



## PRERADA KOŽE, IZRADA GALANTERIJE I OBUĆE

Kožarsko-prerađivačka djelatnost Hrvatske ima dugu proizvodnu tradiciju i u svijetu kožarstva i obućarstva priznata je kao tradicionalno kvalitetni proizvođač. Tu tvrdnju potkrepljuje i činjenica da smo u susjedstvu zahtjevnog tržišta zemalja EU – našeg najvećeg kupca.

U ukupnom prihodu prerađivačke industrije RH u 2009. godini prerada kože sudjelovala je sa 1,51 posto.

### ● PROIZVODNJA

Proizvodnja kože i proizvoda od kože dio je prerađivačke industrije koja proizvodnim i izvoznim rezultatima zauzima značajno mjesto u hrvatskom gospodarstvu. Od ukupnog broja registriranih tvrtki u toj djelatnosti (124 u 2009. godini), proizvodnja obuće najveća je grupacija kožarsko-prerađivačke djelatnosti po svim pokazateljima: od broja tvrtki i zaposlenih do ukupno ostvarene proizvodnje. Posljednjih se godina, unatoč konkurenciji Dalekog istoka, otvaraju novi pogoni koji proizvode gotovu obuću i dijelove za obuću, što je novo u transformaciji ove proizvodne grane.

Tvrtke su, naime, prepoznale svjetske trendove u toj djelatnosti te prestrukturiranjem svoje proizvodnje u višu cjenovnu i kvalitetnu klasu nastoje iskoristiti prednosti koje im pruža blizina zahtjevnog europskog tržišta, i to jačanjem konkurentnosti, prije svega:

- vlastitim brendiranim proizvodima,
- specijalizacijom i fleksibilnošću te kooperacijom unutar grane i s inozemnim partnerima.

Ujedinjena Europa traži sve više specijaliziranu obuću primjerenu sportsko-turističkim i rekreativnim potrebama (viša kvaliteta, dizajn, brzina isporuke itd.), što je, zbog blizine i brže isporuke, prednost za naše proizvo-

## LEATHER PROCESSING, MANUFACTURE OF LEATHERWEAR AND FOOTWEAR

Leather processing and the manufacture of leather goods has a long tradition in Croatia and Croatian companies have been internationally recognised in this branch as manufacturers of high quality leather products. This statement is certainly corroborated by the fact that we are the neighbours of the extremely demanding EU's market whose member countries are our best buyers.

Leather processing accounted for 1.51 % of the total turnover of the manufacturing industry in Croatia in 2009.

### ● PRODUCTION

The manufacturing sector, of which the manufacture of leather and leather products is a part, plays a substantial role in the overall Croatian economy. Looking at the total number of companies registered in the leather industry as a whole (124 in 2009), the manufacture of footwear is the largest group in the leather manufacturing and processing sector by any indicator, be it by the number of companies and employees or by total output. Despite competition from the Far East, a number of new, smaller companies that manufacture footwear and footwear parts have been established over the past few years.

This gives a new dimension to the transformation under way in this manufacturing sector.

The companies, namely, recognised the international tendencies in this branch and, by restructuring their production into higher price and quality class, try to use the advantages of the vicinity of a demanding EU's market and strengthen their competitiveness primarily through:

- our own brands,
- specialisation and flexibility and co-operation within the branch and with international business partners.

EU's market is in great demand for specialised sports and recreational footwear (high quality, modern design, rapid

daće. Ohrabruje činjenica da su vrsni domaći proizvođači spremni uhvatiti se u koštac s ozbiljnom konkurencijom i vlastitim kvalitetnim proizvodom zauzeti svoje mjesto na tržištu, što je i jedina garancija opstanka ove djelatnosti.

Budući da ova industrijska djelatnost radi na vrlo nesigurnom tržištu, podložnom stalnom utjecaju mode i kratkom životnom ciklusu proizvoda, strategija njena daljnjeg razvitka jest u prelasku s doradnih i uslužnih poslova za inozemne partnere na cjelovite poslove i vlastite kolekcije s prepoznatljivim markama te što veću konkurentnost na vanjskom i domaćem tržištu.

