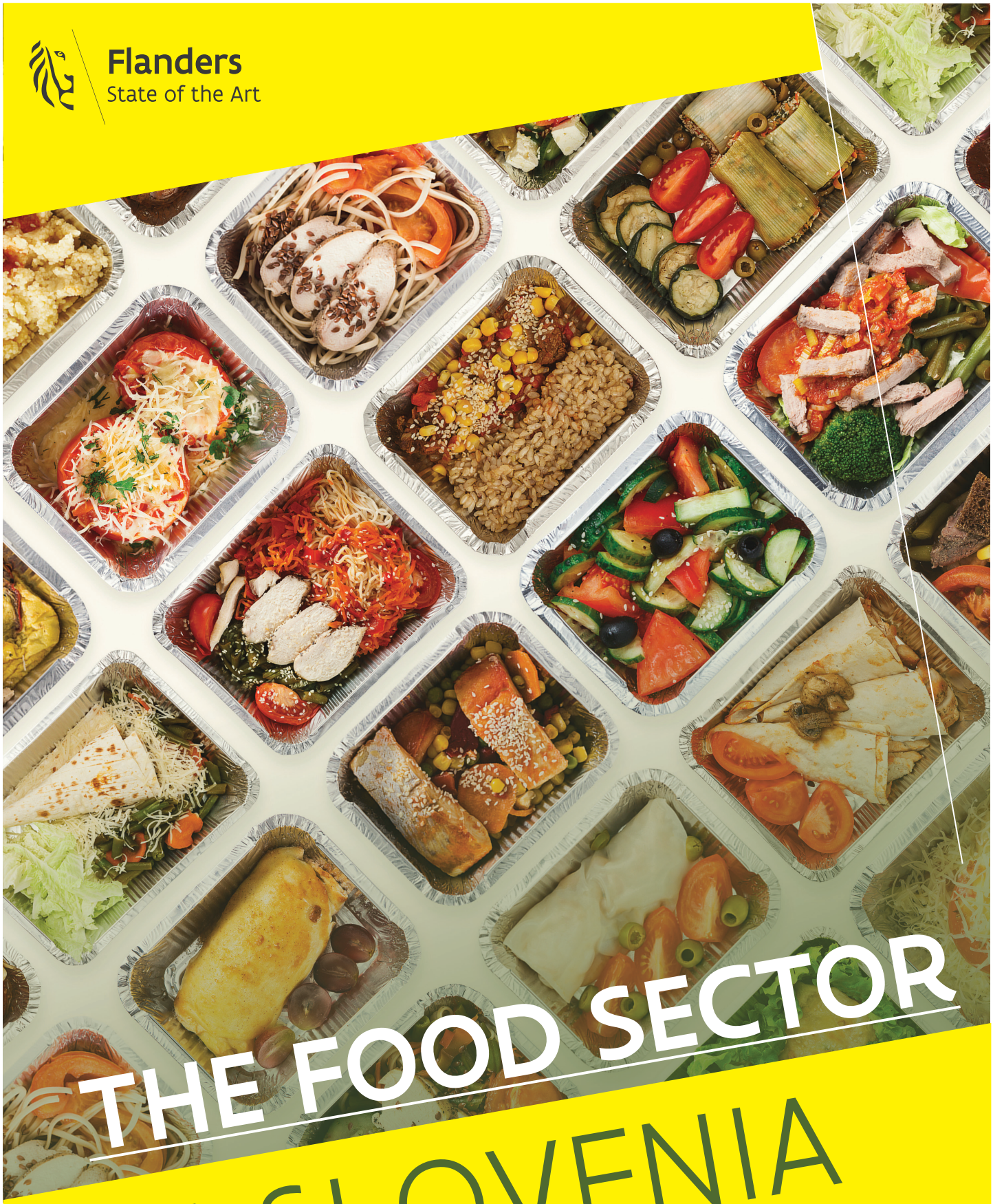
Flanders
State of the Art



THE FOOD SECTOR IN SLOVENIA

FLANDERS INVESTMENT & TRADE MARKET SURVEY

FLANDERS
INVESTMENT &
TRADE

Market study

THE FOOD SECTOR IN SLOVENIA

FOOD PRODUCTION & PROCESSING
FOOD NICHE MARKETS
DISTRIBUTION CHANNELS

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1. GENERAL INFORMATION ON SLOVENIA'S ECONOMY

Slovenia was part of the Central-European countries joining the European Union in May 2004 and was the first CE country to join the Euro-zone on 1 January 2007. This joining of the Euro-zone, which went on quite smoothly, highlights that the country's economy was and still is the most advanced in Central Europe. Slovenia is often cited as the ideal transition economy. The accession agreement with the OECD in June 2010 improved Slovenia's international competitiveness.

