



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Competitive Trade Analysis Czech Republic

June 2016



REPORT CONTENT SUMMARY

- This report looks to highlight the major sectors in the Czech Republic, and attempts to identify the best opportunities for Canadian exports.
- Specifically, the data analysis that follows focuses on the top ten Czech imports by major aggregate sector, of which Canada maybe a supplier. It identifies the gap between Czech Republic's imports from the world and the proportion provided by Canada, and then outlines top international competitors.
- Unless otherwise specified, all figures in this document are based on import data as reported by Eurostat, and were sourced from Global Trade Atlas (2015).

CZECH REPUBLIC MARKET SUMMARY

- In 2014, the Czech Republic was the 33rd-largest importer of agri-food and seafood products in the world, and the 14th-largest among members of the European Union (EU) with C\$11.0 billion in imports. Czech Republic is also the world's 36th-largest agri-food and seafood exporter (14th-largest in the EU) with C\$9.7 billion in exports. However, the C\$1.3 billion trade deficit in 2014 highlights the country dependency for agri-food and seafood imports.
- Czech Republic's top agri-food and seafood trading partners include Germany with 24.1% of total import value, Poland (16.9%), and the Netherlands (9.2%). Canada was Czech Republic's 29th-largest import provider in 2014, representing C\$29.0 million, or just 0.3% of the market.

Note: Please see the Annex at the end of this document for a list of abbreviations that will be used throughout this report.

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TRADE OVERVIEW

Czech Republic sources a diverse range of agri-food and seafood products from 144 international suppliers. Key import commodities include meat and edible offal (12.2% of total imports), dairy, eggs and honey (7.7%), and miscellaneous edible preparations (7.3%). The top three supplying countries of overall agri-food and seafood imports are Germany, Poland and the Netherlands. Canada is ranked 29th among supplying countries to Czech Republic, and registered a compound annual growth rate (CAGR) of -3.7% from 2010-14.

Czech Republic's Top Ten Suppliers of Agri-Food and Seafood Products, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	7,825.47	9,093.06	9,160.87	10,083.40	11,016.28	8.93
1 Germany	2,109.10	2,444.94	2,345.59	2,591.04	2,649.18	5.87
2 Poland	1,112.16	1,315.37	1,368.03	1,606.25	1,861.04	13.74
3 Netherlands	756.37	858.33	816.03	895.08	1,011.35	7.53
4 Slovakia	720.97	822.16	972.50	967.88	972.46	7.77
5 Italy	403.79	487.75	467.02	485.37	515.96	6.32
6 Spain	349.98	387.08	393.80	447.06	498.32	9.24
7 Belgium	277.76	329.57	312.20	359.71	455.66	13.17
8 Austria	377.46	434.78	434.89	414.63	445.02	4.20
9 Hungary	300.91	357.85	374.66	397.60	437.19	9.79
10 France	331.54	383.21	369.13	406.25	431.57	6.81
29 Canada	33.70	32.83	30.90	26.34	29.00	-3.69

Czech Republic's Top Ten Suppliers of Agri-Food and Seafood Products, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
1 Germany	26.95	26.89	25.60	25.70	24.05	-2.90
2 Poland	14.21	14.47	14.93	15.93	16.89	2.68
3 Netherlands	9.67	9.44	8.91	8.88	9.18	-0.49
4 Slovakia	9.21	9.04	10.62	9.60	8.83	-0.38
5 Italy	5.16	5.36	5.10	4.81	4.68	-0.48
6 Spain	4.47	4.26	4.30	4.43	4.52	0.05
7 Belgium	3.55	3.62	3.41	3.57	4.14	0.59
8 Austria	4.82	4.78	4.75	4.11	4.04	-0.78
9 Hungary	3.85	3.94	4.09	3.94	3.97	0.12
10 France	4.24	4.21	4.03	4.03	3.92	-0.32
29 Canada	0.43	0.36	0.34	0.26	0.26	-0.17

Agri-Food and Seafood Products Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	7,825.47	9,093.06	9,160.87	10,083.40	11,016.28	8.93
Czech Republic's imports from Canada	33.70	32.83	30.90	26.34	29.00	-3.69
Supply gap	7,791.77	9,060.23	9,129.97	10,057.06	10,987.28	8.97



Meat and edible offal represented Czech Republic's top-grossing import commodity in 2014, with a value of over C\$10.0 billion, or 12.2% of overall agri-food and seafood imports. Across the 2010 to 2014 period, nine of the top ten categories had a compound annual growth rate (CAGR) over 8.0%. The categories of coffee, tea and spice, and food waste and animal feed were the strongest growing commodities over the period, with compound annual growth rates (CAGR) of 19.5% and 10.7%.

