USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Bosnia and Herzegovina

Exporter Guide

2012 Update

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Report Highlights:
Bosnia and Herzegovina (BiH) imports approximately two-thirds 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 the tariffs in other countries in the region. Challenges to exporters include a complicated dual system of government authorities, low incomes, and poor infrastructure. This report contains marketing tips, information on importing foods, and important points of contact.

Post: Sarajevo

Commodities:

Executive Summary:

Author Defined:

I. Market Overview

Economic situation

The economy in Bosnia and Herzegovina (BiH) is still recovering from the 1992-1995 war and from the transition from a socially planned to a market economy. According to the BiH Central Bank, per capita GDP in 2011 was US$4,228, with a total estimated nominal GDP of approximately US$16.6 billion. The GDP grew by 1.6 percent in 2011. Average monthly net salary is $545 (2011).

A degree of macro-economic stability has been achieved with the introduction of a Central Bank, adoption of the currency board and creation of a single currency, the Konvertabilna Marka (Convertible Mark, KM). The currency board ensures that the KM is fully backed by hard currency or gold, and the exchange rate is fixed at approximately 2 KM to the Euro. Due to a strict currency board regime, inflation has remained relatively low at approximately three percent.

A highly decentralized government hampers economic policy coordination and reform. Government spending, at roughly 50% of GDP, remains high because of redundant government offices at the State, Entity and municipal level. One of BiH's main economic challenges since the recession began has been to reduce spending on public sector wages and social benefits to meet the IMF's criteria for obtaining funding for budget shortfalls. BiH's private sector is growing, but foreign investment has dropped off sharply since 2007, because of the unfavorable investment climate.

The Executive Board of the International Monetary Fund (IMF) on September 26, 2012, approved a 24-month US$520.6 million Stand-By Arrangement for BiH in support of the government’s economic program for 2012–2014. The program aims at countering the effects of the global economic situation and addressing domestic structural weaknesses. The Board’s decision enables the initial disbursement of US$78.1 million with the remaining amount to be phased-in over the duration of the Arrangement, subject to successful completion of quarterly reviews.

BiH's top economic priorities are: acceleration of EU integration, strengthening the fiscal system, public administration reform, World Trade Organization (WTO) membership, and securing economic growth by fostering a dynamic, competitive private sector. To date, work on these priorities has been inconsistent. The country has received a substantial amount of foreign assistance, but must prepare for declining assistance flows in the future. Still regarded as a transition economy, BiH sees the long-term goal of EU membership as a driver to further economic growth and development.

Structure of the economy

The structure of the BiH economy is quite stable. GDP composition by sector is: agriculture 8.3%, industry: 26.3%, services: 65.4% (2011 est.). Industrial production average growth rate in 2011 was 3.1 percent.

Major productive sectors of the economy are industry and mining, telecommunications, construction, trade, transportation, and agriculture. The leading industries are steel, aluminum, minerals, vehicle assembly, textiles, tobacco products, wooden furniture, explosives, munitions, domestic appliances, and oil refining.

In the post-war period, the economic activity was characterized by the existence of large state owned enterprises. These companies operated with significant losses, at less than full capacity, and with out-dated technology and management techniques. Lately, there has been significant growth in the number of registered micro, small and medium enterprises. The private sector share in the GDP is around 60%.

BiH has approximately 1.6 million hectares of land suitable for cultivation. The best prospect sectors are fruit and vegetable, livestock, and poultry. The most important crop is corn followed by wheat and barley. Small, low-output, family farms averaging 2-5 hectares characterize agricultural production along with low input use (fertilizers, chemicals, and certified seeds), poor crop management and post-harvest management practices, and poor railway and road infrastructure. Agriculture contributes about 10 percent to BiH's. For the most part, agricultural production is in the hands of private owners, but farms are small and inefficient. BiH is a net food importer.

The official unemployment rate is approximately 40 percent, although the actual unemployment rate may be closer to 27%, due to the gray economy. BiH's grey economy is relatively large – estimates range is from 20 to 40 percent of GDP.

Business environment

BiH is composed of two entities, the Federation of Bosnia and Herzegovina (F BiH) and the Republika Srpska (RS), each with its own business environment.

