Dear Readers...

Modern agriculture is closely connected to important ethical and political issues nowadays, such as climate changes, environment pollution, use of genetically modified organisms in food production, growing energy crops to the detriment of reducing food-growing areas, and allocation of taxpayer's money. In today's society, there are more and more people that are not directly envolved in agriculture, but are deeply aware of its ambiguous role and non-diminishing importance. I am convinced that this awareness can be of help to all of us who have been extremely honoured to undertake the responsibility of designing and implementing the agricultural policy, and to perform this demanding task the way we are expected to do it.

The farmer will continue to be in the centre of our interest and we will help that farmer to be as closely connected to the society as possible. How to produce the right product, in the right amount and at the right time at a reasonable price, while at the same time the public expects agriculture to serve the environment and the farmer to play the role of the steward of land and agricultural area? We, at the Ministry of Agriculture, Fisheries and Rural Development, believe to have an answer to that major challenge of tomorrow.

When we choose political measures, we try to obtain a proper degree and harmony of the measures we use to increase competitive quality of domestic production, protect farmers' income, provide stabile and adequate offer of food on the market, increase institutional support of the sector and improve different aspects of the rural area. Apart from that, we are engaged in intensive preparations for the membership in the European Union, gradually building a policy framework identical to the one existing in the EU. We have accomplished a lot in a relatively short period of time, but there is much more work to be done as well. We believe that the secret of our success, of which we have no doubt, will be the cooperation of partners in decision making that prepare our agriculture, as well as our society in whole, for the significant change that the membership in the EU shall bring along. The level of Croatian integration in the EU is already extremely high. That is confirmed by the fact that approximately 60% of commercial trade is preformed with the EU countries. I am therefore convinced that the EU membership will ensure to the Croatian agriculture an even faster further building of the sector in accordance with the goals identical to those we ourselves stand for.

There will still be place in our agriculture in the future, as there it is today, for small, medium-sized and large farms. Of course, the land consolidation process in agriculture is stringently following its course all over the world, and Croatia is no exception. However, we are witnesses that even relatively small family farms, armed with knowledge and equipped with modern technology, that are continuing the tradition of food production in their own area, with a lot of love for their work, can be extremely competitive even in the most developed markets, and even meeting demands of such consumers that are the hardest to please. Such specialised small producers and service providers in Croatia are indeed present in the rural area, and there will be more and more of them. Why? Because small and medium-sized farms are the best guarantee of survival and sustainable development of creativity, knowledge and excellence of products and services.

Croatia has a strong food industry with a long tradition, within the regional framework, distinguished by highest food quality and safety standards, offering to the consumers in Croatia and abroad an abundance of top-quality and recognizable agricultural and food products.

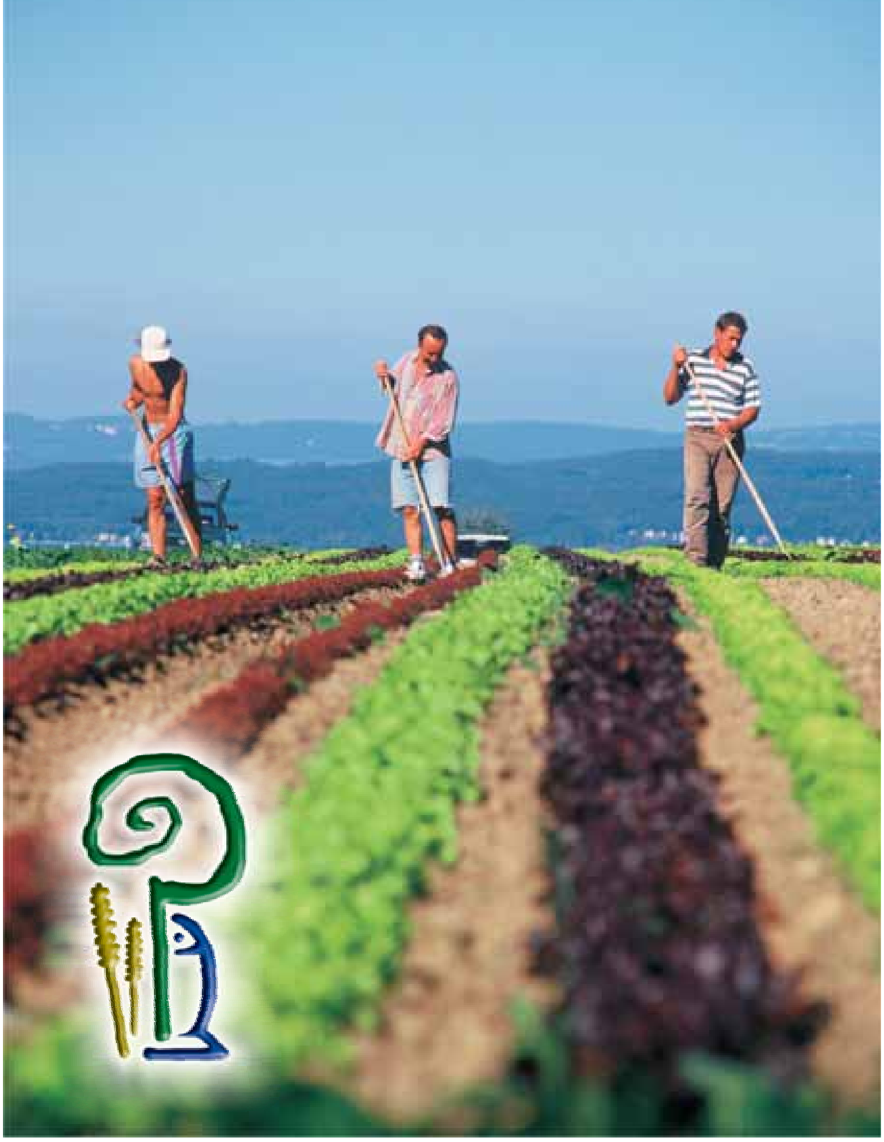
The best way to check the above statements is to visit us and try for yourselves some of the delicacies that Croatian agriculture has to offer, regardless of the part of Croatia you may choose to visit.

Dear readers, the booklet before you briefly describes the current situation in the Croatian agriculture and the measures that our Ministry, at the verge of the Croatian imminent membership in the European Union, is undertaking with the efforts to make agriculture and food production in Croatia, along with tourism, continuously distinguishing attributes of Croatia in the world.

Minister of Agriculture, Fisheries
and Rural Development of the Republic of Croatia
Božidar Pankretić, MSc


POLJOPRIVREDNE REGIJE I PODREGIJE HRVATSKE
(Agricultural regions and subregions of Croatia)
50 0 50 100 150 200 Km
P 4
P 3
PANONSKA
PANNONIAN REGION
P 1
P 2
GORSKA
G 1
MOUNTAINOUS
REGION
J 1
G 2
J 2
JADRANSKA
ADRIATIC REGION
J 3
LEGENDA (Legend)
Podregija (Subregion)
Regija (Region)
P 1 istočna (eastern)
P 2 središnja (central)
P 3 zapadna (western)
P 4 sjeverozapadna (northwest)
PANONSKA (PANNONIAN)
G 1 predplaninska (submountainous)
G 2 planinska (mountainous)
GORSKA (MOUNTAINOUS)
J 1 sjeverna (northern)
J 2 središnja (central)
J 3 južna (southern)
JADRANSKA (ADRIATIC)
Granica poljoprivrednih regija (regions)
Granica poljoprivrednih podregija (subregions)

CROATIAN AGRICULTURE



Contents

1. Geographical position

The Republic of Croatia is located at the crossroads of the routes which connect Central Europe and the Mediterranean and it stretches arch-like from the Danube in the north-east to Istria in the west and along the Adriatic coast to Konavle in the south-east. Croatia is distinguished by natural and climatic diversities which have made it a popular tourist destination but also provided it centuries-old diverse agricultural production. In Croatia's coastal area and on the islands, fishing and fish processing are of traditional importance. In the continental part of Croatia, for 120 years now, fish have been bred in fresh water ponds which are of high importance for the environment as the last habitats of endangered bird species.

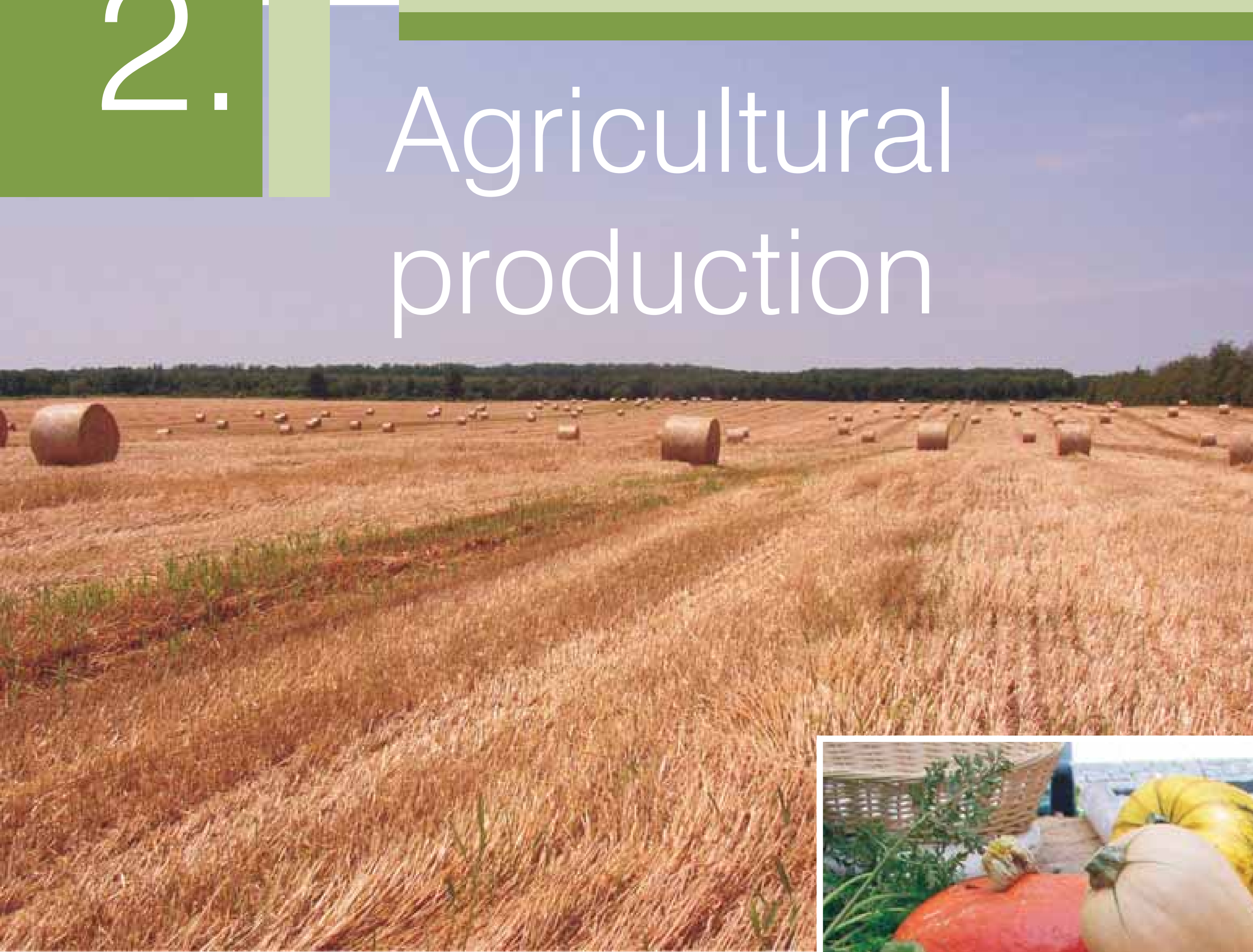
Croatian territory is divided into 3 large natural-geographic units:

- the **Pannonian and Sub-Pannonian area** which encompasses lowland and hilly parts of eastern and north-western Croatia. The largest part of the area is used for agricultural and livestock production.
- the **mountainous area** which separates Pannonian Croatia from its coastal part and offers great possibilities for eco-production and development of rural and winter tourism.
- the **Adriatic coast** which encompasses the narrow borderline coastal zone is separated from the background by high mountains. The Croatian Adriatic coast has more than 1000 islands and it is one of the most indented in Europe. A mild climate enables the production of Mediterranean cultures.

Croatia in numbers

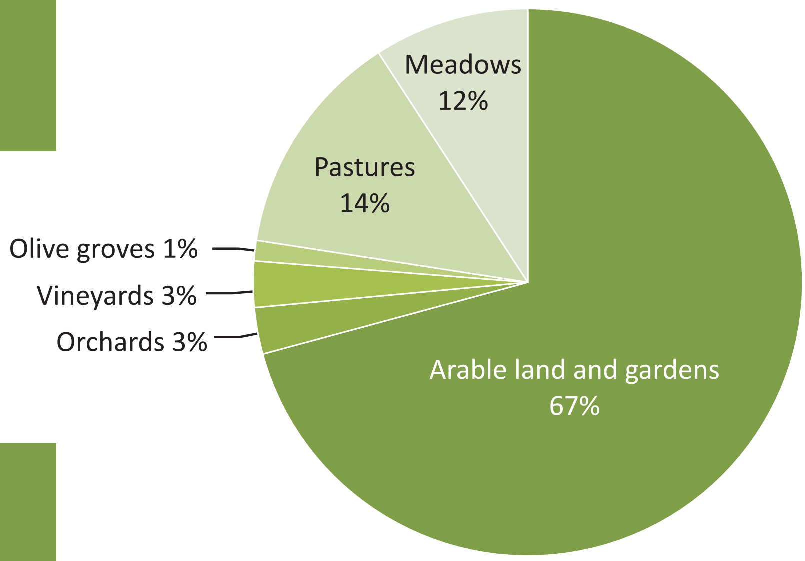
Total surface:	87 661 km²
Continental surface:	56 594 km²
Sea surface:	31 067 km²
Sea coast length:	5 835 km
Islands, cliffs and reefs:	1 185
Population:	4 437,460
Rural population:	47.6%
Population density:	78.5/ km²
Capital:	Zagreb
Official language:	Croatian
Currency:	kuna (100 lipa)
GDP per capita:	10 682 Euro
Forests:	44%
National parks:	8 (107 900 ha)
Nature parks:	10 (428 600 ha)
Sunny hours per year:	2 600

2. Agricultural production



Croatia has favourable agro-climatic conditions which enable diverse agricultural production. In a relatively narrow agricultural area, due to diverse climatic conditions, relief and soil, a large number of agricultural crops, starting from wheat and industrial crops to wine grapes and Mediterranean fruits and vegetables, are successfully cultivated. The farming structure consists mainly of small family farms which mostly produce for their own needs. Their share in market production is very low.