**Czech Republic's Top Ten Agri-Food and Seafood Commodity Imports from the World,
C\$ Millions**

Rank	HS Code	Commodity	2010	2011	2012	2013	2014	CAGR % 2010-14
Total agri-food and seafood imports			7,825.47	9,093.06	9,160.87	10,083.40	11,016.28	8.93
1	02	Meat and edible offal	920.36	1,107.24	1,176.58	1,234.95	1,340.43	9.86
2	04	Dairy, eggs and honey	614.96	695.79	685.29	753.68	849.84	8.42
3	21	Miscellaneous edible preparations	552.20	643.64	691.95	749.46	804.78	9.87
4	08	Edible fruit and nuts	630.47	675.44	641.20	730.81	768.21	5.06
5	22	Beverages	525.05	639.53	576.12	657.45	751.87	9.39
6	19	Baking related goods and pasta	496.15	581.52	587.86	658.10	692.55	8.70
7	23	Food waste and animal feed	455.81	501.40	528.56	637.47	683.48	10.66
8	07	Edible vegetables	589.49	586.44	518.19	614.62	626.72	1.54
9	18	Cocoa and cocoa preparations	355.32	400.62	394.26	440.47	513.65	9.65
10	09	Coffee, tea, and spices	200.85	264.67	240.57	247.62	409.26	19.48



TOP TEN AGRI-FOOD AND SEAFOOD COMMODITY IMPORTS

1. MEAT AND EDIBLE OFFAL

Czech Republic's Top Ten Suppliers of Meat and Edible Offal, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	920.36	1,107.24	1,176.58	1,234.95	1,340.43	9.86
Germany	320.07	346.33	341.20	397.36	410.08	6.39
Poland	173.29	189.78	202.39	237.39	287.48	13.49
Netherlands	89.46	135.46	135.37	110.82	122.21	8.11
Slovakia	57.12	83.15	110.76	90.74	89.52	11.88
Spain	38.92	44.60	59.31	74.38	86.88	22.24
Austria	65.68	87.12	82.88	81.49	86.49	7.13
Belgium	38.14	45.16	54.91	67.69	68.49	15.76
Denmark	19.52	27.22	35.67	29.90	43.36	22.09
Hungary	32.07	41.36	46.96	45.99	40.18	5.80
France	22.11	28.04	37.31	37.14	36.18	13.10

Czech Republic's Top Ten Suppliers of Meat and Edible Offal, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	34.78	31.28	29.00	32.18	30.59	-4.19
Poland	18.83	17.14	17.20	19.22	21.45	2.62
Netherlands	9.72	12.23	11.51	8.97	9.12	-0.60
Slovakia	6.21	7.51	9.41	7.35	6.68	0.47
Spain	4.23	4.03	5.04	6.02	6.48	2.25
Austria	7.14	7.87	7.04	6.60	6.45	-0.69
Belgium	4.14	4.08	4.67	5.48	5.11	0.97
Denmark	2.12	2.46	3.03	2.42	3.23	1.11
Hungary	3.48	3.74	3.99	3.72	3.00	-0.48
France	2.40	2.53	3.17	3.01	2.70	0.30



Meat and Edible Offal Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	920.36	1,107.24	1,176.58	1,234.95	1,340.43	9.86
Czech Republic's imports from Canada	-	-	-	-	-	-
Supply gap	920.36	1,107.24	1,176.58	1,234.95	1,340.43	9.86

Czech Republic's Top Five Meat and Edible Offal Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
020319	Fresh boneless pork	387.22	413.29	456.02	8.52
020311	Fresh pork carcasses and half carcasses	101.03	115.13	117.02	7.63
020130	Fresh boneless beef	73.56	88.36	113.34	24.12
020714	Frozen chicken cuts and edible offal	117.95	92.54	110.32	-3.29
020312	Fresh bone-in pork (hams and shoulders)	103.20	110.87	105.05	0.90

Czech Republic's Top Meat and Edible Offal Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
020319	Fresh boneless pork	Germany 47.02	Poland 16.20	Austria 11.51	N/A
020311	Fresh pork carcasses and half carcasses	Germany 47.67	Belgium 40.48	Poland 6.81	N/A
020130	Fresh boneless beef	Poland 25.97	Netherlands 24.28	Ireland 17.42	N/A
020714	Frozen chicken cuts and edible offal	Slovakia 31.95	Netherlands 24.90	Denmark 15.26	N/A
020312	Fresh bone-in pork (hams and shoulders)	Germany 34.00	Netherlands 14.65	Spain 12.26	N/A



2. DAIRY, EGGS AND HONEY

Czech Republic's Top Ten Suppliers of Dairy, Eggs and Honey, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	614.96	695.79	685.29	753.68	849.84	8.42
Germany	241.10	263.46	267.34	305.32	332.50	8.37
Poland	187.72	212.20	182.66	194.52	221.65	4.24
Slovakia	76.06	99.97	105.93	117.20	124.35	13.07
Netherlands	20.92	19.76	25.02	30.41	42.34	19.28
France	18.07	27.91	28.12	28.09	30.12	13.63
Italy	13.35	16.40	18.45	21.20	25.41	17.46
Belgium	24.14	24.13	16.63	16.92	20.37	-4.16
Austria	8.28	7.67	9.19	7.48	7.88	-1.22
United Kingdom	2.09	1.90	3.19	4.00	7.64	38.22
Lithuania	2.91	3.32	4.03	6.87	7.49	26.72
(52) Canada	0.02	0.03	0.00	0.00	0.00	-100.00

