USAID | MACEDONIA
FROM THE AMERICAN PEOPLE

AgBiz Program

Croatian Fresh Produce Market Report

January 2009

Disclaimer

Contents

TABLES

MAPS

APPENDICES

1. BACKGROUND AND OBJECTIVES

During January 2009, “KnowledgePower” as the service provider for ARD’s AgBiz Project in Macedonia conducted research on the current market position and potential of trade expansion for 5 selected Macedonian products: tomatoes, bellpeppers, cucumbers, cabbage and watermelon.

As part of its market research, “KnowledgePower” conducted a series of market surveys and interviews with key Croatian fresh produce companies, representative of major market outlets such as fresh markets, wholesale markets and supermarket chains, and collated trade and production data from relevant Government sources. The result of these market research findings are presented in this Report.

2. INTRODUCTION

Due to its geographical position, unique territorial distribution and excellent natural resources, the Republic of Croatia has a great potential to produce a wide range of agricultural products. The northern inland part, encompassing some of the most fertile Pannonian lowlands, is well situated for dairy, cereal and horticulture production. The southern Mediterranean part of Croatia is famous for its wine, olive oil, subtropical and horticultural production. The total Croatian agricultural area is 1,216,000 of which most is utilized for row crop production such as maize, wheat and oilseed crops.

Table 1. Arable Land Utilization

Category	Total (hectares)	% Total
Agricultural Area	1,216,000	100.0
Arable Area	1,106,000 of which:	91.0
Cropland	866,000	71.2
Orchards	46,000	3.8
Vineyards	31,000	2.5
Meadows	163,000	13.4
Pastures	110,000	9.0

Source: State Statistical Bureau (SSB)

According to the 2001. population census, the rural population constituted 44.4% or 1.971,000 out of the total 4.437,000 inhabitants, who owned 80% of arable land. Data from the Agriculture Census of 2003, showed that Croatia had 448,532 family farms and 1,364 registered business entities that are engaged in farming. Out of the total 1,106,000 hectares of utilized arable land, family farms own 888,792 ha**,** whilst the remaining 217,208 ha ha is owned by business entities.

Whilst its contribution towards the economy has been dropping since 2001, Croatian agriculture still significantly contributes to the economy with a 5% share of GDP in 2008, and is the base of its food industry which employs around 145,319 and contributes an additional 3% of GDP. As a result, the Croatian Government views agriculture and food industry as strategic segments for the future development of the Croatian economy.

The main developmental feature of Croatian agriculture during the last couple years has been a rapid consolidation and industrialisation of agricultural production. This trend has been induced by the privatisation of ex-State owned food industries and emergence of supermarkets as major buyers in the meat and fresh produce segments.

Despite the natural potential and Government support, one of the best indicators on how much still needs to be done to improve the production practices and increase the overall sectors competitiveness is reflected from the Croatian agricultural trade balance. This is even more striking given the fact that prior to the break-up of Yugoslavia, Croatia was a major food exporter.

Table 2. Croatian Agricultural Products Trade Balance (in 000 US$)

YEAR	**EXPORTS**	**IMPORTS**	**BALANCE**
2000	422,875	710,393	-280,829
2001	486,681	870,419	-375,441
2002	579,547	1.035,255	-441,825
2003	789,745	1.289,854	-487,595
2004	765,550	1.492,330	-714,604
2005	740,140	1.615,674	-695,233
2006	1.190,370	1.847,682	-657,364
2007	1.312,981	2.149,987	-837,006
2008	1.221,658	2.420,170	-1.198,512

Source: State Statistical Bureau (SSB)

3. DOMESTIC PRODUCTION AND CONSUMPTION

The precise size of the vegetable sector is uncertain because a substantial proportion is marketed direct to consumers or retailers and is not currently measured. However, it is believed that the area under commercial vegetable production is around 13,000 hectares with some additional vegetable production in home gardens.

Table 3. Crop Areas

Crop	2005. (000' ha)	2006. (000' ha)	2007. (000' ha)
Cereals	557	570	559
Orchards	30	32	33
Vegetables	9	10	13
Industrial Crops	129	117	94
Vineyards	30	31	32
Gardens	8	8	5

Source: State Statistical Bureau (SSB)

The geographical distribution of vegetable growing generally is a function of natural conditions for growing particular vegetable crops, and access to markets. In Croatia, vegetable producers are mainly concentrated in the region around Zagreb, Varaždin-Virovitica and Slavonia in the continental part of Croatia, whilst Istria, Zadar and Metković are major production areas on the coast.

Map 1. Main Vegetable Production Areas

In the ex-Yugoslavia socialist economy, the role of Croatia was seen as supplying the other parts of the Federation with meat, dairy, cereals and edible oils. The fruit and vegetable productions were mainly developed in the southern Yugoslav Republics. Therefore, Croatia had a relatively small horticulture subsector which has rapidly expanded since 2000. Indicative of such rapid expansion, the production of cabbage has increased by 140%, tomato by 313%, bellpeppers by 281%, cucumbers by 438%, and watermelons 142%.

Table 4. Croatian Production of Selected Fresh Produce

	Unit	2000.	2005.	2006.	2007.
Cabbage and Kale	Hectares	1.390	2.278	1.909	2.088
	MT	27.351	50.967	48.771	38.300
Tomato	Hectares	477	1.192	1.014	1.682
	MT	15.330	28.930	29.027	48.076
Bellpeppers	Hectares	1.357	2.243	2.985	3.365
	MT	12.601	34.430	46.132	35.882
Cucumbers	Hectares	257	551	523	698
	MT	4.379	11.122	11.059	19.207
Watermelons	Hectares	929	974	984	1.323

	MT	24.009	28.852	26.549	30.184

Source: State Statistical Bureau (SSB)

The domestic consumption pattern is quite difficult to exactly determine due to the fact that precise statistical data by crop is non-existant. However, it is indicative that Croatians have the largest consumption per capita of fruitlike vegetables such as tomato, bellpepper, cucumber, eggplant and squash compared to the other vegetable type groupings.

Table 5: Consumption per Household Member

Vegetable Group	Unit	2007.
Cabbage type vegetables (cabbage, kale, broccoli, cauliflower)	kg	11,7
Fruit type vegetables (tomato, eggplant, bellpepper,cucumber, squash)	kg	18,2
Other fruit (watermelons, melons)	kg	5,3

Source: State Statistical Bureau (SSB)

However, another indication of the Croatian consumption patterns can be drawn from the production, imports and exports data which shows that the consumption of fruitlike vegetables and watermelons/melons is somewhat higher due to the fact that the household survey data represents a smaller sample, whilst the consumption for the cabbage like vegetables group is pretty close to the household survey figures of the State Statistical Bureau.

Table 6: National Consumption of Selected Fresh Produce (000' MT)

Year	Production	Imports	Exports	National Consumption (MT)	Consumption per capita (kg)
2006					
Tomato	29,027	13,754	201	42,580	9.59
Cabbage	48,771	2,834	112	51,493	11.60
Cucumbers& Gherkins	11,059	4,560	329	15,290	3.44
Bellpeppers	46,132	3,522	1,630	48,024	10.82
Watermelons	26,549	6,908	1,768	31,689	7.14

2007					
Tomato	48,076	12,554	300	60,330	13.59
Cabbage	38,300	1,609	1,069	38,840	8.75
Cucumbers& Gherkins	19,207	4,172	165	23,214	5.23
Bellpeppers	35,882	2,661	1,920	36,623	8.25
Watermelons	30,184	7,690	1,574	36,300	8.18

Source: State Statistical Bureau (SSB)

4. MARKET CHANNELS/OUTLETS/BUYERS, SHARES AND TRENDS

The Croatian food marketing scene is divided into 3 main segments, supermarkets chains, shops/wholesale markets and open markets. The Croatian food & fresh produce marketing channels during the last 7 years have gone through a profound transformation with a rapid rise of supermarket channels becoming the main outlets.

