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Czech Republic

Exporter Guide

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Approved by:
Paul Spencer-MacGregor
U.S. Embassy
Prepared by:
Petra Choteborská

Report Highlights: Czech consumers are becoming more segmented and the retail food sector continues to consolidate. Tourism is also becoming more important and hotels and restaurants are demanding higher quality foods and services. Regulatory requirements are being revised to meet European standards as part of the Czech Republic's bid for EU membership. U.S. almonds, snack foods, bourbon, and seafood products show good market potential.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Vienna [AU1], EZ

SECTION I. MARKET OVERVIEW

Economic Situation

The Czech economy is improving compared to the last few years. Gross domestic product started to grow last year and this year's economic growth is expected to be between 1.5 - 3%. Capital investment in industry and manufacturing grew 9.2% and this is one factor behind the overall GDP growth acceleration. Households are spending more money (especially on food - a 6.9% increase over last year), rent, utilities, and vacations. Due to higher fuel prices, people are cutting back on travel. Economic growth is expected to continue over the next few years unfinished structural reforms that remain as part of the country's decade old transition to a full market economy; namely, privatization, judicial reform, modernization of the commercial code, and enhanced transparency in the government's economic decision-making.

	1997	1998	1999	2000 (est.)
GDP (in bill. $, current prices)	40.42	55.00	54.00	N/A
Real GDP growth rate (in %)	1.0	2.7	-1.0	2.0
GDP per capita (in $)	3925	5500	5500	N/A
State budget/GDP (in %)	30	29	32	N/A
Inflation (in %)	8.5	10.7	5.0	3.8
Unemployment (in %)	5.2	7.5	10.0	9.6
Exchange rate to $1 (in CZK)	31.71	32.27	35.47	39.8

Source: Czech National Bank, Ministry of Finance

The Czech Role in the Region's Economy

The Czech Republic's central location makes it an excellent hub for transshipment to other member states of the Central European Free Trade Agreement[1], Russia, the NIS and the European Union (EU). Integrating the Czech economy into the West, specifically into the EU, remains a government priority. The Czech Republic began negotiations on EU accession in March 1998 and has set a target of 2003 to be prepared for EU entry. In practice, this means harmonizing Czech laws and standards with those of the EU. In the meantime, the Czech Republic benefits from access to EU markets under an Association Agreement with the EU.

Upgrading the nation's infrastructure, especially telecommunications and transportation, is critical for continued economic growth and development. The quality of the Czech transportation network is generally below western European standards and all of the transport sectors, including railway, highway, inland waterway and air, are being upgraded. Projects currently include a $3.5

[1] Czech Republic, Hungary, Poland, Slovakia, Slovenia, Bulgaria and Romania

billion modernization of the rail system (with priority being giving to the Czech section of the Berlin-Prague-Vienna line); a plan to modernize and extend the country's highway network; and plans to expand the use of the river transport system for containerized cargo.

The effects of the economic situation on sales of U.S. products

Due to unfavorable economic conditions in the last few years, demand for luxury products has been low and price still remains the single most important purchasing factor. However, there is a niche market for some high quality U.S. products, which are listed in Section IV.

On a cumulative basis, the United States is the third largest investor in the Czech Republic, behind Germany and the Netherlands. Among the American food companies that have established their offices in the Czech Republic are: Coca Cola, Pepsi Cola, Sara Lee, Kraft, Philip Morris, R.J. Reynolds, Heinz, Kroger, Master Foods, McDonald's, Kentucky Fried Chicken, Pizza Hut, American Grill and others. The following table shows imports of major agricultural and food products from the U.S. in 1998, 1999 and during the first eight months of 2000:

HTS Number	Item	1998		1999		Jan-Aug/2000	
		In MT	In mil. CZK	In MT	In mil. CZK	In MT	In mil. CZK
0303	Frozen fish	15	1	97	7	60	4
0408	Birds' eggs and yolks, not in shell	60	7	40	4	29	3
0712	Dried vegetables	413	30	477	32	217	17
0713	Dried leguminous vegetables	141	3	30	3	30	1
0802	Other nuts	830	123	1,419	159	526	57
0805	Citrus fruit, fresh or dried	99	2	20	0	4	0
0806	Grapes, fresh or dried	323	16	205	3	152	11
0813	Dried fruit	394	20	522	27	385	20
1005	Corn	357	14	91	2	77	4
1006	Rice	2,666	31	1,947	26	235	2
1202	Peanuts	748	28	64	2	98	3
1206	Sunflower seeds	846	25	559	20	367	16