Czech Republic's Top Ten Suppliers of Dairy, Eggs and Honey, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	39.21	37.87	39.01	40.51	39.13	-0.08
Poland	30.53	30.50	26.65	25.81	26.08	-4.45
Slovakia	12.37	14.37	15.46	15.55	14.63	2.26
Netherlands	3.40	2.84	3.65	4.04	4.98	1.58
France	2.94	4.01	4.10	3.73	3.54	0.60
Italy	2.17	2.36	2.69	2.81	2.99	0.82
Belgium	3.93	3.47	2.43	2.24	2.40	-1.53
Austria	1.35	1.10	1.34	0.99	0.93	-0.42
United Kingdom	0.34	0.27	0.47	0.53	0.90	0.56
Lithuania	0.47	0.48	0.59	0.91	0.88	0.41
(52) Canada	0.00	0.00	0.00	0.00	0.00	0.00

Dairy, Eggs and Honey Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	614.96	695.79	685.29	753.68	849.84	8.42
Czech Republic's imports from Canada	0.02	0.03	0.00	0.00	0.00	-100.00
Supply gap	614.94	695.76	685.29	753.68	849.84	8.42



Czech Republic's Top Five Dairy, Eggs and Honey Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
040690	Specialty cheese	222.40	254.70	290.05	14.20
040510	Butter	76.93	91.08	92.76	9.80
040610	Fresh cheese and cheese curds	63.95	80.20	92.11	20.02
040630	Processed cheese	42.97	46.34	46.02	3.49
040310	Yogurt	34.36	34.46	38.80	6.26

Czech Republic's Top Five Dairy, Eggs and Honey Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's Share
		1	2	3	
040690	Specialty cheese	Germany 44.05	Poland 27.72	Netherlands 7.72	N/A
040510	Butter	Germany 41.26	Poland 29.27	Belgium 15.06	N/A
040610	Fresh cheese and cheese curds	Germany 56.09	Poland 18.73	Slovakia 13.70	N/A
040630	Processed cheese	Poland 51.73	Germany 17.89	Slovakia 17.33	N/A
040310	Yogurt	Germany 44.40	Poland 31.77	Slovakia 10.11	N/A



3. MISCELLANEOUS EDIBLE PREPARATIONS

Czech Republic's Top Ten Suppliers of Miscellaneous Edible Preparations, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	552.20	643.64	691.95	749.46	804.78	9.87
Germany	113.67	124.86	177.27	184.46	194.37	14.35
Poland	114.52	139.41	124.22	136.31	141.70	5.47
United Kingdom	12.01	17.64	45.58	54.61	55.38	46.56
Slovakia	53.39	44.24	39.53	45.54	51.87	-0.72
Turkey	0.97	37.83	40.89	43.86	47.49	164.25
Netherlands	31.71	29.45	31.84	36.32	42.41	7.54
Hungary	32.40	38.81	38.20	39.36	35.43	2.27
France	28.49	36.85	27.66	29.61	35.39	5.57
Italy	17.85	23.55	26.22	25.14	29.94	13.80
Austria	31.29	27.28	24.30	28.56	28.38	-2.41
(19) Canada	7.34	6.66	5.60	5.39	5.44	-7.24

Czech Republic's Top Ten Suppliers of Miscellaneous Edible Preparations, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	20.58	19.40	25.62	24.61	24.15	3.57
Poland	20.74	21.66	17.95	18.19	17.61	-3.13
United Kingdom	2.17	2.74	6.59	7.29	6.88	4.71
Slovakia	9.67	6.87	5.71	6.08	6.45	-3.22
Turkey	0.18	5.88	5.91	5.85	5.90	5.72
Netherlands	5.74	4.58	4.60	4.85	5.27	-0.47
Hungary	5.87	6.03	5.52	5.25	4.40	-1.47
France	5.16	5.73	4.00	3.95	4.40	-0.76
Italy	3.23	3.66	3.79	3.35	3.72	0.49
Austria	5.67	4.24	3.51	3.81	3.53	-2.14
(19) Canada	1.33	1.03	0.81	0.72	0.68	-0.65

Miscellaneous Edible Preparations Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR 2010-14
Czech Republic's imports from the world	552.20	643.64	691.95	749.46	804.78	9.87
Czech Republic's imports from Canada	7.34	6.66	5.60	5.39	5.44	-7.24
Supply gap	544.86	636.98	686.35	744.07	799.35	10.06



Czech Republic's Top Five Miscellaneous Edible Preparation Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
210690	Food preparations	319.02	355.93	386.44	10.06
210111	Extracts, essence and concentrates of coffee	139.10	147.11	149.44	3.65
210390	Sauces and condiments	75.12	77.64	83.45	5.40
210500	Ice cream and other edible ice	46.52	47.35	50.05	3.72
210112	Preparations with a basis of extracts, essences and concentrates of coffee	19.52	22.99	26.61	16.75

