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INDUSTRIAL TURNOVER INDEX, NOVEMBER 2025

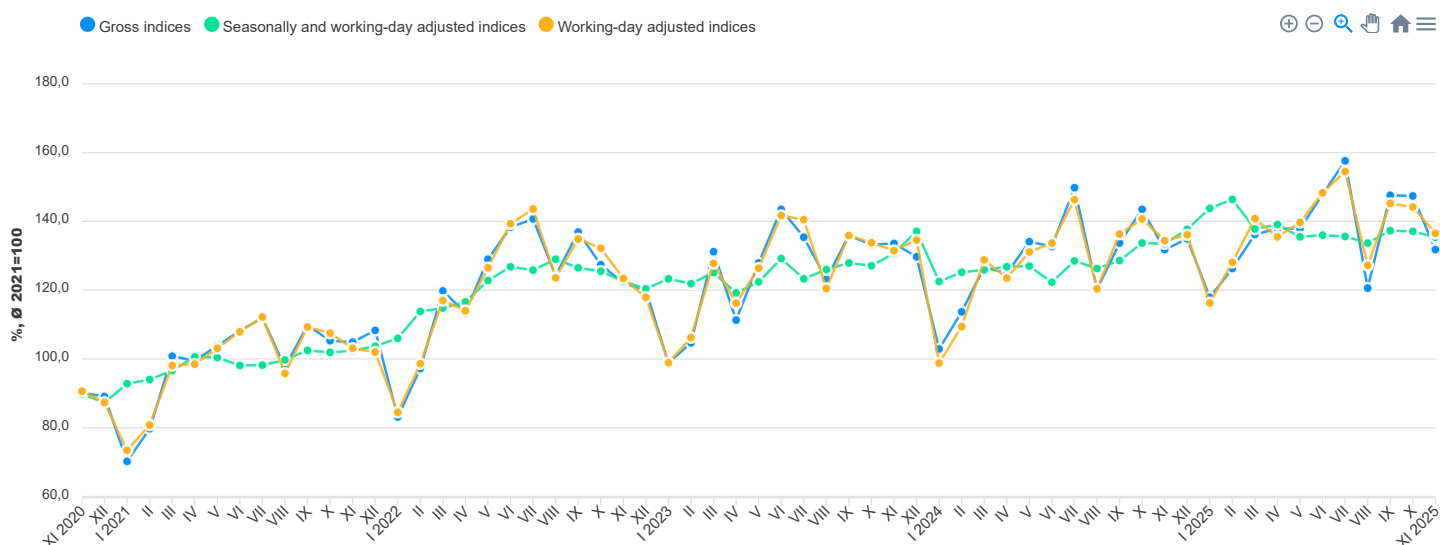
The total seasonally and working-day adjusted **industrial turnover**¹⁾ in the Republic of Croatia in November 2025, as compared to October 2025, decreased by **1.2%**. If compared by the destination of markets, then in the same period it increased by 0.2% on the domestic market and decreased by 6.2% on the non-domestic market.

The total working-day adjusted industrial turnover²⁾ in the Republic of Croatia in November 2025, as compared to November 2024, increased by **1.6%**. If compared by the destination of markets, then in the same period it increased by 6.5% on the domestic market, whereas it decreased by 6.9% on the non-domestic market.

1) Data compared to those of the previous month (the so-called month-on-month comparison according to Eurostat's terminology and practice) for industrial turnover are seasonally and working-day adjusted data, in line with the Regulation (EU) 2019/2152 of the European Parliament and of the Council of 27 November 2019 on European business statistics, repealing 10 legal acts in the field of business statistics and the Commission Implementing Regulation (EU) 2020/1197 of 30 July 2020 laying down technical specifications and arrangements pursuant to Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics repealing 10 legal acts in the field of business statistics.

2) Data compared to those of the same month of the previous year (the so-called year-on-year comparison according to Eurostat's terminology and practice) are, for industrial turnover, working-day adjusted data.

G-1 INDUSTRIAL TURNOVER INDEX OF THE REPUBLIC OF CROATIA, NOVEMBER 2020 – NOVEMBER 2025



MONTHLY COMPARISON, ACCORDING TO MIGs 2009 – Seasonally and working-day adjusted indices

In November 2025, as compared to October 2025, the total turnover of Intermediate goods decreased by 5.9%, of Non-durable consumer goods by 5.7%, and of Durable consumer goods by 3.5%, whereas the total turnover of Energy increased by 6.8%, and of Capital goods by 2.7%.