1208	Flours and meals of oil seeds or oleaginous	409	10	228	5	64	2
1702	Other sugars, incl. glucose and fructose, sugar syrups, artificial honey	330	9	439	11	410	9
1703	Molasses	526	3	655	4	397	2
1704	Sugar confectionary not containing cocoa	857	49	28	4	31	4
1904	Foods obtained by the swelling or roasting of cereals or cereal products	93	5	82	6	28	2
1905	Bread, pastry and other bakers' wares	23	2	108	8	46	3
2008	Fruit preserved and otherwise prepared	1,273	79	785	56	189	12
2009	Fruit and vegetable juices	254	11	161	10	65	4
2106	Food preparations not elsewhere specified	1,430	250	1,987	422	1,277	251
2204	Wine of fresh grapes, fortified wines	38	2	41	3	29	3
2208	Spirits, liqueurs and other distilled beverages	1,228	129	1,543	155	715	77
2304	Residues resulting from the extraction of soybean oil	21,714	209	2,000	13	N/A	N/A
2309	Petfood	844	40	795	44	175	10
2401	Unmanufactured tobacco	6,207	1,814	3,278	1,057	1,664	541
2402	Cigars, cigarillos and cigarettes	52	28	52	27	18	11

4407	Wood sawn or chipped lengthwise	1,377	91	1,529	82	762	42
4408	Veneer sheets and sheets of plywood	1,185	132	886	76	682	66
5201	Cotton not carded or combed	1,325	114	815	70	608	45

Demographic Developments and Their Impact on Consumer Buying Habits

The number of single households and childless couples is on the rise. The main reasons for this trend are that young people are waiting longer before they have children and women increasingly take more demanding or professional jobs. The result is higher demand for convenience products and frozen foods. Recently, even fresh chilled ready-made meals have become popular. Additionally, along with the boom in hypermarkets and larger home refrigerators, once-a-week food shopping is quickly replacing daily purchases of fresh food items.

Food Expenditures

Per capita food consumption in the Czech Republic in 1998 (1999 not available) was 19,847 CZK. The following table shows food expenditures in CZK of households by social group:

	1996	**1997**	**1998**
Employees	17,149	18,268	19,598
Self-employed	17,859	18,938	19,538
Farmers	14,684	15,832	16,722
Retired	19,957	21,759	22,531

Source: Czech Statistical Yearbook

According to sources, retail food prices may increase by up to a third if and when the Czech Republic joins the European Union (due to higher EU agricultural support prices and border protection). This price increase will be hardest felt outside of Prague, where incomes are up to a third lower.

Advantages and Challenges for U.S. Suppliers on the Czech Market:

Advantages	Challenges
There has been a boom in large hypermarkets that carry up to 30,000 food items.	U.S. exporters have to compete with West European companies that are flooding the Czech market with their products.
The growth in the number of fast food restaurants (McDonald's, Pizza Hut, KFC), more expensive restaurants (TGI Friday's, American Grill) and bars serving food.	Czech importers usually do not import directly due to small quantities - they tend to purchase through European brokers and this increases costs and retail prices.
Fish consumption is relatively low (it is a landlocked country) but fish products are readily accepted by consumers. This represents a good opportunity for U.S. exports of smoked salmon, live lobsters and other seafood.	The distance to this market may make shipping some items uncompetitive.
Interest and willingness of Czech consumers to try new food products.	During the six months, the U.S. dollar appreciated by 17% against the Czech Koruna.
In-store promotions are considered to be a cost effective way to introduce or promote products.	The Czech Republic is harmonizing its legislation with the EU and products containing GMO's will have to be labeled since January 2001.
Great number of European and American tourists - Prague is the second most visited city in Europe after Paris. Visitors often buy foods they are familiar with and Hotel, Restaurant, and Institution (HRI) sales represent an opportunity.	Decreasing population (by 0.2% each year since 1994).
Improving economic situation.	

