

Annual Report

THE FEDERATION OF THE FOOD AND DRINK
INDUSTRIES OF THE CZECH REPUBLIC

2011



POTRAVINÁŘSKÁ
KOMORA
ČESKÉ REPUBLIKY



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Introduction

Last year, the Act on a Significant Market Power, which proved to be very successful in the practice, belonged amongst the fundamental topics again. Nevertheless, its cancellation or replacement with other laws was on agenda at the same time. From the perspective of the FFDI CR, other legislation is possible, but it is indispensable to comply with the following provisions of the Act: 30 days' maturity, prohibition of refunds, prohibition of transferring penalties, one-invoice-one-price rule (net – net price), and the prohibition of sale for less than purchase prices.

In 2011, the Government regulation on the check of imports of animal commodities, which proved to be very effective, in particular, thanks to the duty to notify beforehand of imported animals and raw material of the animal origin in order to assess risks, etc., was also adopted for the food industry. It will be our endeavor to achieve that similar legislation is also adopted for commodities of the vegetable origin.

Another completely essential topic for the Federation of the Food and Drink Industries of the Czech Republic and the entire food sector was, and still is, the quality of food. The problem is apparent: a growing number of products in which an expensive raw material is substituted with a less expensive raw material, for example, with the mixture of redundant poultry body parts, soya, or vegetable fats. The cause of this state is clear – a constant pressure of supply chains on the lowest price of food products possible.

Also for this reason, the FFDI CR was focused on many activities connected with the support and promotion of quality Czech food. One of them was the endeavor to create such a labeling of food products that would guarantee not only the processing in the territory of the Czech Republic, but also the respective share of the Czech raw material in a product. The result of these deliberations and endeavors was the logo Czech Product – guaranteed by the Federation

of the Food and Drink Industries of the Czech Republic. The logo is awarded to products processed and produced in the territory of the Czech Republic with certain shares of a domestic raw material depending on the type of a product. First certificates were awarded in June 2011 and by the end of the year, more than 20 companies were awarded certificates for nearly 1,500 products.

With the endeavor to support traditional Czech food, the FFDI CR applied with the EC for a project for marketing support of the Protected Geographical Indication and Protected Designation of Origin. I strongly believe that a bigger enlightenment with respect to these European indications and the Czech food which is their bearer will help further promote quality domestic food.

“Last year, the Act on a Significant Market Power, which proved to be very successful in the practice, belonged amongst the fundamental topics again.”

Miroslav Toman, President



"Within the support of the implementation of the priorities proposed, the Federation was also devoted to the implementation of activities focused on desirable changes to the entrepreneurial environment, in particular, on improving the functioning of the market, simplifying the legislation, and supporting export and the domestic consumption, including adequate protection of the domestic market, because these belong among the basic attributes of a competitive economy."

Miroslav Koberna, Program and Strategy Director

Federation of the Food and Drink Industries in 2011

In 2011, the general meeting of the FFDI CR confirmed, to the fullest extent, the priorities adopted and implemented in the previous years and proposed in the context of the continuing economic and political instability both in the Czech Republic and the whole EU. With regard to their reflection in the Federation's practical activity in the evaluated period, its activities were focused, again, on:

- preserving the volume of the Czech food production which preferably processes the domestic raw material, in particular, by means of marketing events focused on Czech consumers, but also by strengthening the ability to export through both the existing and newly proposed pro-export tools;
- ensuring the competitiveness of Czech producers thanks to the arrangement of the maximum possible volume of money from operational programs intended for processors and by proposing national programs which suitably complement the union subsidies;
- Czech Technology Food Platform's activity and involvement in programs of the European Commission, which should effectively help increase the share of products with a high added value in the food production;

- increasing the intensity of cooperation both between members and the secretariat and amongst members themselves and strengthening communication towards representatives of the public administration and elected structures of the Czech Republic.

Within the support of the implementation of the priorities proposed, the Federation was also devoted to the implementation of activities focused on desirable changes to the entrepreneurial environment, in particular, on improving the functioning of the market, simplifying the legislation, and supporting export and the domestic consumption, including adequate protection of the domestic market, because these belong among the basic attributes of a competitive economy.

Last year, the Ministry of Agriculture started getting ready for a new program period and decided to establish a wide platform for communication with the professional public and non-governmental organizations in the form of working groups expressing their standpoints on individual areas of the new rural development program.





As a reaction to the preparation of a new common agricultural policy for 2013 and the attempts of the “old” member countries at other transitory periods and new limitations for new member countries, the “Initiative of Entrepreneurs in the Agricultural and Food Industries” was created and participated in by the Federation and its goal was to lob in Prague and Brussels, in cooperation with the Ministry of Agriculture and other relevant entities, for equal conditions for Czech agriculturists and processors. With joint efforts, for example, subsidies for big processing plants were provided, the national envelope was preserved, and the conditions of applying ceilings and of the “greening” were mitigated. The dealings continue in the current year with the aim of obtaining maximum for Czech processors and agriculturists.