ANNUAL COMPARISON, ACCORDING TO MIGs 2009 – Working-day adjusted indices

In November 2025, as compared to November 2024, the total turnover of Intermediate goods increased by 4.5%, of Non-durable consumer goods by 2.0%, of Durable consumer goods by 0.6%, and of Capital goods by 0.6%, whereas the total turnover of Energy decreased by 14.6%.

1.1 INDUSTRIAL TURNOVER – MONTH-ON-MONTH GROWTH RATES CALCULATED ON BASIS OF SEASONALLY AND WORKING-DAY ADJUSTED INDICES

	<u>VI 2025</u> V 2025	<u>VII 2025</u> VI 2025	<u>VIII 2025</u> VII 2025	<u>IX 2025</u> VIII 2025	<u>X 2025</u> IX 2025	<u>XI 2025</u> X 2025
Total industry	0,4	-0,3	-1,4	2,7	-0,2	-1,2
According to MIGs 2009						
AI Intermediate goods	4,2	0,9	-3,2	4,2	2,9	-5,9
AE Energy	-25,6	-17,3	-9,8	13,5	35,5	6,8
BB Capital goods	-3,3	3,6	-1,1	-0,2	-7,9	2,7
CD Durable consumer goods	0,6	-3,3	4,3	6,9	-4,8	-3,5
CN Non-durable consumer goods	6,6	-0,5	-4,6	9,3	-2,6	-5,7
According to markets						
Domestic industrial turnover	0,2	-2,2	0,7	3,5	-0,2	0,2
Non-domestic industrial turnover	3,1	2,9	-10,0	7,5	-0,5	-6,2

1.2 INDUSTRIAL TURNOVER – YEAR-ON-YEAR GROWTH RATES CALCULATED ON BASIS OF WORKING-DAY ADJUSTED INDICES

	<u>VI 2025</u> VI 2024	<u>VII 2025</u> VII 2024	<u>VIII 2025</u> VIII 2024	<u>IX 2025</u> IX 2024	<u>X 2025</u> X 2024	<u>XI 2025</u> XI 2024	<u>I – XI 2025</u> I – XI 2024
Total industry	10,9	5,6	5,7	6,6	2,4	1,6	8,0
According to MIGs 2009							
AI Intermediate goods	13,2	8,4	8,5	11,1	5,8	4,5	8,1
AE Energy	5,4	-15,7	-17,4	-5,1	-3,7	-14,6	38,7
BB Capital goods	4,4	7,8	10,1	10,2	-5,0	0,6	3,7
CD Durable consumer goods	-2,5	-7,2	0,4	-28,0	4,2	0,6	-3,7
CN Non-durable consumer goods	12,0	5,4	-0,4	10,8	4,9	2,0	5,3
According to markets							
Domestic industrial turnover	11,4	3,7	6,0	8,9	5,8	6,5	8,5
Non-domestic industrial turnover	12,5	6,4	-1,2	6,3	-1,5	-6,9	6,2

1.3 INDUSTRIAL TURNOVER – GROSS (UNADJUSTED) INDICES, TOTAL AND ACCORDING TO MIGs 2009, NOVEMBER 2025

	Structure	<u>XI 2025</u> Ø 2024	<u>XI 2025</u> XI 2024	<u>I – XI 2025</u> I – XI 2024
Total industry	100,00	102,1	99,9	106,8
According to MIGs 2009				
AI Intermediate goods	35,68	106,6	103,4	107,1
AE Energy	8,74	118,3	85,4	138,8
BB Capital goods	19,20	103,5	97,9	102,4
CD Durable consumer goods	2,88	100,7	99,4	96,1
CN Non-durable consumer goods	33,50	94,9	100,7	105,0
According to markets				
Domestic industrial turnover	60,96	103,3	104,8	107,5
Non-domestic industrial turnover	39,04	100,2	93,1	105,7