Fresh produce distribution data is not tracked separately, but developments and percentages closely follow the general food distribution pattern of 50-55% being marketed through supermarket/cash & carry/discounters, 35-40% through wholesale markets and 5-10% through green markets and other channels.

4.1 Supermarkets

Rapid development of supermarket chains and distribution started in 2000. Till then, most food and fresh produce were distributed through small shops, fresh markets and wholesale markets. This is characterized by the appearance and development of domestic and foreign supermarket chains, which in 2001 had a market share 16.6%, whilst in 2007, the market share of 15 leading supermarket chains risen to 70%. Today besides the domestic supermarket “Konzum” which leads and has close to 30% of retail market share, most major regional and EU-based supermarket chains such as Mercator Billa, Spaar, Kaufland, Lidl, Metro, have well developed businesses with a strong focus on fresh produce.

Konzum supermarket chain, part of the Croatian Agrokor Corporation, is the leader in the supermarket category with over 680 retail stores, and 20 wholesale centers in Croatia, as well as 20 retail stores in Bosnia & Herzegovina and Serbia. Since Konzum views its fresh produce segment as strategic, to increasing its competitiveness and profit, this supermarket chain has undertaken major efforts to accomplish vertical integration from field to shelf. To achieve this, Konzum has bought major fresh produce production organizers such as PZ Matijevic in Slavonia, DAD Neretva in southern Dalmatia and a number of others. Today around 50% of Croatian horticulture production is organized and channeled by Konzum in this way. Konzum has also invested heavily in modern storage and packing facilities, since postharvest handling is needed to meet rising customer expectations regarding fresh produce quality. Due to such an approach, Konzum has developed its own fresh produce brand, KORA.

Agrokor Corporation, which owns Konzum, as part of its regional development, has bought land and is planning to establish buy-out/distribution facilities in Strumica. Fresh produce from this facility would not only be distributed in Croatia, but also in Bosnia & Herzegoviona and Serbia, where Konzum has retail outlets. Given the Macedonian potential, Konzum is interested in sourcing up to 5,000 MT of tomatoes, 2,500 MT of cucumbers, 4,000 MT of bell peppers, 3,500 MT of cabbage and 4,500 of watermelons from Macedonia.

Other big supermarket/cash and carry companies interviewed, such as Billa, Kaufland and METRO also try to do direct sourcing from the larger Croatian producers. Regarding imports, supermarket chains, as they grow, tend to move towards direct importing Therefore, the importance of wholesale companies as suppliers to supermarkets will continue to decline.

Macedonian fresh produce is seen by interviewed supermarket buyers as an important source, due to the fact that it comes earlier then Croatian produce. Macedonian produce is also important in the season, viewed as a excellent reserve option, if Croatian production fails and/or due to acceptable prices. The most significant trade items for them are tomatoes, followed by cucumbers, bell peppers, watermelon and lastly cabbage.

:4.2 Wholesale markets

Wholesale markets and wholesale companies cover 35-40% of the fresh produce market. Major wholesale markets exist in Zagreb, Rijeka, Osijek, Split and Zadar. Their main customers are state institutions, small shops, open markets, and supermarket chains. Wholesale importers/distributers, are significant buyers of Macedonian tomatoes, bell peppers, cucumbers, watermelon and cabbage, since most of their buyers fall into the lower quality standards category.

As part of this market research, interviews were held with leading Croatian wholesale importers of Macedonian produce such as Usora-Trans, Trgo-Zvon and Ficula d.o.o.

4.3 Open Markets

Open markets in the past socialist period had a significant role in the fresh produce trade. However, their importance today in bigger cities is low, covering around 5-10% of trade. Open markets mainly function as outlets of lower quality imported fresh produce or domestic produce coming from smaller producers, and are located around city/town main squares.

4.4 Comparative Market Prices

Indicative of seasonal supply fluctuations, quality and sellers margin are comparisons of prices for different types of sales outlets such as open markets, wholesale markets and retail shops, that are collected by the Croatian Market Information System (TISUP). The highest prices for fresh produce were during the January-May period (Spring and Winter) for all five selected fresh products. Open markets have the highest prices, at least 30%,higher then at the wholesale markets.

The average prices in 2008 for tomatoes ranged from 18.5 HRK/kg in January to 4.8 HRK/kg in August, the highest price period being January to May.

The average prices in 2008 for white cabbage ranged from 8.11 HRK/kg in May to 2.11 HRK/kg in August, the highest price period being January to May.

The average prices in 2008 for salad cucumbers ranged from 17.99 HRK/kg in March to 4.17 HRK/kg in July, the highest price period being January to May. The average prices in 2008 for gherkins ranged from 12.25 HRK/kg in January to 5.83 HRK/kg in August, the highest price period being October to January.

The average prices in 2008 for Babura type bell peppers ranged from 29.00 HRK/kg in April to 5.05 HRK/kg in August, the highest price period being January to May. The average prices in 2008 for other fresh type bell peppers ranged from 28.75 HRK/kg in April to 11.75 HRK/kg in August, the highest price period being January to May. The average prices in 2008 for “Rog” type bell peppers ranged from 26.00 HRK in April to 6.23 HRK/kg in August, the highest price period being January to May.

The average prices in 2008 for watermelons ranged from 15.04 HRK/kg in May to 1.7HRK/kg in August, the highest price period being January to May.

The complete listing of prices for open markets, wholesale markets and retails shops for 12 months of 2008 are given in Appendix A.

5. MARKET PREFERENCES AND TRENDS

5.1 Varieties

According to Croatian wholesale importers interviewed, Croatian customers prefer “Belle” type tomatoes. The most traded categories are G and M calibers of tomatoes. It is also important that the individual tomato is relatively large (300-400 gr.) and has a red skin color. During the last years, prominence of new tomato types such as “grapolo tomatoes” have risen, with 5-6 fruits in a branch. These mainly come from Croatian hydroponic and Italian/Dutch imports, and are higher priced. Cherry tomatoes are also a new development in the market.

Preferred varieties of salad cucumbers are French-type. These should be up to 20 cm length, characterized by deep green skin.

Regarding cabbage, 90% cabbage sold is white cabbage for fresh consumption or in the Autumn for processing. Types such as the Pharaoh, Balbro early and Saratoga late type varieties are preferred. The preferred cabbage head size 1-1.2 kg.

Watermelon varieties “Fantasy” are preferred with weight being between 10-15 kg. During last Summer, Konzum and some other supermarket chains have introduced personal size watermelons. This is certainly a varietal segment that is going to grow, given changing consumer habits in the bigger Croatian cities.

Besides numerous bell pepper varieties for fresh consumption, with varieties coming from companies such as Enza Zaden and Harris Moran, bell peppers types that are well recognized on the market are the “Rog” and “Babura”. These are also used for home processing. The “Kapija” type bell peppers are also sold, but in much smaller volumes then the other two.

5.2 Packs and Packaging

Regarding packaging, tomatoes, bell peppers and cucumbers are packed in corrugated carton boxes of 5 – 10 kg (depending on value of produce packed). The main change in packaging has been brought about by the supermarket chains as the main fresh produce outlets. Cabbage is usually sold in wooden crates 8 heads/10 kg or in bins. Watermelons are sold in bins. Fresh produce coming from competing countries such as Spain, Turkey, Holland is calibrated on packaging lines. Thus, their appearance to consumers indicates high and uniform quality.

The most recent trend in packaging is also driven by supermarkets, with Konzum heavily investing in packing lines in its buy-out centers in Slavonia and Dalmatia. The plan is to move towards itemized packing by using flowpack systems for tomato, cabbage, bell peppers, etc. (There may be a great number of variations, by crop, by variety, color , and what is packed and how depends on buyer so difficult to go into listing various packs. Examples given in Appendix D.)

Wooden crate packaging is still present at the wholesale and fresh markets outlets, but carton boxes are an increasing trend. Wholesale importers also indicated that the quality of wooden packaging is often poor/dirty, pallets poorly palletized, all which causes them problems in selling Macedonian produce to their more demanding customers.