Although there has been an effort to create a single market in BiH, significant legislative, regulatory and institutional differences between the Entities persist. Between the two Entities, factors such as business registration requirements and most taxation and standards are separate and different. The creation of a single economic space is a precondition for: the regeneration of BiH's post-war economy; the transformation from a planned to a market economy; and, greater integration into Europe 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

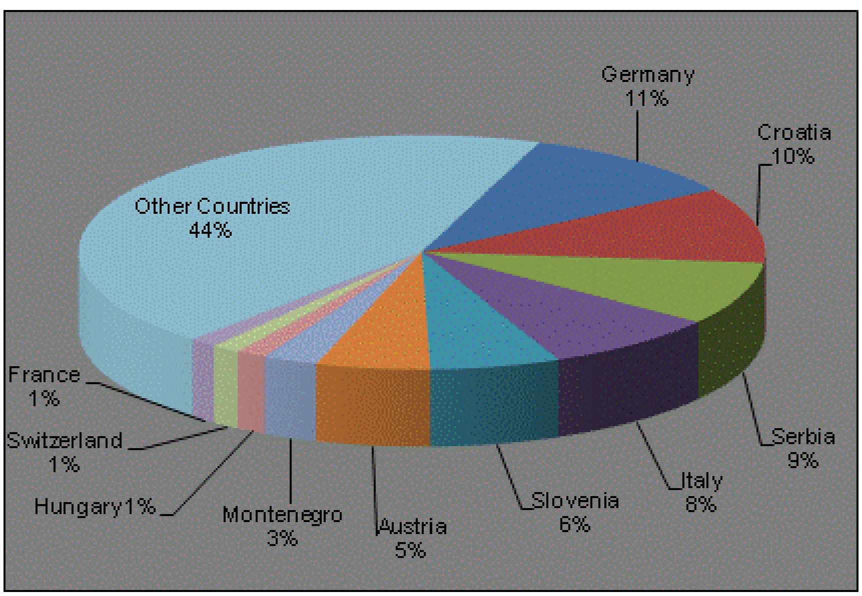
BiH has a large foreign trade deficit with imports almost two times greater than exports. From 2001-2011, total exports increased from $1.07 billion to $5.85 billion, while imports rose from $3.03 billion to $11.04 billion. Agricultural products only represent about 7% of exports, but they represent 20% of total imports. BiH has a liberal trade regime. Bilateral free trade agreements previously signed with many countries in the South-East European region have been replaced with the Central European Free Trade Agreement (CEFTA), which includes Albania, BiH, Croatia, Macedonia, Moldova, Montenegro, Serbia, and Kosovo (UNMIK). The principal trading partners remain the European Union (EU) and the countries of ex-Yugoslavia.

Total Trade (million $)	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Exports	1,071	1,006	1,400	1,912	2,303	3,689	4,252	5,024	3,930	4,804	5,847
Imports	3,034	3,801	4,824	5,981	6,807	7,862	9,529	12,190	8,778	9,220	11,041

Source: BiH Agency for Statistics

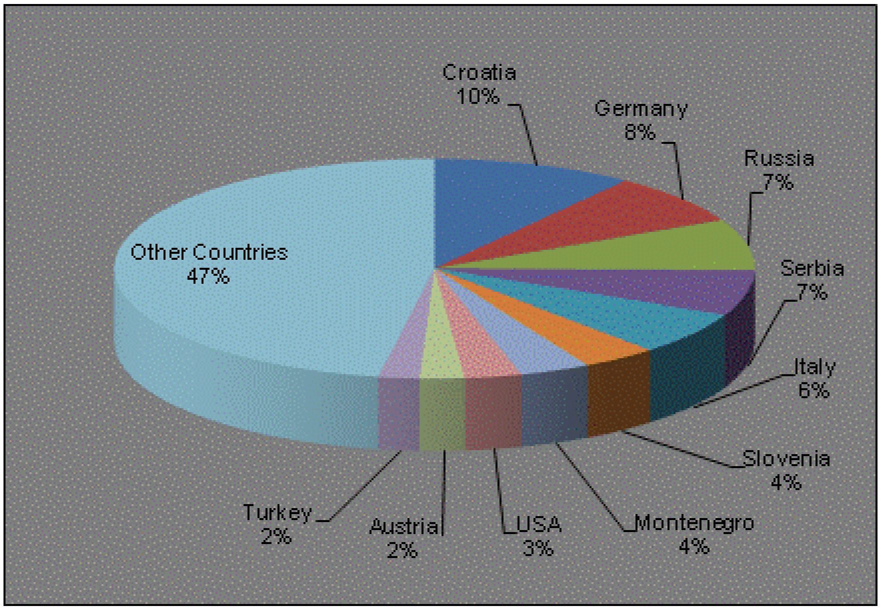
Market share of BiH's trading partners in 2011:

