

HRVATSKA GOSPODARSKA KOMORA

SEKTOR ZA POLJOPRIVREDU, PREHRAMBENU INDUSTRIJU I ŠUMARSTVO

CROATIAN CHAMBER OF ECONOMY

AGRICULTURE, FOOD INDUSTRY AND FORESTRY DEPARTMENT



RIBARSTVO I PRERADA RIBE

● UVOD

Morsko ribarstvo je, uz pomorstvo, tradicionalno najvažnija djelatnost hrvatskog priobalja i otoka, što dokazuje preko tisuću godina stara prva pisana isprava o morskom ribarstvu.

I danas su ulov, uzgoj i prerada ribe važan izvor egzistencije stanovništva toga kraja. Tradicionalna kvaliteta proizvoda Jadranskog mora, kao i proizvoda slatkovodnog ribarstva postaje sve prepoznatljivija na europskom i svjetskom tržištu, čineći tradicionalne proizvode ribarstva proizvodima budućnosti.

ULOV MORSKE RIBE

Jadransko more razmjerno je siromašno količinom ribe, ali je zato bogato vrstama koje ga nastanjuju. U gospodarskim ulovima javlja se više od 50 značajnijih vrsta. Godine 2008. ostvaren je ulov od 49.000 tona morske ribe i drugih morskih organizama. U strukturi ulova ribe prevladava sitna plava riba (90 posto), a njeni su najveći potrošači tvornice za preradu ribe i uzgajališta tuna. Tradicionalno se na domaćem tržištu najviše konzumira mala plava riba, no posljednjih godina raste potražnja za bijelom ribom.

FISHERY AND FISH PROCESSING

● INTRODUCTION

In addition to maritime activities, sea fishing is traditionally the most important activity on the Croatian coast and islands, which is proved by the first document on sea fishing over a thousand years old.

Even today, fishing and fish breeding and processing features strongly in providing sustenance for the local population. Traditional high-quality products from the Adriatic Sea, as well as products from freshwaters have become well-recognized on European and world markets, turning traditional fishing products into the products of future.

MARINE FISH CATCH

The Adriatic Sea is comparatively thinly populated with fish. However, there is a great diversity of species. In professional fishing over 50 significant fish species can be found. In 2008 the catch of marine fish and other marine organisms amounted to more than 49,000 tones. The catch of small pelagic fish predominates (90%), primarily for the needs of fish-processing plants and tuna farms. Small pelagic fish is the most consumed on national market, however, the demand for white fish has been increasing over the last few years.

		2007.	2008.	2009.
ULOV MORSKE RIBE MARINE FISH CATCH				
ULOV MORSKE RIBE – UKUPNO MARINE FISH CATCH - TOTAL	tone tonnes	37.934	47.519	53.596
Ulov plave ribe: Small pelagic fish catch:	tone tonnes	33.041	42.688	49.459
od toga: / out of which:				
Srdela Pilchard	tone tonnes	16.900	21.194	28.815
Inćun Anchovies	tone tonnes	13.200	13.054	13.835
Ulov bijele ribe White demersal fish catch	tone tonnes	4.893	4.831	4.137
od toga: / out of which:				
Osljić Hake	tone tonnes	980	702	840
Izvor: DZS / Source: CBS				

AKVAKULTURA

U Hrvatskoj akvakultura odnosno uzgoj ribe i školjaka ima velike potencijale. U kopnenom se dijelu uzgoj slatkovodne ribe razvija više od 120 godina, a uzgoj morske ribe posljednjih četrdesetak godina.

Od mogućih 12 tisuća hektara, na šaranskim se ribnjacima riba uzgaja na oko 7,6 tisuće hektara, a pastrva na 58 tisuća četvornih metara. Šaranski ribnjaci, osim uzgoja, imaju veliku važnost u očuvanju posljednjih staništa ugroženih i zaštićenih ptica močvarica. Uz šarana i pastrvu, značajne vrste u uzgoju slatkovodne ribe su amur, som, bijeli i sivi glavaš te linjak i smuđ. Nedavno je započet i uzgoj jegulje.

