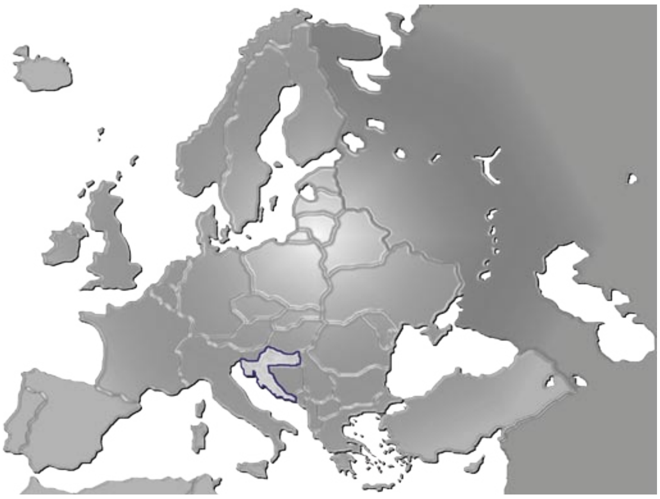


DISTRIBUTIVNA TRGOVINA

DISTRIBUTIVE TRADE

UVOD

Distributivna trgovina je važna gospodarska djelatnost koju možemo definirati kao ukupnost svih oblika trgovačkih aktivnosti, od nabave robe kod proizvođača do isporuke te robe krajnjem potrošaču.

Distributivna trgovina ima značajno mjesto u ukupnom gospodarstvu Republike Hrvatske, jer u toj djelatnosti posluje oko 37,3% gospodarskih subjekata, zapošljava oko 15,2% ukupnog broja zaposlenih te je udio distributivne trgovine u BDP-u u 2006. godini iznosio 10,7% (prema podacima Državnog zavoda za statistiku).

Djelatnost trgovine suočava se s velikim izazovima, kao što su povećana konkurencija na domaćem tržištu, koncentracije i preuzimanja, uvođenje novih tehnologija, novi maloprodajni formati, elektronička trgovinate te globalizacija.

Razvoj informatičkog društva i tehnologije mijenja način poslovanja, prilagođavajući ga novim potrebama potrošača. Pojavljuju se novi oblici prodaje - izravna prodaja potrošaču, prodaja na daljinu, elektronička trgovina, te nove komercijalne usluge u prezentaciji proizvoda, savjetima, plaćanju i isporuci.

Budući razvoj distributivne trgovine ovisit će o njezinoj sposobnosti prilagodbe zahtjevima tržišta, ali i o zakonodavstvu koje bi trebalo osigurati razvoj učinkovitog sustava za zaštitu tržišnog natjecanja.

INTRODUCTION

Distributive trade is an important economic activity that can be defined as the totality of all forms of trade, from the procurement of goods form the manufacturer to delivering them to the final consumer.

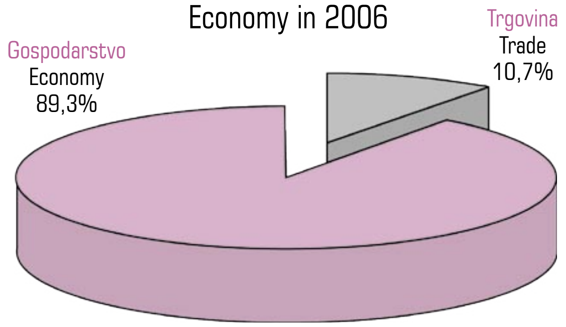
Distributive trade holds the significant place in Croatian economy because in 2006 , according to figures from the Central Bureau of Statistics, its share of GDP was 10.7%. Further, it accounted for 37.3 % of registered companies and for 15.2% of workforce.

Trade is facing major challenges, such as stronger competition in the domestic market, concentration and takeovers, introduction of new technologies, new forms of retail trade, e-commerce and globalisation

The development of the information society and technology is changing the way of conducting business, adjusting it to consumers' new needs. There are new types of commerce – direct selling to the consumer, distance sale, e-commerce and new commercial services in presenting a product, advising, payments and delivery.

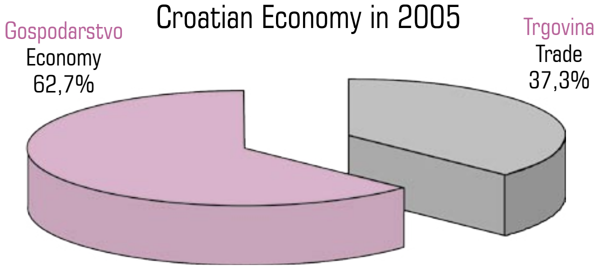
The future development of distributive trade will depend on its ability to adapt to market demands and to the legislation formulated to ensure the creation of an efficient system for the protection of market competition.