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs

The Czech system of duties imposed on imports is very transparent and the customs system generally respects the country's obligations in the WTO. Agricultural products, which are considered 'sensitive' commodities in the Czech Republic, are protected by higher tariffs ranging from 50 percent to 200 percent. But in order to preserve competition on the Czech market and expand range of products, some kinds of goods can be imported at lower tariffs within tariff rate quotas (TRQ). These quotas are set for one calendar year and are used automatically until they are exhausted.

Information regarding the fill rate of a particular TRQ is published regularly and can be found on the Internet at: www.cs.mfcr.cz. TRQs are generally administered on an MFN basis (i.e. they are not earmarked for a specific country). TRQs apply to the import of the following commodities: live bovine animals, meat of bovine animals, live swine, meat of swine, live sheep, mutton, poultry, meat of offal, milk and cream, yoghurt, butter, potatoes, fresh grapes, wheat, barley, corn, starches, rape seeds, sunflower seeds, sunflower oil, rape oil, margarine, glucose, pasta, ice cream, waters containing added sugar, sparkling wine, wine of grapes, ethyl alcohol, spirits, dextrins and other modified starches, cane molasses, sugar beet molasses.

The Czech Republic has two VAT rates: 5% on foodstuffs, and 22% on tobacco, alcoholic beverages, seafood. VAT in public catering was reduced from 22% to 5% in April 2000. In addition to the VAT, some products are subject to excise tax. The following list shows the 2000 rates for selected products (will confirm on Friday):

cigarettes less than 70mm	0.67 CZK/piece cigars
cigarettes over 70mm	0.79 CZK/piece
grape wine	no excise tax
beer	24 CZK/hectoliter for each percent of original malt extract (e.g. 10% beer = 240 CZK, 12% beer = 288 CZK)
alcohol and spirits	234 CZK/liter
fortified wines	16.40 CZK/liter
sparkling wines	23.40 CZK/liter

A listing of the product categories subject to excise taxes was published in the government's Excise Tax Act No. 587/92, a copy of which may be obtained through the American Embassy in Prague.

General Consumer Tastes and Preferences

The following are trends and points to consider with regard to Czech consumer tastes and preferences:

- Typical Czech cuisine is quite heavy, usually consisting of meat with a sauce and dumplings. Traditionally, there has been a relatively high level of red meat consumption and a low level of vegetable consumption. There is, however, a trend toward healthier eating which includes lighter meals and international cuisines. This is accompanied by an increase in the consumption of fruits, vegetables, fish, poultry, vegetable oils and margarine.
- Fish consumption is relatively low in comparison with meat consumption. However, fried carp is a widespread and traditional Christmas Eve dish.
- Organic foods are available in supermarkets and specialized stores but there is not yet a significant consumer preference for these goods.
- With arrival of international retail chains, ethnic cuisines (e.g., Tex-Mex) are becoming more well known and more popular.

The following table shows consumption of various kinds of foodstuffs in 1996 and 1997 (more current data are not yet available from the Czech Statistical Office).

Item	**Consumption in kg per capita in 1996**	**Consumption in kg per capita in 1997**
Meat total	85.3	81.5
out of which: Pork	49.2	45.8
Beef	18.2	16.1
Veal	0.3	0.3
Poultry	13.6	15.3
Fish total	5.2	5.5
Fats and oils	22.8	23.0
Vegetable edible fats and oils	15.8	16.2
Milk and milk products	199.2	195.2
Eggs (pieces)	276	311
Cereals	149.8	141.3
Wheat flour	87.0	86.0
Pasta	4.5	4.7
Rye flour	18.6	15.0
Bread	58.4	56.1
Rice	5.0	4.2
Sugar	39.5	39.1
Potatoes	77.2	76.0
Pulses	2.0	1.9
Vegetables	79.5	81.1
Fruit	73.5	71.5
Alcoholic beverages (pure ethanol) and spirits	17.5	18.1

Beer	157.3	161.4
Wine	15.8	15.9
Non-alcoholic beverages	127.0	147.0

Food Standards and Regulations

Food Law no. 110/97 came into force in January 1998, establishing basic rules for food production in the Czech Republic. It is available in English on the Internet: www.czpi.cz. The law has been amended by several decrees, including those concerning the treatment of certain product classes (e.g., frozen products, meat and fish, dried fruits and nuts, tobacco, fresh fruits and vegetables, sweeteners, non-alcoholic beverages, coffee and tea) and food safety (the special treatment of foodstuffs (radiation), microbiological requirements, etc).

