

HRVATSKA GOSPODARSKA KOMORA

SEKTOR ZA POLJOPRIVREDU, PREHRAMBENU INDUSTRIJU I ŠUMARSTVO

CROATIAN CHAMBER OF ECONOMY

AGRICULTURE, FOOD INDUSTRY AND FORESTRY DEPARTMENT



POLJOPRIVREDA

UVOD

Hrvatska ima ukupno 1,3 milijuna hektara korištene poljoprivredne površine. Od toga sa 66% zastupljene su oranice i vrtovi, 27% trajni travnjaci, 7% voćnjaci, vinogradi i maslinici, 0,4% povrtnjaci te 0,1% rasadnici.

Zbog očuvane prirode i okoliša, Hrvatska je u prednosti pred drugim razvijenim zemljama te može proizvoditi raznovrsnu hranu visoke kvalitete sigurnu za zdravlje potrošača. Pod ekološkom proizvodnjom nalazi se oko 14.000 ha ili 1,2% od poljoprivrednih površina.

U poljoprivrednoj djelatnosti registrirano je oko 1.200 tvrtki s oko 15.000 zaposlenih.

PROIZVODNJA

Osnovne su prednosti hrvatske poljoprivrede tri različite geografske i klimatske cjeline: ravničarsko područje na sjeveru pod utjecajem kontinentalne klime, priobalno područje na jugu pod utjecajem sredozemne klime te planinski prostor u središnjem dijelu Hrvatske. Raznoliki tipovi klime, reljefa i tla omogućuju proizvodnju širokog asortimana poljoprivrednih proizvoda, od ratarskih i industrijskih usjeva do vinograda te kontinentalnog i mediteranskog voća i povrća.

Na poljoprivredu se nadovezuje raznolika i razvijena prehrambena i prerađivačka industrija s kapacitetima koji ne podmiruju samo domaće potrebe, nego i potrebe tržišta susjednih država.

Poljoprivreda se nadopunjuje turizmom, još jednom značajnom gospodarskom granom.

Najznačajnije tvrtke u poljoprivredi u RH su:

BELJE d.d., Darda, www.belje.hr,

AGROKOR d.d., Zagreb, www.agrokor.hr,

ŽITO d.o.o., Osijek, www.zito.hr,

KOKA d.d., Varaždin, www.vindija.hr,

PIK VINKOVCI d.d., www.pik-vinkovci.hr,

KUTJEVO d.d., Kutjevo, www.kutjevo.com,

AGRICULTURE

INTRODUCTION

Croatia has a total of 1.3 million hectares of cultivated agricultural land, whereof 66% relates to ploughland and gardens, 27% to permanent pastures, 7% to orchards, vineyards and olive grows, 0.4% to vegetables and 0.1% to plant.

Due to well-preserved nature and environment, Croatia has an advantage over other developed countries and is able to produce a variety of food of both high quality and health for consumers. Ecological production spreads over a surface of 14,000 hectares or 1.2% agricultural land.

There are some 1,200 companies registered for agriculture, and they employ around 15,000 employees.

PRODUCTION

The fundamental advantages of Croatian agriculture are the three different geographical and climatic zones: the lowland zone in the north of the country, influenced by the continental climate; the coastal zone in the south, influenced by the Mediterranean climate; and the mountain zone that occupies the central part of Croatia. Various types of climate, relief and soil are favourable for the production of a wide range of agricultural products: from farm and industrial crops to vineyards; from continental to Mediterranean fruits and vegetables.

In addition to agriculture, Croatia has a diverse and well-developed food processing and manufacturing industry. The capacity of this industry is sufficient to satisfy the needs of the domestic market as well as the markets of neighbouring countries.

Agriculture is complemented by tourism, which is another important economic sector.

