



**ÚZEI**

ÚSTAV ZEMĚDĚLSKÉ EKONOMIKY  
A INFORMACÍ

**ROČENKA AGRÁRNÍHO ZAHRANIČNÍHO OBCHODU ČR  
ZA ROK 2011**

**AGRARIAN FOREIGN TRADE YEARBOOK 2011**

**(informační studie)**

**Praha, 2012**

## EXECUTIVE SUMMARY

Within the EU-27, the Czech Republic is neither important exporter nor importer of agricultural products, whereby imports slightly outweigh exports. For the EU-12, however, it ranks as one of the most important exporters and importers. In 2011 in comparison to the average of five preceding years, the Czech share in total agricultural EU-27 exports increased by 0,09 p.p. to 1.21 % and in imports by 0,11 p.p. to 1,53 %. However, the Czech Republic is one of the most significant exporters and importers within the EU-12.

In 2011, the Czech agricultural exports amounted 121.0 billion CZK and Czech agricultural imports reached 156.1 billion CZK, making the trade balance deficit 35.1 billion CZK, highest it has ever been. After three years of stagnation, the rates of Czech agricultural export and import growth increased in 2011 (to 14.8 % and 11.5 %, respectively). The balance deficit within the Czech agricultural intra-trade developed favorably. Its value decreased by 1.7 billion CZK between 2010 and 2011, to 21.2 billion CZK. The turnover of Czech agricultural trade with third countries increased year-to-year in 2011 but the balance deficit of this trade rose by 2.2 billion CZK to 13.9 billion CZK.

Czech agricultural intra-trade saw no important changes in its territorial structure in 2011. The order of main buyers and suppliers of agricultural products from/to the Czech Republic has not changed since 2008 or even 2005. The most significant trade partners on the Czech agricultural export side are Slovakia, Germany, Poland, Italy, Austria and Hungary. Germany, Poland, Slovakia, Netherlands, Italy and Spain have the biggest shares in Czech agricultural imports. The EU-27 share in Czech agricultural exports and imports, already relatively high, remained approximately the same and amounted in 2011 to 91.8% and 87.8 %<sup>1</sup>, respectively. The greater intensity of Czech trade with the EU-12 than with EU-15 was caused mostly by record values of Czech exports and imports to/from Poland.

The territorial and commodity structure of Czech agricultural extra-trade is more variable. The significant year-to-year changes in 2011 were mainly represented by increases in value of imports from Brazil (as a result of higher imports of *“meat and offal of poultry”, “coffee”* and *“soy-bean oilcakes”*) and from Turkey (due to higher imports of *CN 2106 “other food preparations”*). Furthermore, a considerable decrease of Czech agricultural exports to Japan was observed because of lower exports of *“hops”* to this destination.

The main net suppliers of agricultural products to the Czech Republic are Germany, Poland, Netherlands, Spain, Brazil, France and Belgian. The trade deficit with these countries rose in 2011 in comparison to the average over the period of 2006-10. A substantially active trade balance was achieved only with Slovakia. Its value increased by 47.5% to 22.4 billion CZK in the monitored period.

In 2011, the main Czech exported agricultural commodities (measured by total value) were *“cigarettes”, “wheat”, “not concentrated milk and cream”, “other food preparations”, “baker’s wares”, „preparations of a kind used in animal feeding”, rape oil”, “chocolate and other preparations containing cocoa”, “beer”, “cheese and curd”, “sugar confectionery”, “sugar”, “live bovine animals”* and *“sweetened or flavoured non-alcoholic beverage”*. The most important Czech imported agricultural commodities were *“meat of swine”, “baker’s wares”, “chocolate and other preparations containing cocoa”, “cheese and curd”, “other food preparations”, “meat and offal of poultry”, „preparations of*

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<sup>1</sup> The share amounts 87.8 % on the basis of Czech Statistical Office, which monitors imports according to country of origin. On the basis of Eurostat, which monitors imports according to country of consignment, the share amounts 92.8 %.

*a kind used in animal feeding*”, “coffee”, “wine”, “soya-been oilcakes”, “cigarettes” and “sweetened or flavoured non-alcoholic beverage”.

The biggest increases of the export value in 2011 in comparison to the average of the period of 2006-10 were recorded for “wheat”, “cigarettes”, “rape oil”, „preparations of a kind used in animal feeding”, “other food preparations”, “baker’s wares“, “cheese and curd”, “not concentrated milk and cream”, “corn”, “barley”, “live bovine animals”, “other prepared or preserved meat, meat offal or blood” (CN 1602), “sausages and similar products”, “coffee” and “chocolate and other preparations containing cocoa”. In many cases, the growth of export values was caused by higher export prices.

The most substantial growth of import value in the monitored period were observed in “meat of swine”, “baker’s wares“, “cheese and curd”, “coffee”, “rape oil”, “margarine”, “other food preparations”, “other sauces and mixed seasonings (CN 2103 90), “denatured ethyl alcohol”, “rape oil” and “wine”. In some cases, the growth of import values resulted from higher prices. For example, import value of “coffee” increased by 948.0 million CZK while import volume stagnated.

Average export and import prices of “coffee”, cereals, products of milling industry, “starches”, “rapeseeds”, “rape oilcakes”, oils, “margarine”, “sugar”, “other sugar” (CN 1702), “ethyl alcohol minimally 80%” and “denatured ethyl alcohol” increased year-to-year in 2011. Average prices of most kinds of imported vegetables decreased except for “potatoes”, “cabbages” and “carrots”, as well as for fruit with the exception of “bananas”, “apples” and “plums”. Average export and import prices of monitored kinds of meat and meat offal decreased or increased by less than 10%. Within the milk and dairy products, significant year-to-year increase of average import price was recorded for “not concentrated milk and cream”, large increase of export prices of “concentrated milk and cream” and “cheese and curd”, as well as higher export and import prices of “butter”. Export prices of “dairy spreads” increased and import prices fell. However, average unit prices reflect not only price level itself but also differences in territorial structure and in quality.

Comparative advantage in 2011 was especially observed for cereals, some oilseeds and oils, live animals, milk and dairy products (except for “butter”, “cheese and curd” and “dairy spreads”), “sugar”, “confectionery”, „preparations of a kind used in animal feeding” and “cigarettes”. Preparations of cereals enjoy comparative advantage only rarely; when they do it is usually in the less traded commodity aggregates. Within beverages, only “beer” is considerably able to compete. However, the value of its exports has been falling in the last four years.