1.1 ECONOMIC GROWTH

According to the Statistical Office of Slovenia GDP for 2019 was estimated at EUR 48,393 million (23.265 EUR per capita). This was a 5.5% nominal increase over 2018. In volume terms the 2019 GDP grew by 3.2%.

3.2% growth of GDP in 2019 was due to increased value added in most production activities. The largest contributions were from manufacturing (1.5 percentage points), construction (0.4 p.p.), and information and communication (0.4 p.p).

1.2 INFLATION AND CONSUMER PRICE INDEX (CPI)

In October 2020, deflation was recorded at the annual level (–0.1%), while at the monthly level prices on average increased by 0.3%. In one year goods prices went down by 0.8%, while service prices went up by 1.2%.

In October 2020, the annual growth of consumer prices was –0.1% (in October 2019 it was 1.4%). The 12-month average price growth was 0.4% (in the same period last year 1.6%).

1.3 UNEMPLOYMENT AND LABOUR MARKET

In the 2nd quarter 2020, the unemployment rate was 5.2%. Compared to the same period last year, it increased by 1 percentage point. It was 4.5% among men and 5.9% among women. The unemployment rate was the highest (16%) among young people in the 15–24 age group. Compared to the 2nd quarter of 2019, the unemployment rate among young people increased by 9.5 percentage points.

1.4 FOREIGN TRADE, GROSS DEBT AND BUDGET DEFICIT

Slovenia is a small country and highly open to foreign trade. In 2018 exports accounted for 76.5% of the country's GDP. More than three-quarters of trade was with EU member states: 77% of all exports and 78.3% of all imports.

Slovenia's exports in the first nine months of 2020 amounted to EUR 24,200.7 million and imports to EUR 22,919.1 million. Exports in the observed period decreased by 3.8% and imports by 9.1% compared with the same period of 2019.

An external trade surplus was generated in the first nine months of 2020 and amounted to EUR 1,281.6 million, while the export/import ratio was 105.6%.

1.5 PROSPECTS FOR SLOVENIA'S ECONOMY

The forecasts of the Slovenian Institute of Macroeconomic Analysis and Development (IMAD) are affected by the outbreak of the COVID-19 epidemic. Because of the uncertainty of the epidemiological picture two alternative scenarios have been prepared. GDP growth will primarily depend on the effectiveness of the domestic and foreign corona measures. One projection foresees a contraction of 6.5% in economic activity this year, followed by a stabilization over the next two years with economic growth of 4.9% and 3.6% respectively. In the worst-case scenario the losses in economic activity would be more substantial and longer lasting. GDP would decline by approximately 10% this year, followed by a very gradual recovery in the following years.

2. GENERAL INTRODUCTION TO SLOVENIA'S FOOD SECTOR

First, we will have a macro-view on Slovenia's food sector. In a first step, we will have a closer look at Slovenia's food production, thereby quickly analyzing the main categories (such as cereals, fruits, dairy products, meat etc) to get an insight on whether Slovenia can sustain its own internal food demand. If not, there are supply opportunities, i.e. export from Flanders to Slovenia. In a second step, we will have a look at Slovenia's food processing industry, so as to check, again, whether some of the food processing capacities are missing, i.e. whether there are opportunities for export. In the second half of this study, we give a survey of all food niche segments where foreign food suppliers may play or are already playing a role. This second part is concluded by an overview of Slovenia's food retail market. At the end of this sector study, you will find an overview of Slovenia's main food industry associations and of its main fairs as well as some other useful links.

3. SLOVENIA'S FOOD PRODUCTION

3.1 AGRICULTURAL LAND (SURVEY)

Slovenia's total surface is 2,027 million ha or ca 20,000 square km (this is ca 2/3 of Belgium). According to the Slovenian Forest Service 58,2% of this total surface was covered by forests in 2017, with Slovenia

ranking fourth in Europe (after Sweden, Finland and Estonia) in terms of the proportion of forests in total surface. Less than 30% of the total surface is classified as 'agricultural land', of which half is located in highlands or mountains, resulting in unfavorable conditions for production. That's also the reason that Slovenia's food self-sufficiency rate has been on a steady decline (however, completely self-sufficient in wine production). The unfavorable conditions do not prevent agricultural production but make it less competitive (resulting in higher output prices) and less adaptive (so that it takes much more effort to amend to new trends in food consumption).

