



The situation of meat sector in Croatia

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Introduction

- Livestock production in the Republic of Croatia is a particularly important branch of agriculture contributing with 44% in the whole agricultural production value
- family farms - predominant part of the agricultural structure
- Small production units prevail, especially for cattle; swine production; sheep; goat and horse keeping
- Poultry production has large-scale production units for poultry meat and eggs.

Methods and Conditions

- In this paper are presented the situation and the current trends in livestock and meat production in Croatia
- The paper is based on the interpretation of result obtained in studie for project Agri-economic policy analysis in the new member states, the candidate countries and the countries of the Western Balkans.

Results and Discussion

Cattle and beef production

- production is organised in the family farms (83%)
- The number of cattle has been increasing in the last years
- The major increase was noticed in the production of calves bullocks and heifers under 1 year old (41%).
- There was a significant increase in the veal production (the production in 2004 increased by 27% compared to previous year, and even 157% compared to 2000).
- Self-sufficiency for beef decreased from 83% in 2001 to around 75% in last year

Pork production

- This production amounts to 14.5% in total agricultural production and 33% in livestock production
- small production units - over 85% farms are production units with up to 10 sows
- self-sufficiency for swine meat in Croatia is around 80%

Poultry production

- Poultry production amounts to approx. 7% of total agricultural production, i.e. 18% of livestock production, and **is self-sufficient**
- The production is organised in big production units
- Chicken production represents the main production section (93%),goose account to only 3% , each duck and turkey productions represent 2% of the total poultry production

Sheep/Goats production

- Sheep production amounts to some 4.5% of total agricultural production
- More than 95% of the sheep and goat production is organised on family farms
- According to the data of Central Bureau of Statistics, Croatia had 768,000 sheep and 126,000 goats in 2006
- The self-sufficiency level for sheep meat is rather low, but it is increasing and in 2004 it amounted to 79%.

Horse production

- worst downward trend
- from 190,000 (in 1970) their number fell to as low as 9,000 (in 2003) when this falling trend was stopped
- These animals are used mostly for meat production in the low-input system (indigenous breeds)

Meat processing sector

- The majority of the slaughterhouses in Croatia operate with outdated technologies and at a low capacity-level
- In June 2005, 196 slaughterhouses for hard and soft-hoofed animals, of which 12 are accredited for export, and 74 slaughterhouses for poultry, of which 13 are accredited for export, were registered with the Ministry of Agriculture, forestry and Water management.
- In the last few years started the consolidation of the meat producers and processors

State policy regarding livestock and meat sector

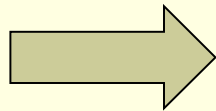
- Croatia has specific schemes for cattle fattening, cattle rearing and dairy cows
- Production subsidies above a minimum threshold are also granted to raise sheep and goats
- The pig production development Programme improved production conditions to increase the number of fatteners per sow.
- Concerning *poultry*, Croatia grants production subsidies above a minimum threshold, besides applying customs duties and preferential quotas.

Meat consumption

- Croatian consumers mostly eat pork and poultry meat.
- consumption of pork per capita is 18.1 kg.
- In 2006 – 19.6 kg of poultry meat was consumed per household member.
- In 2006 consumption of veal, a family member consumed 9.4 kg of beef and only 2.2 kg of veal
- consumption of dried, smoked and salted meat is much higher and amounted to 15.3 kg a year
- Mutton, goat and lamb meat account to only 1.6% of total meat consumption.

Conclusion I

- production does not satisfy domestic needs and Croatia is net importer of meat and meat products. Only poultry production is self-sufficient
- The main problem we face are small production units that often do not fulfil environmental and animal welfare requirements
- the Government approved development programmes for cattle and pig production in order to increase the production, to change the production systems by establishing new and modern farms.



➤ livestock and meat in last years shows increasing trend.

Conclusion II

- The new technologies have been introduced respecting all EU hygiene and quality standards.
- Meat and meat products producers started to apply a marketing approach in their businesses
- The development of producers' brands already showed the positive impact on the business results
- Such situation helps to increase the competitiveness of domestic processing industry and to ensure its place in the international market.

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