Law 110/97 was amended this year and one of the main changes concerns labeling of genetically modified foodstuffs as off January 2001.

The Czech Republic passed Law on Genetically Modified Organisms (GMOs) and will come into force in January 2001. The government is working on Decrees to this law at present. Labeling of GMOs will be required.

General Import and Inspection Procedures

In general there are no special requirements for imported products. All imported products must comply with Czech food safety regulations (Food Law 110/97 along with the relevant decrees). Products of animal origin are subject to certification and the State Veterinary Administration has specific requirements for importing poultry, beef, pork, horse meat, and fish products. These products must be accompanied by the appropriate U.S. Department of Agriculture Food Safety and Inspection Service (FSIS) certificate. Fresh/frozen red meat and poultry are not eligible for export from the U.S. at this time (go to http://www.fsis.usda.gov/OFO/export/explib.htm for a general current listing of certification requirements for meats).

Veterinary law (no. 166/1999), which came into force on September 28, 1999, introduces administrative fees for veterinary checks on animals, animal products, and fodder imported into the Czech Republic. The fee for a veterinary check of one metric ton of live animals is 170 CZK. The fee for one metric ton of animal products and fodder is set at 110 CZK. The minimum fee per consignment is 1,120 CZK and the maximum 11,900 CZK.

The Czech Agricultural and Food Inspection Service (CZPI) is the government organization that regulates food safety for products that have already been imported and are being presented for sale in stores, in restaurants etc. CZPI inspects the quality of foodstuffs, shelf life, expiration dates, prices and other characteristics.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

The Food Retail Sector

The following are trends and points to consider in the Czech food retail sector:

- The total turnover in the food retail sector including sales of alcoholic beverages and tobacco is estimated around 10 billion USD a year.
- In the last few years there has been considerable concentration in the food retail sector, especially with a boom in hypermarkets (defined here as a store with floor space exceeding 2,500 square meters; however, in larger cities there are hypermarkets over 10,000 square meters). Currently there are about 40 hypermarkets in the Czech Republic and retail sector experts believe that within a few years there will be as many as 100 hypermarkets in the country. At that time about ten percent of all retail consumer expenditures will be spent in hypermarkets.
- The concentration is driving small retailers out of the market. On the other hand, hypermarkets have raised the level of service and professionalism in the sector. They offer home deliveries, longer opening hours (usually 9am - 9pm), as well as other services.
- Competition and the strong purchase power of large retailers have kept down retail prices, which has contributed to lower inflation.
- Large international retail chains (the U.K.'s Tesco, the Dutch Ahold, Germany's Globus and Kaufland, the French Carrefour, Belgium's supermarket chain Delvita, and Austria's Julius Meinl) have centralized buying departments, usually at the corporate headquarters. Purchasing agents are usually specialized by category of products (meat, fish, bakery, dairy, produce, dry products, canned products, beverages etc.).
- Walmart plans to enter the Czech Republic sometime next year through acquisition of an existing retail chain.
- The range of food products in retail outlets includes both domestic and imported products. The larger and the more international a company is, the more imported products it carries.
- The new hypermarkets have increased the consumption of fish and seafood products since most of them have large departments with fresh fish and seafood, including live fish in water tanks. Before that, fresh fish was available only in small specialized stores, out of which only the best ones still exist.
- Competition in the retail sector is getting stronger and stronger and in order to gain more market share, companies are cutting their costs significantly.
- The best market entry approach is to find a local importer/distributor who is already established in the large retail chains. Retailers usually do not like to import directly. The only exception is the hypermarket chain Tesco, which imports directly from the U.S. through a wholesale company out of New Jersey called Wakefern (Tesco bought K-mart three years ago and has since had and increased business presence in the United States).
- There are many tourists and expatriates in the Czech Republic, especially in the capital city, Prague. They come mainly from Germany, Austria, U.S., Italy, and France. They like to shop in large supermarkets and hypermarkets and often purchase familiar international products.
- The large retail chains put a lot of emphasis on marketing and promotion, including big sales after the holidays, constant promotion of certain products supported by flyers, tastings of

products etc. (Note: The U.S. Embassy in Prague will help to organize in-store promotions.)