Posebice valja naglasiti da kroz male privatne tvrtke oživljava proizvodnja kožne konfekcije i galanterijskih proizvoda uglavnom po narudžbi za poznate kupce. Radi se na razvoju i prepoznatljivosti vlastitog modnog brenda s ciljem da postane i međunarodno prepoznatljiv.

delivery, etc.) which, due to the vicinity of the market and prompt delivery, undoubtedly presents one of greatest advantages for our manufacturers. It is encouraging that top local producers are ready to tackle serious competition and to take their place on the market with their own products, which is the only guarantee for survival of this branch.

As this industrial sector operates in a very inconstant market susceptible to ever-changing fashion trends, which also accounts for a short product life-cycle, the strategy for its further development envisages switching from current job of processing and service provision for foreign partners to complete manufacturing cycles and own distinctive brand collections while taking the challenge of achieving maximum competitiveness in both international and domestic markets.

It should also be noted that smaller, privately owned companies are now revitalising the manufacture of ready-to-wear leather apparel and leatherwear, chiefly to the specifications of a known customer. We are working on development of our own brands with the goal to make them internationally recognisable.

## INDEKSI FIZIČKOG OBUJMA INDUSTRIJSKE PROIZVODNJE PO PODRUČJIMA I ODJELJICIMA NKD-a 2007.

### INDICES OF PHYSICAL VOLUME RELATING TO INDUSTRIAL PRODUCTION IN THE REPUBLIC OF CROATIA ACCORDING TO NCEA 2007

ŠIFRA I NAZIV PODRUČJA, POTPODRUČJA, ODJELJKA, SKUPINE I RAZREDA NKD-a NAME AND CODE OF THE AREA, SUBAREA, SUBSECTION AND CATEGORY ACCORDING TO THE NATIONAL BUSINESS CLASSIFICATION	2005 = 100			
	2006.	2007.	2008.	2009.
C 15 Proizvodnja kože i srodnih proizvoda Manufacture of leather and leather products	129,8	156,1	163,0	128,8

Izvor: DZS, obrada: HGK

Source: States Bureau of Statistics, Processed by: CCE

### Indeksi industrijske proizvodnje Industrial production indices

	2006	2007	2008	2009
	2005	2006	2007	2008
C 15 Proizvodnja kože i srodnih proizvoda Manufacture of leather and related products	129,8	120,3	104,4	79,0
C 151 Štavljenje i obrada kože, proizvodnja kovčega i ručnih torbi Tanning and leather processing; manufacture of suitcases and handbags				72,7
C 1511 Štavljenje i obrada kože Tanning and leather processing; manufacture of suitcases				119,7
C 1512 Proizvodnja putnih i ručnih torbi, i sl. Manufacture of suitcases and bags, handbags and other products				70,8
C 1520 Proizvodnja obuće Manufacture of footwear				91,3

Izvor: DZS, obrada: HGK

Source: States Bureau of Statistics, Processed by: CCE

## ZAPOSLENOST

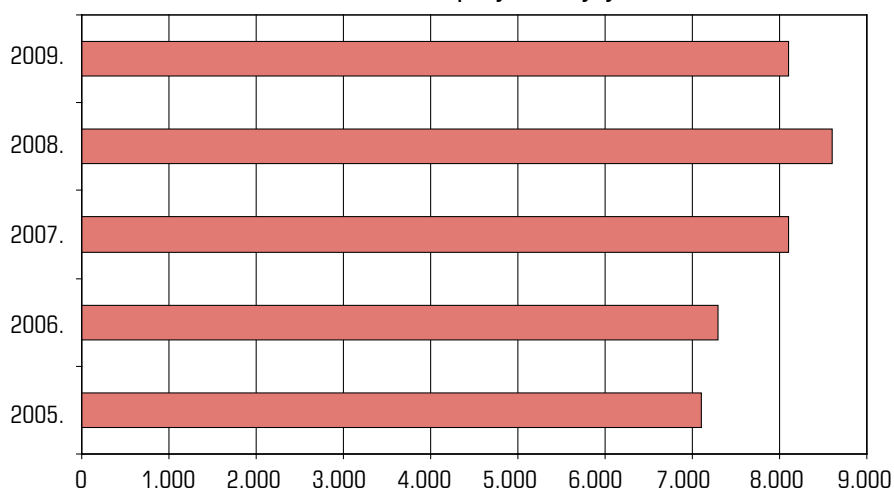
U kožarsko-prerađivačkoj industriji Hrvatske tijekom 2009. godine bilo je prosječno 8100 zaposlenih, što je oko 3,5 posto zaposlenih u prerađivačkoj industriji. Najviše ih radi u proizvodnji obuće i galanterije (90%), a manji dio u proizvodnji kože i krzna.