BDP - udio trgovine u gospodarstvu RH 2006.
GDP - Trade Share of Croatian Economy in 2006



Izvor: DZS; Obrada: HGK — Source CBS; Compiled by: CCE

POSLOVNI SUBJEKTI - udio trgovine u gospodarstvu RH 2005.
BUSINESS ENTITIES - Trade Share of Croatian Economy in 2005

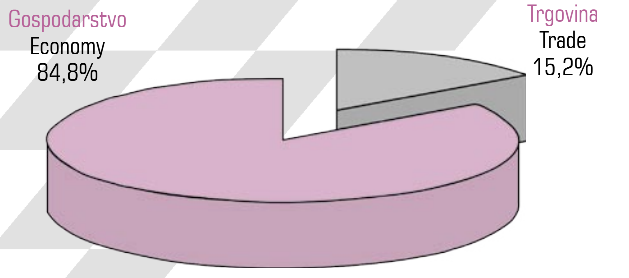


Izvor: DZS; Obrada: HGK — Source CBS; Compiled by: CCE

POSLOVNI SUBJEKTI, PRODAVAONICE I ZAPOSLENI

U distributivnoj trgovini u Hrvatskoj 2006. bilo je aktivno 33.214 poslovnih subjekata pri čemu trgovačka društva čine 42,5%, a obrtnici 57,5% ukupnog broja poslovnih subjekata.
U strukturi broja prodavaonica 51,8% čine prodavaonice trgovačkih društava, a 48,2% prodavaonice obrtnika.
Struktura broja zaposlenih pokazuje veća odstupanja: trgovačka društva zapošljavaju skoro 4/5, odnosno 79,1% ukupnog broja zaposlenih u trgovini u 2006., a obrtnici nešto iznad 1/5, odnosno 20,9%.
Distributivna trgovina je drugi po veličini poslodavac u Hrvatskoj, odmah iza prerađivačke djelatnosti. Krajem prosinca 2006. distributivna trgovina je zapošljavala 216.682 osobe, pri čemu je 171.333 bilo zaposleno u trgovačkim društvima, a 45.349 kod obrtnika. U okviru djelatnosti najveći je broj zaposlenih u trgovini na malo (G 52) koja je krajem 2006. zapošljavala 49,2% zaposlenih, slijedi trgovina na veliko (G 51) s 36,1%, trgovina motornim vozilima i motociklima (G 50) s 8,4% te netrgovinske djelatnosti 6,4%.

ZAPOSLENI - udio trgovine u gospodarstvu RH 2006.
PERSONS IN EMPLOYMENT - Trade Share of Croatian Economy in 2006



Izvor: DZS; Obrada: HGK   Source CBS; Compiled by: CCE

BUSINESS ENTITIES, SHOPS AND EMPLOYMENT

A total of 33.214 Croatian business entities were active in distributive trade in 2006, out of which companies make 42.5% and craft businesses 57.5% (a special small business category).
The composition of outlets shows that 51.8% were owned by companies and 48.2% by craftspeople.
However, looking at the breakdown for employment, there is a diverging picture in terms of employment: companies employ almost 4/5 of workforce, i.e. 79.1% of the total number of persons employed in trade in 2006, and craft businesses account for a share just slightly over 1/5, or 20.9%.
Distributive trade is the second largest employer in Croatia right next to processing industry. By the end of December 2006, 216,682 persons were employed in it, of whom 171,333 in companies and 45,349 in craft businesses. Another breakdown for 2006 shows that retail trade (activity G 52) employed 48.6% of those working in trade, wholesale trade (G 51) 37.2%, and motor vehicles and motorcycles (G 50) 8.6% and the non-commercial activities 6.7%.

BROJ POSLOVNIH SUBJEKATA, PRODAVAONICA I ZAPOSLENIH OD 2001. DO 2006.
NUMBER OF BUSINESS ENTITIES, OUTLETS AND PERSONS IN EMPLOYMENT FROM 2001 TO 2006

	2001	2002	2003	2004	2005	2006
Broj poslovnih subjekata / No. of business entities	**34402**	**40896**	**39505**	**36531**	**34682**	**33214**
Pravne osobe / Legal entities	19061	20367	19530	16507	15173	14123
Obrtnici / Tradesmen	15341	20529	19975	20024	19509	19091
Broj prodavaonica / Number of outlets	**40498**	**46429**	**46557**	**44835**	**44038**	**43011**
Pravne osobe / Legal entities	23714	24406	24389	22290	22278	22284
Obrtnici / Tradesmen	16784	22023	22168	21915	21760	20727
Broj zaposlenih / No. of employees	**178587**	**207371**	**215147**	**208533**	**211594**	**216682**
Pravne osobe / Legal entities	145988	163879	170076	164515	166407	171333
Obrtnici / Tradesmen	32599	43492	45071	44018	45187	45349

Izvor: Priopćenja Državnpg zavoda za statistiku   Source: CBS – First Release

PROMET

U distributivnoj trgovini ostvaren je u 2006. promet od 244,9 milijardi kuna, pri čemu su trgovačka društva realizirala 94,2% prometa, a obrtnici 5,8% prometa. U razdoblju od 2001. do 2006. ostvareni promet trgovačkih društava značajno je porastao, a najveća trgovačka društva povećala su svoj tržišni udio.

KARAKTERISTIKE MALOPRODAJNE MREŽE I MALOPRODAJNOG TRŽIŠTA

Hrvatsku maloprodajnu mrežu još uvijek obilježava usitnjenost, što se odražava u dominaciji malih prodavaonica /manjih od 100 m^2/. Međutim, u strukturi prodavaonica sve značajnije mjesto dobivaju maloprodajni objekti velikih površina. Prema procjeni Sektora za trgovinu u zadnjih desetak godina u Hrvatskoj je izgrađeno više od 1.000.000 m^2 maloprodajnog prostora velikih prodajnih površina. Prodavaonice velikih formata razvijaju se i u našoj zemlji ubrzanim tempom, jer su primjerene promjenama u na-

TURNOVER IN DISTRIBUTIVE TRADE

Distributive trade achieved a turnover of HRK 244,9 billion in 2006, with companies accounting for 94.2% and craft businesses for only 5.8%. From 2001 to 2006, the turnover generated by companies grew significantly, with large companies increasing their market shares.