Czech Republic's Top Five Miscellaneous Edible Preparation Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
210690	Food preparations	Germany 18.79	Poland 14.49	Turkey 12.26	1.34
210111	Extracts, essence and concentrates of coffee	Germany 42.93	United Kingdom 22.26	Spain 11.65	N/A
210390	Sauces and condiments	Poland 29.69	Germany 21.18	Slovakia 12.09	N/C
210500	Ice cream and other edible ice	Germany 33.71	Poland 31.15	Hungary 10.35	N/A
210112	Preparations with a basis of extracts, essences and concentrates of coffee	Poland 55.08	Hungary 17.17	Spain 7.99	N/C



4. EDIBLE FRUIT AND NUTS

Czech Republic's Top Ten Suppliers of Edible Fruit and Nuts, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	630.47	675.44	641.20	730.81	768.21	5.06
Germany	100.83	118.68	115.48	135.54	134.78	7.52
Spain	95.49	103.05	106.11	123.59	126.57	7.30
Netherlands	91.52	88.76	82.23	93.73	86.10	-1.52
Italy	90.09	99.28	76.83	71.97	73.28	-5.03
Belgium	33.98	41.91	40.86	47.29	68.07	18.97
France	48.46	41.53	38.53	36.66	51.23	1.40
Slovakia	32.78	37.33	50.89	45.91	44.37	7.86
Poland	16.68	16.44	19.85	28.82	32.98	18.59
Turkey	18.61	21.89	16.51	20.66	22.54	4.91
Georgia	7.66	9.13	6.89	13.39	18.56	24.78
(72) Canada	0.00	0.00	0.01	0.00	0.00	N/C

Czech Republic's Top Ten Suppliers of Edible Fruit and Nuts, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	15.99	17.57	18.01	18.55	17.54	1.55
Spain	15.15	15.26	16.55	16.91	16.48	1.33
Netherlands	14.52	13.14	12.82	12.83	11.21	-3.31
Italy	14.29	14.70	11.98	9.85	9.54	-4.75
Belgium	5.39	6.20	6.37	6.47	8.86	3.47
France	7.69	6.15	6.01	5.02	6.67	-1.02
Slovakia	5.20	5.53	7.94	6.28	5.78	0.58
Poland	2.65	2.43	3.10	3.94	4.29	1.65
Turkey	2.95	3.24	2.58	2.83	2.93	-0.02
Georgia	1.21	1.35	1.08	1.83	2.42	1.20
(72) Canada	0.00	0.00	0.00	0.00	0.00	0.00

Edible Fruit and Nuts Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	630.47	675.44	641.20	730.81	768.21	5.06
Czech Republic's imports from Canada	0.00	0.00	0.01	0.00	0.00	N/C
Supply gap	630.47	675.44	641.19	730.81	768.21	5.06



Czech Republic's Top Five Edible Fruit and Nut Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
080390	Fresh bananas	110.08	116.42	139.53	12.59
080610	Fresh grapes	63.73	74.23	68.81	3.91
080520	Fresh mandarins	49.15	49.41	49.29	0.14
080810	Fresh apples	56.21	57.34	47.36	-8.21
080550	Fresh or dried lemons and limes	31.77	40.32	46.27	20.69

Czech Republic's Top Five Edible Fruit and Nut Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
080390	Fresh bananas	Belgium 38.40	France 29.89	Germany 21.23	N/A
080610	Fresh grapes	Italy 33.40	Netherlands 28.86	Germany 21.54	N/A
080520	Fresh mandarins	Spain 60.61	Germany 10.33	Croatia 9.75	N/A
080810	Fresh apples	Poland 29.34	Italy 21.21	Slovakia 18.52	N/A
080550	Fresh or dried lemons and limes	Spain 37.40	Germany 22.12	Netherlands 16.95	N/A



5. BEVERAGES

(Excl. juices)

Czech Republic's Top Ten Suppliers of Beverages, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	525.05	639.53	576.12	657.45	751.87	9.39
Germany	86.72	101.10	85.27	102.77	118.00	8.01
Slovakia	76.43	91.89	80.54	90.88	98.69	6.60
Italy	64.39	80.03	69.81	71.55	72.24	2.92
France	48.29	54.02	62.22	70.99	62.27	6.56
Poland	42.96	63.97	45.42	52.50	57.82	7.71
Netherlands	25.01	35.24	30.74	39.99	48.91	18.25
Spain	20.27	25.77	28.36	35.98	46.99	23.39
Hungary	36.88	35.18	28.78	33.47	46.86	6.17
Austria	30.70	36.25	38.52	34.56	37.22	4.93
Belgium	2.96	5.02	2.66	2.83	30.56	79.28
(20) Canada	2.06	2.63	2.60	2.85	3.02	10.13