The most important agricultural companies in the Republic of Croatia are:

BELJE d.d., Darda, www.belje.hr,

AGROKOR d.d., Zagreb, www.agrokor.hr,

ŽITO d.o.o., Osijek, www.zito.hr,

PROIZVODNJA ODABRANIH PROIZVODA (2007. – 2009.) PRODUCTION OF SELECTED PRODUCTS (2007 – 2009)

| | Jedinica mjere Unit of measurement | 2007. | 2008. | 2009. |
|-----------------------------------|---------------------------------------|--------|--------|--------|
| Žitarice ukupno / Cereals total | tis. tona / thousand tonnes | 2.534 | 3.726 | 3.442 |
| Pšenica / Wheat | tis. tona / thousand tonnes | 812 | 858 | 936 |
| Kukuruz / Corn | tis. tona / thousand tonnes | 1.425 | 2.505 | 2.183 |
| Šećerna repa / Sugarbeet | tis. tona / thousand tonnes | 1.583 | 1.270 | 1.217 |
| Uljarice ukupno / Oil crops total | tis. tona / thousand tonnes | 187 | 292 | 281 |
| Krumpir / Potato | tis. tona / thousand tonnes | 296 | 256 | 270 |
| Jabuke / Apples | tis. tona / thousand tonnes | 80 | 80 | 93 |
| Šljive / Plums | tis. tona / thousand tonnes | 64 | 49 | 38 |
| Grožđe / Grapes | tis. tona / thousand tonnes | 198 | 185 | 206 |
| Masline / Olives | tis. tona / thousand tonnes | 35 | 36 | 33 |
| Južno voće / Mediterranean fruits | tis. tona / thousand tonnes | 46 | 53 | 41 |
| Goveda / Cattle | tis. grla / thousand heads | 467 | 454 | 447 |
| Svinje / Pigs | tis. grla / thousand heads | 1.348 | 1.104 | 1.250 |
| Perad / Poultry | tis. grla / thousand heads | 10.053 | 10.015 | 10.787 |
| Mlijeko / Milk | mil. litara / million litars | 856 | 823 | 814 |
| Jaja / Eggs | mil. komada / milion pieces | 804 | 787 | 805 |

Izvor: Državni zavod za statistiku

Source: Central Bureau of Statistics (CBS)

IZVOZ - UVOZ

Hrvatska najviše izvozi u susjedne zemlje, posebice u Bosnu i Hercegovinu, Italiju, Sloveniju i Srbiju, a značajni izvozni poljoprivredni proizvodi su žitarice, sjemenska roba, mandarine, duhan, ljekovito bilje i med. Osim južnog voća i kave, u Hrvatsku se uvoze znatnije količine živih svinja, goveda, kakaa te uljarica.

EXPORT - IMPORT

Croatia exports mainly to neighbouring countries, especially Bosnia and Herzegovina, Italy, Slovenia and Serbia. Major agricultural products are cereals, seeds, tangerines, tobacco, medicinal herbs and honey. In addition to tropical and Mediterranean fruits and coffee, Croatia imports significant amounts of live pigs, cattle, cocoa and oil crops.

IZVOZ I UVOZ POLJOPRIVREDNIH PROIZVODA EXPORT AND IMPORT OF AGRICULTURAL PRODUCTS

| | 2005. | 2006. | 2007. | 2008. | 2009. |
|---|-------|-------|-------|-------|-------|
| Izvoz (mil. USD) / Exports (million \$) | 59 | 100 | 209 | 179 | 251 |
| Uvoz (mil. USD) / Imports (million \$) | 455 | 483 | 569 | 700 | 551 |

Izvor: DZS;
Source: CBS

Obrada: HGK Sektor za poljoprivredu, prehrambenu industriju i šumarstvo
Compiled by: CCE Agriculture, Food Industry and Forestry Department

INDUSTRIJA HRANE, PIĆA I DUHANA

Industrija hrane i pića u bruto dodanoj vrijednosti hrvatske prerađivačke industrije sudjeluje sa 21 posto, a proizvodnja duhanskih proizvoda sa 2,5 posto. U industriji hrane, pića i duhana registrirano je više od 1200 tvrtki, a zaposleno oko 47.000 djelatnika ili približno 20 posto ukupno zaposlenih u prerađivačkoj industriji. Proizvodnja hrane, pića i duhana djelatnosti su koje, u usporedbi s drugim granama prerađivačke industrije u Hrvatskoj, zapošljavaju najviše ljudi i ostvaruju najveći ukupni prihod.

FOOD, BEVERAGES AND TOBACCO INDUSTRY

The manufacture of food and beverages comprises 21% of the gross value added in Croatian manufacturing industry, whilst tobacco production accounts for 2.5%. The food, beverages and tobacco industry contains over 1,200 companies, which employ some 47,000 persons, that is, about 20% of the total number of employees in manufacturing industry. Within the whole Croatian processing industry, this segment generates the largest total income and provides the highest number of workplaces.

