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Bosnia-Herzegovina

Exporter Guide

Annual

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Report Highlights:

Bosnia and Herzegovina (BiH) imports around 65 percent of its overall food needs. The market for processed foods focuses on value rather than quality as consumers seek to obtain the most for their money. Food import tariffs are low compared to other countries in the region. Challenges to exporters include a complicated dual system of government, low incomes, and poor infrastructure. This report contains marketing tips, information on importing foods, a list of upcoming trade shows, and important points of contact.

Includes PSD Changes: No
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I. MARKET OVERVIEW

Economic situation

The economy in Bosnia and Herzegovina (BiH)¹ is still recovering from the 1992-1995 war and from the transition from a socially planned to a market economy. In recent years the economy has been driven by donations from the international community. Since 1996, annual Gross Domestic Production (GDP) growth has averaged 30%, reflecting more the inflow of external assistance than an increase of domestic production. Total GDP grew from \$2.741 billion in 1996 to \$4.7 billion in 2001. Eventually, a decline in GDP will occur unless the rate of domestically fueled economic growth picks-up. BiH remains one of the poorest countries in region with a GDP per capita of just over \$1,089 in 2001, half of pre-war levels. The average net monthly wage in 2002 was \$247 (this figure is higher in the Federation than in the Republika Srpska).

A degree of macro-economic stability has been achieved with the introduction of a Central Bank, the creation of a single currency, the Konvertabilna Marka (Convertible Mark, KM), and the linking of the KM to the Deutsche Mark (and subsequently the Euro). Consequently, inflation has remained comparatively low at around 3.5% per year (in 2003). Macroeconomic stability is maintained via a series of International Monetary Fund – supported programs.

Structure of the economy

In BiH the main economic activity is trade, not production. The BiH trade deficit in 2002 was \$3.245 billion or around 69% of GDP.

The structure of the BiH economy is changing quite slowly. GDP composition by sector in 2001 was: agriculture 13%, industry: 40.9%, services: 46.1%. Industrial production growth rate in 2002 was 7%.

Although there has been a significant growth in the number of registered micro, small and medium enterprises, economic activity is still characterized by the existence of large state owned enterprises. These large enterprises operate with significant losses, at less than full capacity, and with out-dated technology and management techniques.

The official unemployment rate remains high, 41.1% in 2002. It is estimated that an actual unemployment is around half of it, because of the black economy existence.

Privatization and the reform process

Although the Government announced an ambitious reform program in May 1998 and privatization legislation was approved, the privatization process has in general been poorly managed. By in large, only small and medium enterprises have mostly been privatized. Medium and large companies employ between 30-40% of the active labor force and are typically active in

1

According to the Dayton Peace Agreement signed in December 1995, Bosnia and Herzegovina (BiH) is divided into two Entities: the Federation of Bosnia and Herzegovina (F BiH) and Republika Srpska (RS). There is also the Brcko District with a special administrative status. Understanding this dual governmental structure is important to doing business in the country.

textiles and leather, agribusiness, metal and machine building, wood processing and furniture manufacturing.

The privatization process has progressed in 2002, and approximately 40% of total number of enterprises has been privatized.

Business environment

BiH is composed of two entities with significant differences with regard to the business environment. However, there has been little internal effort to create a single market in BiH and significant legislative, regulatory and institutional differences between the Entities persist. The creation of a single economic space is a precondition for the regeneration of the post-war Bosnian economy, the transformation from a planned to a market economy, and greater integration into European and world trade structures. Significant barriers to internal and external trade and foreign direct investment remain, and there are weaknesses in the legal base related to competition, public procurement, financial services, standards and regulations, and the regulation of essential services.

Foreign Trade

Efforts have been made recently to liberalize trade, especially within the Southeast European region. Free trade agreements are signed with many countries in the region (Croatia, Serbia and Montenegro, FYR Macedonia, Slovenia, Albania, Romania, Bulgaria and Moldova) in the framework of an intra-regional trade co-operation.