Out of the total of 190 thousand registered farms, 63% avail of less than three hectares of land. The power of medium to large farms (from 20 to 300 hectares), which own about 32% of agricultural land and whose importance for market sale is increasing, has been on the rise for the last ten years. However, the largest share of market production is focused on large farms which are also the ones which have been growing at a fastest rate in the last years. With the application of the latest technologies and extensive investments and knowledge, extraordinary production results have been achieved on some of these farms in global perspective.



Use of agricultural land according to land categories in the year 2008

The largest share of almost 1.3 million hectares of used agricultural land is located in Slavonia which is known as the Croatia's breadbasket and which is also where the largest share of total arable land is located. As regards the agricultural land structure, the mountainous area of central Croatia participates significantly with meadows and pastures, while the share of vineyards, olive groves and orchards to a certain extent is traditionally much greater in the coastal and island land than in the other agricultural regions.

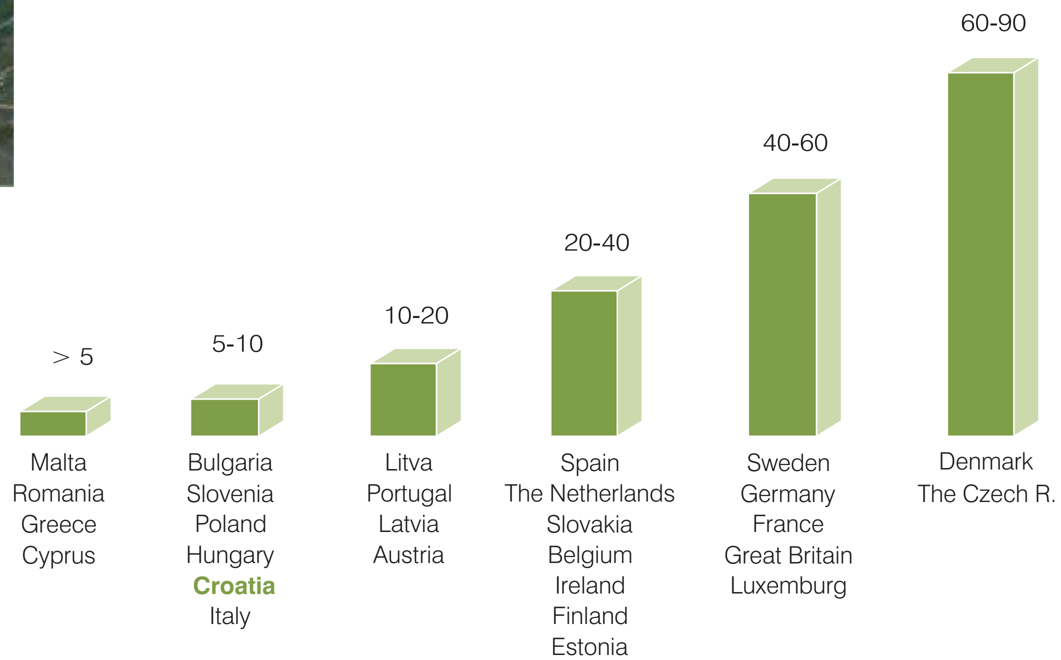
In relation to the EU countries, Croatia uses less agricultural land per farm, either on the basis of comparing commercial support beneficiaries or all farms. The above fact points to extensive fragmentation of farms which is still strong in Croatia and whereat the average commercial farm encompasses **8.5 ha** and the average of all farms only 2.9 ha. In proportion to Croatian population the country is relatively rich in agricultural land in European perspective. However, high potential of meadows and pastures is not used enough.

Structure of agricultural holdings and land 2009

	class (ha)				all holdings
	<3	>=3 i <20	>=20 i <100	>=100	
number of holdings	120.230	63.707	6.060	675	190.672
land (ha)	103.680	424.719	238.654	240.906	1.007.959
Ø size (ha)	0,9	6,7	39,4	356,9	5,3
holdings (%)	63,1	33,4	3,2	0,4	100,0
land (%)	10,3	42,1	23,7	23,9	100,0

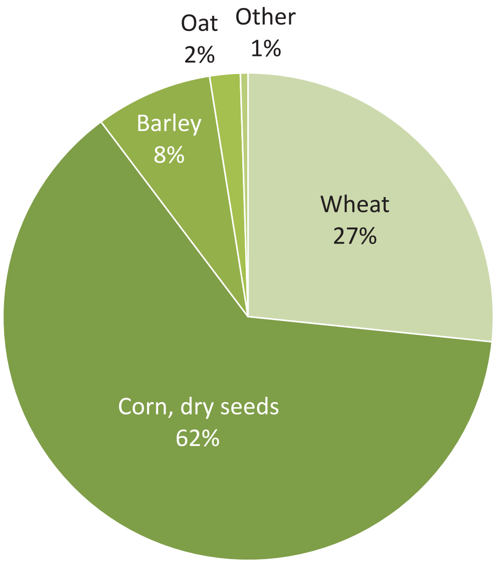
Source: Farm register, MAFRD, May 2009

Use of agricultural land per farm in the EU-27 and in the Republic of Croatia

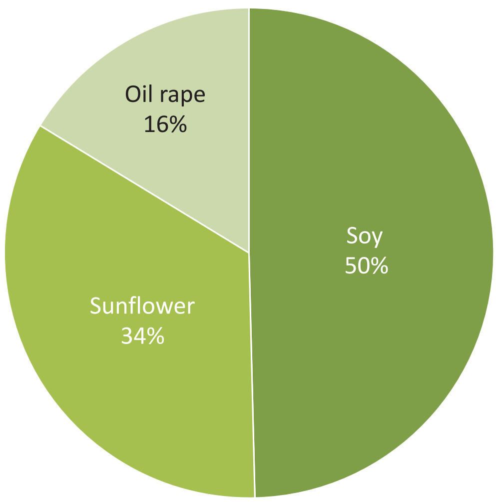


Plant production

In the total structure of agricultural production in Croatia, **cereal** production is the most significant. During the period of 2006-2008, an average of 559 hectares was under cereals and 3.1 million tons were produced at the average. **Corn** with 62% and **wheat** with 27% were dominant. For several years now, Croatia has been more than self-sufficient in the cereal sector and that mostly because the production of wheat is significantly larger than it is total domestic consumption. Croatia is a net cereal exporter. In the period of 2006-2008, 250 thousand tons of oil seeds (soy, sunflower, oil rape) were produced on 95 thousand hectares. Oil plants production covers less than 80 percent of domestic needs for raw vegetable oils and fats.



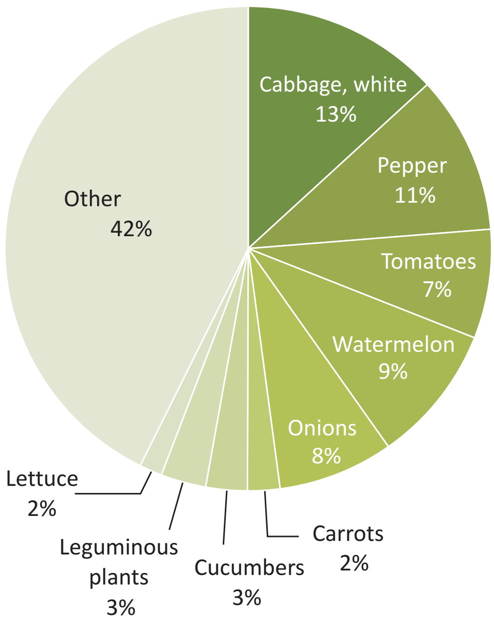
Ceral production structure, average for 2006-2008



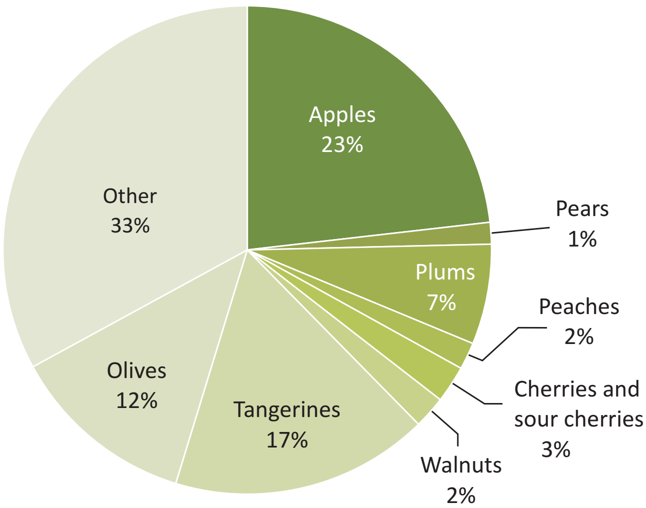
Oil plants production structure, average for 2006-2008

Vegetables and fruit production

Vegetable production structure, average for 2006 – 2008

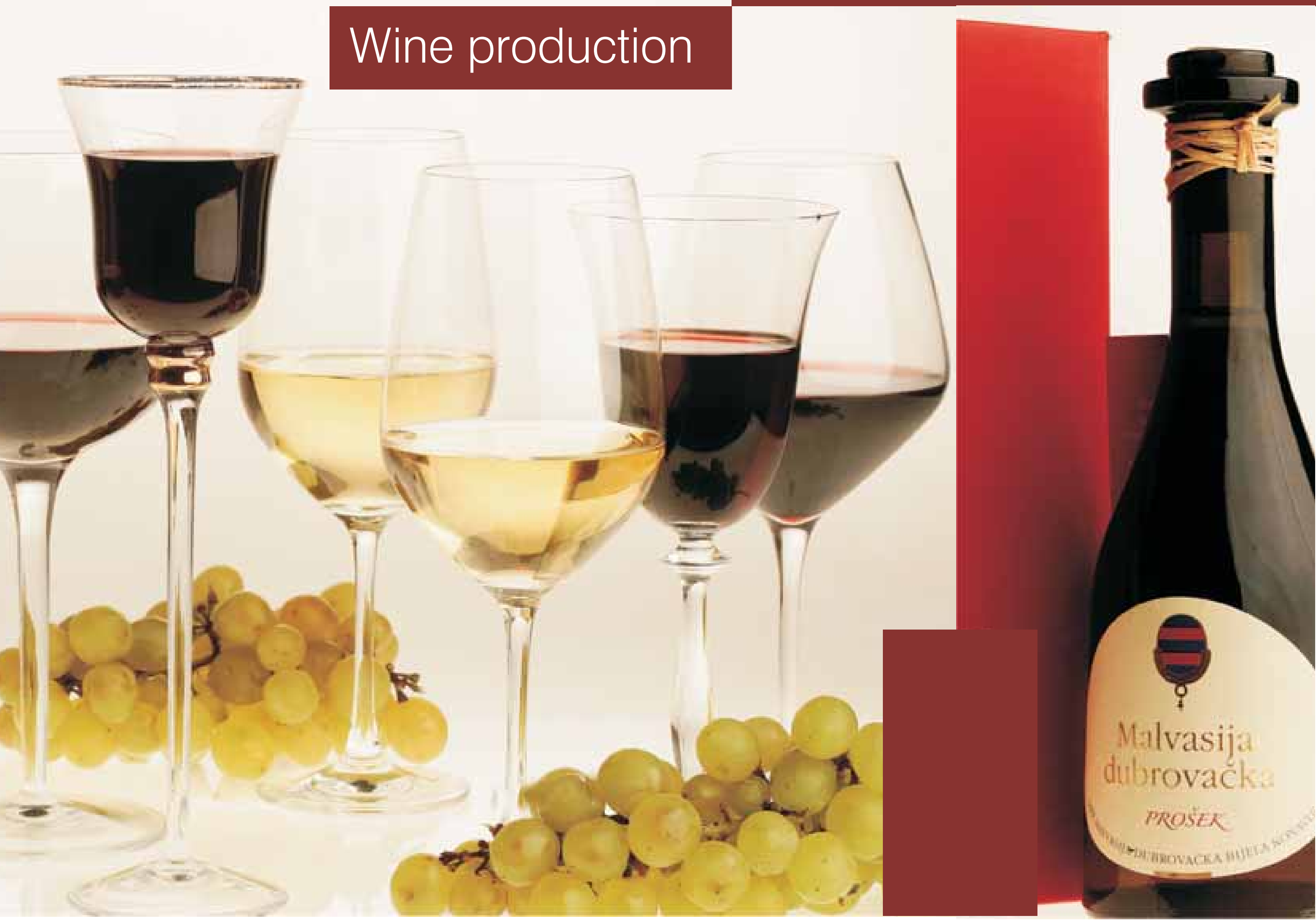


Fruit production structure, average for 2006 – 2008



Although extremely diverse and lately on a mild rise, **vegetable** and **fruit** production covers less than 2/3 of total consumption. As regards fruit, just as in most of the European countries, a significant share of total consumption is covered by import of tropical and sub-tropical fruit and so the self-sufficiency of production is significantly lower than with vegetables. **Apples** and **tangerines** are the most frequent types of fruit in domestic production with an average aggregate production of 103 thousand tons in the period of 2006 - 2008, and in the segment of vegetable production, the dominant sorts are **cabbage** and **paprika** with an average aggregate production of 70 thousand tons in the same period.

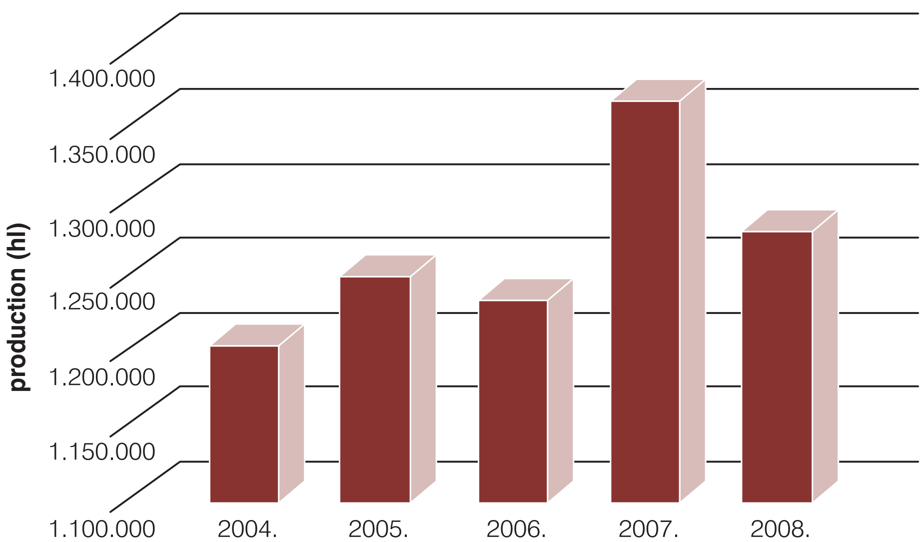
Wine production



Wine production in Croatia has a very long tradition. For decades now, wine growing has been by far the most important source of income for farmers in certain regions, and even today, statistically, most farms are registered as those with vineyards (about 150 thousand). More than 95% of them have surfaces up to half a hectare which shows that there are many farmers who are in the wine business out of pure love or hobby; a significant part of the consumption stays on the farm. The most frequent grape sorts are: **Graševina (Reisling Italico)***,* **Istrian malvasia** and **Plavac,** the aggregate share of which is 47 percent. The rest pertains to 28 sorts neither of which alone participates with more than 3 percent.