RETAIL NETWORK AND RETAIL MARKET CHARACTERISTICS

The retail network in Croatia is still atomised, i.e. dominated by small shops (smaller than 100 sq m). However, large retail establishments figure more and more prominently. According to the CCE Trade Department data some 1,000,000 sq m of large retail facilities were built in the past ten years.
The construction of malls in Croatia has been notably haphazard in the last several years. Thus, large mercantile establishments are territorially concentrated in county centres – most of them in Zagreb, Rijeka, Split and Osijek.

činu življenja i novim potrebama kupaca. U brojnim anketama uočeno je da kupci nastoje reducirati učestalost odlazaka u kupovinu, koncentrirati nabavu te povećati zalihe robe u kući. Najnoviji razvojni trend ide u smjeru izgradnje modernih trgovačkih centara koji pružaju različite pogodnosti kupovine i zabave pod jednim krovom te postaju mjesta društvenih okupljanja. Zbog nepostojanja politike urbanističkog planiranja izgradnje trgovačkih kapaciteta, u Hrvatskoj je taj proces obilježen teritorijalnom koncentracijom prodavaonica velikih formata u većim županijskim središtima – Zagrebu, Splitu, Rijeci i Osijeku. Po broju novoizgrađenog maloprodajnog prostora u 2006. godini dominira grad Zagreb, međutim trgovački centri šire svoje poslovanje i u druga županijska središta poput Bjelovara, Koprivnice, Siska ili Čakovca. No, Uredbom o posebnim uvjetima za obavljanje trgovine na malo u određenim vrstama prodavaonica (NN br. 105/01) Hrvatska je uspostavila kontrolu nad razvojem prodavaonica čija je korisna (neto) površina veća od 3000 m^2, odnosno veća od 1500 m^2, ako se prodavaonice nalaze na prostorima koji čine trgovačku cjelinu u okviru trgovačkih parkova, trgovačkih središta ili trgovačkih centara.

Large sales establishments are developing at an accelerated pace also in Croatia, because there is a need to adjust to changing ways of living and customers' new needs. The many surveys conducted so far indicate that customers are trying to reduce the frequency of shopping errands, to concentrate their purchases and increase their supply of goods at home. Besides this, the latest trends are towards building modern shopping centres that provide various shopping amenities and entertainment under a single roof. They are also becoming places where young people gather and socialise. Due to non-existent policy of town planning regarding the construction of trade facilities in Croatia, this process is characterised by territorial concentration of large sales establishments in larger county hubs such as Zagreb, Split, Rijeka and Osijek. In 2006 the majority of the newly established retail facilities were built in the city of Zagreb, but trade centers also expand their business activities to other county hubs such as Bjelovar, Koprivnica, Sisak or Čakovec. It is only with the Regulation Concerning the Special Requirements for Retail Trade in Specific Types of Shops (NN [Official Gazette] 105/01) that Croatia established control over the development of outlets with usable (net) areas of 3,000 sq m or more, and of areas exceeding

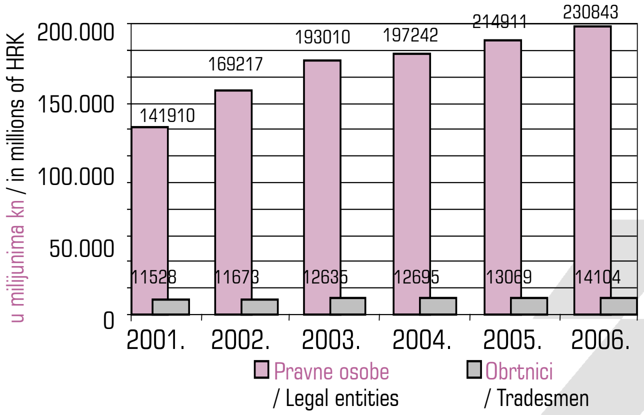
BROJ POSLOVNIH SUBJEKATA, PRODAVAONICA, ZAPOSLENIH I PROMET PREMA PRETEŽNOJ DJELATNOSTI POSLOVNOG SUBJEKTA U 2006.

NUMBER OF BUSINESS ENTITIES, OUTLETS, PERSONS IN EMPLOYMENT AND TURNOVER BY DOMINANT ACTIVITY OF BUSINESS ENTITY - 2006

	Broj poslovnih subjekata / No. of business entities	Broj prodavaonica / servisa / No of outlets / service points	Zaposleni / Persons in employment	Ostvareni promet u milijunima kuna s PDV-om / Achieved turnover in millions of HRK, incl. VAT
Ukupno / Total	**33214**	**43011**	**216682**	**244948**
Pravne osobe / Legal entities	14123	22284	171333	230843
Obrtnici / Tradesmen	19091	20727	45349	14105
G 50 – ukupno / Total	**4157**	**4568**	**18099**	**33485**
Pravne osobe / Legal entities	1320	1659	11695	32111
Obrtnici / Tradesmen	2837	2909	6404	1374
G 51 – ukupno / Total	**9283**	**8251**	**78238**	**111347**
Pravne osobe / Legal entities	8389	7294	75902	110419
Obrtnici / Tradesmen	894	957	2336	928
G 52 – ukupno / Total	**19451**	**27967**	**106510**	**72233**
Pravne osobe / Legal entities	4091	11106	69901	60430
Obrtnici / Tradesmen	15360	16861	36609	11803
Netrgovinske djelatnosti / Non-trading activities	**323**	**2225**	**13835**	**27883**
Pravne osobe / Legal entities	323	2225	13836	27883
Obrtnici / Tradesmen	-	-	-	-