INDUSTRIJSKA PROIZVODNJA ODABRANIH PROIZVODA THE INDUSTRIAL PRODUCTION OF SELECTED PRODUCTS

| | 2007. | 2007. | 2009. |
|---|--------|--------|--------|
| Govedina, svježa ili hladena (tis. tona) / Meat of bovine animals, fresh or chilled (thous. tonnes) | 25 | 25 | 25 |
| Svinjetina, svježa ili hladena (tis. tona) / Meat of swine, fresh or chilled (thous. tonnes) | 51 | 53 | 51 |
| Svježe meso peradi (tis. tona) / Meat of poultry, fresh or chilled (thous. tonnes) | 54 | 53 | 49 |
| Kobasice (tis. tona) / Sausage (thous. tonnes) | 53 | 54 | 56 |
| Mesne konzerve (tis. tona) / Canned meat (thous. tonnes) | 20 | 21 | 16 |
| Riblje konzerve (tis. tona) / Canned fish (thous. tonnes) | 10 | 10 | 10 |
| Voćni sokovi (tis. hl) / Fruit juices (thous. hl) | 841 | 1.050 | 851 |
| Konzervirano povrće (tis. tona) / Canned vegetables (thous. tonnes) | 13 | 9 | 11 |
| Konzervirano povrće u octu (tis. tona) / Vegetables preserved in vinegar (thous. tonnes) | 11 | 12 | 13 |
| Jestivo ulje (tis. tona) / Edible oil (thous. tonnes) | 48 | 53 | 49 |
| Margarin (tis. tona) / Margarine (thous. tonnes) | 16 | 17 | 17 |
| Maslac (tis. tona) / Butter (thous. tonnes) | 4 | 4 | 5 |
| Sirevi (tis. tona) / Cheese (thous. tonnes) | 27 | 28 | 29 |
| Pšenično brašno (tis. tona) / Wheat flour (thous. tonnes) | 324 | 348 | 321 |
| Svježi kruh (tis. tona) / Fresh bread (thous. tonnes) | 127 | 128 | 135 |
| Tjestenina (tis. tona) / Pasta (thous. tonnes) | 10 | 11 | 13 |
| Keksi i srodni proizvodi (tis. tona) / Biscuits and related products (thous. tonnes) | 29 | 27 | 30 |
| Bomboni, slatkiši i kakao proizvodi (tis. tona) / Candy, sweet and cocoa products (thous. tonnes) | 27 | 27 | 27 |
| Šećer (tis. tona) / Sugar (thous. tonnes) | 300 | 298 | 255 |
| Dodaci jelima - umaci, pripravci umaka i začini (tis. tona) / Condiments (thous. tonnes) | 23 | 24 | 23 |
| Koncentrirane juhe (tis. tona) / Concentrated soups (thous. tonnes) | 7 | 7 | 6 |
| Dječja hrana (tis. tona) / Baby food (thous. tonnes) | 6 | 8 | 8 |
| Pekarski kvasac (tis. tona) / (thous. tonnes) | 12 | 12 | 12 |
| Stočna hrana (tis. tona) / Livestock feed (thous. tonnes) | 616 | 626 | 591 |
| Osvježavajuća bezalkoholna pića (tis. hl) / Soft drinks (thous. hl) | 2.570 | 2.548 | 2.586 |
| Destilirana alkoholna pića (tis. hl) / Spirits (thous. hl) | 139 | 138 | 128 |
| Pivo (tis. hl) / Beer (thous. hl) | 3.696 | 3.887 | 3.673 |
| Vino (tis. hl) / Wine (thous. hl) | 491 | 381 | 404 |
| Cigarete koje sadrže duhan (mil. kom.) / Nicotine-containing cigarettes (million pieces) | 14.526 | 15.586 | 11.382 |

Izvor: DZS;

Source: CBS

Obrada: HGK - Sektor za poljoprivredu, prehrambenu industriju i šumarstvo;

Compiled by: CCE – Agriculture, Food Industry and Forestry Department

PROIZVODNJA

Proizvodnja hrane i pića važna je djelatnost za svaku državu. U RH najprofitabilnije djelatnosti u tom sektoru su proizvodnja cigareta i prerada duhana, prerada ribe, proizvodnja piva, prerada mljeka, prerada čaja i kave te proizvodnja bezalkoholnih pića. To su ujedno djelatnosti

PRODUCTION

Food and drinks production is an important field of economy in all countries. The most profitable within those sectors in Croatia are the cigarette production and tobacco processing, fish processing, beer production, processing of milk, tea and coffee and the production of soft drinks. At

koje su privukle većinu stranih ulaganja i u kojima djeluju iznimno uspješne tvrtke.