BiH TOTAL EXPORTS



BiH Agency for Statistics

BiH TOTAL IMPORTS



BiH Agency for Statistics

Croatian, Slovenian, German, Serbian, Austrian and Italian processed food products dominate the market. The most imported food products are beverages (alcoholic and non-alcoholic), grains, tobacco products, and dairy products. In 2011, total US agricultural, fish and forestry exports to BiH were valued at US$11.44 million (0.5% share of BiH's agriculture, fish and forestry imports from the world) and consisted of various food ingredients, processed fruits and fruit juices, dried nuts and fruits, whisky, and seafood. The United States was not a key destination for BiH products, with total imports of BiH agricultural, fish and forestry valued at US$2.2 million in 2011. The main items were coffee, pastry mixes, cookies and wafers, and mineral water. BiH is not a member of the World Trade Organization (WTO) but has started accession negotiation.

Size and Growth of Consumer Foods Market

Little official information is available about the size or growth of the market. An estimated size of the consumer food retail market is US$3.7 billion (KM 5.5 billion), but it is expected to decline in 2013 due to the ongoing economic crises. A significant development in the retail market has been appearance of large retailers, many of them foreign-owned. There has been significant concentration taking place in this sector, with bigger shopping centers supplanting smaller traditional shops. The top 10 retailers in 2011 held a 45% market share, which was an 8% increase over the previous year, and a 40% increase over the last 5 years (GfK BiH). Croatian retail chain Konzum and local chain Bingo recorded the largest growth in market share in 2011 (about 20%), and Slovenian Mercator recorded a 76% growth rate in the first half of 2012, because they invested in an expansion of their retail network. However, in first eleven months of 2012, the big retailers recorded a significant decline in sales due to the economic crises and the increasing number of unemployed people – BiH's purchasing power is only 17% of the European average. The decline in sales is expected to continue in 2013, because of BiH's unfavorable economic indicators.

Market Opportunities for Consumer Foods and 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 and safety control among locally produced and imported products is often erratic 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 the market that undercut other products;
- There are still active gray and black markets;
- Fraud and corruption can be a problem, especially in relation to taxation and import duties.

However, there are market opportunities for high quality U.S. products due to the fact that consumer awareness is improving which will eventually result in spending more money on high quality food products. Californian wines (lower price point), almonds and peanut butter are already in the market.

Food Expenditures and Consumption

It is estimated that an average Bosnian family that consist of 3.27 members spends around $4,940 annually (2011 est.) on food products (source: Entity Institutes for Statistics).

According to BiH Agency for Statistics based on the World Bank's methodology (minimum 2,100 calories per person on daily basis), the poverty rate for BiH in 2007 was 18.6%, with 22.9% at risk of poverty thus almost one fifth of total population cannot afford enough food.

Demographic Developments and Impact on Consumer Buying Habits

BiH has a population of around 4 million and an average BiH household is comprised of 3.27 members. One in ten households is run by a single parent. The population growth rate is -0.003% (2012 estimate).

The rural population decreased significantly as a 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 de-mining effort.

Advantages	Challenges

Insufficient domestic food production, imports nearly three times larger than exports	Long distance, bad transportation conditions, absence of highways, limited railway service
Increased urban population	Weak economy affects consumer purchasing power, low average net wage, high unemployment rate
High quality of U.S. products	Consumers more interested in price than in quality
Import duties low if compared to other counties in the region	Illegally imported and low-quality products compete with legitimately imported foods
Relatively low costs for introduction and promotion of new products using local broadcast and print media or in-store promotions	Different distribution systems in the two Entities, different taxation systems; difficulties in finding a reliable and capable local partner to carry out marketing and distribution
Increasing number of large retail supermarkets	Domestic market flooded with products imported from ex-Yugoslavia neighboring countries (Central European Free Trade Agreement) and EU countries (Interim Agreement lowers import duties for EU member-countries)
Fascination with American culture (language, music, TV shows, fashions) carries over to American food, such as famous "Coca Cola"	Reservations towards GM foods due to a lack of consumer education on the subject and a desire to meet EU requirements
Food imports grow year by year	Small businesses, limited access to finance and high interest rates negatively affect capacity of BiH's importers
Pork and poultry consumption increasing as a result of high beef prices	Pork consumption is relatively low because of BiH's large Muslim population

II. Exporters Business Tips

Local business customs

Importers/wholesalers/distributors provide transportation, product storage, market information, financing, and some insurance. Finding an agent and/or distributor is the most effective way to market consumer goods.