The Hotel, Restaurant, and Institution (HRI) Sector

The following are trends and points to consider in the Czech HRI sector::

- The total turnover in HRI food service sector is estimated at around 8 billion USD a year.
- The trend towards concentration in the retail grocery sector has just started in the HRI sector. This sector is comparatively untapped.
- About 80% of restaurants and institutions prepare meals themselves and buy ingredients from various suppliers, since there are no wholesaler specializing in the HRI sector. About ten percent of HRI establishments purchase ready meals from international caterers (e.g. Sodexho, Eurest, GTH etc.). Another ten percent purchase from domestic companies.
- According to Sodexho, one of the major catering companies in the Czech Republic specialized in institutional catering, about half of their turnover comes from sales to organizations with cafeterias for their employees, the other half comes from state owned institutions (schools, hospitals).
- Catering companies do not import directly, but through large importers and wholesalers.
- There is a trend toward healthier eating, which means that typically heavy Czech cuisine is being substituted with various lighter international cuisines (Italian, French, Chinese, Indian, and Mexican restaurants are becoming more popular) and more fruits and vegetables are being made available.
- Fast food restaurants were quickly established after the political changes in 1989 and several American firms are well established and successfully operating in the Czech Republic (e.g. McDonald's, Pizza Hut, Kentucky Fried Chicken, etc.).

The Food Processing Sector

The following are trends and points to consider in the Czech food processing sector:

- The total turnover in food processing sector is around 7 billion USD a year.
- With almost twenty percent of total industrial output, food processing is one of the most important sectors of the Czech economy. Production of pasta, cheese, and vegetable oils have seen the largest growth.
- Most food processing companies have been privatized, with the exception of several strategic companies (e.g. Budejovicky Budvar which produces Czech Budweiser Beer). State owned companies have a small and declining share of the food processing industry.
- The structure of ownership for privatized food processing companies is as follows: public shareholding companies (64%), limited companies (30%), other (6%).
- While most of food processing companies are Czech-owned, some have been bought by large international companies (e.g. Tabak is owned by Phillip Morris, Cokoladovny by Nestle, Plzensky Prazdroj was bought by South African Breweries from Japanese investment company Nomura, and Prague Breweries sold by British Bass to Belgium Interbrew).
- In order to compete with international exporters of food products, Czech companies are concentrating production efficiency, cutting surplus capacity, and improving equipment and technology. These structural changes are being facilitated by vertical integration through cooperation among processors in related industries, such as malt houses with breweries,

grain mills with bakeries, and livestock producers with meat, poultry, and dairy processors.

The following table show the structure of food processing companies by number of employees:

Number of employees	Number of companies in 1997	Number of companies in 1998	Number of companies in 1999
20 - 49	469	651	618
50 - 99	197	222	230
100 - 299	261	249	240
300 - 499	57	53	52
500 - 999	20	19	16
1000 - 1999	8	9	12
2000 and over	5	3	3

Among the largest food producers and processors are: Tabak - Philip Morris (tobacco), Plzensky Prazdroj (beer), Cokoladovny (candy), Budejovicky Budvar (beer), Setuza, Lukana (vegetable oils), Kostelecke uzeniny, Masokombinat Martinov (meat processing plants), Jan Becher (liquor), Jihoceske mlekarny, Olma, Danone (dairy products), Bohemia Sekt (sparkling wine), Unilever (margarine, ice-cream), Vitana (dried soups), Bohemia Chips (potato chips).

The following table shows the number of companies in 1998 and 1999 by category and industry share (based on turnover):

Production/Processing of:	Number of companies in 1998	Share of turnover in food industry in % in 1998	Number of companies in 1999	Share of turnover in food industry in % in 1999
Meat and meat products	254	20.8	219	21.2
Fish	6	0.5	8	0.6
Fruit and vegetables	36	2.0	31	2.1
Vegetable and animal origin fats and oils	4	5.0	8	4.9
Dairy products	82	15.0	83	14.8
Grain and starch	50	2.6	45	2.5
Livestock feed	73	7.7	79	6.9
Other foods	551	28.3	544	28.0

