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Croatia

Oilseeds and Products

Soy Industry Update

2002

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Report Highlights: The Croatian soy industry has excess capacity and is geared toward processing imports. Brazil provides most of the imported soybeans and Brazilian traders regularly use 'GMO-free' certificates to gain a marketing advantage over U.S. origin beans. Domestic soybean area will grow by about 20 percent to 50,000 hectares (ha) in 2002.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Vienna [AU1], HR

Croatia's 2001 soybean area of 41,635 ha produced 91,841 MT. For 2001, government subsidies were 1,660 kn/ha (\$193/ha) and minimum prices (guaranteed by the government) were 1.53kn/kg (\$0.18/kg). Subsidies and minimum prices are expected to remain the same in 2002.

2002 soybean planting intentions are 50,000 ha and production should reach 120,000MT. Domestic soybeans tend to produce lower quality meal having a protein content between 34 to 38 percent.

Agrokor is the only soybean processor in Croatia and has a large (1,000 MT/day capacity) processing facility in Zadar. The Zadar facility has an elevator capacity of 35,000 cubic meters, can handle large vessels, and produces soybean meal and oil for Croatia, Bosnia Herzegovina, Slovenia and Hungary. Soybean production in Croatia occurs mostly in the Slavonija in the eastern part of the country whereas the Zadar is located in the western part of Croatia on the Adriatic coast. In 2001, the Zadar facility processed 200,000MT of soybean with only 38,000MT coming from domestic production. (Note: official import statistics appear to understate soybean imports by over 80,000MT).

Brazil provides most of the soybeans imported into Croatia and Brazilian traders regularly use 'GMO-free' certificates to gain a marketing advantage over U.S. origin beans. Little verification of these certificates is done by either importers or the government. (See [HR 1008](#) and [1009](#) for background on Croatian opposition to GM-crops.)

Imports of soybeans (HS 120100, HS 12010010 and HS 12010090) are duty free. Soybean meal (HS 230400) may be imported duty free from Bosnia-Herzegovina, the Czech Republic, Hungary and Bulgaria. The (MFN) duty rate for other countries is five percent.

Soybeans			
Value of Total Imports	\$11,745,918		
(1999 to 2001 average)			
Value of Imports from	\$3,438		
the US in 2001			
US Market Share in	0 percent		
import 1999			
US Market Share in	0 percent		
import 2000			
US Market Share in	0.017 percent		
import 2001			

Soybean meal

Value of Total Imports \$17,819,725

(1999 to 2001 average)

Value of Imports from \$8,838

the US in 2001

US Market Share in 2.3 percent
import 1999US Market Share in 0.75 percent
import 2000US Market Share in 0.05 percent
import 2001*Data source: Croatian Statistical Institute*

IMPORT TABLE		Year of import		
		1999.	2000.	2001.
Tariff number	Description COUNTRY	Quantity in kg	Quantity in kg	Quantity in kg
120100106	Soybean for sowing	<i>Total</i> 11,605	<i>Total</i> 0	<i>Total</i> 18,818
	Austria	5		0
	Canada	0		18
	Hungary	11,600		18,800
120100904	Soybean, the rest	<i>Total</i> 42,128,304	<i>Total</i> 31,035,774	<i>Total</i> 78,532,263
	Australia	500	1,650	800
	Austria	43,570	50,791	49,040
	Belgium	1,440	4,500	1,500
	Brazil	37,615,600	28,721,180	74,097,466
	Bosnia and Herzegovina	491,880	412,400	0
	Czech Republic	0	625	2,043
	Gana	250	0	0
	India	0	0	3,000
	Iran	0	0	503
	Italia	50,172	51,190	30,355
	Japan	0	0	30
	China	96	367	1,250
	Canada	0	0	700
	Hungary	3,900,610	1,791,710	44,660

	Netherlands	369	216	204
	Germany	23,355	455	480
	Romania	0	0	4,285,700
	USA	0	0	13,500
	Spain	462	690	1,032
23040000	Soybean meal	Total 68,985,513	Total 70,969,142	Total 98,641,841
	Argentina	584,867	4,713,516	7,046,941
	Bosnia and Herzegovina	44,000	0	0
	Austria	-	1,652,690	4,935,890
	Brazil	66,119,576	63,491,266	84,712,280
	France	0	73,020	0
	India	0	0	168,000
	Italy	67,000	218,000	683,000
	Hungary	-	151,000	200,000
	Netherlands	83,050	12,500	27,500
	Germany	493,210	100,620	120,230
	Panama	0	0	500,000
	US	1,593,810	531,530	49,000
	Slovenia	0	0	149,000
	Ukraine	0	0	50,000
	UK	0	25,000	0

EXPORT TABLE		Year of export		
		1999.	2000.	2001.
Tariff number	Description COUNTRY	Quantity in kg	Quantity in kg	Quantity in kg
120100106	Soybean for sowing	Total 50	Total 800	Total 0
	Bosnia and Herzegovina	50	0	0
	Turkey	0	800	0
120100904	Soybean, the rest	Total 76,110	Total 1,191,626	Total 2,470,136
	Bosnia and Herzegovina	70	230,886	2,582
	Czech Republic	54,480	0	0
	Slovakia	21,560	0	0

	Hungary	0	960,740	2,467,554
23040000	Soybean meal	Total 13,926,710	Total 7,695,280	Total 26,066,880
	Austria	494,890	0	127,930
	Bosnia and Herzegovina	1,229,190	167,710	1,382,300
	Italy	22,390	0	0
	Bulgaria	-	0	2,053,790
	Hungary	1,973,630	0	0
	Yugoslavia	0	0	995,070
	Slovakia	0	0	195,450
	Slovenia	10,206,610	7,527,570	21,312,340