As regards natural conditions for growing wine grapes, two regions can be distinguished: the continental and the costal Croatia with a total of 13 sub-regions. For years, wine production has been about the same or higher than the consumption by domestic people which has been reduced by half in the last three decades. However, the increased

"Croatia grows 31 grape sorts of which Graševina, Istrian malvasia and Plavac are the most frequent."



Wine production in the period of 2004-2008

presence of wines with geographic origin, that is, the increase of wine quality, as well as higher consumer preferences regarding quality, has been a constant trend for the last 15 years or so. At first, this resulted in the expulsion from the market of those who could not follow the trend. Simultaneously, in addition to the renowned wineries, some of which have centuries-old traditions, with the implementation of top technology and lots of love and proficiency, a new generation originated on plantations with long family traditions: a generation of successful wine producers and family farms which come from all over Croatia. Although the production volume of these producers was relatively modest, they became indispensable in the offer of every good-quality restaurant as well as in retail, contributing to the richness of the Croatian wine atlas.
In the last years, the share of wine trade in relation to domestic production has significantly increased (the average share increased to 14% in the period of 2006-2008), whereat the import, as regards quantity, was several times higher than the export. However, average export prices of Croatian wines were approximately thrice as high as the prices of imported wines. Consumption of wines by tourists is an important segment of the total consumption.

Olive growing

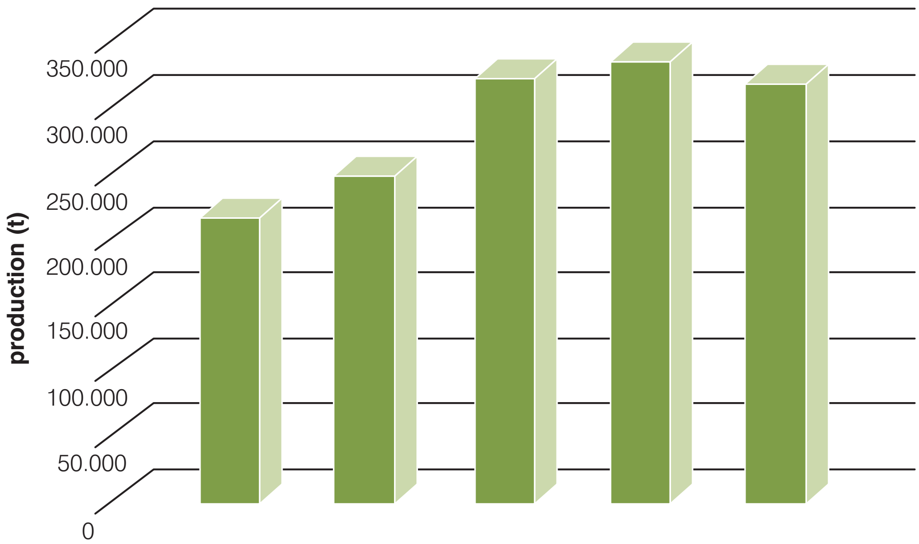
“The quality of olive oil from Croatian territory dates back to Roman times.”

As regards the number of employed farms (around 40 thousand), olive growing is one of the most present agricultural branches. Just as in wine growing, there is a large number of semisubsistance farms. The history of production is over two centuries old and the widely-known quality of olive oil from Croatian territory dates back to Roman times. Olive growing and wine growing have another common feature and that is that in comparison with the period before the Second World War, the number of olive trees was few times as higher than it is today .
The period of destruction of the olive groves and stagnation of their production lasted until some 15 years ago when a recovery ensued owing to, among other, systematic state aid programmes. Out of total olive oil production (average 60 thousand hl) direct consumption and direct sale on family farms is still the most important part. The positive trend of production expansion was also influenced by consumer awareness as regards the health and nutritional value of olive oil, especially in the last few years. The largest share of olive production belongs to the indigenous variety of "oblica" but there are also other domestic and foreign varieties. Although their production volume is modest, the inclusion of Croatian olive oils into top world olive oil catalogues in several competition categories has been a special prize for diligent Croatian olive farmers and Croatia was thus promoted as the country where one can really find what international experts assessed as a superior world-wide accomplishment.

Production of sugar beet and sugar

Sugar is Croatia's most significant export product of the last decade and its contribution to the overall trade is of special importance. Almost the entire export is realized onto the European Union markets.

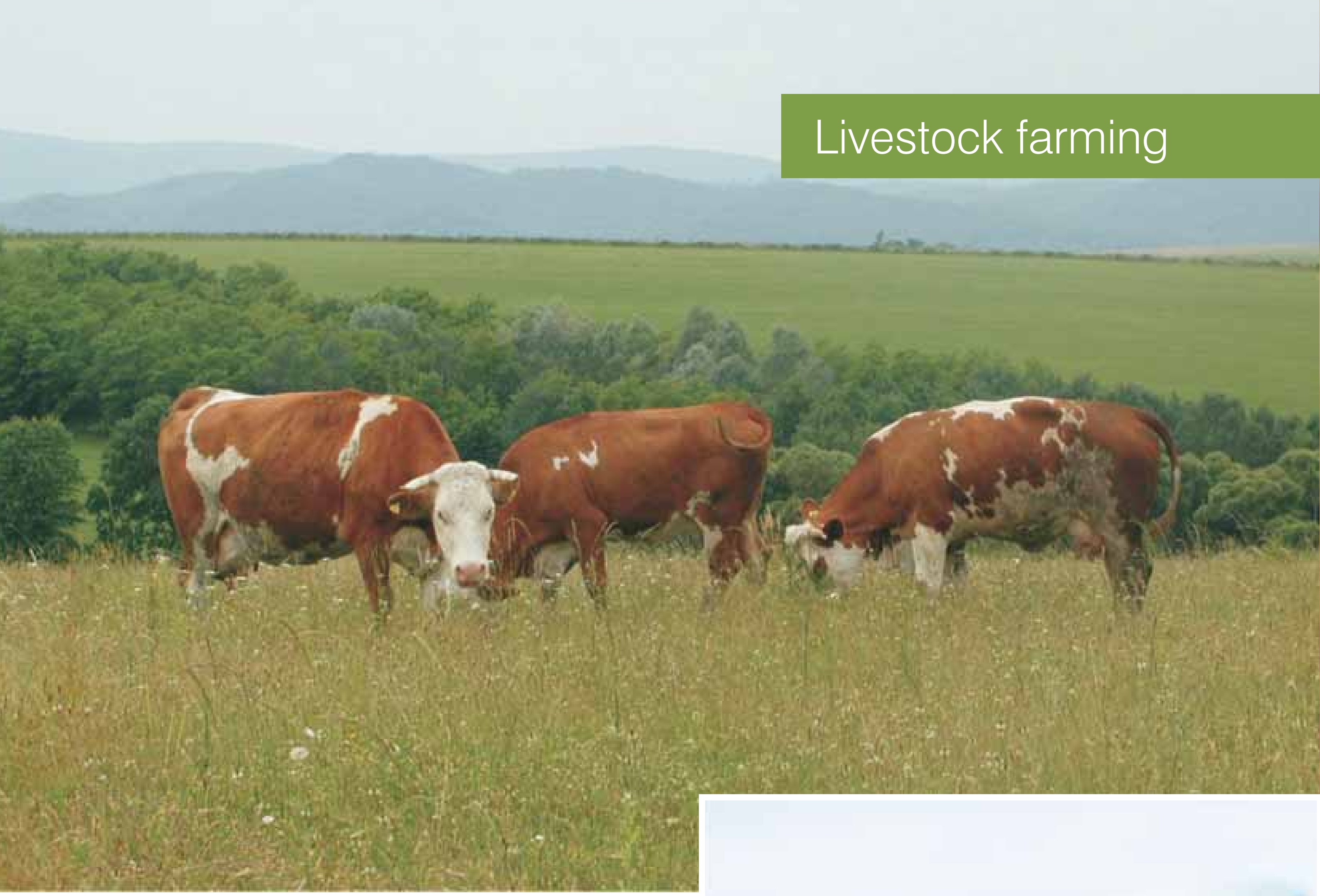
This is proof enough of the competitiveness of the Croatian production, within Europe of course, because on the global level the production from sugar cane is still much cheaper. The production of sugar beet is undertaken on some 30 thousand hectares and sugar is produced in three factories, partly from imported raw material as well which ensures optimum exploitation of the available resources. From the technological-agronomical aspect, the progress realized in the last 6 to 7 years in this sector is impressive. Within that period, sugar production increased by more than two and a half times per hectare and now amounts to about 9.5 tons. Should this trend continue, it could guarantee the sustainability of production which, just as the rest of the European sugar industry, will be exposed to extremely strong world competition after the full liberalization.



Sugar production in the period of 2004 – 2008

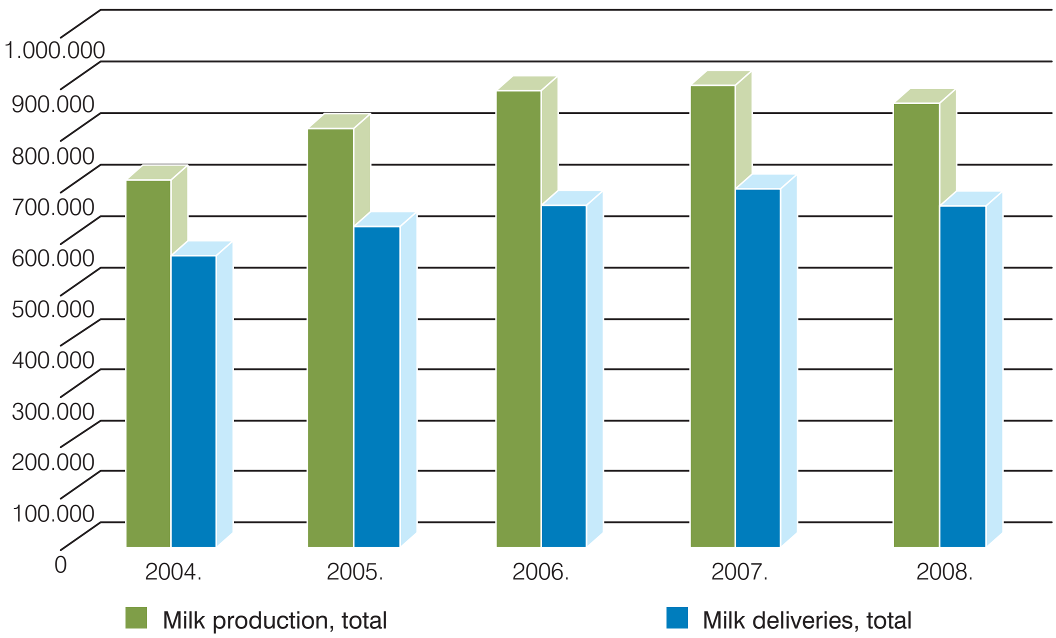
Sugar yield per harvested area was more then doubled over the last 5 years

Livestock farming



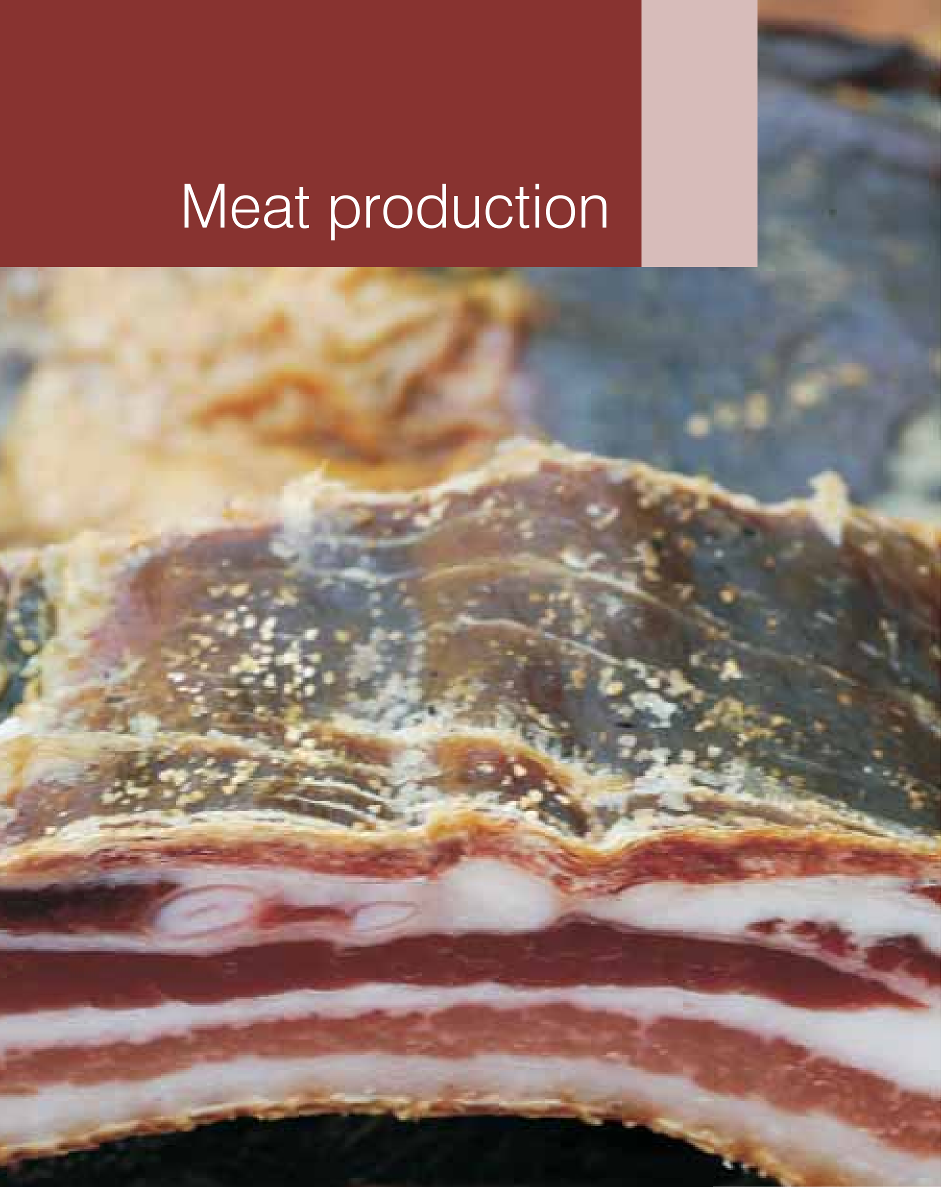
Livestock farming is present on the entire Croatian territory. The largest share of the production structure belongs to small family farms, whereat the importance of large production units, that is, of specialized farms in the market production has been rising fast in the last few years. **Cattle farming** is the most important branch of livestock farming, than pig farming follows as well as the significant poultry production and sheep and goat farming. Milk production forms the basis of cattle farming and meat production leans on it. In 2003, **milk** production was the subject of business of some more than 77 thousand farms with sizes of approximately only three cows. In the last years, there occurred a significant restructuring as regards the number of producers who supply milk for processing to dairy plants along with a significant increase of supplied milk per farm, especially in the category of the largest farms. The number of cows remained unchanged, and out of the 52,483 registered dairy farms in 2008, almost 92 percent were farms with up to 10 cows whereat their average size was somewhat less than three cows.

