, such as seafood, snack foods, pet food, wine, tree nuts, and rice. This report's statistical data were updated in October 2015.

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I. Market Overview

Economic Situation and Consumer Buying Habits

On July 1, 2013, Croatia became the 28th European Union (EU) Member State. In addition, Croatia is a member of the World Trade Organization and a NATO member, which provides a security framework for its improving economic and social prospects.

Croatia has progressed considerably in creating a market economy and establishing macroeconomic stability. With the Kuna (HRK) closely tied to the Euro, Croatia enjoys a stable currency. However, Croatia has not been immune to the global economic crisis. Thus, unemployment has been high for the past five years with 2014 registering an unemployment rate of 17.3 percent. Moreover, GDP has declined for six years in a row (2009-2014). In 2014, the real GDP growth rate was -0.4 percent. Croatia's external trade imbalances and high foreign debt present risks to continued access to foreign credit. A mildly encouraging sign is that real growth turned positive in the first half of 2015 and 2015 real GDP is expected to rise above zero. In 2016, Croatian GDP is expected to grow further, which should send a positive message and stimulate frugal consumers to start spending. Long-term growth prospects for the Croatian economy remain strong, although the country continues to face significant pressure because of the global financial crisis. As Croatia fully integrates into the EU, business opportunities will grow for U.S. companies.

Although Croatian made progress in economic and administrative reforms, problems remain in this developing economy. Judiciary is burdened with case backlogs, there is a lack of expertise in commercial affairs, bureaucracy is overly complex and sometimes non-transparent and there are real and perceived issues of corruption. Thus, the business climate in Croatia is considered difficult, which requires caution and patience for success. Croatia is a mature market with well-established competition mainly from the European Union. The Croatian consumer is discriminating and will consider many factors beyond brand loyalty in purchasing decisions, although when it comes to food Croatia is mostly a price market.

Demographic Developments and Consumer Buying Habits

Croatia's population is approximately 4.2 million and is slowly decreasing. The age distribution, based on 2014 estimate, is as follows: 1 to 14 years/14.7 percent; 15 to 64 years/66.7 percent; 65 and over/18.6 percent. The purchasing power of an average Croatian citizen is approximately €5,231 according to a 2014/15 Gesellschaft für Konsumforschung (Society for Consumer Research, Gfk) - Gfk Purchasing Power Europe Study[1]. 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.

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[1] Gesellschaft für Konsumforschung (Gfk): Gfk Purchasing Power Europe Study, 2014/2015, Purchasing Power Europe Study 2014/2015 : GfK Purchasing Power" refers to the amount of funds an individual has at his or her disposal for a particular period of time. That is, GfK Purchasing Power is the sum of the net incomes of a particular region. GfK's purchasing power figures are based on the most up-to-date data available at the time of analysis on net household income levels and the consumer spending of private households. These figures take into account fluctuations in the gross domestic product, the net national income level and current inhabitant and household numbers. Additional factors taken into consideration include anticipated changes in the gross domestic product, consumer expenditures and projected economic and market developments.

High unemployment among youth makes them another demographic segment with very low purchase power.

Size and Growth of the Consumer Foods and Edible Fishery Products

In 2014, Croatia imported agricultural, fish and forestry products valued at $3.30 billion and exported $2.64 billion worth of these goods, which puts the agricultural trade deficit at approximately $668 million.

Croatia's total imports of consumer foods have steadily grown over the last few years and approached $2.0 billion in 2014. Flourishing tourism along the Dalmatian coast and rebounding consumer demand in urban areas have fueled demand for consumer foods, as evidenced by the growing number of supermarket stores. However, there is little specific data on domestic sales of food products by class or type. Trade statistics on US exports of consumer foods to Croatia are severely understated due to transshipment via other EU member states. Demand for medium to high quality consumer foods will continue to rise and should be a boon for US companies, provided they can overcome high ocean freight rates into the Adriatic Sea from US ports.

Croatia is a net-exporter of fish and seafood, with farmed tuna being the most important export item, although Croatia imports a significant quantity of these products as well. The economic downturn has affected seafood imports, but Croatia's imports of these products still reached $115 million in 2014. Furthermore, Croatia is expected to continue to import over $100 million in fish and seafood annually for the foreseeable future. Promising areas for US exporters include fish feed for tuna production and fish for the local fish processing industry such as sardines and mackerel.