Beverages	150	18.1	154	19.0
Total	**1,206**	**100**	**1,171**	**100**

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

The following high value products are considered to have good market prospects:

Almonds
Cake mixes
Citrus
Distilled liquor
Dried prunes
Frozen meals
Juice concentrates
Live lobster
Peanuts, peanut butter
Raisins
Rice, wild rice, rice mixes
Sauces and salsa
Smoked salmon
Tex-Mex products
Tobacco products
Wine

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

American Embassy
Agricultural Section
Trziste 15
118 01 Praha 1
Tel: +420-2-5753-1170, or 1171
Fax: +420-2-5753-1173
E-mail: agprague@compuserve.com
Our local web page: http://www.usembassy-vienna.at/usda/
USDA FAS web page: http://www.fas.usda.gov

Ministry of Agriculture
Tesnov 17
117 05 Praha 1
Switchboard: +420-2-2181-1111
http://www.mze.cz

Ministry of Industry and Trade
Na Frantisku 32
110 15 Prague 1
Foreign Relations Section:
Politickych veznu 20
112 49 Prague 1
Switchboard: +420-2-2406-1111
http://www.mpo.cz

Czech Agricultural and Food Inspection
Kvetna 15
603 00 Brno
Switchboard: +420-5-4354-0111
http://www.czpi.cz

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	**YEAR**	**VALUE**
Agricultural Imports From All Countries ($Mil)/U.S. Market Share(%)	1999	$2,147/ 3%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share(%)	1999	$286/ 5%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share(%)	1999	$38/ <1%
Total Population (Millions)*/Annual Growth Rate (%)*	1999	10.2 / -.08%
Urban Population (Millions)*/Annual Growth Rate (%)*	1999	N/A
Number of Major Metropolitan Areas	1999	2
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	7.3 / N/A
Per Capita Gross Domestic Product (U.S. Dollars)	1999	11,700
Unemployment Rate (%)*	1999	9%
Per Capita Food Expenditures (U.S. Dollars)	1999	N/A
Percent of Female Population Employed*	1998	N/A
Exchange Rate 9/2000 (US$1 = 41 CZK-Czech Crowns)**	9/00	

* denotes information collected from www.cia.gov
**denotes information collected from http://quote.yahoo.com

Table B 1

Czech Republic Imports of Agriculture, Fish & Forestry Products
(In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S Market Share		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
BULK AGRICULTURAL TOTAL	490	442	316	62	63	34	13%	14%	11%
Wheat	31	7	4	0	0	0	0%	0%	0%
Coarse Grains	41	16	10	1	1	1	0.42%	0.88%	0.38%
Rice	18	21	19	2	1	1	13%	5%	4%
Soybeans	4	2	3	1	1	1	17%	0.51%	1%
Other Oilseeds	5	9	7	1	1	1	16%	9%	8%
Cotton	109	125	74	2	4	2	2%	3%	3%
Tobacco	129	121	78	55	56	31	43%	46%	39%
Rubber & Allied Gums	30	27	24	1	1	1	0.01%	0.01%	0.01%
Raw Coffee	67	58	43	0	0	0	0%	0%	0%
Cocoa Beans	23	16	19	0	0	0	0%	0%	0%
Tea (Incl. Herb Tea)	7	9	8	0	1	1	0%	0.01%	0.12%
Raw Beet & Cane Sugar	1	3	4	0	1	1	0%	0.16%	0.03%
Pulses	6	7	6	1	1	1	2%	2%	1%
Peanuts	16	16	9	1	1	1	0.26%	5%	0.63%
Other Bulk Commodities	5	7	9	1	1	1	0.06%	0.07%	0.23%
INTERMEDIATE AGRICULTURAL TOTAL	459	516	425	9	14	5	2%	3%	1%
Wheat Flour	1	1	1	0	0	0	0%	0%	0%
Soybean Meal	103	98	76	0	6	1	0%	7%	0.51%
Soybean Oil	12	19	13	1	1	1	0.02%	0.08%	0.10%
Vegetable Oils (Excl. Soybean Oil)	45	59	51	1	1	1	0.08%	0.14%	0.39%
Feeds & Fodders (Excl. Pet Foods)	50	53	48	1	1	1	2%	2%	2%
Live Animals	8	15	11	1	1	1	0.41%	0.12%	2%
Hides & Skins	26	20	11	2	1	1	6%	6%	4%
Animal Fats	2	5	4	1	0	0	0.49%	0%	0%
Planting Seeds	24	24	26	1	1	1	2%	2%	1%
Sugars, Sweeteners, & Beverage Bases	14	24	24	1	1	1	1%	2%	2%
Essential Oils	35	39	40	1	1	1	0.43%	0.47%	0.60%
Other Intermediate Products	139	162	123	6	4	2	4%	2%	2%