Najznačajnije tvrtke u industriji hrane, pića i duhana u RH su:

VINDIJA d.d., Varaždin, www.vindija.hr,
 PODRAVKA d.d., Koprivnica, www.podravka.com,
 TVORNICA DUHANA ROVINJ d.d., Rovinj, www.tdr.hr,
 DUKAT d.d., Zagreb, www.ukat.hr,
 PIK VRBOVEC – MESNA INDUSTRIJA d.d., Vrbovec,
www.pik-vrbovec.hr,
 LEDO d.d., Zagreb, www.ledo.hr,
 JAMNICA d.d., Zagreb, www.jamnica.hr,
 COCA-COLA BEVERAGES HRVATSKA d.d., Zagreb,
www.coca-colahbc.hr,
 ZVIJEZDA d.d., Zagreb, www.zvijezda.hr,
 MESNA INDUSTRIJA BRAĆA PIVAC d.o.o., Vrgorac,
www.pivac.hr

the same time, these branches have attracted the bulk of foreign investments, and some exceptionally successful companies operate within them.

The most important food, beverages and tobacco industry companies in Republic of Croatia are:

VINDIJA d.d., Varaždin, www.vindija.hr
 PODRAVKA d.d., Koprivnica, www.podravka.com
 TVORNICA DUHANA ROVINJ d.d., Rovinj, www.tdr.hr
 DUKAT d.d., Zagreb, www.ukat.hr
 PIK VRBOVEC – MESNA INDUSTRIJA d.d., Vrbovec,
www.pik-vrbovec.hr
 LEDO d.d., Zagreb, www.ledo.hr
 JAMNICA d.d., Zagreb, www.jamnica.hr
 COCA-COLA BEVERAGES HRVATSKA d.d., Zagreb,
www.coca-colahbc.hr ,
 ZVIJEZDA d.d. , Zagreb, www.zvijezda.hr,
 MESNA INDUSTRIJA BRAĆA PIVAC d.o.o., Vrgorac,
www.pivac.hr

IZVOZ - UVOZ

Prehrambeni proizvodi u ukupnom izvozu poljoprivrednih i prehrambenih proizvoda čine 74 posto. Značajni su izvozni proizvodi industrije hrane, pića i duhana: šećer, cigarete, Vegeta (dodatak jelima), pivo, proizvodi za dječju hranu, soljeni inćuni i drugo, a najviše se uvoze uljane pogače, cigarete, šećer, mineralne vode, zamrznuta svinjetina i drugo.

Najvažnija su izvozna odredišta poljoprivrednih i prehrambenih proizvoda tržišta susjednih zemalja: Bosna i Her-

IZVOZ I UVOZ PROIZVODA INDUSTRIJE HRANE, PIĆA I DUHANA EXPORT-IMPORT OF THE PRODUCTS OF FOOD, BEVERAGES AND TOBACCO INDUSTRY

| | 2005. | 2006. | 2007. | 2008. | 2009. |
|---|-------|-------|-------|-------|-------|
| Izvoz (mil. USD) Export (million \$) | 809 | 985 | 1.013 | 1.123 | 1.009 |
| Uvoz (mil. USD) Import (million \$) | 1.138 | 1.341 | 1.549 | 1.894 | 1.672 |

Izvor: DZS; Source: CBS
 Obrada: HGK Sektor za poljoprivredu, prehrambenu industriju i šumarstvo
 Compiled by: CCE – Agriculture, Food Industry and Forestry Department

EXPORT - IMPORT

Food products account for 74% of total Croatian exports of agricultural and food products. Important export products are food, beverages, tobacco: sugar, cigarettes, Vegeta (seasoning), baby food products, salted anchovies, beer, etc. Major import of food products includes oil cakes, cigarettes, sugar, mineral water, frozen pork, etc.