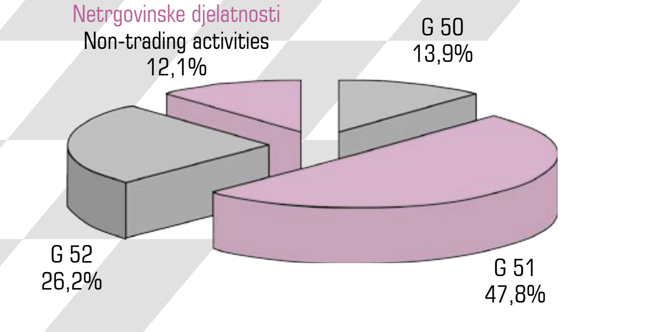
Izvor: Priopćenja Državnpg zavoda za statistiku — Source: CBS – First Release

OSTVARENI PROMET DISTRIBUTIVNE TRGOVINE
TURNOVER ACHIEVED IN DISTRIBUTIVE TRADE



Izvor: DZS; Obrada: HGK — Source CBS; Compiled by: CCE

STRUKTURA PROMETA DISTRIBUTIVNE TRGOVINE PREMA NKD-u 2006. - PRAVNE OSOBE
TURNOVER STRUCTURE IN DISTRIBUTIVE TRADE ACCORDING TO NCEA IN 2006 - LEGAL ENTITY



Izvor: DZS; Obrada: HGK — Source CBS; Compiled by: CCE

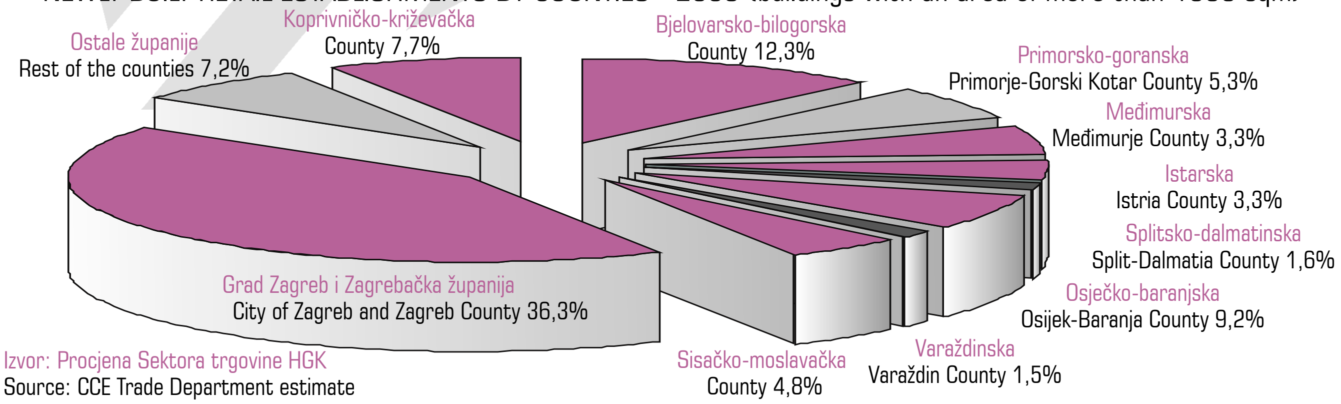
TOP 10 TRGOVAČKIH DRUŠTAVA – VRIJEDNOSNI UDJELI NA TRŽIŠTU RH
TOP 10 COMPANIES - SHARE OF CROATIAN MARKET

2000	%	2001	%	2002	%	2003	%	2004	%	2005	%	2006	%
Konzum*	6,6	Konzum*	8,0	Konzum*	9,4	Konzum*	15,1	Konzum*	19,5	Konzum*	21,2	Konzum	21,5
Getro*	4,5	Getro*	5,2	Getro*	7,6	Getro*	8,0	Getro*	7,6	Getro*	7,2	Billa	7,7
KTC*	3,1	KTC*	4,6	KTC*	5,4	KTC*	6,0	KTC*	5,0	Billa	6,7	Getro	6,3
Kerum*	1,7	Billa	2,8	Billa	4,4	Billa	7,0	Billa	4,8	Kaufland	5,4	Kaufland	6
Billa	0,7	Presoflex*	2,1	Mercator	3,1	Kaufland	3,0	Kaufland	4,8	KTC*	4,5	KTC	4,5
Presoflex*	-	Kerum*	2,0	Presoflex*	2,3	Presoflex*	2,3	Mercator	2,1	Kerum*	2,5	Mercator	4,1
Mercator	-	Mercator	1,1	Kaufland	1,8	Mercator	2,1	Presoflex*	2,0	Mercator	2,4	Plodine	3,9
Kaufland	-	Kaufland	-	Kerum*	1,5	Metro	1,4	Kerum*	1,9	Presoflex*	1,8	Presoflex	2,6
Metro	-	Metro	-	IperCoop	0,9	Kerum*	1,2	Metro	1,7	Metro	1,8	Kerum	2,4
IperCoop	-	IperCoop	-	Metro	0,7	IperCoop	0,5	IperCoop	1,6	IperCoop	1,4	Tommy	2,4
Top 10	16,6		25,8		37,1		46,6		51,0		54,9		61,4