Czech Republic's Top Ten Suppliers of Beverages, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	16.52	15.81	14.80	15.63	15.69	-0.83
Slovakia	14.56	14.37	13.98	13.82	13.13	-1.43
Italy	12.26	12.51	12.12	10.88	9.61	-2.65
France	9.20	8.45	10.80	10.80	8.28	-0.92
Poland	8.18	10.00	7.88	7.98	7.69	-0.49
Netherlands	4.76	5.51	5.34	6.08	6.50	1.74
Spain	3.86	4.03	4.92	5.47	6.25	2.39
Hungary	7.02	5.50	5.00	5.09	6.23	-0.79
Austria	5.85	5.67	6.69	5.26	4.95	-0.90
Belgium	0.56	0.79	0.46	0.43	4.06	3.50
(20) Canada	0.39	0.41	0.45	0.43	0.40	0.01

Beverage Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	525.05	639.53	576.12	657.45	751.87	9.39
Czech Republic's imports from Canada	2.06	2.63	2.60	2.85	3.02	10.13
Supply gap	522.99	636.90	573.52	654.61	748.85	9.39



Czech Republic's Top Five Beverage Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
220421	Grape wines, <2L	143.49	162.22	153.22	3.34
220290	Non-alcoholic beverages, including milk based drinks and non-alcoholic beer	78.70	99.42	117.50	22.19
220210	Mineral water	74.03	74.02	94.91	13.23
220429	Grape wines and must, >2L	51.30	62.24	69.04	16.00
220830	Whiskies	31.96	37.78	47.23	21.56

Czech Republic's Top Five Beverage Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
220421	Grape wines, <2L	France 19.98	Italy 19.24	Germany 15.02	N/C
220290	Non-alcoholic beverages, including milk based drinks and non-alcoholic beer	Germany 25.12	Poland 25.03	Netherlands 14.24	0.39
220210	Mineral water	Slovakia 36.92	Austria 22.88	Poland 14.09	2.18
220429	Grape wines and must, >2L	Spain 25.95	Italy 24.08	Hungary 16.15	N/C
220830	Whiskies	Ireland 34.97	Germany 16.39	United Kingdom 16.20	1.03



6. BAKING RELATED GOODS AND PASTA

Czech Republic's Top Ten Suppliers of Baking Related Goods and Pasta, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	496.15	581.52	587.86	658.10	692.55	8.70
Germany	150.14	165.24	160.00	175.56	177.39	4.26
Poland	99.94	127.36	136.61	149.44	147.28	10.18
Slovakia	66.79	78.19	70.59	78.25	79.39	4.42
Italy	30.57	37.92	37.18	44.85	52.01	14.21
France	24.18	27.76	31.10	35.77	38.29	12.18
Belgium	19.38	24.17	23.73	27.66	34.27	15.31
Austria	30.19	31.83	28.46	31.67	32.76	2.06
United Kingdom	14.35	16.57	20.60	23.36	31.55	21.77
Hungary	12.53	18.95	25.96	31.93	29.69	24.07
Netherlands	12.27	13.51	13.71	16.21	21.97	15.68
(36) Canada	0.01	0.01	0.02	0.07	0.08	55.27

Czech Republic's Top Ten Suppliers of Baking Related Goods and Pasta, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	30.26	28.41	27.22	26.68	25.61	-4.65
Poland	20.14	21.90	23.24	22.71	21.27	1.13
Slovakia	13.46	13.45	12.01	11.89	11.46	-2.00
Italy	6.16	6.52	6.32	6.82	7.51	1.35
France	4.87	4.77	5.29	5.44	5.53	0.66
Belgium	3.91	4.16	4.04	4.20	4.95	1.04
Austria	6.09	5.47	4.84	4.81	4.73	-1.36
United Kingdom	2.89	2.85	3.50	3.55	4.56	1.67
Hungary	2.52	3.26	4.42	4.85	4.29	1.77
Netherlands	2.47	2.32	2.33	2.46	3.17	0.70
(36) Canada	0.00	0.00	0.00	0.01	0.01	0.01

Baking Related Goods and Pasta Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	496.15	581.52	587.86	658.10	692.55	8.70
Czech Republic's imports from Canada	0.01	0.01	0.02	0.07	0.08	55.27
Supply gap	496.13	581.51	587.84	658.03	692.47	8.69



Czech Republic's Top Five Baking Related Goods and Pasta Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
190590	Bread, pastry, cakes and puddings	223.46	248.86	269.88	9.90
190531	Cookies (sweet biscuits)	102.53	114.10	107.36	2.33
190190	Malt extract, flour, meal and milk	41.33	48.93	54.92	15.28
190532	Waffles and wafers	43.02	44.19	50.64	8.50
190110	Food preparations for infants	50.23	56.08	47.58	-2.67

Czech Republic's Top Five Baking Related Goods and Pasta Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
190590	Bread, pastry, cakes and puddings	Poland 26.25	Germany 25.70	Belgium 7.93	N/A
190531	Cookies (sweet biscuits)	Slovakia 35.59	Poland 20.42	Germany 19.48	N/A
190190	Malt extract, flour, meal and milk	Germany 61.41	Slovakia 13.48	United Kingdom 7.25	0.12
190532	Waffles and wafers	Poland 53.55	Germany 13.33	Slovakia 11.58	N/A
190110	Food preparations for infants	Germany 28.01	Netherlands 21.86	United Kingdom 21.34	N/A