The Federation’s basic priority is the area of subsidies for the food industry. In the previous period, the food producers’ interest in projects continued and other industrial areas were revived too, which confirmed the endeavor to strengthen the competitiveness of both the given area and the processing industry generally. Although most problems with respect to the administration on the part of payment agencies were removed, problems, in particular, in the area of an unclear and non-uniform interpretation of rules remained, in particular, in the case of competition procedures for suppliers. This can constitute a big risk in the future, and the Czech state and its attempt at being better than Brussels are to blame for the complexity and ambiguity. The Federation was interested in helping improve and simplify the administration of projects, for example through regular checks and the evaluation of the implementation of

projects by applicants like it is done, for example, by the Economic Chamber for the Ministry of Industry and Trade, but the resistance of officers from the Ministry of Agriculture and the SAIF was so strong that we decided to cancel the project in the end.

With respect to the Rural Development Program under the auspices of the Ministry of Agriculture, four rounds have already taken place in action I.1.3 and, same as in the previous periods, excessive requirements are imposed. Thus, it is apparent how underinvested the food sector is and how much money would be necessary to strengthen it. After initial hesitations, the interest in supporting innovation projects within action I.1.3.2, where the requirements start to be excessive too, is fully exhibited and, in the future, the Federation will strive to achieve a re-arrangement of the money intended for modernizations and innovations for the benefit of innovations. In case of the Ministry of Industry and the operational program Entrepreneurship and Innovations, the cooperation got better last year regardless continuing personnel changes at the Ministry. Nevertheless, the results are not yet optimum for food entrepreneurs and, on the contrary, there is a lack of applicants for projects compared to the past. The Federation will keep trying to achieve a better coordination of subsidies between both departments as it is usual abroad. Regarding the national subsidy for food entrepreneurs 13, funds were considerably cut down within the state budget savings for 2011, which will be reflected in reduced subsidies for applicants.

Potravinářská komora v roce 2011

In relation to the evaluation of the Czech retail market, it must be stated that the pessimistic prognoses on the part of traders did not come true, as usual, and, regardless the economic crisis, there was another concentration of supply chains whose turnovers and margins were preserved. Moreover, the share of foreign products and private brands in the market continued rising. It seems that along with the economic crisis bottoming out, which has had an adverse effect on the consumer's interest in quality products, the interest in quality Czech food bearing the logo "KLASA" and, newly, in regional products associated under the logo Regional Food is restored and, thus, there is a chance to change the negative development. Regarding the area of supplier-customer relationships, it can be stated that despite all catastrophic visions, the Act on a Significant Market Power helped make relationships equal and definitely had a positive impact at least on the sensitive areas, such as maturity dates and refunds of food. The amendment of the Act prepared together with the Office for the Protection of Competition, the Ministry of Industry and Trade, the Ministry of Agriculture, and the Ministry of Finance and supported by the Entrepreneurial Council represents hope for a simplified interpretation of the Act and the removal of its imperfections, and the only opponent of the amendment remains to be the Trade and Tourism Association and the entities connected with it. The perception of supply chains changed too within the EU where analyses prepared by the European Commission proved that damage was caused to the common market and, in particular, to suppliers in the area of small and medium businesses by the supply chains' practices, and several proposals, both on the European and national bases, for regulating the position of supply chains came to appear. The solution on the Europe-wide basis is also supported by the Federation.

The Federation's long-term priority is the consumer who decides whether to buy cheap non-quality goods of an unknown origin or a quality product from a traditional Czech producer. Consumers still do not have sufficient objective information for their decision-making and, for this reason, the Ministry's decision to continue supporting the KLASA and Regional Food brands is important. As its own activity, the Federation has prepared projects for "fresh food" and the national brand "Czech Product – guaranteed by the Federation of the Food and Drink Industries of the Czech Republic", which are to further improve consumers' awareness. At the end of the year, already 37 producers had this brand, which was fully arranged by the Federation, for nearly 2,000 products. This activity was also positively perceived by the media.

Within the action for promoting a healthy lifestyle and balanced diet, in particular, in children, the Federation supports projects, together with the Czech Technology Food Platform, focused on the development of the right habits. The successful project focused on students "Easily Live Healthily" continued and a new project intended for high school students was prepared upon agreement with the Association of Regions.