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The Foreign Agricultural Service Sarajevo Office can assist U.S. companies exporting to BiH by identifying local opportunities for the sale of U.S. products, providing counseling on the market, and can help you locate qualified distributors (please see the Key Contacts and Further Information).

The distribution systems are different for the F BiH and the RS because of differing legal frameworks. There have been efforts lately to harmonize rules between the two entities, but there are still significant differences. It is often necessary to develop multiple distribution channels and relations with distributors in both Entities in order to cover the whole country. Some foreign companies have established a representative office in order to control distribution channels, while some companies rely on strong local companies to control distribution channels. Local companies prefer to do business with people they know well. Business friendships are highly valued. Establishing a local presence and employing local people signal long-term commitment to the market, and are well received.

Wholesalers are the real channels for providing transportation, product storage, market information, financing, and risk management. Most wholesalers are independent full-service merchant wholesalers, importing and distributing goods. There is a significant degree of specialization in the wholesale sector by industry.

The most significant development in the retail market is the appearance of large retailers, many of them foreign-owned, such as Mercator from Slovenia, Interex from France, Konzum from Croatia, Maxi from Serbia and locally-owned Bingo, AMKO Komerc and Merkur. The introduction of the shopping mall concept has changed consumer habits and enabled larger retailers to shift the effort of financing onto manufacturers and distributors, especially in the consumer goods sector.

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 people usually buy non-perishable 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, specialized stores or green markets.

Consumption of red meats is traditionally high. However, in 2012, consumption increased for poultry meat and pork, while beef and lamb consumption dropped due to the economic crisis and declining purchasing power and high beef prices. We expect this trend to continue in 2013. Pork consumption is much higher in the RS than in the F BiH, because of F BiH's large Muslim population.
Although there continue to be periodic outbreaks of animal diseases such as brucellosis and classical swine fever, these outbreaks do not appear to have shaken consumer confidence. BSE and FMD have not been reported in BiH.

A typical Bosnian meal is comprised of either red or white meat, potatoes or 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 a few ethnic restaurants (e.g., Italian, Chinese and Mexican). Fish consumption is traditionally low (around 2.5 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.

BiH consumers, in general, are un-informed about genetically modified (GM) foods and therefore leery of them. . Some consumers report they would eat biotech foods after proper testing and labeling, but they need more information to decide whether they want to buy the product. More information could potentially change consumer attitudes towards biotechnology in a positive direction.

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 strong market segment made up of all of the foreigners in BiH (especially in Sarajevo and Banja Luka) that work for foreign humanitarian and military organizations.

General Import and Inspection Procedures

Foreign exporters can import food products into BiH using a locally registered office or a local company/shipping agency registered for import activities. It is common for agents to help with food import regulations.

Prior import approvals and licenses are required for live animals and non–heat treated animal products, and seeds and pesticides. For animals and non–heat treated animal products the State Veterinary Office (SVO) provides final approvals. For seeds, planting materials and pesticides the Entity agricultural ministries provide prior approvals. Forms are available at the SVO and the Agricultural Ministries (see Key Contacts and Further Information). It is important to note that requirements for prior import approvals might differ between the two Entities. All 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, phyto-sanitary certificates for fruits, vegetables, seeds etc.) and are subject to veterinary and phyto-sanitary inspections at border crossings and sanitary and market inspections at customs points.

A GMO free certificate or a GMO-related statement included in the health certificate is often required for grains and similar products. That's because BiH's recently adopted GMO Law and enforcing by-laws stipulate mandatory labeling of GMO content above a 0.9% threshold.

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

Market inspectors issue the quality certificates at inspection points (see Appendix I). Quality control inspections are done at the exporter/importer's written request, which should be received 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 basic quality data. If the same product is imported again, and has been tested within 90 days, only a visual check is done. Both Entities have officially recognized laboratories to test imported food products.

If a market inspector rejects an importer's request, goods are stored until the procedure is complete - the inspector can order the return or destruction of goods, if necessary, at the cost of importer, or can order certain changes prior to customs clearance.

For more detailed import standards and regulations please refer to 2012 FAIRS Report that can be downloaded at http://gain.fas.usda.gov/Pages/Default.aspx .