7. FOOD WASTE AND ANIMAL FEED

Czech Republic's Top Ten Suppliers of Food Waste and Animal Feed, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	455.81	501.40	528.56	637.47	683.48	10.66
Germany	240.81	250.71	245.18	289.43	278.47	3.70
Netherlands	26.14	32.34	40.17	60.11	77.50	31.22
Poland	29.83	40.91	46.41	62.92	71.19	24.29
Hungary	23.90	27.35	32.93	35.96	43.66	16.25
Austria	20.56	17.98	16.55	28.26	31.78	11.51
Belgium	14.75	15.64	15.39	20.90	25.16	14.28
Slovakia	10.69	12.31	13.34	21.54	22.76	20.80
Italy	6.97	9.40	11.59	15.30	20.61	31.13
United Kingdom	8.42	11.74	12.82	14.46	18.98	22.54
France	18.07	17.64	16.32	14.81	17.07	-1.41
(13) Canada	14.09	10.70	10.76	8.59	8.36	-12.23

Czech Republic's Top Ten Suppliers of Food Waste and Animal Feed, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	52.83	50.00	46.39	45.40	40.74	-12.09
Netherlands	5.73	6.45	7.60	9.43	11.34	5.61
Poland	6.54	8.16	8.78	9.87	10.42	3.88
Hungary	5.24	5.46	6.23	5.64	6.39	1.15
Austria	4.51	3.59	3.13	4.43	4.65	0.14
Belgium	3.24	3.12	2.91	3.28	3.68	0.44
Slovakia	2.35	2.46	2.52	3.38	3.33	0.98
Italy	1.53	1.88	2.19	2.40	3.01	1.48
United Kingdom	1.85	2.34	2.43	2.27	2.78	0.93
France	3.96	3.52	3.09	2.32	2.50	-1.46
(13) Canada	3.09	2.13	2.04	1.35	1.22	-1.87

Food Waste and Animal Feed Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	455.81	501.40	528.56	637.47	683.48	10.66
Czech Republic's imports from Canada	14.09	10.70	10.76	8.59	8.36	-12.23
Supply gap	441.72	490.70	517.80	628.88	675.12	11.19



Czech Republic's Top Five Food Waste and Animal Feed Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
230400	Soymeal	201.00	235.84	226.42	6.14
230910	Dog and cat food, put up for retail	161.29	183.60	210.48	14.23
230990	Animal feed, except cat and dog food	113.47	133.91	145.74	13.33
230110	Flour meal and pellet meat	9.45	19.00	23.09	56.31
230800	Vegetable material and waste	11.48	13.87	20.33	33.07

Czech Republic's Top Five Food Waste and Animal Feed Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
230400	Soymeal	Germany 75.46	Netherlands 17.35	Poland 5.20	N/A
230910	Dog and cat food, put up for retail	Germany 21.16	Poland 19.15	Hungary 15.75	3.81
230990	Animal feed, except cat and dog food	Germany 34.72	Netherlands 12.84	United Kingdom 10.06	0.23
230110	Flour meal and pellet meat	Slovakia 27.52	Germany 18.77	Italy 15.15	N/A
230800	Vegetable material and waste	Mexico 64.74	Netherlands 10.92	Poland 5.51	N/A



8. EDIBLE VEGETABLES

Czech Republic's Top Ten Suppliers of Edible Vegetables, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	589.49	586.44	518.19	614.62	626.72	1.54
Netherlands	129.98	116.66	105.48	120.60	119.33	-2.12
Spain	93.60	102.74	94.43	102.51	107.66	3.56
Germany	89.89	90.43	72.52	110.03	101.46	3.07
Poland	54.19	54.31	54.41	64.13	74.79	8.39
France	41.99	47.71	29.94	39.95	42.11	0.08
Italy	34.32	38.53	38.18	42.71	40.21	4.04
Belgium	30.23	25.91	25.83	33.99	36.33	4.70
Slovakia	24.95	20.91	23.38	21.86	22.15	-2.94
Hungary	16.53	15.68	14.17	15.24	17.20	1.00
Austria	16.76	17.45	12.12	10.87	10.54	-10.96
(14) Canada	6.16	5.89	4.66	5.70	5.34	-3.49

Czech Republic's Top Ten Suppliers of Edible Vegetables, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Netherlands	22.05	19.89	20.36	19.62	19.04	-3.01
Spain	15.88	17.52	18.22	16.68	17.18	1.30
Germany	15.25	15.42	13.99	17.90	16.19	0.94
Poland	9.19	9.26	10.50	10.43	11.93	2.74
France	7.12	8.13	5.78	6.50	6.72	-0.40
Italy	5.82	6.57	7.37	6.95	6.42	0.60
Belgium	5.13	4.42	4.99	5.53	5.80	0.67
Slovakia	4.23	3.56	4.51	3.56	3.53	-0.70
Hungary	2.80	2.67	2.73	2.48	2.75	-0.05
Austria	2.84	2.98	2.34	1.77	1.68	-1.16
(14) Canada	1.04	1.00	0.90	0.93	0.85	-0.19