*domicilni trgovci / Izvor: GFK Consumer Scan / Household Panel

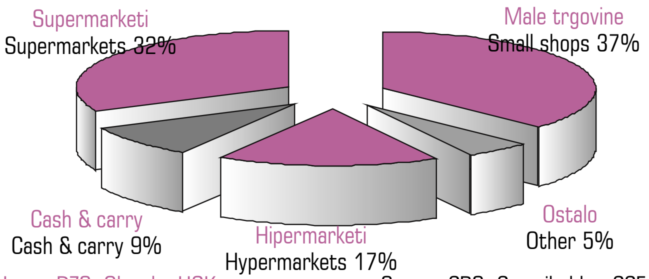
* local companies / Source: GFK Consumer Scan / Household Panel

STRUKTURA NOVOIZGRAĐENOG MALOPRODAJNOG PROSTORA PO ŽUPANIJAMA 2006. (objekti iznad 1000 m²)
NEWLY BUILT RETAIL ESTABLISHMENTS BY COUNTIES - 2006 (buildings with an area of more than 1000 sqm)



Izvor: Procjena Sektora trgovine HGK
Source: CCE Trade Department estimate

VRIJEDNOSNI UDIO TIPOVA PRODAVAONICA 2006.
TRADE SHARE OF OUTLET TYPES 2006



Izvor: DZS; Obrada: HGK
Source CBS; Compiled by: CCE

Hrvatsko maloprodajno tržište danas karakterizira visoki stupanj koncentracije koji iznosi 61,4% (prema podacima Gfk o vrijednosnom udjelu vodećih maloprodajnih tvrtki na hrvatskom tržištu). Udio deset vodećih trgovaca prije šest godina bio je tek oko 16,6 %. No valja naglasiti kako koncentracija nije nikakva hrvatska specifičnost. Naime, u većini europskih država prva tri trgovca drže od 60 do 80 posto tržišta. Stoga se može očekivati da će i u Hrvatskoj doći do daljnjih preuzimanja i povezivanja odnosno konsolidacije. Glede strukture tržišta po tipovima formata, u Hrvatskoj je struktura tržišta već nekoliko godina stabilna, odnosno najveći tržišni udio imaju supermarketi i male prodavaonice. Godinu 2006. na hrvatskom maloprodajnom tržištu obilježio je ulazak prvog diskontera.

Iz priloženih grafikona dobro se vide promjene koje se događaju na maloprodajnom tržištu. Najveći vrijednosni udio na maloprodajnom tržištu RH zauzimaju i dalje male trgovine s udjelom od 37%, no s tendicijom nastavka smanjivanja tržišnog udjela, što uostalom nije nikakva hrvatska specifičnost. S druge strane, nastavlja se trend povećava-

1,500 sq m in cases when an outlet is a part of a larger complex, such as shopping parks, centres and malls.
According to GfK data on the share top 10 companies have in Croatian market, the Croatian retail network is today characterised by a large degree of concentration (61.4%). Six years ago their share was only 16.6 %. It must be pointed out, though, that such concentration is not present only in Croatia. In the majority of European countries the first three retailers hold 60 to 80 percent of the market.
It is, thus, expected that further take-overs and mergers i.e., consolidations will eventually occur in Croatia in the future.
Regarding the market structure by size types the situation in Croatia has been stable for several years i.e., the largest shares still hold the supermarkets and small shops. In 2006 the first discount store has been opened in Croatia.
From the above charts the changes in retail market are clearly visible. Small shops (37%) still take the larger market share but with continuous decline tren in all developed countries. On the other hand hypermarkets (17%) and supermarkets (32%) steadily increase their market share in retail market. The changes in retail trade have been influenced by numerous factors - competition, viewpoints and habits of the consumers, legal environment and a number of other factors.

Typical characteristics of the Croatian customer

- citizens make 60% of their major purchases in supermarkets
- 40% of households make their major purchases once a month
- 70% of daily shopping is carried out in shops smaller than 100 sq m
- 64% of customers choose a specific shop for their major purchases because of wide range of goods and favourable prices
- 74% choose a shop close to their home for their daily purchases

nja udjela supermarketa i hipermarketa na maloprodajnom tržištu pa je tako udio supermarketa 32% dok je udio hipermarketa 17%. Na nastale promjene u maloprodaji djeluje niz faktora u okruženju – konkurencija, stavovi i navike potrošača, pravno okruženje i niz drugih čimbenika.

Neke osobitosti profila hrvatskih kupaca

- 60% velikih kupovina građani obavljaju u supermarketima
- 40% kućanstava obavlja velike kupovine jednom mjesečno
- 70% svakodnevnih kupovina obavlja se u prodavaonicama do 100 m²
- 64% kupaca odabire neku prodavaonicu za velike kupovine zbog široke ponude roba i dobrih cijena
- 74% kupaca za svakodnevne kupovine izabire prodavaonicu u blizini mjesta stanovanja
- 97% velikih kupovina obavlja se u Hrvatskoj
- oko 70% građana plaća gotovinom, oko 25% kreditnom karticom, a sve manje građana plaća čekom
- osnovni razlozi odabira prodavaonice za veliku kupovinu: povoljna cijena, širina ponuđenog asortimana, mogućnost plaćanja na više načina