5.3 Labeling

According to the “Quality Standards for Vegetables” the labeling of fresh produce must provide the customer the following information:

1. Identification - Name and address of supplier/importer;

2. Type of Vegetable – tomato;

3. Origin of Product – Country of origin;

4. Year of production; and

4. Product Determinants – Class, plus other attributes prescribed by the “Croatian Vegetable Quality Standard” such as : size, caliber, flesh color etc.;

5.4 Origins

Croatian customers have a strong perception that “domestic Croatian” produce is safe and of good quality. This perception has been developed in the past, when foreign fresh produce was scarce, as well as the fact that most Croatian produce comes within the Summer season as tree or vine ripened. Recognizing this fact, a number of production organizers or producer organizations have branded their fresh produce under regional labels such as “Produce from Dalmatia” or “Varazdin Cabbage”, etc.

Macedonia is strongly associated with fresh and “natural” produce and grapes and has a traditionally strong “brand” in that sense. However, Macedonian produce is very conservatively advertised, mainly at the open markets. Macedonian fresh produce is also well recognized by consumers as Autumn product used for domestic processing.

5.5 Seasonality

Croatian production of the five reviewed fresh produce crops (tomato, cucumber, cabbage, bell peppers and watermelon) is highly seasonal. Most of production falls into the Summer period (1. June – 1. October) period. The out of season production of these crops is mainly achieved under plastic tunnels and in the Mediterranean parts of Croatia (Istria, Zadar and Metković). The start of the Croatian early tomato production is around 1. May, early cabbage 15 March, bell peppers 1. May, cucumbers 15. May and watermelon 15. June.

6. COMPETITOR ANALYISIS

6.1 Domestic Competition

Even though the Croatian horticulture sector has seen rapid growth of tomato, cucumber, bell pepper, cabbage and watermelon production during the last 8 years, Croatia still is a large net importer of these products. The main feature of Croatian production is that majority of production comes in the Summer period, leaving Winter and Spring completely to imports. However, to fill part of that lucrative period, during the last couple years there has been a strong move towards hydroponic production.

Another feature in production of fresh produce is the vertical integration “from field to shelf” that has been carried out by Agrokor, the largest Croatian company. As part of such a scheme, Agrokor which already owns Konzum, has been buying major production organizer companies, throughout Croatia and is investing heavily in storage, postharvest handling and packaging facilities.

6.2 Foreign Trade & Competition

Regarding Croatian trade of these horticultural products, there is a growing trend for all five selected products. Regarding exports, besides watermelons and bell peppers, the exported quantities are small, the main markets being Bosnia & Herzegovina, Slovenia and Austria.

Table 7: Croatian Trade of Selected Fresh Produce

CROP	IMPORTS (MT)	IMPORTS (Value)	EXPORTS (MT)	EXPORTS (Value US$)
Tomato				
2005				
2006	13.754	11.022.335	201	156,731
2007	12.554	12.567.267	300	225.023
I-XI 2008	12.700	14.205.652	508	500.202
Cabbage				
2005				
2006	2.834	1.044.108	112	45.544

2007	1.609	686.520	1.069	237.453
I-XI 2008	4.107	2.020.707	417	172.207
Cucumbers & Gherkins				
2005				
2006	4.560	2.966.098	329	154.355
2007	4.172	3.653.487	165	85.986
I-XI 2008	4.386	4.282.156	50	31.640
Bell peppers				
2005				
2006	3.523	3.584.262	1.630	849.295
2007	2.661	4.627810	1.920	1.216.329
I-XI 2008	3.409	5.354.476	681	680.556
Watermelons				
2005				
2006	6.908	2.354.229	1.768	482.332
2007	7.690	2.341.023	1.574	419.180
I-XI 2008	8.322	3.262.163	1.593	534.404

Source: State Statistical Bureau (SSB)

Regarding trade with ex-Yugoslav Republics, in 2007 imports from them constituted 12.9% of total imports, whilst for the same period exports constituted 51.9%. Regarding Croatian imports of the five selected horticulture products, Macedonia is the most important sources with some competition from Bosnia & Herzegovina in watermelons and gherkins. Croatian exports in the region of tomatoes, cucumbers, bell peppers, watermelons and cabbage are exclusively going to Bosnia & Herzegovina and Slovenia.

Table 8: Croatian Regional Trade – Agriculture & Food (in US$)

	EXPORTS 2006.	EXPORTS 2007.	Total Share % 2007.	Regional Share % 2007.
Total Croatian Exports	**1.190.317.804**	**1.312.981.081**	**100,0**	
Countries in Region	**490.365.708**	**681.071.670**	**51,9**	**100,0**
Of which:				
BOSNA & HERZEGOVINA	295.844.590	424.556.556	32,3	62,3
SLOVENIA	82.895.817	109.081.460	8,3	16,0
MACEDONIA	24.113.693	32.270.415	2,5	4,7
	IMPORTS 2006.	**IMPORTS 2006.**	**Total Share % 2007.**	**Regional Share % 2007.**
SLOVENIA	90.182.858	101.246.650	4,7	36,5
BOSNA & HERCEGOVINA	58.147.329	84.401.317	3,9	30,5

MACEDONIA	30.750.443	37.397.898	1,7	13,5

Source: State Statistical Bureau (SSB)

Croatia imports tomatoes during the Winter and Spring, with the main competitors in this period being Spain, Turkey, Italy and Holland. Macedonian tomato imports almost all fall into the Summer period, bringing lower prices as a result. During this period imports from other competitors are insignificant.

Table 9: Imports of Tomatoes

CROP	YEAR	IMPORTS RANK	VOLUME (MT)	VALUE (US$)	VALUE/MT (US$)
TOMATO					
	2006	MACEDONIA	3,938	1,988,676	505
		SPAIN	3,232	1,683,240	521
		TURKEY	2,374	3,010,668	1,268
		ITALY	1,922	1,803,192	938
		HOLLAND	1,202	1,173,897	977
	2007	SPAIN	3,483	3,792,826	1,089
		TURKEY	2,858	2,527,515	884
		MACEDONIA	2,394	1,916,246	800
		ITALY	1,723	2,058,156	1,195
		HOLLAND	1,163	1,181,711	1,016
	2008 (I-XI)	MACEDONIA	3,909	3,110,036	796
		SPAIN	3,734	4,718,386	1,264
		ITALY	1,909	2,223,737	1,165
		TURKEY	1,544	1,918,162	1,242
		HOLLAND	955	1,243,575	1,302

Source: State Statistical Bureau (SSB)

Croatia imports of cabbage during early Spring mainly comes from Holland (45-50%) and Macedonia. Macedonian imports also occur during the Summer or the Autumn period Autumn (for processing), bringing lower prices as a result. Smaller competitors in cabbage are Austria, Germany and Slovak Republic.

Table 10: Imports of Cabbage

CROP	YEAR	IMPORTS RANK	VOLUME (MT)	VALUE (US$)	VALUE/MT (US$)
CABBAGE					
	2006	MACEDONIA	1,217	437,932	360
		HOLLAND	1,006	409,859	407
		GERMANY	122	52,353	429
		BOSNIA&HERZEGOVINA	94	12,945	138

		SLOVAK REPUBLIC	57	15,287	268
	2007	MACEDONIA	1,073	412,262	384
		HOLLAND	294	185,473	631
		BOSNIA&HERZEGOVINA	126	34,656	275
		AUSTRIA	30	11,401	380
		ITALY	30	12,310	410
	2008	HOLLAND	1,576	915,545	581
		MACEDONIA	807	610,434	756
		BOSNIA&HERZEGOVINA	721	167,433	232
		AUSTRIA	268	114,165	426
		SLOVAK REPUBLIC	125	43,682	349

Source: State Statistical Bureau (SSB)

Croatia imports cucumbers during early Spring and Summer with competitors such as Spain with a import share from 45-55% of cucumber imports, followed by Italy. Macedonian cucumber imports mainly fall within the Croatian cucumber season (Summer), bringing lower prices as a result. Regarding gherkins, the strongest competition comes from suppliers in Bosnia & Herzegovina and Hungary.