3.2 AGRICULTURAL PRODUCTION

According to the Farm Structure Survey data, there were 69,902 agricultural holdings on 1 June 2016. 231 were agricultural enterprises and the rest were family farms (69,671). The average size of 6,5 hectares per farm indicates the small scale structure of the sector.

Slovenia's value of agricultural production was EUR 1,325 million in 2019, which was 1,2% of GDP. Crop production was estimated at EUR 735 million, which was 55% of the agricultural output value, while animal output was estimated at EUR 571 million (i.e. 43%).

3.3 PRODUCTION OF CEREALS & MEAT: SELF-SUFFICIENCY?

According to data from the Statistical Office, the rate of self-reliance in 2019 was 74.1% for cereals and 80,9% for meat.

Tabel 1: Calendar crop and animal supply balance sheets, Slovenia, 2019

	Production 1.000 t	Domestic use 1.000 t	Self-sufficiency rate (%)	Consumption per capita (kg)
Cereals	641,7	865,8	74,1	118,2
Meat	153,6	189,8	80,9	90,8

Source: Statistical Office of Slovenia, The Agricultural Institute of Slovenia

Domestic production of cereals was more than 640,000 tonnes in 2019, 8% more than in the previous year. Domestic consumption also slightly increased and reached around 865,000 tonnes. Due to the more extensive production and consumption, the level of self-sufficiency in cereals increased in 2019 compared to the previous year, but was still relatively low (74%).

Livestock breeding is the most important industry of Slovenian agriculture, especially cattle meat production which amounted to 43,100 tonnes in 2019. Between 2000 and 2018 the self-sufficiency in fresh meat never amounted to 100%. It is the highest for horse meat, beef and poultry meat (which

are being exported) and the lowest for pork (in 2018 only 38% of pork consumed in Slovenia was produced in Slovenia).

PRODUCTION OF MEAT: A DETAILED LOOK AT LIVESTOCK

Tabel 2: Livestock, Slovenia

	2018 number	2019 number	2019 2018 index
Cattle	476,806	482,963	101,3
Pigs	259,125	240,137	92,7
Poultry	6,695,925	6,681,274	99,8
Sheep	109,832	110,260	100,4
Goats	24,710	24,885	100,7

Source: Statistical Office of Slovenia

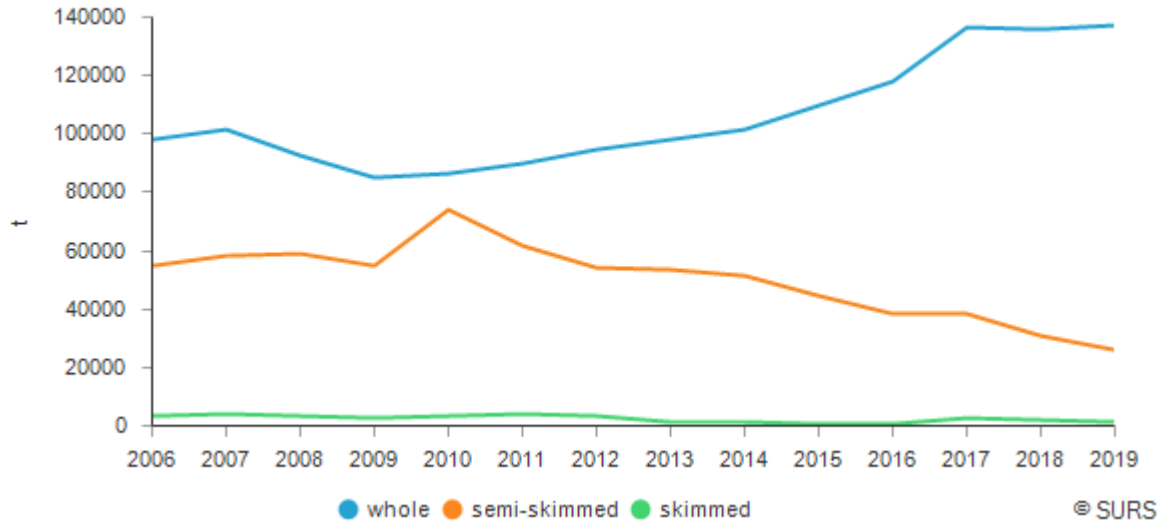
As data show, the number of pigs went down again and the drop in the number of pigs in Slovenia continues. In 2019 the number of pigs in Slovenia was the lowest since 1991.

