



**hrvatski izvoznici**  
croatian exporters

**14**

**konvencija hrvatskih izvoznika**

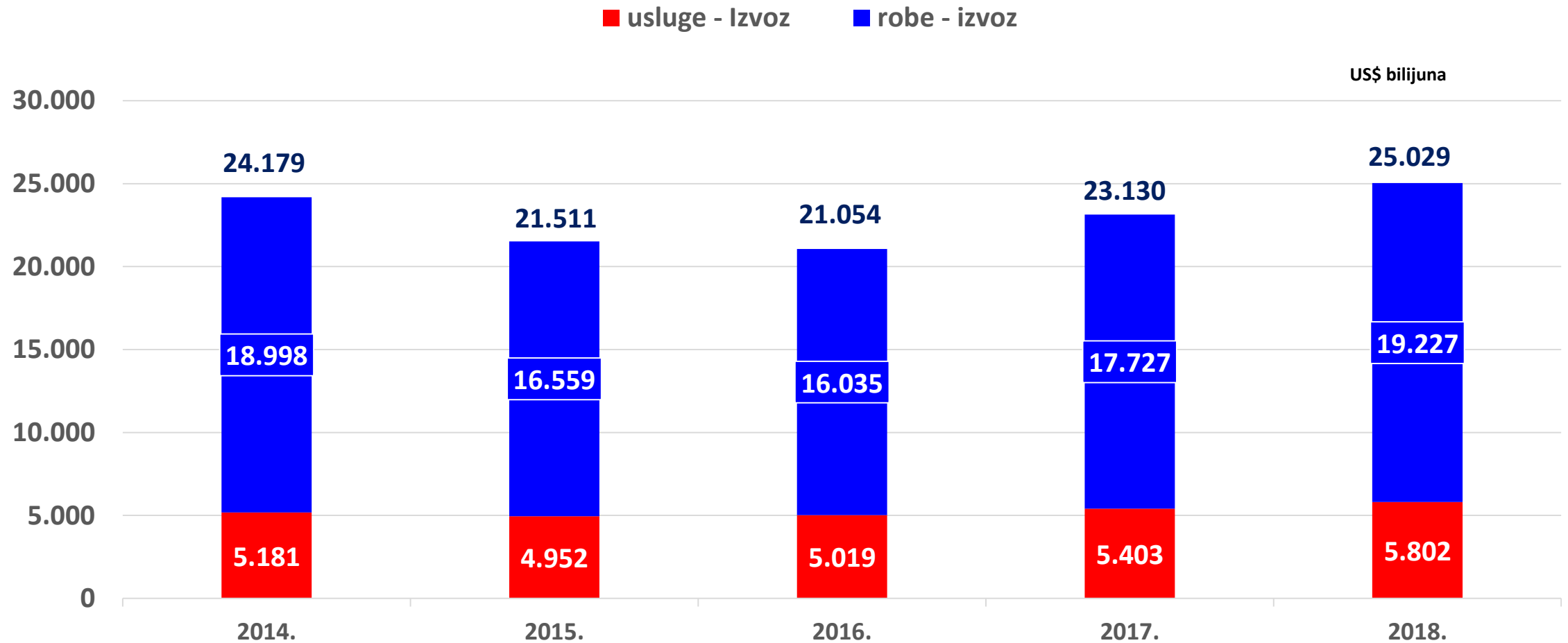
pod visokim pokroviteljstvom Vlade Republike Hrvatske

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**ULOGA IZVOZA U MODERNOJ  
GOSPODARSKOJ POLITICI**

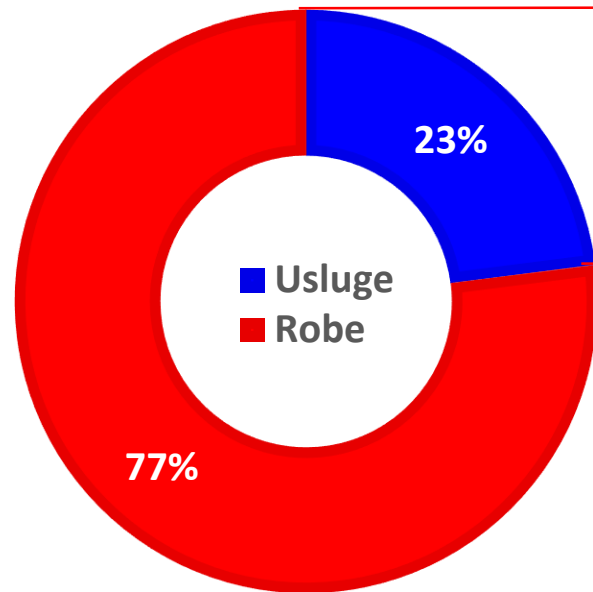
**Darinko Bago**  
predsjednik Hrvatskih izvoznika

# Svjetski bruto izvoz od 2014 – 2018. godine

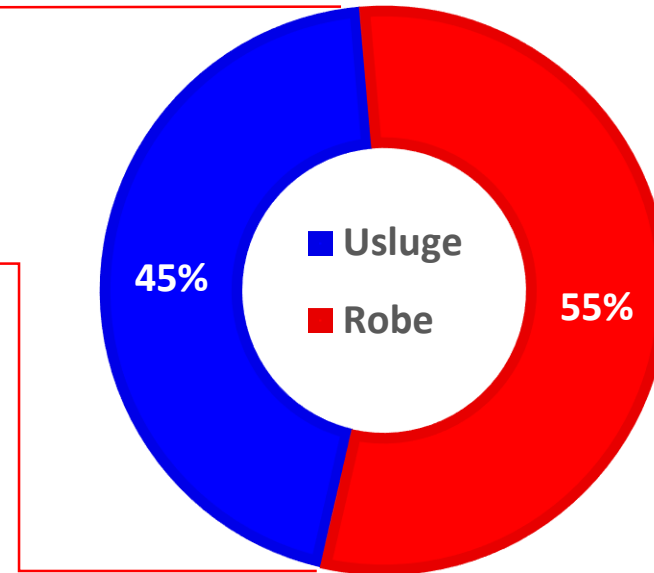


# Izvoz usluga kao udio u svjetskom bruto izvozu i dodanoj vrijednosti, 2018

Izvoz usluga kao udio bruto svjetskog izvoza

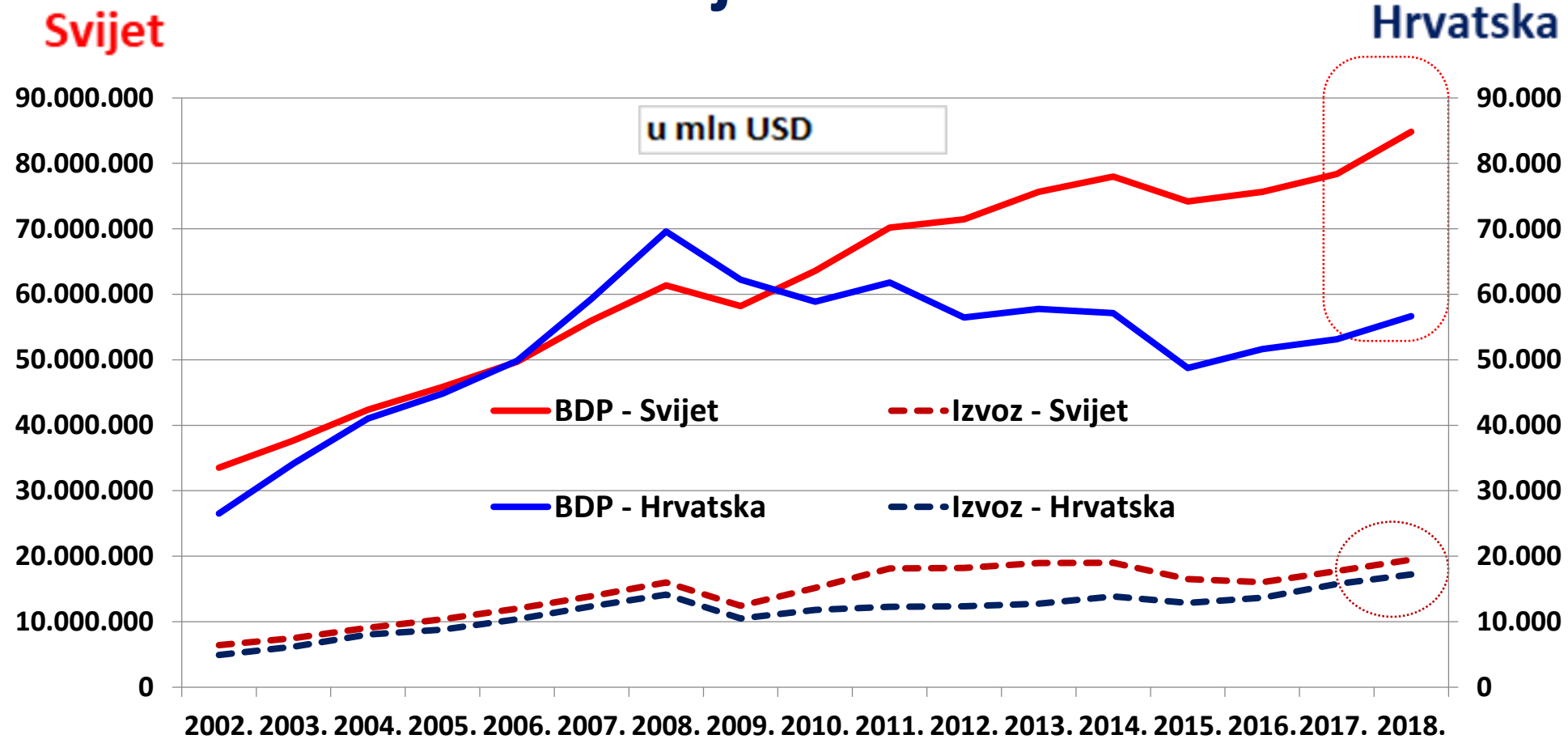


Dodana vrijednost usluga kao udio dodane vrijednosti u svjetskom izvozu

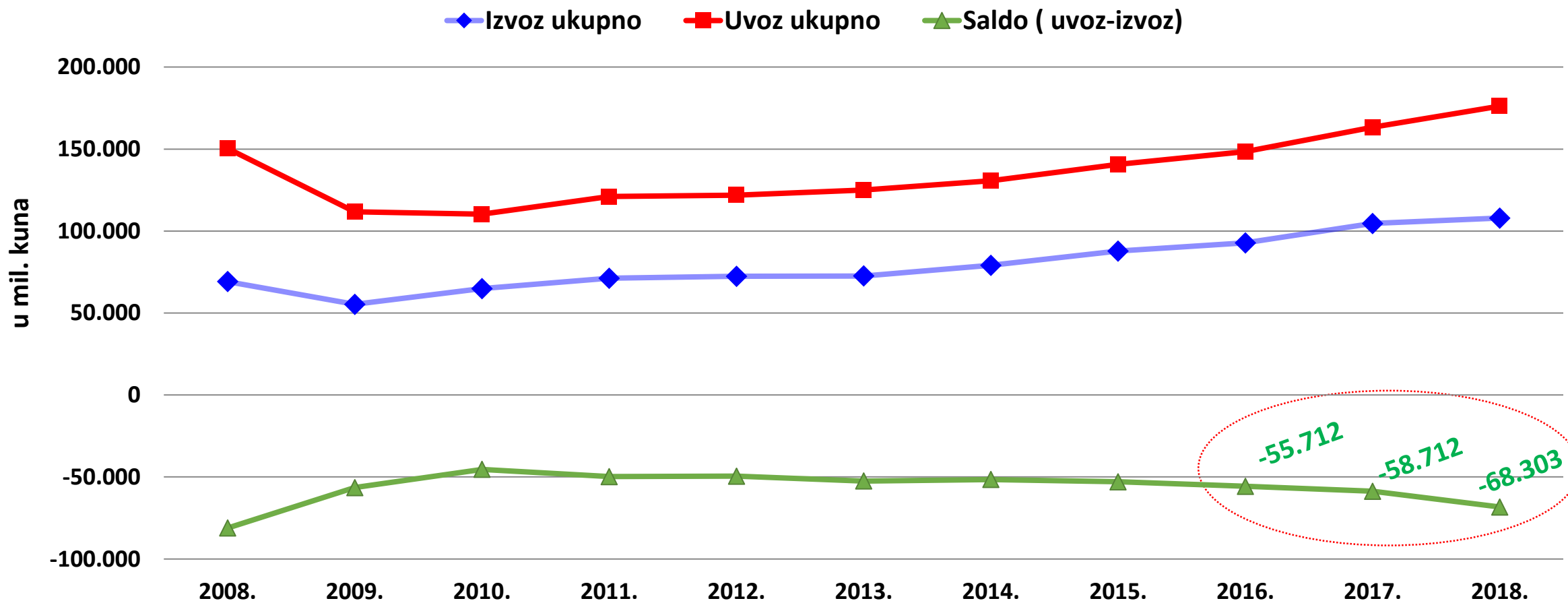


Iako usluge izravno čine samo 23% svjetske trgovine, one čine 45% ukupne dodane vrijednosti u svjetskom izvozu

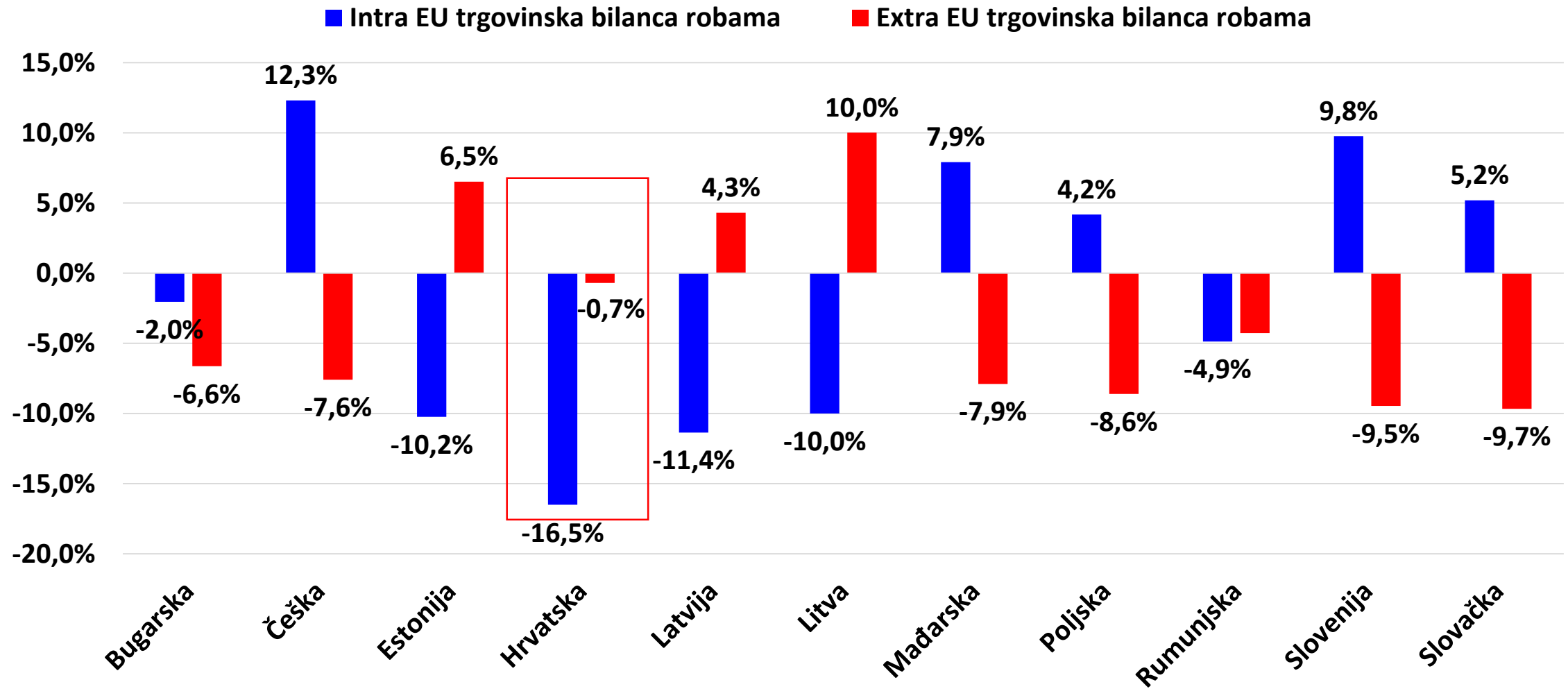
# Udio robnog izvoza u BDP-u Svijet - Hrvatska



