HRVATSKA GOSPODARSKA KOMORA *SEKTOR ZA TRGOVINU*

CROATIAN CHAMBER OF ECONOMY *TRADE DEPARTMENT*

DISTRIBUTIVNA TRGOVINA

UVOD

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

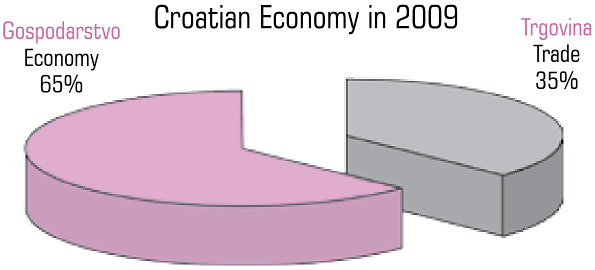
Distributivna trgovina ima veliko značenje u gospodarstvu Hrvatske jer u toj djelatnosti posluje 35 posto gospodarskih subjekata, zapošljava oko 18 posto ukupnog broja zaposlenih te je njen udio u BDP-u 2009. godine bio 9,5 posto.

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 trgovina te globalizacija.

Budući razvoj distributivne trgovine ovisit će o njenoj sposobnosti prilagodbe zahtjevima tržišta, ali i o zakonodavstvu koje se kontinuirano dograđuje s ciljem stvaranja pravnog okvira za razvoj ove djelatnosti.

POSLOVNI SUBJEKTI - udio distributivne trgovine u gospodarstvu RH u 2009.

BUSINESS ENTITIES - Trade Share of Croatian Economy in 2009



Izvor: DZS; Obrada: HGK

Source CBS; Compiled by: CCE

POSLOVNI SUBJEKTI, PRODAVAONICE I ZAPOSLENI

U distributivnoj trgovini u Hrvatskoj 2009. godine bilo je aktivno 32.589 poslovnih subjekata - 14.063 trgovačka društva i 18.526 obrtnika.

Od ukupno 40.802 prodavaonice 22.908 su prodavaonice trgovačkih društava, a 17.894 prodavaonice obrtnika.

DISTRIBUTIVE TRADE

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 from the manufacturer to delivery to the consumer.

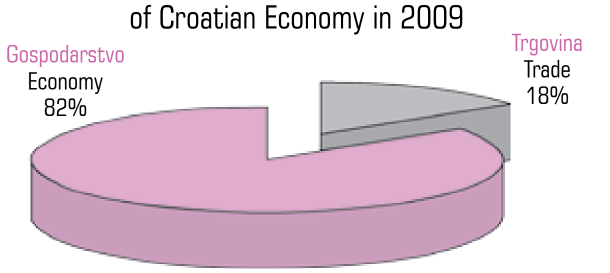
Distributive trade holds a significant place in Croatian economy as in this business 35% of economic agents operate; it employs about 18% of workforce. Its share of GDP amounted to 9.5% in 2009.

Trade is facing major challenges, such as stronger competition in the local market, concentration and take-overs, introduction of new technology, new forms of retail trade, e-commerce and globalisation.

The future development of distributive trade will depend on its ability to adapt to market demands and to legislation, which is constantly updated with the aim of creating a legal framework for the development of this activity.

ZAPOSLENI - udio distributivne trgovine u gospodarstvu RH u 2009.

PERSONS IN EMPLOYMENT - Trade Share of Croatian Economy in 2009



Izvor: DZS; Obrada: HGK

Source CBS; Compiled by: CCE

BUSINESS ENTITIES, SHOPS AND EMPLOYMENT

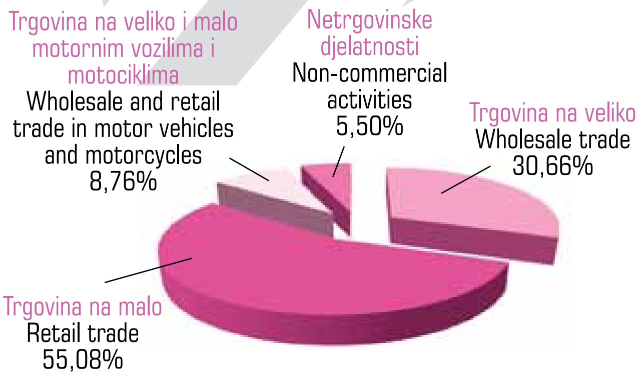
In the distributive trade in 2009, there were 32,589 active business entities in Croatia; 14,063 of them companies and 18,526 tradesmen. Of a total 40,802 stores, 22,908 were company stores and 17,894 tradesmen's stores.