Annual average consumption of fish (fresh and salt water) and seafood per household member is 8.20 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 increased significantly, as well as frozen fish, smoked fish (smoked sea bass, eel, and freshwater fish), fish pâté, marinated fish, and other such products.

Advantages and Challenges of US Suppliers in the Croatian Market

Advantages	Challenges

Growth in tourism	High shipping costs and Croatian buyers demand quality but also low prices
Urban population growth	Retailers rarely import US products directly into Croatia, they prefer purchases from central distributors/ mainly located in other member states (mainly Germany)
Certain fruits, vegetables, dried fruits and rice are not produced domestically	The government adopted restrictive EU Phytosanitary regulations
Good reputation of certain US products like dried fruits and nuts	Reservations towards products with chemical food additives
US style food is popular among the younger generation	Negative attitude towards foods containing or made from biotech products
Shortages of some agricultural products like beef, pork, soybean meal, and certain types of seafood	Competition from EU member states
Most importers speak English	Lack of awareness of US goods; no consumer understanding of US quality
EU membership may make it possible to source US products from another member state hub more competitively than before	High promotion costs to increase consumer awareness

II. Exporter Business Tips

Local Business Customs

Except for the largest retailers, food retailers generally buy domestic and imported products from wholesalers. The wholesale sector is completely privatized. Restructuring of the retail segment occurred in the 1990s, when 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 such as Billa, Kaufland, DM, Lidl, Metro, and Interspar and domestic supermarket chains such as Konzum and Plodine. The largest 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.

General Consumer Tastes and Preferences

Croatians have conservative tastes which are reflected in the local cuisine and in local production methods and marketing. However, the younger generation appreciates trying new food products and beverages. Still, in surveys, Croatians repeatedly state a preference for foods without artificial flavors, stabilizers, emulsifiers, preservatives and with minimum pesticide treatments or genetically engineered ingredients. At the same time, actual buying habits show the main determining factor for the purchasing decision is the lower price regardless of the composition. As a result of the economic crisis, consumers tend to buy less expensive meat cuts and mostly poultry. The economic downturn also has spurred an increase in supermarket private label and generic-brand purchases. The following are highlights from a publicly available market research survey conducted in October 2009 by Gfk, a market research agency[2]:

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[2] Gesellschaft für Konsumforschung, Gfk: Recognition of Healthy Foods, 2009

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

Functional foods - Research from 2009 showed that 57% of respondents have heard of functional foods like omega-3 margarine and Lactobacillus rahmnosus GG (LGG) yogurt (yogurt with probiotics).

Organic foods – In 2009, most Croatians claimed to have heard of organic products. Approximately half of the respondents said that they are able to distinguish organic products in shops. Approximately 72% of the respondents said they recognized the products as organic because of a logo "Croatian Eco Product" or by seeing a label with a statement "healthy product". Only 4% of the 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. Similar research in 2011/2012 showed that the percentage of organic product buyers has decreased, possibly because of the economic downturn. In the 2011/2012 survey 66% of Croatian consumers were aware of organics and 20% buy organics from time to time. However, the long term forecast is that this market segment will grow when the economic situation improves in Croatia.

"Gfk" also found in a March 2010 survey on "How we eat"[3] *that:*
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 a staple for 50% of the respondents, dark bread is consumed by 30% of the respondents and integral bread is consumed by 19% of the respondents. More than half of the respondents consume cakes and sweet cookies daily and weekly. Chocolate also is consumed by 60% of the respondents daily and weekly. Coffee is consumed daily by 80% of the respondents. In terms of daily dairy product consumption: 54% consume milk, 33% consume plain yogurt and 30% consume cheese. Croatians claim to value: good quality and good taste (each approximately 95%); low price, domestic origin, no artificial coloring or flavoring (each approximately 65%); and no preservatives (56%) and low fat (also approximately 56%). Half of the respondents stated it was important to know the producer and that the product is organic in origin. The least valued characteristics were whether it was a foreign producer (11%) or had attractive packaging (24%). Some changes can be seen in consumer habits in that they are eating more fruits and vegetables, less fatty food, less "fast food", and drinking more fluids.