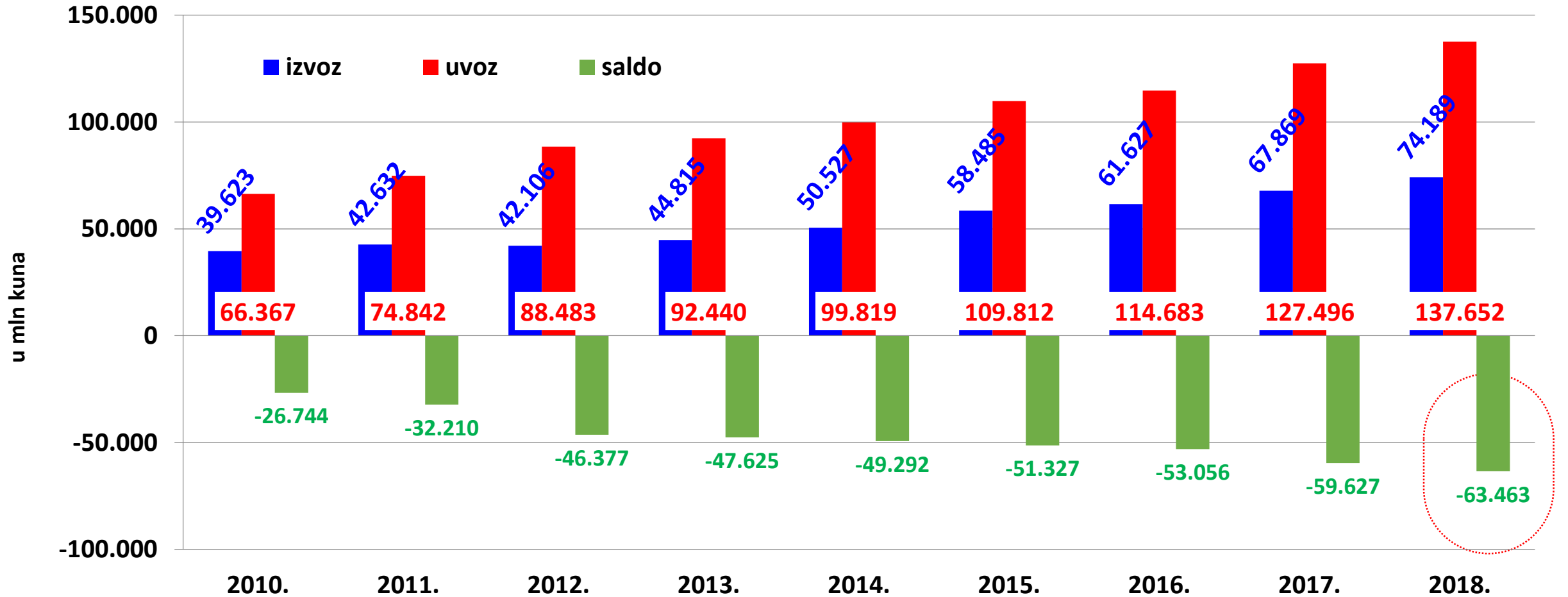
# Izvoz i uvoz roba RH 2008 - 2018. godine



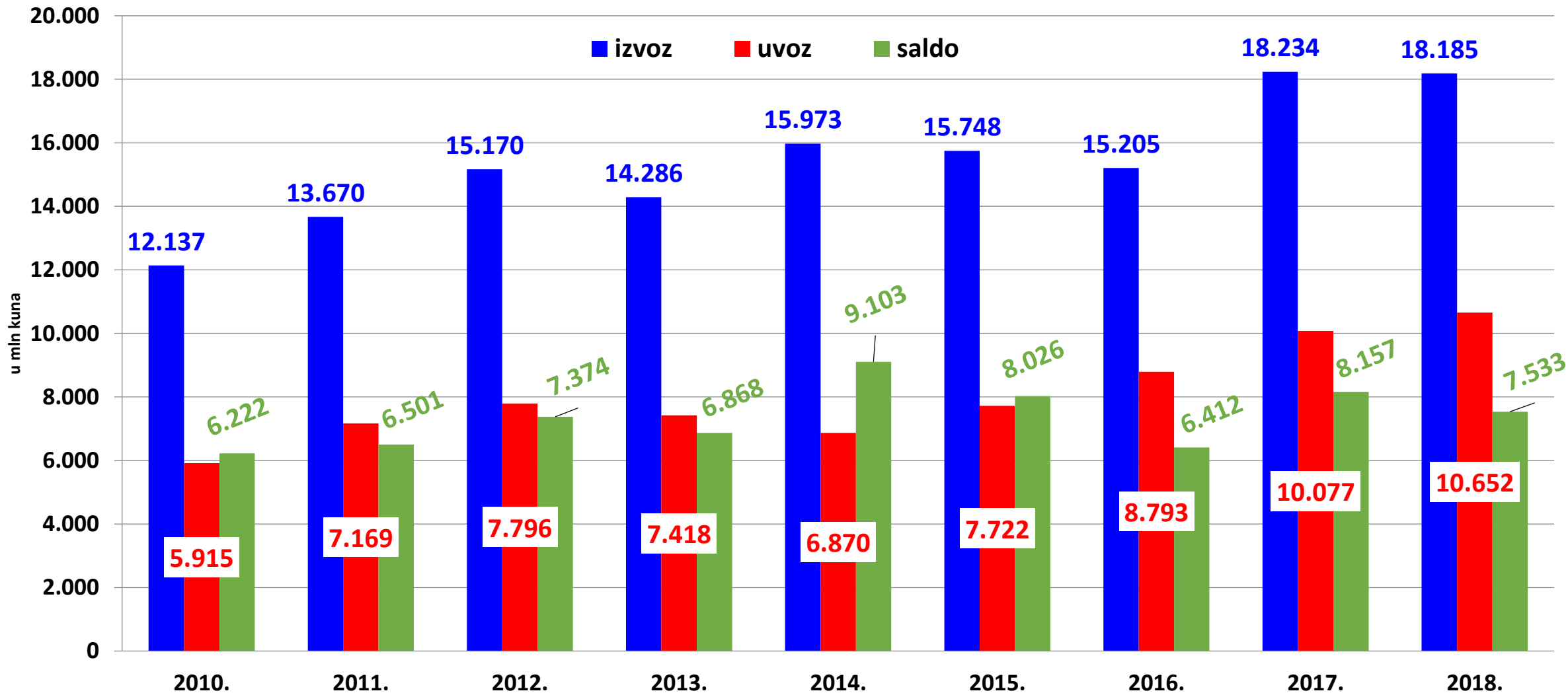
# Saldo Intra EU i Extra EU trgovinske bilance robama, u % BDP-a; 2018. godine



# Izvoz i uvoz roba RH - zemlje EU 2010 - 2018.godine

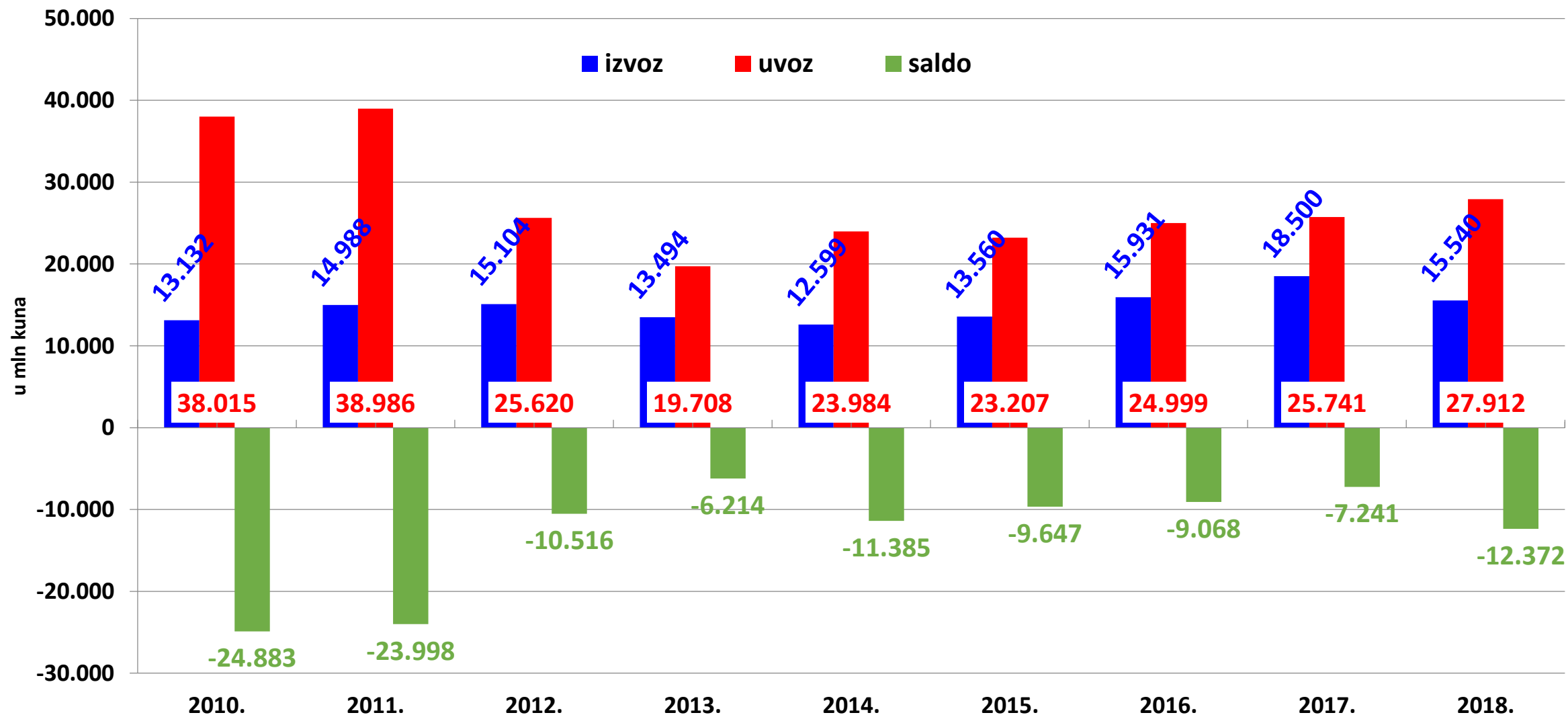


# Izvoz i uvoz roba RH - zemlje CEFTA-e 2010 - 2018. godine





# Izvoz i uvoz roba RH – ostale zemlje 2010 - 2018.godine



# Saldo izvoz-uvoz za karakteristične djelatnosti

u mln kuna

	2012.	2013.	2014.	2015.	2016.	2017.	2018.	Ukupno 2012.-2018.
drvena industrija	<b>1.534</b>	<b>1.723</b>	<b>2.361</b>	<b>2.527</b>	<b>2.466</b>	<b>2.555</b>	<b>2.738</b>	<b>15.904</b>
namještaj	<b>158</b>	<b>460</b>	<b>723</b>	<b>689</b>	<b>533</b>	<b>161</b>	<b>-591</b>	<b>2.133</b>
metalni proizvodi	<b>-4.028</b>	<b>-4.194</b>	<b>757</b>	<b>1.005</b>	<b>1.437</b>	<b>1.078</b>	<b>814</b>	<b>-3.131</b>
koža	<b>9</b>	<b>-944</b>	<b>-1.465</b>	<b>-1.040</b>	<b>-1.739</b>	<b>-1.539</b>	<b>-1.348</b>	<b>-8.066</b>
odjeća	<b>-538</b>	<b>-698</b>	<b>-1.405</b>	<b>-1.613</b>	<b>-2.109</b>	<b>-2.307</b>	<b>-2.789</b>	<b>-11.459</b>
farmacija	<b>-1.733</b>	<b>-1.839</b>	<b>-2.207</b>	<b>-2.008</b>	<b>-2.618</b>	<b>295</b>	<b>-2.004</b>	<b>-12.114</b>
koks, el. energija, plin	<b>-3.419</b>	<b>-2.053</b>	<b>-3.666</b>	<b>-3.441</b>	<b>-1.969</b>	<b>-863</b>	<b>335</b>	<b>-15.076</b>
kemikalije	<b>-5.686</b>	<b>-5.524</b>	<b>-5.616</b>	<b>-6.096</b>	<b>-6.602</b>	<b>-6.881</b>	<b>-7.020</b>	<b>-43.425</b>
prehrana	<b>-5.157</b>	<b>-5.967</b>	<b>-6.174</b>	<b>-6.421</b>	<b>-5.898</b>	<b>-7.145</b>	<b>-8.043</b>	<b>-44.805</b>