Distributive trade is the second largest employer in Croatia

Distributivna trgovina je drugi po veličini poslodavac (odmah iza prerađivačke industrije) te jedan od najvećih generatora novih radnih mjesta. U distributivnoj trgovini 2009. su godine bila 223.872 zaposlena, u trgovačkim društvima 185.244, a kod obrtnika 38.628. U djelatnostima distributivne trgovine najviše je zaposlenih radilo u trgovini na malo (G47) odnosno zapošljavala je 55,08 posto zaposlenih, potom slijedi trgovina na veliko (G46) s udjelom od 30,66 posto zaposlenih, te trgovina motornim vozilima i motociklima (G45) s udjelom od 8,76 posto. U netrgovinskim djelatnostima radilo je 5,5 posto zaposlenih.

after the processing industry, as well as the biggest generator of new jobs. In 2009, there were 223,872 employed persons, of which 185,244 were in companies and 38,628 in craft businesses. Retail trade (activity G47) had the largest numbers of employed 55.08%. It is followed by wholesale trade (G46) - 30.66%, and motor vehicles and motorcycles trade (G45) - 8.76%. The non-commercial activities had 5.5% of employment.

STRUKTURA BROJA ZAPOSLENIH U DISTRIBUTIVNOJ TRGOVINI PREMA PRETEŽNOJ DJELATNOSTI POSLOVNOG SUBJEKTA PO NKD-U U 2009. / PERSONS EMPLOYED IN DISTRIBUTIVE TRADE BREAK-DOWN BY DOMINANT ACTIVITY OF BUSINESS ENTITY ACCORDING TO NCEA FOR 2009



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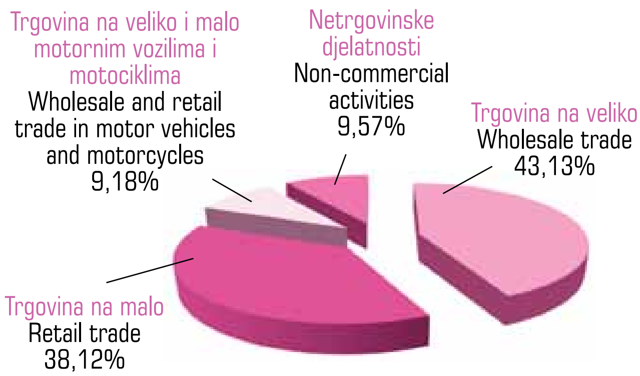
STRUKTURA PROMETA DISTRIBUTIVNE TRGOVINE PREMA PRETEŽNOJ DJELATNOSTI POSLOVNOG SUBJEKTA PO NKD-U U 2009. / TURNOVER IN DISTRIBUTIVE TRADE BY DOMINANT ACTIVITY OF BUSINESS ENTITIES ACCORDING TO NCEA FOR 2009



Izvor: DZS; Obrada: HGK — Source CBS; Processing: CCE

PROMET

U distributivnoj trgovini 2009. je ostvaren promet 252,05 milijardi kuna. Od toga su trgovačka društva ostvarila 241,75 milijardi kuna prometa, a obrtnici 10,30 milijardi kuna.
Prema strukturi ukupno ostvarenog prometa distributivne trgovine prevladava trgovina na veliko sa 43,13 posto udjela, slijedi trgovina na malo sa 38,12 posto, potom trgovina na veliko i malo motornim vozilima i motociklima sa 9,18 posto udjela, a u netrgovinskim je djelatnostima ostvareno 9,57 posto ukupnog prometa.

KARAKTERISTIKE MALOPRODAJNE MREŽE

Hrvatsku maloprodajnu mrežu još obilježava usitnjenost odnosno dominacija malih prodavaonica površine do 100 četvornih metara. No, velike prodavaonice razvijaju se i u našoj zemlji ubrzanim tempom jer su primjerene promjenama u načinu življenja i novim potrebama kupaca. Najnoviji razvojni trend ide u smjeru gradnje modernih trgovačkih centara koji pružaju različite pogodnosti kupnje i zabave pod jednim krovom te postaju mjesta društvenih okupljanja. Prema procjeni Sektora za trgovinu HGK, u posljednjih petnaestak godina u Hrvatskoj je sagrađeno više od 2.000.000 četvornih metara maloprodajnog prostora velikih prodajnih površina odnosno prodajne površine veće od 1000 četvornih metara. Gradnja trgovačkih kapaciteta u Hrvatskoj je proces koji je zasad obilježen teritorijalnom koncentracijom većih prodavaonica u većim županijskim središtima, Zagrebu, Splitu, Rijeci, Zadru i Osijeku. Prema broju novosagrađenog maloprodajnog prostora u 2009. godini dominira grad Zagreb i Zagrebačka županija, međutim trgovački centri šire svoje poslovanje i u

TURNOVER

Distributive trade in 2009 generated a turnover of HRK 252.05 billion, of that the companies have generated HRK 241.75 billion (VAT), and craftsmen HRK 10.30 billion.
A dominant role in the structure of the total achieved distributive trade turnover is wholesale and intermediation trade with 43.13% share, followed by retail with 38.12%, trade in motor vehicles and motorcycles trade with a 9.18%, while non-commercial activities generated 9.57% of total turnover.