Izvor podataka: Istraživanje GFK, Zagreb

TRENDOVI U HRVATSKOJ TRGOVINI

Glede najnovijih trendova u hrvatskoj trgovini, predviđa se da će se nastaviti koncentracija i konsolidacija trgovine kako vlastitim rastom pojedinih trgovaca, tako i kroz akvizicije, strateško povezivanje pa i kapitalno povezivanje, nastavit će se povećavati kvadratura prodajne površine, rast ukupnog prometa, intenzivirat će se konkurencija te će doći do snažnijeg povezivanja proizvodnje i trgovine posebno putem privatnih marki. Sukladno europskoj i svjetskoj praksi u distributivnoj trgovini koja nastoji što učinkovitije i uspješnije odgovoriti na potrebe kupaca i Hrvatska distributivna trgovina prati svjetske i europske maloprodajne trendove o čemu svjedoče izgradnja suvremene trgovačke mreže koja asortimanom, kvalitetom ponude i usluga, cijenama može ravnopravno sudjelovati u tržišnoj utakmici u kojoj je izložena brojnoj konkurenciji.
U cilju konkurentne distributivne trgovine dograđuje se i zakonodavstvo koje stvara pravni okvir za razvoj trgovine.

Prema procjeni ugledne konzultantske kuće Price Waterhouse europsku će maloprodaju do 2010.g. obilježavati sljedeće tendencije:

- konsolidacije /na temelju spajanja i preuzimanja trgovačkih društava/
- jačanje značenja velikih maloprodajnih kapaciteta
- razvoj vlastite trgovačke marke
- diversifikacija usluga trgovine
- razvoj elektroničke trgovine.

STRATEŠKI CILJEVI U RAZVOJU HRVATSKE TRGOVINE

- Restrukturiranje u smjeru okrupnjavanja i podizanja kvalitete usluga primjerenih sve većoj konkurenciji i izazovima koje nameću procesi globalizacije, liberalizacije i standardizacije.
- Izgradnja aktivnog partnerstva na ulaznoj i izlaznoj strani gospodarstvenog lanca s proizvođačima, maksimalno udovoljavanje zahtjevima kupaca i dobavljača te poticanje učinkovite tržišne prilagodbe.
- Jačanje konkurentnosti racionalizacijom troškova poslovanja, povećavanjem kvalitete i snižavanjem cijena usluga.

- 97% of major purchases are made in Croatia
- approx. 70% of citizens pay in cash, 25% with credit cards, and an ever decreasing number with cheques
- the main reasons for choosing a shop for major purchases include favourable prices, wide range of products, diversity of payment modes

Source:GfK Centre for Market Research

TRADE TRENDS IN CROATIA

With regard to the new trends in Croatian retail network it is anticipated that trade concentration and consolidation will inevitably continue either through growth of individual traders as well as through acquisitions, strategic and capital alliances; the growth of the usable net area of outlets and the total turnover is also anticipated: the competition will intensify and stronger connection of production and trade will occur especially through private brands. Pursuant to European and international practice in distributive trade which tries to meet the needs of the customers, Croatian distributive trade also follows both international and European retail trends. In the past few years modern trade network is being established that can equally participate on the market among numerous competitors with its production range, the quality of offer and services as well as its prices.
In order to establish the competitive distributive trade the legislature which creates the legal framework for development of trade must be amended.
The Croatian trade sector started competing with international trading companies and multinationals in 1998. Croatian entrepreneurs had a range of head-start advantages in comparison to their foreign competition, such as familiarity with legislation, market, suppliers, language, customers' habits, and favourable outlet locations, possibilities for local lobbying etc. However, domestic trade was not ready to adjust its development concepts to international trends. It was only when international chains brought the knowledge of patterns governing trade in developed countries that a part of Croatian entrepreneurs started seeking new models for business association in order to secure greater market shares. Owing to increasing competition, traders are currently establishing horizontal and vertical ties and co-operation. In the market, modernised sale systems are taking the place of business entities that are not up to requirements with respect to staff, technology and their organisation.
Forecasts are that foreign trading companies will continue to invest in Croatia, especially on the outskirts of cities (Zagreb, Split, Rijeka, Osijek, Pula), while the pressure on small, poorly organised small business entities will further increase owing to closer ties with the EU. Business entities that are not able to adjust to new developments will become a prey in mergers and take-overs, or they will simply dwindle away.
Price Waterhouse, a reputed consultancy company, forecasts the following trends for European retail trade till 2010:

- consolidation (based on mergers and take-overs of trading companies);
- increasing importance of large retail capacities;
- development of house brands;
- diversification of services in trade;
- development of e-commerce.

STRATEGIC OBJECTIVES FOR THE DEVELOPMENT OF TRADE IN CROATIA

- Restructuring towards concentration and higher quality of services in order to face growing competition and challenges associated with globalisation, liberalisation and standardisation;

- Povećanje udjela trgovine u BDP-u na 16%.
- Poboljšanje kvalifikacijske strukture trgovačkih kadrova.
- Izgradnja informacijskog sustava kompatibilnog suvremenim potrebama trgovine.
- Svođenje neslužbenog gospodarstva u trgovini / sivog i crnog tržišta te raznih protuzakonitih aktivnosti / na najmanju moguću mjeru.
- Razvoj tržišne infrastrukture.
- Izgradnja trgovačke mreže i infrastrukture na otocima, u manjim naseljima i u ruralnim područjima.
- Zaštita tržišnog natjecanja i zaštita potrošača.