Table 11: Imports of Cucumbers & Gherkins

CROP	YEAR	IMPORTS RANK	VOLUME (MT)	VALUE (US$)	VALUE/MT (US$)
CUCUMBER					
	2006	MACEDONIA	1,479	723,479	489
		SPAIN	976	934,900	958
		BOSNIA&HERZEGOVINA	776	509,711	657

		ITALY	472	395,196	837
		HUNGARY	400	235,810	590
	2007	BOSNIA&HERZEGOVINA	1,373	1,067,252	777
		SPAIN	1,047	1,132,522	1,082
		MACEDONIA	910	587,379	645
		ITALY	823	845,904	1,028
	2008 (I-IX)	BOSNIA&HERZEGOVINA	1,657	1,565,285	945
		SPAIN	1,093	1,311,983	1,200
		MACEDONIA	1,053	744,255	707
		ITALY	579	627,432	1,084

Source: State Statistical Bureau (SSB)

Croatia imports bell peppers during early Spring and Summer mainly from Spain which has a share in this period from 70-75%, followed by Morocco, Holland, Turkey. Macedonian imports mainly fall within the Croatian bell pepper season (Summer), or Autumn for processing, bringing lower prices as a result. Regarding “Kapija” type imports, the main Macedonian competitors are Serbia and Spain.

Table 12: Imports of bell peppers

CROP	YEAR	IMPORTS RANK	VOLUME (MT)	VALUE (US$)	VALUE/MT (US$)
BELLPEPPER					
	2006	SPAIN	1,228	1,784,007	145
		SERBIA	752	219,324	292
		TURKEY	471	470,253	998

		MACEDONIA	367	259,314	706
		ITALY	259	369,424	1,426
	2007	SPAIN	1,195	3,377,267	2,826
		TURKEY	521	634,452	1,218
		MACEDONIA	430	354,351	824
		SERBIA	364	181,406	498
		ITALY	251	425,212	1,694
	2008 (I-IX)	SPAIN	1,035	2,281,299	2,204
		MACEDONIA	1,016	801,325	789
		TURKEY	480	714,966	1,489
		HOLLAND	267	641,035	2,401
		ITALY	185	312,404	1,689

Source: State Statistical Bureau (SSB)

The main Macedonian watermelon competitors are in the Spring/early Summer period Greece with a import share from 55-75%, followed by Italy, Spain and Turkey. Macedonian imports mainly fall within the Croatian watermelon season (Summer), bringing lower prices as a result. During this period the strongest competition comes from suppliers in Bosnia and Herzegovina.

Table 13: Imports of watermelons

CROP	YEAR	IMPORTS RANK	VOLUME (MT)	VALUE (US$)	VALUE/MT (US$)
WATERMELON					
	2006	GREECE	3,143	1.150,164	366
		MACEDONIA	1,741	333,023	191

		ITALY	964	416,002	432
		TURKEY	391	175,847	450
		BOSNIA&HERZEGOVINA	201	46,844	233
	2007	GREECE	3,501	1.133,269	324
		MACEDONIA	1,800	275,074	153
		ITALY	1,082	299,906	277
		BOSNIA&HERZEGOVINA	974	184,856	190
		SPAIN	201	181,366	902
	2008 (I-IX)	GREECE	3,254	1.373,962	422
		MACEDONIA	2,136	567,463	266
		BOSNIA&HERZEGOVINA	1,207	270,194	224
		TURKEY	550	275,612	501
		ITALY	483	316,321	655

Source: State Statistical Bureau (SSB)

7. MARKET ACCESS

7.1 Custom Tariffs

Croatia and Macedonia are part of the CEFTA. Under this trade agreement, Macedonia has preferential quotas for tomatoes, cucumbers, watermelon and bell peppers, whilst Macedonian cabbage falls under a free import custom tariff regime.

Table 14: Croatian Custom Tariff Selected Fresh Produce

CT	TITLE	UNIT	BASE	MACEDONIA

			CUSTOM TARIFF RATE	
	CHAPTER 7 - VEGETABLES, ROOTS&TUBERS			
0702 00 00	**Tomato, fresh or cooled:**			Attachment 7
0702 00 00 10	from 1. January to 31. May	kg	15	Attachment 7
0702 00 00 15	from 1. June to 25. Sept.	kg	30,0 € / 100 kg	Attachment 7
0702 00 00 20	from 26. September to 31. December	kg	15	Attachment 7
0704	**Cabbage, fresh or chilled:**			
0704 90	**other:**			
0704 90 10	white and red cabbage:			
0704 90 10 05	from 1. January to 15. January	kg	15 + 7,0 € / 100 kg Max 35	Free Regime
0704 90 10 10	from 16. January to 14. October	kg	14	Free Regime
0704 90 10 20	from 15. October to 31. December	kg	15 + 7,0 € / 100 kg Max 35	Free Regime
0707 00	**Cucumbers and gherkins, fresh or chilled:**			Attachment 7
0707 00 05	Cucumbers:			
0707 00 05 10	from 1. January to 14.May	kg	15	Attachment 7
0707 00 05 15	from 15. May to 31. October	kg	15 + 14,0 € / 100 kg Max 49	Attachment 7
0707 00 05 20	from 1. November to 31. December	kg	15	Attachment 7
0707 00 90	gherkinsi:			Attachment 7
0707 00 90 10	from 1. January to 14. May	kg	12	Attachment 7
0707 00 90 15	from 15. May to 31. October	kg	35	Attachment 7
0707 00 90 20	from 6. November to 31. December	kg	12	Attachment 7
0709 60	**Bellpeppers type Capsicum or Pimenta:**			
0709 60 10	Sweet: type Kapija and type Rotund tehnologically mature:			
0709 60 10 10	from 1. January to 31. July	kg	8	Attachment 7

0709 60 10 25	from 1. August to 30. September	kg	20	Attachment 7
0709 60 10 40	from 1. October to 31. December	kg	8	Attachment 7
	other:			
0709 60 10 50	from 1. January to 14. May	kg	14	Attachment 7
0709 60 10 55	from 15. May to 20. November	kg	15 + 21,0 € / 100 kg	Attachment 7
0709 60 10 60	from 21. November to 31. December	kg	14	Attachment 7
0807 11 00	**Watermelons:**			
0807 11 00 10	from 1. January to 30. June	kg	10	Attachment 7
0807 11 00 15	from 1. July to 30. September	kg	10 + 8,5 € / 100 kg	Attachment 7
0807 11 00 20	from 1. October to 31. December	kg	10	Attachment 7

Source: Croatian Chamber of Commerce

Attachment 7. summarizes the preferential custom quotas for products imported from Macedonia negotiated under the CEFTA agreement and custom tariff rates imported out of the allocated quotas.

Table 15: Attachment 7

CT	PRODUCT	CUSTOM QUOTA (MT)	PREFERENTIAL CUSTOM TARIFF RATE WITHIN QUOTA (%)	CUSTOM TARIFF RATE FOR GOODS OUT OF QUOTA
07020000	Tomato	4000	0	45% of the base custom tariff
070700	Cucumbers	1200	0	45% of the base custom tariff
070960	Bellpeppers	3500	0	45% of the base custom tariff
08071100	Watermelons	7500	0	45% of the base custom tariff

Source: Croatian Chamber of Commerce

Regarding the future Custom Tariff regime for Macedonian fresh produce to be exported to Croatia, the major expected change will come with future Croatian accession to the EU, probably in year 2010 or 2011 in line with the EU Common Custom Tariff policy.