Total exports grew from \$336 to \$1.122 million from 1996 – 2002, while imports rose from \$1.882 to \$4.367 million in the same period. Agricultural imports represent about 35% of total imports, and about 10% of total exports. The principal trading partners are the EU and the countries of ex-Yugoslavia.

Major trading partners in period 2002²

1. Imports (in million USD):

- Croatia	766,3
- Germany	598
- Slovenia	542,6
- Italy	471,4
- Yugoslavia	390,8
- Austria	276,3
- Hungary	246
- Other countries	2.115

2. Exports (in million USD):

- Yugoslavia	253
- Croatia	188,8
- Germany	159
- Italy	149,4
- Slovenia	105,5;
- Austria	50,6;
- Hungary	7,8
- Other countries	395,8

Croatian, Slovenian, Hungarian, Italian, German and Yugoslav processed food products dominant the market.

The most imported food products in 2001 and 2002 were tobacco products, fruit juices and mineral water and meat.

Imports of U.S. consumer oriented products and seafood products to BiH from 1997- 2001 were minor. Imports of U.S. origin bulk commodities (mostly wheat) are part of a U.S. food donation program to BiH.

Market Opportunities for High-Value Consumer Foods/Beverages and Edible Fishery Products

Challenges to Marketing High Value U.S. Foods in BiH:

- The weak economy affects consumer-purchasing power. An average net wage is lower than in any country in the region and the unemployment rate is high. Therefore, people are more interested in price than in quality.
- Quality control among locally produced and imported products is often poor in part because BiH government laboratories work with out-dated technology and are ill-equipped. Therefore, labeling requirements are often not met and low-quality products may be found on market at that undercut other products.
- There is still a lot of smuggling.
- Fraud and corruption are still a problem, especially in relation to taxation and import duties.

However, high quality U.S. products could find small, but growing market due to the fact that consumers awareness is improving and eventually will result in spending more money on high quality food products.

Some of American companies that have developed good distribution channels in BiH are Wrigley, Kraft and Sara Lee. The most successful American company in BiH is Coca Cola. Coca Cola recently rebuilt a bottling plant in Sarajevo.

Food Expenditures and Consumption

² Sources: BiH Agency of Statistics, FBiH and RS Institutes of Statistics

It is estimated that a four-person family spends on \$3,403 annually (2002 est.) on a ‘basket’ of basic food products. However, the general opinion is that the actual figure is being much higher and there are no reliable official statistics on food consumption. Officially, changes in food expenditures are not significant because the ‘basket’ of basic food products is always the same and the retail prices are quite stable.

Since an average monthly income is less than \$250 and the official unemployment rate is around 40%, many do not have enough money to buy food and, according to official data, one fifth of total population is on the edge of poverty.

Demographic Developments and Impact on Consumer Buying Habits

BiH has a population about 3.7 million and an average BiH household is composed of 3.6 members. A single parent heads slightly over one in ten households. The population growth rate is about 0.48% (2002 est.).

The rural population decreased significantly as the result of the war. Most of the rural population moved to urban areas or went to other countries as refugees and have been slow to return. In some areas, landmines remain a barrier to agricultural production although there is a significant international demining effort.

The number of single households has not increased significantly because many of young people live with their parents. People are also waiting longer before they have children.

Advantages and Challenges for the U.S. Exporters

Advantages

Insufficient domestic food production, imports nearly three times larger than exports
Increased urban population

High quality of U.S. products

Import duties low if compared to other counties in the region

Relatively low costs for introduction and promotion of new products using local broadcast and print media or in-store promotions

Increasing number of large retail supermarkets

Fascination with American culture (language, music, TV shows, fashions) carries over to American food, such as famous “Coca Cola”

Challenges

Long distance, bad transportation conditions, absence of highways, limited railway service
Weak economy affects consumer purchasing power, low average net wage, high unemployment rate

Consumers more interested in price than in quality

Illegally imported and low-quality products compete with legitimately imported foods

Different distribution systems in the two Entities, different taxation system; difficulties in finding a reliable and capable local partner to carry out marketing and distribution

Domestic market flooded with products imported from ex-Yugoslavia neighboring countries and EU countries

