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Exporter Guide

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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 good long-term importer of some U.S. food products, including seafood, animal genetics, wine, and consumer food products. Croatian imports of consumer food items have almost doubled from $267 million in 1993 to $416 million in 2000. Croatian consumers are 'anti-biotech' and U.S. meat products may not currently be exported to Croatia due to a lack of negotiated USDA/FSIS meat export certificates.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Vienna [AU1], HR

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 unwillingness to tackle some difficult privatization and labor issues. The prospect of becoming an EU candidate country in 2003 should help the government focus its economic reform efforts. Croatia is a member of the WTO and has signed at least 26 bilateral trade agreements in an effort to liberalize trade.

For 2002, real GDP is forecast to grow around three percent and the official unemployment rate will remain over 20 percent. Per capita GDP is well over $5,000 but reductions in government spending and only minimal increases in wages will act as a brake on consumption growth, which is forecast to be less than four percent. Import demand will remain strong and is driven by both investment and consumer demand. The Croatian currency, the Kuna, is relatively stable and exchange rates have been between seven and eight Kuna to the dollar for the first part of 2002. Inflation in 2001 was 4.9 percent and it is expected to remain at that level. Tourism foreign currency earnings will keep the account deficit from rising significantly and foreign direct investments should easily cover the current account in 2002. Gross foreign debt is estimated to be around $12.5 billion or just over half of annual GDP. Croatia has begun privatizing the two largest remaining state owned companies INA (oil and gas) and HEP (electricity).

Demographic Developments and Their Impact on Consumer Buying Habits

Croatia's population is about 4.3 million and is stable. The age distribution is as follows: 0 to 20 years/20 percent; 20 to 65 years/68 percent; 65 and over/12 percent (2001 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. On average, only one person in three within a household is employed.

Food Expenditures

In 2000, household expenditures for foods and beverages were 27 percent of total expenditures. This is a decline of about five percent from 1998.

Size and Growth of the Consumer Foods Market

General

In 2001, the value of the food retail sector was 43,400,000,000 Kn ($5,100,000,000) including VAT, which corresponds to more than two-thirds of total retail trade. Comparing 2001 with 2000, sales rose 9 percent; however, sales growth for the previous year was nearly 100 percent. Last year, Croatia imported agricultural products and food valued at $845,000,000, which is 23 percent more than in 2000, and exported only $469,698,590. Imports for 2002 are expected to be significantly higher and this has led to some populist demands for the government to take steps to limits food imports. There is little specific data on sales of food products by class or type.

Beverages

The Croatian Chamber of Commerce tracks sales for different types of beverages. For 2001, it found that Croatians consumed 579,901 hl of juices from fruits and vegetables, 1,761,136 hl of mineral waters and refreshing drinks, 3,796,021 hl of beer, 494,284 hl of wine and 154,869 hl of other alcoholic drinks.

Consumption per household of coffee, tea, cocoa, mineral water, soft drinks, fruit juices, syrups and concentrates is around 53 liters and growth in the use of the products is flat. Mineral water accounts for 22 liters of the average and soft drinks just 10 liters.

Total beverage imports were about $92.5 million in 2001, of which mineral water accounted for $26.6 million.

Food service (Restaurants)

Hotels and restaurants in 2001 sold foods and drinks valued at 2,490,955Kn ($294,439). Sales in this sector have been stable over the last four years.

About 18 percent of young employed Croatians regularly consume fast food.

Pet Food

The Croatian pet food market grew by19 percent in the past three years and dog and cat food imports totaled $13.2 million in 2001. Croatia does not yet domestically produce pet food. Trade data indicate only a small percentage of pet food imports come directly from the United States but U.S. brands are commonplace and several are made with U.S. ingredients in Western Europe. Future growth is expected as the population ages and standards of living rise. (See HR 2010 for more information.)

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. Seafood consumption is around seven kilograms per capita. Total imports of fish in 2001 were $46,476,956. Of this, $17,031,566 was frozen fish, a 50 percent increase over 1999. (See HR 2002 for more information.)