## EMPLOYMENT FIGURES

During 2009 there were on average 8,100 employees in the Croatian leather manufacturing and processing industry, which represents around 3.5 % of the total manufacturing workforce. Most of the workforce is in the manufacture of footwear and leatherwear (90%), with a much smaller proportion working in the manufacture of leather and fur.

Prerada kože, izrada  
galanterije i obuće  
Leather processing and  
manufacture of footwear  
and leatherwar

Broj zaposlenih prema godinama  
Number of employees by year



Izvor: DZS / Source CBS

Ukupan broj zaposlenih u republici Hrvatskoj  
Total number of employees in Croatia

Broj zaposlenih Number of employees	2005.	2006.	2007.	2008.	2009.
Proizvodnja kože i srodnih proizvoda Manufacture of leather and related products	7.100	7.300	8.100	8.600	8.100

Izvor: DZS, obrada HGK

Source: CBS, Compiled by: CCE

Indeksi zaposlenosti po odjeljcima  
Employment indices for activity subsection C 15

2005=100

Podsektor Subsection	Zaposlenost (Index) Employment (Index)				
	2005.	2006.	2007.	2008.	2009.
C 15 Proizvodnja kože i srodnih proizvoda Manufacture of leather and related products	100,0	102,8	114,1	121,1	114,1

Izvor: DZS, obrada: HGK

Source: CBS, Compiled by: CCE

## VANJSKOTRGOVINSKO POSLOVANJE

Kožarsko-prerađivačka industrija radno je intenzivna i izrazito izvozno orijentirana na tržište Europske unije, kamo se izvozi najveći dio proizvodnje (80%), i to pretežno u lohn (doradnim) poslovima. Sklapanjem ugovora o stabilizaciji i pridruživanju s EU ta je grana djelatnosti dobila povoljniji tretman pri izvozu. Od 1. studenoga 2000. godine naši obučari izvoze u EU bez carine i količinskog ograničenja. Unatoč određenim teškoćama koje prate tu industriju u prelasku na tržišno gospodarenje te u nastojanjima da postignu što veću konkurentnost, danas se očituju pozitivni pomaci i promjene u proizvodnji. Posebno se to odnosi na proizvodnju obuće i galanterije, koja vlastitim proizvodima s markom pronalazi svoje mjesto na svjetskom tržištu.

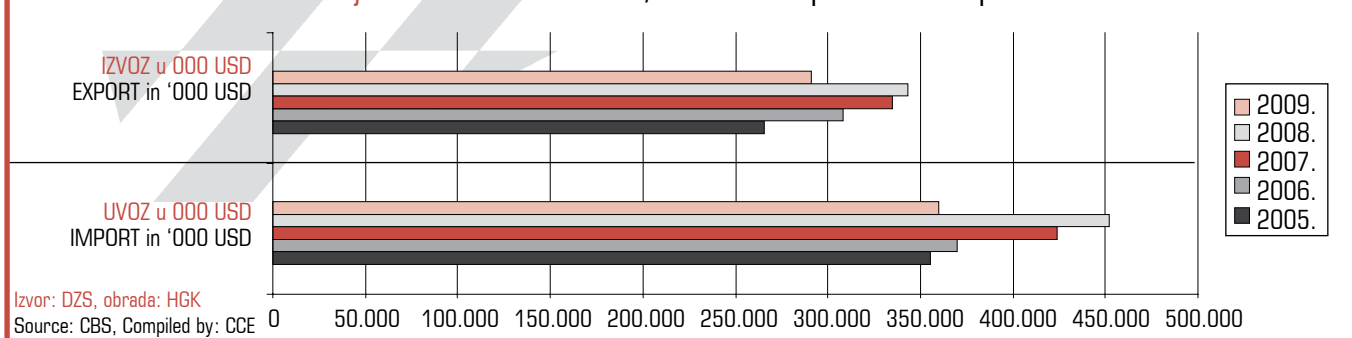
## FOREIGN TRADE

The leather processing and manufacturing industry is labour intensive and strongly export-oriented towards the EU market, where most of the output is exported (80%), mainly in the form of contract processing. With the Stabilisation and Association Agreement between Croatia and the EU, this branch has achieved more favourable export treatment. Specifically, since November 1st, 2000, Croatian footwear manufacturers have exported to the EU without tariff or quantity restrictions. In spite of certain difficulties that the industry has been facing in its transition to free market practices and in the endeavours to achieve maximum competitiveness, this sector now demonstrates progress and positive changes in manufacturing processes. This is especially evident in the manufacture of footwear and leatherwear, which is now asserting itself in the world market with its own brands.