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 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. Lately, appearance of shopping centers (malls) has been significant and has introduced big changes in the retail market. There are yet not many foreign retail chains, except Slovenian Mercator, French Interex (discount house that attracts price-concerned consumers), Croatian Velpro (cash and carry) and Konzum, and Serbian Maxi Market. These foreign retailers are being challenged by local food retailers (Bingo, AMKO and Merkur) that are consolidating and becoming increasingly competitive.
Shopping centers import and distribute food and offer a great variety of 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 (entertainment for kids, clowns, and games/ lotteries). Quite often, they organize in-store promotions and product tastings and provide small gifts with purchased products. A special discount is offered to faithful customers. Food items are also sold in a number of small independent groceries and open markets.

Hotel, Restaurant and Institutional (HRI)

Total turnover in catering 2000 –2010

Year	Federation of BiH Total turnover (000 KM)	Republika Srpska Total turnover (000 KM)
2000	68,900	54,584
2001	60,784	48,312
2002	71,010	47,917
2003	76,270	53,046
2004	85,113	53,512
2005	86,754	49,814
2006	95,281	65,794
2007	118,786	77,341
2008	135,697	101,298
2009	131,784	103,335
2010	140,905	104,427

Source: Federation and Republika Srpska Institutes for Statistics
US$ 1.00 = KM 1.51 on November 29, 2012

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 and the number of meals.

Tourism, tourism promotion, and the hospitality and catering industry have been regulated at the Entity level. This has resulted in business-inhibiting differences in requirements for companies and individuals working in the sector, differences in the way funding for tourism promotion is collected and distributed, and differences in the way accommodation is classified.

Lately, there has been a growing consensus that tourism can be a major source of job growth and foreign exchange earnings for Bosnia and Herzegovina. According to foreign experts, BiH has a large potential in niche market tourism and tapping into the world tourism market could have huge benefits for the BiH economy.

Promotional and Marketing Strategies

Advertising that used to be the single marketing tool in BiH is now combined with direct marketing (door-to-door contacts, material distribution and special offers). The most popular advertising media are television, radio, newspapers and magazines. In addition, outdoor advertising is becoming more and more popular (billboards, bulletins, and displays in urban areas and on sides of the road). Recent data indicates that 68 percent of adverting is conducted through TV, followed by 20 percent through outdoor advertising, while radio and print media account for 6 percent each. Also, cable television is rapidly developing in urban areas of BiH. Radio is the most popular marketing tool at the local level. Direct mailing is also becoming popular advertising tool (leaflets placed under car windshield wipers, mailbox brochures, or advertising materials placed in newspapers). 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 a good way to market products and services in BiH and to find partners and distributors. The trade fair sector in BiH has been growing rapidly. 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. About one-third of the BiH population uses the Internet regularly, and food sales are still very small.

Product Category	**Market Size**	**2010 imports (in million KM)**	**Average Annual Import Growth (2005-2010)**	**Import Tariff Rate 2011**	**Key Constraints of Market Development**	**Market Attractiveness for USA**
Tobacco products	10 billion cigarettes	142.5	3.35 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	Traditionally strong presence of Croatian tobacco products	Demand and consumption should continue to grow
Chocolate	N/a	126.4	3.7 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	Competition from key European companies	Poor local production
Beverages and	N/a	125.1	4.1 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	Competition from	Insufficient local producti

Mineral Water					neighboring suppliers	on, approximately 30% imported
Biscuits and Cookies	N/a	106.5	8.5 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	No	Growing demand
Coffee	20,000 MT	69.7	6.5 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	No	Traditionally high consumption
Fish and Seafood	10,000 MT (est.)	47.8	1.2 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	Traditionally low consumption, lower quality fish is consumed the most	This market could become more dynamic if an import is followed by a good promotion
Cheese	40,000 MT	47.3	1.2 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	Competition from key European suppliers	Insufficient local production and growing demand
Sauces and Spices	N/a	36.2	0.4 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	No	Insufficient local production
Wine	20,000 hectoliters	30.3	5.4 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	Increasing local production of	Consumption of high quality

	(est.)				good quality wines, competition from European suppliers	wines is expected to grow with standard of living.
Ice-cream	2,500 MT (est.)	14.6	5.2 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	Competition from key suppliers such as Croatia	BiH has poor domestic production.
Tree Nuts	N/a	9.6	5.5 %	http://www.uino.gov.ba/download/Dokumenti/Dokumenti/bos/Carina/2008-b-CTBiH.pdf	Competition from key suppliers (Romania, Italy and Iran), lower quality nuts preferred	Insufficient local production