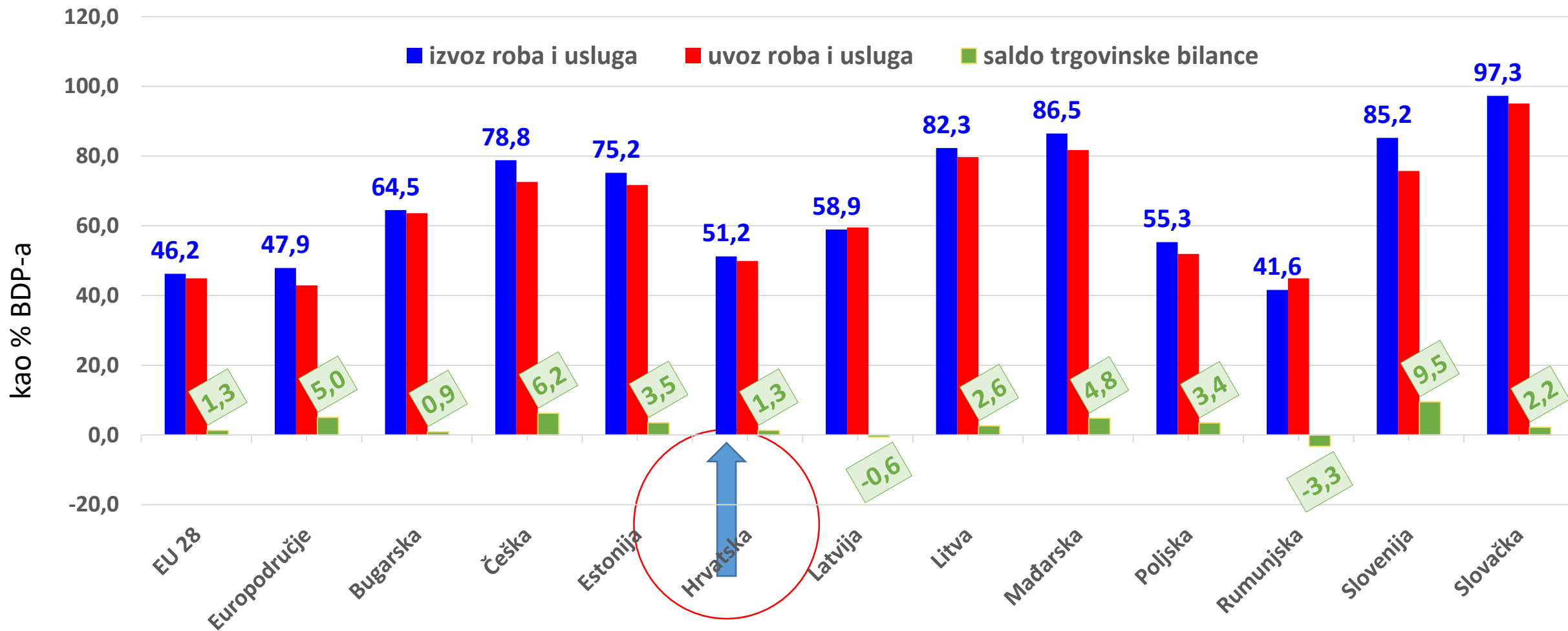
# RH – izvoz/uvoz

## 2012 - 2018.godine

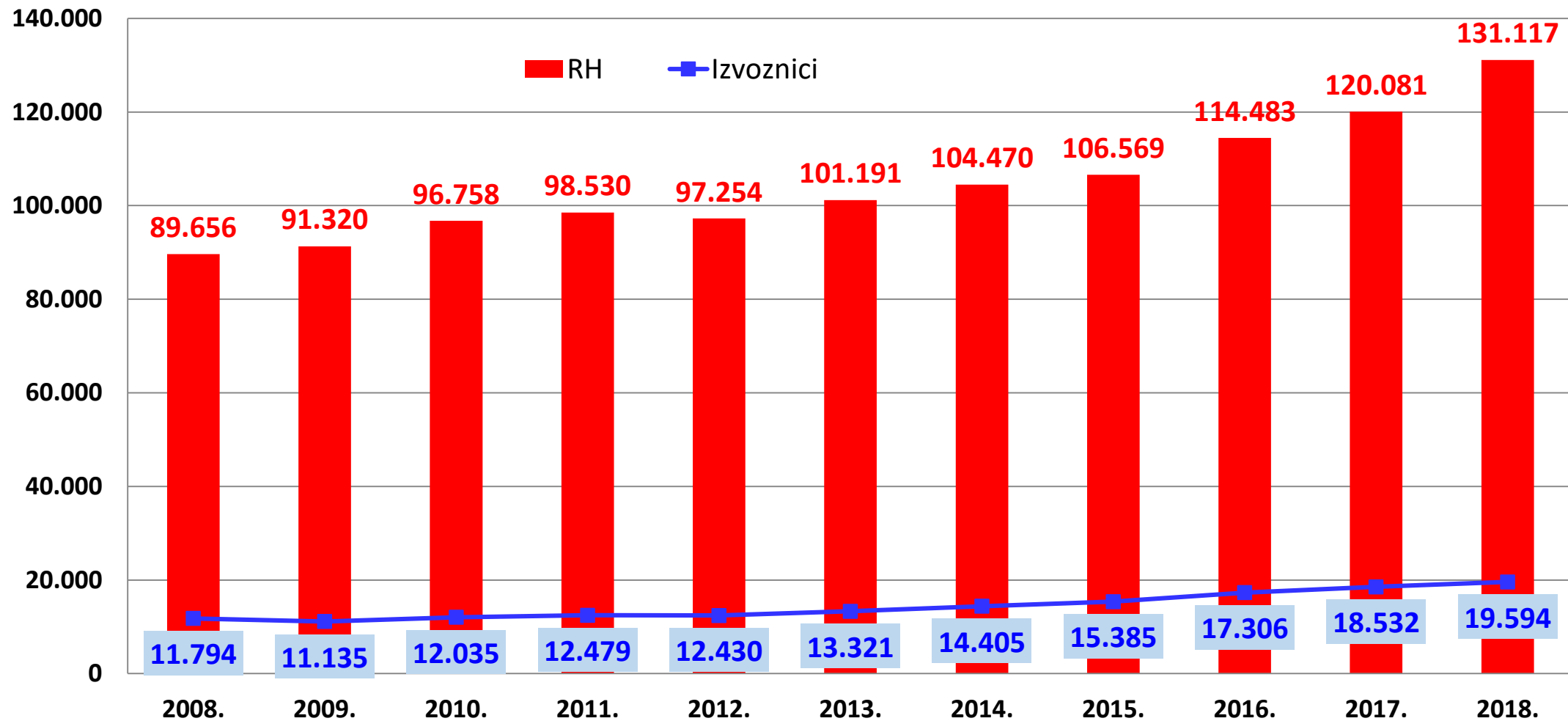
	2012.	2013.	2014.	2015.	2016.	2017.	2018.	Indeks 2018/2012
<b>Izvoz kuna (mlrd)</b>	<b>72.380</b>	<b>72.595</b>	<b>79.099</b>	<b>87.772</b>	<b>92.763</b>	<b>104.601</b>	<b>107.913</b>	<b>149,1</b>
Vrijednosti u EUR (mlrd)	9.629	9.589	10.369	11.528	12.317	13.983	14.543	<b>151,0</b>
EUR/tone	726,7	650,9	682,6	712,9	719,8	783,2	827,3	<b>113,8</b>
<b>Uvoz kuna (mlrd)</b>	<b>121.899</b>	<b>125.052</b>	<b>130.673</b>	<b>140.748</b>	<b>148.475</b>	<b>163.313</b>	<b>176.216</b>	<b>144,6</b>
Vrijednosti u EUR (mlrd)	16.214	16.528	17.129	18.482	19.712	21.808	23.748	<b>146,5</b>
EUR/tone	1.050,8	1.049,3	1.121,0	1.091,8	1.077,5	1.152,6	1.197,9	<b>114,0</b>
av. EUR-o/kune	7,51	7,57	7,63	7,61	7,53	7,46	7,41	98,7

# Izvoz i uvoz roba i usluga Hrvatske i zemalja usporedivih značajki, kao % nacionalnog BDP-a

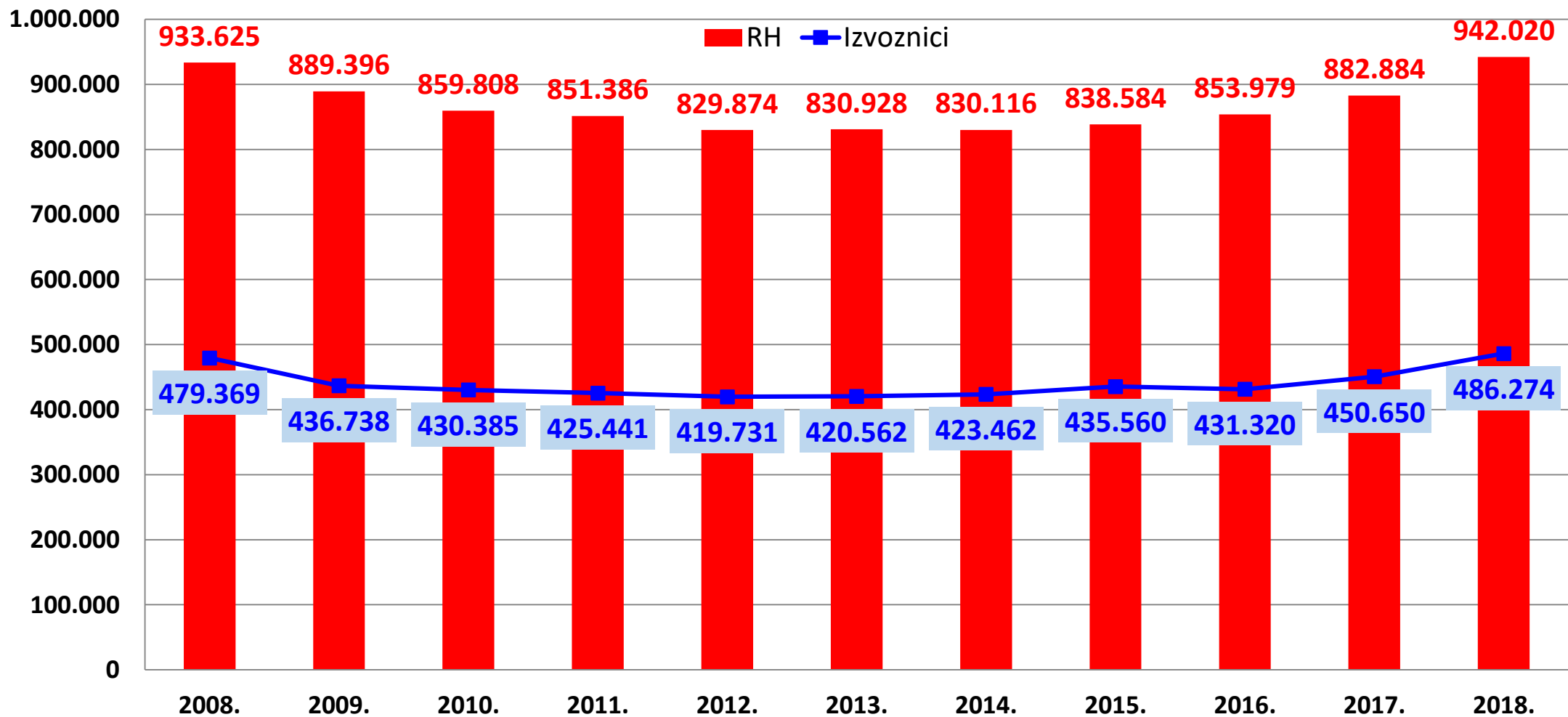
2018.



