

**ROČENKA AGRÁRNÍHO ZAHRANIČNÍHO OBCHODU ČR  
ZA ROK 2012**

**AGRARIAN FOREIGN TRADE YEARBOOK 2012**

**(informační studie)**

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## EXECUTIVE SUMMARY

For the purposes of this publication we define foreign trade as trade with EU Member States and third countries, such trade with other EU Member States. Definitions of agricultural goods are taken from chapters 01 through 24 of the Customs Tariff.

Trade on the EU single market is recorded only for entities that are obliged to file a report on this with Intrastat. For the remaining entities, figures are estimated through mathematical and statistical methods by the Czech Statistical Office. 5.0% of all agrarian exports and 5.3% of all agrarian imports had to be estimated in this way for 2012.

Czech share of total EU-27 exports and imports increased slightly in 2012 (to 1.35% and 1.58% respectively). The share in EU-12 trade decreased (to 11.16% and 14.57% respectively).

Agricultural commodities represented 5.4% of all Czech exports and 6.3% of imports.

Value of the Czech agrarian exports in 2012 increased by 23% to CZK 147.4 billion, while the value of the Czech agricultural imports rose by 10% to CZK 172.2 billion. As a result, the agricultural trade deficit of the Czech Republic was reduced to CZK 24.5 billion.

The majority of Czech agrarian trade is within the EU single market. The share of EU-27 in Czech exports has exceeded 90 % for a long time (91.3% in 2012). On the import side, EU-27 comprises 91.3 % under the criterion of country of origin, and 92.8 % under the criterion of country of delivery. The negative balance of agrarian trade with the EU-27 decreased to 11.8 billion CZK, within which there was a reduction of net imports from EU-15 to CZK 30.4 billion and an increase in net exports to the EU-12 to CZK 18.6 billion.

Czech foreign trade with third countries is more variable than intra-EU in both volume and territorial and commodity structure. In 2012 the value of exports outside the EU increased by 29% to CZK 12.9 billion and imports increased by 7% to CZK 25.6 billion. Most significantly, third countries participate in total Czech agricultural exports (as far as the more significant commodities go) of "hops" (74% on average went to third countries in 2010-12), "whey" (50%), "pectin substances pectinates and pectates" (47%), "milk and cream, concentrated or sweetened" (47%), "eggs" (39%), "starch" (29%), "oats" (25%), "beer" (24%), "poppy-seeds" 31% and "malt" (22%).

The country list of major foreign suppliers and recipients of agricultural goods into and from the Czech Republic in 2012 remained unchanged. Most significant suppliers are Germany, Poland, Slovakia, the Netherlands, Italy, Spain, Austria, Hungary and France; for recipients, Slovakia, Germany, Poland, Italy, Austria and Hungary.

The greatest agricultural trade balance deficit is in trade with Poland, Germany, the Netherlands, Spain and Brazil (with slight changes in the order since previous years). Trade balance surplus exists in trade with Slovakia, and (also with slight in the order) with Russia, Romania and the United Kingdom.

2012 saw for the first time a positive balance in agricultural trade with Italy and for the second time with Austria (the first was in 2010). In the case of Italy, in particular, it was especially the value of exported cigarettes which contributed to this improvement; they are the most important item of Czech agricultural exports to this country and without them the trade balance would have remained negative. This is so in spite of the fact that since 2011 the Czech Republic has been significantly growing its export of cheese to the country. For Austria it was above all exports of rapeseed oil that affect the balance of trade with agricultural goods. Also here the balance would otherwise be negative.

Overall, in 2012 the Czech Republic mainly exported "cigarettes", "canola oil", "wheat", "milk and cream, not concentrated nor sweetened", "sugar", "Bread, pastry, cakes, biscuits and other baker's wares", "other food preparations" (HS 2106), "products used in animal nutrition", "beer", "rapeseed", "live bovine animals", "cheese and curd", "sugar confectionery, not containing cocoa", "malt" and "lemonade".

In contrast, the Czech Republic imported in particular "meat of swine", "bread, pastry, cakes biscuits and other baker's wares", "chocolate and other food preparations containing cocoa", "cheese and curd", "other food preparations", "meat and offal of poultry", "preparations used for animal feed", "cigarettes", "soya oil cake", "wine", "coffee", "extracts and concentrates of coffee" and "lemonade".

Therefore, the leading Czech net-export commodities in 2012 were "wheat", "canola oil", "milk and cream, not concentrated nor sweetened", "cigarette", "beer", "live bovine animals", "sugar", "malt", "rapeseed", "milk and cream, concentrated or sweetened", "barley" and "sugar confectionery not containing cocoa" - i.e. especially those commodities with strong exports.

On the other hand, the major net-import commodities for the Czech Republic were "pork", "soya oil cake", "meat and offal of poultry", "wine", "cheese and curd", "tobacco", "tomatoes", "citrus fruit", "peppers", "food preparations of flour, meal, starch, malt extract," "margarine" and "bananas", i.e. not only the most important import commodities, but also some leading export commodities.

In most major net-import commodities, 2012 deepened the trade deficit in year-on-year comparison. Notable exceptions were "cheese and curd", "bread, pastry, cakes, biscuits and other baker's wares", "coffee" and some fruits, fresh or processed. The most important net-export commodities can be characterised as having increased the value of positive balance or merely stagnated. The only exception was "fermented milk products".

Czech agricultural foreign trade was most heavily affected by the growth in unit prices in 2012. Historic maxima were reached, for example, by live animals, meat, eggs and cereals.