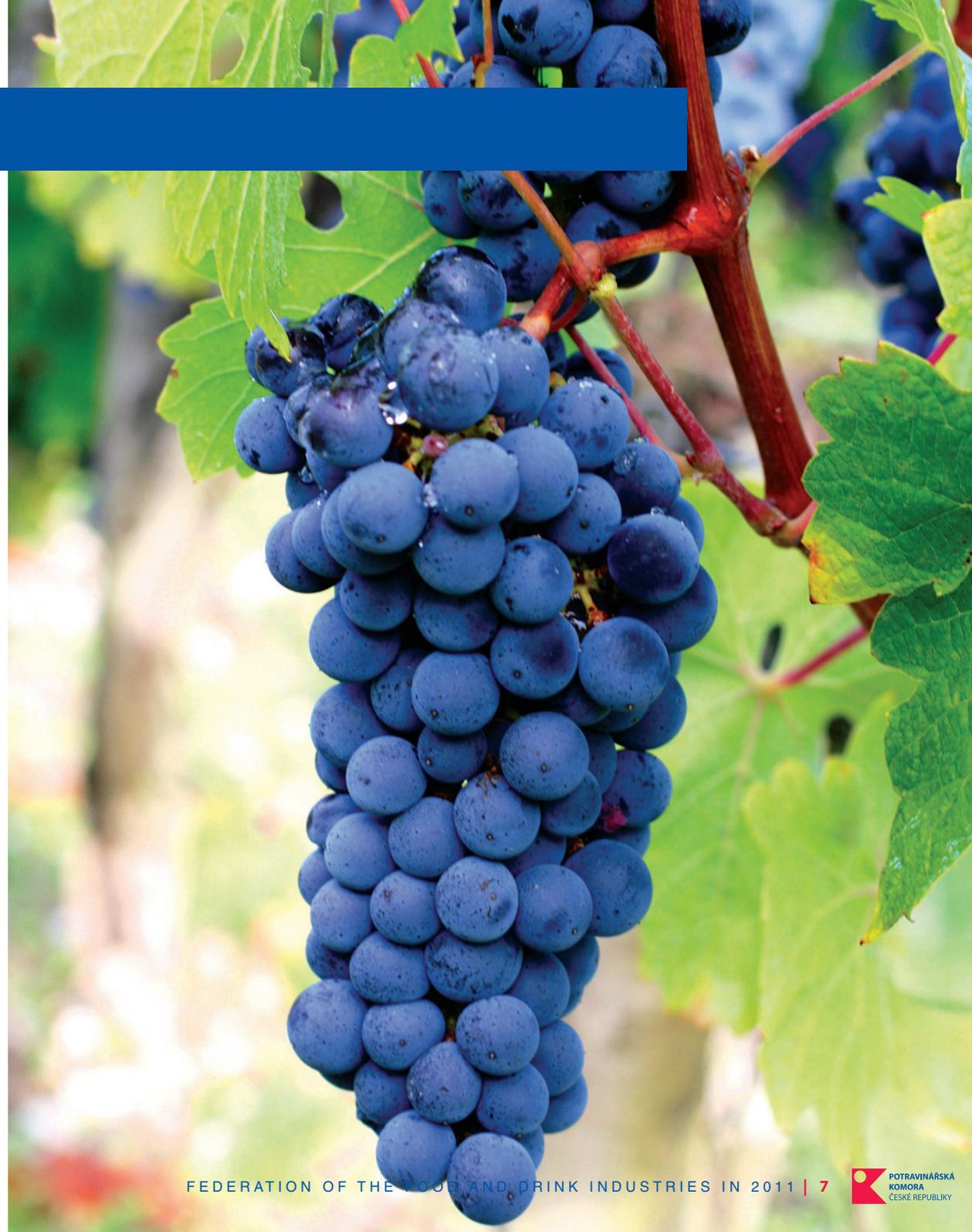
In the area of increasing the competitiveness, the support of export both to the common European market and third countries is crucial. With regard to the development of the political situation in the Czech Republic, it must be stated, after the successful missions to China, Rumania, and Bulgaria and due to an increased activity in Russia and some countries of the former Soviet Union, that everything turned for the worse again and the missions organized in the past years can be considered neither effective nor sufficiently promotion-oriented on Czech food entrepreneurs.

The Czech Technology Food Platform (CTFP) kept extending the scope of its activities thanks to the continuing national subsidy provided by the Ministry of Agriculture. Within its professional, publication, and organizational activities, not only CTFP's basic documents – Vision, Strategic Research Agenda, and Implementation Plan, but also, in particular, results of the working groups' activities were published. Again, the platform supported many seminars and conferences regardless the problems associated with the amendments of the VAT Act and ensured extensive communication not only amongst expert partners in the area of science and research and food producers through the Project Consulting Center, but also with the representatives of state institutions and elected bodies with the help of the Group for Effective Communication – Food Club. Although the limitation of the subsidy, which would also mean a limitation of activities and could be substituted only by increasing financial shares of the businesses and platform members, is on agenda every year, the subsidy is provided as planned for the time being.

Despite the growth of food industry indicators evoked, to a big extent, by the preparation for an increase in prices due to a change to the VAT, the sensitivity of the liberal and globalized economies to external effects was confirmed last year. Continuing price fluctuations of commodities evoked not only by external effects in third countries but, in particular, by EU's own policy focused on a more and more extensive utilization of agricultural products for non-food use in the area of bio-fuels were accompanied by the growth of food price and will undoubtedly continue with all possible political and social impacts as can be noticed in north Africa and the Near East.