Uzgoj morske ribe sve više dobiva na značenju. Uz povećanje potrošnje teži se povećanju proizvodnje ribe, diverzifikaciji proizvodnje te povećanju kvalitete uzgojene ribe uz postizanje najviših ekoloških standarda u očuvanju okoliša.

U uzgoju bijele morske ribe prevladavaju lubin i orada, a kod školjaka najveći se dio odnosi na dagnje. Uzgoj kamenica, iako ekonomski iznimno vrijedan, još je neznatan. Prije desetak godina unutar hrvatske marikulture intenziviran je kavezni uzgoj tune namjenjen japanskom tržištu, a tuna je postala jedan od najznačajnijih izvoznih proizvoda poljoprivredno-prehrambenog sektora u Hrvatskoj.

AQUACULTURE

Aquaculture, that is, fish and shellfish farming, has a very big potential in Croatia. In inland Croatia, fresh-water fish farming has a tradition older than 120 years, and marine fish farming has developed over the last four decades.

Fresh-water fish is bred in about 7,600 hectares of carp ponds out of total 12,000 hectares and also in about 58,000 square meters of trout ponds. Besides farming, carp ponds are very important in preserving the remaining habitats of endangered and protected wading birds.

In addition to carp and trout, other significant farmed freshwater fish include grass carp, catfish, big head and silver carp, pikeperch and tench, and recently eel.

Marine fish farming is gaining importance. As consumption is increasing, efforts are being put into increasing the production of cultivated fish, diversification of production and also in achieving the highest standards in environmental protection.

With regard to the cultivation of marine fish, sea bass and sea bream are predominant. Mussels account for most of shellfish production, whereas oysters still play a marginal role.

Some ten years ago, Croatian mariculture intensified cage farming of tuna fish intended for the Japanese market. This has made tuna one of the leading exports of the Croatian food industry and agriculture.

UZGOJ SLATKOVODNE I MORSKE RIBE TE ŠKOLJAKA THE BREEDING OF SEA-FISH, FRESH-WATER FISH AND SHELLFISH		2007.	2008.	2009.
Konzumni šaran Carp	tone tonnes	1.503	1.546	2.058
Pastrva Trout	tone tonnes	2.031	2.058	2.024
Lubin i komarča Sea-bass & Sea bream	tone tonnes	3.950	4.500	5.000
Tuna Tuna	tone tonnes	4.180	3.711	4.200
Dagnje i kamenice** Mussels and Oysters**	tone tonnes	3.500	3.000	2.100
Izvor: DZS / Source: CBS				
** podaci se odnose na jestivu i nejestivu težinu ulova / figures for edible and inedible catch				

INDUSTRIJA PRERADE RIBE

Riboprerađivačka industrija u Hrvatskoj ima tradiciju dulju od 130 godina i jedna je od prvih industrija na prostorima hrvatskoga priobalja i otoka. Danas se proizvodnjom ribljih prerađevina bavi više od 60 tvrtki. Godišnje se ukupno proizvede preko 16 tisuća tona ribljih prerađevina. U industrijskoj preradi ribe količinski još dominira konzervirana riba. Međutim, zbog promjene u prehranbenim navikama i zahtjeva domaćeg i stranih tržišta, znatan porast u proizvodnji ribljih proizvoda bilježi se kod proizvodnje soljenih inćuna, zamrznute ribe, dimljene ribe (dimljeni lubini, jegulje te slatkodvodna riba) i riblje marinade itd. Ovdje posebno valja istaknuti proizvodnju soljene ribe čija se proizvodnja u posljednjem desetljeću povećala nekoliko puta. Dorada i konfekcioniranje morske i slatkodvodne ribe te drugih morskih organizama djelatnost je koja se razvija posljednjih dvadeset godina.