Advantages and Challenges of U.S. Suppliers on the Croatian Market

Advantages	Challenges
Growth in tourism	Negative attitude towards foods containing or made from genetically modified organisms
Urban population growing	Reservation towards products with chemical food additives
An aging population	U.S. food products are at a tariff disadvantage compared to good from the EU, EFTA or CEFTA countries
Certain fruits, vegetables, dried fruits and rice are not produced domestically	High shipping costs
Shortages of some agricultural products like beef, soybean meal, and 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 private companies like Getro, Konzum (Agrokor), Diona (Globus Holding) and Prehrana (Brodokomerc). Foreign retailers (Billa, DM, Merkur, Mercatone, Euroviba, Metro, Ikea, etc.) have started to enter the market as well, creating more competition. Large supermarket chains have their own purchasing sections that buy, store, and distribute foodstuffs centrally. The purchasing units also carry out imports. However, some items are purchased through specialty wholesale importers. In an effort to become more competitive with the consolidating retail food sector, 800 Croatian shops recently merged purchasing departments into purchasing groups called CBA and Ultra. There are an estimated 7,500 retail outlets of all types in Croatia.

General Consumer Tastes and Preferences

Croatians, in general, reject food that contains or is made from genetically modified organisms (GMOs). According to some newspaper polls, 80 percent of the population is opposed to the technology. Consumers generally will not buy food containing GMOs even if it is considerably cheaper. (See HR 1008 for more information on GMOs in Croatia.) Demand for health foods is also increasing from a modest base and one Internet poll showed that 24 percent of respondents eat organic food (note: this poll was informal).

Consumption of 'light' or dietary products is increasing. Sugar free chewing gums are more popular than gums with sugar. Croatians prefer fresh milk, powdered or heat treated. They prefer edible vegetable oil to animal fats, and chocolates to other sweets. Smoked and salted meats are popular.

Food Standards and Regulations

See the Agricultural Import Regulations and Standards Report (HR 2009) for information on standards and regulations.

General Import and Inspection Procedures

After goods arrive in a customs storage warehouse, the importer (or a freight forwarder) begins the customs clearance process. Samples for quality control are taken for all shipments. Based on a history of acceptable imports, a border inspector (sanitary or veterinary) may only inspect periodically, usually every three months. Fees for product inspection must be paid by the importer. Custom import documents may be in English.

Required documents for meat imports may be found at:
http://www.veterinarstvo.hr/import/index.htm.

Customs rates and documents for initializing procedure for goods clearance can be found at: http://www.carina.hr (since this web site is in Croatian only, contact your Croatian partner or freight forwarding companies for clarification).

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.' Today, Croatia has about 16,000 shops, or roughly 3,500 shops per million inhabitants. Most of these are small neighborhood shops and kiosks. Croatia's total imports of consumer foods almost doubled, from $267 million in 1993 to $416 million in 2000. Increasingly, imports are being distributed through large (multinational) supermarkets. (See HR 2008 for more information on the Croatian food retail sector.)

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

In 2000, tourism accounted for 15 percent of Croatia's GDP, 32 percent of total exports and 68 percent of total services exported. The Croatian Tourism Association predicts that international tourist arrivals will increase 10 percent and domestic for 5 percent annually.

The majority of tourists come form Germany (9.7 million), Slovenia (5.1 million), Italy (4.7 million), and the rest from Austria, Hungary and Slovakia.

Croatia offers summer and winter tourism, nautical, ecological, hunting, fishing and country tourism. Tourists 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. (See HR 2002 for more in the Croatian market for seafood.)

Internet Sales

The popularity of the Internet in Croatia is fast approaching that of Western levels and some Internet polls show that 73 percent of users think online shopping has a future. Despite this, there are no companies providing online sales of retail food products.