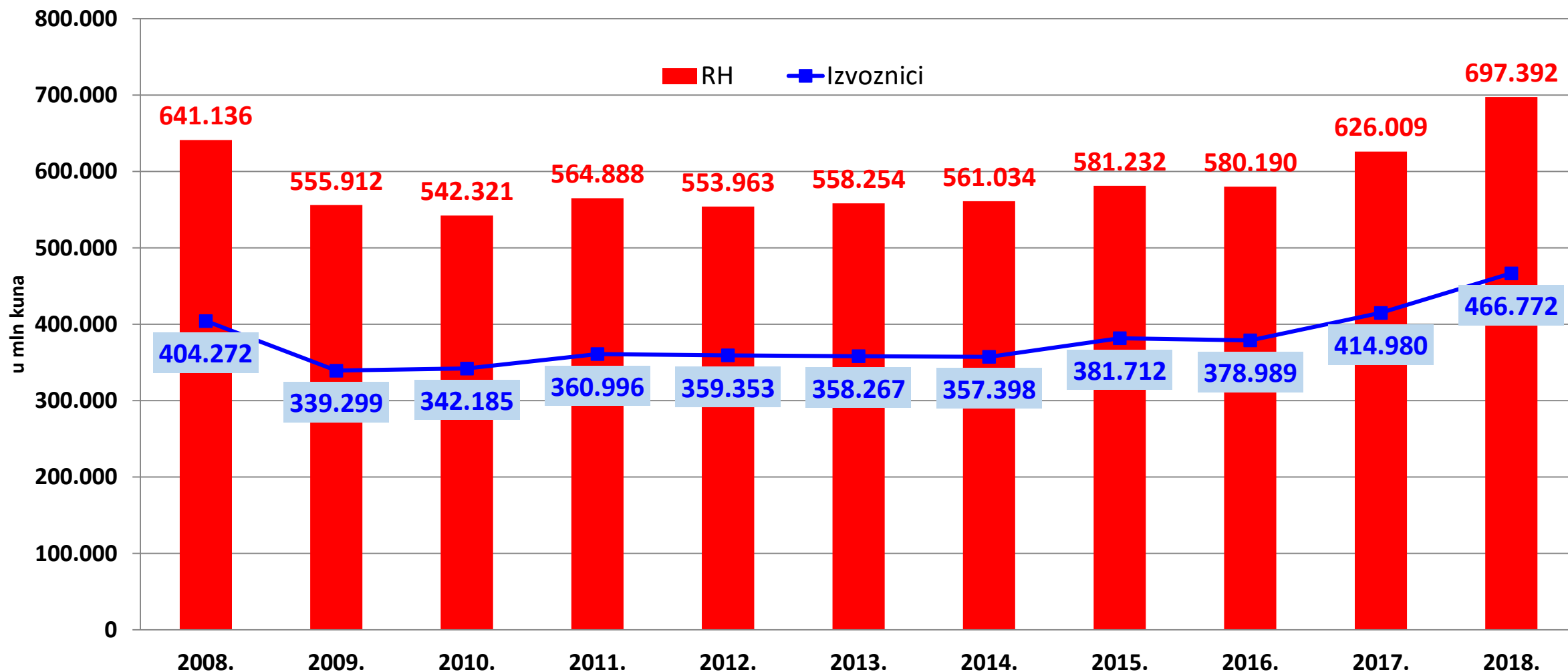
# Broj poduzeća ukupno RH/Izvoznici



# Broj zaposlenih ukupno RH/Izvoznici

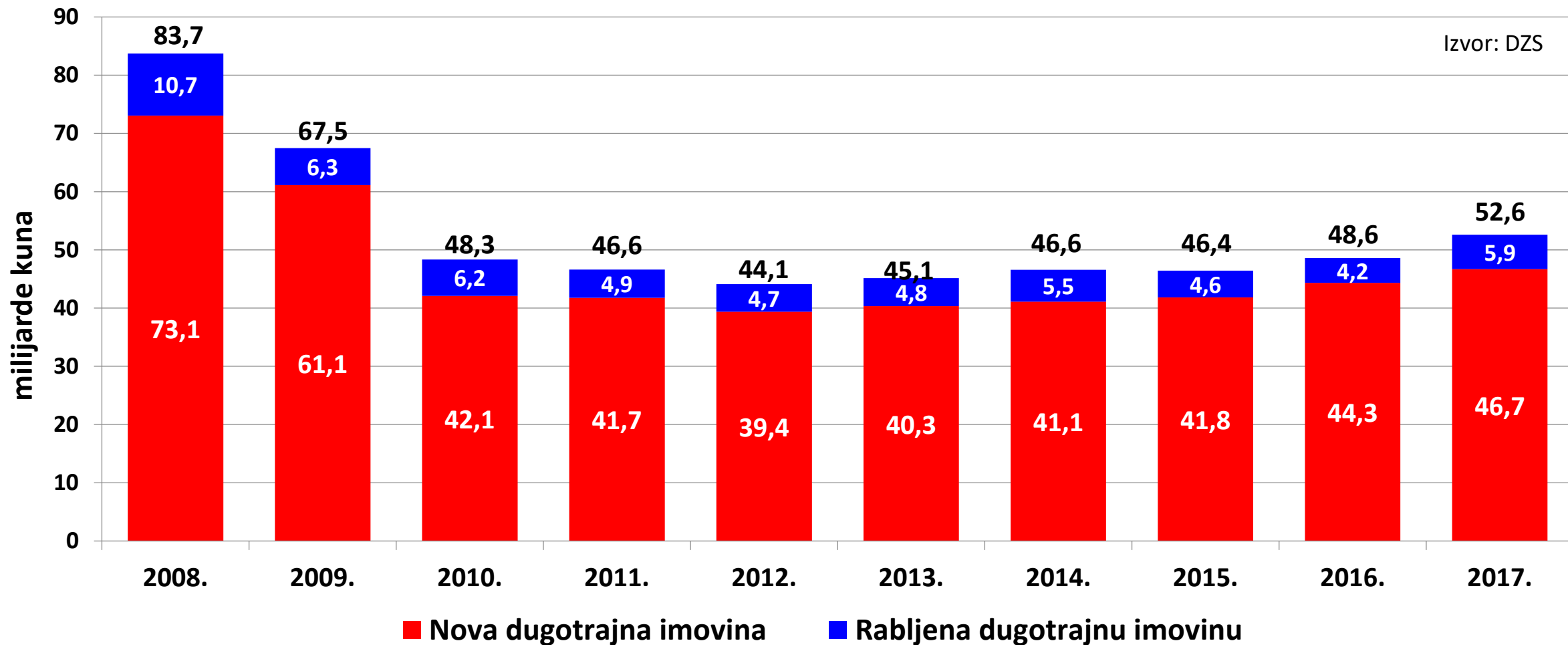


# Prihodi od prodaje proizvoda i usluga RH/Izvoznici



# Bruto investicije u **novu** i **rabljenu** dugotrajnu imovinu

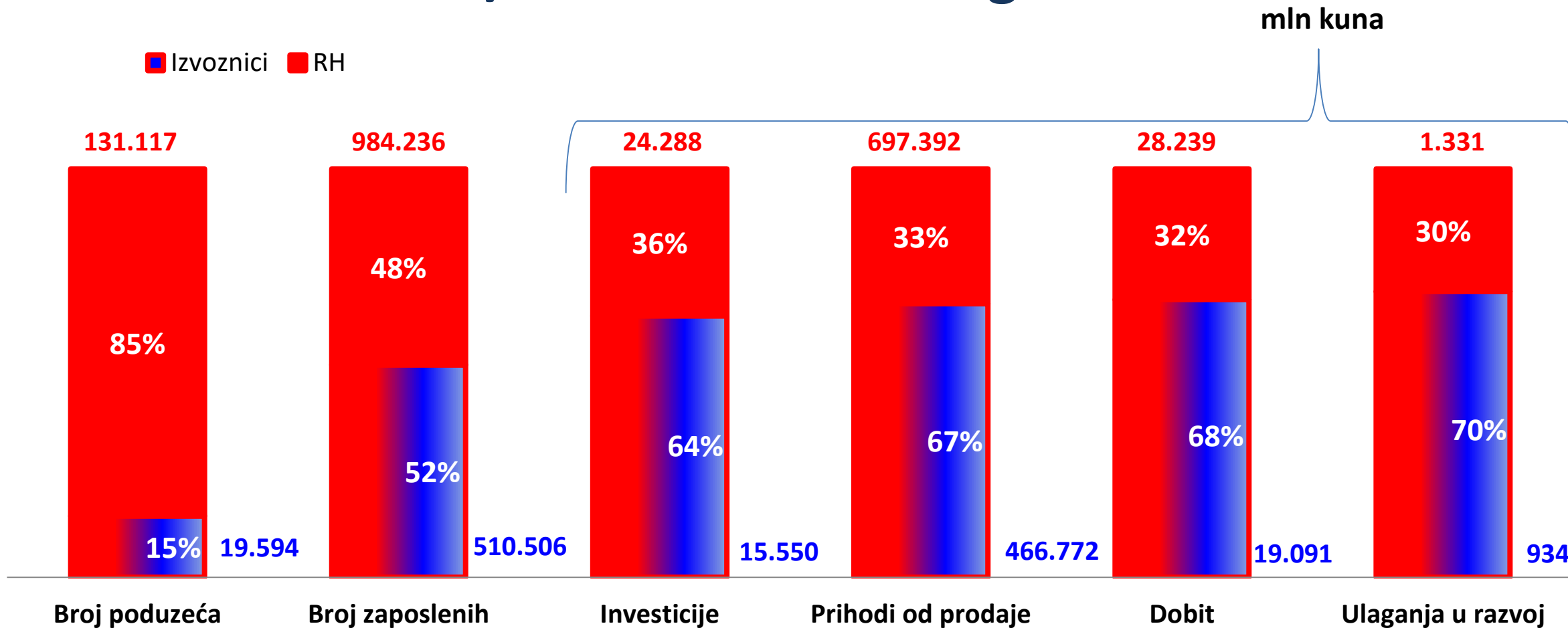
(milijarde kuna)



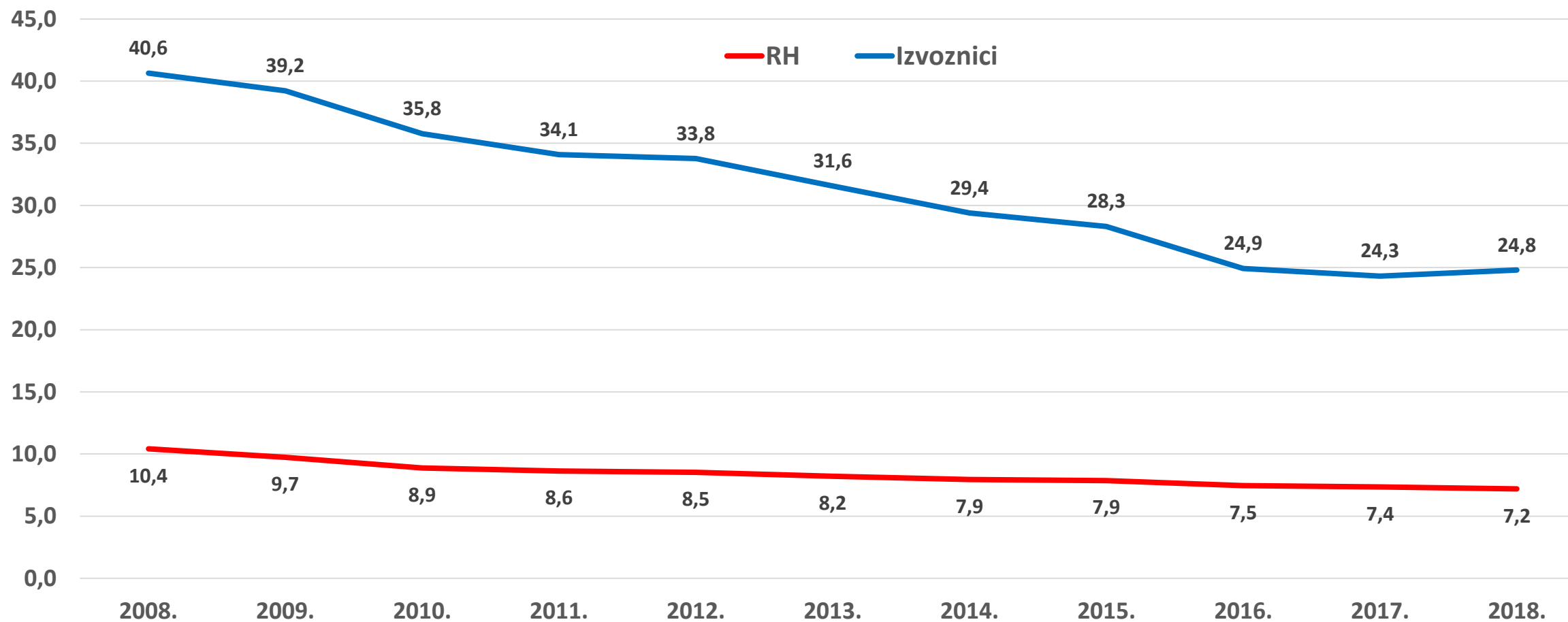


# Sažetak

## RH/Izvoznici za 2018. godinu



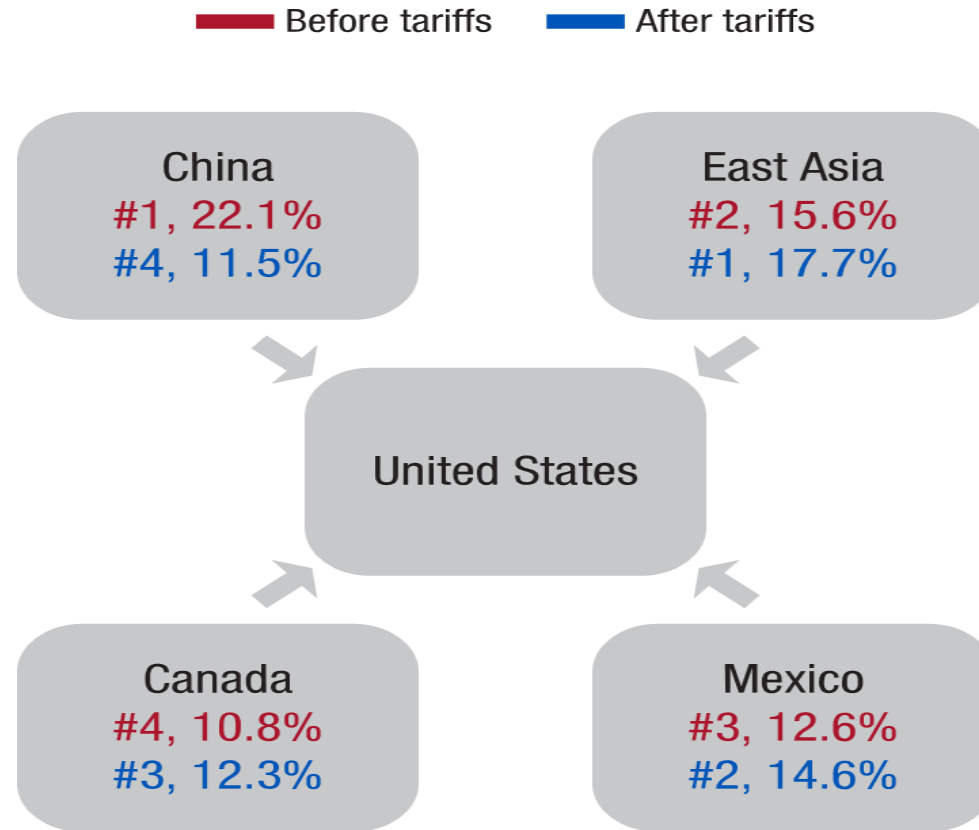
# Broj zaposlenih po poduzeću



# Samo neka od obilježja svijeta u kojem hrvatski izvoznici posluju

- Slabljenje gospodarske pozicije SAD-a i zemalja EU
- Jačanje gospodarske snage G20
- Smanjivanje utjecaja banaka i rast utjecaja fondova na gospodarstvo svijeta
- Jačanje političkih napetosti između SAD-a – Rusije – Kine
- Nestabilnosti cijelih regija
- **Snažno jača ideja protekcionalizma**
- **Jača ideja državnog intervencionizma i reprivatizacije**
- **Digitalizacija osigurava revolucionarne promjene u gospodarstvu ali i u društvu u cjelini**

# Uvoz elektronike i strojeva prije i poslije tarifa - SAD



Sources: Caliendo and others (2017) model; and IMF staff calculations.

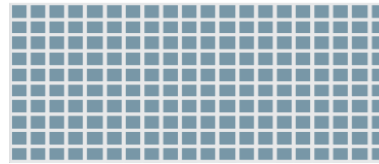
Note: #x means rank, xx% means share in total US imports of electronics.

# Očekuje se da će rast električnih vozila smanjiti trgovinu auto-dijelovima i naftom

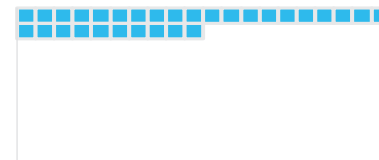
## Reduction in vehicle parts trade

Moving parts of

a traditional powertrain

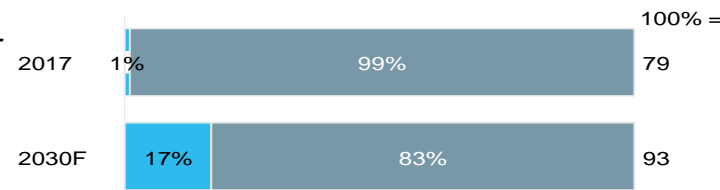


Moving parts of an EV powertrain



## Total global car sales

%; million

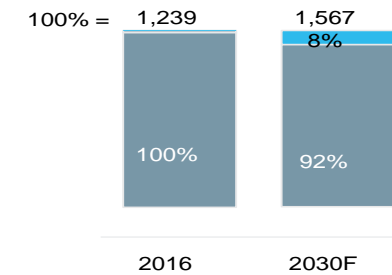


<sup>1</sup> Refers to the total of all registered cars on the road.  
NOTE: Figures may not sum to 100% because of rounding.