Reservations towards GM foods due to a lack of consumer education on the subject and a desire to meet EU requirements

II. EXPORTER BUSINESS TIPS

Local business customs

Finding an agent and/or distributor is the most effective way to market consumer goods. The U.S. Foreign Commercial Service can help you locate qualified distributors. For more information, please see: <http://www.buyusa.gov/bosniaandherzegovina/en/>

The distribution systems are different for the F BiH and the RS because of differing legal frameworks. There have been efforts lately to harmonization rules between the two entities and currently the differences are related mostly to the Entities' tax regimes. It is often necessary to develop relations with distributors in both Entities in order to cover the whole country.

Wholesalers provide will transportation, product storage, market information, financing, and some insurance. Most wholesalers are independent full-function merchant that perform all of the activities associated with importing and distribution. Many wholesalers are engaged in retailing, but there are only few of them that have made significant efforts to develop a retail operation.

Generally, retailers are too small and have too little financial power to control a distribution channel.

General Consumer Tastes and Preferences

Generally speaking, most consumers view price as the primary factor in their food purchasing decision. Preferences tend toward large packages at lower prices. Shopping centers are becoming an increasingly popular retail food sales point. Most of people usually buy nonperishable foods at large supermarket centers once or twice a month. Perishable foods, fruits, vegetables, bread and fresh meat are usually bought at small grocery stores or green markets.

Consumption of red meats is relatively high. There are ongoing outbreaks of animal diseases such as Q fever and classical swine fever although these outbreaks do not appear to have not shaken consumer confidence. BSE and FMD have not been reported in BiH. Traditionally, consumption of beef and veal is the higher than poultry, pork or lamb. Pork consumption is much higher in the RS than in the F BiH because of F BiH's large Muslim population.

A typical Bosnian meal is composed of either red or white meat, potatoes and some other vegetables. Rice is a common dish that on average is eaten once a week. Apples are the most popular fruit. There are only few foreign restaurants (e.g., Italian, Chinese, Mexican). Fish consumption is traditionally low (less than 2 kilograms/year).

The demand for organic foods is quite low. Imported organic foods are usually sold in specialized stores, and are consumed by the ex-patriot community and as a pseudo-medicinal treatment for the sick.

In general, most people prefer to prepare meals at home from fresh food items than buy ready-to-eat and frozen meals. There is the belief that fresh cooked food is healthier and that frozen ready to eat foods are overpriced. Supermarkets do offer ready to eat meals but at relatively high

prices.

There is a small but well off market segment made up of all of the foreigners in BiH (especially in Sarajevo) that work for foreign humanitarian and military organizations.

Food Standards and Regulations

Please refer to FAIRS Report BK 3008 (this report may be downloaded from <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>).

General Import and Inspection Procedures

A prior approval from the Entities' Ministry of Agriculture is required for imports of live animals and all products of animal origin with more than 2 percent of animal component, veterinary drugs, seeds and planting materials or pesticides. Prior approval is not required for other food products.

In the RS, importers do not need prior approval from the Ministry of Agriculture for preserved meat and milk products, milk powder, ice-cream, cheese, butter, fish, crabs, mollusk, skin, wool and feed (a complete list available from the FAS office Sarajevo) if a shipment is accompanied by an international veterinary certificate. For other foods with more than 2 percent of animal origin, prior approval is required (e.g. live animals, semen etc.).

A final import permit for live animals, genetics, seeds and pesticides is to be issued by the national-level Ministry of Foreign Trade and Economic Relations (see V. Key Contacts and Further Information).

All food products must be accompanied with standard documents that follow each shipment and by health certificates issued by relevant authorities of exporting countries (e.g. veterinary certificate for meat and meat products, phytosanitary certificates for fruits, vegetables, seeds etc.) and are subject to veterinary and phytosanitary inspections at border crossings and sanitary and market inspections at customs points.

Sanitary inspectors visually inspect all food for sanitary wholesomeness prior to customs clearance and take samples for laboratory tests. Imported goods are held at the customs point until testing is complete.