The development confirmed our priorities in the area of communication with consumers, which were focused on the support of a quality production or regional brands, and the justification of our endeavors for a legislative rectification of relationships with the trade and, in particular, for the transparency of margins and shares of individual parts of the chain in their distribution was confirmed. Paradoxically, positive impacts for Czech producers resulted in new food crises in Germany and newly in Poland and made customers be interested in the origin of goods and compare prices with possible risks.

In the future, it is crucial to continue strengthening the producers' innovation potential by increasing the share of food research and development in the total expenses for science and research, because it establishes the competitiveness of producers for the following period. With regard to the foregoing, our active role in preparation of a new Common Agricultural policy, the defending of subsidies specially intended for innovations in food products in the new program period, the strengthening of communication with consumers, and the keeping of fairer supplier-customer relationships seem to be completely crucial for the period to come.





“At present, the development of the food industry is difficult and is influenced, in particular, by external factors. The efficiency of the food production supported by the key areas significantly rose in the period before the economic crisis by which the Czech Republic was also struck.”

Hynek Strnad, Vice-president

Development of the Czech Food Industry

The sector of the production of food and beverages belongs, by its nature, to the supporting sectors of the processing industry as well as the in the whole European Union. Its significance is given, in particular, by the fact that it serves inhabitants' needs for food by processing an overwhelming part of the domestic agricultural production and producing health-friendly, quality, and, on a wide scale, available food. The prerequisite for achieving this goal is a permanent strengthening of the competitiveness of this sector.

At present, the development of the food industry is difficult and is influenced, in particular, by external factors. The efficiency of the food production supported by the key areas significantly rose in the period before the economic crisis by which the Czech Republic was also struck. Adverse impacts from the recession were reflected already during 2008 when the production evaluated practically stagnated and, in particular, the sales from own production and services in 2009 declined although the added value of this production was still growing. In the production of beverages, the consequences of the economic recession were also reflected in 2008 and, in particular, in 2009. During 2010, the crisis in the food industry continued and no desirable restoration took place. Compared to the other processing sectors, the impacts of the crisis could be seen within the production of food in completely different time curves characterized by high instability. The significant influential factors were the high rate of the globalization and related exports, the reduction of the consumption of food on the part of consumers, and the continuous pressure on the reduction of prices on the part of chains. In this connection, the dynamics of the development of the food industry required to achieve the necessary efficiency parameters within the competitive environment was not achieved and, on the contrary, there was further decline in the production. Principally, the investments in the production from own resources stopped growing, the employment reduced within the endeavor for cutting down expenses, and many enterprises did not recover their traditional markets. Despite increased partial subsidies from the state (KLASA, bio-food, regional food, etc.), a certain stagnation affected by the prognosis of further recession and the related economic instability in Europe continued in the food industry of the Czech Republic.

The following programs were intended for decisive subsidies of the development of the production of food products and beverages:

Direct Financial Subsidies

The volume of subsidies of CZK 889 million (preliminary data) provided in 2010 was CZK 141 million higher compared to the volume of CZK 748 million in 2009. The year-on-year increase in subsidies was drawn, in particular, within the Rural Development Program (RDP) and from the resources of the European Agricultural Fund for Rural Development (EAFRD), which corresponded to the actions adopted to add value to agricultural and food products. It principally concerned:

- Subsidies with the PRV and from the resources of the EAFRD – Action 1.1.3; it is an action for adding value to agricultural and food products. In 2010, the subsidy was CZK 476 million, of which CZK 357 million provided by the EU and CZK 119 million provided by the Czech Republic (preliminary data). In 2009, the subsidy was CZK 315 million, of which CZK 236 million provided by the EU and CZK 79 million provided by the Czech Republic.
- National subsidies within Subsidy Program 13 – support of the processing of agricultural products and the increasing of competitiveness of the food industry; they were subsidies making up 22.1 % of the acceptable expenses for the project (in 2010) compared to 25.0 % in the preceding year (2009). However, in 2010, the total volume of subsidies was CZK 180 million compared to CZK 158 million provided in 2009.
- Other expenses of the Ministry of Agriculture – Subsidies for the loans for investments within the ending programs Processor, Marketing Organization, and Hygiene; it concerns subsidies of interest on loans for investments paid by PGRLF to food enterprises when the beneficiary of the subsidy is a processor of agricultural products whose consumption of domestic agricultural products has exceeded 70 % of the total costs of raw material. In 2010, the subsidy was CZK 13 million (preliminary data), and in 2009, the subsidy was CZK 11 million.

- Programs for small and medium enterprises provided through CMZRB; it concerns subsidies with respect to the price-related advantaging of guarantees and to advantageous loans and contributions for the payment of interest on bank loans. In 2010, the subsidy was CZK 27 million while in 2009, it was CZK 56 million.