The most important export destinations are neighbouring countries: Bosnia and Herzegovina, Italy, Slovenia and Serbia, while the majority of

IZVOZNI PROIZVOD (NAJZNAČAJNIJA IZVOZNA TRŽIŠTA) EXPORT PRODUCT (MOST IMPORTANT EXPORT MARKETS)

| | IZVOZ 2009. EXPORT 2009 | Udio % Share % |
|--|----------------------------|-------------------|
| Ukupno izvoz poljoprivrednih i prehrambenih proizvoda / Total exported agricultural and food products | 1.360.067 | 100 |
| 1. RAFINIRANI ŠEĆER (Slovenija, Rumunjska, Mađarska,...) / REFINED SUGAR (Slovenia, Romania, Hungary...) | 122.536 | 9 |
| 2. CIGARE, CIGARILOSI I CIGARETE OD DUHANA (BiH, Srbija, Njemačka...) / CIGAR, CIGARILLOS AND CIGARETTES OF TOBACCO (Bosnia and Herzegovina, Serbia, Germany...) | 88.485 | 7 |
| 3. TUNE (smrznute, rashlađene) (Japan, Turska...) / TUNA (frozen, chilled) (Japan, Turkey...) | 60.184 | 4 |
| 4. ČOKOLADE (punjene i nepunjene) (BiH, Srbija, Slovenija, Makedonija...) / CHOCOLATE (filled and solid) (Bosnia and Herzegovina, Serbia, Slovenia, Macedonia...) | 52.951 | 4 |
| 5. VEGETA (dodatak jelima) (Rusija, Njemačka, BiH, SAD...) / VEGETA (seasoning) (Russia, Germany, Bosnia and Herzegovina, USA...) | 43.303 | 3 |
| 6. PIVO (BiH, Mađarska, Srbija, Švedska...) / BEER (Bosnia and Herzegovina, Hungary, Serbia, Sweden...) | 40.566 | 3 |
| 7. KEKSI (slatki), VAFLI, OBLATE (BiH, Slovenija, Saudijska Arabija, SAD...) / BISCUITS (sweet), WAFERS, WAFER SHEETS (Bosnia and Herzegovina, Slovenia, Saudi Arabia, USA...) | 35.310 | 3 |
| 8. RIBLJE KONZERVE (Srbija, BiH, Slovenija, Crna Gora, Makedonija...) / CANNED FISH (Serbia, Bosnia and Herzegovina, Slovenia, Montenegro, Macedonia...) | 28.085 | 2 |
| 9. JUHE (pripravci) (BiH, Srbija, Rusija, Makedonija...) / SOUPS (preparations) (Bosnia and Herzegovina, Serbia, Russia, Macedonia...) | 22.451 | 2 |
| 10. VINA (BiH, Njemačka, Srbija, Austrija...) / WINE (Bosnia and Herzegovina, Germany, Serbia, Austria...) | 12.611 | 1 |
| Ukupno prikazano / Total for products shown above | 506.482 | 37 |

Izvor: DZS; Obrada: HGK Sektor za poljoprivredu, prehrambenu industriju i šumarstvo
 Source: CBS; Compiled by: CCE – Agriculture, Food Industry and Forestry Department

cegovina, Italija, Slovenija i Srbija, dok se najviše uvoze proizvodi podrijetlom iz Njemačke, Italije, Nizozemske, Brazila i Mađarske.

Hrvatska može svjetskom tržištu ponuditi prepoznatljive proizvode visoke kvalitete i izvornosti. Trenutačno je u Hrvatskoj šest prehrambenih proizvoda koji nose oznaku izvornosti ili geografskog podrijetla: istarski i drniški pršut, cetinski sir, paški sir, slavonski kulen i paška sol.

Hrvatska gospodarska komora većinu je prava korištenja znakova kvalitete i izvornosti dodijelila upravo prehrambenim proizvodima. Popis proizvoda nositelja znakova Hrvatska kvaliteta i Izvorno hrvatsko nalaze se na web-stranicama HGK.