## Vanjskotrgovinska razmjena i ukupno poslovanje u 000 Foreign trade and total revenues (HRK 000)

C 15	2005.	2006.	2007.	2008.	2009.
Ukupni prihod (000 kn) Total Revenues (000 HRK)	2.205.969	2.548.395	2.501.278	2.364.973	2.182.539
Uvoz, 000 USD Import ('000 USD)	355.362	369.636	423.835	452.421	360.047
Izvoz, 000 USD Export ('000 USD)	265.314	307.921	334.501	343.175	286.172

## Vrijednost uvoza i izvoza / Value of imports and exports



## INVESTICIJE

Ukupno ostvarene investicije u razdoblju od 2005. do 2009. godine iznosile su 509.784.000 kuna. Prijašnjih godina najveći dio investicija utrošen je u opremu, a posljednjih nekoliko godina sagrađene su i nove proizvodne hale (Bambi, Haix). Najveća ulaganja ostvarena su 2006. godine, i to u iznosu 207,589.000 kuna.

## INVESTMENT

Total investment in the period 2005 to 2009 amounted to HRK 509.784.000. In the last several years, most of the investments were channelled into the equipment, including the construction of new manufacturing workshops (Bambi and Haix). The largest investment were achieved in 2006, when investments in equipment totalled up to HRK 207.589,000.

## Ostvarene investicije 2005. - 2009. u tisućama kuna Gross fixed capital formation in 2005 - 2009 in HRK '000

Djelatnost investitora Activity of Investors		Ostvarene investicije Gross Fixed Capital Formation	Građevinski radovi Construction	Oprema Equipment
UKUPNO RH TOTAL FOR CROATIA	2005.	59.209.772	31.215.498	22.499.432
	2006.	66.069.248		
	2007.	75.480.872		
	2008.	62.414.113		
	2009.	49.899.224		
PRERAĐIVAČKA INDUSTRIJA RH CROATIAN MANUFACTURING INDUSTRY	2005.	8.056.289	2.437.824	5.005.112
	2006.	12.613.319		
	2007.	13.707.652		
	2008.	11.846.301		
	2009.	10.702.623		
C 15 Proizvodnja kože i proizvoda od kože C 15 Manufacture of Leather and Leather Products	2005.	116.294	89.527	24.712
	2006.	207.589		
	2007.	52.833		
	2008.	41.172		
	2009.	91.896		

Izvor: DZS, obrada HGK

Source: Croatian Bureau of Statistics, processed by Croatian Chamber of Economy

## SAJMOVI

Proizvođači kožarsko-prerađivačke industrije redovito sudjeluju na sajmovima specijaliziranih priredbi Zagrebačkog velesajma. Među njima je najznačajniji Međunarodni tjedan kože i obuće.

## FAIRS AND EXHIBITIONS

Representatives of the leather manufacturing and processing industry regularly participate in trade fairs and exhibitions - specialised events of the Zagreb Fair. The most prominent of these is the International Leather, Footwear,

Uz to, pod pokroviteljstvom HGK hrvatski obućari i galanteristi organizirano su nastupali na specijaliziranom sajmu obuće GDS u Düsseldorfu i na sajmu obuće MICAM u Milanu te na sajmu u Moskvi.

Od 2003. godine organizirano su sudjelovali na proljetnom i jesenskom Sajmu mode, kože i obuće u Beogradu.

Uspješnost sudjelovanja na tom sajmu naši su izlagači potvrdili dobivanjem niza priznanja u više navrata. Tako je Borovo - Kožna obuća iz Vukovara nagrađeno Zlatnom i Srebrnom košutom za žensku cipelu i Zlatnom košutom za mušku cipelu. Nagradu Zlatni prsten dobio je kreator Borova za kolekciju ženske obuće.

Ivančica iz Ivanca dobila je Zlatno lane za dječju obuću marke Froddo te Srebrno lane za dječju cipelu, a tvrtka San Peter iz Malog Bukovca dobila je čak tri Zlatne košute - za mušku i žensku poslovnu torbu te žensku modnu torbicu. Od 2005. godine obućari samostalno sudjeluju na sajmu obuće u Moskvi te na sajmu MICAM u Milanu, dok proizvođači galanterije također samostalno izlažu na sajmu MIPEL Milano te u Dusseldorfu.