Currency note: US$1.00 = KM 1.48 on 12/24/2012

V. Key Contacts and Further Information

FAS/USDA
U.S. Embassy to BiH
71000 Sarajevo
Bosnia and Herzegovina
Tel.: +387 33 704 305
Fax: +387 33 704 425
Contact person: Sanela Stanojcic
E-mail: Sanela.Stanojcic@fas.usda.gov

State Veterinary Office
Radiceva 8/II
7100 Sarajevo
Contact person: Zeljko Kovac
Bosnia and Herzegovina
Tel. +387 33 565 700
Fax +387 33 565 725
E-mail: info@vet.gov.ba
http://www.vet.gov.ba/

BiH Plant Health Administration
Radiceva 8
71000 Sarajevo
Contact person: Miljana Knezevic
Tel/fax: +387 33 211 693 and 212 387
E-mail: upravabihzzb@bih.net.ba
http://www.uzzb.gov.ba/

F BiH Ministry of Agriculture, Water Management and Forestry
Marka Marulica 2
71 000 Sarajevo
Bosnia and Herzegovina
Tel. +387 33 726 653
Email: sraguz@net.hr
http://fmpvs.gov.ba/

RS Ministry of Agriculture, Forestry and Water Management
Trg Republike Srpske 1
78000 Banja Luka
Tel: +387 51 338 397 and 338 398
Fax: +387 51 338 866
http://www.vladars.net/lt/min/mps.html
E-mail: mps@mps.vladars.net

F BiH Inspectorate
Fehima ef. Curcica 6
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Fax + 387 33 563 351
info@fuzip.gov.bahttp://www.fuzip.gov.ba/

RS Inspectorate

Trg Republike Srpske 8
51000 Banja Luka
Tel. + 387 51 337 627
Fax: +387 51 307 955
Email: uprava@inspektorat.vladars.net
http://www.inspektorat.vladars.net/

Indirect Tax Administration
Ulica Bana Lazarevića bb,
78 000 Banja Luka
Tel: +387 51 335 494
Fax: +387 51 335 101
http://www.uino.gov.ba/

American Chamber of Commerce in Bosnia and Herzegovina
Zmaja od Bosne 4
71000 Sarajevo
Tel: 387-33-269-230
Fax: 387-33-269-232
Email: amcham@amcham.ba
http://www.amcham.ba/

BiH Foreign Trade Chamber
Branislava Djurdjeva 10
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Tel. +387 33 566 222
Fax: +387 33 214 292
E-mail: cis@komorabih.ba
http://www.komorabih.ba/

F BiH Chamber of Economy
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71 000 Sarajevo
Tel. +387 33 663 370 and 667 940
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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 51 215 987
Fax: +387 51 215 565
E-Mail: pkrs@blic.net; info@komorars.ba
http://www.komorabl.inecco.net/

FIPA - Foreign Investment Promotion Agency
Phone: 387-33-278-080
Fax: 387-33-278-081
Email: fipa@fipa.gov.ba
Branilaca Sarajeva 21/lll
71000 Sarajevo
Bosnia and Herzegovina
www.fipa.gov.ba

BiH Institute for Accreditation
Hamdije Cemerlica 2/7
71000 Sarajevo
Phone: 387-33-715-560
Fax: 387-33-715-561
http://www.bata.gov.ba/bafiles/index_ba.htm

BIH Intellectual Property Rights Institute
Kralja Petra Krešimira IV/8a.
88000 Mostar
Tel. +387 36 334 381
http://www.ipr.gov.ba/en

VI. Other Relevant Reports

2012 Export Certificate FAIRS Report that can be downloaded at http://gain.fas.usda.gov/Pages/Default.aspx .

APPENDIX I. STATISTICS

TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) [1/]	2010	757/0.2
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%)[1/]	2010	901/1
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%)[1/]	2010	11.5/1
Total Population (Millions) / Annual Growth Rate (%)	2011	3,8/ -0.003
Urban Population (Millions) / Annual Growth Rate (%)	2006	1.7/0.3
Number of Major Metropolitan Areas [2/]	2011	0
Size of the Middle Class (Millions) / Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)	2011	4,228
Unemployment Rate (%)	2011	27%

Per Capita Food Expenditures (U.S. Dollars) [3/]	20010	1,510
Percent of Female Population Employed	2007	37.8%
Exchange Rate	11/24/12	US$1.51 = 1.48 KM
Footnotes:		
[1/] Data from BiH Agency for Statistics		
[2/] There are no metropolitan areas with population in excess of 1,000,000		
[3/] The figure represents food expenditures for a basket composed of necessary food products		