Research done in 2011 by the Croatian Food Agency[4] revealed that a large number of Croatians think that domestic food is safer than imported food and that food was generally safer ten years ago. Their research showed that Croatians mostly worry about pesticide residues in food, food quality and freshness, GMOs, antibiotics, and hormones.

Trade Regulations, Customs, and Standards

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[3] Gesellschaft für Konsumforschung, Gfk: How we eat, 2010
[4] Croatian Food Agency: Research on Fear from Food Health Risk on Croatian Consumers, 2011

Croatia's agricultural sector is governed by The Common Agricultural Policy (CAP). Similarly, Croatia, as the 28th EU Member State, employs the same tariffs and border measures as all other EU Member States. Products imported into Croatia need to meet all the Croatian and EU food safety and quality standards, as well as labeling and packaging regulations. It is important to work with experienced importers and/or to have an agent to work with the Croatian regulatory authorities to ensure the acceptability of specific products. Personal relationships and language skills are valuable when conducting business transactions. For more information on Food and Agricultural Import Regulations and Standards, please see post's latest FAIRS report at FAS Zagreb.

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 initiates the clearance process by submitting the required documents to the Inspection Departments and the Customs Office see FAIRS report for Croatia at FAS Zagreb. The procedure starts at the Sanitary Inspection Department of the Ministry of Health, which checks all products (except animal products, which are checked by the Veterinary Inspection Department from the Ministry of Agriculture). Random sampling is done for food safety, quality and biotech testing. The owner of the consignment (usually the importer) must pay for product inspections. If the products are deemed to be of suspicious quality and/or of health concern the consignment is held until all of the results from the analyses are received. 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 have been checked by the sanitary or veterinary inspector for ingredients and health standards.

Import certificates must be in the official language of Croatia, which is Croatian. For the time being, however, the English version of certificates is being accepted by the inspection team although this is considered to be a temporary measure. At some point in the near future, goods will be expected to be accompanied by bilingual certificates (English and Croatian).

Average length of customs clearance for food products is one day, if all documents are in order and the consignment is not randomly selected for testing. Otherwise, customs clearance when awaiting test results can take between 5-10 days.
Complete information on EU import rules for food products may be found at: http://www.usda-eu.org/trade-with-the-eu/eu-import-rules/ and for Croatian specifics refer to the latest FAIRS report for Croatia at FAS Zagreb.

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". Supermarkets developed rapidly in Croatia, leaving the traditional retail system for food far behind. Currently most consumers shop at supermarkets and imports are being distributed increasingly through the larger supermarkets. In 2014, Croatia's total import of consumer foods was over $1.9 billion.

Trends in 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 thru mostly mailing flyers. Consumer participation contests on TV and radio are also very common.

For traders from the US, trade shows remain an excellent way for U.S. exporters to make contact with potential Croatian business partners, to conduct product introductions and to gauge buyers' interest. Detailed information about USDA endorsed shows in Europe this year can be found at http://www.fas.usda.gov/international-trade-shows-2015 or on the FAS Zagreb website at FAS Zagreb .

Trends in Tourism Sales

Tourism, although highly seasonal, is an important economic activity in Croatia. Each year between 10-12 million foreign tourists visit Croatia (compared to Croatia's population which is just under 4.2 million). The majority of visitors come from Germany, Italy, Slovenia, Austria, the Czech Republic, Poland, France, the Netherlands, Hungary, Slovakia, the UK and Bosnia &Herzegovina. Tourists from countries outside of Europe are mostly from America and recently from Japan. Tourism infrastructure is satisfactory, but still developing.

Trends in Internet Sales

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

While retail online transactions in Croatia still represent only a small percentage of total retail trade in the country, e-commerce in Croatia is considered to be a common place occurrence. Internet access is available throughout most of the country and is heavily used.

