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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. Continuing economic reforms as a result of EU accession and growing tourism make Croatia a potential market for certain U.S. food products, such as seafood, snack foods, pet food, wine, tree nuts, and rice. This report's statistical data were updated in November 2016.

Post:
Zagreb

Executive Summary:

Croatia is a Member State of the European Union (EU), member of the World Trade Organization (WTO) and a NATO member. These memberships provide a security framework for Croatia's improving economic and social prospects. Croatia has progressed considerably in creating a market economy and establishing macroeconomic stability.

Croatia's population is approximately 4.2 million and is slowly decreasing. Elderly and unemployed youth make up two demographic segments with very low purchase power.

Nevertheless, Croatia's total imports of consumer foods have steadily grown over the last few years and approached $2.0 billion in 2015. 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. Tourism, although highly seasonal, is an important economic activity in Croatia.

Trade statistics on U.S. 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 is expected to rise and Croatia is a potential market for certain U.S. food products, such as seafood, snack foods, pet food, wine, tree nuts, and rice.

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. In addition, Croatians say that they prefer organic products as well as locally produced. At the same time, actual buying habits show the main determining factor for purchasing decisions is the lower price regardless of the composition. Croatians oppose GMO products.

Author Defined:

I. Market Overview

Economic Situation and Consumer Buying Habits

On July 1, 2013, Croatia became the 28th EU Member State. In addition, Croatia is a member of the WTO 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 in the past years with 2015 registering an unemployment rate of 16.3 percent, which was actually an improvement over 17.3 percent from 2014. Moreover, GDP has been declining from 2009 to 2014. However, in 2015 Croatia had 1.6 percent GDP growth and in the first quarter of 2016 GDP grew 2.7 percent. There is an expectation that a slow GDP growth trend will continue and send a positive message that will 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. Croatia's external trade imbalances and high foreign debt present risks to continued access to foreign credit.

Although Croatia has made progress in economic and administrative reforms, problems remain in this developing economy. The judiciary system 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 sensitive 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 estimates, 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 the 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 other countries. High unemployment among youth makes them another demographic segment with very low purchase power.

Size and Growth of Consumer Foods and Edible Fishery Products

In 2015, Croatia imported agricultural, fish and forestry products valued at $3.04 billion and exported $2.60 billion worth of these goods, which puts the agricultural trade deficit at approximately $442 million.

Croatia's total imports of consumer foods have steadily grown over the last few years and approached $2.0 billion in 2015. 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 U.S. 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 U.S. companies, provided they can overcome high ocean freight rates into the Adriatic Sea from U.S. 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 $116 million in 2015. Furthermore, Croatia is expected to continue 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 and fish for the local fish processing industry such as sardines and mackerel.

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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.

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, Netherlands, Italy)
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 (Spar) 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 purchasing decisions 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] :

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 percent in 2009. However, in the 2009 study, only 6 percent of citizens would unconditionally buy GMO products, which is a decrease from 8 percent in 2005. The percentage of citizens that do not care about GMOs rose from 9 percent in 2005 to 14 percent in 2009. In addition, in the 2009 study, 29 percent of respondents acknowledged that they didn't know enough about GMO foodstuffs, while only 16 percent said the same in 2005. The study also showed that 90 percent 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 percent 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 percent of the respondents buy organics regularly, 5 percent buy organics often, 24 percent buy organics from time to time, 23 percent rarely buy organics and 43 percent 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 percent of Croatian consumers were aware of organics and 20 percent 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 percent), olive oil (51 percent), lard (41 percent), butter (31 percent) and margarine (26 percent). Most of the respondents (90 percent) eat all types of meat. White bread is a staple for 50% of the respondents, dark bread is consumed by 30 percent of the respondents and integral bread is consumed by 19 percent of the respondents. More than half of the respondents consume cakes and sweet cookies daily and weekly. Chocolate is consumed by 60 percent of the respondents daily and weekly. Coffee is consumed daily by 80 percent of the respondents. In terms of daily dairy product consumption: 54 percent consume milk, 33 percent consume plain yogurt and 30 percent consume cheese. Croatians claim to value: good quality and good taste (each approximately 95 percent); low price, domestic origin, no artificial coloring or flavoring (each approximately 65 percent); and no

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

[3] Gesellschaft für Konsumforschung, Gfk: How we eat, 2010

preservatives (56 percent) and low fat (also approximately 56 percent). 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 percent) or had attractive packaging (24 percent). 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

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 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.