RETAIL NETWORK AND RETAIL MARKET CHARACTERISTICS

The retail network in Croatia is still fragmented, being dominated by small shops, with an area under 100 sq m. However, large retail establishments figure more and more prominently due to changes in the way of life and new customer needs. The latest development trend is moving in the direction of construction of modern shopping centres that provide various shopping services and entertainment in one place. They are becoming places for socialising. Based on the estimate of the CCE Trade Department, over 2,000,000 sq. m. of large retail facilities with more than 1,000 sq. m. of selling space have been built in Croatia over the past 15 years. The construction of trade facilities in Croatia is a process characterised by territorial concentration of large outlets in larger county hubs – Zagreb, Split, Rijeka, Zadar and Osijek. Regarding the number of newly constructed retail outlets in 2009, the city of Zagreb and Zagreb County are leading. However, shopping centres are extending their business activities to other county centres. According to plans, this year and the

BROJ POSLOVNIH SUBJEKATA, PRODAVAONICA, ZAPOSLENIH I PROMET PREMA PRETEŽITOJ DJELATNOSTI POSLOVNOG SUBJEKTA U 2009. NUMBER OF BUSINESS ENTITIES, OUTLETS, PERSONS IN EMPLOYMENT AND TURNOVER BY DOMINANT ACTIVITY OF BUSINESS ENTITY - 2009				
	Broj poslovnih subjekata No. of business entities	Broj prodavaonica / servisa No of outlets / service points	Zaposleni Persons in employment	Ostvareni promet u milijardama kuna s PDV-om Achieved turnover in billions of HRK, incl. VAT
Ukupno / Total	32.589	40.802	223.872	255,05
Pravne osobe / Legal entities	14.063	22.908	185.244	241,75
Obrtnici / Tradesmen	18.526	17.894	38.628	10,30
G 45 – ukupno / Total	4.640	5.877	19.613	23,13
Pravne osobe / Legal entities	1.447	1.835	12.397	21,7
Obrtnici / Tradesmen	3.193	4.042	7.216	1.43
G 46 – ukupno / Total	9.466	5.412	68.646	108,71
Pravne osobe / Legal entities	7.882	4.527	65.327	107,30
Obrtnici / Tradesmen	1.584	885	3.319	1,41
G 47 – ukupno / Total	18.046	26.957	123.309	96,08
Pravne osobe / Legal entities	4.297	13.990	95.216	88,63
Obrtnici / Tradesmen	13.749	12.967	28.093	7,45
Netrgovinske djelatnosti / Non-trading activities	437	2.556	12.304	24,11
Pravne osobe / Legal entities	437	2.556	12.304	24,11
Obrtnici / Tradesmen	-	-	-	-

Izvor: Priopćenja Državnpg zavoda za statistiku; Obrada: HGK — Source: CBS – First Release; Processing: CCE

druga županijska središta. Ove i sljedeće godine u Zagrebu, široj okolici, ali i ostalim gradovima Hrvatske, prema planovima trebalo bi se sagraditi desetak novih trgovačkih centara.

STRUKTURA TRŽIŠTA PO TIPOVIMA FORMATA

Struktura tržišta po tipovima formata u Hrvatskoj je već nekoliko godina stabilna. Najveći vrijednosni udio na maloprodajnom tržištu RH zauzimaju male trgovine s udjelom od 32 posto. No, nastavlja se trend povećavanja udjela hipermarketa na maloprodajnom tržištu, pa je tako njihov udio u strukturi tržišta po formatima 2009. bio 21 posto. Udio supermarketa 2009. bio je 28 posto, cash&carry prodavaonica 5 posto, diskontnih prodavaonica 5 posto te ostalih prodajnih kanala 8 posto.

following one some 10 new shopping centres are to be built in Zagreb , its wider surroundings as well as in other Croatian cities.

STRUCTURE OF MARKET BY SIZE TYPES

Regarding the market structure based on the size types, the structure in Croatia has been stable for several years now. The largest share of 32% in the retail market in Croatia is still held by small shops. On the other hand, hypermarkets and supermarkets are steadily increasing their retail market share; their share in 2009 was 21%. The share of supermarkets in 2009 was 28%, cash & carry 5% and discount shops 5%, as well as other sales channels (8%).