I ANNEX – INDUSTRIAL TURNOVER INDICES – TIME SERIES

1 TOTAL INDUSTRY AND ACCORDING TO MIGs 2009 – GROSS AND WORKING-DAY ADJUSTED INDICES

Ø 2021 = 100

	Gross indices						Working-day adjusted indices					
	Total	Intermediate goods	Energy	Capital goods	Durable consumer goods	Non-durable consumer goods	Total	Intermediate goods	Energy	Capital goods	Durable consumer goods	Non-durable consumer goods
2023												
XI	133,6	128,8	143,6	144,8	125,7	131,2	131,5	126,9	143,6	142,5	124,6	129,8
XII	129,7	115,2	81,0	173,7	128,1	128,7	134,6	118,5	81,0	179,3	129,9	130,9
2024												
I	102,9	104,0	36,5	105,8	96,3	111,8	98,8	100,9	36,5	103,3	93,6	110,0
II	113,7	130,3	30,5	115,5	104,3	109,9	109,4	126,5	30,5	105,5	105,5	108,2
III	126,7	134,3	20,0	128,8	118,0	136,3	128,8	138,3	20,0	133,0	119,2	138,7
IV	124,9	137,2	20,9	129,7	112,6	128,0	123,5	134,1	20,9	127,7	112,9	127,2
V	134,1	134,4	104,8	131,2	120,9	141,3	131,1	132,4	104,8	128,1	118,4	139,3
VI	132,7	126,8	138,9	125,2	113,2	143,7	133,7	127,0	138,9	130,3	113,9	146,7
VII	149,8	138,9	176,2	136,9	117,4	166,7	146,3	137,2	176,2	133,6	115,7	164,1
VIII	120,2	100,2	174,6	100,7	83,8	146,1	120,4	100,3	174,6	101,1	83,1	147,0
IX	133,7	130,2	153,9	123,0	163,8	137,6	136,3	132,1	153,9	124,5	166,2	138,5
X	143,5	148,9	168,4	140,9	118,1	136,9	140,7	146,9	168,4	137,6	116,5	135,0
XI	131,8	132,3	152,5	134,9	116,2	127,2	134,4	133,9	152,5	136,5	117,3	128,2
XII	134,9	122,4	143,5	158,3	111,1	135,0	136,1	124,1	143,5	158,9	114,9	135,5
2025												
I	117,9	120,9	182,4	98,2	100,4	116,6	116,3	119,1	182,4	95,9	98,6	114,9
II	126,3	134,0	161,0	121,2	105,5	117,1	128,1	135,1	161,0	124,6	105,1	117,7
III	136,2	143,4	134,0	126,8	119,3	136,0	140,8	144,4	134,0	130,9	122,2	138,4
IV	137,9	139,9	137,6	127,0	117,7	143,8	135,5	140,7	137,6	125,0	116,7	142,0
V	137,9	139,4	140,5	137,7	111,5	138,0	139,7	140,3	140,5	138,3	111,9	138,9
VI	147,8	143,1	146,4	134,4	110,4	163,2	148,3	143,8	146,4	136,0	111,0	164,3
VII	157,6	150,8	148,6	147,5	109,0	175,5	154,5	148,8	148,6	144,0	107,4	173,1
VIII	120,6	104,2	144,1	107,8	79,8	143,9	127,2	108,9	144,1	111,3	83,4	146,4
IX	147,6	147,9	145,9	139,3	119,9	154,4	145,2	146,7	145,9	137,1	119,7	153,5
X	147,4	157,8	162,2	133,9	124,8	143,7	144,2	155,4	162,2	130,8	121,4	141,6
XI	131,8	136,8	130,2	132,0	115,4	128,1	136,5	139,9	130,2	137,4	118,0	130,8