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.

[4] Croatian Food Agency: Research on Fear from Food Health Risk on Croatian Consumers, 2011

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 2015, Croatia's total import of consumer foods was over $1.8 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/search/trade%20shows 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 between10-13 million foreign tourists visit Croatia (compared to Croatia's population which is just around 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	2015 Imports (million $)	5-Yr. Avg. Annual Import Growth in value (2010-	Key Constraints of Market Development	Market Attractiveness for USA

		2015)		
Snack Foods (ex nuts)	$212 (56,018MT)	6%	Strict biotech legislation and competition from other EU member states and Croatian franchises.	Growing market.
Pork	$203 (91,657 MT)	10%	Only companies that are registered exporters of pork for EU market can supply the Croatian market. Competition from EU companies.	Croatian meat processors are importing significant quantities of pork due to 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 quality standards.
Fish & Sea Food (products)	$116 (33,563MT)	4%	Competition from E.U. seafood exporting Member States.	Demand and consumption should pick up again and grow along with tourism over the next several years.
Beef	$69 (17,799MT)	18%	Strict EU legislation prohibiting imports from animals treated with growth promoters. High quality beef quota	Croatia does not produce sufficient quantities.
Pet Food (Dog & Cat Food-retail)	$49 (48,681MT)	0.35%	Competition from European companies and US franchisees in the European Union.	Croatia does not produce any pet food. Production and usage of these products are expected to grow with an increase in the standard of living.
Wine	$32 (29,010,751 Liters)	9%	High transportation costs. Significant competition from EU origin wines.	Consumption of quality wines is expected to grow with Croatia's standard of living.
Tree Nuts	$26 (3,156MT)	10%	Market is price sensitive and must conform to EU certification schemes and quality standards.	Croatia does not produce sufficient quantities and quality varies.
Rice	$10 (10,906MT)	-0.57%	Transshipments from other EU member states.	Croatia has no domestic production.

Import tariff rate see at: http://madb.europa.eu/madb/euTariffs.htm

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 ($Mil)/US Share %	2015	3,043[1]/0.72%[1]
Consumer Food Imports From All Countries ($Mil)/US Share %	2015	1,825[1]/0.72%[1]

Edible Fish Imports From All Countries ($Mil)/US Share %	2015	116[1]/0.87%[1]
Total Population (Millions)/Annual Growth Rate (%)	2014 est.	4.2[2]/-2.7%[2]
Urban population (Millions)/Annual Growth Rate (%)	2015	n.a.
Number of Major Metropolitan Areas (population in excess of 1 million)	2015	0[2]
Size of the Middle Class (Millions)/Growth Rate (%)	2015	n.a.
Per Capita Gross Domestic Product	2015	EUR10,447[3]
Unemployment Rate ILO (%)	2015	16.3%[3]
Per HOUSEHOLD Food Expenditures (US Dollars)	2015	$ 6,065[4]
Percent of Female Population Employed	2014	38%[2]
Exchange Rate (US$1 = X.X local currency)	2015	$1=HRK 6.86[3]

1. Source: Global Trade Atlas
2. Source: Croatian Bureau of Statistics
3. Source: Croatian National Bank
4. Source: Euromonitor

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		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
CONSUMER ORIENTED	1,786	1,996	1,825	17	15	13	0.97%	0.76%	0.72%