STRUKTURA TRŽIŠTA PO TIPOVIMA FORMATA U RH
STRUCTURE OF MARKET BY SIZE TYPE

	2001.	2002.	2003.	2004.	2005.	2006.	2007.	2008.	2009.
Hipermarketi / Hypermarkets	6,0	9,0	10,0	13,0	16,0	17,0	17,1	18	21
Supermarketi / Supermarkets	29,0	33,0	35,0	33,0	34,0	32,0	32,1	31	28
Cash&carry / Cash&carry	6,0	8,0	11,0	9,0	9,0	9,0	7,5	6	5
Male trgovine / Small shops	53,0	45,0	40,0	40,0	39,0	37,0	34,6	34	32
Ostalo / Other	6,0	5,0	4,0	5,0	2,0	5,0	8,7	7	8
Diskonti / Discount shops	-	-	-	-	-	-	--	4	5
	100	100	100	100	100	100	100	100	100

Izvor: GFK, Obrada HGK — Source: GFK, Processing CCE

GLAVNE KARAKTERISTIKE MALOPRODAJNOG TRŽIŠTA

MAIN CHARACTERISTICS OF RETAIL MARKET

TRŽIŠNI UDIO VODEĆIH TRGOVACA HRANOM U REPUBLICI HRVATSKOJ
MARKET SHARE OF LEADING FOOD RETAILERS IN CROATIA

	2002.	2003.	2004.	2005.	2006.	2007.	2008.	2009.
Konzum	9,4	15,1	19,5	21,2	21,5	22,6	24,3	25,8
Kaufland	1,8	3,0	4,8	5,4	6,0	7,4	7,3	7,7
Plodine	N/A	N/A	1,8	2,9	3,9	4,2	4,6	5,4
Lidl	-	-	-	-	0,2	2,7	4,1	5,3
Billa	4,4	5,0	5,0	6,7	7,7	6,6	5,7	5,2
Mercator	3,1	2,1	2,1	2,4	4,1	5,8	5,4	4,9
Presoflex	2,3	2,3	2,0	1,8	2,6			
dm – drogerie markt	N/A	N/A	1,9	2,5	2,3	2,3	2,9	3,9
Getro	7,6	8,0	7,6	7,2	6,3	4,6	3,6	2,9
KTC	5,4	6,7	4,8	4,5	4,5	4,1	3,0	2,9
Kerum	1,5	1,2	1,9	2,5	2,4	2,2	2,5	2,8
Dinova – Diona	N/A	N/A	0,8	1,7	1,6	1,9	2,2	2,4
Metro	0,7	1,4	1,7	1,8	2,2	2,4	2,4	2,3
Tommy	N/A	N/A	2,3	2,0	2,4	2,2	2,0	2,0
Interspar	-	-	-	-	0,4	1,4	1,4	1,8
UKUPNO / TOTAL	37,1	45,3	57,8	64,0	68,1	70,3	71,4	75,3
Ostale trgovine / All other outlets	62,9	54,7	42,2	36,0	31,9	29,7	28,6	24,7
NTL	-	-	8,0	9,2	11,3	6,3	6,7	7,2
CBA	N/A	N/A	7,5	7,1	5,0	5,7	4,8	5,6
Ultra gros	N/A	N/A	N/A	N/A	N/A	2,9	3,3	3,1

Udio Mercatora prikazan bez Ere Tornado i Trgohita/2005./, Udio Mercatora uključujući ova dva lanca 4,6%
- u svibnju 2007. Mercator je preuzeo Presoflex
- u 2010. godini Mercator je preuzeo Getro d.d.
- 2009. Cba udruženje pristupilo je Narodnom trgovačkom lancu

Mercator share is presented without Era Tornado and Trgohit/2005/, Mercator share including these two chains 4.6%
- in May 2007 Mercator took over Presoflex
- in 2010 Mercator took over Getro d.d.
- 2009 Cba asscoation joined the People's Trade Chain

Glavne karakteristike hrvatskoga maloprodajnog tržište su koncentracija, internacionalizacija i konsolidacija. Udio deset vodećih trgovaca prije sedam godina bio je oko 16,6 posto, a 2009. godine 15 trgovaca drži 75,3 posto tržišta. No, valja naglasiti kako koncentracija nije nikakva hrvatska specifičnost jer u većini europskih država prvih 10 trgovca drže od 60 do 80, pa i do 90 posto tržišta. Tako primjerice u Slovačkoj vodećih deset drži 70 posto ukupnog tržišta, a u rangu Hrvatske je Mađarska sa 67 posto dok u Sloveniji prvih 5 trgovaca drži 90 posto tržišta.
Ni internacionalizacija trgovine nije hrvatska specifičnost. Taj je proces padom Berlinskog zida ubrzano tekao u tranzicijskim zemljama poput Mađarske, Poljske i Češke. U vezi s tim promjenama na tržištu svjedoci smo sve veće konsolidacije koja rezultira preuzimanjem i strateškim povezivanjem pojedinih trgovaca.