■ Traditional/gasoline cars  
■ Electric vehicles (EVs)

## Total global car parc<sup>1</sup>

%; million cars



## Estimated trade effects by 2030

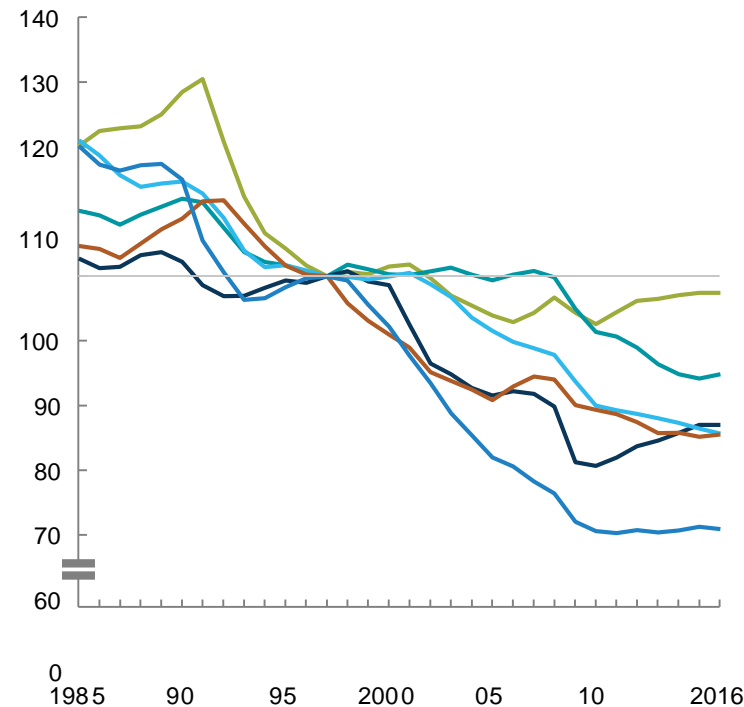
Up to **\$69B** annual reduction in oil trade

~**10%** reduction in vehicle parts trade



# Većina razvijenih gospodarstava izgubila je proizvodna radna mjesta od 1990-ih.

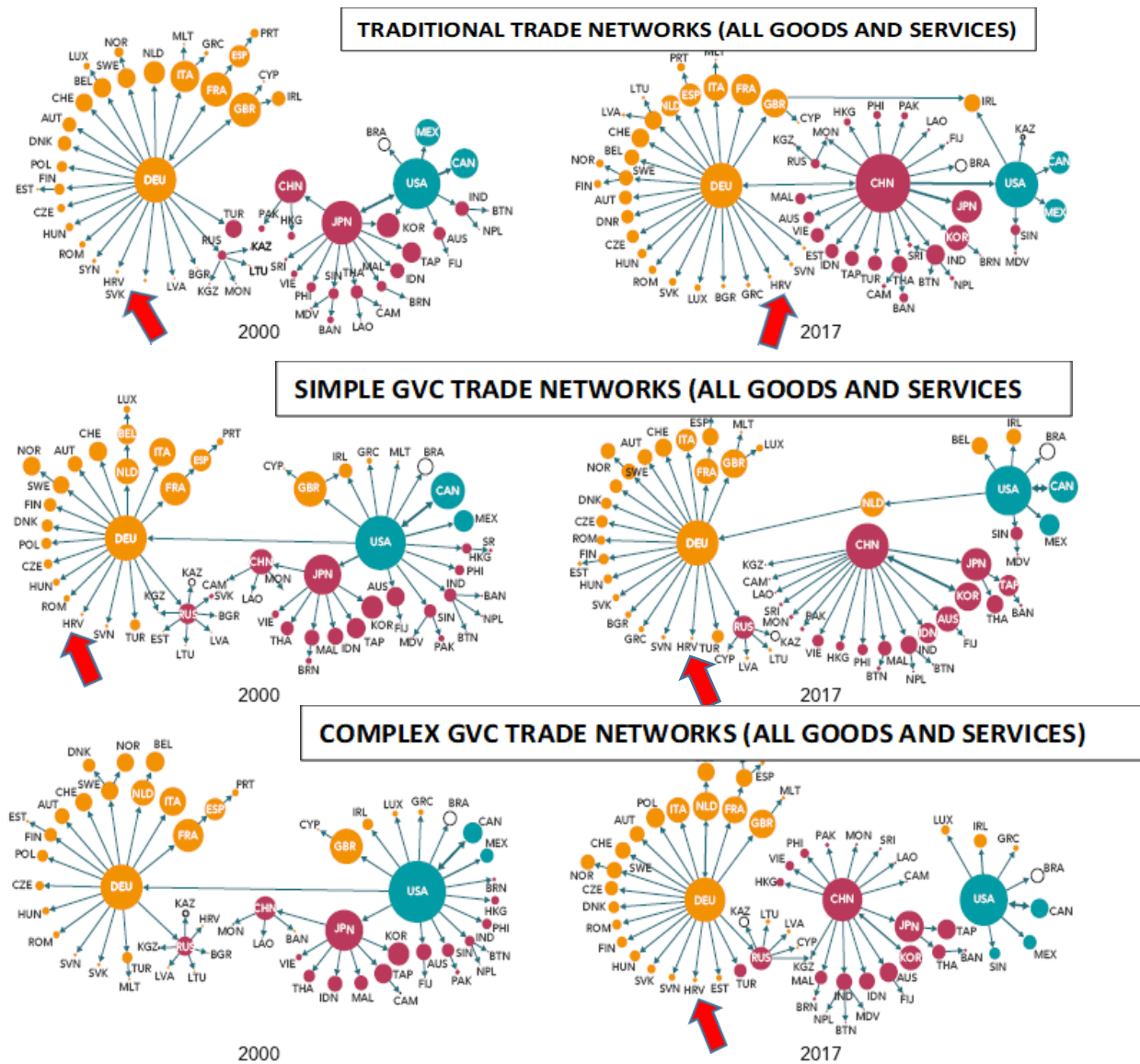
Manufacturing employment  
Index: 100 = 1997



	Manufacturing employment	% of manufacturing over total economy, 2016	
		Value added	Employment
	% change since 1997		
Germany	-3	20	19
Italy	-15	15	19
United States	-23	12	9
France	-24	10	10
Japan	-25	18	17
United Kingdom	-39	9	9

SOURCE: The Conference Board, OECD; International Labor Comparisons program, May 2017; McKinsey Global Institute analysis

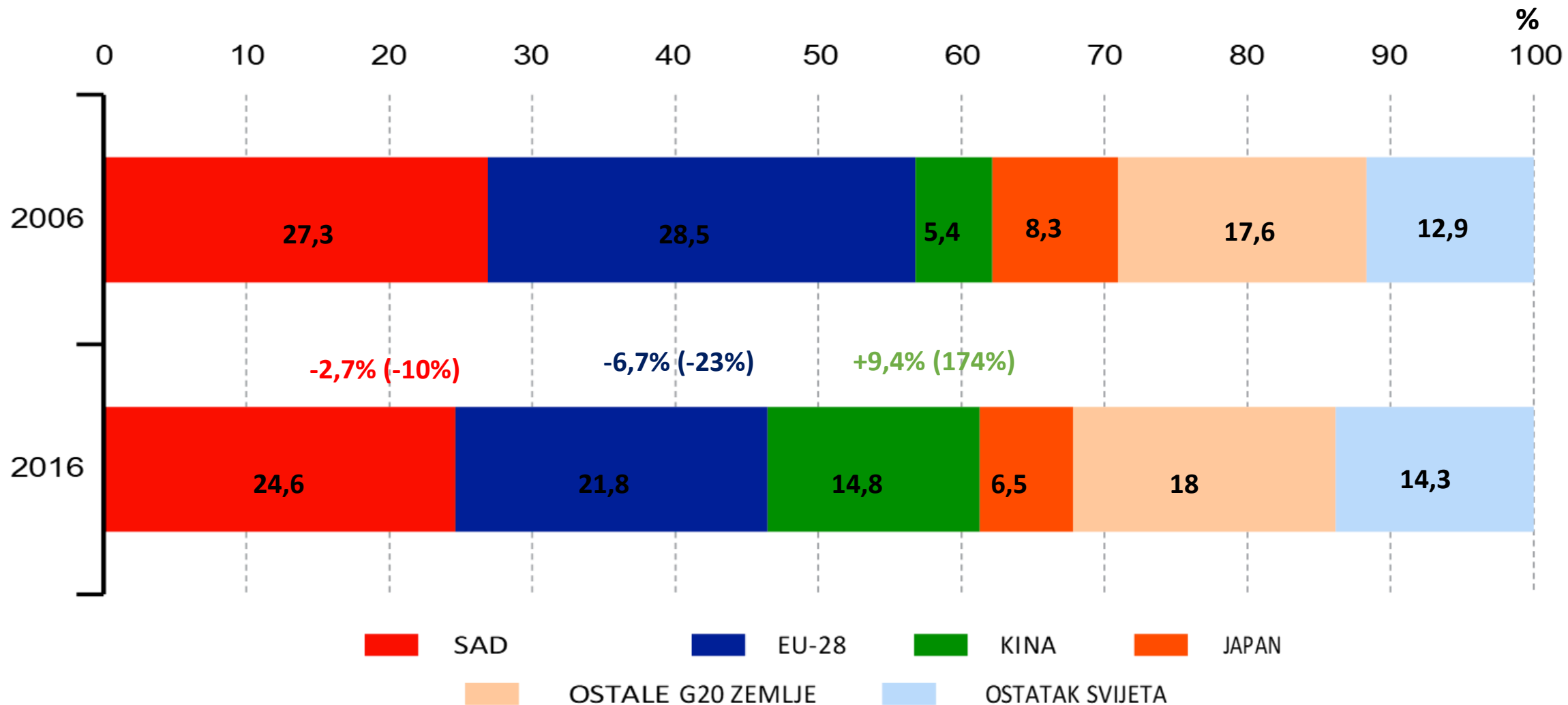
**FIGURE 1.15** Supply hubs of trade in value-added in various networks at the aggregate level



Note: the size of the circles represents the magnitude of value-added exports. The volume of value-added flow between each pair of trading partners is represented by the thickness of the line linking the two.

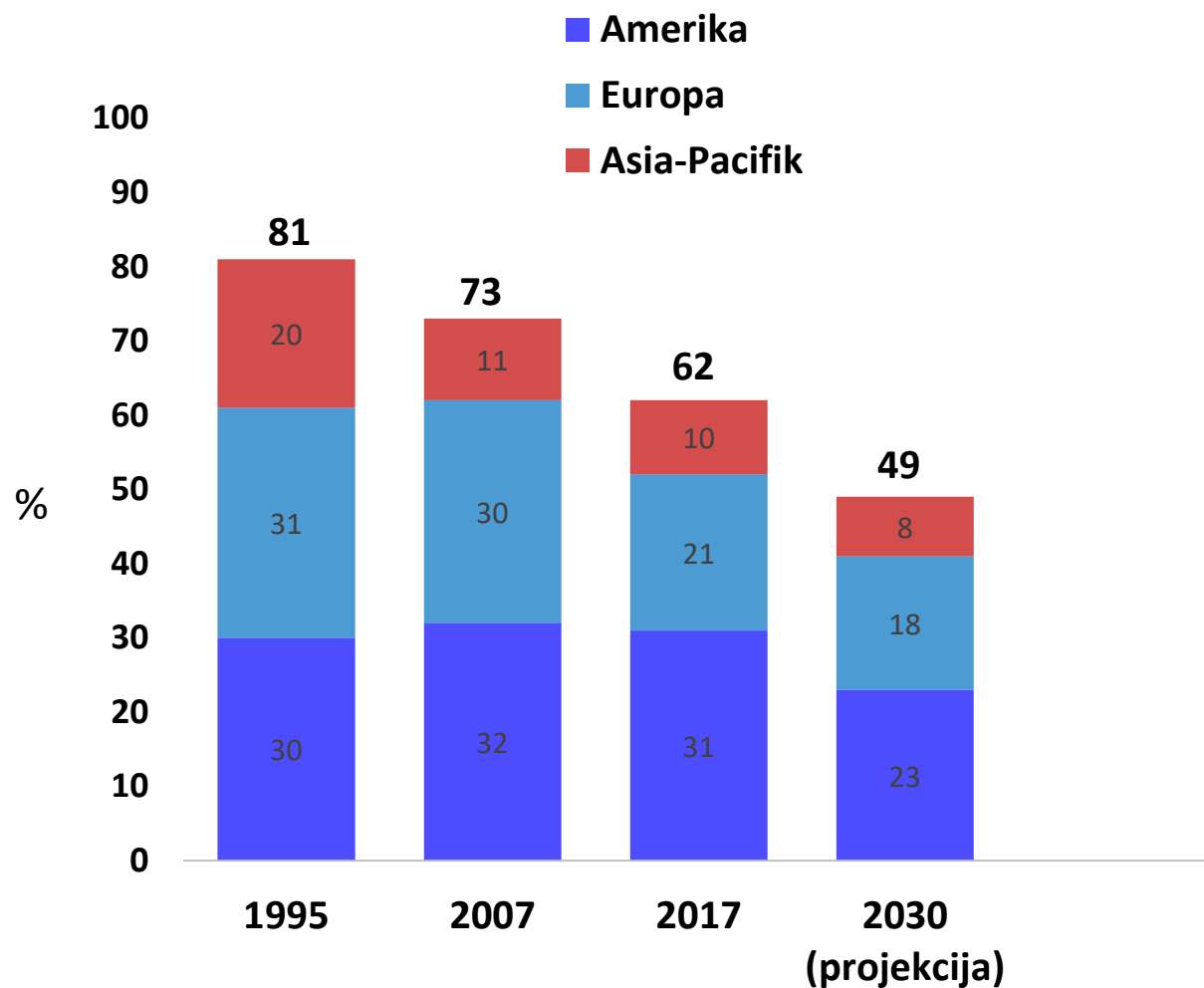
Source: Meng et al. (2018) based on the UIBE GVC indexes derived from the ADB 2018 ICIO table.