Izvor: Ured za strategiju razvitka RH - Hrvatska u 21. stoljeću /gospodarstvo – strategija u izradi/ - http://www.hrvatska21.hr/gospodarstvo.htm

- Creation of active partnerships with manufacturers on both the incoming and outgoing sides of economic flows, maximised meeting of customers' and suppliers' demands, and encouragement of effective adjustments to market requirements;
- Strengthening competitiveness through increased operational cost efficiency, higher quality and lower prices for services;
- Raising the trade share of GDP to 16%;
- Improving workforce skills in trade;
- Building an information system to serve the needs of modern trade;
- Minimising unofficial economy in trade (grey and black markets, and various illegal activities);
- Development of market infrastructure;

DESET NAJVEĆIH TRGOVAČKIH DRUŠTAVA PREMA OSTVARENOM PRIHODU U 2006.

TOP 10 TRADE COMPANIES ACC. TO TURNOVER IN 2006

R.br./No.	G 50	G 51	G 52
1.	OMV HRVATSKA d.o.o., Zagreb	GETRO d.d., Sesvete	KONZUM d.d., Zagreb
2.		MEDIKA d.d., Zagreb	TISAK d.d., Zagreb
3.	INA OSIJEK PETROL d.d., Zagreb	PHOENIX FARMACIJA d.d., Zagreb	BILLA d.o.o, Zagreb
4.	CITROEN HRVATSKA d.o.o., Zagreb	KAUFLAND HRVATSKA d.o.o., Zagreb	MERCATOR-H d.o.o., Velika Gorica
5.	AUTO ZUBAK d.o.o.,Velika Gorica	BRODOMERKUR d.d., Split	KTC d.o.o, Krizevci
6.	PEUGEOT HRVATSKA d.o.o., Zagreb	EURO-PETROL d.o.o., Rijeka	KERUM d.o.o, Split
7.	P.Z. AUTO d.o.o., V. Gorica	PEVEC d.o.o, Bjelovar	PLODINE d.o.o., Rijeka
8.	TOYOTA CROATIA d.o.o., Zagreb	AGROKOR TRGOVINA d.d., Zagreb	DM-DROGERIE MARKT d.o.o., Zagreb
9.	AUTOCOMMERCE d.o.o, Zagreb	MEDICAL INTERTRADE d.o.o., Sveta Nedjelja	STUDENAC d.o.o., Omis
10.	TOMIĆ&CO d.o.o., Zagreb	OCTAL PHARMA d.o.o., Zagreb	TOMMY d.o.o., Split

Izvor: Sektor za statistiku i informatiku HGK — Source: CEE Sector for statistic and computerization

TEMELJNI ZAKONODAVNI OKVIR DISTRIBUTIVNE TRGOVINE

Zakoni

- Zakon o trgovini / pročišćeni tekst/ - NN br. 49/03, 103/03, 170/03
- Zakon o elektroničkoj trgovini - NN br. 173/03
- Zakon o elektroničkoj ispravi (NN 150/05)
- Zakon o elektroničkom potpisu (NN 10/02)
- Zakon o zaštiti potrošača - NN br. 96/03
- Zakon o zaštiti tržišnog natjecanja - NN br. 122/03
- Zakon o hrani – NN br. 117/03, 130/03, 48/04, 85/06

Pravilnici

- Pravilnik o obliku i načinu vođenja popisa robe u trgovini na malo - NN br. 73/02, 79/02
- Pravilnik o minimalnim tehničkim uvjetima za poslovne prostorije u kojima se obavlja trgovina i posredovanje u trgovini i uvjetima za prodaju robe izvan prostorija - NN br. 37/98, 73/02, 153/02
- Pravilnik o dopuštenom manjku s naslova kala, rasipa, kvara i loma na proizvodima u trgovini (za pravne osobe) - NN br. 57/98, 81/02, 203/03
- Pravilnik o općem deklariranju ili označavanju hrane – NN br. 114/04, 128/04, 34/05
- Pravilnik o načinu i postupku obavljanja kakvoće proizvoda za koje je potrebno uvjerenje – NN br. 9/00
- Pravilnik o ambalaži i ambalažnom otpadu NN br. 97/05, 115/05

Uredbe

- Uredba o mjerama sprečavanja nedopuštene prodaje roba na tržnicama i drugim otvorenim prostorima - NN br. 69/01
- Uredba o posebnim uvjetima za obavljanje trgovine na malo u određenim vrstama prodavaonica - NN br. 105/01

- Development of a trade network and infrastructures on islands, in small places and rural areas;
- Protection of competition and of consumers.

Source: Development Strategy Office of the Republic of Croatia – Croatia in 21st Century (economy – strategy is in the formulation stage) www.hrvatska21.hr/gospodarstvo.htm

BASIC REGULATORY FRAMEWORK FOR DISTRIBUTIVE TRADE:

Laws

- Trade Act (rev. text, NN [Official Gazette] 49/03, 103/03, 170/03, 55/04
- E-commerce Act - NN 173/03
- Electronic Document Act (NN 150/05)
- Electronic Signature Act (NN 10/02)
- Consumer Protection Act - NN 96/03
- Competition Protection Act - NN 122/03
- Food Act – NN 117/03, 130/03, 48/04

Ordinances

- Rules on the Form and Method of Running Merchandise Inventories in Retail Trade - NN 73/02, 79/02
- Rules on Minimum Technical Requirements for Premises on which Trade and Trade Intermediation are Carried Out, and on Requirements for Sale outside Premises - NN 37/98, 73/02, 153/02
- Rules on Admissible Losses due to Spillage, Dispersal, Damage and Breakage on Products / for legal entities / - NN 57/98, 81/02, 203/03
- Rules on General Food Declaration or Labelling – NN 114/04, 128/04
- Rules on Method and Procedure of Estimating the Product Quality, for which products a special attestation is necessary – NN 9/00
- Rules on Packaging and Packaging Waste - NN 97/05

- Uredba o posebnim uvjetima za obavljanje trgovine na veliko i trgovine s inozemstvom za određenu robu - NN br. 16/02, 129/04, 121/06, 20/07
- Uredba o određivanju robe koja se izvozi i uvozi na temelju dozvola NN br. 67/03, 83/03, 121/03, 198/03, 127/06.