	Imports from the World			Imports from the U.S.			U.S Market Share		
	1997	1998	1999	1997	1998	1999	1997	1998	1999
Breakfast Cereals & Pancake Mix	8	8	7	1	1	1	2%	2%	2%
Red Meats, Fresh/Chilled/Frozen	13	39	28	1	1	0	0.48%	0.22%	0%
Red Meats, Prepared/Preserved	16	16	15	1	1	1	0.09%	0.17%	0.16%
Poultry Meat	20	19	21	1	0	0	0.05%	0%	0%
Dairy Products (Excl. Cheese)	34	42	45	1	1	0	0.03%	0.13%	0%
Cheese	28	27	31	0	0	0	0%	0%	0%
Eggs & Products	7	6	3	2	1	1	29%	4%	5%
Fresh Fruit	181	171	171	1	1	1	0.11%	0.07%	0.03%
Fresh Vegetables	94	114	100	1	1	1	0.04%	0.03%	0.02%
Processed Fruit & Vegetables	98	107	103	4	5	4	4%	4%	4%
Fruit & Vegetable Juices	42	37	29	1	1	1	0.92%	0.88%	0.99%
Tree Nuts	27	21	20	4	4	5	16%	18%	24%
Wine & Beer	36	28	30	1	1	1	0.19%	0.22%	0.31%
Nursery Products & Cut Flowers	36	37	43	1	1	1	0.96%	1%	1%
Pet Foods (Dog & Cat Food)	8	9	10	1	1	1	1%	2%	2%
Other Consumer-Oriented Products	234	275	286	8	8	14	3%	3%	5%
FOREST PRODUCTS (EXCL. PULP & PAPER)	213	258	272	8	8	5	4%	3%	2%
Logs & Chips	26	39	39	1	1	1	0.25%	0.18%	0.03%
Hardwood Lumber	20	25	26	3	3	2	14%	11%	9%
Softwood and Treated Lumber	18	19	22	1	1	1	0.03%	0.18%	0.20%
Panel Products (Incl. Plywood)	86	97	104	5	4	3	6%	5%	2%
Other Value-Added Wood Products	63	78	82	1	1	1	0.41%	0.52%	0.22%
FISH & SEAFOOD PRODUCTS	78	80	69	1	1	1	0.35%	0.07%	0.70%
Salmon	2	2	2	1	1	1	9%	0.43%	7%
Surimi	9	7	5	0	0	0	0%	0%	0%
Crustaceans	2	2	2	1	0	0	0.49%	0%	0%
Groundfish & Flatfish	20	23	20	1	0	1	0.07%	0%	0.78%
Molluscs	1	1	1	0	0	0	0%	0%	0%
Other Fishery Products	44	45	38	1	1	1	0.20%	0.12%	0.48%
AGRICULTURAL PRODUCTS TOTAL	1,935	2,026	1,806	90	96	64	5%	5%	4%
AGRICULTURAL, FISH & FORESTRY TOTAL	2,226	2,364	2,147	99	104	69	4%	4%	3%

NA - Data not available (not reported) ***Data: Harmonized Tariff Schedule (HS 6 Digit)***

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Table B 2

AGRICULTURAL, FISH & FORESTRY TOTAL

Reporting Country: Czech Republic Top 15 Ranking	Import		
	1997	1998	1999
	1000$	1000$	1000$
Germany	363,324	414,138	378,525
Slovakia	169,502	191,286	181,073
Poland	78,010	120,516	141,203
Austria	90,078	111,322	111,238
Netherlands	103,076	118,117	107,065
Italy	93,281	100,155	100,022
Spain	99,058	104,042	93,817
Hungary	91,961	89,223	90,085
France	92,709	95,577	84,250
United States	98,890	103,738	69,412
Brazil	75,082	78,120	62,505
Denmark	30,822	46,144	48,121
Belgium	0	0	47,817
China (Peoples Republic of)	37,400	38,892	41,882
Greece	28,790	36,430	33,610
Other	773,991	716,430	556,211
World	2,226,060	2,364,297	2,147,034