IV Best High Value Product Prospects

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

Product Category	2014 Imports	5-Yr. Avg. Annual Import Growth in value (2009-2014)	Import Tariff Rate 2014	Key Constraints of Market Development	Market Attractiveness for USA
Pork	$237million (79,66 MT)	10.60%	See at: http://ec.europa.eu/ taxation_customs/ customs/ customs_duties/ index_en.htm	Only companies that are registered exporters of pork for the EU market can supply the Croatian market. Competition from EU companies.	Croatian meat processors are importing significant quantities of pork because of the volatile domestic situation. Domestic pig production is cyclical and responds to the price of feed. In addition, sometimes there is a market shortage of products that meet certain quality standards.
Snack Foods	$232million (56,018MT)	8.71%		Strict biotech legislation and competition from other EU member states and Croatian franchises.	Growing market.
Fish & Sea Food (products)	$115million (29,948MT)	3.12%		Competition from some E.U. seafood exporting Member States.	Demand and consumption should pick up again and grow along with tourism over the next several years.
Pet Food (Dog & Cat Food-retail)	$54million (45,319MT)	2.53%		Competition from European companies and US franchisees in the European Union.	Croatia doesn't produce pet food domestically. Production and usage of these products is expected to grow with an increase in the standard of living.
Beef	$67million (14,793MT)	9.68%		Strict EU legislation prohibiting imports from animals treated with growth promotants. High quality beef quota	Croatia does not produce sufficient quantities.
Tree Nuts	$25million (3,080MT)	10.19%		Market is price sensitive and must conform to EU certification schemes and quality standards.	Croatia does not produce sufficient quantities and quality varies.
Wine	$32million (22,394,431 Liters)	18.98%		High transportation costs. Significant competition from EU origin wines.	Consumption of quality wines is expected to grow with Croatia's standard of living.
Rice	$12million (11,350MT)	-0.57%		Transshipments from other EU member states.	Croatia has no domestic production.

V. Key Contacts and Further Information

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APPENDIX I – STATISTICS

TABLE A. KEY TRADE AND DEMOGRAPHIC INFORMATION

Ag Imports From All Countries ($Mil)/US Share %	2014	3,303[1]/0.57%[1]
Consumer Food Imports From All Countries ($Mil)/US Share %	2014	1,996[1]/0.76%[1]
Edible Fish Imports From All Countries ($Mil)/US Share %	2014	115[1]/0.57%[1]
Total Population (Millions)/Annual Growth Rate per 1000	2014/2013	4.2[2]/-2.5[2]
Urban population (Millions)/Annual Growth Rate (%)	2014	59%[3]/0.11%[3]
Number of Major Metropolitan Areas (population in excess of 1 million)	2014	0[2]
Size of the Middle Class (Millions)/Growth Rate (%)	2014	n.a.
Per Capita Gross Domestic Product	2014	$13,480[4]
Unemployment Rate ILO (%)	2014	17.3%[5]
Per HOUSEHOLD Food Expenditures (US Dollars)	2014	$ 7,916[6]
Percent of Female Population Employed	2014	38%[5]
Exchange Rate (US$1 = X.X local currency)	2014	$1=HRK 5.75[7]

1. Source: Global Trade Atlas
2. Source: Croatian Bureau of Statistics, estimate (2011 census)
3. CIA The World Fact Book
4. Croatian Chamber of Economy, Selected Economic Indicators of Croatian Economy
5. Source: Croatian Bureau of Statistics
6. Source: Euromonitor
7. Source: Croatian National Bank