Indirect Supporting Programs

Indirect supporting programs are focused on the improving of the quality of goods as one of the significant prerequisites for the competitiveness of the agricultural production in the EU market. At the same time, they are accompanied by the education and promotion with the aim of convincing consumers of the advantages of quality domestic food produced through environment- and animal- friendly methods and food with a high nutrition value. The applied systems of the subsidy included:

KLASA Brand

On 31 December 2010, 1,329 products from 230 producers were marked with the KLASA brand. In 2010, 129 products from 51 producers were marked in total. In 2009 and 2010, subsidies of CZK 200 million were provided for marketing actions from the SAIF.

In terms of the research on the impact of the KLASA brand on consumers, it can be seen that food of the KLASA brand is preferred by most of the consumers addressed or makes their choices of food easier. Thanks to the KLASA brand, most of the respondents know that it makes sense to search quality food, and a half of the respondents is willing to pay more for food bearing this brand. Thus, a new phenomenon comes to appear in the selection of food when the freshness and quality are the most important and, then, the price of a product matters.

Development of the Czech Food Industry



Regional Food

In 2010, the project Regional Food was started up by the Ministry of Agriculture of the Czech Republic in cooperation with the Agrarian Chamber and the Federation of the Food and Drink Industries. Part of this project is also the newly created brand “Regional Food” successful local small and medium producers and agriculturists will be able to place on their products. This project strives to improve the consumers’ awareness of the regional food, refer to its tradition and quality, communicate the benefits brought by the regional food, strengthen its relations to the given region, and emphasize the advantages of consuming local food in relation to the development of a region and, thus, to the support of employment, tourism, etc. The costs of the information campaign were CZK 50 million.

In 2010, 318 producers with 927 products participated in the first year of the project in individual regions and applied for prizes in the categories of milk and dairy products, bakery and confectionery products, fruit and vegetable, hard and soft drinks (save for wine), meat products, and other food products. The regional steering committees always select one product, the winner in each category. The right to use the brand “Regional Food” was awarded to 71 products in 2010

Marking of Products Related to a Particular Territory – geographical indications

Within the protected indication of the origin, the protection was awarded to the following agricultural products and food at the end of 2010:

Českobudějovické pivo, Český kmín, Budějovické pivo, Chodské pivo, Budějovický měštanský var, Chamomilla Bohemica, štramberské uši, Všestarská cibule, žatecký chmel, České pivo, Pohořelický kapr, Znojemské pivo, Karlovarský suchar, Mariánskolázeňské oplatky, Hořické trubičky, Brněnské pivo, Starobrněnské pivo, Lomnické suchary, Břežnický ležák, Třeboňský kapr, Černá Hora, Pardubický perník, Jihočeská Niva, Nošovické kysané zelí, Jihočeská Zlatá Niva, Olomoucké tvarůžky.

Moreover, the following products strived to obtain the geographical indication protection: Karlovarské oplatky, Karlovarské trojhránky, Chelčicko-Lhenické ovoce, Lavašský frgál.

The protection “guaranteed traditional specialty” was obtained for the following traditional specialties in cooperation with the Slovak Republic: Spišské párky, Lovecký salám, špekáčky, and Liptovský salám.

Other traditional specialties striving to be awarded the protection are: Pomazánkové máslo and Pražská šunka.



Evaluating the food industry from the perspective of economic indicators, its whole production in 2010 was 268 billion crowns compared to 281 billion in 2009. According to this production, the food industry in the Czech Republic belonged in 2010 amongst the key sectors of the processing industry although the adverse development of efficiency of the crisis year of 2009 continued in the sector evaluated in the year stated.

In total, the processing industry of the Czech Republic recorded a year-on-year increase by approximately 13 % in the sales of own products and services at usual prices in 2010, in particular, by the influence of sectors focused on the foreign demand. However, the production of food and beverages focusing, predominantly, on the domestic market belonged amongst the 9 sectors (out of 14 within the processing industry) which fell behind in 2010. The share of the production of food and beverages in the processing industry dropped to 8.2 % in 2010 (it was 9.8 % in 2009).

Evaluating the sales of own products and services in the production of food and the production of services in enterprises with 50 and more employees in 2010, we must state that they declined on a year-on-year basis. The decline was 5.4 % and the sales reached CZK 212.3 billion (of which CZK 159.0 billion in the production of food and CZK 53.3 billion in the production of beverages). The main cause of the decrease in sales was a decline in industrial producer prices of food products by 2.2 % on average and industrial producer prices of beverages by 1.5 %. On a year-on-year basis, industrial producer prices rose only in dairy products (by 6.2 %) under the influence of a considerable increase within the last months of the year evaluated.