Edible Vegetable Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	589.49	586.44	518.19	614.62	626.72	1.54
Czech Republic's imports from Canada	6.16	5.89	4.66	5.70	5.34	-3.49
Supply gap	583.33	580.55	513.53	608.93	621.38	1.59



Czech Republic's Top Five Edible Vegetable Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
070200	Fresh tomatoes	119.57	124.17	133.58	5.70
070960	Fresh peppers	73.96	80.12	83.29	6.12
070700	Fresh cucumbers and gherkins	53.51	57.06	58.86	4.88
070190	Fresh table potatoes	22.00	57.28	47.02	46.20
070310	Fresh onions and shallots	16.20	29.45	28.81	33.35

Czech Republic's Top Five Edible Vegetable Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
070200	Fresh tomatoes	Netherlands 33.02	Spain 20.55	Germany 13.11	N/A
070960	Fresh peppers	Spain 30.39	Netherlands 28.61	Germany 12.72	N/A
070700	Fresh cucumbers and gherkins	Spain 33.86	Germany 17.26	Netherlands 15.43	N/A
070190	Fresh table potatoes	Germany 38.07	France 31.46	Netherlands 10.58	N/A
070310	Fresh onions and shallots	Netherlands 25.66	Germany 24.46	Poland 11.13	N/A



9. COCOA AND COCOA PREPARATIONS

Czech Republic's Top Ten Suppliers of Cocoa and Cocoa Preparations, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	355.32	400.62	394.26	440.47	513.65	9.65
Germany	96.63	111.57	100.80	124.14	141.29	9.96
Netherlands	59.01	60.29	46.08	50.69	75.72	6.43
Belgium	31.08	43.84	45.47	55.83	64.72	20.12
Poland	47.69	44.71	36.54	47.10	55.49	3.86
Slovakia	54.89	59.90	44.65	55.55	52.21	-1.24
Austria	8.28	12.62	52.04	35.10	37.20	45.58
Italy	13.00	20.14	22.62	20.15	24.24	16.86
Hungary	11.20	12.02	15.03	17.61	22.37	18.89
France	12.22	13.46	10.72	9.46	11.80	-0.88
United Kingdom	3.91	6.29	5.50	5.82	7.36	17.15
(24) Canada	0.14	0.10	0.11	0.16	0.25	15.61

Czech Republic's Top Ten Suppliers of Cocoa and Cocoa Preparations, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	27.19	27.85	25.57	28.18	27.51	0.32
Netherlands	16.61	15.05	11.69	11.51	14.74	-1.87
Belgium	8.75	10.94	11.53	12.67	12.60	3.85
Poland	13.42	11.16	9.27	10.69	10.80	-2.62
Slovakia	15.45	14.95	11.33	12.61	10.16	-5.29
Austria	2.33	3.15	13.20	7.97	7.24	4.91
Italy	3.66	5.03	5.74	4.58	4.72	1.06
Hungary	3.15	3.00	3.81	4.00	4.36	1.21
France	3.44	3.36	2.72	2.15	2.30	-1.14
United Kingdom	1.10	1.57	1.40	1.32	1.43	0.33
(24) Canada	0.04	0.03	0.03	0.04	0.05	0.01

Cocoa and Cocoa Preparation Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	355.32	400.62	394.26	440.47	513.65	9.65
Czech Republic's imports from Canada	0.14	0.10	0.11	0.16	0.25	15.61
Supply gap	355.18	400.52	394.15	440.31	513.39	9.65



Czech Republic's Top Five Cocoa and Cocoa Preparation Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
180690	Cocoa preparations, not in bulk form	175.20	201.82	233.67	15.49
180632	Chocolate and other cocoa preparations, not in bulk, not filled	82.84	81.02	84.04	0.72
180631	Chocolate and other cocoa preparations, not in bulk, filled	44.89	52.04	65.08	20.40
180620	Chocolate preparations, in blocks, >2 kg	41.28	54.23	56.52	17.02
180400	Cocoa butter, fat and oil	12.42	17.14	35.57	69.22

Czech Republic's Top Five Cocoa and Cocoa Preparation Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
180690	Cocoa preparations, not in bulk form	Germany 31.20	Belgium 15.44	Poland 11.22	N/C
180632	Chocolate and other cocoa preparations, not in bulk, not filled	Germany 42.25	Austria 15.49	Slovakia 12.01	N/C
180631	Chocolate and other cocoa preparations, not in bulk, filled	Germany 39.05	Poland 22.07	Slovakia 10.22	N/C
180620	Chocolate preparations, in blocks, >2Kg	Belgium 36.41	Slovakia 26.86	Germany 8.71	0.43
180400	Cocoa butter, fat and oil	Netherlands 95.80	France 1.59	Italy 0.37	N/A