TABLE B. IMPORTS OF AGRICULTURE, FISH & FORESTRY PRODUCTS

Croatia Imports (In Millions of US Dollars)									
	Imports from the World			Imports from the US			US Market Share		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
CONSUMER ORIENTED AGRICULTURAL	1,514	1,789	1,996	21	17	15	1.42%	0.97%	0.76%
Snack Foods (Excl. Nuts)	169	198	232	0	0	0	0.02%	0.00%	0.01%
Breakfast Cereals & Pancake Mixes	20	22	23	0	0	0	0.05%	0.00%	0.00%
Red Meats, Fresh/Chilled/Frozen	198	245	304	0	0	0	0.01%	0.03%	0.00%
Red Meats, Prepared/Preserved	46	52	65	0	0	0	0.07%	0.00%	0.00%
Poultry Meat	40	50	60	0	0	0	0.00%	0.00%	0.00%
Dairy Products (Excl. Cheese)	97	153	134	0	0	0	0.00%	0.00%	0.01%
Cheese	44	60	68	0	0	0	0.00%	0.00%	0.00%
Eggs & Egg Products	11	12	17	0	0	0	0.22%	1.81%	0.32%
Fresh Fruit	134	152	160	0	0	0	0.00%	0.00%	0.00%
Fresh Vegetables	63	86	92	0	0	0	0.00%	0.00%	0.00%
Processed Fruits & Vegetables	126	133	149	2	2	2	1.86%	1.86%	0.80%
Fruit and Vegetable Juices	15	16	17	0	0	0	1.08%	0.00%	0.01%
Tree nuts	19	23	25	7	6	7	34.28%	25.19%	26.42%
Wine & Beer	41	50	71	0	0	0	0.38%	0.11%	0.05%
Nursery Products & Cut Flowers	44	38	43	0	0	0	0.67%	0.28%	0.00%
Pet Foods (Dog & Cat Food)	48	53	54	1	1	0.4	0.98%	0.85%	0.71%
Other Consumer Oriented Products	390	433	467	11	8	7	2.92%	1.88%	1.46%
FISH & SEAFOOD PRODUCTS	108	101	115	2	2	1	1.94%	1.51%	0.57%
Salmon	2	3	4	0	0	0	0.8%	0.00%	0.00%
Surimi	0	0	0	0	0	0	0.00%	0.00%	0.00%
Shellfish	14	12	13	0	0	0	0.94%	0.24%	0.00%
Groundfish & Flatfish	7	6	6	0	0	0	0.15%	0.00%	0.00%
Molluscs	29	24	31	1	1	1	4.21%	2.11%	2.07%
Other Fishery Products	57	55	61	1	1	0	1.29%	1.79%	0.01%
AGRICULTURAL PRODUCTS TOTAL	2,393	2,639	2,887	25	22	18	1.03%	0.84%	0.61%

Source: Global Trade Atlas

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

CONSUMER-ORIENTED AGRICULTURAL IMPORTS

	Import in USD$1,000		
Croatia - Top 15 Suppliers	**2012**	**2013**	**2014**
Germany	271,258	357,363	399,514
Italy	207,303	229,495	265,694
Netherlands	125,239	145,413	200,956
Hungary	84,222	146,802	164,494
Slovenia	67,136	85,332	139,642
Poland	93,704	117,999	136,587
Austria	79,368	103,417	125,410
Spain	64,226	73,182	80,840
Serbia	35,726	43,703	55,050
Bosnia & Herzegovina	89,585	72,143	49,915
Macedonia	37,758	41,231	44,993
Czech Republic	22,157	38,806	42,026
Belgium	29,727	39,539	39,858
France	27,452	29,472	30,031
Denmark	15,486	15,770	22,040
Other *(22. United States)*	263,689 *(21,445)*	245,887 *(17,404)*	198,794 *(15,149)*
World	**1,514,036**	**1,785,554**	**1,995,844**

Source: Global Trade Atlas

FISH & SEAFOOD PRODUCTS IMPORTS

Croatia - Top 15 Suppliers	Import in USD$1,000		
	2012	2013	2014
Spain	18,655	23,795	32,289
Italy	6,704	11,763	19,602
Thailand	4,511	4,236	6,116
Slovenia	2,663	2,908	5,535
Germany	1,608	2,453	4,861
Argentina	5,972	5,668	4,022
United Kingdom	5,567	3,790	3,746
China	3,663	2,732	3,176
Denmark	1,148	3,080	3,067
Netherlands	340	1,105	2,894
Vietnam	3,617	2,740	2,714
Indonesia	2,799	2,454	2,670
Sweden	5,234	3,901	2,602
Poland	1,359	2,078	2,226
Lithuania	434	876	2,167
Other *(26. United States)*	43,664 *(2,089)*	27,881 *(1,528)*	17,254 *(652)*
World	**107,938**	**101,460**	**114,941**

Source: Global Trade Atlas