7.2 Quality standards/certificates

As part of its preparations for the EU and based on its “Food Law”, Croatia in September 2008 passed in its legislation the “Quality Standards for Vegetables”. These Standards are published within the “State Official Gazette (Narodne Novine)”

Number 114/2008, which is available at the following Web site: www.narodne-novine.nn.hr.

These Standards determine that tomatoes have Market Class E, I, II, while bell peppers, cabbage, cucumbers and watermelon have Class I and II. However, due to the lack of packing facilities and other operational issues, almost all fresh produce is currently sold under Market Class II.

Croatian fresh produce buyers carry out inspections of incoming produce based on calibration, weight, and other quality parameters, rather then produce temperature control.

Even though the level of consumer concern about the food safety of fresh produce on the market has increased, currently no Croatian fresh produce buyers require GLOBALGAP or HACCP certification of its foreign fresh produce suppliers. In line with this growing concern, during the last year there were a couple leading newspaper articles on unacceptable levels of pesticides found on imported fresh produce from Spain and Turkey.

To ensure Croatian food safety requirements are met, the State Food Inspectorate takes samples of imported fresh produce for laboratory analysis on MRL and other potentially harmful substances.

As part of its EU Accession process Croatia has developed the Book of Regulations on MRL in fresh produce and food products (Official Gazette 148/08, which is available at the following Web site: www.narodne-novine.nn.hr.) and which is equivalent to the EU Regulation 396/2005 and all its Ammendments.

All interviewed importers of Macedonian tomatoes, bell peppers, cabbage, watermelon and cucumbers have indicated that no such problems were associated with Macedonian produce.

8. BUYERS PERCEPTIONS OF MACEDONIAN PRODUCTS

8.1 Positive Perception

Macedonian fresh produce imports have a long traditional presence on the Croatian market, based on trade patterns in ex-Yugoslavia, and are a well recognized “brand”, especially in the green and wholesale markets. All buyers interviewed indicated a strong interest to continue and expand their imports from Macedonia. They also stress the fact that during field inspections they carry out in Macedonia the quality observed of fresh produce is excellent. They also stress that Macedonian fresh produce carries strong brand recognition from the past.

8.2 Negatives

All buyers stress there are major problems associated with produce quality, mainly due to calibration, packing and postharvest handling in Macedonia. They strongly point out that observed field quality is excellent, but that after harvest the produce quality sharply deteriorates, resulting in poor end product quality.

Some wholesale buyers also indicated of having problems with suppliers trying to cheat in quantity or quality, only the top layers of packaged goods being of type agreed upon.

Hand Calibration – Zagreb Wholesale Market (Dec 2008)

These buyers stressed problems associated with poor postharvest handling, lack of calibration, poor packaging, breach of contract terms as major impediments towards expanding the market for Macedonian tomatoes, bell peppers, cucumbers, cabbage and watermelons

Maybe one indicative comment from Croatian wholesale buyers is:"Macedonians need to realize that times when everything sent North was sold, are over".

9. RECOMMENDATIONS FOR IMPROVING MACEDONIAN COMPETITIVENESS

Major issues that need to be addressed by Macedonian fresh produce suppliers are:

1) Improving postharvest handling;
2) Improving calibration/packaging of fresh produce;

3) Adhering to contract terms signed with Croatian buyers; and
4) Strengthen & promote Macedonian fresh produce brands.

APPENDIX A. – SEASONAL PRICES OF SELECTED FRESH PRODUCE

Table 16: Cabbage Monthly Sale Prices (HRK) – Open Markets

PRODUCT	MONTH	YEAR	SALES POINT	MIN. PRICE	MAX. PRICE	AVERAGE PRICE
CABBAGE-Red						
Cabbage red (kg)	1	2008	Open markets	3	15	7,99
Cabbage red (kg)	2	2008	Open markets	4	15	7,95
Cabbage red (kg)	3	2008	Open	4	15	8,58

			markets			
Cabbage red (kg)	4	2008	Open markets	4	15	8,66
Cabbage red (kg)	5	2008	Open markets	4	15	9,08
Cabbage red (kg)	6	2008	Open markets	4	15	8,84
Cabbage red (kg)	7	2008	Open markets	3	15	7,28
Cabbage red (kg)	8	2008	Open markets	3	10	6,95
Cabbage red (kg)	9	2008	Open markets	3	12	6,84
Cabbage red (kg)	10	2008	Open markets	3	12	6,51
Cabbage red (kg)	11	2008	Open markets	4	12	6,69
Cabbage red (kg)	12	2008	Open markets	4	12	6,33
CABBAGE-White						
Cabbage white (kg)	1	2008	Open markets	3	15	6,52
Cabbage white (kg)	2	2008	Open markets	3	15	6,34
Cabbage white (kg)	3	2008	Open markets	3	10	6,34
Cabbage white (kg)	4	2008	Open markets	3	15	7,46
Cabbage white (kg)	5	2008	Open markets	4	15	8,11
Cabbage white (kg)	6	2008	Open markets	3	12	6,52
Cabbage white (kg)	7	2008	Open markets	2	10	5,1
Cabbage white (kg)	8	2008	Open markets	2	10	4,84
Cabbage white (kg)	9	2008	Open markets	2	15	5,05
Cabbage white (kg)	10	2008	Open markets	1,5	10	4,46
Cabbage white (kg)	11	2008	Open markets	1,5	8	4,5
Cabbage white (kg)	12	2008	Open markets	1,5	10	4,78

Source: Croatian Market Information System (TISUP)

Table 17: Cucumbers Monthly Sale Prices (HRK) – Open Markets

PRODUCT	MONTH	YEAR	SALES POINT	MIN. PRICE	MAX. PRICE	AVERAGE PRICE
CUCUMBERS-Gherkins						
Cucumber small for souring (kg)	6	2008	Open markets	5	18	10,65
Cucumber small for souring (kg)	7	2008	Open markets	3	18	7,4
Cucumber small for souring (kg)	8	2008	Open markets	3	15	7,89
Cucumber small for souring (kg)	9	2008	Open markets	3	15	9,45
Cucumber small for souring (kg)	10	2008	Open markets	8	15	11,26
CUCUMBERS-Salad						
Cucumber large for salad (kg)	1	2008	Open markets	10	30	16,96
Cucumber large for salad (kg)	2	2008	Open markets	10	25	17,21
Cucumber large for salad (kg)	3	2008	Open markets	10	25	17,99
Cucumber large for salad (kg)	4	2008	Open markets	7	25	15,74
Cucumber large for salad (kg)	5	2008	Open markets	6	20	13,08
Cucumber large for salad (kg)	6	2008	Open markets	4	20	9,07
Cucumber large for salad (kg)	7	2008	Open markets	2	18	5,73
Cucumber large for salad (kg)	8	2008	Open markets	2	10	5,94
Cucumber large for salad (kg)	9	2008	Open markets	2	15	7,74
Cucumber large for salad (kg)	10	2008	Open markets	5	15	10,48
Cucumber large for salad (kg)	11	2008	Open markets	6	20	11,98
Cucumber large for salad (kg)	12	2008	Open markets	8	20	13,88

Source:TISUP

Table 18: Watermelon Monthly Sale Prices (HRK) – Open Markets

PRODUCT	MONTH	YEAR	SALES POINT	MIN. PRICE	MAX. PRICE	AVERAGE PRICE
WATERMELON						

Watermelon (kg)	5	2008	Open markets	8	25	15,04
Watermelon (kg)	6	2008	Open markets	4	15	8,74
Watermelon (kg)	7	2008	Open markets	2	10	4,5
Watermelon (kg)	8	2008	Open markets	1	10	3,37
Watermelon (kg)	9	2008	Open markets	1	6	3,44
Watermelon (kg)	10	2008	Open markets	2	5	3,36