The remaining 4,411 farms were larger than 10 cows and their average size was 24.2 cows per farm. The dairy industry is concentrated in a similar manner, whereat out of 40 dairy producers, about 2/3 of the supplied and processed milk belong to the biggest two. Croatia is a net milk importer in spite of the continuous increase of production in the last decade because the production level of 20 years ago still has not been achieved. The greatest shift is however noticeable in the increase of quality of the purchased milk which is quickly getting close to the average EU quality. This is one of the segments into which the greatest funds have been invested in the last few years.



Production and supply of milk in the period of 2004- 2008

Meat production

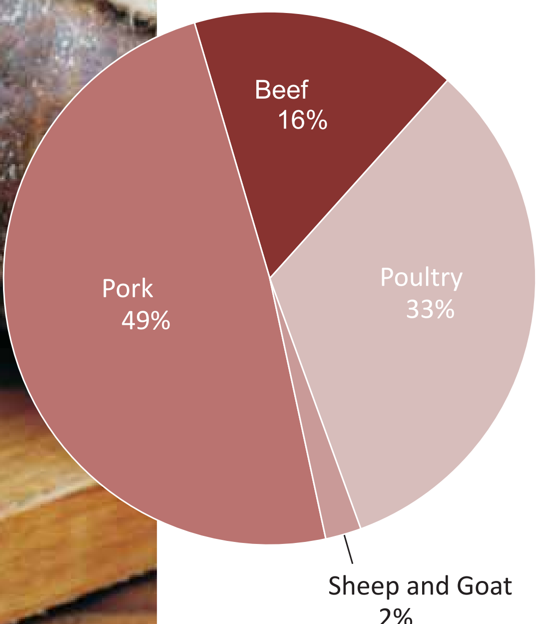


Two decades ago, beef production was the most important agricultural branch. Almost half of the production was exported to the EU markets, and the Croatian brand of **baby-beef** was widely known, especially on Mediterranean markets. In the first half of the '90ies, the number of cattle has been cut by half and it still less than 2/3 of the previous level. Breeding of the **Simmental** breed (about 78%), which is a double purpose breed (meat/milk), is dominant. Beside this breed, the dairy breed of **Holstein** (18%) and the brown cattle breed (3.5%) are used, while the other breeds are neglected as regards the number of heads.

The potential for the development of the **pig farming** production comes out of the strong domestic production of concentrated feeding stuffs and the tradition, while the main disadvantage is the extensive fragmentation of farms. **Poultry** production is at the highest level of the specialized production intended for the market.

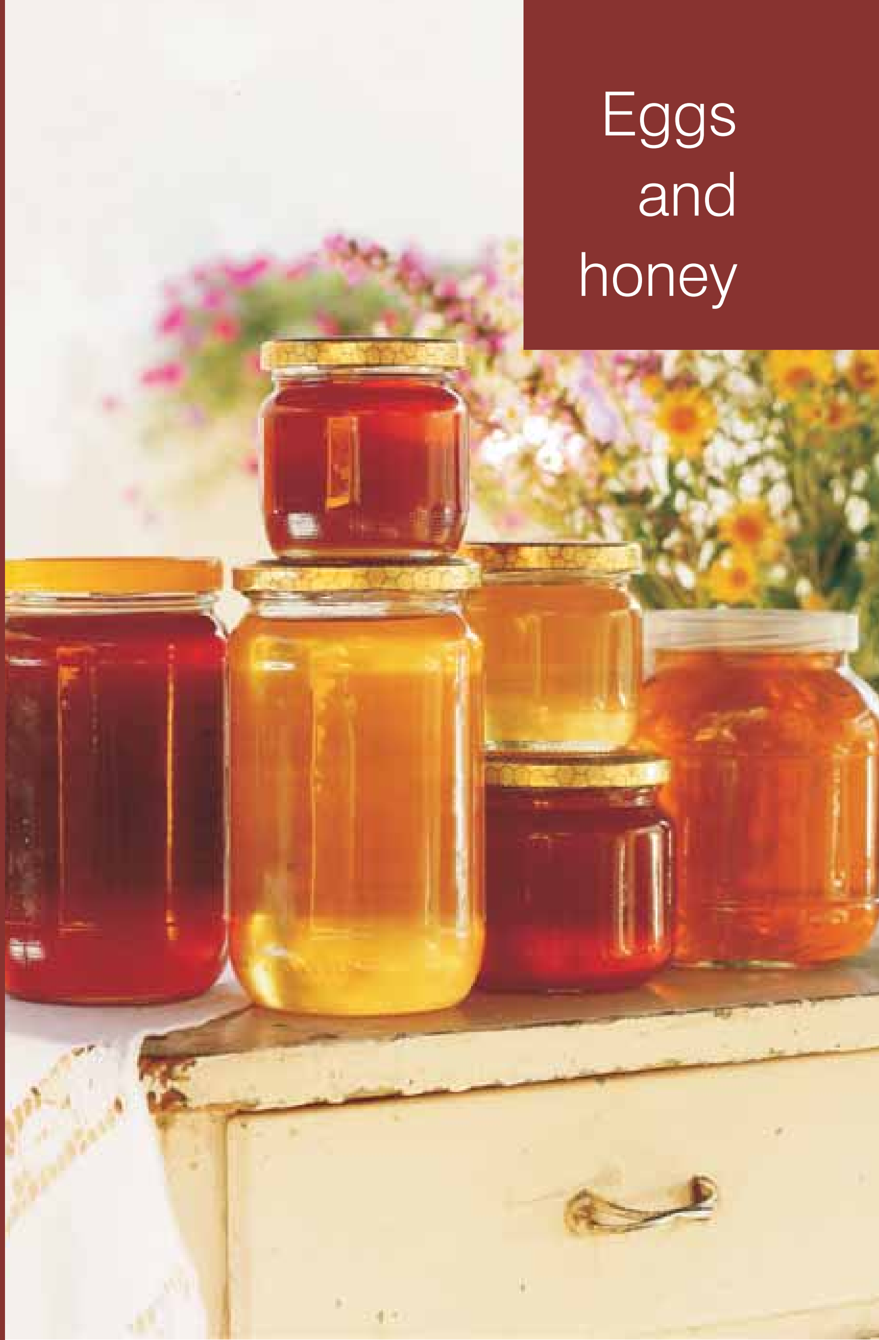
It is organized in large production units with the implementation of the latest technologies and the use of high-quality genetic basis of current hybrid lines in the production. Most of the sheep and goat production takes place in mountainous areas and on the islands, that is, in the less favoured areas. As much as 98% of the production is located on relatively small family farms of which almost 30 thousand are in sheep production.

In the meat consumption structure, following the production structure, the largest share pertains to pork, than poultry meat followed by beef, while the consumption of lamb and goat meat is the lowest. For all the above meat categories, Croatia is a net importer, whereat it comes closest to achieving self-sufficiency in the segment of poultry meat.



Meat production structure average for the period of 2006- 2008

Eggs and honey



About 48 thousand tons of **eggs** are produced annually in Croatia and this mostly covers domestic consumption. **Honey** production takes place almost exclusively on family farms. In the last years, the export of Croatian honey increased quite significantly and, as it is produced to a large extent in ecologically virgin areas, it is especially valued on the European market.

3. Fisheries and Aquaculture

Sea fishing

Fishery, along with tourism and agriculture, represents the main source of income of the coastal and especially island communities. Protection of fish resources is based mostly on the implementation of technical measures which include the minimum allowed catch sizes, fishing instruments features, spatial-temporal fishing limitations etc. Catch quotas are defined only for the **northern bluefin tuna** (ICCAT). Sea fishing is divided into: commercial, small, recreational and sport fishing. In the Republic of Croatia, there are currently about 3500 beneficiaries authorized for commercial fishing and their total catch in 2008 amounted to 48,500 tons. Out of that, as much as 85% pertains to the catch of small oily fish, while the catch by virtue of trawl nets amounted to 4,200 tons.

Sea fish catch in the period 2002- 2008

Year	Catch		Catch per category (t)		
	Tons	Index	Oily fish	White fish	Other
2002.	21.204	72,89	18.733	1.624	847
2003.	29.091	100,00	24.369	3.556	1.166
2004.	31.937	109,78	26.381	4.325	1.231
2005.	34.661	119,15	28.621	4.573	1.467
2006.	37.856	130,13	31.646	4.857	1.353
2007.	40.162	138,06	33.041	4.893	2.228
2008.	49.006	168,46	42.823	4.765	1.418

Mariculture

Croatia has extremely good possibilities for the development of mariculture. The mariculture of the Republic of Croatia includes the breeding of white fish, oily fish and shell fish. The total annual production amounts to about 12,000 tons of the total value of about 120 million euro. The **European sea bass** (*Dicentrarchus labrax*) and the **gilthead sea bream** (*Sparus aurata*) are dominant in the breeding of white fish and that in the quantities of about 4,000 tons per year. At the same time, the Croatian hatcheries produce about 20 million pieces of European sea bass and gilthead sea breams per year. Breeding of oily fish implies the breeding of **tuna** (*Thunnus thynnus*) in floating cages on semi-protected and open areas of the Middle Adriatic. The breeding is based on the catch of small-size tuna from the nature (8-10 kilos) and their further breeding up to the market size (30 kilos). Annual production amounts to about 5,000 tons, of total value of 80 million euro, which mostly ends up on the Japanese market. The breeding of shell fish includes the breeding of **mussels** (*Mytilus galoprovincialis)* and **oysters** (*Ostrea edulis)* on "pergolar" ropes in specially controlled areas under continuous supervision. Annual production amounts to about 3,000 tons of mussels and about 2 million pieces of oysters.

Fresh water aquaculture

Breeding fresh water fish types is performed according to the natural conditions in two manners: breeding cold water (salmonide or **trout**) and breeding of warm water (cyprinid or **carp**) types. A total of 49 beneficiaries authorized for aquaculture are active in fresh water aquaculture (26 in the breeding of warm water types and 23 in the breeding of cold water types). The total production of freshwater fish in 2008 amounted to about 7,100 t of which about 60% pertain to the production of warm water types and the remaining part pertains to the breeding of cold water types. The most significant types in fresh water breeding are the carp (*Cyprinus carpio*), the grass carp (*Ctenopharyngodon idella*), the doctor fish (*Tinca tinca*), the cat fish (*Silurus glanis*), the European pikeperch (*Stizostedion lucioperca*), the northern pike (*Esox lucius*) and the rainbow trout (*Oncorhynchus mykiss*).

Freshwater fishery

Commercial fishery is undertaken on the rivers Danube and Sava. Over 40 thousand fishermen are active in sport fishery. 122 beneficiaries of fishing rights have fishing rights and they manage the waters based on management acts and annual plans. Fishing zones are prescribed for commercial and sport fisheries, and so are fishing instruments and equipment, catch quotas, management and delivery of catch lists, payment of fishing fees, as well as safety measures for the preservation of the fish fund.

Fishery support models

Within the Ministry of Agriculture, Fisheries and Rural Development, a number of mechanisms have been developed for the purpose of improvement and enhancement of business and better positioning of the entire fishery sector.
The budgetary resources are used for the implementation of fishery market support and structural support with a growing importance of the **structural** support measures in the last years and decrease of the share of market support. One of the significant schemes if the co-financing of selective breeding work in aquaculture the purpose of which is to form quality parent fish stocks and to condition them according to the specific needs of each type.

As of recently, the "Fish Pond Ecosystem Management Model" is being applied for the purpose of protecting the income of fishermen due to the limitations arising from the undertaking of business activity in the circumstances which require the protection of the fish ponds' biological and scenic diversity. An important aspect here is also the co-financing of projects of constructing whole-sale fish markets implemented by the Ministry as one of the co-founders and partners of local and regional governments and fishing cooperatives. EU pre-accession funds have also been used for this project. One of the aids is also the aid directed towards fishing cooperatives/associations for their establishment, their work and for further investments.

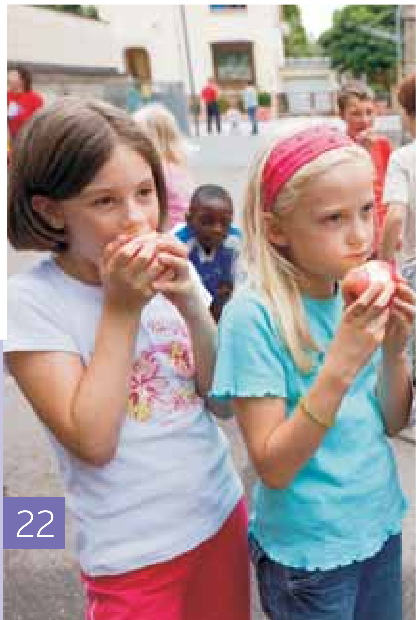
4. Food Safety and Consumer Protection

"Traceability from 'farm to fork'."

Consumers' growing expectations as regards food safety and food quality are becoming an increasing challenge for the producers, the legislators, non-governmental organizations and international trading partners. Citizens all over the world justifiably expect the food they consume to be safe and of high quality, but at the same time to be properly packaged and acceptable for consumption in different circumstances. Our country does not lag behind these trends.

The Republic of Croatia took over the EU *acquis communautaire* from the area of food safety ad the legal framework was established by adopting the Food Act which serves as the basis for insurance of a high level of protection of human health and consumer interest and for efficient market operation. An integrated approach to food safety **"from farm to fork"** has been introduced for the purpose of ensuring a high level of health safety and food quality, animal and plant health and protection throughout all the phases of food production, starting from the field, that is, the farm and all the way to the food on the table of the final consumer. Operators in the food business have prime responsibility for food in all the phases of production, processing and distribution which they control. According to the traceability principle, producers, processors or importers have to ensure that all the food, animal food and food ingredients may be traced throughout all the production phases and that the food on the market is properly labelled. An efficient system of formal controls is supported by a network of modern laboratories which guarantee the consumers a strict application of the hygiene, quality and labelling regulations.

"Croatia produces safe and high quality food."



Accession into the European Union

5.