IV. Best High–Value Product Prospects

The 15 consumer food/edible fishery products that offer the best U.S. export opportunities are as follows:

Meats for use in processing (esp. pork)
Beverages, including mineral water and U.S. wines
Pet food
Hake
Grouper
Salmon
Shark fillets
Swordfish fillets
Squid
Convenience and processing fish products
Juice concentrate
Dried fruits
Fruits and product from fruits
Frozen vegetables
Rice

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Appendix I. Statistics

A. Key Trade & Demographic Information

CROATIA

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries ($Mil) / US Market Share %	2000	670 / 0.79%
Consumer Food Imports From All Countries ($Mil.) / US Market Share %	2000	416 / 0.85%
Edible Fishery imports From All Countries ($Mil) / US Market Share %	2000	33 / 3%
Total Population (Millions) / Annual Growth Rate (%)	2001	4.4 / -0.15
Urban population (Millions) / Annual Growth rate (%)	1991	2.6 / n.a.
Number of Major Metropolitan Areas	2001	1(809,701)
Size of the Middle Class (Millions) / Growth Rate (%)		n.a.
Per Capita Gross Domestic Product (US Dollars)	2000	$4,343.90
Unemployment Rate (%)	2001	22.3%
Per capita Food Expenditures (US Dollars)	2000	$919.40
Percent of Female Population Employed		n.a.
Exchange Rate (US$1 = X.X local currency)	2002 (first three months)	$1=8.34Kn

B. Consumer Food & Edible Fishery Product Imports

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

	Imports from the World			Imports from the U.S.			U.S Market Share		
	1998	1999	2000	1998	1999	2000	1998	1999	2000
BULK AGRICULTURAL TOTAL	130	93	87	21	1	1	16%	0.67%	0.43%
Wheat	7	1	1	6	0	0	81%	0%	0%
Coarse Grains	3	6	3	1	1	1	0.69%	0.12%	0.73%
Rice	5	5	5	1	1	1	0.64%	0.59%	2%
Soybeans	27	10	7	15	0	0	57%	0%	0%
Other Oilseeds	3	2	2	1	1	1	13%	10%	6%
Cotton	6	4	5	1	1	0	0.24%	6%	0%
Tobacco	16	16	20	0	1	0	0%	0.53%	0%
Rubber & Allied Gums	1	1	1	1	1	1	1%	2%	0.31%
Raw Coffee	52	39	32	1	0	0	0.13%	0%	0%
Cocoa Beans	7	6	5	0	0	0	0%	0%	0%
Tea (Incl. Herb Tea)	1	1	1	1	1	0	0.89%	0.68%	0%
Raw Beet & Cane Sugar	1	1	1	0	0	1	0%	0%	2%
Pulses	1	2	2	1	1	1	4%	4%	4%
Peanuts	1	2	1	0	0	0	0%	0%	0%
Other Bulk Commodities	1	1	1	0	1	0	0%	0.43%	0%
INTERMEDIATE AGRICULTURAL TOTAL	188	150	168	1	1	1	0.55%	0.86%	0.85%
Wheat Flour	1	1	1	0	0	0	0%	0%	0%
Soybean Meal	17	14	16	1	1	1	2%	3%	0.83%
Soybean Oil	2	1	2	0	0	0	0%	0%	0%
Vegetable Oils (Excl. Soybean Oil)	34	20	12	1	1	1	0.03%	0.06%	0.19%
Feeds & Fodders (Excl. Pet Foods)	15	13	12	1	1	1	0.78%	0.73%	0.43%
Live Animals	40	29	46	0	0	0	0%	0%	0%
Hides & Skins	2	3	11	1	0	1	0.30%	0%	0.62%
Animal Fats	2	1	1	0	0	0	0%	0%	0%
Planting Seeds	5	5	5	1	1	1	4%	1%	3%
Sugars, Sweeteners, & Beverage Bases	10	7	11	0	0	0	0%	0%	0%
Essential Oils	17	15	15	1	1	1	0.05%	0.02%	0.03%
Other Intermediate Products	44	41	35	1	1	1	0.62%	2%	3%
CONSUMER-ORIENTED AGRICULTURAL TOTAL	505	431	416	4	4	4	0.73%	0.93%	0.85%
Snack Foods (Excl. Nuts)	38	36	33	1	1	1	0.08%	0.24%	0.18%
Breakfast Cereals & Pancake Mix	4	4	4	0	1	0	0%	0.21%	0%
Red Meats, Fresh/Chilled/Frozen	46	29	38	1	0	0	0.56%	0%	0%