2 INDUSTRIAL TURNOVER INDICES, TOTAL AND ACCORDING TO MIGs 2009 – SEASONALLY AND WORKING-DAY ADJUSTED INDICES AND TREND

Ø 2021 = 100

	Seasonally and working-day adjusted indices						Trend					
	Total	Intermediate goods	Energy	Capital goods	Durable consumer goods	Non-durable consumer goods	Total	Intermediate goods	Energy	Capital goods	Durable consumer goods	Non-durable consumer goods
2023												
XI	130,7	124,7	142,0	131,6	115,2	136,2	128,5	124,2	136,5	129,9	116,3	133,6
XII	137,1	126,7	125,4	143,9	122,4	133,3	128,3	125,3	121,7	130,1	113,8	133,9
2024												
I	122,5	118,8	87,4	133,1	103,2	133,6	127,7	126,0	105,9	130,1	112,0	133,9
II	125,2	127,5	93,6	113,7	110,9	130,1	126,9	126,3	93,0	129,8	110,8	134,0
III	125,9	125,3	87,0	129,4	110,9	136,4	126,4	126,3	87,2	129,3	111,1	134,2
IV	126,8	128,3	74,3	130,8	111,4	134,4	126,0	126,2	87,4	128,7	112,5	134,6
V	127,0	125,2	102,9	126,8	115,9	135,4	126,0	126,0	91,0	128,0	113,9	135,1
VI	122,3	122,9	96,1	127,0	112,7	128,8	126,3	126,1	95,3	127,3	114,0	135,6
VII	128,5	130,7	112,3	127,6	113,7	136,2	126,9	126,5	99,3	126,7	112,7	135,8
VIII	126,3	126,1	107,6	123,1	110,1	137,0	128,0	127,3	105,3	126,3	110,6	135,9
IX	128,6	127,3	95,6	122,8	165,0	134,5	129,9	128,6	116,9	126,1	109,1	136,1
X	133,7	138,0	127,7	131,2	108,0	139,0	132,3	130,2	135,0	126,2	107,9	136,6
XI	133,5	131,6	151,2	126,7	107,9	134,4	135,1	131,8	159,0	126,6	107,5	137,2
XII	137,7	132,2	185,4	126,9	106,8	137,9	137,5	132,9	184,3	127,2	107,6	137,9
2025												
I	143,8	137,0	231,7	123,7	109,2	139,5	139,1	133,6	203,3	128,1	108,8	138,9
II	146,4	135,2	221,7	134,7	110,5	141,9	139,7	134,2	209,6	129,2	111,3	140,0
III	137,8	132,2	199,4	128,2	113,8	136,4	139,3	134,6	199,8	130,5	113,2	141,0
IV	139,1	134,5	192,1	128,1	114,8	149,7	138,3	135,2	176,4	131,8	113,1	141,8
V	135,5	134,0	141,0	136,8	109,1	135,1	137,1	136,0	146,4	133,0	110,9	142,2
VI	136,0	139,6	104,9	132,4	109,8	144,1	135,7	137,0	117,2	134,1	108,6	142,3
VII	135,6	140,8	86,7	137,1	106,2	143,3	134,7	138,2	96,1	135,0	108,2	142,3
VIII	133,7	136,3	78,2	135,5	110,7	136,7	134,0	139,2	86,2	135,5	109,4	142,2
IX	137,3	142,0	88,8	135,2	118,3	149,3	1)	1)	1)	1)	1)	1)
X	137,1	146,1	120,3	124,5	112,6	145,4	1)	1)	1)	1)	1)	1)
XI	135,4	137,5	128,5	127,8	108,6	137,1	1)	1)	1)	1)	1)	1)

1) Time series of trend indices are released with each revision of seasonally adjusted data.

NOTES ON METHODOLOGY

Data on the industrial turnover index on a month-on-month and year-on-year chain basis and on the fixed base year 2021 = 100 are presented in line with the Regulation (EU) 2019/2152 of the European Parliament and of the Council of 27 November 2019 on European business statistics, repealing 10 legal acts in the field of business statistics.

Short-term business indicators of industry (the industrial production index and the industrial turnover index) can serve as development indicators for the market of industrial products and services produced within industry.

Additionally, industrial turnover indices on the **domestic market** serve to measure monthly movements in industrial turnover/production sold realised by industrial enterprises/industrial local units on the territory of the Republic of Croatia, while on the other hand, industrial turnover indices on the **non-domestic market** serve to measure monthly movements in industrial turnover/production sold realised by industrial enterprises/industrial local units on the non-domestic market, that is, outside the territory of the Republic of Croatia.

Legal and methodological framework

The Monthly Survey on Industrial Turnover (IND-2/KPS/M form) is carried out in 2025 by the Croatian Bureau of Statistics on the basis of the Official Statistics Act (NN, Nos 25/20, 155/23 and 124/25 – corr.).