The conclusion of the Stabilisation and Association Agreement in 2001 is considered to be the formal beginning of Croatian preparations for the future membership in the European Union. The SAA is considered as first document establishing the economic and political relationships between the Republic of Croatia and the European Union. Of special interest for the area of agriculture, are the provisions thereof which stipulate the conditions for the trade in agricultural, agri-food and fishery products, safeguard measures in trade, rules on the origin of goods, conditions for the use and obtainment of real estate in the Republic of Croatia, as well as the deadlines for the harmonization of the Croatian legislation with the legislation of the European Union.

The process of accession into the European Union was continued by submitting the request for membership in the year 2003, by achieving the EU **candidate status** in the year 2004, and by the formal opening of accession negotiations between Croatia and the EU on 3 October 2005.
As a candidate country for EU membership, Croatia is obligated to harmonize gradually with the *acquis communautaire* even before it becomes a member, whereat the Ministry of Agriculture, Fisheries and Rural Development is competent for the harmonization in 3 of the total of 35 chapters of the EU legislation (Chapter 11: Agriculture and Rural Development, Chapter 12: Food Safety, Veterinary and Phytosanitary Policy and Chapter 13: Fisheries). The other candidate countries' experience reveals that negotiations in agriculture are one of the most challenging tasks within the framework of preparations for accession into the EU, not only because of the large number of new regulations to be adopted and implemented, but also because of the specific role and sensitivity of the agricultural sector.

"Negotiations in agriculture are one of the most challenging tasks for public administration."

A few years ago, and especially during 2007 and 2008, the Ministry of Agriculture, Fisheries and Rural Development started, and continued during 2009, intense work on the adoption of a number of regulations from the area of agriculture, food safety, veterinary and phytosanitary policy and fisheries. The legislation harmonization process takes place according to the Government document which is adopted for each calendar year under the name of the **National Programme for the Accession of the Republic of Croatia into the European Union.** This document states all laws and secondary legislation to be adopted in that year and to be harmonized with the EU regulations, deadlines are provided for the adoption of each regulation of the given competent authority, and an overview of the other measures (adoption of plans or strategies, administrative enforcement, establishment of institutions, etc.) is also provided within the framework of the preparations for membership in the European Union.

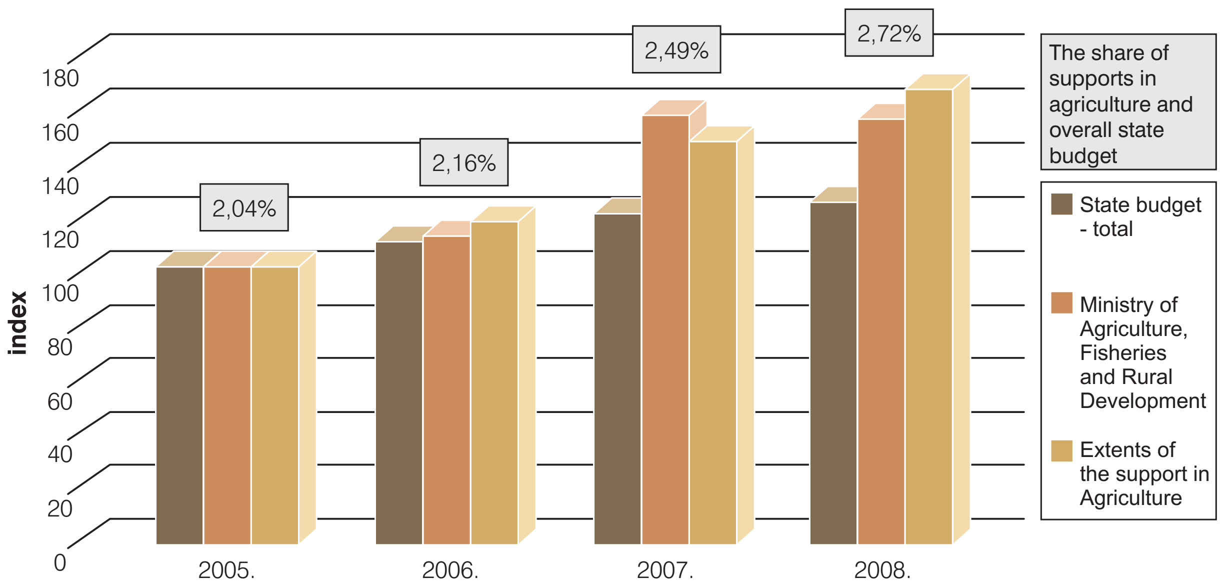
Part of those activities are undertaken within of the projects which are partly or completely financed from the European Union funds, that is, from the CARDS, PHARE, IPA and TAIEX programmes. The Ministry of Agriculture, Fisheries and Rural Development is the second largest beneficiary of the projects financed from these resources within the state administration, and priority areas for the approval of the projects are: the veterinary and phytosanitary segment, rural policy, the Paying agency for agriculture and fisheries. On the other hand, for the purpose of financing of their projects, farmers avail of the resources from the pre-accession SAPARD fund that, once it is completed by the end of 2009, will be replaced with the IPARD programme.

6. Adjustment of the Support System

“New agricultural support system.”

In the last few years, the agricultural budget grew at a quicker pace than the overall budget. That was necessary in order to ameliorate the effects of speedy market liberalization and create preconditions for a successful adjustment of the support model in which the coupled payment prevailed. In relation to the year 2005, agricultural support in 2008 increased by 65% while the total budget increased by 25%. The greatest increase was recorded in **structural support measures** which increased their shares from 8 to almost 19 percent in the last two years, while at the same time, the share of **market support** decreased from over 80 percent to 68 percent with the trend of further decrease.

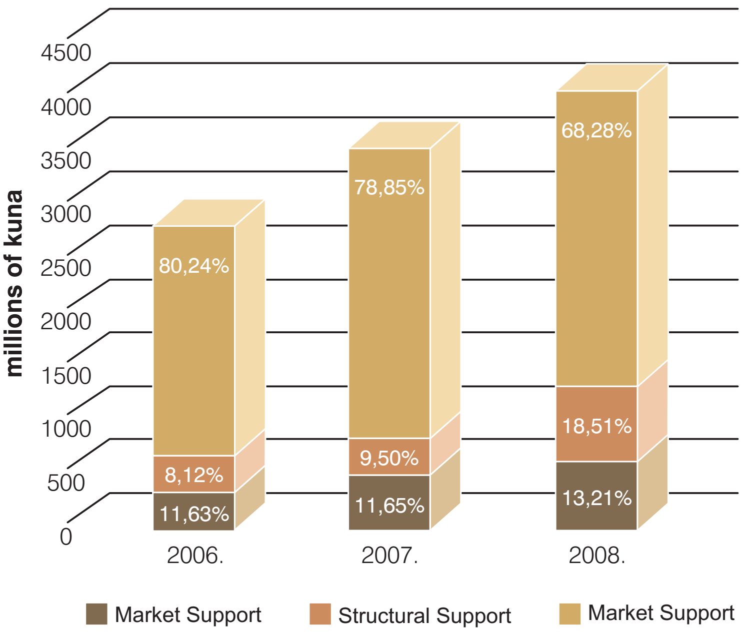
Within the coupled direct payments, some more than 60 percent relate to crop production, while the rest is intended for livestock production whereat the incentives for milk production have been individually the biggest budget item for a long number of years now.



Agricultural and overall state budget in the period of 2005-2008

One of the main goals of the support models is to reduce the negative and enhance the positive effects of future integration of the Republic of Croatia in the EU membership and inclusion into the Single market where the application of unique agricultural policies, especially in the segment of market-price measures, is mandatory. In the area of agricultural development, which will gradually become the central place of the Croatian agricultural policies, a speedy construction of the institutional framework and the qualification of a large number of farmers for the use of these measures will become important. During the pre-accession period, along with the growth of the budget for the second pillar, the share of the measures of this pillar (rural development) in relation to the first pillar (market measures and prices) will continue to increase. The goal is to achieve, by 2012, an average budget share of rural development similar to the share of the rural development measures in the overall agricultural support in member countries from the last two EU enlargements.
However, a much more important goal is the improvement of **absorption** capacities so as to replace certain negative effects of political adjustments in the area of direct payments by a timely and efficient use of EU structural funds.
Comparison with the EU countries shows that today Croatia is approximately in the middle when it comes to the extent of support per farm. Average support of about 3,850 euro per farm is lower than the average for the old member states where it amounts to approximately 6,000 euro but it is more than twice as high as the average support per farm in the new member states. The share of support beneficiaries in Croatia in relation to the total number of registered farms (47%) is somewhat lower than the average of the 12 new member states and significantly lower than the average of the old EU member states where the share of self-sufficient farms is also much lower.
The new system of Croatian state support in agriculture and rural development will enter into force in the second half of the year 2009. The greatest changes will apply to the **direct payments** system. With the new model, Croatian support comes significantly close to the model applied in the European Union. Several horizontal mechanisms necessary for the future implementation of direct payments in the EU will be introduced, and the new model serves to introduce gradual but important changes in the former structure of the support.
The new support system clearly defines key priority fields of activity in the rural areas compliant with the EU model with the goal of enhancing the competitiveness in agriculture, preservation and improvement of the environment and the landscape, improvement of life quality in rural areas and diversification of the rural economy.

"Diversification of rural areas."



The Structure of budgetary disbursements for agriculture in the period 2006-2008

"Enhancing the competitivness."

7. Rural Development

"Additional support to producers."

Rural area in Croatia encompasses almost **92% of the territory** on which almost half of the total population lives. The Croatian village is an integral part of the rich European tradition in which life in a rural community is one of the pillars of the historical and cultural identity and the heritage of each of its nations. After a few decades of faster prosperity of the urban area and extensive outflow of population from rural area to the cities, the second half of the 1990s was marked with a major concern within the Common Agricultural Policy towards the rural areas by designing systematic measures of the European rural development policy and ensuring a more significant budgetary support.

Even here in Croatia, at the beginning of this decade, there occurred a change in the perception as regards the rural development policies for which it is not sufficient only to ensure production supports for farmers. Very soon, a modern **legal framework** was adopted with set political goals which are also defined in the Agenda 2000 within the EU Common Agricultural Policy. However, only a few years ago there occurred an increase of the budgetary support for rural development measures which was very modest prior to that.

Rural and urban areas in Croatia, population and settlements according to the OECD criterion

Classification	OECD-criterion					
	km^2	%	Number of settlements	%	Population	%
Rural areas	51.872	91,6	6.001	88,7	2.110.988	47,6
Urban areas	4.731	8,4	763	11,3	2.326.472	52,4
Total	56.603	100	6.751	100	4.437460	100

Source: DZS, 2001.

“Preserving the cultural heritage.”

“Education for rural people. ”

The farmer is still in the centre of the rural development policy, but increased competitiveness in agriculture, although it is the most important, is no longer the only priority. Increase of competitiveness is undertaken by virtue of the model of support of investment intended for commercial farms. The initial 25% of the Ministry's budgetary support for investments in the first few years of the model's implementation increased at the beginning of 2008 to 40% for simple, that is, 50% for complex investments. This required a more significant increase of the budget and capacity building but the results of the model implementation were very good. For several years now, with the **capital investments** model, programmes for the preservation of traditional and protected breeds have been implemented successfully, as well as the support to marketing and promotional activities of agricultural-food products, and **the rural area development programme**. The former encourages the construction of physical and social infrastructure in the village, diversification of the agricultural activity with various programmes for the improvement of the farmers' education, producers' better professional connection and the improvement of the processing and direct sale on the farm.

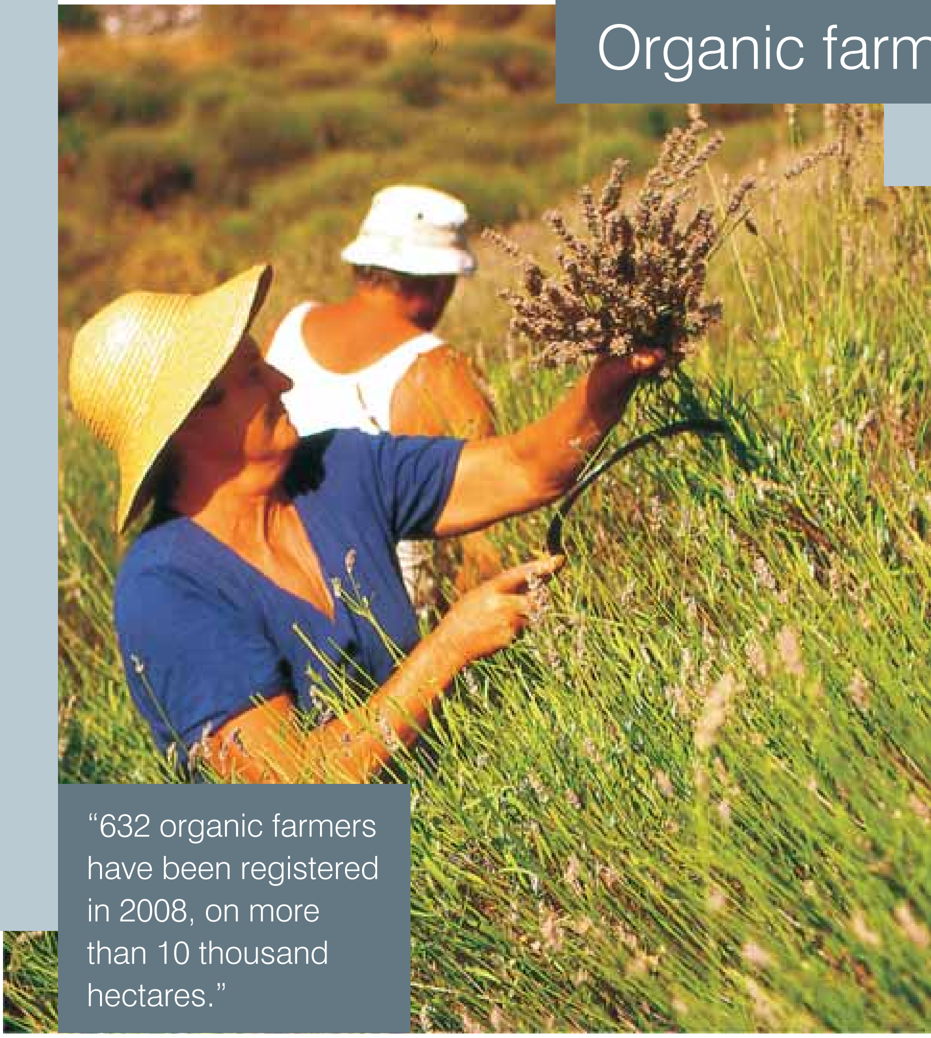
It is a well-known fact that agricultural production is difficult in certain areas because of unfavourable natural conditions. In Croatia, for a long number of years now, there has been additional support for producers who undertake their agricultural activity in **less favoured areas**. This primarily includes mountainous areas, the islands and the Pelješac peninsula, and the first and second group of special care areas.