NA - Data not available (not reported)   Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Table B 3

BULK AGRICULTURAL TOTAL

Reporting Country: Czech Republic Top 15 Ranking	Import		
	1997	1998	1999
	1000$	1000$	1000$
United States	61,757	62,686	34,123
Slovakia	11,908	28,149	21,296
Uzbekistan, Republic of	39,226	44,443	20,193
Indonesia	13,616	13,017	14,646
Vietnam	13,177	17,591	13,756
Cote d'Ivoire	14,440	7,886	13,636
Greece	10,733	16,036	13,537
Zimbabwe	30,396	11,642	11,119
Turkey	12,767	11,733	10,534
China (Peoples Republic of)	5,578	8,090	10,379
Brazil	21,030	28,408	10,004
India	15,889	13,754	9,867
Kyrgyzstan, Republic of	9,790	9,158	9,774
Malawi	13,953	7,073	8,632
Malaysia	9,958	8,237	7,727
Other	205,888	153,751	106,307
World	490,116	441,674	315,556

NA - Data not available (not reported) *Data: Harmonized Tariff Schedule (HS 6 Digit)*

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Table B 4

INTERMEDIATE AGRICULTURAL TOTAL - 200

Reporting Country: Czech Republic Top 15 Ranking	Import		
	1997	1998	1999
	1000$	1000$	1000$
Germany	130,287	161,489	136,351
Slovakia	32,232	46,090	35,733
France	28,180	33,005	28,504
Netherlands	32,719	31,326	28,283
Australia	38,991	33,263	22,583
Austria	16,744	24,645	20,938
Brazil	42,635	31,391	19,925
Poland	6,668	14,994	12,695
United Kingdom	7,768	23,207	10,792
Hungary	7,121	8,232	10,360
Italy	5,846	7,467	8,175
Denmark	8,518	8,390	8,080
Ireland	7,188	8,942	7,776
Sweden	5,900	8,540	7,596
Belgium	0	0	6,911
Other	87,790	75,315	59,777
World	458,592	516,320	424,525

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Table B 5

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400

Reporting Country: Czech Republic Top 15 Ranking	Import		
	1997	1998	1999
	1000$	1000$	1000$
Germany	110,313	137,513	130,604
Poland	53,938	79,630	96,947
Slovakia	91,773	82,579	90,281
Spain	89,135	92,498	84,987
Italy	77,502	80,237	82,125
Netherlands	63,773	79,633	72,516
Hungary	62,722	68,577	69,088
Austria	44,025	55,354	58,149
France	59,061	56,860	48,767
Belgium	0	0	32,285
Brazil	11,262	18,277	31,943
Denmark	12,815	24,978	26,303
United States	19,581	19,632	24,340
Colombia	25,324	43,710	21,295
Greece	17,823	20,202	19,651
Other	247,063	207,953	176,173
World	986,170	1,067,712	1,065,535

NA - Data not available (not reported) *Data: Harmonized Tariff Schedule (HS 6 Digit)*

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

Table B 6

FISH & SEAFOOD PRODUCTS

Reporting Country: Czech Republic Top 15 Ranking	Import		
	1997	1998	1999
	1000$	1000$	1000$
China (Peoples Republic of)	4,227	9,562	9,530
Germany	16,252	14,598	8,888
Denmark	5,489	7,214	7,184
Poland	7,636	7,702	6,943
Thailand	4,278	4,911	6,074
Norway	5,329	3,466	4,014
Netherlands	3,621	3,647	2,758
Estonia	1,180	1,825	2,452
Croatia	4,508	3,994	2,398
Russian Federation	2,615	2,149	1,780
France	1,213	1,839	1,764
Spain	2,756	2,846	1,758
Ireland	1,529	2,082	1,525
Italy	1,528	1,972	1,443
Argentina	3,432	1,161	1,237
Other	12,557	11,345	9,211
World	78,158	80,333	68,978

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office