Red Meats, Prepared/Preserved	35	21	19	1	0	0	0.10%	0%	0%
Poultry Meat	2	2	2	1	1	0	0.66%	0.59%	0%
Dairy Products (Excl. Cheese)	55	38	44	1	1	1	0.06%	0.16%	0.04%
Cheese	15	11	11	0	0	1	0%	0%	0.35%
Eggs & Products	2	1	1	1	1	1	12%	22%	13%
Fresh Fruit	56	53	45	0	0	1	0%	0%	0.01%
Fresh Vegetables	25	18	17	1	1	1	0.01%	0.27%	0.10%
Processed Fruit & Vegetables	49	46	45	1	1	1	0.25%	0.67%	0.63%
Fruit & Vegetable Juices	15	12	11	1	1	1	0.01%	0.03%	0.50%
Tree Nuts	6	5	4	1	1	1	9%	11%	10%
Wine & Beer	14	10	10	1	1	1	0.08%	0.36%	0.58%
Nursery Products & Cut Flowers	17	16	13	0	1	1	0%	0.24%	0.06%
Pet Foods (Dog & Cat Food)	11	11	11	1	1	1	5%	6%	0.90%
Other Consumer-Oriented Products	117	118	110	2	2	2	2%	2%	2%
FOREST PRODUCTS (EXCL. PULP & PAPER)	119	94	98	2	1	1	1%	2%	2%
Logs & Chips	5	3	5	1	0	0	0.02%	0%	0%
Hardwood Lumber	4	4	5	0	0	1	0%	0%	0.66%
Softwood and Treated Lumber	40	28	23	1	1	1	0.45%	0.56%	0.01%
Panel Products (Incl. Plywood)	33	33	41	1	1	1	4%	4%	4%
Other Value-Added Wood Products	37	27	25	1	1	1	0.27%	0.25%	0.07%
FISH & SEAFOOD PRODUCTS	30	29	33	1	1	1	0.60%	2%	3%
Salmon	1	1	1	1	1	1	1%	3%	5%
Surimi	1	1	1	1	0	0	0.28%	0%	0%
Crustaceans	2	2	2	1	0	0	0.12%	0%	0%
Groundfish & Flatfish	8	6	6	1	1	1	0.71%	3%	0.04%
Molluscs	8	8	8	1	1	1	1%	5%	12%
Other Fishery Products	11	12	17	0	0	1	0%	0%	1%
AGRICULTURAL PRODUCTS TOTAL	824	674	670	26	6	5	3%	0.87%	0.79%
AGRICULTURAL, FISH & FORESTRY TOTAL	972	797	802	28	8	8	3%	1%	0.99%

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

C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products

Table C1

AGRICULTURAL, FISH & FORESTRY TOTAL
900

Croatia imports as derived from available exporter data Top 15 ranking	Import		
	1998	1999	2000
	1,000 $	1,000 $	1,000 $
Italy	127,329	100,078	104,863
Slovenia	128,923	107,478	104,061
Germany	98,006	83,371	84,092
Hungary	92,899	73,927	68,508
Austria	79,727	65,158	63,938
Netherlands	47,743	42,500	41,184
Brazil	27,997	44,246	35,765
France	37,367	33,751	25,662
Spain	21,376	21,915	21,230
Poland	11,945	12,968	19,278
Czech Republic	14,449	10,193	15,592
Ireland	3,034	1,580	13,344
Romania	3,915	5,102	10,162
Denmark	7,274	6,082	8,093
Belgium	NA	7,921	8,035
Other	116,358	67,909	34,387
Total	818,342	684,179	658,194