In these areas, conditions favourable for state aids can be realized within the framework of certain agricultural programmes, including the right to higher amounts of certain coupled direct payments (milk, certain cattle breeds, multiannual crops). At the moment, some more than 50% of total surface is included in support programmes for less favoured areas in agriculture.

Currently, harmonization is under way of the existing legal framework with the newest legislation which will be mandatory for EU member states in the future so as to build, before the Croatia's entry into the EU, a framework based on which the implementation of this important horizontal rural development programme will be continued.

“Keeping the young people in the rural areas.”

Organic farming



"632 organic farmers have been registered in 2008, on more than 10 thousand hectares."

At the moment, in Croatia, there is certain inconsistency between the significance of organic farming on one hand (which stands out in all the strategic documents adopted in this decade) and actual numbers concerning the surfaces, production volume and numbers of eco-producers on the other hand, and these are still below the existing possibilities and potentials. A modern institutional and legal framework for the development of ecological production has been constructed, numerous producer educational and training programmes have been implemented, as well as marketing activities and production promotion for which it can already be confirmed that it has had the most accelerated and stable growth in the last few years and this growth will surely continue in the future period. There is another important matter which also contributes to this prediction. That is the growing awareness of the importance and significance of ecological production for the sustainable growth of agricultural production, for the preservation of biological diversity and the environment, for consumer health and satisfaction which gives traditional agriculture a completely new and positive dimension. Along with that, adequate cooperation and joint work of the state administration, non-governmental organizations, producer associations and the extension service guarantee further reinforcement of this production with extraordinary conditions exist. An additional reason for its growth in Croatian circumstances is the growing demand of the important world-wide tourist sector, the offer of which grants a special position to local domestic products produced by virtue of the best ecological practice.

In Croatia, at the moment, **organic farming is supported by additional 30%** of the amount of the incentive defined for conventional production. The new support model will serve to gradually harmonize the support system with the system applied in the EU, while, within the agricultural-environmental programme, even before the accession to the EU, one of the priority measures will be intended for the development of organic farming on agricultural farms. Data for the year 2008 show that 632 organic farmers were registered with more than 10 thousand hectares of agricultural surface included in the organic production. The **"organic-label"** is a guarantee that the product was produced according to the regulations on organic farming. The label is granted for a period of one year or one vegetative cycle and, together with the declaration, it certifies product quality. Award of the label is connected with a whole system both of the production and of the professional supervision and certification undertaken according to the highest international standards.

Rural tourism

"360 rural turism farms throughout Croatia have been registered so far."

Almost 60 million overnight stays realized by almost 10 million foreign tourists per year position Croatia among the most attractive European and world tourist destinations. What is increasingly appreciated by tourists is the well-cultivated and preserved rural landscape where, on family agricultural farms, various services are offered as well as superior domestic specialties produced in own **family farms**.

Such services will make their stay a unique experience and an opportunity for a superior vacation. That is what people usually call rural tourism from which farmers can draw additional income and improve the quality and diversity of the total tourist offer in the country. In the last several years, Croatia has been marching by large steps ahead as regards the offer of tourist services on farms. The fact that the greatest development of rural tourism was achieved in the areas in the direct vicinity of the most developed tourist destinations, primarily in Istria but also in the background of the city of Dubrovnik seems to be expected. However, today, in the entire Croatia, from Međimurje and Podravina in the north, Slavonia in the east, central Croatia, Lika and Gorski kotar in the mountainous area to the coastal area, the Neretva river valley and the islands, the number of farms on which tourist services and Croatian village products are offered is growing. At the moment, 360 of such farms are registered throughout Croatia. This activity is of special importance for small-size and middle-size agricultural farms which, by virtue of direct offer of value-added products on their farms, enhance their competitiveness and create a significant source of income.

EU pre-accession programmes and other international programmes

“Financial support of the European countries for easier harmonisation with EU standards.”

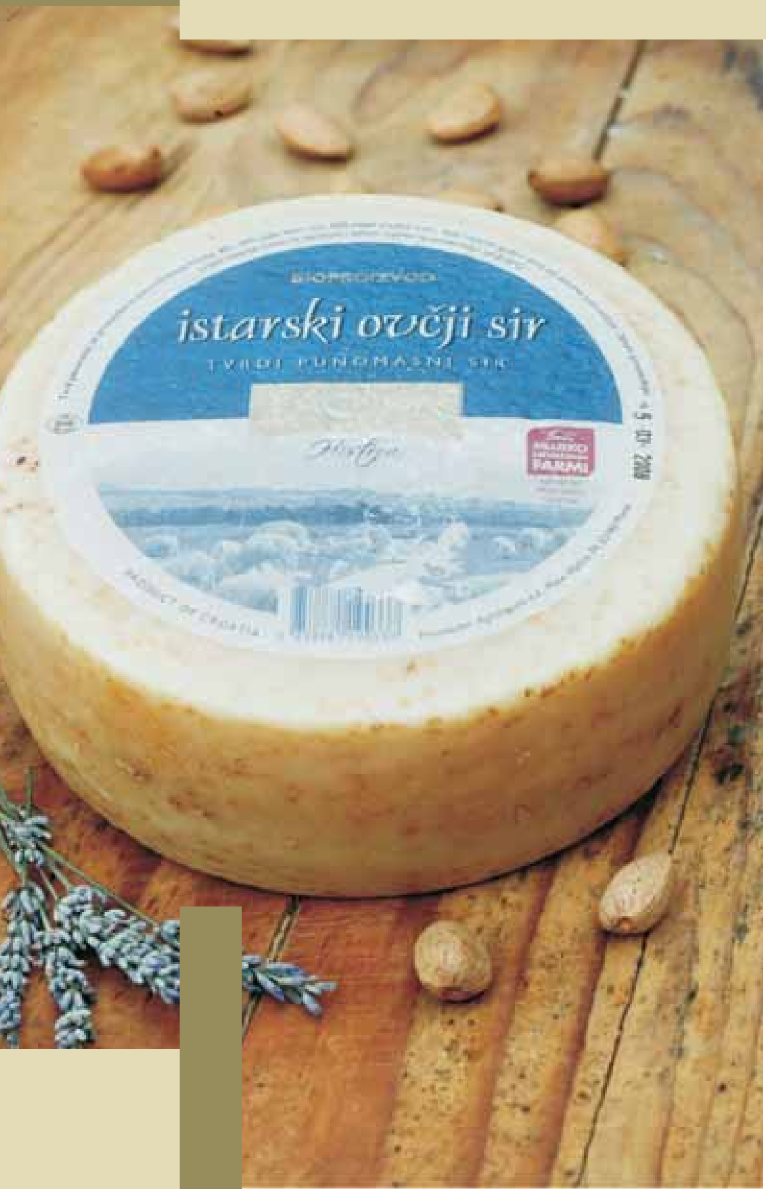
Croatia, just as the other candidate countries, was granted, during the last two enlargement rounds, the use of the pre-accession agricultural aid programme called **SAPARD**. 25 million euro was granted from the common EU budget for the programme period 2005-2006 and Croatia added another 8.3 million euro to this amount. The basic goal is to help farmers to adjust more smoothly to the requirements of market organization and standards which are applied in the EU. The SAPARD programme co-finances two measures: (1) investments into agricultural farms and (2) improvement of the processing and trading in agricultural and fish products. The estimate is that by the end of the programme in the second half of the year 2009, some 50 projects of total value of about 3 million kuna per project will be approved. After 2009, SAPARD will be replaced by the IPARD rural development aid programme which is designed as a component of the overall EU pre-accession aid instrument established for the programme period 2007-2010 of total value of 103 million euro. Based on the approved plan, the **IPARD** programme in the Republic of Croatia will be implemented according to three basic goals or strategic priorities:

1. Improvement of market efficiency and implementation of the Community's standards
2. Preparatory actions for the implementation of agricultural-environmental measures and local strategies
3. Development of rural economy

Besides the programmes financed by the EU, other rural community aid programmes are being implemented and these are financed from international sources the purpose of which is the farmers' easier adjustment to the application of new production standards and the adjustment to the requirements for EU membership.
Since 2008, the Pollution Control Project has been implemented in agriculture and it is financed by donation from the Global Environment Foundation in the amount of 5 million USD and it will last for 4 years. It is intended for the education of farmers and it will partially help reduce the costs of the implementation of ecologically acceptable practice which prevents water pollution. Within the four-year project of the World Bank (Legal and Institutional Harmonization with the EU *Acquis Communautaire*) which has been implemented by the Ministry since 2006, Croatia also avails of the valuable donation from the Dutch Government in the amount of 4 million euro, primarily for education and institutional construction.

In such way, 34 million euro was ensured for this project which is completely complementary with the EU aid programmes. It serves to capacity building for the implementation of the EU legislation in the area of food safety, veterinary and phytosanitary policy and rural development.

8. Croatian autochthon products



“Protection of Croatian national gastronomic treasures”

It is a well-known fact that traditional cuisine and indigenous food products contribute greatly to the richness of a nation. Just as the relatively small Croatian territory is the place where we can meet rich and diverse production of high-quality agricultural products, even greater richness can be found in Croatia when it comes to autochton domestic agricultural products and traditional meals made in a unique way. But this is no wonder after some insight into the rich Croatian history of which **folk cuisine** is an important segment. At the crossroads of important routes in this beautiful corner of Europe, the cuisine of the local Croatian people melted with impacts from the Mediterranean, mid-European and the cuisine of the neighbouring people on the Balkan Peninsula and all of this is woven into the Croatian heritage and represents inestimable wealth.

For a long number of years, at the National Intellectual Property Office, a number of agricultural products were protected: **Slavonski domaći kulen/kulin** (sausages), **Paški sir** (cheese), **Drniški pršut** (prosciutto), **Istarski pršut** (prosciutto), **Torkul maslinovo ulje** (olive oil), **Cetinski sir** (cheese), **Paški baškotin** (biscuit), **Slavonian šljivovica** (plum brandy) and the widely-known **Dingač** wine which was the first protected product from these areas. By adopting the Act on Designation of Originality, Designation of Geographical Origin and Designation of Traditional Reputation of Agricultural

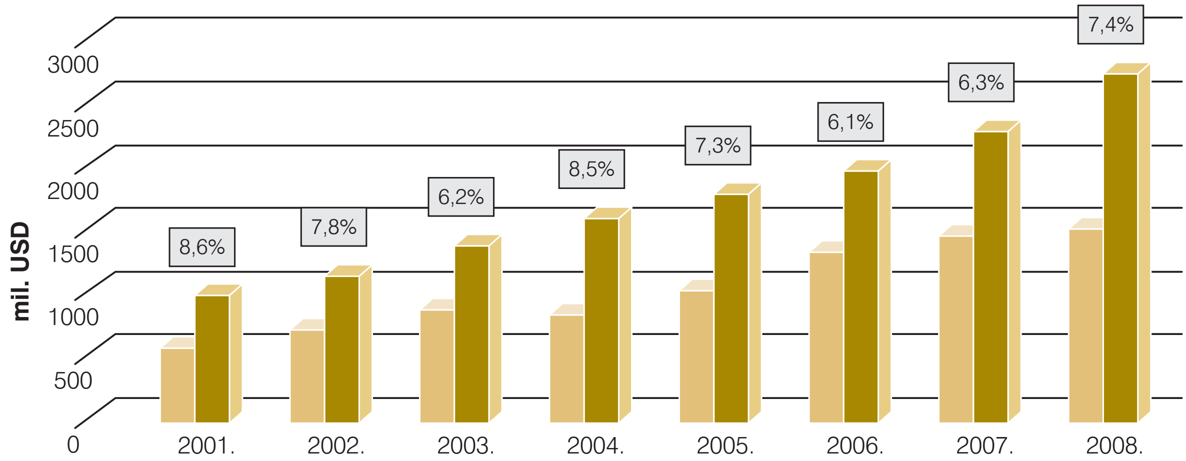
and Food Products from 2008, the harmonization of the basic legal framework with the EU framework was completed. After that, the process for registration of new products was opened as well as for repeated registration of already registered products. The process of registration of the first indigenous Croatian product according to the new and very demanding legal framework - the unique **sea salt of the island of Pag** has been completed recently. That process surely will not stop here. With the help of special programmes prepared for that purpose within the rural development measures, the producers will be able to register many other such products, and Croatia will surely make some more contributions to the rich European treasury by introducing its indigenous and traditional products for the consumers' pleasure and enjoyment - and these can be domestic people who are well acquainted with those products or foreign consumers or tourists who visit us and who will recognize their excellence.

Regardless of the production volume which is sometimes quite modest, each such product is of immeasurable importance for the contribution of the **gastronomic identity** of each country and the production of these is the best way to keep work positions in the rural areas.

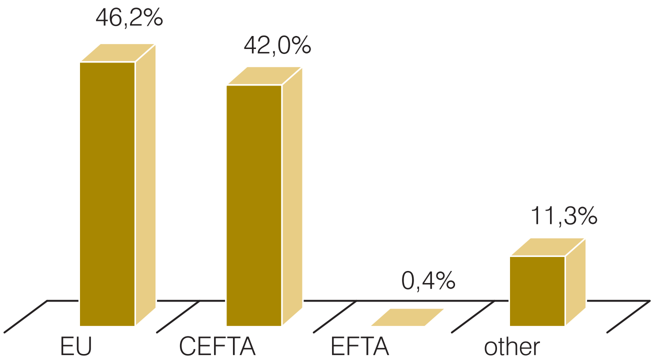
9. Agricultural Trade

Within the region, Croatia's agricultural trade is the most intensive and its volume in the period 2001-2008 tripled. It was a period in which the most important part of a branched net of the **free trade agreement** was built. In 2000, Croatia became a member of the World Trade Organization which also prompted trade. At the moment, free trade agreements are implemented with 39 partner countries with which 90 percent of the total trade is undertaken. Unlike non-agricultural trade which, according to such agreements, is completely liberalized with such trading partners, one part of the agricultural trade takes place by virtue of the application of a certain form of customs protection. During the last seven years, import and export grew at the same quick rate, and thus the trade balance tripled as well. The level of self-sufficiency fluctuated between 51 and 64 percent whereat in the last 15 years the coverage of import by export in agriculture was always significantly higher than for non-agricultural products. However, it is a known fact that Croatia is a country with an extremely strong tourist sector with an annual income over 7 billion euro which to the greatest extent compensates for the deficit in the total commodity trade.