# Udio u svjetskom BDP-u 2006. godine i 2016. godine

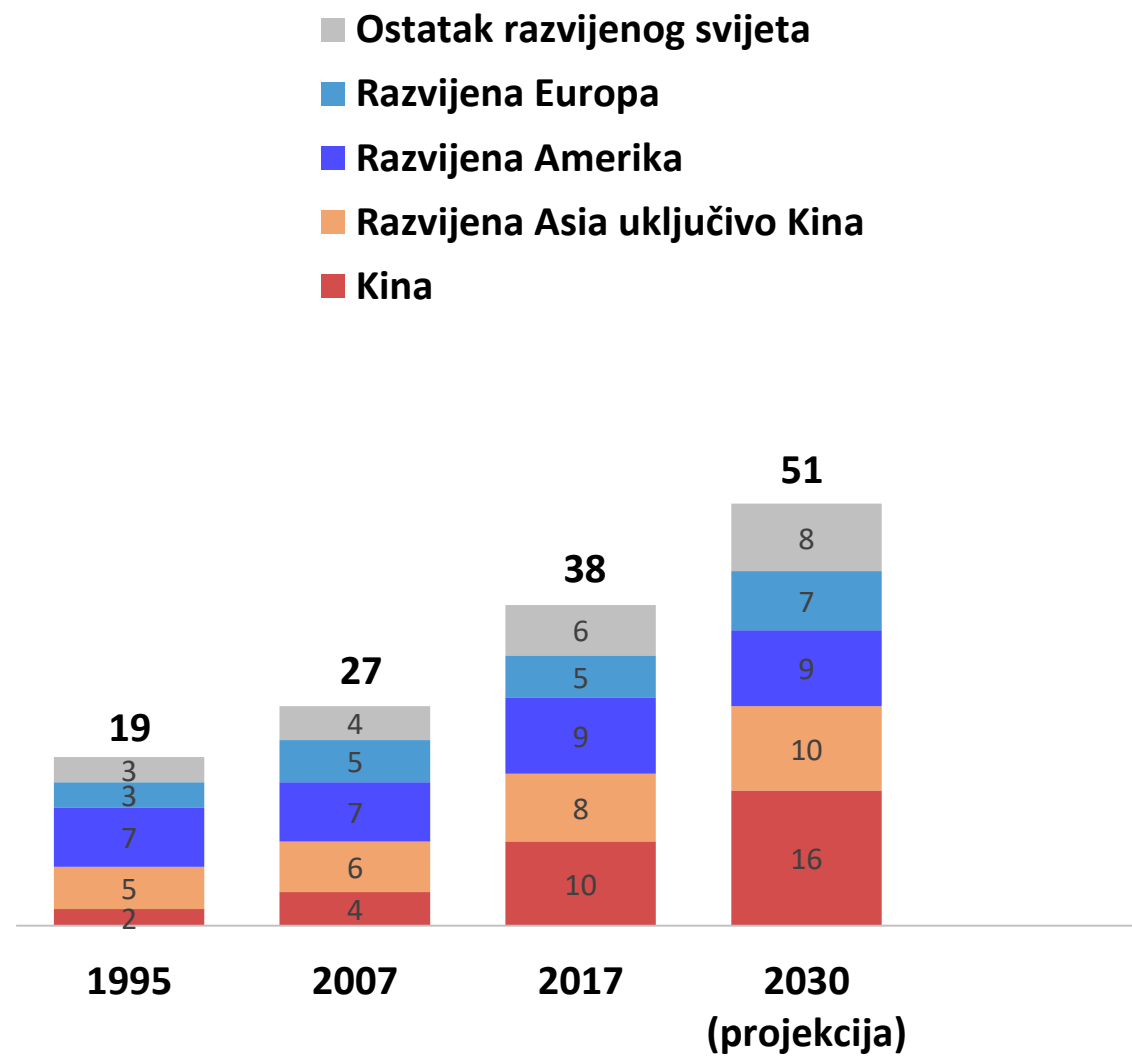




## Udio razvijenih gospodarstava u globalnoj potrošnji po regijama



## Udio ekonomija u razvoju u globalnoj potrošnji po regijama



**Državna zabrana preuzimanja poduzeća od strane stranih konkurenata mora se i u budućnosti temeljiti na strogim uvjetima, a isto je moguće samo ako je neophodno kao obrana od rizika za nacionalnu sigurnost uključujući i područje ključne infrastrukture.**

„The state prohibition of company takeovers by foreign competitors must be based on strict requirements in future too and may only happen if this is necessary to defend against risks to national security, including the area of critical infrastructures.”

**Kada se pokušaji preuzimanja fokusiraju na tehnologiju i inovacijsko vodstvo, a ne na praćenje državnog interesa na području sigurnosti, prvenstveno je zadatak njemačkog privatnog sektora i njegovih dionika da spriječe takva preuzimanja odgovarajućim ponudama. U tim slučajevima, država može ponuditi ohrabrenje i podršku.**

„Where takeover attempts concern technology and innovation leadership rather than primarily following the state interest in security, it is above all a matter for the private German sector and its stakeholders to prevent such takeovers by suitable bids. In these cases, the state can provide encouragement and support.”

**Samo u izuzetno važnim slučajevima država može biti kupac dionica i samo tijekom ograničenog razdoblja. Sve u svemu, udio države se dugoročno ne smije povećati, zbog čega se razmatra uspostava nacionalne ustanove za sudjelovanja čiji je zadatak redovito izvještavati parlament o opsegu novog učešća. U načelu, preuzimanje novih udjela mora biti uravnoteženo privatizacijom drugih.**

„Only in very important cases should the state be able to act as buyer of shares for a restricted period of time. All in all, the stake held by the state may not increase in the long term, however, which is why the creation of a national participation facility comes into consideration with the requirement of reporting to parliament on a regular basis about the extent of any participation.

Taking-over of new stakes must in principle be balanced by the privatisation of others.”

**Više nije pitanje kako osigurati snažniji rast hrvatskog izvoza roba i usluga  
s većom novostvorenom vrijednošću**

**već**

**Kako preživjeti sve ove promjene**

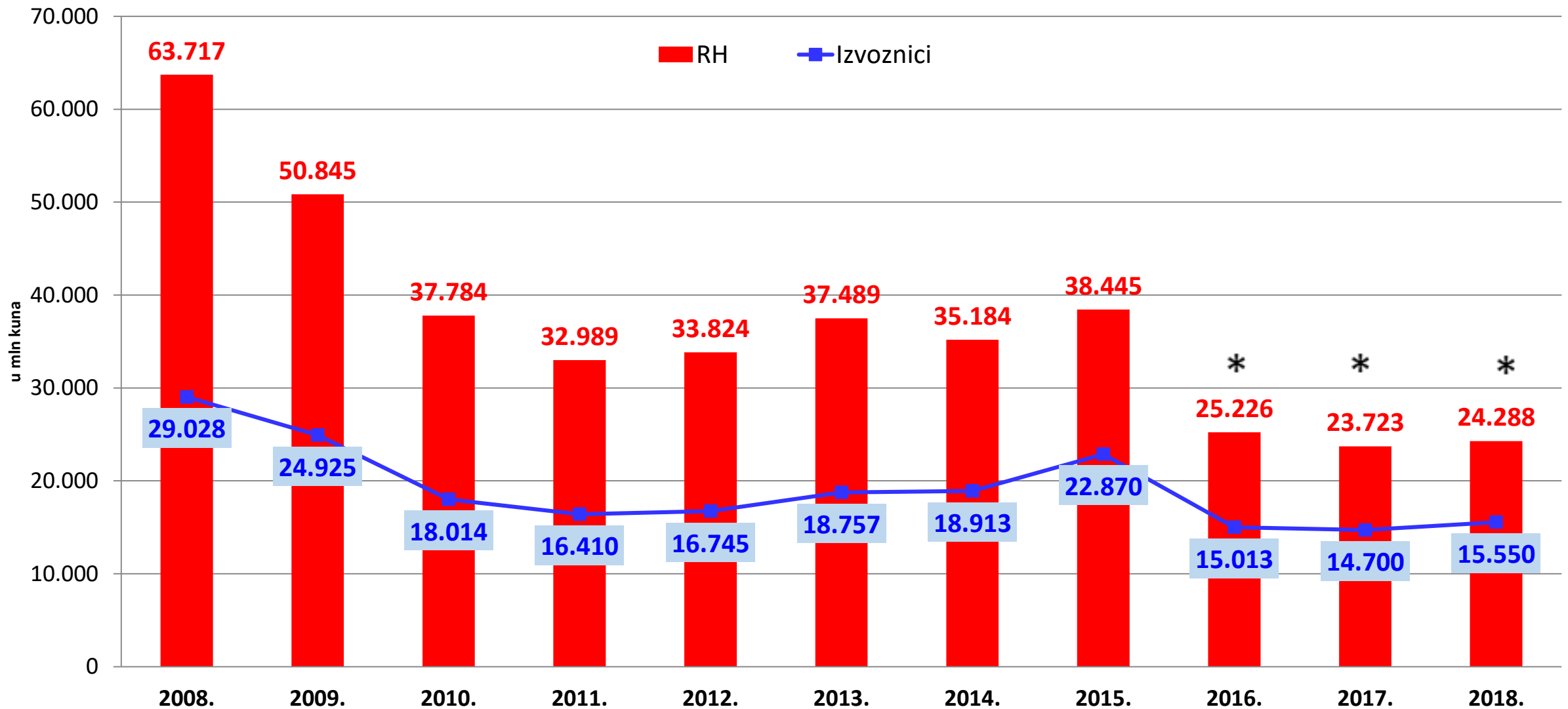
**Ovi primjeri služe kao  
uvod u panel koji slijedi  
nakon stanke**