Market inspectors at the customs point issue quality certificates. Quality control inspections are done at the exporter/importer's written request, which should be submitted at least 24 hours prior to the customs clearance. The request for quality control must be accompanied with basic documents that follow each shipment, translated into Bosnian/Croatian for the F BiH or into Serbian for the RS. The following information must be provided in the documents: type and name of product, country of origin, exporter's name, manufacturer's name, type and number of transport means, port of loading and unloading, total pieces, packaging unit, gross and net weight and product's quality basic data.

Note: Please refer to FAIRS Report [BK 3008](http://www.fas.usda.gov/scripts/attacherep/default.asp) (this report may be downloaded from <http://www.fas.usda.gov/scripts/attacherep/default.asp>).

III. MARKET SECTOR STRUCTURE AND TRENDS

Domestic Industrial Capacity

Before the war, the food industry was concentrated into large state-owned companies that were also involved in primary agricultural production, processing and wholesale and retail operations. However, at the end of the war, the agro-processing industry was operating at less than 10% of its pre-war capacity due to heavy damage to buildings and equipment. In addition, the raw material supply and sales channels had been disrupted. The agricultural production and the food industry continued to suffer during the transition from a planned to a market economy. Many of pre-war companies are still being privatized and are racking up losses. There are still a few companies that have rebuilt successful fruit, vegetable, and meat processing operations.

In general, the BiH food industry is still too small and inefficient to compete with large foreign industries. Domestic food production is insufficient and covers approx. 30 – 35% of total needs.

Food Retail Sector

In general, small retailers are slowly losing out to large wholesalers with developed retail operations. Large supermarket centers are run by companies such as the Bosnian owned VF Commerce, Slovenian owned Mercator and French owned Interex. Those centers import and distribute food and offer a great variety of fresh fruits and vegetables, fresh meat, exotic and new-to-market foods, and ready-to-eat foods. They also provide good professional service, restaurants with ready meals at favorable prices and lots of fun (performances for kids, clowns, and win prize games/ lottery). Quite often, they organize in-store promotions and tasting of products and provide small gifts with purchased products. A special discount is offered to faithful customers.

Hotel, Restaurant and Institutional (HRI)

Total turnover in catering 1998 –2002³

Year	F BiH		RS	
	Total turnover (000 KM)	Food and beverages share (%)	Total turnover (000 KM)	Food and beverages share (%)
1998	68.831	51.37	41.996	74.27
1999	66.794	54.98	50.566	72.11
2000	68.900	50.70	54.584	69.69
2001	60.784	N/A	48.312	70.58
2002	71.010	N/A	47.917	68.00

HRI prepare meals themselves. They buy ingredients from various suppliers, from small grocery stores and green markets to big producers, retail centers and wholesalers, depending on their size

³ Sources : F BiH and RS Institutes for Statistics

and the number of meals.

There are not many fast food restaurants in BiH.

Promotional/Marketing Strategies

Advertising is a key marketing tool in BiH. Television, radio, and newspapers are the leading advertising media, while magazines, and outdoor advertising rank as second.

Quite often, in-store promotions and informal gatherings are used for presentations of the products. Supermarkets often deliver flyers, informing on their products, prices and special discounts.

Trade events and fairs are probably the best way to market products and services to BiH and to locate partners and distributors. The trade fair sector in BiH has been growing rapidly lately. Fairs provide opportunities for local and foreign companies to establish business connections. Trade events are held throughout BiH. The Sarajevo "Agro-food" fair is the most popular in the F BiH and for the RS the Banja Luka "Food and Beverages" fair. Regional centers like Zenica, Tuzla, Mostar and Bihac are very active in trade promotion. Trade events calendar for 2002 is provided in the Appendix-II.

Internet Sales

Less than 3% of the BiH population use the Internet regularly and food sales, if any, are very small.