Concepts and definitions used in the IND-2/KPS/M Survey are harmonised with the EU concepts and definitions, and especially with the underlying Regulation (EU) 2019/2152 of the European Parliament and of the Council of 27 November 2019 on European business statistics, repealing 10 legal acts in the field of business statistics and the Commission Implementing Regulation (EU) 2020/1197 of 30 July 2020 laying down technical specifications and arrangements pursuant to Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics repealing 10 legal acts in the field of business statistics regarding definitions of variables, list of variables and frequency of data compilation.

Scope and coverage

The IND-2/KPS/M Survey covers all enterprises and parts thereof employing 20 or more persons and performing one or several industrial activities by definitions of activity coverage of the NKD 2007¹⁾ (NN, Nos 58/07 and 72/07) for each indicator separately due to the differences in coverage according to the legislation of the EU.

Industrial turnover index covers only two industrial sections of the NKD 2007, that is, sections B Mining and quarrying and C Manufacturing, and their divisions 05 – 33. The IND-2/KPS/M Survey for 2025 covers 3 259 enterprises (legal entities and tradesmen). In November 2025, the response rate was 98.0%, while the estimation of non-response rate was 2.0%.

1) The Decision on the National Classification of Activities 2007 – NKD 2007 will be used in the IND-2/KPS/M Survey until 31 December 2027 in accordance with the transitional provision from Article 6 of the Decision on the National Classification of Activities 2025 – NKD 2025 (NN, No. 47/24).

Reference period

In 2025, a combined method of using two data sources is used to collect data: an administrative source (98.1% of units) and a statistical source in the way that data are collected directly from reporting units (1.9% of units), mostly from large enterprises where the reporting method via a web-based application (the so-called CAWI) is applied, i.e. reporting units fill in data directly in the IND-2/KPS/M e-form, which is available on the website of the Croatian Bureau of Statistics: <https://podaci.dzs.hr/hr/obrasci/industrija/>. The time schedule for data collection for the reporting units is between 1st and 15th day in a month for data from the previous reference month. Data on reporting units that are taken over from the administrative source (VAT) are collected 45 days after a reference month, at which point they are available to the Tax Administration and further processed at the Croatian Bureau of Statistics for statistical purposes.

Definitions of indicators

Industrial turnover indices are chain indices calculated according to value data of the industrial turnover/sales at the level of main activity of industrial local units defined by the Croatian Bureau of Statistics.

The indices were calculated from aggregate data on the value of industrial turnover/sales in the reporting month.

Calculation method

Industrial turnover indices for different levels of the NKD 2007 are calculated for indices at the group level and higher by weighting with the share in the value of turnover (sales) for defined industrial activities according to the NKD 2007 in respect with each indicator. Indices for MIGs 2009 aggregates²⁾ are calculated in the same way as well as indices for domestic and non-domestic market. They are presented below.

2) The Commission Implementing Regulation (EU) 2020/1197 of 30 July 2020 laying down technical specifications and arrangements pursuant to Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics repealing 10 legal acts in the field of business statistics, as regards the definitions of Main Industrial Groupings (MIGs).

Industrial turnover

The value of total industrial turnover, that is, income from sales is the invoiced value of reporting local industrial units for the products and services sold during the reference month. It corresponds to the market value of goods and services sold and delivered to third parties on domestic and non-domestic market.

The value of income from sales (turnover) in industry includes all transport and packing costs as well as taxes on invoiced goods and services of the reporting units, except the value added tax (VAT). Excluded are all reductions in prices, rebates and discounts as well as the value of returned packed industrial goods, except cash price reductions. Price reductions, rebates and bonuses granted to customers later (e.g. at the end of the year) are also excluded.

The value of turnover on domestic and non-domestic market

The income from the sales (turnover) of products and services to third parties residing in the same country, that is, to residents of the Republic of Croatia, is considered sale on the domestic market, while the income from sales on the non-domestic market is considered sales to non-residents of the Republic of Croatia according to the criterion of the first destination of products or services and change of ownership (irrespective of whether the goods or services for which the invoice was issued actually crossed the border or not). The income from sales on the non-domestic market is additionally stated according to the euro area criterion, depending on whether the country is in or out of the euro area.

Data release

Data on total industrial turnover indices, on domestic and non-domestic market, are released at the level of the total industry, according to the NKD 2007 sections and according to the MIGs 2009 aggregates grouped according to sections and divisions of the NKD 2007. Data on total industrial turnover indices on the non-domestic market, broken down to those within and outside the euro area, are released at the level of the total industry, according to the NKD 2007 sections and according to MIGs 2009 aggregates, at the constant base 2021 = 100, in the STS database <https://stsbaza.dzs.hr/en>.