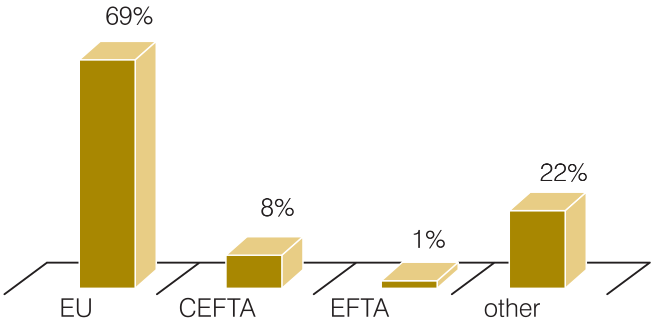
Croatian foreign agricultural trade in the period 2001-2008



In the structure of the total agricultural trade, trade with the **EU** prevails and it amounted to 2/3 of the total trade in the year 2008. Somewhat over 22 percent pertains to the CEFTA member states and somewhat over 19 percent to the other countries. In the last three years, the trade with **CEFTA**-partners grew at an especially quick rate and increased by as much as 67 percent, while the total trade increased by 30 percent. Within the CEFTA Group, Croatia realizes a surplus in the trade which amounted to 432 million USD in 2008, while at the same time, a trade deficit of 1,180 million USD was realized with the EU countries. Croatia exports agricultural product into 114 countries on all the continents whereat more than 90 percent pertain to the first 15 export destinations. On the other hand, in 2008, products originating from as much as 178 countries were present on the Croatian market. In this case as well, most of the import is concentrated on an insignificant number of countries, but not as insignificant as on the export side. The first 15 countries make up about 73 percent of the total import, whereat the aggregate of the import from the European Union countries amounts to almost 70 percent. Taken individually, Croatia realizes the greatest trade surplus with the neighbouring **Bosnia and Herzegovina** and **Japan** where the main Croatian export product is the northern bluefin tuna. Croatia has been realizing the greatest trade deficit in the last years with **Germany**, **Brazil**, **the Netherlands**, **Italy** and **Hungary**.

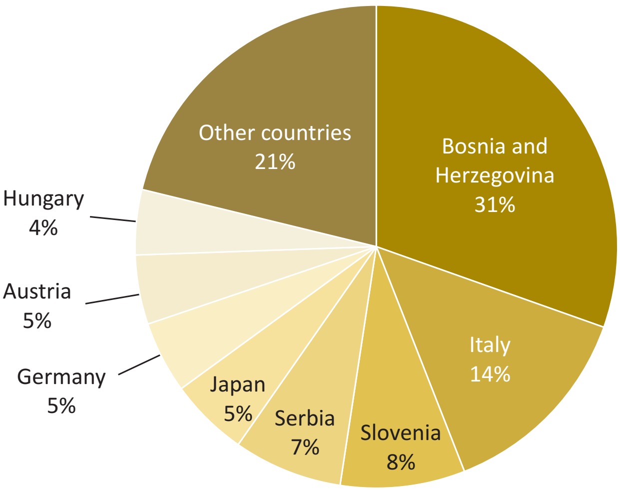


Croatian export structure per market in the period 2006 – 2008

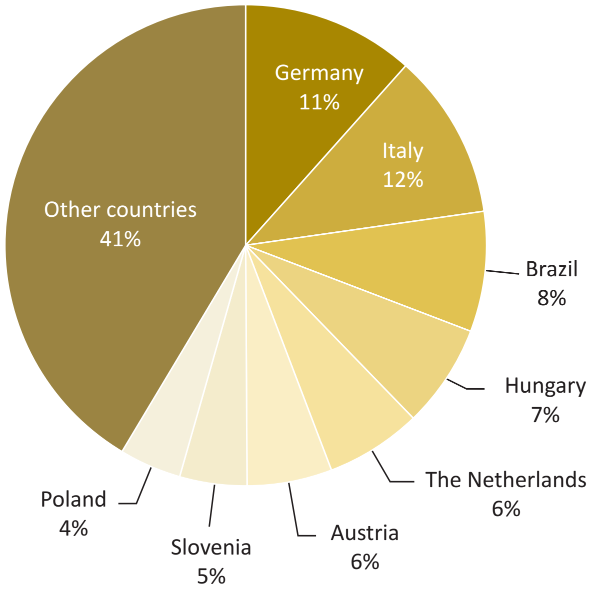


Croatian import structure per market in the period 2006 – 2008

Structure of Croatian export, average for the period 2006-2008



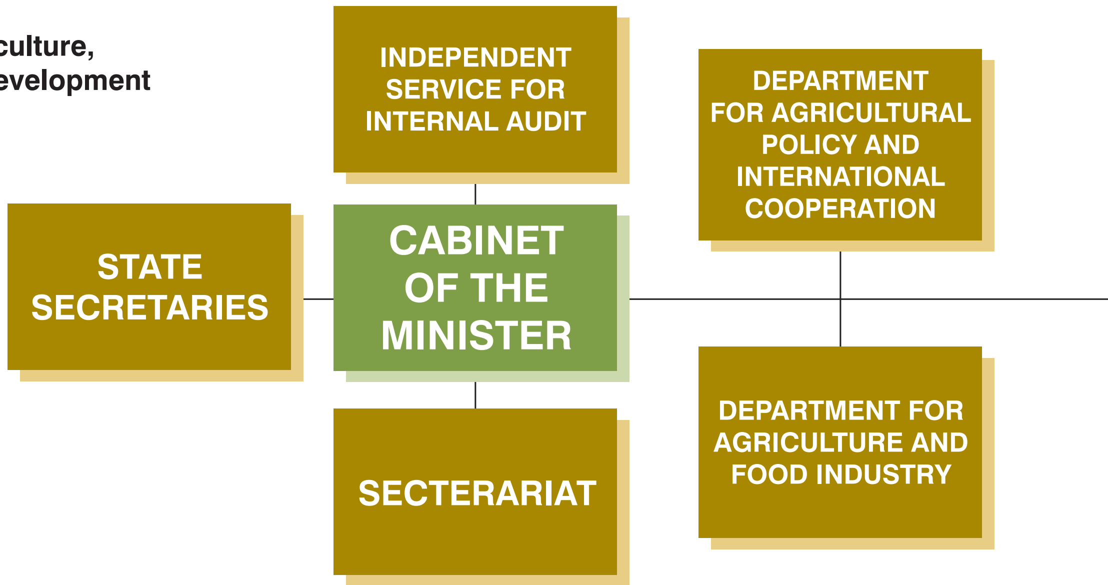
Structure of Croatian import, average for the period 2006-2008



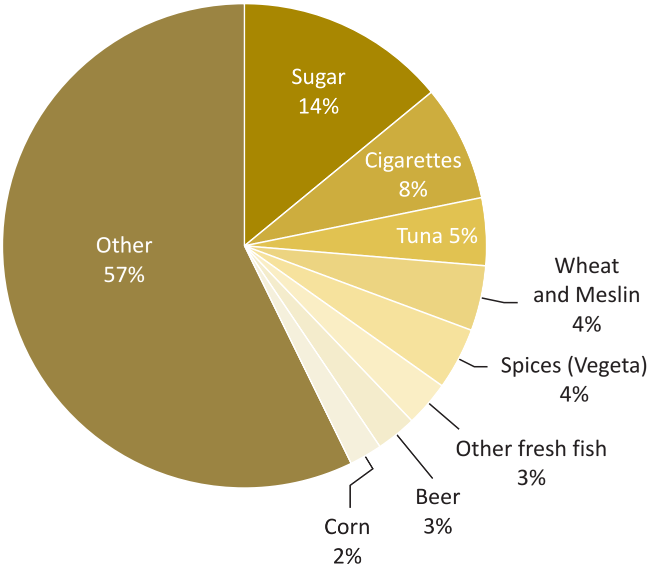
Food industry products are dominant in the structure of the Croatian agricultural export while primary products are less present. Among the 15 of the export products with the greatest shares according to the average value in the period 2006-2008, the only primary agricultural products were **wheat**, **corn** and **tangerines**. The first two positions have been occupied for years now by **sugar** and **cigarettes** the aggregate share of which in the total agricultural export often exceeded 1/4 of the total export, whereat in the last three years, the value of sugar and cigarettes amounted to approximately 290 million USD. The average value of **tuna** and other fresh fish exceeded 100 million USD which contributes to a positive balance of fisheries products trade. Within the group of spices, a unique and recognizable Croatian product of **Vegeta** can be found and its annual export value exceeds 55 million USD. This surpasses the value of the sale on the domestic market and points to a high level of international competitiveness of this segment of Croatian production.

Sugar is positioned first in the total Croatian import as well but its import value is much lower as well as its share in the total Croatian agricultural import. Generally, the concentration of the first 15 items in the total import is much lower, unlike in the export. Particularly, on the import side, products which are not in the group of the 15 most present products make up more than 2/3 of the total value of the import which points to an extremely heterogeneous import structure. At the same time, the most significant export items make up more than 53 percent of the total export value. Besides sugar, the following products are also in the group of the most significant both on the export side and on the import side: cocoa products, beer, biscuits and wafles, animal food preparations.

Organisational Sheme of the Ministry of Agriculture, Fisheries and Rural Development

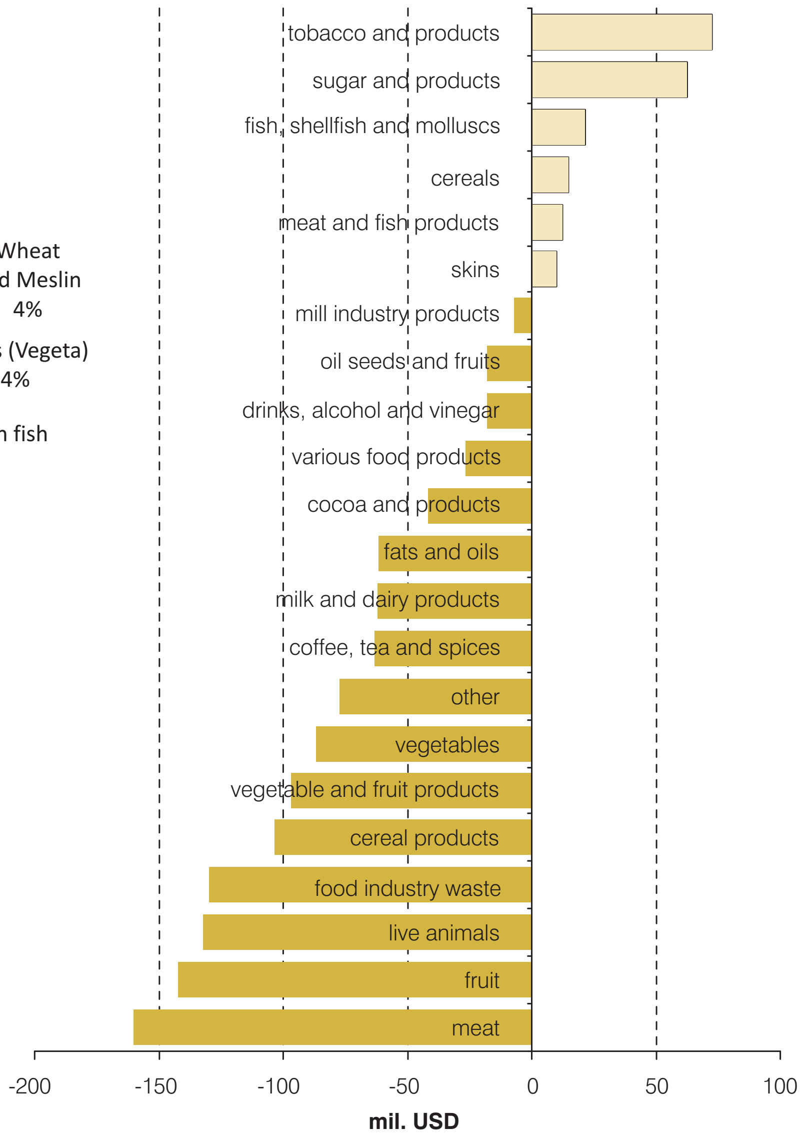


Croatian agricultural export structure per product, average for the period of 2006-2008

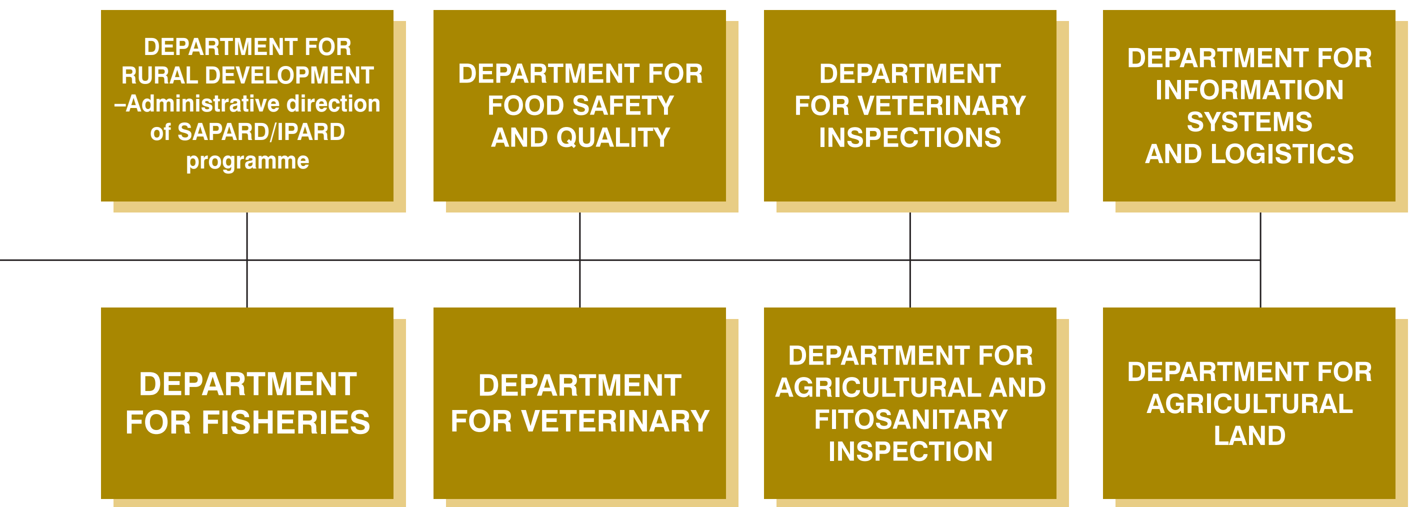


As regards the average **balance** of the Croatian trade value in the last two years, out of the 22 of the most important groups of agricultural products, only 6 groups have recorded a trade surplus. That average annual trade surplus is the highest in tobacco and products (approximately 73 million USD), than sugar and products (approximately 63 million USD), while the other four groups realized in the aggregate somewhat less than 60 million USD surplus (fish, cereals, meat and fish and cow hide products). At the same time, the greatest average annual deficit in the other 16 groups is recorded in the meat group (approximately 160 million USD), fruit (approximately 142 million USD), live animals (132 million USD), animal feeding stuffs and food industry waste (129 million USD) and cereal products (103 million USD).