Source:TISUP

Table 19: Bellpeppers Monthly Sale Prices (HRK) – Open Markets

PRODUCT	MONTH	YEAR	SALES POINT	MIN. PRICE	MAX. PRICE	AVERAGE PRICE
BELLPEPPER-Babura						
Pepper round shaped (kg)	1	2008	Open markets	15	35	25,95
Pepper round shaped (kg)	2	2008	Open markets	15	35	26,05
Pepper round shaped (kg)	3	2008	Open markets	15	40	26,97
Pepper round shaped (kg)	4	2008	Open markets	15	40	27,69
Pepper round shaped (kg)	5	2008	Open markets	15	40	27,86
Pepper round shaped (kg)	6	2008	Open markets	10	40	21,71
Pepper round shaped (kg)	7	2008	Open markets	4	40	12
Pepper round shaped (kg)	8	2008	Open markets	3	20	7,34
Pepper round shaped (kg)	9	2008	Open markets	3	20	7,53
Pepper round shaped (kg)	10	2008	Open markets	5	20	10,42
Pepper round shaped (kg)	11	2008	Open markets	6	20	11,84
Pepper round shaped (kg)	12	2008	Open markets	8	25	16,19
BELLPEPPER-Other						
Pepper other (kg)	1	2008	Open markets	15	30	24,61

Pepper other (kg)	2	2008	Open markets	15	30	23,89
Pepper other (kg)	3	2008	Open markets	15	40	24,21
Pepper other (kg)	4	2008	Open markets	18	45	27,94
Pepper other (kg)	5	2008	Open markets	18	40	28,75
Pepper other (kg)	6	2008	Open markets	10	35	21,58
Pepper other (kg)	7	2008	Open markets	4	30	15,8
Pepper other (kg)	8	2008	Open markets	3	30	11,32
Pepper other (kg)	9	2008	Open markets	3	26	9,93
Pepper other (kg)	10	2008	Open markets	5	26	13,69
Pepper other (kg)	11	2008	Open markets	6	25	14,04
Pepper other (kg)	12	2008	Open markets	6	28	16,98
BELLPEPPER - Rog						
Pepper long shaped (kg)	1	2008	Open markets	15	30	23,54
Pepper long shaped (kg)	2	2008	Open markets	14	35	22,65
Pepper long shaped (kg)	3	2008	Open markets	12	40	25,18
Pepper long shaped (kg)	4	2008	Open markets	15	40	26,14
Pepper long shaped (kg)	5	2008	Open markets	15	40	26,81
Pepper long shaped (kg)	6	2008	Open markets	10	40	22,58
Pepper long shaped (kg)	7	2008	Open markets	5	40	13,54
Pepper long shaped (kg)	8	2008	Open markets	4	20	8,47
Pepper long shaped (kg)	9	2008	Open markets	3	20	8,31
Pepper long shaped (kg)	10	2008	Open markets	6	20	10,46
Pepper long shaped (kg)	11	2008	Open markets	6	20	11,75
Pepper long shaped (kg)	12	2008	Open markets	10	25	16,76

Source:TISUP

Table 20: Tomato Monthly Sale Prices (HRK) – Open Markets

PRODUCT	MONTH	YEAR	SALES POINT	MIN. PRICE	MAX. PRICE	AVERAGE PRICE
TOMATO						
Tomato (kg)	1	2008	Open markets	10	30	18,5
Tomato (kg)	2	2008	Open markets	12	35	18,09
Tomato (kg)	3	2008	Open markets	10	30	17,94
Tomato (kg)	4	2008	Open markets	8	25	16,6
Tomato (kg)	5	2008	Open markets	8	30	16,65
Tomato (kg)	6	2008	Open markets	7	20	13,19
Tomato (kg)	7	2008	Open markets	3	20	8,29
Tomato (kg)	8	2008	Open markets	2	15	6,27
Tomato (kg)	9	2008	Open markets	1	15	6,65
Tomato (kg)	10	2008	Open markets	4	18	9,61
Tomato (kg)	11	2008	Open markets	5	18	11,53
Tomato (kg)	12	2008	Open markets	6	22	13,48

Source:TISUP

Table 21: Cabbage Monthly Sale Prices (HRK) – Retail Shops

Product	Month	Year	Sales Point	Min. Price	Max. Price	Average Price
CABBAGE - Red						
Cabbage red (kg)	1	2008	Retail shops	4,98	8,99	6,42
Cabbage red (kg)	2	2008	Retail shops	4,99	9,99	6,59
Cabbage red (kg)	3	2008	Retail shops	4,99	9,99	6,63
Cabbage red (kg)	4	2008	Retail shops	4,98	8	6,56
Cabbage red (kg)	5	2008	Retail shops	4,99	7,99	7,14
Cabbage red (kg)	6	2008	Retail shops	4,99	9,99	6,58
Cabbage red (kg)	7	2008	Retail shops	3,49	6,99	4,74
Cabbage red (kg)	8	2008	Retail shops	3,49	6,99	4,24
Cabbage red (kg)	9	2008	Retail shops	2,99	6,99	4,57

Cabbage red (kg)	10	2008	Retail shops	2,99	7,99	4,58
Cabbage red (kg)	11	2008	Retail shops	2,98	6,99	4,55
Cabbage red (kg)	12	2008	Retail shops	2,99	6,99	4,43
CABBAGE - White						
Cabbage white (kg)	1	2008	Retail shops	2,98	7	5,3
Cabbage white (kg)	2	2008	Retail shops	2,97	7	4,74
Cabbage white (kg)	3	2008	Retail shops	2,98	7	4,72
Cabbage white (kg)	4	2008	Retail shops	2,99	10,99	5,83
Cabbage white (kg)	5	2008	Retail shops	2,99	8	5,83
Cabbage white (kg)	6	2008	Retail shops	2	9,99	4,33
Cabbage white (kg)	7	2008	Retail shops	1,99	6,99	3,36
Cabbage white (kg)	8	2008	Retail shops	1,98	4,99	2,8
Cabbage white (kg)	9	2008	Retail shops	1	3,99	2,44
Cabbage white (kg)	10	2008	Retail shops	1,49	3,99	2,71
Cabbage white (kg)	11	2008	Retail shops	1,49	5,49	2,72
Cabbage white (kg)	12	2008	Retail shops	0,99	5,49	2,47

Source:TISUP

Table 22: Cucumber Monthly Sale Prices (HRK) – Retail Shops

Product	Month	Year	Sales Point	Min. Price	Max. Price	Average Price
CUCUMBERS - Salad						
Cucumber large for salad (kg)	1	2008	Retail shops	9,99	15,99	13,6
Cucumber large for salad (kg)	2	2008	Retail shops	11	18,99	14,43
Cucumber large for salad (kg)	3	2008	Retail shops	9,99	19,99	15,96
Cucumber large for salad (kg)	4	2008	Retail shops	6,99	17,99	12,19
Cucumber large for salad (kg)	5	2008	Retail shops	3,48	13,99	8,45
Cucumber large for salad (kg)	6	2008	Retail shops	3,48	7,9	5,37
Cucumber large for salad (kg)	7	2008	Retail shops	1,99	7,99	4,84
Cucumber large for salad (kg)	8	2008	Retail shops	2,99	9,99	6,79
Cucumber large for salad (kg)	9	2008	Retail shops	2,99	9	6,95
Cucumber large for salad (kg)	10	2008	Retail shops	3,99	14	9,87
Cucumber large for salad (kg)	11	2008	Retail shops	6,99	15,99	11,4
Cucumber large for salad (kg)	12	2008	Retail shops	6,99	19,99	14,11

Source:TISUP

Table 23: Watermelon Monthly Sale Prices (HRK) – Retail Shops

Product	Month	Year	Sales Point	Min. Price	Max. Price	Average Price
WATERMELON						
Watermelon (kg)	3	2008	Retail shops	9,99	10	10
Watermelon (kg)	4	2008	Retail shops	9	12,99	10,13
Watermelon (kg)	5	2008	Retail shops	5,99	11,99	9,01
Watermelon (kg)	6	2008	Retail shops	3,99	9,99	6,05
Watermelon (kg)	7	2008	Retail shops	1,98	9,99	3,38
Watermelon (kg)	8	2008	Retail shops	1,49	3,99	2,23
Watermelon (kg)	9	2008	Retail shops	1,2	4,99	2,82
Watermelon (kg)	10	2008	Retail shops	1,2	3,99	2,67