● STRUKOVNO UDRUŽIVANJE U HGK

Sektor za poljoprivredu, prehrambenu industriju i šumarstvo organiziran je od 1994. godine u udruženja, vijeća i grupacije. Ti oblici organiziranja čine temelj svih aktivnosti Sektora. Osnovana su četiri udruženja: Udruženje poljoprivrede i prateće industrije, Udruženje stočarstva i prateće industrije, Udruženje ribarstva i prerade ribe i Udruženje drvno-prerađivačke industrije. Unutar navedenih udruženja osnovano je 18 grupacija.

Osim Sektora za poljoprivredu, prehrambenu industriju i šumarstvo u Središnjici HGK, tim se djelatnostima bave i odjeli za poljoprivredu i prehrambenu industriju 20 županijskih komora.

Udruženje poljoprivrede i prateće industrije

1. Grupacija prerade uljarica
2. Grupacija proizvodnje i prerade šećerne repe
3. Grupacija proizvodnje i prerade voća i povrća
4. Grupacija proizvodnje i prerade grožđa i vina
5. Grupacija proizvodnje piva i slada
6. Grupacija proizvodnje i prerade ljekovitog i aromatičnog bilja

Udruženje stočarstva i prateće industrije

1. Grupacija pčelarstva
2. Grupacija industrije stočne hrane

Udruženje ribarstva i prerade ribe

1. Grupacija ribolova
2. Grupacija akvakulture
3. Grupacija prerada ribe

Udruženje drvno-prerađivačke industrije

1. Grupacija primarne prerade
 2. Grupacija proizvođača namještaja
 3. Grupacija proizvođača furnira
 4. Grupacija "Drvo u graditeljstvu"
 5. Grupacija malih i srednjih drvoprerađivača
 6. Grupacija trgovaca drvom
 7. Grupacija trgovaca namještajem
- Odbor za marketing, sajmove i međunarodna udruženja
 - Odbor za biomasu, ekologiju i zaštitu okoliša
 - Odbor za certificiranje i kvalitetu
 - Odbor za repromaterijale i razvoj novih proizvoda
 - Odbor za nove tehnologije
 - Odbor za klastere i kooperacije
 - Odbor proizvođača pogrebne opreme

imported products come from Germany, Italy, the Netherlands, Brazil, Hungary and the Netherlands.

Croatia can offer to the world market some distinctive and original high quality products. There are currently six food products bearing labels which testify to their genuine and original characteristics or geographical origin: prosciutto from Istria and Drniš, Cetina cheese, cheese from the island of Pag, Slavonian salami kulen and salt from the island of Pag. It is to food products that the Croatian Chamber of Economy has given the majority of the quality and originality labels. The products holding the Croatian Quality and Croatian Creation labels may be found on the website of the Croatian Chamber of Economy.

● PROFESSIONAL ASSOCIATION AT THE CROATIAN CHAMBER OF ECONOMY

Since 1994, the Agriculture, Food Industry and Forestry Department has been organised in associations, councils and groups. These organisational forms constitute the basis for all departmental activities. Four associations have been created: Agriculture and Related Industries Association, the Livestock Raising and Related Industries Association, Fish and Fish Processing Industry Association and Wood and Wood-processing Industry Association, accompanied by 18 groups.

However, not only the Agriculture, Food Industry and Forestry Department at the CCE Headquarters deals with these matters, but also the departments for agriculture and the food industry of the 20 county chambers.

Agriculture and Related Industries Association

1. Oil Crop Producers and Processors Group
2. Sugar Beet Producers and Processors Group
3. Fruit and Vegetable Producers and Processors Group
4. Grape and Wine Producers and Processors Group
5. Beer and Malt Producers Group
6. Medicinal and Aromatic Herbs Production and Processing Group

Livestock Raising and Related Industries Association

1. Beekeeping Group
2. Animal Feed Industry Group

Fishery and Fish Processing Association

1. Aquaculture Group
2. Fishing Group
3. Fish Processing Group

Wood and Wood-processing Industry Association

1. Primary Wood Processing Group
 2. Furniture Producers Group
 3. Veneer Producers Group
 4. "Wood in Construction" Group
 5. Small and Medium-Sized Wood Processing Industry Group
 6. Wood trade Group
 7. Furniture trade Group
- Committee for Marketing, Fairs and International Associations
 - Committee for Biomass, Ecology and Environmental Protection
 - Committee for Certification and Quality
 - Committee for Production Materials and Development of New Products
 - Committee for New Technologies
 - Clusters and cooperation Committee
 - Funeral equipment producer Committee



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