The main characteristics of the Croatian retail market are concentration, internationalisation and consolidation. The share of the top 10 traders was some 16.6% seven years ago, while in 2009, 15 traders maintained 75.3% of the market. However, concentration is not specific only to Croatia since the example of the majority of European countries shows that the top 10 traders have from 60% to 80%, even 90% of market share. In Slovakia, for example, the leading 10 traders hold 70% of the market; Hungary is similar to Croatia with 67% while the Slovenian top 5 traders have 90% of the market.
Internationalisation is also not characteristic exclusively to Croatia. This process has sped up in transition countries such as Hungary, Poland, and the Czech Republic etc. with the fall of Berlin Wall. In connection with these market reorganisations, we are witnessing more increasing market consolidation resulting in takeovers and strategic alliances of specific retailers.

POTROŠAČKE NAVIKE U MALOPRODAJI

- Osnovni razlozi odlaska u kupovinu u određenu trgovinu su širina ponuđenog asortimana, blizina stanovanja te prihvatljivost cijena
- Promotivne letke prima više od 85 posto ispitanika. Oko 50 posto ih pročita, a oko 15 posto izjasnilo se da doista kupuje proizvode promovirane u letcima
- 50 posto kupaca u Hrvatskoj uglavnom često koristi automobil za odlazak u kupovinu, a posebno to čine kada kupuju u tipu trgovine kao što je cash&carry i hipermarket
- Više od 50 posto ispitanih potrošača kupuje neke privatne marke, a oko 15 posto su redoviti kupci tih proizvoda
- Preferencije potrošača kod odabira mjesta kupovine prehrambenih proizvoda pokazuju da potrošači najčešće kao mjesto kupnje odabiru supermarket (47 posto), zatim malu trgovinu (23 posto), hipermarket odabire 15 posto, diskont 2 posto, a ostatak odabire ostale maloprodajne oblike.

Izvor podataka: Istraživanje GFK, Zagreb

AKTUALNO O DJELATNOSTI TRGOVINE - OPTIMIZAM, POKRETAČ POTROŠNJE I UKUPNOG GOSPODARSTVA

Proteklih dvadesetak godina trgovina je jedna od najrazvijenijih, najkonkurentnijih i najpropulzivnijih grana gospodarstva. Posljednje desetljeće domaću su trgovinu obilježile velike investicije, rast potrošnje, rast prometa, potrošački boom, razvoj moderne trgovačke mreže te koncentracija tržišnog udjela. Valja napomenuti kako je riječ o trendovima koji su u skladu s ostalim tranzicijskim zemljama. No, Hrvatska je dio svjetskog i europskog tržišta, pa je već 2008. došlo do određenih poremećaja kao posljedice globalnih kretanja. Takva kretanja nastavljena su i 2009. godine, da bi se u prvom tromjesečju ove godine nakon 17 mjeseci pada osjetio blagi oporavak tržišta. Naime, sva ova kretanja dovela su do promjena u osnovnim trendovima u maloprodaji. Tako je uočeno da trgovački lanci bilježe porast prodaje osnovnih životnih namirnica, smanjuje se vrijednost pojedinačne kupnje, raste udio prodaje na promocijama, raste udio prodaje privatnih robnih marki. Aktualna kretanja dovela su i do mijenjanja navika/ponašanja potrošača, pa tako sve više građana prati i kupuje na akcijskim prodajama. Nedvojbeno je kako je aktualno gospodarsko stanje na tržištu dovela do određenih promjena u navikama potrošača te da se kupci ponašaju racionalnije, ali je poželjno pozitivnijim javnim komuniciranjem potaknuti njihov optimizam. Valja naglasiti i važnost isticanja pozitivnih trendova u djelatnosti trgovine na malo jer je upravo trgovina prva u kontaktu s potrošačima te osjeti svaku promjenu u njihovim navikama odnosno odmah reagira na očekivanja

CONSUMER HABITS IN RETAIL TRADE

- The main reason for selecting a location for shopping are closeness to home or workplace, acceptable prices especially in terms of products of local origin, as well as the range of offered products
- More than 85% of customers/survey participants receive advertising leaflets, 50% of them read them and about 15% explained that they actually buy products advertised in leaflets
- 50% of customers do their shopping mostly by car, particularly when they do their shopping in shops such as cash & carry and hypermarkets
- More than 50% of surveyed customers buy some private brands, about 15% on a regular basis
- Consumers' Preferences while choosing the place for food products buying, shows that consumers generally choose supermarkets (47%), small shops (23%), hypermarkets (15%), discounts (2%), and the others choose other retail formats.