**HVALA NA POZORNOSTI**

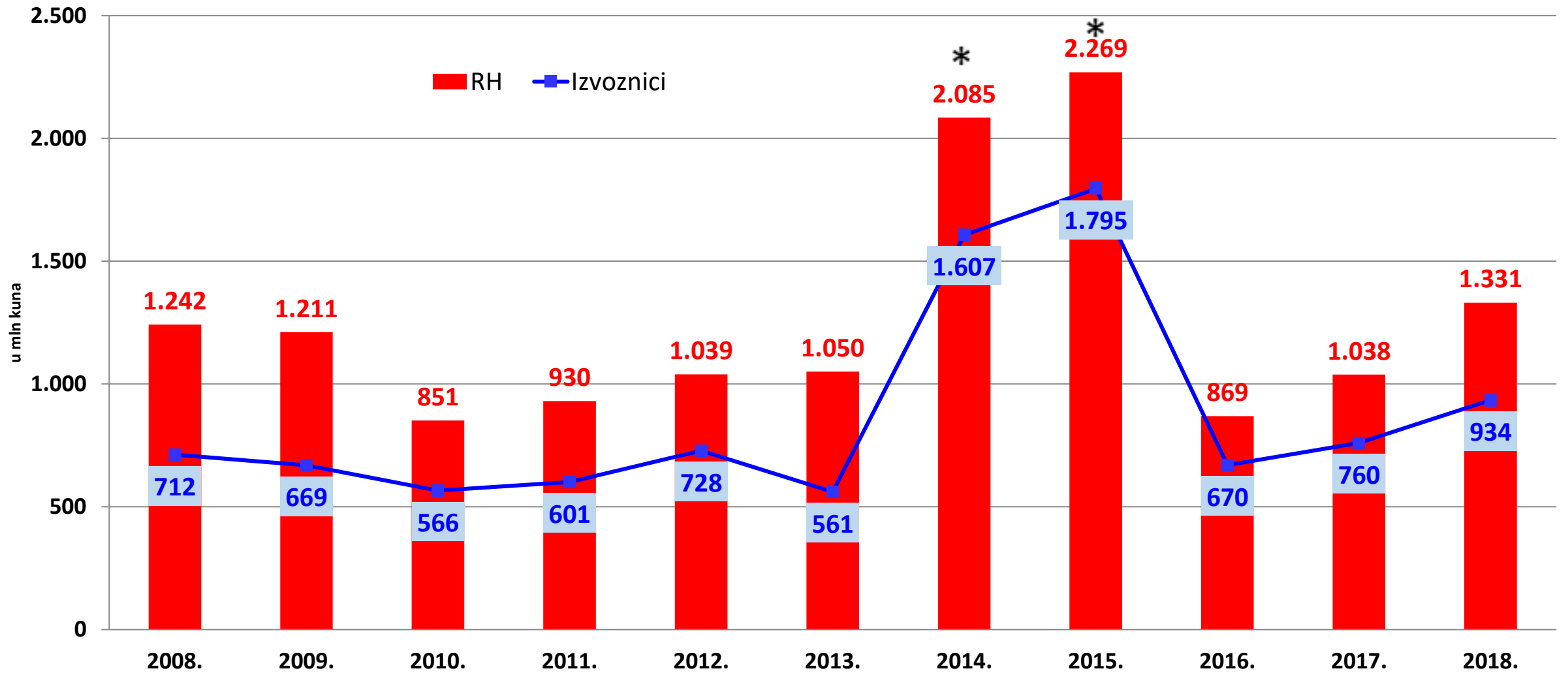
# Dodatni slajdovi



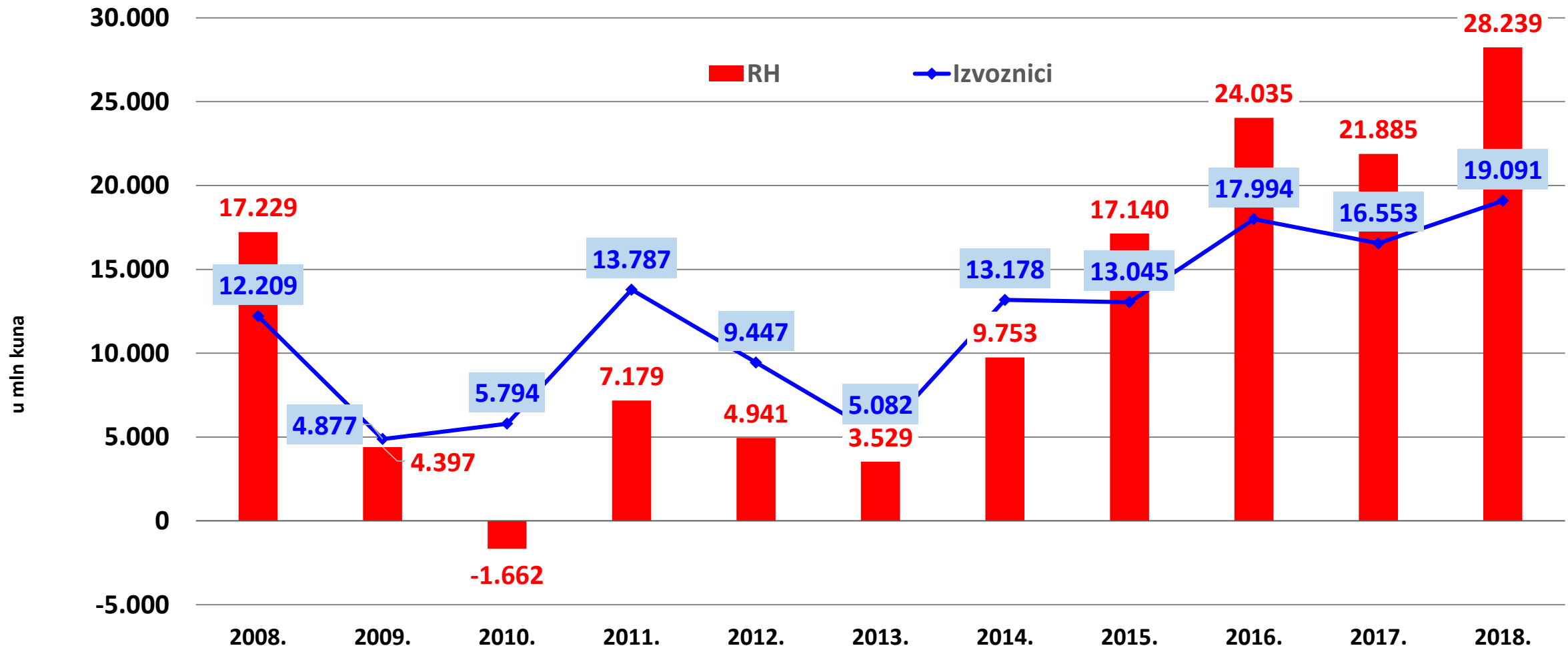
# Investicije ukupno RH/Izvoznici



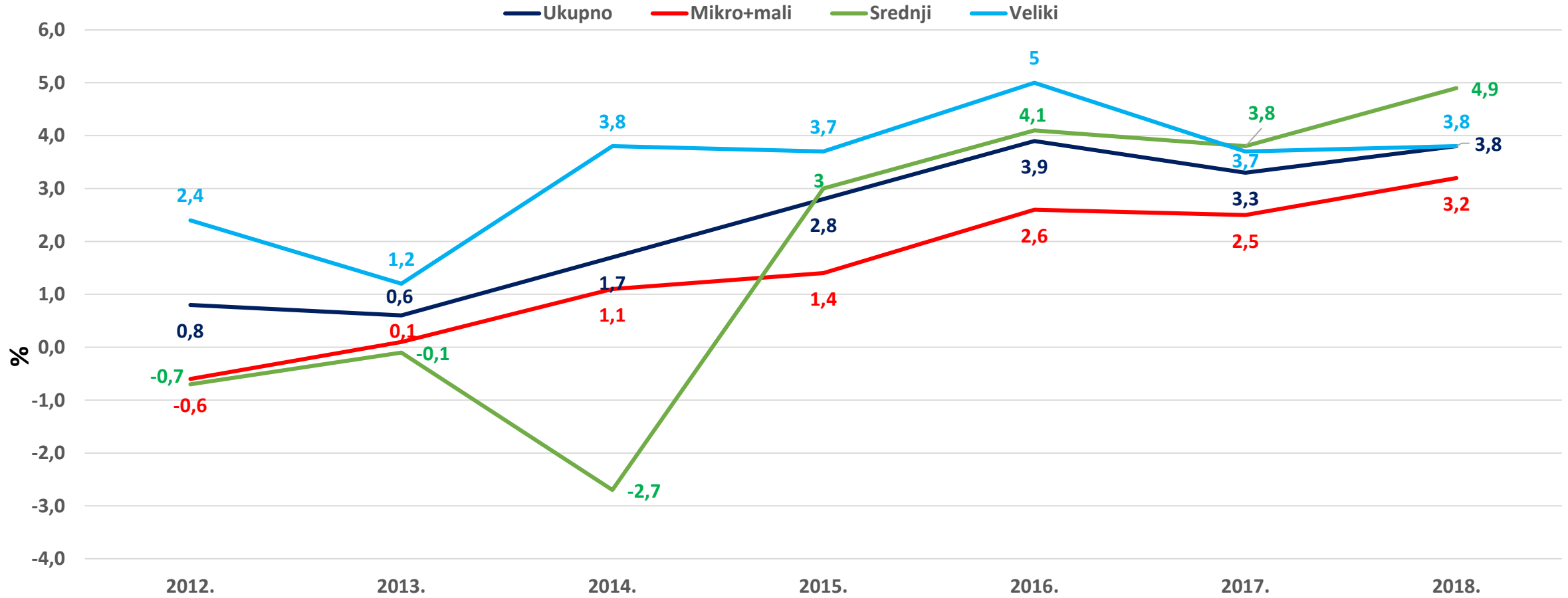
# Ulaganja u razvoj ukupno RH/Izvoznici



# Dobit-gubitak (nakon poreza) RH/Izvoznici

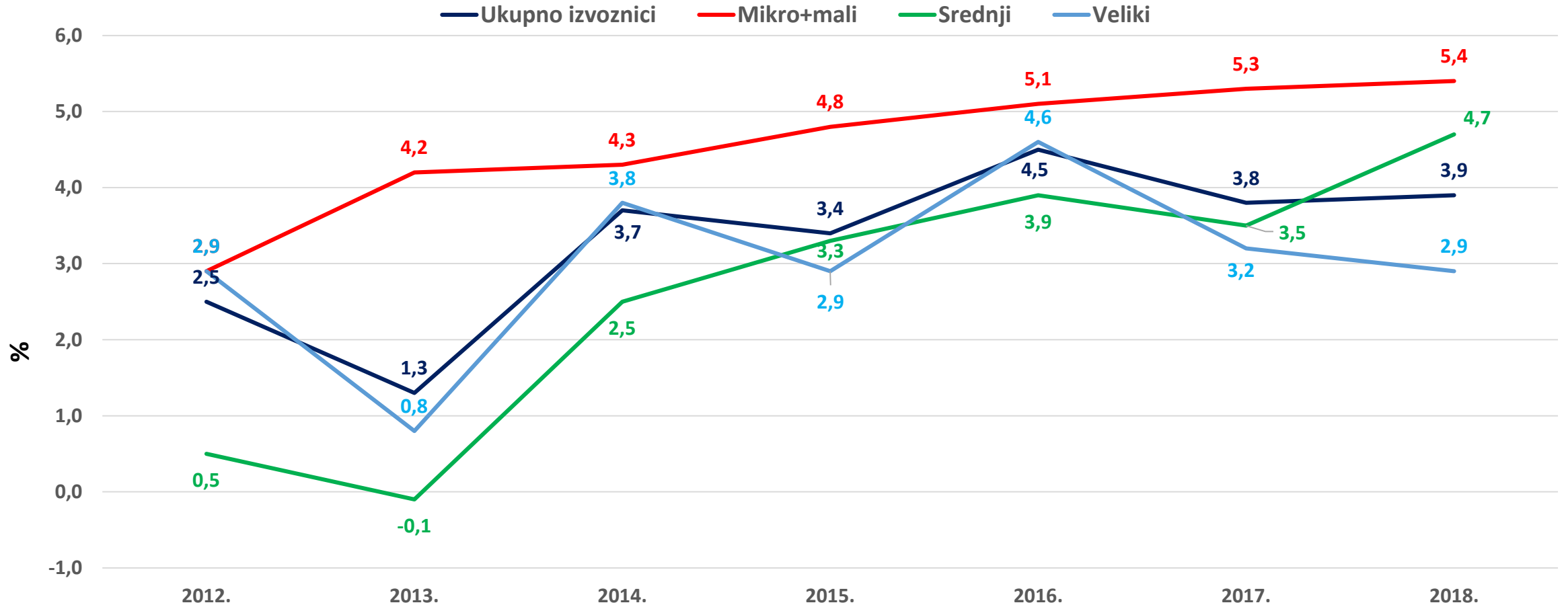


# Ukupno RH dobit/poslovni prihod



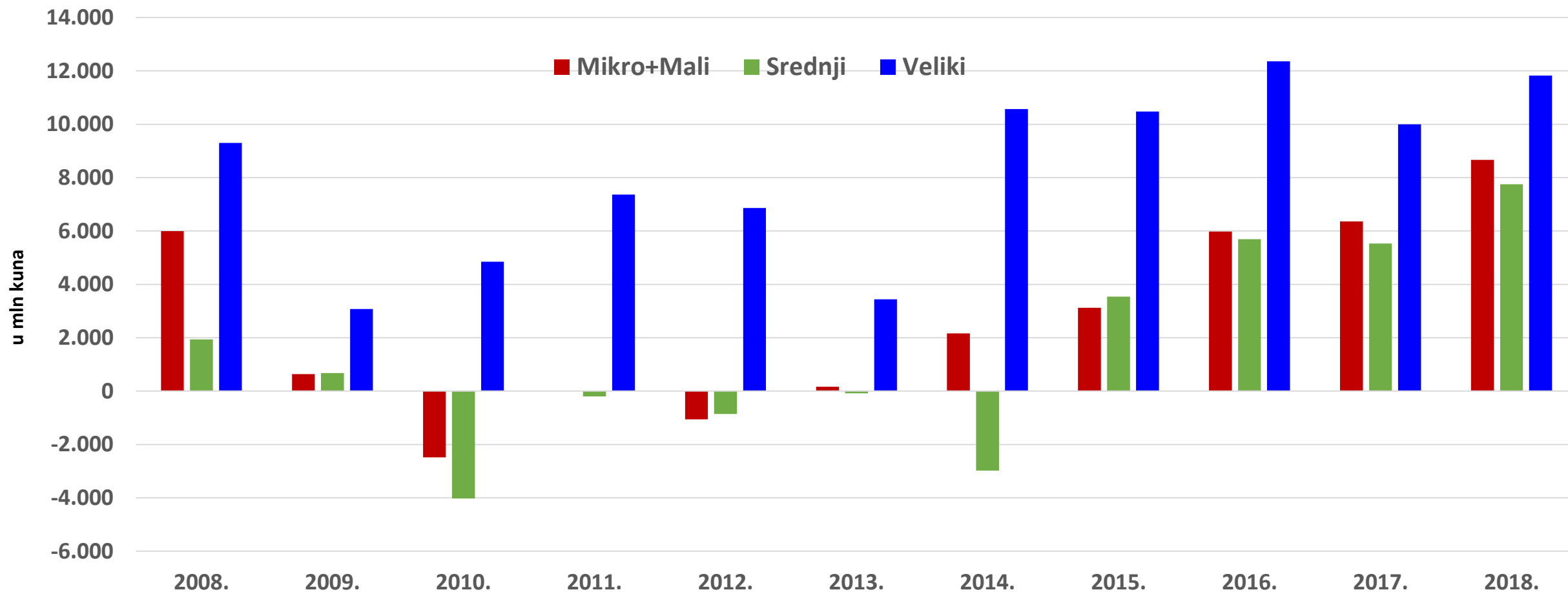
Izvor: FINA

# Izvoznici dobit/poslovni prihod

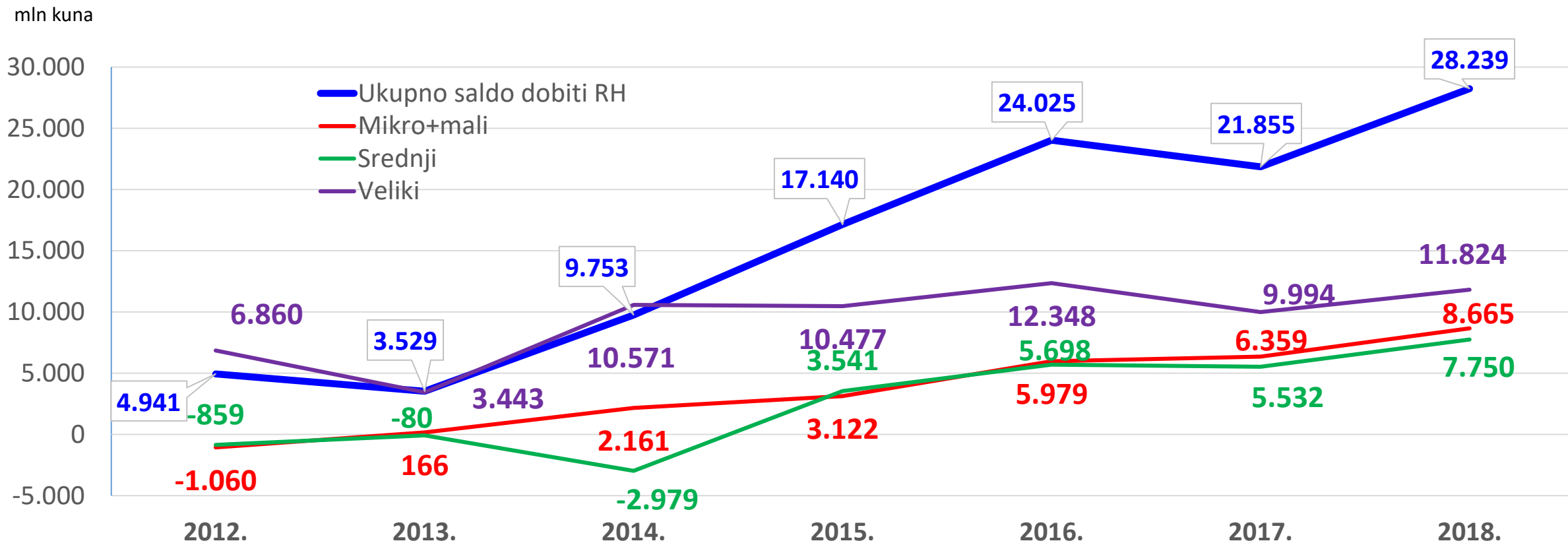


Izvor: FINA

# Dobit-gubitak (nakon poreza) RH – prema veličini poduzetnika



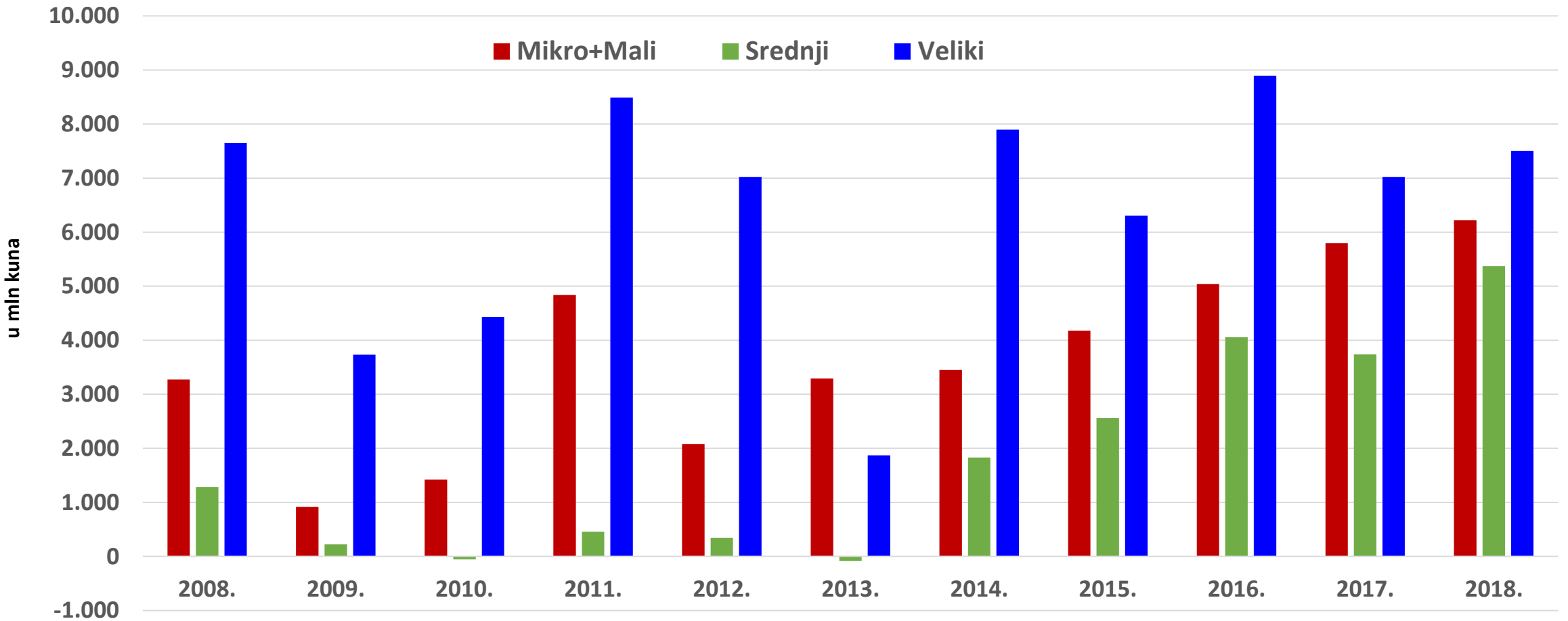
# Ukupno RH dobit



Izvor: FINA

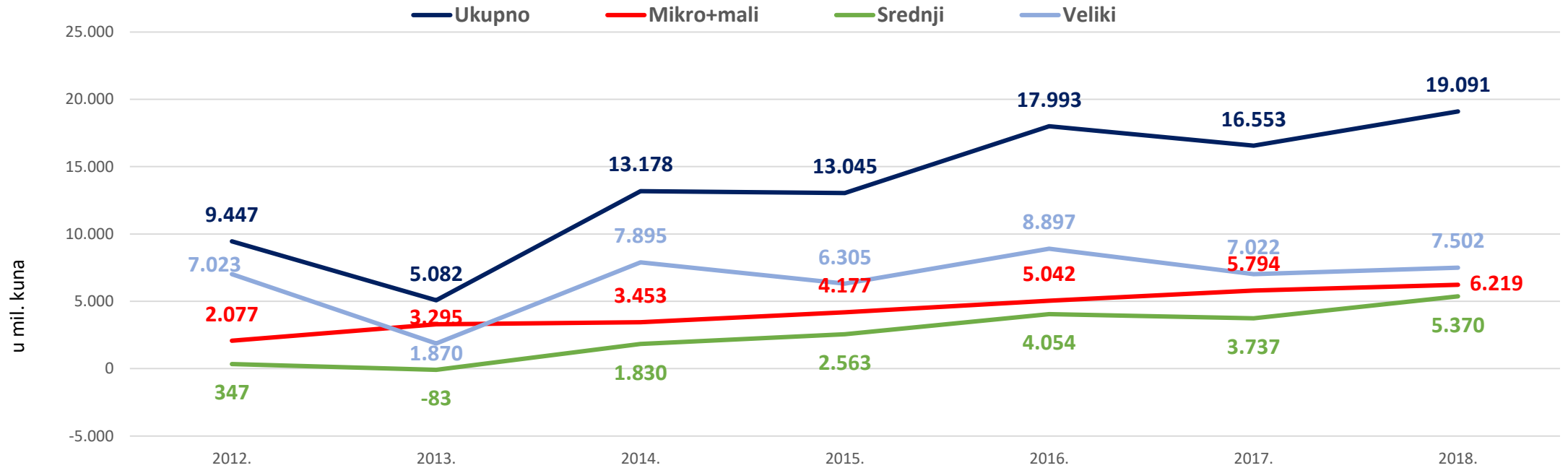
# Dobit-gubitak (nakon poreza)

## IZVOZNICI – prema veličini poduzetnika



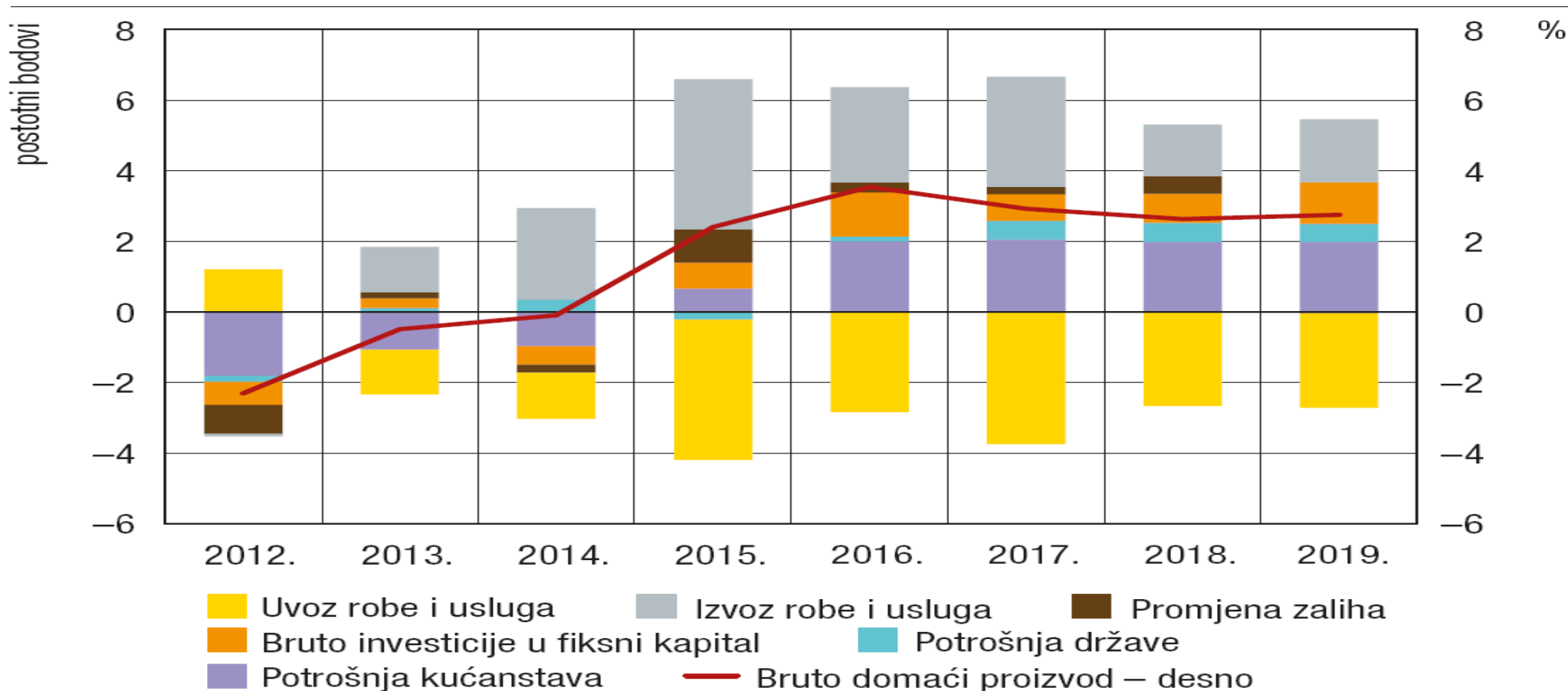


# Izvoznici dobit



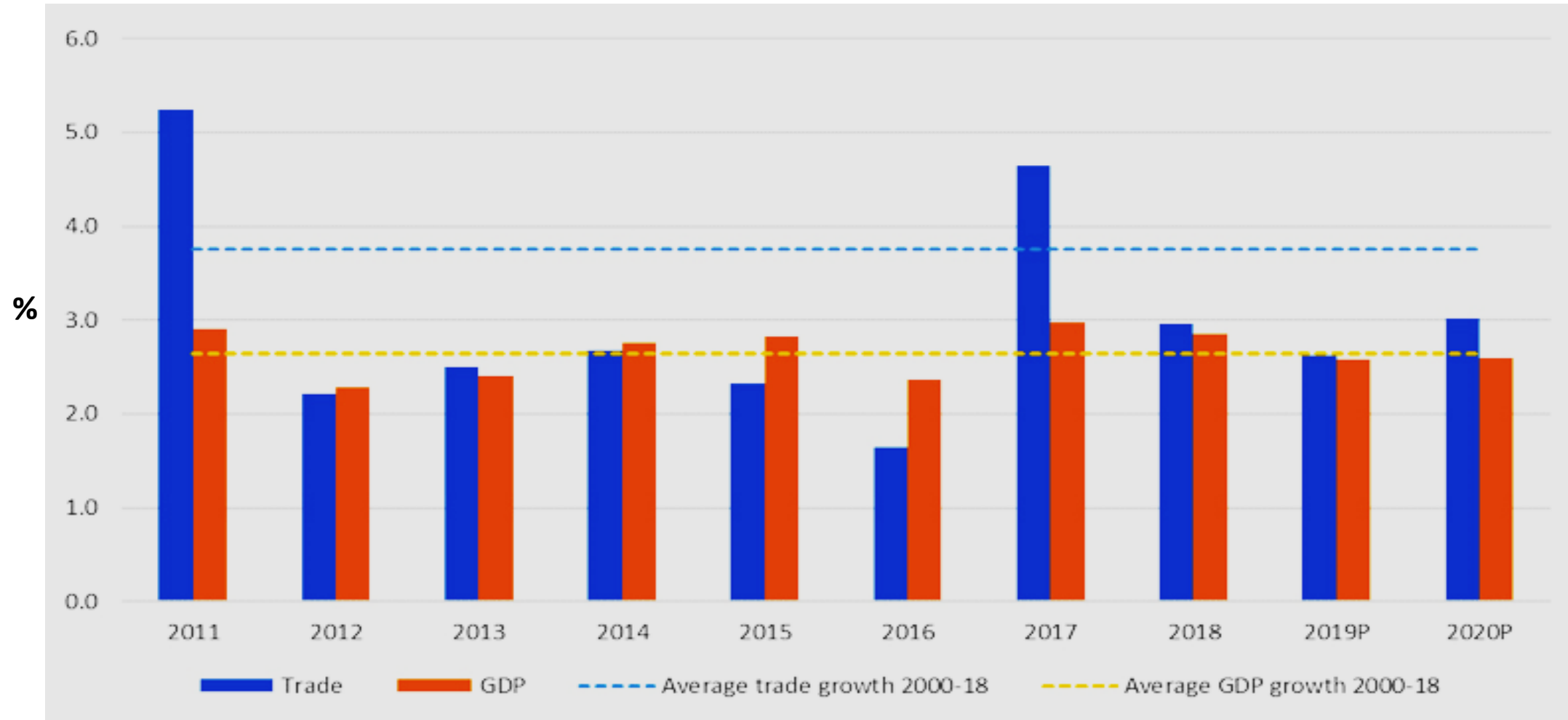
Izvor: FINA

# Promjena BDP-a RH, doprinosi po komponentama



Napomena: Projekcija za 2019. preuzeta je iz službene projekcije HNB-a iz prosinca 2018.

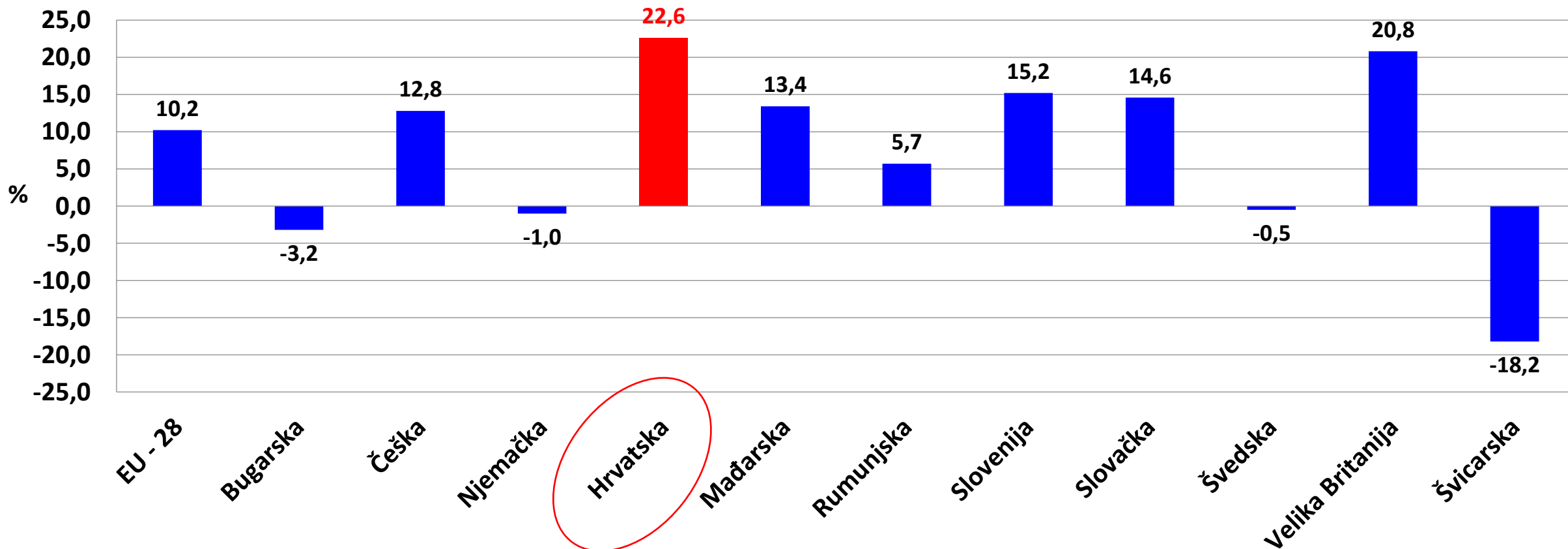
