

In 2018 the Croatian press publishing and distribution market levelled off – paid circulation dropped

The Croatian Competition Agency (CCA) carried out its regular market investigation into the Croatian press publishing market in 2018 with the view to defining the market shares of the relevant market participants.

The market study included a total of 44 newspaper publishers and distributors. It involved the following markets: press circulation (general information dailies and weeklies), print advertising in general information dailies and weeklies and press distribution in the territory of the Republic of Croatia.

The market shares in the relevant markets were defined on the basis of paid circulation – the number of copies sold and revenues realized by the undertakings concerned in the press advertising market, wholesale and retail distribution.

The study indicated that in 2018 the press market (paid circulation and press advertising) stagnated as a result of a constant negative trend in the number of copies sold and the financial figures reflecting the market concerned.

Daily newspapers paid circulation market

There were 60.4 million copies of general information dailies sold in Croatia in 2018. In comparison with the preceding year this was a fall by 9 %. All the dailies recorded the circulation fall.

Like in the last four years, the daily “24sata” had the highest circulation in 2018. Its market share was between 30 % and 40 %. However, with the falling circulation trend. The market leader was followed by the “Jutarnji list” (Hanza Media Group) holding a market share of 20 % to 30 %, but also with the fall of the circulation compared with 2017. The third place on the circulation list was taken by the “Večernji list” whose market share was between 10 % and 20 % but falling.

Worth mentioning was the paid circulation of the “Slobodna Dalmacija” (Hanza Media Group) and the “Novi list” (Glas Istre), that are both regional dailies and both recorded a circulation shrinkage compared with 2017. Their market shares were 10 % to 20 % and 5% to 10 %, respectively.

The ownership structure reveals that the highest share of some 50 % to 60 % in the general information daily newspapers market in 2018 was held by Styria AG (“24sata” and “Večernji list”) although its market share slightly dropped compared with the previous year.

The market share of Hanza Media Group (“Jutarnji list”, “Slobodna Dalmacija”) was 30 % to 40 % in the general information daily newspapers market in 2018 and thereby indicated a slight increase in the market share. It must be noted that on 1 April 2019 due to internal restructuring within the group Slobodna Dalmacija d.d. was acquired by Hanza Meida d.o.o.

The newspapers publishing group Glas Istre (“Novi list”, “Glas Istre” and “Zadarski list”) held a combined market share of some 10 % to 20 % in 2018. In July 2018 JOJ Media House a.s. from Bratislava acquired the controlling interest over the undertakings Novi list from Rijeka, Glas Istre from Pula and RTD from Zadar – the publishers of the newspapers concerned.

Weeklies paid circulation market

The paid circulation of the general information weeklies in Croatia in 2018 dropped by 5 % in comparison with 2017. The majority of the regional weeklies followed the general negative trend except "Hrvatski tjednik", "Varaždinske vijesti", "Nacional", "Posavska Hrvatska" and "Glas Podravine i Prigorja".

"7Dnevno" published by Eurocinik had the highest although falling circulation, the second place was held by the weekly "Međimurje" whereas "Hrvatski tjednik" (former "Hrvatski list") occupied the third place.

Print advertising market – dailies and weeklies

The total revenue that the publishers made from advertising in the daily papers in 2018 was 156 million Kuna or 4.3 million Kuna less than in the previous year. Most publishers indicated a slight downward trend in the advertising revenues.

The highest market share of some 20 % - 30 % was held in 2018 by the publisher of the "Jutarnji list" Hanza Media, indicating a slight downfall in the advertising revenues compared with 2017. It was followed by Slobodna Dalmacija with 10 % - 20 % market share and Novi list with also 10% to 20% market share. The publisher of the "Slobodna Dalmacija" Hanza Media Group, taking the second lead, indicated a slight fall in the advertising revenue, whereas Novi list, taking the third place, indicated a slight revenue rise. The publisher of the "Večernji list" Večernji list, the fourth on the list, held a 10% to 20% market share indicating a minor fall in the advertising revenue compared with 2017. The market share of the fifth rival publisher of the daily "24 sata" was 10 % to 20 % with a moderate rise ad generated revenue.

The individual market shares of the remaining four publishers (Glas Slavonije, Glas Istre, Zadarski list and La Voce del Popolo) in 2018 were lower than 10 %.

The ad generated revenue of the general information weekly publishers in 2018 was 26.8 million Kuna, which is a rise by some 1.8 million Kuna or 7 % compared with 2017.

The highest individual market share of some 10 % to 20 % was held by the publisher of Dubrovački vjesnik, Dubrovački vjesnik d.o.o. within the Hanza Media Group that remained the leader both in 2017, when its market share was also some 10 % to 20%, and in the reporting 2018. The combined market share of Hanza Media Group, the publisher of Dubrovački vjesnik and Globus, in the relevant market in 2018 was 20 % to 30 %.

Press distribution market - wholesale and retail

There has been only one player present in the wholesale press distribution market at the national level in 2018 – the undertaking Tisak d.d. from Zagreb that in 2018 experienced a minor revenue fall in comparison with 2017. In the retail press distribution market Tisak d.d. on its 967 points of sale experienced a slight revenue fall compared with the previous year but remained the leader. It must be noted that on 1 April 2019 Tisak plus d.o.o. took over the business, the rights and obligations of the undertaking Tisak d.d.

In other words, in 2018 Tisak was also the leader in the retail press distribution. The second rival was Hanza Media with a slight rise in the revenue, whereas the third place was taken by the publisher Večernji list who also recorded a slight rise in the revenue.

With respect to its press retail revenue Inovine was on place four in 2018. As a specialized press and tobacco products retailer it owns 287 outlets, which makes it the second rival of Tisak. Compared with the previous year its press retail revenue slightly decreased. Its outlets are dispersed all over the territory of Croatia, however, it owned 3.5 times less points of sale than Inovine.

The press distributor Fibis also had a minor fall in the press retail revenue compared with 2017. Although it owns a network of specialized outlets their number is negligible in comparison with Tisak or Inovine and they are mostly located regionally.

The total press retail revenue in Croatia in 2018 decreased compared with 2017. Tisak and Inovine that own the largest number of specialized retail outlets recorded a decrease in their revenues whereas the highest increase from the activity concerned was recorded by Hanza Media and 24sata. In 2018 the recorded revenues ensured these publishers the positions in the market that they held in 2017 – Hanza Media the second, and 24sata the fifth.

Three publishers out of seven in total – Hanza Media, Večernji list and 24sata – that played the leading roles based on the circulation in the segment of general information dailies in 2018, as the most circulated papers, increased their press retail revenues through subscriptions. Yet, the subscriptions-based circulation still does not make a significant share in the total of all market segments in the press distribution chain.

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