Proizvođači iz Hrvatske redovito posjećuju i druge modne i proizvodne manifestacije (Bologna, Milano, Düsseldorf) i time prate trendove inovacija i suvremenih tokova u toj djelatnosti.

and Clothing Week.

In addition, sponsored by the Croatian Chamber of Economy, Croatian footwear and leatherwear manufacturers exhibited at the GDS, the annual specialised footwear fair, in Düsseldorf, Germany as well as at MICAM footwear fair in Milan, Italy, and at the Moscow Fair also.

Since 2003, they have also exhibited at the spring and autumn Fashion, Leather and Footwear Fair in Belgrade. The success achieved by our exhibitors at the latter event is evidenced by a number of awards on various occasions. Thus, the Borovo - Kožna obuća company (Borovo Leather Footwear Company) from Vukovar received the Zlatna and Srebrna košuta awards for their ladies' shoe, and the Zlatna košuta award for the men's shoe. The Zlatni prsten award went to Borovo's designer for his collection of ladies' shoes. The Ivančica company from Ivanec received the Zlatno lane award for their children's footwear with the brand name Froddo, and the San Peter company from Mali Bukovac received three Zlatna košuta awards - for their men's and ladies' business bags, and for their ladies' fashion bag. Since 2005, the footwear manufacturers individually prepare their collections for participation at the Moscow Fair as well as MICAM fair in Milan whereas manufacturers of accessories exhibit individually on fairs MIPEL in Milan and Dusseldorf, as well. Croatian manufacturers also regularly participate in other fashion fairs and exhibitions as well as numerous specialised branch events (Bologna, Milan, Düsseldorf) following, thus, the latest innovation tendencies and trends in this branch.

### Deset najvećih tvrtki kožarsko-prerađivačke industrije 2009.

#### Ten prominent leather manufacturing and processing industry companies in Croatia during 2009

Redni broj / Rank	Naziv tvrtke / Company Name and Location of Seat	E-mail, internetska stranica
1.	BOXMARK LEATHER d.o.o., Trnovec Bartolovečki	office@boxmark.com, www.boxmark.com
2.	HAIX OBUĆA d.o.o., Čakovec	s.mlinaric@haix.de, www.haix.com
3.	IVANČICA d.d., Ivanec	ivancica@ivancica.hr, www.ivancica.hr
4.	INKOP OBUĆA d.o.o., Poznanovec	inkop@inkop.hr, www.inkop.hr
5.	PSUNJ d.d., Rešetari	psunj1@viviani.com, www.psunj.hr
6.	BOROVO - Kožna obuća d.o.o., Vukovar	direktor@borovoko.hr, www.borovo.hr
7.	BOROVO - Gumitrade d.o.o., Vukovar	borovo.gumitrade@vk.t-com.hr, www.borovo.hr
8.	BAMBI d.o.o., Varaždin	bambi-info@vz.t-com.hr, www.bambi.hr
9.	VIKO d.o.o., Varaždin	viko@viko.hr, www.viko.hr
10.	SIGA d.o.o., Varaždin	sig@sig.hr, www.siga.hr

### STRUKOVNO UDRUŽIVANJE

U sklopu HGK djeluje Strukovno udruženje kožarsko-prerađivačke industrije koje prati djelatnost po grupacijama:

- Grupacija koža
- Grupacija proizvođača obuće i galanterije

Glavna je uloga Udruženja promicanje rada i poslovanja te zaštita interesa hrvatskih proizvođača u Hrvatskoj i inozemstvu. Također, Udruženje kontinuirano prati zakonsku regulativu i pokreće inicijative za donošenje i promjenu zakonskih propisa i mjera od interesa za gospodarstvo.

### PROFESSIONAL ASSOCIATION

The Croatian Chamber of Economy covers the activities of the leather manufacturing and processing industry through the following Groups working within the CCE's Leather Processing Industries Association:

- Tanning and dressing of leather
- Manufacture of leatherwear and footwear

The main role of the Association is promoting work and business as well as protection of Croatian manufacturers' interests in Croatia and abroad. The Association continuously keeps in touch with the legislative procedures and initiates passing and changes of legal regulations and measures which are of interest to the economy, also.



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