Source:GfK Centre for Market Research

NEWS ON TRADE ACTIVITIES – OPTIMISM, THE GENERATOR OF CONSUMPTION AND TOTAL ECONOMY

For the past 20 years, trade has been one of the most developed, most competitive and fastest growing economic branches. The past decade of the local trade has been marked by large investment, consumption and turnover growth, consumer boom, development of the modern trade network and market share concentration. It needs to be pointed out that these are trends which are in compliance with other transitional countries. However, Croatia is part of the world and European market, and so in 2008 certain disruptions occurred as consequence of the global movements. Such movements continued in 2009, leading to a mild market recovery in the first quarter of this year and after 17 months. All of these movements caused changes in the basic retail trends. It is thus evident that trade chains are registering increased sales of basic food products, values of individual purchasing are decreasing and promotional sales share is growing as well as the share of private trade marks. Current movements lead to changes in the consumers' habits and behaviour. Customers are more rational, but it is desirable to encourage their optimism with more positive public communication. The importance of positive trends in retail needs to be pointed out, since trade is the first one in line to contact the customers, it feels every change in their habits, or it rather reacts instantly to the consumers' expectations. It is necessary to publicly promote the consumers' optimism, since consumption is an

DESET NAJVEĆIH TRGOVAČKIH DRUŠTAVA PREMA OSTVARENOM PRIHODU 2009. GODINE
TOP TEN COMPANIES BASED ON THEIR TURNOVER IN 2009

R.br./No.	G 45	G 46	G 47
1.	P.Z. Auto d.o.o.	Metro Cash &Carry d.o.o.	Konzum d.d.
2.	Renaualt Nissan Hrvatska d.o.o.	Agrokor –trgovina d.d.	OMV Hrvatska d.o.o.
3.	Euroline d.o.o.	Medika d.d.	Tisak d.d.
4.	Autozubak d.o.o.	Prirodni plin d.o.o.	Plodine d.d.
5.	Auto Hrvatska prodajno servisni centri d.o.o.	Pheoenix Farmacija d.d.	Mercator-H d.o.o.
6.	Porsche inter auto d.o.o.	Orbico d.o.o..	Kaufland Hrvatska k.d.
7.	Peugeot Hrvatska d.o.o.	Medical intertrade d.o.o.	Lidl Hrvatska d.o.o. k.d.
8.	Citroen Hrvatska d.o.o.	Euro-petrol	Billa d.o.o.
9.	Man importer Hrvatska d.o.o.	Get nekretnine d.d.	DM-drogerie markt d.o.o.
10.	Grand auto d.o.o.	Žito d.o.o.	Kerum d.o.o.

Izvor: Centar za poslovne informacije HGK
Obrada: Sektor za trgovinu HGK

Source: CCE's Center for Business Information
Processed by: CCE's Trade Department

potrošača. Optimizam potrošača nužno je javno popularizirati jer je potrošnja važna spona u zatvaranju, ali i pokretanju novoga gospodarskog ciklusa

TRENDOVI U HRVATSKOJ TRGOVINI

Glede najnovijih trendova u hrvatskoj trgovini, predviđa se da će se nastaviti koncentracija i konsolidacija trgovine kako kroz vlastiti rast pojedinih trgovaca tako i kroz akvizicije, strateško povezivanje, pa i kapitalno povezivanje. Nastavit će se povećavati kvadratura prodajne površine, jačat će konkurencija te će biti snažnijeg povezivanja proizvodnje i trgovine, posebno putem privatnih marki. U skladu s europskom i svjetskom praksom u trgovini koja nastoji što učinkovitije i uspješnije odgovoriti na potrebe kupaca, i domaća trgovina prati sve trendove, o čemu svjedoči gradnja suvremene trgovačke mreže koja asortimanom, kvalitetom ponude i usluga te 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.

TEMELJNI ZAKONODAVNI OKVIR DISTRIBUTIVNE TRGOVINE

Zakoni

- Zakon o trgovini (NN 87/08, 116/08)
- Zakon o elektroničkoj trgovini (NN 173/03, 67/08, 36/09)
- Zakon o elektroničkoj ispravi (NN 150/05)
- Zakon o elektroničkom potpisu (NN 10/02, 80/08)
- Zakon o zaštiti potrošača (NN 79/07, 79/09)
- Zakon o zaštiti tržišnog natjecanja (NN 122/03)
- Zakon o hrani (NN 46/07)

Pravilnici

- Pravilnik o minimalnim tehničkim i drugim uvjetima koji se odnose na prodajne objekte, opremu i sredstva u prodajnim objektima i uvjetima za prodaju robe izvan prodavaonica (NN 66/09)
- Pravilnik o označavanju, reklamiranju i prezentiranju hrane (NN 41/08)
- Pravilnik o načinu i postupku obavljanja kakvoće proizvoda za koje je potrebno uvjerenje (NN 9/00)
- Pravilnik o ambalaži i ambalažnom otpadu (NN 97/05, 115/05, 81/08, 31/09)
- Pravilnik o klasifikaciji prodavaonica i drugih oblika trgovine na malo (NN 39/09)
- Pravilnik o posebnim uvjetima za obavljanje poslova direktne prodaje putem zastupnika (NN 102/09)
- Pravilnik o načinu isticanju maloprodajne cijene i cijene za jedinicu mjere proizvoda i usluga (NN 52/10)