Source:TISUP

Table 24 Bellpepper Monthly Sale Prices (HRK) – Retail Shops

Product	Month	Year	Sales Point	Min. Price	Max. Price	Average Price
BELLPEPPER – Babura						
Pepper round shaped (kg)	1	2008	Retail shops	18	30	26,39
Pepper round shaped (kg)	2	2008	Retail shops	18	34,9	25,64
Pepper round shaped (kg)	3	2008	Retail shops	16	40	28,92
Pepper round shaped (kg)	4	2008	Retail shops	12	41,99	29,09
Pepper round shaped (kg)	5	2008	Retail shops	16	45	27,85
Pepper round shaped (kg)	6	2008	Retail shops	10	34,99	17,84
Pepper round shaped (kg)	7	2008	Retail shops	4,99	24,99	11,97
Pepper round shaped (kg)	8	2008	Retail shops	2,99	14,99	6,52
Pepper round shaped (kg)	9	2008	Retail shops	3,99	24,99	9,13
Pepper round shaped (kg)	10	2008	Retail shops	7,99	26,99	12,64
Pepper round shaped (kg)	11	2008	Retail shops	7,99	24,99	15,14
Pepper round shaped (kg)	12	2008	Retail shops	11,99	24,99	18,35
BELLPEPPER -Other						
Pepper other (kg)	1	2008	Retail shops	14,98	32,9	24,56
Pepper other (kg)	2	2008	Retail shops	12,99	32,9	22,97
Pepper other (kg)	3	2008	Retail shops	14,99	36,49	27,22
Pepper other (kg)	4	2008	Retail shops	14,99	39,99	28,47
Pepper other (kg)	5	2008	Retail shops	12,99	44,9	27,72
Pepper other (kg)	6	2008	Retail shops	9,49	34,99	24,08
Pepper other (kg)	7	2008	Retail shops	10	30	23,19
Pepper other (kg)	8	2008	Retail shops	10,99	29,9	20,91
Pepper other (kg)	9	2008	Retail shops	6,48	29,99	22,09
Pepper other (kg)	10	2008	Retail shops	12,49	29,99	22,7
Pepper other (kg)	11	2008	Retail shops	12,49	29,98	21,77
Pepper other (kg)	12	2008	Retail shops	12,98	29,99	22,13

BELLPEPPER - Rog						
Pepper long shaped (kg)	1	2008	Retail shops	17,99	29,9	23,38
Pepper long shaped (kg)	2	2008	Retail shops	16,49	35,9	23,43
Pepper long shaped (kg)	3	2008	Retail shops	14,99	30	24,41
Pepper long shaped (kg)	4	2008	Retail shops	14,99	34,99	26,21
Pepper long shaped (kg)	5	2008	Retail shops	15,9	34,99	25,56
Pepper long shaped (kg)	6	2008	Retail shops	8,99	28,99	20,84
Pepper long shaped (kg)	7	2008	Retail shops	8,99	22,9	15,65
Pepper long shaped (kg)	8	2008	Retail shops	3,99	14,99	7,6
Pepper long shaped (kg)	9	2008	Retail shops	3,99	14,99	7,89
Pepper long shaped (kg)	10	2008	Retail shops	7,99	14,99	10,14
Pepper long shaped (kg)	11	2008	Retail shops	7,99	14,99	11,12
paprika rog-pepper long shaped (kg)	12	2008	Retail shops	7,99	20	15,34

Source:TISUP

Table 25: Tomato Monthly Sale Prices (HRK) – Retail Shops

Product	Month	Year	Sales Point	Min. Price	Max. Price	Average Price
TOMATO						
Tomato (kg)	1	2008	Retail shops	9,99	32,99	16,91
Tomato (kg)	2	2008	Retail shops	9	32,99	15,96
Tomato (kg)	3	2008	Retail shops	8,98	29,98	15,78
Tomato (kg)	4	2008	Retail shops	9,99	24,99	13,89
Tomato (kg)	5	2008	Retail shops	7,99	24,99	13,28
Tomato (kg)	6	2008	Retail shops	7,49	19,99	10,91
Tomato (kg)	7	2008	Retail shops	5	19,99	9,32
Tomato (kg)	8	2008	Retail shops	1,99	14,99	7,05
Tomato (kg)	9	2008	Retail shops	1,99	14,99	6,97
Tomato (kg)	10	2008	Retail shops	4,99	15,99	10,42
Tomato (kg)	11	2008	Retail shops	7	19,99	12,37
Tomato (kg)	12	2008	Retail shops	7	19,99	13,32

Source:TISUP

Table 26: Cucumbers Monthly Sale Prices (HRK) – Wholesale Markets

PRODUCT	Month	Year	Sales Point	Min. Price	Max. Price	Average price
CUCUMBERS-Gherkins						
Cucumber small for souring (kg)	1	2008	Wholesale markets	10	15	12,25
Cucumber small for souring (kg)	2	2008	Wholesale markets	10	12	10,5
Cucumber small for souring (kg)	3	2008	Wholesale markets	10	10	10
Cucumber small for souring (kg)	4	2008	Wholesale markets	9	9	9
Cucumber small for souring (kg)	5	2008	Wholesale markets	10	10	10
Cucumber small for souring (kg)	7	2008	Wholesale markets	8	10	9
Cucumber small for souring (kg)	8	2008	Wholesale markets	2	10	5,83
Cucumber small for souring (kg)	9	2008	Wholesale markets	6	18	9,94
Cucumber small for souring (kg)	10	2008	Wholesale markets	6	13	10,5
CUCUMBERS-Salad						

Cucumber large for salad (kg)	1	2008	Wholesale markets	9	16	11,97
Cucumber large for salad (kg)	2	2008	Wholesale markets	9,5	15	11,58
Cucumber large for salad (kg)	3	2008	Wholesale markets	8	15	12,71
Cucumber large for salad (kg)	4	2008	Wholesale markets	7	15	10,85
Cucumber large for salad (kg)	5	2008	Wholesale markets	2,5	14	7,52
Cucumber large for salad (kg)	6	2008	Wholesale markets	2	8	4,17
Cucumber large for salad (kg)	7	2008	Wholesale markets	2	6	3,98
Cucumber large for salad (kg)	8	2008	Wholesale markets	2	9	5,34
Cucumber large for salad (kg)	9	2008	Wholesale markets	2,5	12	6,56
Cucumber large for salad (kg)	10	2008	Wholesale markets	5	12	8,68
Cucumber large for salad (kg)	11	2008	Wholesale markets	5	13,5	8,82
Cucumber large for salad (kg)	12	2008	Wholesale markets	5	15	10,87

Source:TISUP

Table 27: Cabbage Monthly Sale Prices (HRK) – Wholesale Markets

PRODUCT	Month	Year	Sales Point	Min. Price	Max. Price	Average price
CABBAGE-Red						
Cabbage red (kg)	1	2008	Wholesale markets	3	7	4,84
Cabbage red (kg)	2	2008	Wholesale markets	3,5	6	5,19
Cabbage red (kg)	3	2008	Wholesale markets	4	7	5,06
Cabbage red (kg)	4	2008	Wholesale markets	3	8	5,04
Cabbage red (kg)	5	2008	Wholesale markets	3,5	8	5,43
Cabbage red (kg)	6	2008	Wholesale markets	2	6	4,87
Cabbage red (kg)	7	2008	Wholesale markets	2,5	6	4,04
Cabbage red (kg)	8	2008	Wholesale markets	2,5	6	3,5
Cabbage red (kg)	9	2008	Wholesale markets	2,5	6	3,44