# Svjetska robna razmjena i realni rast BDP-a 2011 - 2020. godine



# Porezi na proizvode minus subvencije na proizvode izraženo u % BDP-a

zemlje/godine	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	% 2018/2009
EU - 28	10,8	11,3	11,5	11,8	11,9	11,9	11,9	11,8	11,9	11,9	10,2%
BUGARSKA	12,5	12,2	11,9	12,6	12,3	11,5	12,2	11,9	11,8	12,1	-3,2%
ČEŠKA	8,6	8,8	9,1	9,5	9,8	8,8	9,4	9,5	9,8	9,7	12,8%
NJEMAČKA	9,8	9,6	9,9	10,0	9,9	9,8	9,9	9,7	9,7	9,7	-1,0%
<b>HRVATSKA</b>	<b>14,6</b>	<b>15,1</b>	<b>14,8</b>	<b>15,9</b>	<b>16,6</b>	<b>16,6</b>	<b>17,0</b>	<b>17,3</b>	<b>17,6</b>	<b>17,9</b>	<b>22,6%</b>
MAĐARSKA	14,2	15,3	14,7	15,8	15,7	15,8	16,3	15,7	15,6	16,1	13,4%
RUMUNJSKA	8,8	10,4	11,7	11,8	11,4	11,4	11,9	10,1	9,1	9,3	5,7%
SLOVENIJA	11,2	11,7	12,5	12,9	13,2	13,4	13,6	13,4	13,1	12,9	15,2%
SLOVAČKA	8,9	8,7	9,3	8,8	9,0	9,4	9,6	9,7	10,0	10,2	14,6%
ŠVEDSKA	20,9	20,5	20,1	20,3	20,3	20,0	20,2	20,9	20,9	20,8	-0,5%
VELIKA BRITANIJA	10,1	11,5	12,1	12,0	12,1	12,2	12,2	12,2	12,3	12,2	20,8%
ŠVICARSKA	3,3	3,5	3,3	3,1	3,1	3,0	3,0	2,9	2,9	2,7	-18,2%

# Porezi na proizvode minus subvencije na proizvode izraženo u % BDP-a - (2018/2009)



terabita/sekundi