MIGs 2009 aggregates

The calculation of the MIGs 2009 aggregates was done by grouping of the NKD 2007 activities at the level of groups or divisions within sections B and C (05.1 – 33.2), using alphabetic marks of abbreviations as follows:

AI	Intermediate goods: the NKD 2007 divisions and groups: 07 – 09, 10.6, 10.9, 13.1 – 13.3, 16, 17, 20.1 – 20.3, 20.5, 20.6, 22 – 24, 25.5 – 25.7, 25.9, 26.1, 26.8, 27.1 – 27.4 and 27.9
AE	Energy: the NKD 2007 divisions: 05, 06 and 19
BB	Capital goods: the NKD 2007 divisions and groups: 25.1 – 25.4, 26.2, 26.3, 26.5, 26.6, 28, 29, 30.1 – 30.4, 32.5 and 33
CD	Consumer durables: the NKD 2007 divisions and groups: 26.4, 26.7, 27.5, 30.9, 31, 32.1 and 32.2
CN	Consumer non-durables: the NKD 2007 divisions and groups: 10.1 – 10.5, 10.7, 10.8, 11, 12, 13.9, 14, 15, 18, 20.4, 21, 32.3, 32.4 and 32.9.

Activity structure according to the NKD 2007

The structure of industrial activities (division structure) has been calculated for the industrial turnover index on the basis of the value of industrial sales (turnover) by using the pure activity principle for the Republic of Croatia in 2023. It was calculated on the basis of the 2023 annual statistical results of the Structural Business Survey carried out by the Croatian Bureau of Statistics and by processing annual administrative data taken over from Fina – the Annual Accounts of Industrial Enterprises in 2023, after which it was corrected by using the results of the PRODCOM Survey on Industrial Production for 2023. For the calculation of domestic and non-domestic market indices, the structure calculated on the basis of the PRODCOM Survey on Industrial Production for 2023 is used. The division structure is updated at the beginning of every year for the calculation of indices of the current year.

Index series presentation

Seasonal and working-day adjustment has been done by using the X13 ARIMA method on the monthly index series, which starts with the January 2000 index for total industry and MIGs 2009 according to specific groupings in relation to the NKD 2007 activity coverage for each of the indicators. The effect of a random component in the seasonal adjustment of index time series has been excluded.

Due to the character of the implemented seasonal adjustment method, the extension of the index series by adding new monthly observations for each new month could cause subsequent corrections of the already published seasonally and working-day adjusted indices and trend for several previous months.

Seasonally and working-day adjusted indices

The term "seasonally and working-day adjusted" indices is used to indicate that gross indices are adjusted for both seasonal and working-day effects, in line with Eurostat's requirements for short-term business indicators. The data that are compared to those of the previous month (that is, month-on month comparison) are presented in a seasonally and working-day adjusted form of industrial turnover indices or growth rates calculated from them.

Working-day adjusted indices

The term "working-day adjusted indices" is used to indicate that gross indices are adjusted only for working-day effects in line with Eurostat's requirements for short-term business indicators. The data that are compared to those of the same month of a previous year (that is, year-on-year comparison) are presented in a working-day adjusted form of industrial turnover indices or growth rates calculated from them.

Notice

The Croatian Bureau of Statistics has changed the package and the method of seasonal adjustment of the time series of industrial turnover indices and other short-term indicators. Up until now, the TRAMO-SEATS method was used in the Demetra (version 2.2) package. Since January 2016, the new X13 ARIMA method in the new JDemetra+ (version 2.0.0 or newer versions after they have been officially available) package has been used. Due to this, there has been a change in the already published seasonally and working-day adjusted values and corresponding change rates in the entire time series.

Abbreviations

CAWI	computer-assisted web interviewing
EU	European Union
Eurostat	Statistical Office of the European Union
MIGs 2009	Main Industrial Groupings, 2009 version
NKD 2007	National Classification of Activities, 2007 version
NKD 2025	National Classification of Activities, 2025 version
NN	Narodne novine, official gazette of the Republic of Croatia
PRODCOM	PRODucts of the European COMMunity



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