Cabbage red (kg)	10	2008	Wholesale markets	2,5	5	3,45
Cabbage red (kg)	11	2008	Wholesale markets	2,5	4	3,27
Cabbage red (kg)	12	2008	Wholesale markets	1,8	4	3,24
CABBAGE-White						
Cabbage white (kg)	1	2008	Wholesale markets	2	8	4,02
Cabbage white (kg)	2	2008	Wholesale markets	2,5	8	4,02
Cabbage white (kg)	3	2008	Wholesale markets	2,8	6	3,9
Cabbage white (kg)	4	2008	Wholesale markets	2,5	8	4,15
Cabbage white (kg)	5	2008	Wholesale markets	2	7	4,37
Cabbage white (kg)	6	2008	Wholesale markets	1,8	5	3,2
Cabbage white (kg)	7	2008	Wholesale markets	1	4	2,4
Cabbage white (kg)	8	2008	Wholesale markets	1,5	4	2,24
Cabbage white (kg)	9	2008	Wholesale markets	1,5	4	2,06
Cabbage white (kg)	10	2008	Wholesale markets	1	4	2,24
Cabbage white (kg)	11	2008	Wholesale markets	1,5	3,5	2,13
Cabbage white (kg)	12	2008	Wholesale markets	1,4	3	2,11

Source:TISUP

Table 28: Watermelons Monthly Sale Prices (HRK) – Wholesale Markets

PRODUCT	Month	Year	Sales Point	Min. Price	Max. Price	Average price
WATERMELONS						
Watermelon (kg)	5	2008	Wholesale markets	7	10,5	9,29
Watermelon (kg)	6	2008	Wholesale markets	2,5	10,5	5,69
Watermelon (kg)	7	2008	Wholesale markets	1	6	2,62
Watermelon (kg)	8	2008	Wholesale markets	1	3	1,7
Watermelon (kg)	9	2008	Wholesale markets	1	3,9	2,07
Watermelon (kg)	10	2008	Wholesale	1,5	2,5	1,98

			markets			

Table 29: Bellpeppers Monthly Sale Prices (HRK) – Wholesale Markets

PRODUCT	Month	Year	Sales Point	Min. Price	Max. Price	Average price
BELLPEPPERS - Babura						
Pepper round shaped (kg)	1	2008	Wholesale markets	14	26	21,27
Pepper round shaped (kg)	2	2008	Wholesale markets	10	29	19,47
Pepper round shaped (kg)	3	2008	Wholesale markets	18	30	25,48
Pepper round shaped (kg)	4	2008	Wholesale markets	15	30	24,91
Pepper round shaped (kg)	5	2008	Wholesale markets	15	35	23,18
Pepper round shaped (kg)	6	2008	Wholesale markets	7	22	12,36
Pepper round shaped (kg)	7	2008	Wholesale markets	4	17	8,47
Pepper round shaped (kg)	8	2008	Wholesale markets	2,8	11	5,05
Pepper round shaped (kg)	9	2008	Wholesale markets	3	11	6,77
Pepper round shaped (kg)	10	2008	Wholesale markets	5	14	9,51
Pepper round shaped (kg)	11	2008	Wholesale markets	7	17	10,83
Pepper round shaped (kg)	12	2008	Wholesale markets	8	20	15,82
BELLPEPPERS - Other						
Pepper other (kg)	1	2008	Wholesale markets	10	25	17,48
Pepper other (kg)	2	2008	Wholesale markets	14	25	17,44
Pepper other (kg)	3	2008	Wholesale markets	15	30	19,46
Pepper other (kg)	4	2008	Wholesale markets	14	25	21,53
Pepper other (kg)	5	2008	Wholesale markets	14	29,5	23,29
Pepper other (kg)	6	2008	Wholesale markets	8	30	16,75
Pepper other (kg)	7	2008	Wholesale markets	3	25	15
Pepper other (kg)	8	2008	Wholesale	4	20	11,75

			markets			
Pepper other (kg)	9	2008	Wholesale markets	4	20	11,91
Pepper other (kg)	10	2008	Wholesale markets	8	21	15,13
Pepper other (kg)	11	2008	Wholesale markets	7	21	15,05
Pepper other (kg)	12	2008	Wholesale markets	7	22	15,91
BELLPEPPERS - Rog						
Pepper long shaped (kg)	1	2008	Wholesale markets	12	22	17,95
Pepper long shaped (kg)	2	2008	Wholesale markets	15	23	18,43
Pepper long shaped (kg)	3	2008	Wholesale markets	15	25	20,72
Pepper long shaped (kg)	4	2008	Wholesale markets	15	28	21,52
Pepper long shaped (kg)	5	2008	Wholesale markets	12	26,5	19,81
Pepper long shaped (kg)	6	2008	Wholesale markets	7	22	14,69
Pepper long shaped (kg)	7	2008	Wholesale markets	5	18	11,08
Pepper long shaped (kg)	8	2008	Wholesale markets	3	9	6,23
Pepper long shaped (kg)	9	2008	Wholesale markets	3	15	6,93
Pepper long shaped (kg)	10	2008	Wholesale markets	6,5	14	9,23
Pepper long shaped (kg)	11	2008	Wholesale markets	7	14	9,13
Pepper long shaped (kg)	12	2008	Wholesale markets	8	20	15,68

Source:TISUP

Table 30: Tomato Monthly Sale Prices (HRK) – Wholesale Markets

PRODUCT	Month	Year	Sales Point	Min. Price	Max. Price	Average price
TOMATO						
Tomato (kg)	1	2008	Wholesale markets	8	18	13,12
Tomato (kg)	2	2008	Wholesale markets	9	16	11,76
Tomato (kg)	3	2008	Wholesale markets	9,5	16	12,28
Tomato (kg)	4	2008	Wholesale markets	8	15	12,01

Tomato (kg)	5	2008	Wholesale markets	7,5	19	12,15
Tomato (kg)	6	2008	Wholesale markets	3	18	8,07
Tomato (kg)	7	2008	Wholesale markets	2	9,5	5,28
Tomato (kg)	8	2008	Wholesale markets	2	8	4,8
Tomato (kg)	9	2008	Wholesale markets	2	10	5,26
Tomato (kg)	10	2008	Wholesale markets	3	11	8,06
Tomato (kg)	11	2008	Wholesale markets	5	13,5	8,74
Tomato (kg)	12	2008	Wholesale markets	5	14	9,99

Source:TISUP

APPENDIX B. – CONTACTED COMPANIES

Supermarkets:

1. Konzum – part of Agrokor Group
   Contacted: Mr. Stanko Ćosić-Dragan, Deputy Director of Fruits&Vegetables
   00385/1/2482-331

   Contact Person for Konzum in Macedonia: Mr. Blaž Vitanov
   Anska Reka Company/Valandovo
   070/214-251
   anskareka@yahoo.com

2. Billa – part of REWE Group
   Contact: Marin Buj, Head of Fresh Produce Procurement Dept.
   Billa Distribution Center – Sv. Helena
   m.buj@billa.hr
   00385/91/606-1372

3. Kaufland – German based Schwartz Group
   Contact: Marin Buj, Fresh Produce Department Head
   tomislav.klepac@kaufland.hr
   00385/1/2499-190

Cash&Carry:

1. METRO

   Contact: Zvonimir Malogajski, Fruit&Vegetables Department Head
   zvonimir.malogajski@metro-cc.hr
   00385/1/3444-403

Wholesale importers:

1. Ficula d.o.o.
   Contact: Saqip Ademi,
   gezim83@gmail.com
   00385/98/206-441

2. Trgo-Zvon d.o.o
   Contact: Dragan Planinić ,
   00385/1/2450-087
   00385/98/276-881

3. Usora-Trans d.o.o.
   Contact: Zoran Kulašević,
   bobi.usora@yahoo.com
   00385/1/2392-31

APPENDIX C. – SOURCES/INSTITUTIONS

1. Croatian Chamber of Commerce
2. Croatian Market Information System (TISUP)
3. State Statistical Bureau (SSB)

APPENDIX D. – FLOWPACK EXAMPLES