IV. BEST HIGH-VALUE PRODUCT PROSPECTS

PRODUCT	2001 IMPORTS (in million KM)	2002 IMPORTS (in million KM)
Tobacco products	98	152
Fruit juices and mineral water	96.6	106.6
Beef	64.7	79.9
Bear	63.6	73.4
Chocolate	58.3	77.9
Coffee	52.3	42
Cheese	35.4	32.5
Biscuits and cookies	30.7	36
Sauces and spices	30	29.2
Seafood	22.2	41.9
Wine	14	16.5
Ice-cream	10.3	11.2
Walnuts, almonds, hazelnuts, pistachios, peanuts	4.5	9.1

Imports of tobacco products increased significantly from the last year, and imports of seafood and nuts are doubled.

V. KEY CONTACTS AND FURTHER INFORMATION

FAS/USDA

US Embassy to BiH

71000 Sarajevo

Bosnia and Herzegovina

Tel.: +387 33 445 700, x2099

Fax: +387 33 212 692

Contact person: Sanela Stanojic

E-mail: StanojicS@usembassy.baHomepage: www.usembassy-vienna.at/usda or <http://www.usis.com.ba/>

F BiH Ministry of Agriculture, Water Management and Forestry

Titova 15

71 000 Sarajevo

Bosnia and Herzegovina

Tel. +387 33 663 659

Fax +387 33 443 338

<http://www.fbihvlada.gov.ba/engleski/index.html>

RS Ministry of Agriculture, Forestry and Water Management

Office in Banja Luka:

Vuka Karadzica 4

78 000 Banja Luka

Tel. +387 51 331 634

Fax +387 51 331 631

Office in Bijeljina:

Miloša Obilica 51

76300 Bijeljina

Tel: +387 55 472 412

Fax: +387 55 472 – 353

<http://www.vladars.net/lt/min/mps.html>E-mail: mps@mps.vladars.net

Ministry of Foreign Trade and Economic Relations

Musala 9

71000 Sarajevo

Contact person: Marijo Perc

Tel. +387 33 663 863 (ext. 239)

Fax: +387 33 220 546

E-mail: perc@bih.net.ba

F BiH Ministry of Trade

Department of Market Inspection

Kneza Domagoja 12

88 000 Mostar

Tel/fax: + 387 36 327 935
<http://www.fbihvlada.gov.ba/engleski/index.html>

RS Ministry of Trade and Tourism
Department of Market Inspection
Vuka Karadi? a 4
51000 Banja Luka
Tel.: + 387 51 308 323
Fax: +387 51 331-499
<http://www.vladars.net/en/min/mtt.html>
E-mail: mtt@mtt.vladars.net

F BiH Ministry of Finance
Alipasina 41
71 000 Sarajevo
Tel.: +387 33 203 147
Fax: +387 33 216 603
<http://www.fbihvlada.gov.ba/engleski/index.html>

RS Ministry of Finance
Vuka Karadca
51000 Banja Luka
Tel: +387 51 331-350
Fax: +387 51 331-351
<http://www.vladars.net/en/min/mf.html>
E-mail: mf@mf.vladars.net

F BiH Custom Administration
M. Mustafe Baseskije br.6
71000 Sarajevo
Tel.: +388 33 279 532
Fax: +387 33 279 616
<http://www.cufbih.com/>

RS Custom Administration
Mladena Stojanovica 7
78 000 Banja Luka
Tel: +387 51 312-009
Fax: +387 51 314-251
<http://www.rucrs.com/sr/index.html>

BiH Chamber of Economy
Branislava Djurdjeva 10
71 000 Sarajevo
Tel. +387 33 663 370 and 663 636
Fax: +387 33 663 632
E-mail: webmaster@komorabih.com

<http://www.komorabih.com/>

F BiH Chamber of Economy
 Branislava Djurdjeva 10
 71 000 Sarajevo
 Tel. +387 33 663 370 and 667 940
 Fax: +387 33 663 632 and 663 635
 E-mail: webmaster@komorabih.com
<http://www.kfbih.com/eng/index.htm>

RS Chamber of Commerce
 Djure Danicica 1/II
 78 000 Banja Luka
 Tel. +387 51 301 908 and 301 838
 Fax: +387 51 301 838
<http://www.pkrs.inecco.net/>