10. COFFEE, TEA AND SPICES

Czech Republic's Top Ten Suppliers of Coffee, Tea and Spices, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
World	200.85	264.67	240.57	247.62	409.26	19.48
Poland	45.75	58.71	42.39	51.12	145.85	33.62
Germany	25.19	40.93	31.63	46.48	76.32	31.93
Slovakia	21.02	6.15	8.47	12.30	31.56	10.69
Netherlands	8.79	12.43	11.80	14.75	17.53	18.85
Brazil	16.69	30.58	25.93	16.30	17.35	0.97
Italy	10.07	11.06	13.68	14.39	15.63	11.61
Austria	7.02	11.49	20.17	15.21	15.39	21.68
United Kingdom	8.31	11.87	14.71	12.35	13.92	13.77
Hungary	8.89	8.78	7.87	8.13	9.18	0.80
Vietnam	5.77	6.82	7.38	7.21	9.17	12.27
(66) Canada	0.56	0.09	0.01	0.00	0.02	-59.25

Czech Republic's Top Ten Suppliers of Coffee, Tea and Spices, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Poland	22.78	22.18	17.62	20.64	35.64	12.86
Germany	12.54	15.47	13.15	18.77	18.65	6.11
Slovakia	10.47	2.32	3.52	4.97	7.71	-2.76
Netherlands	4.37	4.69	4.91	5.96	4.28	-0.09
Brazil	8.31	11.56	10.78	6.58	4.24	-4.07
Italy	5.01	4.18	5.69	5.81	3.82	-1.19
Austria	3.50	4.34	8.38	6.14	3.76	0.26
United Kingdom	4.14	4.49	6.12	4.99	3.40	-0.74
Hungary	4.43	3.32	3.27	3.28	2.24	-2.19
Vietnam	2.87	2.58	3.07	2.91	2.24	-0.63
(66) Canada	0.28	0.03	0.00	0.00	0.00	-0.28

Coffee, Tea and Spice Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Czech Republic's imports from the world	200.85	264.67	240.57	247.62	409.26	19.48
Czech Republic's imports from Canada	0.56	0.09	0.01	0.00	0.02	-59.25
Supply gap	200.28	264.58	240.56	247.62	409.24	19.56



Czech Republic's Top Five Coffee, Tea and Spice Product Imports, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
090121	Coffee, roasted and not decaffeinated	114.55	114.26	255.25	49.27
090111	Coffee, not roasted and not decaffeinated	65.13	65.15	56.48	-6.87
090190	Coffee substitutes with coffee	1.13	2.48	15.23	267.58
090230	Packaged black tea, < 3 kg	13.55	14.23	14.06	1.88
090411	Pepper of genus piper, neither crushed nor grounded	8.54	8.85	10.12	8.90

Czech Republic's Top Five Coffee, Tea and Spice Product Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
090121	Coffee, roasted and not decaffeinated	Poland 45.33	Germany 20.96	Slovakia 10.17	N/A
090111	Coffee, not roasted and not decaffeinated	Brazil 30.71	Vietnam 15.73	Honduras 9.43	N/A
090190	Coffee substitutes with coffee	Poland 93.94	Austria 2.11	Netherlands 1.73	N/A
090230	Packaged black tea, < 3 kg	Poland 36.97	Hungary 14.44	United Arab Emirates 14.40	0.01
090411	Pepper of genus piper, neither crushed nor grounded	Netherlands 37.27	Poland 23.02	Germany 16.40	N/A



CONCLUSION

Czech Republic is a developing market, and the world's 33rd-largest importer of agri-food and seafood products. Canada ranked as Czech Republic's 29th-largest supplier in 2014, having registered a decrease in import value since 2010. Canada represented less than 1.0% of the Czech Republic's agri-food and seafood imports, Canada remains marginal compared to other countries, such as Czech Republic's European partners. This has created a significant supply gap between Czech Republic and Canada that has been widening at a rate similar to Czech Republic's overall import growth in recent years. Czech Republic has a diversified agri-food and seafood suppliers; however, the top ten primary trading partners are European Union members.

Although Canada's imports (less than 1.0% market share) to the Czech Republic are relatively small compared to their suppliers, Canada did see a slight increase in market share in three out of the ten commodities over the last five years. These commodities were beverages, baking related goods and pasta, and cocoa and cocoa preparations. Once the Canada-European Union comprehensive Economic and Trade Agreement (CETA) enters into force this will provide Canada with preferential market access to 10.5 million (the Czech Republic's total population) consumers in the EU. The agreement will also eliminate approximately 95% of all of the EU tariff lines on the first day the agreement comes into force, creating significant opportunities in the agricultural and fish and seafood sectors for Canada.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Czech Republic**
<http://www.tradecommissioner.gc.ca/eng/office.jsp?oid=260&cid=203>
- **Find a Trade Commissioner**
www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- ats-sea.agr.gc.ca

RESOURCES

Global Trade Atlas (October 2015).

ANNEX: ABBREVIATIONS

CAGR - compound annual growth rate
N/A - not applicable
N/C - not calculable
PP - percentage point (difference between two percentage values)



Competitive Trade Analysis: Czech Republic

Global Analysis Report

Prepared by: Carlos Jaramillo, Student

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please contact:

Agriculture and Agri-Food Canada, Global Analysis
1341 Baseline Road, Tower 5, 3rd floor
Ottawa, ON
Canada K1A 0C5
E-mail: infoservice@agr.gc.ca

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