



ITALIAN TRADE AGENCY

Ured u Zagrebu / Office of Zagreb

1. Market Analysis Objective

The objective of this research is to identify, analyze and classify the large-scale distribution chains/large retail chains/large organized distribution, retailers, e-commerce platform and strategic marketplaces in Croatia and Bosnia and Herzegovina. The analysis should highlight partnership opportunities to promote the distribution and commercialization of Italian products in the main export sectors of made in Italy.

2. Reference Sector(s)

Indicate the main sectors of Italian exports in the specific country (e.g. food, fashion, furniture, automotive, technology, etc.).

- Sector 1: _____

- Sector 2: _____

- Sector 3: _____

3. Research Methodology

Briefly describe the method used to collect data and the sources used (e.g. national statistical data, industry reports, interviews with local experts, consumer surveys, etc.).

4. Local Market Overview

This section aims to provide a comprehensive overview of the local market, exploring economic trends, competitive dynamics, and regulations relevant to the target sector. Such an overview is crucial for understanding the opportunities and challenges of the market for Made in Italy products.

4.1 Market Size

- **Total market value:** indicate the market value of the sector market and the annual growth rate in the last years.
- **(if available) Market share of Made in Italy products:** analyze the market share already held by Italian products and its trend over the last 3-5 years.
- **Growth forecasts:** provide growth projections of the sector over the next 3-5 years.

4.2 Demand for Made in Italy Products (if available)

- **Consumption trends:** examine local consumers' interest in Italian products in the reference sector. Indicate whether Italian products are perceived as premium or niche.
- **Consumer preferences:** identify the features that local consumers value most in Italian products (e.g. quality, design, authenticity, tradition) and note any potential resistance.
- **Factors influencing purchase:** highlight the motivations behind purchasing decisions for Italian products (e.g. perception of luxury, controlled origin, sustainability).
- **Italian Sounding:** provide an assessment of the the Italian Sounding phenomenon in the market and its impact on the demand for authentic Italian products.

4.3 Analysis of the composition of commercial players

- **Local and international brands:** identify the main players in the local and international market within the reference sector, specifying their market shares and strategies employed.
- **Strengths and weaknesses of the brands:** provide an analysis of the distinctive characteristics of the key players, including their positioning relative to Italian products (e.g., innovation, distribution chain, branding, target customers).

- **Characteristics of local commercial strategies:** specific information regarding the local commercial landscape, key procurement strategies, and related practices.
- **Peculiarities of local marketing strategies:** analysis of the type of promotions preferred by consumers (e.g. discounts, experiences, events, contests, etc.)
- **Current partnerships of competitors:** analyze whether other TPOs (Trade Partner Organizations) already have strategic partnerships with local large-scale distribution chains/**large retail chains**/large organized distribution or e-commerce platforms and how these partnerships impact their market share
- **Analysis of best practices by other TPOs in the specific country/sector:** i.e. strategies employed by Business France for wine/fashion sectors.

4.4 Market Trends

- **Technological innovation:** assess the impact of digitalization and new technologies on the distribution and consumption of products in the sector. Consider the adoption of e-commerce and marketplaces.
- **Sustainability:** examine the growing interest in sustainable and low-environmental- impact products and how this trend is reshaping market demand locally.
- **Demographic changes:** identify demographic trends that could influence the demand for Italian products (e.g. increased purchasing power among certain age groups or social segments).

4.5 Regulation and Barriers to Entry

- **Local regulations:** outline the regulations governing the import and distribution of Italian products, specifying any legal and technical requirements.
- **Tariff and non-tariff barriers:** analyze any tariff or non-tariff obstacles that might affect market access.
- **Incentives and concessions:** identify any local incentives or benefits aimed at facilitating the import and distribution of Italian products.

- **Corporate Social Responsibility (CSR):** assess whether there are local regulations or social expectations regarding ethical business practices, environmental responsibility and sustainability.

4.6 Opportunities and Challenges

- **Opportunities:** identify strategic opportunities for Italian companies, such as the growth of the luxury market, increased demand for premium products, or the scarcity of high-level competitors.

- **Challenges:** highlight any specific challenges that could hinder the entry or growth of Italian products, such as intense competition, high distribution costs, or difficulties in adapting products to local preferences.

5. Distribution Channel Analysis

Classify the main distribution channels (large-scale retail trade, retailers, e-commerce, marketplaces), assessing their strategic importance for Made in Italy.

5.1 Large-scale retail trade and specialized retailers

Chain name: _____

Market share: _____

Annual turnover in the last 5 years: _____

Growth in turnover in recent years: _____

Number of points of sale: _____

Current Italian products: presence of Italian products and potential for new additions (if available)

Proxy for Italian products: presence of products that could be replaced by Italian products (e.g., local luxury products, imports from other countries, etc.)

Possibility of future collaboration: growth and partnership potential

Analysis of customer target: would they potentially be interested in a selection of Italian products?

5.2 E-commerce and Marketplace

- **Platform name:** _____
- **E-commerce market share:** _____
- **Monthly visits:** _____
- **KPIs on social media pages:** _____
- **Sales volume of Italian products (if available):** _____
- **Strategic nature:** ability to promote and sell directly to the consumer (B2C) or to the retailer (B2B): _____
- **Presence of specific selections of national thematic products (Made in):** _____
- **Ability to organize trade marketing operations:** _____

6. Ranking of Potential Partners

Compile a final ranking of strategic partners, evaluating the key criteria of the previous points.

7. Conclusions

Summarize the market opportunities that emerged from the analysis and indicate the priority partners and add any considerations on further development strategies for large-scale distribution chains/large retail chains/large organized distribution and Ecommerce projects.