Uzance

- Posebne uzance u trgovini robom na malo - NN br. 16/95

Kolektivni ugovor

- Kolektivni ugovor za djelatnost trgovine - NN br. 41/98, 75/05, 79/05

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UDRUŽENJE TRGOVINE

Sukladno Nacionalnoj klasifikaciji djelatnosti Udruženje trgovine uključuje članice Hrvatske gospodarske komore iz:

- G 51 - trgovina na veliko i posredovanje u trgovini, osim trgovine motornim vozilima i motociklima i razreda 52.46 Trgovina na veliko farmaceutskim proizvodima
- G 52 – trgovina na malo, osim trgovine motornim vozilima i motociklima i skupine 52.7 - popravka predmeta za osobnu uporabu i kućanstvo

Organizacijska shema Udruženja:

1. Vijeće Udruženja trgovine /39 člana/
2. Predsjednica Udruženja trgovine:
   Ljerka Puljić, Agrokor d.d., Zagreb
3. Zamjenik predsjednice Udruženja trgovine:
   Željko Vugrić, CBA Internacional d.o.o., Zagreb
4. Dopredsjednici Udruženja trgovine:
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   Vjekoslav Gucić, Getro d.d., Zagreb- Sesvete
   Ana Đurok, Slavonijatekstil d.d., Osijek
   Ivica Katalenić, Trgocentar d.d., Virovitica
   Ivan Katavić, KTC d.o.o., Križevci
   Darko Knez, Konzum d.d., Zagreb
   Mijo Šimić, Tekstilpromet d.d., Zagreb
   Antonio Vuksan-Ćusa, Ultra gros d.o.o., Zagreb
5. Poslovna tajnica Udruženja trgovine:
   Dubravka Aunedi, Sektor za trgovinu HGK

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Udruženje trgovine učlanjeno je u europsku trgovinsku asocijaciju EuroCommerce /The Retail, Wholesale, and International Trade Representation to the EU/ sa sjedištem u Brusselsu.

Nacionalna klasifikacija djelatnosti - područje G

G Trgovina na veliko i malo; popravak motornih vozila i motocikla te predmeta za osobnu uporabu i kućanstvo
G 50 Trgovina motornim vozilima i motociklima; održavanje i popravak motornih vozila i motocikla; trgovina na malo motornim gorivima i mazivima
G 51 Trgovina na veliko i posredovanje u trgovini, osim trgovine motornim vozilima i motociklima
G 52 Trgovina na malo, osim trgovine motornim vozilima i motociklima; popravak predmeta za osobnu uporabu i kućanstvo

Regulations

- Regulation on Measures for the Prevention of Illicit Sale at Marketplaces and in Other Open-Air Spaces - NN 69/01
- Regulation on Special Requirements for Retail Trade in Specific Types of Shops - NN 105/01
- Regulation on Special Requirements for Wholesale Trade and International Trade in Specific Types of Merchandise - NN 16/02, 129/04, 121/06, 20/07
- Regulation on Determination of the Goods for Export/ Import on the Basis of Special Permits - NN 67/03, 83/03, 121/03, 198/03, 127/06

Practices

- Special Practices for Retail Trade - NN 16/95

Collective agreements

- Collective Agreement for the Trade Sector - NN 41/98

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TRADE ASSOCIATION

According to the National Classification of Economic Activities, the Trade association includes members of Croatian Chamber of Economy from:

- G 51 - Wholesale trade and trade intermediation, excluding trade in motor vehicles and motorcycles and class 52.46 - wholesale trade in pharmaceutical products
- G 52 - Retail trade, excluding trade in motor vehicles and motorcycles and class 52.7 - repair of personal items and household objects

Bodies of the Trade Association:

1. Council of the Trade Association /39 members/
2. President of the Trade Association:
   Ljerka Puljić, Agrokor d.d., Zagreb
3. Deputy President of the Trade Association:
   Željko Vugrić, CBA Internacional d.o.o., Zagreb
4. Vice-Presidents of the Trade Association:
   Nevenka Bečić, Kerum d.o.o., Split
   Vjekoslav Gucić, Getro d.d., Zagreb- Sesvete
   Ana Đurok, Slavonijatekstil d.d., Osijek
   Ivica Katalenić, Trgocentar d.d., Virovitica
   Ivan Katavić, KTC d.o.o., Križevci
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Trade Sector at Croatian Chamber of Economy Trade Association is a member of European Trade Association EuroCommerce /The Retail, Wholesale and International Trade Representation to the EU/ with headquarters in Brussels.

National Classification of Economic Activities (NCEA)- Section G:

G Wholesale and retail trade; repair of motor vehicles, motorcycles, and personal items and household objects
G 50 Trade in motor vehicles and motorcycles; maintenance and repair of motor vehicles and motorcycles; retail trade in motor fuels and lubricants;
G 51 Wholesale trade and trade intermediation, excluding trade in motor vehicles and motorcycles
G 52 Retail trade, excluding trade in motor vehicles and motorcycles; repair of personal items and household objects;

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