Trade balance according to the most important agricultural product groups, average for 2007-2008



Note: Coverage of product groups of the HS:2 combined nomenclature (CN) besides the item "other" which encompasses less important groups: 05, 06, 13, 14, 29, 33, 35, 38, 43, 50, 51, 52 and 53.



Appendix

1. Farm structure and land in possession in 2009, by Counties

County		class (ha)					
		<3	>=3 i <20	>=20 i <100	>=100 i <1.500	>=1.500	All farms
Bjelovarsko-bilogorska	No. Farms	5.300	8.009	628	22	0	13.959
	ha	6.179	57.988	21.209	4.597	0	89.973
Brodsko-posavska	No. Farms	4.145	3.700	459	59	1	8.364
	ha	4.699	23.729	19.544	10.510	3.476	61.958
Dubrovačko-neretvanska	No. Farms	7.423	229	8	0	0	7.660
	ha	5.530	1.150	322	0	0	7.001
Grad Zagreb	No. Farms	4.302	1.107	46	13	0	5.468
	ha	3.514	6.255	1.532	4.088	0	15.391
Istarska	No. Farms	4.707	1.405	100	7	0	6.219
	ha	4.069	8.951	3.631	1.831	0	18.483
Karlovačka	No. Farms	3.329	3.018	81	4	0	6.432
	ha	2.788	19.771	2.863	865	0	26.287
Koprivničko-križevačka	No. Farms	4.451	7.461	408	12	0	12.332
	ha	5.851	51.941	14.078	4.734	0	76.605
Krapinsko-zagorska	No. Farms	6.226	1.399	7	6	3	7.641
	ha	6.121	6.935	216	4.353	5.976	23.602
Ličko-senjska	No. Farms	2.763	2.419	43	3	0	5.228
	ha	1.605	16.817	1.424	591	0	20.437
Međimurska	No. Farms	4.477	2.311	147	7	2	6.944
	ha	5.255	14.076	5.262	1.038	5.222	30.854
Osječko-baranjska	No. Farms	9.619	5.443	1.325	243	5	16.635
	ha	7.434	40.310	57.778	51.937	35.461	192.921
Požeško-slavonska	No. Farms	2.931	2.781	265	17	1	5.995
	ha	3.476	18.370	10.260	4.219	6.073	42.398
Primorsko-goranska	No. Farms	2.739	490	49	7	1	3.286
	ha	1.287	3.311	1.662	1.744	1.512	9.517
Sisačko-moslavačka	No. Farms	5.358	4.866	242	33	0	10.499
	ha	5.412	29.869	9.658	6.207	0	51.146
Splitsko-dalmatinska	No. Farms	13.743	674	20	5	0	14.442
	ha	6.773	3.638	760	985	0	12.156
Šibensko-kninska	No. Farms	6.440	172	8	0	0	6.620
	ha	2.923	852	295	0	0	4.070
Varaždinska	No. Farms	6.388	3.453	92	8	0	9.941
	ha	8.790	18.771	3.390	2.763	0	33.714
Virovitičko-podravska	No. Farms	5.771	2.472	644	63	3	8.953
	ha	3.834	18.857	25.909	15.481	12.545	76.625
Vukovarsko-srijemska	No. Farms	5.521	3.600	1.218	115	4	10.458
	ha	3.035	30.106	49.047	24.667	18.186	125.041

County		class (ha)					
		<3	>=3 i <20	>=20 i <100	>=100 i <1.500	>=1.500	sva PG
Zadarska	No. Farms	6.295	753	52	3	1	7.104
	ha	4.537	4.883	1.576	1.782	1.905	14.683
Zagrebačka	No. Farms	8.302	7.945	218	26	1	16.492
	ha	10.567	48.138	8.236	6.653	1.503	75.097
Ukupno RH	No. Farms	**120.230**	**63.707**	**6.060**	**653**	**22**	**190.672**
	ha	**103.680**	**424.719**	**238.654**	**149.047**	**91.860**	**1.007.959**

Source: Farm register, MAFRD, May 2009

2. Plant production, average of 2006-2008

	Surface (ha)	Production (t)	Yield t/ha
Cereals	558.763	3.098.132	5,541
Oil seeds*	94.502	250.154	2,629
Vegetables	17.537	297.167	16,989
Fruit	47.643	255.862	5,375
Grapes	32.320	187.554	5,808
Sugar beet	29.396	1.470.624	50,921
Potatoes	16.371	275.462	16,830
Tobacco	5.612	12.119	2,162

**soy, sunflower and oil rape*

3. Production of meat*, period 2006-2008

meat (net weight)	2006	2007	2008	Ø 2006-2008
Bovine	43.113	44.906	47.853	45.291
Pork	126.247	145.285	137.404	136.312
Sheap and goat meat	6.190	5.735	6.327	6.084
Poultry	88.098	93.405	93.031	91.511
Total	**263.648**	**289.331**	**284.615**	**279.198**

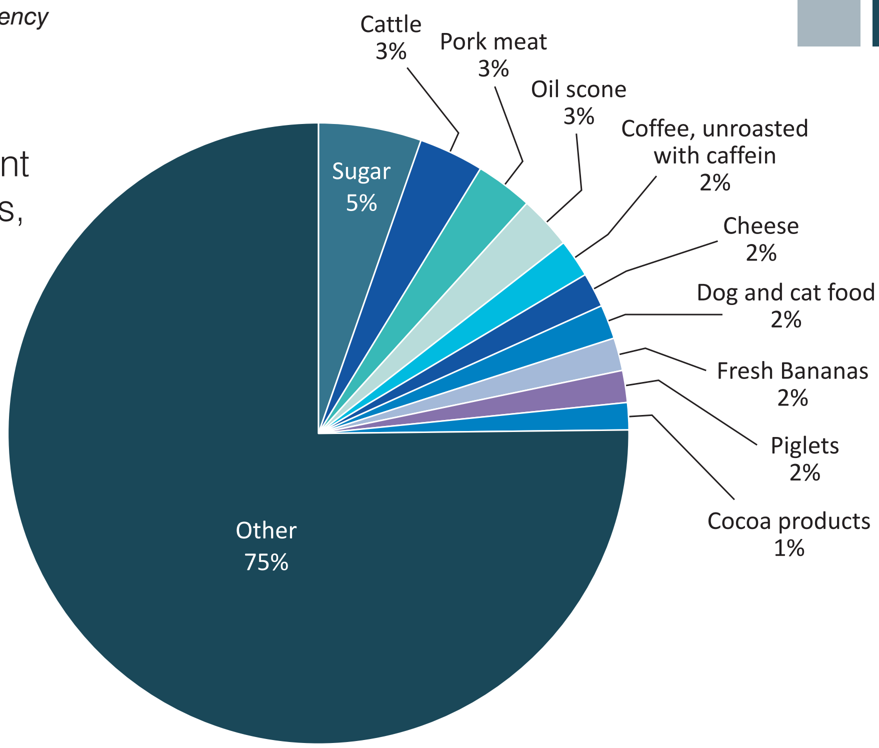
**GIP (gross indigenous production)*

4. Production of eggs and honey, period 2006-2008

	2006	2007	2008	Ø 2006-2008
Eggs	846	804	787	812
Hives*	255	314	310	293
Production of honey	2.529	2.638	2.714	2.627

**Data for 2006 from Croatian Agricultural Agency*

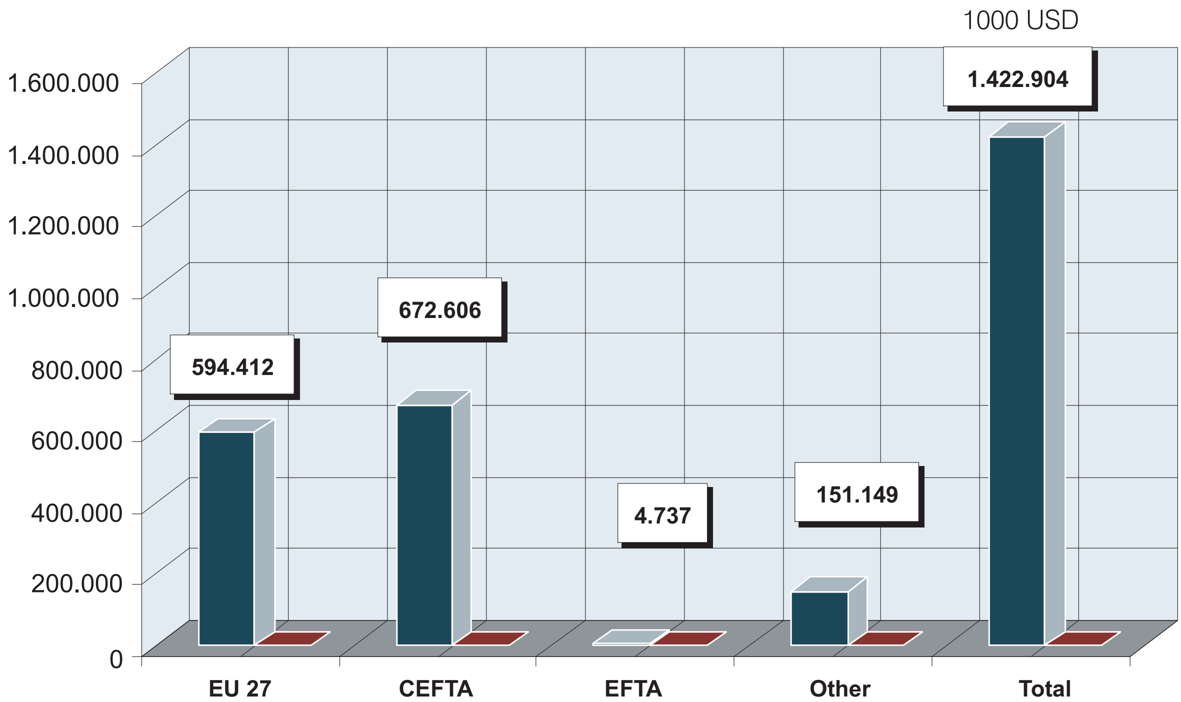
5. Values of the most important imported agricultural products, average for the period 2006-2008



6. Quantities and values of the most important exported agricultural products, average for the period 2006-2008

No.	Product	Quantities (t)	Value (USD)	Share (%)
1	Sugar	241.015	186.455.941	14,0
2	Cigarettes	7.223	103.035.346	7,8
3	Tuna	3.661	59.848.191	4,5
4	Wheat and meslin	246.394	57.633.248	4,3
5	Spices (Vegeta)	17.376	55.009.554	4,1
6	Other fresh fish	3.661	40.418.304	3,0
7	Beer	53.853	35.889.170	2,7
8	Corn	187.685	29.210.023	2,2
9	Cocoa products	5.908	28.004.136	2,1
10	Soups	5.180	21.580.300	1,6
11	Waffles,wafers and biscutes	7.816	20.351.575	1,5
12	Children food products	4.181	18.801.960	1,4
13	Feed	16.442	17.617.633	1,3
14	Tangerines	26.224	16.951.410	1,3
15	Cow hide	4.566	14.915.553	1,1
	Other	**-**	**621.879.784**	**46,8**
	Total	**-**	**1.327.602.128**	**100,0**

7. Croatian agricultural-food products export markets in the year 2008



** CEFTA (Bosnia and Herzegovina, Serbia, Montenegro, Macedonia, Albania, Moldova, Kosovo/UNMIK)*
** EFTA (Island, Leichtenstein, Norway, Switzerland)*

8. Information on Counties of the Republic of Croatia

I	ZAGREBAČKA	XII	BRODSKO-POSAVSKA
II	KRAPINSKO-ZAGORSKA	XIII	ZADARSKA
III	SISAČKO-MOSLAVAČKA	XIV	OSJEČKO-BARANJSKA
IV	KARLOVAČKA	XV	ŠIBENSKO-KNINSKA
V	VARAŽDINSKA	XVI	VUKOVARSKO-SRIJEMSKA
VI	KOPRIVNIČKO-KRIŽEVAČKA	XVII	SPLITSKO-DALMATINSKA
VII	BJELOVARSKO-BILOGORSKA	XVIII	ISTARSKA
VIII	PRIMORSKO-GORANSKA	XIX	DUBROVAČKO-NERETVANSKA
IX	LIČKO-SENJSKA	XX	MEĐIMURSKA
X	VIROVITIČKO-PODRAVSKA		GRAD ZAGREB
XI	POŽEŠKO-SLAVONSKA		

Source: www.dsz.hr

Contacts

MINISTRY OF AGRICULTURE, FISHERIES AND RURAL DEVELOPMENT
HR - 10 000 Zagreb, Ulica Grada Vukovara 78
Tel. + 385 1 6106 600
Fax. + 385 1 6109200
www.mps.hr

PAYING AGENCY
HR – 10000 Zagreb, Ulica grada Vukovara 269d
Tel: +385 1 6002736
Fax: +385 1 6002851

MISA - Market Information System in Agriculture
HR - 10 000, Ulica Grada Vukovara 78
Tel. + 385 1 6106 685
Fax. + 385 1 6106 635
www. tisup.mps.hr

CROATIAN AGRICULTURAL EXTENTION INSTITUTE
HR - 10002 Zagreb, Fra Andrije Kačića Miošića 9/III
Tel. + 385 1 4882 700
Fax: + 385 1 4882 701
email: hzpss@zg.hinet.hr

CROATIAN CENTER FOR AGRICULTURE, FOOD AND RURAL AFFAIRS
HR- 10 000 Zagreb, Hondlova 2/11
Tel. +385 1 4629 240
Fax: + 385 1 4629 241
www.hcphs.hr

CROATIAN AGRICULTURAL AGENCY
HR-10000 Zagreb, Kačićeva 9/3, p.p. 604
Tel. + 385 1 4846 655
Fax: + 385 1 4847 946
www.hssc.hr

CROATIAN FOOD AGENCY
HR - 31 000 Osijek, I.Gundulića 36 b
Tel. + 385 31 214 900
Fax. + 385 31 214 901
Besplatni telefon za potrošače: 0800 0025

CROATIAN CHAMBER OF ECONOMY
HR-10000 ZAGREB, Rooseveltov trg 2
Tel: + 385 1 4561 555
Fax: + 385 1 4828 380
www.hgk.hr

TRADE AND INVESTMENT PROMOTION AGENCY
HR- 10 000, Hebrangova 34
Tel: +385 1 4866 000
Fax: + 385 1 4866 008
www.apiu.hr

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For Publisher
Božidar Pankretić, M.Sc, Minister

Editor in Chief
Josip Kraljičković, M.Sc, State secretary

Editorial
Miroslav Božić, M.Sc, Director

Contributors
M. Begač, Z. Berak Fakin, D. Božičnik, M. Brodski, B. Bukvić,
I. Čorni, J. Đugum, I. Georgievski, Ž. Gudelj Velaga, Ž. Jurišić,
J. Mikulecky, G. Ramqaj, A. Sever Koren, N. Skakelja

Prepared by
Leticija Hrenković, M.Sc,

Translations
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