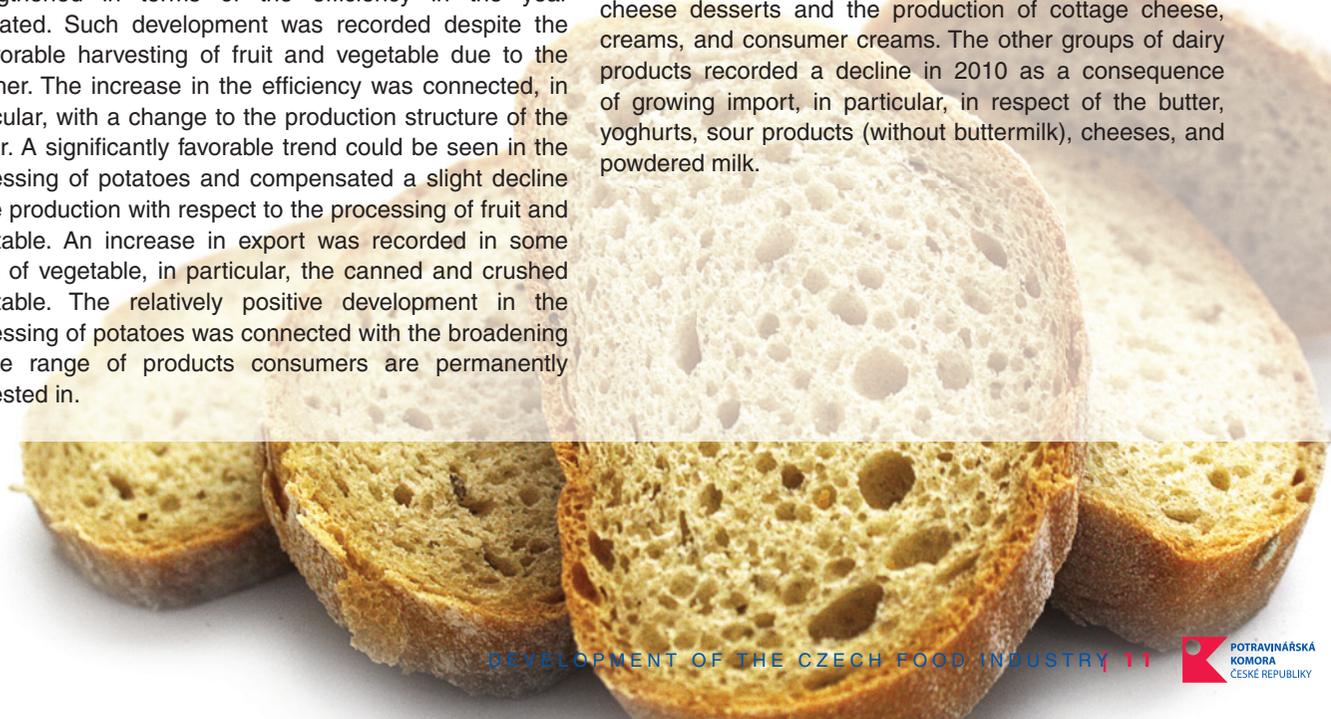
The situation in individual production sectors represented by sets of enterprises with 50 and more employees developed as follows during 2010:

The production of meat and meat products kept its key position within the food industry. However, in terms of the efficiency, it strongly weakened on a year-on-year basis. The decline was caused, in particular, by a decline in industrial producer prices of meat and meat products with respect to products on the low price levels. Imported meat and meat offal, in particular pork one, were also used in the production to a considerable extent. The efficiency worsened, in particular, in the processing of meat, which was not fully in line with the increase in the production of meat products.

The processing of fruit, vegetable, and potatoes strengthened in terms of the efficiency in the year evaluated. Such development was recorded despite the unfavorable harvesting of fruit and vegetable due to the weather. The increase in the efficiency was connected, in particular, with a change to the production structure of the sector. A significantly favorable trend could be seen in the processing of potatoes and compensated a slight decline in the production with respect to the processing of fruit and vegetable. An increase in export was recorded in some kinds of vegetable, in particular, the canned and crushed vegetable. The relatively positive development in the processing of potatoes was connected with the broadening of the range of products consumers are permanently interested in.

In the year under evaluation, the efficiency of the production of vegetable and animal fats and oils significantly weakened on a year-on-year basis due to a decrease in industrial producer prices from the perspective of the whole year. Nevertheless, it must be stated that in the last months, they have been growing as a consequence of changes (narrowing) in the production base of the sector.

In 2008, the production of dairy products got into the recession and continued developing adversely in 2009; in 2010, it was restored and its key position in the sector structure strengthened. Industrial producer prices of dairy products also rose considerably as a consequence of a 1.8 % smaller volume of the milk bought, the promotion of milk vending machines, that is, the yard sale, and higher acquisition prices of milk. An increase in the volume of the production was achieved by the production of cottage cheese desserts and the production of cottage cheese, creams, and consumer creams. The other groups of dairy products recorded a decline in 2010 as a consequence of growing import, in particular, in respect of the butter, yoghurts, sour products (without buttermilk), cheeses, and powdered milk.