IZVOZ I UVOZ RIBE I PRERAĐEVINA

Jedna je od značajki našeg ribarstva usmjerenost na izvozna tržišta, čime se već godinama ostvaruje suficit u vanjskotrgovinskoj razmjeni. U ukupnom izvozu svježe i zamrznute ribe 2009. godine 65 posto čini tuna. Trgovinsku razmjenu u ribarstvu karakterizira uvoz veće količine ribe manje tržišne vrijednosti, a izvoz čine visokovrijedni proizvodi. Najvažnija izvozna tržišta ribljih konzervi su Srbija, BiH, Slovenija, Crna Gora, te Makedonija, a soljene ribe Italija i Španjolska. Bijela riba iz uzgoja izvozi se uglavnom u Italiju a uzgojena tuna gotovo se potpuno izvozi u Japan.

FISH PROCESSING INDUSTRY

The fish processing industry in Croatia with its 130 year old tradition is one of the prime industries in the Croatian coastal area and islands. There are more than 60 fish processing businesses today in Croatia. Over 16,000 tones of processed fish products are produced annually. In this sector, canned fish is still quantitative dominant. At the same time, due to the changes of nutritional habits and demands of the foreign and local market, a significant increase in production of fish products has been noted, mostly salted anchovies, frozen fish, smoked fish (smoked sea bass, eels and freshwater fish) fish pâté and marinated fish, etc. Here, the production of salted fish needs to be especially pointed out, since its production increased several times in the past decade. The processing and packaging of marine and fresh-water fish as well as of other marine organisms is a relatively new activity which has significantly developed in the past twenty years.

EXPORT AND IMPORT OF FISH AND FISH PRODUCTS

The Croatian fishing industry is oriented towards export markets, which has resulted in a foreign trade surplus for several years now. The export of tuna fish accounted for more than 65% of total fresh and frozen fish exports in 2009. Trade exchange is marked by import of higher fish quantities having lower market value and by export of high-value products.

The most important markets for canned fish are Serbia, Bosnia and Herzegovina, Montenegro, Slovenia and Macedonia, and Italy and Spain for salted fish. Farmed white-fish is mainly exported to Italy, while virtually all farmed tuna is exported to Japan.

IZVOZ RIBE I PRERAĐEVINA EXPORT OF FISH AND FISH PRODUCTS

tone / tons

	2006.	2007.	2008.	2009.
Žive ribe / Live fish	1.218	1.102	439	719
Ribe svježe ili rashlađene / Fresh or refrigerated fish	13.181	12.545	12.660	13.040
Riba smrznuta / Frozen fish	1.880	2.606	2.362	3.216
Ribljí fileti / Fish fillets	41	43	81	105
Riba sušena, soljena, dimljena / Dried, salted, smoked fish	7.297	7.387	6.726	8.336
Ljuskavci, mekušci / Crustaceans, molluscs	1.656	1.583	1.786	1.749
Konzervirana riba / Canned fish	4.179	5.288	5.299	5.485

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

UVOZ RIBE I PRERAĐEVINA		IMPORT OF FISH AND FISH PRODUCTS			tone / tons
	2006.	2007.	2008.	2009.	
Žive ribe / Live fish	1.601	1.199	817	97	
Ribe svježe ili rashladene / Fresh or chilled fish	606	806	1.075	929	
Riba smrznuta / Frozen fish	31.764	37.419	31.845	25.506	
Riblji fileti / Fish fillets	3.180	2.231	3.309	2.500	
Riba sušena, soljena, dimljena / Dried, salted, smoked fish	331	431	1.054	860	
Ljuskavci, mekušci / Crustaceans, molluscs	7.873	9.437	9.726	8.941	
Konzervirana riba / Canned fish	5.930	5.551	5.533	4.754	

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

● 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 te Udruženje drveno-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 prerade ribe

● PROFESSIONAL ASSOCIATION AT THE CROATIAN CHAMBER OF ECONOMY

Since 1994, the Agriculture, Food Industry and Forestry Department has been organized in associations, councils and groups. These organizational forms constitute the basis for all departmental activities. Four associations have been founded: 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 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

Udruženje drvno-prerađivačke industrije

1. Grupacija primarne prerade
 2. Grupacija proizvođača namještaja
 3. Grupacija proizvođača furnira
 4. Grupacija "Drvo u graditeljstvu"
 5. Grupacija mali i srednji drvoprerađivači
 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

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 traders Group
 7. Furniture traders 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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