3.4 PRODUCTION OF MILK AND CHEESE

On about 12,100 agricultural holdings nearly 623,000 tons of cow's milk was produced in 2019, i.e. almost 0.9% less than in 2018 and more than 5% less than in 2017. In 2019 about 5,500 agricultural holdings were producing milk for either sale by contract or direct sale. On the remaining 6,600 agricultural holdings milk was mostly used as feed or for food (self-supply).

Almost 291,000 tons of milk were exported from Slovenia in 2019 (more than 5% less than in 2018), of that almost 221,000 tons of whole milk in bulk. Around 36,000 tons of milk were imported (more than 18% less than in the previous year).

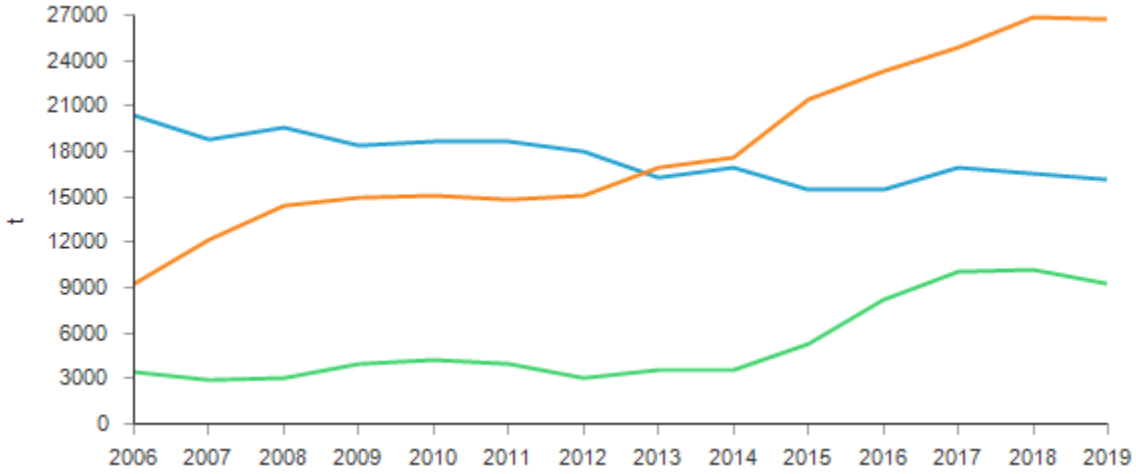
Graph 1: Drinking milk production, Slovenia



Sources: SURS, CCIS – CAFE Chamber of Commerce and Industry of Slovenia – Chamber of Agricultural and Food Enterprises

In 2019 the total quantity of produced cheese decreased by more than 400 tons (or almost 3%) to around 16,100 tons. Cheese import surpassed cheese production by Slovene dairies by more than 10,600 tons and decreased slightly compared to 2018. This was the first decrease after 2011. Also the export of cheese decreased: almost 9,300 tons of cheese were exported (almost 10% decrease compared to 2018).

Graph 2: Production, import and export of cheese, Slovenia



Sources: SURS, CCIS – CAFE Chamber of Commerce and Industry of Slovenia – Chamber of Agricultural and Food Enterprises

4. FOOD PROCESSING INDUSTRY

The Slovenian food processing industry is quite extensive and has a relatively long tradition. Most produced and processed food is sold on the domestic market, therefore a positive image of the whole supply chain is important. The new 'Selected Quality - Slovenia' trade mark tells the consumer that the entire production takes place in Slovenia.

Companies that manufacture bread, fresh pastry goods and cakes represent 44% of all Slovenian food processing enterprises; they are followed by producers of meat and meat products.

The purpose of this chapter is not to be exhaustive but rather to focus on the main Slovenian food processors in some important (niche) segments.