APPENDIX I. STATISTICS⁴

TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	2002	385,4 / 1.9
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	2002	550,3 / 0.05
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	2002	25,4 / 0
Total Population (Millions) / Annual Growth Rate (%)	2002/ 2003	3,828/ 0,48%
Urban Population (Millions) / Annual Growth Rate (%)	n/a	n/a
Number of Major Metropolitan Areas ^{2/}	2002	0
Size of the Middle Class (Millions) / Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)	2001	1,089
Unemployment Rate (%)	2002	41.1%
Per Capita Food Expenditures (U.S. Dollars) ^{3/}	2003	851
Percent of Female Population Employed	2000	34.5%
Exchange Rate	10/10/02	US\$1,00 = 1,65 KM
Footnotes:		
^{1/} No data from UN Trade database was available for BiH. Data on the US market share		

⁴ Sources: BiH Agency of Statistics, FBiH and RS Institutes of Statistics

come from the BICO Reports		
^{2/} There are no metropolitan areas with population in excess of 1,000,000		
^{3/} The figure presents food expenditures for a basket composed of necessary food products.		

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

No data from UN Trade database was available for BiH.

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

No data from UNTrade database was available for BiH.

APPENDIX II. AGRICULTURAL/FOOD FAIRS CALENDAR

F BIH

"AGRO-FOOD" (April).

International Fair of Foods, Beverages and Goods of General Use

Address: CENTER "SKENDERIJA" SARAJEVO

71000 Sarajevo, Terezija bb

Tel: +387 33 61 54 10, 65 85 79, 66 41 63

Fax: +387 33 66 41 65, 65 85 15

E-mail: com.dir@sarajevo-fair.ba

www.sarajevo-fair.ba

"PROMO-INTERNATIONAL" (April)

75000 Tuzla, S. Kunosi? a 18/I

Tel:+387 35 25 21 61, 23 23 42

Fax:+387 35 23 05 20, 23 05 24

E-mail: intermedij_tuzla@ zamir-tz.ztn.apc.org

Plum Fair (Agriculture and Food Processing Industry) (August)

76250 Grada? ac, Huseina K. Gradaš?evi?a 57

Tel:+387 35 81 74 40, 81 71 33

Fax:+387 35 81 74 60

<http://www.gradacackisajam.com.ba/>

"ZEPS 2002 " (October)

Address: POSLOVNI SISTEM RMK d.o.o"

72000 Zenica, Ku? ukovi? i 2/10

Tel:+387 32 41 45 60, 41 46 24

Fax:+387 32 41 47 04, 41 45 92

E mail: marketing@ zeps.com

www.zeps.com

Food and Beverages Fair (April and November)
Address: "GLAS SRPSKI" Banja Luka
Veselina Masleše 13
Tel: 00387 51 211 960
Fax: 51 212 214, 212 758

International Agricultural Fair Banja Luka (October), Tourism and Catering Fair (May) Address:
"METAL" BANJALUKA
78000 Banjaluka, Pilanska bb
Tel: +387 51 211 717
Fax: +387 51 45 301

APPENDIX III LARGE FOOD RETAILER CONTACT INFORMATION

INTEREX
Stupska bb
71000 Sarajevo
Bosnia and Herzegovina
Tel.+387 33 407-185
Fax.+387 33 407-180

VF KOMERC
Put zivota bb
71000 Sarajevo
Bosnia and Herzegovina
Tel. +387 33 650-746, fax 652-783
<http://www.vfkomerc.co.ba/>

Supermarket WISA
Bacici bb
71000 Sarajevo
Bosnia and Herzegovina
Tel. +387 33 429-740, fax 429-742
<http://www.vfkomerc.co.ba/>

Trade centar MERC ATOR
Lozionicka 16
71000 Sarajevo
Bosnia and Herzegovina
Tel. +387 33 656-966, fax 651-725

Tropic-ribarstvo d.o.o.
V.Urosa Drenovica 105
78000 Banja Luka
Bosnia Herzegovina
Tel.+387-51-217-018

Fax:+387-51-217-018
E-mail: tropic@inecco.net
<http://www.tropic.ba/>

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