Uredbe

- Uredba o mjerama sprečavanja nedopuštene prodaje roba na tržnicama i drugim otvorenim prostorima (NN 69/01)
- Uredba o posebnim uvjetima za obavljanje trgovine na malo u određenim vrstama prodavaonica (NN 105/01)
- Uredba o posebnim uvjetima za obavljanje trgovine na veliko i trgovine s inozemstvom za određenu robu (NN 16/02, 129/04, 121/06, 20/07)
- Uredba o određivanju robe koja se izvozi i uvozi na temelju dozvola (NN 67/03, 83/03, 121/03, 198/03, 127/06)

Naredba

- Naredba o ukidanju naredbe o određivanju proizvoda i usluga za koje se dostavljaju obavijesti o cijenama i maržama radi praćenja (NN 112/07)

Odluka

- Odluka o dopuštenom manjku s naslova kala, rastepa, kvara i loma na proizvodima u trgovini (NN 129/07)

important element of closing and opening of a new economic cycle.

TRADE TRENDS IN CROATIA

With regard to new trends in the Croatian retail network, it is anticipated that trade concentration and consolidation will inevitably continue both through growth of individual traders as well as through acquisitions, strategic and capital alliances; the growth of the usable nett area of outlets is also anticipated: competition will intensify and stronger connection of production and trade will occur especially through private brands.

In accordance with European and international practice in the distributive trade, which seeks to more efficiently and more effectively respond to the needs of customers, local trade follows both the trends. It is shown by the construction of the modern trade network, which can by range and quality of supply and services, as well as by price equally participate in market competition in which it is exposed to wide competition.

BASIC REGULATORY FRAMEWORK FOR DISTRIBUTIVE TRADE:

Laws

- Trade Act (Official Gazette 87/08, 116/08)
- E-commerce Act - NN 173/03, 67/08, 36/09
- Electronic Document Act (NN 150/05)
- Electronic Signature Act (NN 10/02, 80/08)
- Consumer Protection Act (NN 79/07, 79/09)
- Competition Protection Act (NN 122/03)
- Food Act (NN 46/07)

Ordinances

- Rules Defining Minimum Technical and Other Requirements for Sales Establishments, Equipment and Instruments in Sales Establishments, and Requirements for the Sale of Merchandise Outside Shops (NN 66/09)
- Rules on food labelling, advertising and presentation – NN 41/08
- 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, 115/05, 81/08, 31/09
- Rules on Stores Classification and other forms of Retail sale (NN 39/09)
- Rules on Special Conditions for Performing Activities of Direct Sale Through Representatives
- Rules on Pointing Out Retail Prices and Prices for Unit Measure of Products and Services (NN 52/10)

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

Ordinance

- Ordinance on termination of ordinance on defining products and services for which information on prices and margins are submitted due to monitoring – NN 112/07

Decision

- Decision on admissible deficit due to ullage, spillage, breakage and defect of products in outlets – NN 129/07

Uzance

- Posebne uzance u trgovini robom na malo (NN 16/95)

Kolektivni ugovor

- Kolektivni ugovor za djelatnost trgovine (NN 41/98, 75/05, 79/05)

UDRUŽENJE TRGOVINE

Prema Nacionalnoj klasifikaciji djelatnosti (2007.), Udruženje trgovine uključuje članice Hrvatske gospodarske komore iz:

- G 45 – Trgovina na veliko i na malo motornim vozilima i motociklima; popravak motornih vozila i moticikala
- G 46 – Trgovina na veliko, osim trgovine motornim vozilima i motociklima
- G 47- Trgovina na malo, osim trgovine motornim vozilima i motociklima

Organizacijska shema Udruženja

1. Vijeće Udruženja trgovine (36 članova)
2. Predsjednica Udruženja trgovine:
   Ljerka Puljić, Agrokor d.d., Zagreb
3. Dopredsjednici Udruženja trgovine:
   Nevenka Bačić, Kerum d.o.o., Split
   Mijo Šimić, Tekstilpromet d.d., Zagreb
   Darko Knez, Konzum d.d., Zagreb
   Ivan Katavić, KTC d.o.o., Križevci
   Antonio Vuksan-Ćusa, Ultra gros d.o.o., Zagreb
4. Direktorica Sektora za trgovinu
   Milica Rakuša Martulaš
   Rooseveltov trg 2, Zagreb
   Tel. 01/ 4561-624
   Fax: 01/ 4828-499
   E-mail: mrakusa@hgk.hr
5. Poslovni tajnik i osoba za kontakt Udruženja
   Sektor za trgovinu
   Ivona Bačelić Grgić, viša stručna suradnica
   Rooseveltov trg 2, Zagreb
   Tel.: +385 (0)1/ 4561-709
   Fax: +385 (0)1/ 4826-348
   E-mail: ibacelic@hgk.hr