4.1 BEER INDUSTRY

Although Slovenia is admittedly more a wine growing and drinking nation, there is nearly 200 hundred years of brewing tradition, with Pivovarna Laško Union (http://www.lasko.eu/en/-) as the largest beer manufacturer. Before, there were two separate breweries: Pivovarna Laško and Pivovarna Union (located in Ljubljana). In 2002 Pivovarna Laško took over Pivovarna Union. Since 2016 the company is 100% owned by Heineken with the local brands 'Laško' and 'Union' retained.

The number of small private breweries is on the rise – there were 61 registered in 2018, which is quite an increase compared to 2010 when there were only 13. Still, their market share remains insignificant (1-2%).

A trend that is important to emphasize is the expected increase in the popularity of craft beer and also the increased share of dark beer in total beer sales.

Unlike in Belgium/Flanders, the Slovenian beer industry does not produce specialty or stronger (higher fermentation) beers and, as a result, there are opportunities for Flemish specialty beers, many of which are already imported and well known in the Slovenian market. As a matter of fact, the supply of Belgian specialty beers has been steadily increasing during the past recent years, especially in the capital Ljubljana, which is also a university city. Most of the Belgian specialty beers on offer in pubs seem, moreover, to be imported in Slovenia via parallel import, often via Italian wholesalers. So, there are opportunities for Flemish breweries to sell their specialty beers in Slovenia directly via a Slovenian importer/distributor.

4.2 BAKERY, PASTA

The Žito group (https://zito.si/en/) - dominates Slovenian bakery: they produce more than 30,000 tonnes of bread and bakery products yearly. They are also involved in the project 'Food 4 future' –

(http://www.food4future.net/en/) that aims to develop sustainable production of quality food and to impact the creation of innovative short supply chains.

Another important player on the bakery products market is Pekarna Grosuplje (https://pekarna-grosuplje.si/), since 2015 part of the Dondon Group.

Mlinotest (https://www.mlinotest.si/en) is the largest and most recognized pasta producer in the region. Besides grain mill products, bread and pastry and confectionery, they started the production of gluten-free products as well.

4.3 CHOCOLATES AND CONFECTIONERY

Confectionery is produced in Slovenia mainly by the Žito group, with their well-known brand Gorenjka (chocolate and pastries): https://gorenjka.si/en/. Apart from Žito, there are still smaller Slovenian manufacturers of chocolate and confectionery products. In Ljubljana Rustika (www.rustika.si) and Benedict are well known. Benedict produces its own chocolate and chocolate products under the tradename of Cukrcek (www.cukrcek.si), but also distributes imported chocolates & confectionery. Other chocolate producers outside Ljubljana are Dobnik (www.cokoladniatelje.si), Čokoladnica Olimje (http://cokoladnica-olimje.si/) and Rajska Ptica (https://cokoladnica.si).

4.4 DAIRY

The company Ljubljanske Mlekarne (https://www.l-m.si/en) is the largest dairy producer in Slovenia, which operates as part of the Lactalis Group. They produce a broad range of dairy products and have a couple of dominating brands. Alpsko mleko milk became a cult Slovenian brand. Of all the dairies in Slovenia, Ljubljanske Mlekarne purchases the largest volume of domestic milk from over 2,000 Slovenian farms. Using a tracking system, they can accurately identify the farm where the milk was produced for each milk tank.

Two other important dairies are Pomurske Mlekarne (https://www.pomurske-mlekarne.si/en/) in the Northeast of Slovenia and Mlekarna Celeia (https://www.mlekarnaceleia.si/) near Celje (central Slovenia). In recent years Mlekarna Krepko (https://www.mlekarna-krepko.si/en), which is famous for its buttermilk (kefir) and Mlekarna Planika (https://www.mlekarna-planika.si/en/), whose products are bearing the label 'Selected Quality', have been successfully improving their market position.

4.5 ATLANTIC DROGA KOLINSKA

The company Atlantic Droga Kolinska, since 2010 part of the Croatian Atlantic Grupa (https://www.atlanticgrupa.com/en/about-us/), is the largest food processor in Slovenia and has a dominant position in the segments of coffee and soft drinks, where it has two very valuable brands Barcaffe (https://www.barcaffe.si/), the number one brand coffee in Slovenia and Cockta

(https://cockta.eu). It also manufactures other food products like snacks, spreads (well known Argeta, https://www.argeta.com/en) and baby food.