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 C2

BULK AGRICULTURAL TOTAL
100

Croatia imports as derived from available exporter data Top 15 ranking	Import		
	1998	**1999**	**2000**
	1,000 $	**1,000 $**	**1,000 $**
Italy	4,946	5,058	7,270
Hungary	17,760	18,359	6,238
Austria	935	1,650	3,205
Germany	2,672	1,715	2,970
Romania	0	32	1,539
Slovenia	1,171	1,226	1,046
Netherlands	503	384	640
Canada	45	163	560
France	1,379	165	407
China (Peoples Republic of)	0	57	356
United States	14,359	1,669	207
Belgium	NA	104	102
Czech Republic	72	48	91
United Kingdom	107	33	56
Thailand	0	0	23
Other	12,754	8,821	70
Total	56,703	39,484	24,780

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 C3

INTERMEDIATE AGRICULTURAL TOTAL
200

Croatia imports as derived from available exporter data Top 15 ranking	Import		
	1998	1999	2000
	1,000 $	1,000 $	1,000 $
Germany	30,610	27,614	28,269
Hungary	32,483	23,067	24,062
Italy	21,880	16,360	17,707
Ireland	354	218	11,282
Slovenia	14,220	9,641	10,213
Poland	6,923	5,770	9,919
Romania	1,249	2,790	6,762
Netherlands	6,002	4,894	6,393
France	16,030	14,244	6,110
Austria	9,340	6,384	6,057
Czech Republic	8,010	3,872	3,641
Sweden	3,350	749	3,141
Russian Federation	1,825	161	1,523
United Kingdom	859	1,270	1,126
Denmark	803	718	835
Other	24,979	17,623	2,797
Total	178,917	135,375	139,837

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 C4

CONSUMER-ORIENTED AGRICULTURAL TOTAL
400

Croatia imports as derived from available exporter data Top 15 ranking	Import		
	1998	1999	2000
	1,000 $	1,000 $	1,000 $
Italy	83,630	66,277	68,399
Slovenia	70,453	64,086	59,960
Germany	52,746	42,609	41,738
Austria	49,800	41,399	38,016
Brazil	27,819	43,908	35,670
Netherlands	40,051	35,912	33,070
Hungary	35,123	27,192	31,817
France	18,202	18,048	17,896
Spain	16,350	12,563	13,350
Czech Republic	3,916	4,414	9,668
Poland	4,898	7,013	7,563
Belgium	NA	4,807	6,425
Denmark	5,584	4,004	6,196
Turkey	4,225	4,021	4,547
Switzerland	2,074	2,073	4,189
Other	43,940	29,623	12,410
Total	458,811	407,949	390,914

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 C5

FOREST PRODUCTS (EXCL. PULP & PAPER)
600

Croatia imports as derived from available exporter data Top 15 ranking	Import		
	1998	1999	2000
	1,000 $	1,000 $	1,000 $
Slovenia	41,928	31,425	31,444
Austria	18,215	15,643	16,515
Germany	10,551	10,392	10,188
Hungary	7,529	5,307	6,382
Italy	8,213	6,686	6,238
Czech Republic	2,445	1,843	2,104
United States	625	704	1,381
Romania	220	395	984
Belgium	NA	918	980
Sweden	431	581	745
France	1,077	697	699
Poland	0	185	560
Finland	919	550	423
Canada	1,024	283	322
Switzerland	92	159	319
Other	8,058	5,622	1,291
Total	101,327	81,390	80,575

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 C6

FISH & SEAFOOD PRODUCTS
700

Croatia imports as derived from available exporter data Top 15 ranking	Import		
	1998	1999	2000
	1,000 $	1,000 $	1,000 $
Spain	4,462	6,125	7,138
Italy	8,660	5,697	5,249
Norway	1,143	1,626	1,843
Slovenia	1,151	1,100	1,398
Poland	124	0	1,236
Netherlands	1,133	1,241	1,016
Denmark	429	594	981
Germany	1,427	1,041	927
France	679	597	550
Thailand	580	619	373
United Kingdom	283	350	227
Ireland	165	92	198
Turkey	313	32	182
Iceland	295	503	154
Austria	1,437	82	145
Other	303	282	471
Total	22,584	19,981	22,088

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