AGRICULTURAL									
Snack Foods (Excl. Nuts)	198	232	212	0	0	0	0.00%	0.01%	0.03%
Breakfast Cereals & Pancake Mixes	22	23	21	0	0	0	0.00%	0.00%	0.00%
Red Meats, Fresh/Chilled/Frozen	245	304	264	0	0	0	0.03%	0.00%	0.00%
Red Meats, Prepared/Preserved	52	65	67	0	0	0	0.00%	0.00%	0.00%
Poultry Meat	50	60	56	0	0	0	0.00%	0.00%	0.00%
Dairy Products (Excl. Cheese)	153	134	115	0	0	0	0.00%	0.01%	0.00%
Cheese	60	68	62	0	0	0	0.00%	0.00%	0.00%
Eggs & Egg Products	12	17	16	0	0	0	1.81%	0.32%	0.15%
Fresh Fruit	152	160	151	0	0	0	0.00%	0.00%	0.00%
Fresh Vegetables	86	92	90	0	0	0	0.00%	0.00%	0.00%
Processed Fruits & Vegetables	133	149	138	2	1	1	1.86%	0.80%	0.46%
Fruit and Vegetable Juices	16	17	14	0	0	0	0.00%	0.01%	0.00%
Tree nuts	23	25	26	6	7	6	25.19%	26.42%	22.23%
Wine & Beer	50	71	66	0	0	6	0.11%	0.05%	0.10%
Nursery Products & Cut Flowers	38	43	36	0	0	0	0.28%	0.00%	0.00%
Pet Foods (Dog & Cat Food)	53	54	49	1	0.4	0.4	0.85%	0.71%	0.69%
Other Consumer Oriented Products	433	467	427	8	7	6	1.88%	1.46%	1.46%
FISH & SEAFOOD PRODUCTS	101	115	116	2	1	1	1.51%	0.57%	0.87%
Salmon	3	4	4	0	0	0	0.00%	0.00%	0.00%
Surimi	0	0	0	0	0	0	0.00%	0.00%	0.00%
Crustaceans	12	13	13	0	0	0	0.24%	0.00%	0.00%
Groundfish & Flatfish	6	6	6	0	0	0	0.00%	0.00%	0.00%
Molluscs	24	31	31	1	1	1	2.11%	2.07%	3.23%
Other Fishery Products	55	61	63	1	0	0	1.79%	0.01%	0.03%
AGRICULTURAL PRODUCTS TOTAL	2,639	2,887	2,628	22	18	21	0.84%	0.61%	0.78%

Source: Global Trade Atlas

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

CONSUMER-ORIENTED AGRICULTURAL IMPORTS

Croatia - Top 15 Suppliers	**Import in USD $1,000**		
	2013	**2014**	**2015**
Germany	357,363	399,514	344,320
Italy	229,495	265,694	233,674
Netherlands	145,413	200,956	170,975
Slovenia	85,332	139,642	146,854
Hungary	146,802	164,493	141,881
Poland	117,999	136,587	136,127
Austria	103,417	125,410	118,300
Spain	73,182	80,840	74,906
Serbia	43,703	55,051	48,045
Czech Republic	38,806	42,026	47,358
Bosnia & Herzegovina	72,143	49,915	42,303
Macedonia	41,231	44,993	40,423
France	29,472	30,031	36,119
Belgium	39,539	39,858	35,716
Bulgaria	13,557	20,170	27,235
Other	248,100	200,665	181,180
World	**1,785,554**	**1,995,845**	**1,825,416**

Source: Global Trade Atlas

FISH & SEAFOOD PRODUCTS IMPORTS

Croatia - Top 15 Suppliers	Import in USD $1,000		
	2013	**2014**	**2015**
Spain	23,795	32,289	35,863
Italy	11,763	19,602	17,135
Germany	2,454	4,861	6,590
Slovenia	2,908	5,535	5,954
Argentina	5,668	4,022	5,767
Netherlands	1,105	2,894	3,991
Thailand	4,236	6,116	3,908
Sweden	3,901	2,602	3,800
United Kingdom	3,790	3,746	3,099
China	2,732	3,176	2,921
Denmark	3,080	3,067	2,183
Poland	2,078	2,226	2,107
New Zealand	873	1,659	1,874
Lithuania	876	2,167	1,832
France	2,117	1,624	1,769
Other	30,084	19,355	17,670
World	**101,460**	**114,941**	**116,463**

Source: Global Trade Atlas