4.6 MEAT PROCESSORS

Slovenia has two important meat processors, which typically dominate in their region. Kras d.o.o. (www.kras.si), renowned for its dry-cured ham – prosciutto, based in the Kras-region (Southwest of Slovenia) and Panvita (https://www.panvita.si/en/), based in Gornja Radgona (Northeast of Slovenia) Both Kras and Panvita are established brand names in Slovenia and have a solid market position.

4.7 POULTRY MEAT PROCESSORS

Perutnina Ptuj (https://www.perutnina.si/en/home/ is the leading specialized meat processing corporation, not only in Slovenia, but in the whole Southeast Europe region with companies in Croatia, Serbia, North Macedonia, Bosnia and Herzegovina, Austria and Romania.

Pivka Perutninarstvo d.d. (https://www.pivkap.si/en/) is smaller and also a much more national player, even though it has subsidiaries in Belgrade (Serbia) and Zagreb (Croatia).

4.8 SOFT DRINKS AND WATER

Slovenia has quite some tradition in the production of soft drinks. Without any doubt, the most valuable brand is Cockta, a local variant of Coca-cola with a long history going back well into the Yugoslavia-era (https://cockta.eu/).

The brand Cockta was bought in 2000 by Atlanta Droga Kolinska group (see above).

Another well known Slovenian brand for soft drinks is Fructal (http://www.fructal.si/en/). Fructal, which focuses on fruit juices, was in 2011 acquired by the Serbian group Nectar (https://www.nectar.rs/en/).

Radenska Adriatic (https://www.radenska.si/en/) is the largest Slovenian producer of mineral water and plans to become one of the three leading manufacturers of soft drinks in the Adriatic region by 2022. The company is also manufacturing and distributing Pepsi, Mirinda, and 7UP soft drinks on the Croatian market. In 2015 the Czech company Kofola became the largest shareholder of Radenska d.d.

4.9 WINE PRODUCERS: 3 MAIN REGIONS PODRAVJE, POSAVJE AND PRIMORSKA

Having a long history of producing wines, Slovenia has 3 main wine growing areas. Podravje region in the North is the largest wine growing area. The region is famous for its sparkling wines from Radgona (https://radgonske-gorice.si/) as well as for its white wines coming from areas around

Maribor (Slovenia's second largest city hosts the world's oldest vine), Ptuj (the oldest wine cellar in Slovenia- www.pullus.si) and Ormož (https://puklavecfamilywines.com/). The Posavje region is the only region that produces more red wine than white one (be it by a small margin) and focuses on bulk-production. Primorska in the South of Slovenia consists of 3 sub-regions such as Kras, Vipava and, last but not least, the Goriška brda region (close to Italy) that is internationally renowned for its quality wines (red and white). One of the most internationally renowned cellars is Movia: http://www.movia.si/en.

5. NICHE MARKETS AND OPPORTUNITIES

This chapter tries to describe some recent trends in the Slovenian food market as well as to indicate whether these trends in some sub-segments equal export opportunities for Flemish SMEs. One general truth to keep in mind is that, as far as food and drinks are concerned, Slovenians quite obviously prefer to 'buy local'. There are likely two main explanations for this: a) Slovenia is a very small market (2 million inhabitants) which is easier prone to protectionism; b) Slovenia, as one of the most advanced economies, has a respectful tradition in food manufacturing in the industrial and artisanal way and, hence, a quite decent supply basis. As a result, it does not make much sense to come with products which are also manufactured locally (people will buy the local products even if they are sometimes more expensive) or, put in another way, most of the export opportunities lie in the food niche segments where the Slovenian supply is on the weak side or simply inexistent such as: specialty beers, chocolates & confectionery, food ingredients and nutrition supplements, bio-food, to name a few, or equipment & machines needed in the food processing industry;

5.1 BREAD AND BAKERY PRODUCTS

According to the data by the National Statistical Office an average Slovenian annually consumes more than 50 kilograms of bakery products; bread has always been an important part of the Slovenian identity.

Please contact our Ljubljana office via ljubljana@fitagency.com for in depth information and/or contact details.

5.2 MILK AND DAIRY PRODUCTS

This is again a niche market where the Slovenians prefer to 'buy Slovenian', even though low efficiency in the Slovenian dairy industry results in average output prices which are noticeably higher than in the EU (e.g. milk costs almost double than in Belgium or the Netherlands). The same goes for other dairy products, as the Slovenian dairies have very often their own cheaper variants of famous cheeses (like brie, camembert, gorgonzola, etc). As a result, opportunities seem limited but then, again, the

diaries can be an interesting target for producers of specialized machines or equipment needed in the dairy production.