Development of the Czech Food Industry

In 2010, the production of mill products and products of starch manufacturing, where the production of mill products prevailed, recorded another decrease in the efficiency. This development was connected with a year-on-year decline in the harvesting of cereals, their uneven quality, and a decrease in the production of potato starch. Furthermore, the weak efficiency was affected by the overall decline in industrial producer prices although a slight increase was recorded at the end of the year. The reason for the decline in sales was a significant reduction of industrial producer prices in connection with the decline in prices of cereals. Thus, this aggregation failed to keep the previous position in the sector structure.

The production of bakery, confectionery, and other flour products in the year under evaluation succeeded, more or less, in keeping its efficiency on a year-on-year basis despite the significant decline in industrial producer prices of pastry and confectionary products. It related, in particular, to the ordinary pastry, but in the sales, the decline was replaced with a higher production and, in part, with a wider range of products.

In its quite a wide internal structuring, the production of other food products slightly lost its efficiency on a year-on-year basis. In this group of products, the production of finished meals (of meat, fish, vegetable, frozen, and permanent pizzas) strengthened the most, including meals of the regional or national cuisine and other food products not included elsewhere (soups and broths, sandwiches, cheese pizzas, etc.), including the yeast, egg products, etc. However, the decrease in the efficiency in processing tea, coffee, spice, and aromatic extracts prevailed. However, the stagnation, that is, the slight decrease, was reflected in the yet bearing productions of this group, that is, the production of sugar and the production of cocoa, chocolate, and confectioneries, which affected the year-on-

year development of the whole group the most. Thanks to its efficiency, this aggregation of productions still belongs among the biggest food sectors and strengthened its position in the food industry with regard to the negative development of the efficiency.

The production of finished forage practically stagnated on a year-on-year basis measured according to the sales. The reason for this was a decline in the industrial producer prices of forages with respect to all main kinds of feeding mixtures over the year and the gradual growth during the year evaluated. Similar trends connected with the stagnation were also reflected both in industrial forages for farm animals, which are decisive for this production, and in industrial forages for animals in the business-oriented breeding.

Measured according to the sales, the production of beverages recorded a relatively strong decline in its efficiency on a year-on-year basis, which was connected with a decrease in the industrial producer prices of beverages. The production of beer, being the decisive component of the group, has been decreasing for the third year in a row. It related, in particular, to draft beer and bottled beer, beer in barrels and tins. Only the beer in PET bottles comes to widen its position in the market. The unfavorable development in the production of beer was connected with growing import and, lately, with an increase in the excise tax at the beginning of the year evaluated. However, the range of special beers extended. In 2010, the production of malt declined and the number of active malt houses reduced on a year-on-year basis.

In the year evaluated, a decline could also be seen in non-alcoholic drinks and the bottling of mineral water and drinking water. An even more significant decrease in the year under evaluation was recorded by the production of liquors, including their distillation and rectification where the

main reasons for such state were the stocking up required by the distribution due to a change to the excise tax, which was adversely manifested by a failure of the production and sale of liquors in the year evaluated, and the lack of raw material in a fruit crop failure. Neither did the efficiency increased with respect to the production of wine owing to an unfavorable year for this commodity. On a year-on-year basis, one third less wine grapes with lower sugar contents were harvested. However, wine producers paid special attention to the quality of wines, which was awarded not only in national, but also international competitions. The negative trade balance with wine even deepened on a year-on-year basis. A national subsidy was provided to increase the competitiveness and promote wine.

With regard to the significant decline in the share of sales (decline in the amount of beer produced and the production of malt), the whole group of the production of beverages failed to keep its position in the sector structure.

In 2010, the food industry employed 107 thousand workers in total compared to the 115 thousand workers in 2009. Thus, there was a decrease in 8 thousand workers on a year-on-year basis. This fact fully reflected not only the permanent decline in the food industry production, but also the enterprises' endeavor to reduce expenses and enhance the productivity of work with the aim of reducing expenses as a response to the supply chains' pressure on keeping prices as a consequence of the rising costs of material. The total decline in labor force is not nation-wide and is uneven in individual sectors. The biggest decline was recorded by the sector of the production of vegetable and animal fats and oils by 52 %, the production of beverages by 7.2 %, and the production of bakery, confectionery, and other flour products by 4.4 %, and, on the contrary, there was an increase by 6.7 % of workers in the production of other food products.

A still life photograph of food products. In the foreground, a glass of white wine is partially filled, sitting on a wooden surface. To its left are several blocks of cheese, some with holes. To its right are two red apples. The background is a soft-focus green, suggesting an outdoor setting. The lighting is bright and natural, highlighting the textures of the food.

Unlike 2009, there was a considerable decrease in the number of workers in other unnamed areas. The most significant production group in terms of the employment was, again, the production of bakery, confectionery, and flour products. In 2010, its share was 30.1 % (32,227 workers) in the total number of workers in the food industry. The second most significant area was, with regard to the number of employees, the production of meat and meat products with a share of 20.7 % (22,177 workers).

