

USDA Foreign Agricultural Service

GAIN Report

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Fruits and Vegetables Market Brief

Report Categories:

Fresh Fruit

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Report Highlights:

Vegetable and fruit production is extremely diverse in Croatia. However, local production covers less than 2/3 of total consumption. In 2009, Croatia produced 851,000 MT of fruit juices; 11,000 MT of canned vegetables, and 13,000 MT of vegetables preserved in vinegar. Imports of fresh and processed fruit and vegetables, excluding fruit juices, totaled \$316 million in 2009.

The most interesting sectors of the Croatian market to US exporters are the fresh fruit and the processed fruit and vegetables sectors. In the fresh fruit segment, Croatia mainly imports bananas, oranges, lemons, grapes, apples, peaches, pears, kiwi, watermelons, mandarins, grapefruit, pineapple, apricots and strawberries. In 2009, the United States shipped negligible amounts of fruit to Croatia but the potential, mainly for citrus, is around \$40 million. In processed fruit and vegetables segment, the US exported products valued at \$2.3 million to Croatia in 2009 and the potential for increased trade exists.

General Information:

Market Overview

Vegetable and fruit production is extremely diverse in Croatia. Local production, which covers less than 2/3 of total consumption, is increasing only slightly. Croatia is more self-sufficient in vegetable production than it is in fruit production. Imported fruit, mainly of tropical and subtropical fruits, provide a significant share of total fruit consumption. Fruit production in Croatia consists largely of apples and mandarins, with an average aggregate production of 103,000 tons during 2006–2008. Additionally, plums and cherries are also produced. Plums are mainly used to produce plum brandy and cherries are canned or turned into cherry brandy. In the vegetable sector, cabbage and paprika dominate with an average aggregate production of 70,000 tons during 2006–2008. Onion and garlic as well as tomato, watermelon, and cucumber/gherkins are also produced in larger quantities.

Croatian Vegetable and Fruit Production (2008 and 2009):

<i>Vegetables</i>	<i>Total, MT 2008</i>	<i>Total, MT 2009</i>	<i>Fruits</i>	<i>Total, MT 2008</i>	<i>Total, MT 2009</i>
<i>Cauliflower and broccoli</i>	5 049	4 652	<i>Apples</i>	80 201	93 355
<i>Cabbage, white</i>	50 619	66 833	<i>Pears</i>	8 849	9 950
<i>Other brassicas</i>	6 571	4 978	<i>Peaches and nectarines</i>	7 348	10 110
<i>Lettuce</i>	7 640	7 854	<i>Apricots</i>	1 493	1 583
<i>Leek</i>	2 556	3 175	<i>Cherries</i>	14 674	14 125
<i>Other leafy or stalked vegetables</i>	4 593	5 039	<i>Sweet cherries</i>	8 009	7 148
<i>Tomatoes</i>	32 358	37 419	<i>Sour cherries</i>	6 665	6 977
<i>Cucumbers and gherkins</i>	14 795	14 516	<i>Plums</i>	48 614	38 369
<i>Melons</i>	3 622	3 794	<i>Walnuts</i>	6 828	7 226
<i>Watermelons</i>	31 986	40 381	<i>Hazelnuts</i>	1 289	1 384
<i>Red peppers</i>	34 760	35 991	<i>Almonds</i>	905	1 835
<i>Vegetables cultivated for fruit</i>	6 957	5 606	<i>Figs</i>	2 460	2 490
<i>Onions and garlic</i>	35 701	35 634	<i>Mandarins</i>	50 138	37 500
<i>Carrots</i>	7 629	10 954	<i>Olives</i>	35 955	32 592
<i>Beetroots</i>	4 722	6 795	<i>Wine grapes</i>	185 256	206 437
<i>Other root vegetables</i>	2 266	1 880			
<i>Beans, runner and French</i>	7 663	9 329			

Croatia also has a strong food processing sector, which produced 851,000 tons of fruit juices, 11,000 tons of canned vegetables, and 13,000 tons of vegetables preserved in vinegar in 2009.

Import/Export Statistics

Croatia imported \$316 million of fresh and processed fruits and vegetables, excluding juices, in 2009. In first eleven months of 2010, Croatia imported \$287 million of these products.

The most interesting sectors of the Croatian market to US exporters are the fresh fruit sector (\$126 million imports in 2009) and the processed fruit and vegetables sector (\$133 million imports in 2009). In the fresh fruit

sector, Croatia imports mainly bananas, oranges, lemons, grapes, apples, peaches, pears, kiwi, watermelons, mandarins, grapefruit pineapple, apricots and strawberries. Fresh fruits are mostly imported from Ecuador, Italy, Spain, Greece, South Africa, Turkey, Argentina, Colombia, Costa Rica, Bosnia and Herzegovina, Austria, Macedonia, Chile, Slovenia and Egypt. In 2009 US shipped to Croatia negligible amounts of cranberries, lemons and grapes valued at \$8,307 but the potential, mainly for citrus export, is around \$40 million. Croatia mostly imports citrus from Spain, and Greece and smaller amounts from Turkey, Argentina, Egypt, South Africa and Italy.

In the processed fruit and vegetables sector, Croatia imported mostly processed potatoes, tomato paste, mixed vegetables, processed nuts and seeds, processed fruits, jams, processed vegetables, processed peanuts, and processed beans. These imports were mostly from Italy, Poland, Germany, Belgium, Hungary, Serbia, Austria, Bosnia and Herzegovina, Macedonia, China, and the Netherlands. In processed fruit and vegetables sector, US exporters shipped \$2.3 million in products to Croatia in 2009.

In addition to importing, in 2009 Croatia exported fresh fruit (\$20.6 million), fresh vegetables (\$3.8 million), and processed fruits and vegetables (\$28 million), excluding fruit juices.

Tariffs and VAT

The value added tax (VAT) on all products is 23% at present.

The most recent tariff rates can be found at:

<http://www.carina.hr/ActInternet/MainFrame/AplMainFrame.aspx>

Key Contacts and Further Information

A list of Croatian importers is available to U.S. exporters and can be obtained by contacting:

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