Please contact our Ljubljana office via ljubljana@fitagency.com for in depth information and/or contact details.

5.3 MEAT AND MEAT PRODUCTS

As noted earlier, Slovenia is relatively well self-sufficient as to the production of meat, with the exception of pigs. The reason for this is double: Slovenians eat relatively a lot of pig meat and some of the pigs that are raised are exported. In Slovenia, the 2 main (industrial) meat processors are Kras and Panvita Mir. Also, it has to be said that Slovenia has a tradition of excellent meat processing, with hams, salami, prosciutto etc that can compete with Europe's best products. In many agricultural areas there still is a wide-spread tradition of home-made meat products which are often used as means to attract tourists (agro-tourism). Be it as it may, in this segment of meat products, there are definitely opportunities for Flemish SMEs.

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5.4 BIO-FOOD

Of all Central-European countries that joined the EU in the first and second wave, Slovenia is the country with the highest purchasing power. On top of that, it must be said that the eco-awareness amongst Slovenians is quite high. Hence, it is no surprise that there has been a clear trend to (often more expensive) bio- & eco-food products, like in the rest of Europe.

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5.5 FOOD INGREDIENTS & NUTRITION SUPPLEMENTS

Another trend has been the increasing use of food ingredients and nutrition supplements, which are used e.g. in food or drinks for sportsmen. Again, this is to be put into the perspective of Slovenia's relatively high purchasing power as well as of the sportive nature of Slovenians.

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5.6 FROZEN FOOD

Another trend in Slovenia's food market is the continuously growing popularity of deep frozen food products. Frozen food exists in all food categories. In the category of pastries, Žito group (with the Hokus brand: https://zamrznjeno.zito.si/en/) and Pekarna Pecjak (www.pekarna-pecjak.si) are important players.

Perutnina Ptuj (http://www.perutnina.com/en) offers a range of frozen poultry products.

Please contact our Ljubljana office via ljubljana@fitagency.com for in depth information and/or contact details.

5.7 CHOCOLATE AND CONFECTIONERY PRODUCTS

Needless to say that Belgian and Flemish chocolate and confectionery products enjoy a very strong reputation also in Slovenia. The main Belgian/Flemish brands are being distributed on the Slovenian market already since many years and can be bought in all main retailers. Thanks to the strong brand image and reputation, they can withstand without problem the predominance of the local brand Gorenjka (Žito group).

Please contact our Ljubljana office via ljubljana@fitagency.com for in depth information and/or contact details.

5.8 SPECIALTY BEERS

Slovenia is admittedly a small market (2 million inhabitants) but its relatively high purchasing power per capita makes it an interesting market for specialty beers, which are usually (quite a bit) more expensive. As a result, quite a lot of Flemish specialty beers (like Duvel, Grimbergen, Leffe, Delirium, etc.) are already on the Slovenian market, where they can be bought at the larger retailers (Leclerc and Mercator e.g.) or even consumed in pubs in the larger cities. Some breweries have their own (exclusive) distributor on the market.

Please contact our Ljubljana office via ljubljana@fitagency.com for in depth information and/or contact details.

5.9 NON-ALCOHOLIC AND SOFT DRINKS

Slovenia's non-alcoholic drinks sector is quite well developed with some important local brands (e.g. Cockta) and several producers of fruit juices (Dana, Fructal, Presad) or of water (Dana, Radenska). As a result, this niche segment seems more difficult to enter.

Please contact our Ljubljana office via ljubljana@fitagency.com for in depth information and/or contact details.

6. FOOD RETAIL MARKET

The Slovenian food retail market continued to grow in 2019, especially modern grocery retailers experienced substantial growth, while traditional and independent grocers were in decline, particularly in urban areas of the largest cities.

The Slovenian food retail market is shaped by a mixture of domestic and West-European retailers.

6.1 MERCATOR

The Slovenian group Mercator is the biggest player on the food retail market. It used to have a market share of around 45% but that has been reduced by the entrance of discounters. As a result, Mercator's share of the retail market shrinked to 30% in 2019. Mercator's outlets range from the smaller neighbourhood outlets (often leased) to super- & hypermarkets. Importantly, Mercator also expanded in former Yugoslavian countries (Bosnia-Herzegovina, Croatia and Serbia).