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

Sjedište Udruženja trgovine:
Rooseveltov trg 2, 10000 Zagreb
Tel. +385 (0)1 4561-709, 4561-624
Fax: +385 (0)1 4826-348, 4828-499
E-mail: trgovina@hgk.hr, ibacelic@hgk.hr
www.hgk.hr

Nacionalna klasifikacija djelatnosti-područje G

G **Trgovina na veliko i malo, popravak motornih vozila i motocikla**

G 45 – Trgovina na veliko i na malo motornim vozilima i motociklima; popravak motornih vozila i moticikala
G 46 – Trgovina na veliko, osim trgovine motornim vozilima i motociklima
G 47 – Trgovina na malo, osim trgovine motornim vozilima i motociklima

Practices

- Special Practices for Retail Trade - NN 16/95

Collective agreements

- Collective Agreement for the Trade Sector - NN 41/98, 75/05, 79/05

TRADE ASSOCIATION

According to the National Classification of Economic Activities (2007), the Trade association includes members of Croatian Chamber of Economy from:

- G 45 - Wholesale trade and retail trade in motor vehicles and motorcycles, repair of motor vehicles and motorcycles
- G 46 - Wholesale trade, excluding trade in motor vehicles and motorcycles
- G 47 - Retail trade, excluding trade in motor vehicles and motorcycles

Bodies of the Trade Association:

1. Council of the Trade Association /36 members/
2. President of the Trade Association:
   Ljerka Puljić, Agrokor d.d., Zagreb
3. Vice-Presidents of the Trade Association:
   Nevenka Bečić, Kerum d.o.o., Split
   Darko Knez, Konzum d.d., Zagreb
   Ivan Katavić, KTC d.o.o., Križevci
   Antonio Vuksan-Ćusa, Ultra gros d.o.o., Zagreb4
4. Trade department CEO
   Milica Rakuša Martulaš
   Rooseveltov trg 2, Zagreb
   Tel.: +385 (0)1 4561-624
   Fax: +385 (0)1 4828-499
   E-mail: mrakusa@hgk.hr
5. Business secretary and Trade Association's contact person
   Trade Department
   Ivona Bačelić Grgić, desk officer
   Rooseveltov trg 2, Zagreb
   Tel.: +385 (0)1 4561-709
   Fax: +385 (0)1 4826-348
   E-mail: ibacelic@hgk.hr

Trade Association is a member of European Trade Association EuroCommerce /The Retail, Wholesale and International Trade Representation to the EU/ with headquarters in Brussels.

Trade Association Headquarters:
Rooseveltov trg 2, 10000 Zagreb
Tel.: +385 (0)1 4561-709
+385 (0)1 4561-624
Fax: +385 (0)1 4826-348, 4828-499
E-mail: trgovina@hgk.hr, ibacelic@hgk.hr
www.hgk.hr

National Classification of Economic Activities - Section G:

G **Retail and wholesale; repair of motor vehicles and motorcycles**

G 45 - Wholesale trade and retail trade in motor vehicles and motorcycles, repair of motor vehicles and motorcycles
G 46 - Wholesale trade, excluding trade in motor vehicles and motorcycles
G 47 - Retail trade, excluding trade in motor vehicles and motorcycles

HRVATSKA GOSPODARSKA KOMORA
SEKTOR ZA TRGOVINU
Direktorica:
Milica Rakuša-Martulaš
Kontakt osoba:
Ivona Bačelić Grgić, viša stručna suradnica

Rooseveltov trg 2
HR-10000 ZAGREB
Tel.: +385 (0)1 4561-555, 4561-664
Fax: +385 (0)1 4828-380, 4828-499
E-mail: trgovina@hgk.hr; ibacelic@hgk.hr

CROATIAN CHAMBER OF ECONOMY
TRADE DEPARTMENT
Managing Director:
Milica Rakuša-Martulaš
Contact Person:
Ivona Bačelić Grgić, Desk Officer

Rooseveltov trg 2
HR-10000 ZAGREB, CROATIA
Tel.: +385 (0)1 4561-555, 4561-664
Fax: +385 (0)1 4828-380, 4828-499
E-mail: trgovina@hgk.hr; ibacelic@hgk.hr

HRVATSKA GOSPODARSKA KOMORA
SREDIŠNJICA
Rooseveltov trg 2
p.p. 630
HR-10000 ZAGREB
Tel.: +385 (0)1 4561-555
Fax: +385 (0)1 4828-380
E-mail: hgk@hgk.hr
www.hgk.hr

CROATIAN CHAMBER OF ECONOMY
HEADQUARTERS
Rooseveltov trg 2
p.p. 630
HR-10000 ZAGREB, CROATIA
Tel.: +385 (0)1 4561-555
Fax: +385 (0)1 4828-380
E-mail: hgk@hgk.hr
www.hgk.hr

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