6.2 TUŠ AND SPAR

Spar Slovenija is a subsidiary of the Austria-based ASPIAG (Austria SPAR International AG, which has subsidiaries in CEE). Both are interesting targets to approach, even though some decisions at Spar are not taken locally but either in Austria or in the Netherlands. The market share of Spar is estimated to be around 23%.

Tuš has been the third biggest retailer in Slovenia for years. However, in 2019 it was replaced by Hofer which gained an 11% market share.

6.3 DISCOUNT RETAILERS

From the above-mentioned market shares, it appears that Mercator, Spar and TUŠ have together about 65% share of the Slovenian retail market. The remaining 35% is shared amongst discount retailers such as Hofer (= Aldi) and Lidl (both German) and the French Leclerc (which has hypermarkets in Ljubljana and Maribor).

According to the National food ombudsman, there is more local produce on the shelves of Mercator, Spara and Tuš than in discount shops. But they're also improving: Hofer, for example, already has 52 percent of products from Slovenian manufacturers on its shelves. In a way, that is to please customers. Discount traders are struggling to keep on the shelves both products from local manufacturers and products containing local raw material.

6.4 OPPORTUNITIES FOR FLEMISH SME'S

Amongst these retailers, the two most interesting are the two Slovenian retailers TUŠ and Mercator, even though they are not easy to be approached. Both have centralized purchasing departments where product group managers are responsible for the purchase of specific food product categories. Generally, these two Slovenian retailers prefer to buy Slovenian food products, as these are often preferred by their customers. So, the challenge is to approach them with specific as well as quality products.

Here follows contact details per segment of the 3 main retails chains (Mercator, TUŠ and Spar) as well as of the 3 discounters Leclerc, Hofer (Aldi-group) and Lidl. However, it should be noted that there is often a high turnover of personnel with these retailers or discounters.

Hence, it is always advisable to contact FIT Ljubljana via ljubljana@fitagency.com, which will be happy to assist you in setting up a business meeting with one of the purchase managers of these retailers and/or discounters in Slovenia.

7. ASSOCIATIONS, FAIRS AND USEFUL LINKS

7.1 ASSOCIATIONS

The Slovenian Chamber of Commerce has a so-called branch organization, i.e. the **Chamber of Agriculture and Food Enterprises (CAFE)** which represents the interest of around 200 agricultural and food companies, registered in Slovenia.

Address: Dimičeva 13, 1000 Ljubljana
T: +386 1 5898 227
E-mail: zivilska.ind@gzs.si
Contact: Mrs Tanja Zagorc
Website: https://www.gzs.si/zbornica_kmetijskih_in_zivilskih_podjetij/vsebina/About-us

The CAFE is also the EIT Food (https://www.eitfood.eu/) hub in Slovenia
Contact person: Mrs Petra Medved
E-mail: petra.medved@gzs.si

7.2 TRADE FAIRS

In Slovenia, there are two yearly food trade fairs. The biggest trade fair is **AGRA**, organized by Pomurski sejem, in Gornja Radgona usually end of August/beginning of September. The fair is dedicated to agriculture and food products & processing.

In the beginning of the year, usually end of January, a smaller **Fair of Tastes**, known formerly as GASTexpo, is held in Ljubljana Exhibition Centre. Fair of Tastes is dedicated to HoReCa (including catering), bakery & confectionery, ice cream and gastronomy, in general.

AGRA fair: https://www.sejem-agra.si/en/
Note: every two years part of AGRA is dedicated to the food packaging industry (that part of the fair is called INPAK).

Fair of Tastes: https://www.gast.si/en/home-2/

7.3 USEFUL LINKS

- **Ministry of Agriculture, Forestry and Food:**

https://www.gov.si/en/state-authorities/ministries/ministry-of-agriculture-forestry-and-food/

- **Statistical Office RS, statistical data on agriculture and fishing:**

https://www.stat.si/StatWeb/en/Field/Index/11

- **Food safety, Veterinary and Phytosanitary Inspection:**

https://www.gov.si/en/state-authorities/bodies-within-ministries/administration-for-food-safety-veterinary-sector-and-plant-protection/o-upravi/inspekcija-za/

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