In terms of the production structure, the entrepreneurial base of the food industry is made up by 7,456 entrepreneurial entities. The existing statistics shows that since 2005, this base has been extended by 817 entrepreneurs. The biggest number of companies is included in the production of bakery, confectionery, and other flour products, the processing and preservation of meat and meat products, and the production of other food products. However, the absolute increase in entrepreneurial entities does not prove growth of the food industry. In principle, it is affected by the growth of the number of entities in the production of beverages and other food production. On the contrary, the other production areas record a permanent decline associated with the decline in the employment. Same as in 2009, the highest efficiency was achieved by the category of enterprises with 200 up to 499 employees. However, on a year-on-year basis, there was a slight decline in sales with respect to this category compared to others where the decline was deeper.

In 2010, the export of agrarian commodities reached 73.9 billion crowns. Thus, on a year-on-year basis, the negative trade balance in the trade in food products was reduced from nearly -34 billion Czech crowns to -30 billion Czech crowns, that is, nearly by 4 billion Czech crowns. However, based on the statistics, most groups of products showed a negative trade balance with respect to foreign trade, just in the area of dairy products the trade balance was positive in 2010 although it dropped slightly.

Nevertheless, a permanently positive trade balance was achieved by the group of beverages, in particular, thanks to the competitiveness of beer and malt. On the contrary, wine remained to be a significant import commodity. However, in 2010, the positive trade balance in the group of beverages was decreased on a year-on-year basis, in particular, under the influence of declining export. In this respect, some territories, in particular, in third countries remained unused.

From the territorial perspective, countries neighboring upon the Czech Republic, which are members of the EU, belonged amongst the main export destinations in 2010 in relation to food. Nearly a third of the export was headed for Slovakia (32 %). Another country with a high share of food export was Germany (16 %). For other individual countries, the share in the export of food from the Czech Republic was less than 10 % in the period evaluated. Nearly the same share was achieved by Poland (9 %). In terms of the import to the Czech Republic, the highest share in 2010 was achieved by Germany (28 %), Poland (18 %), and Slovakia (8 %).

Development of the Czech Food Industry



In 2010, Slovakia was the main export territory with a share of 29 %, while the share of Germany was 16 % and the share of Poland was 15 %. In the year stated, Italy was a significant importer to the Czech Republic with respect to beverages with a share of 14%, followed by Slovakia with a share of 13 % and Germany with a share of 11 %.

Out of the import of CZK 102.2 billion, the biggest share of 28 % is attributable to Germany in the production of food, followed by Poland with a share of 18 % and Slovakia with a share of 8 %. In the trade perspective, the biggest share in import can be ascribed to the group of the production of other food products and, on the contrary, the smallest share in the turnover can be ascribed to import from the group of the processing and preservation of fish and fish products.

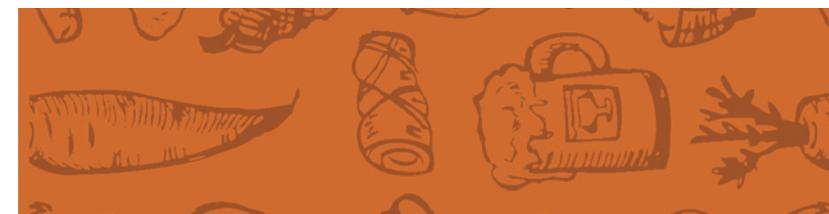
Thus, the Czech Republic comes to become a country dependent on import in the area of food although it has a sufficient raw material background in most agrarian commodities and processing capacities. On one hand, this status shows the need for increasing the competitiveness of products by enhancing their quality continuously. On the other hand, it is necessary to enhance not only the efficiency of systems of indirect sale subsidies from the state, but also the efficiency of checks by state supervision bodies with the aim of preventing the import of cheap poor-quality and, in many cases, health jeopardizing food within the supplier chain, which do not correspond to EU standards, and setting the same conditions of competition in the common market of the European Union.

In the international comparison in terms of further development of food productions, it would be desirable to enhance the dynamics of growth of the added value. Furthermore, it is necessary to reduce the number of employees, in particular, in big enterprises and increase

not only the level of the productivity of work, but also the competitiveness within the EU. It will also be suitable to make use of opportunities in the foreign trade in relation to third countries more efficiently.

In any case, from the perspective of the food industry, it is necessary to continue fulfilling the strategic goals of the food policy concept even though most parts of that document are obsolete and it will be necessary to update it in connection with the newly arising conditions. However, it permanently applies that actions strengthening the competitiveness and efficiency of this sector should be preferred. The unfavorable state is confirmed by the growing trend of importing food to the Czech Republic.

The food industry must continue being oriented, in particular, on the development of high-quality products with high added value. The innovation process connected with new technologies and quality raw material must be intensified. This trend must rely, in particular, on results of applied research and development for which it will be indispensable to create the necessary resources in the prospects of the state and corporate budgets. New products must not only comply with the demand, but, in particular, must have a positive impact not only on public health, but also on the overall quality of life. For food enterprises of any category, it means focusing the production on higher phases of the processing of agrarian commodities, such as bio-food, and on the production with a higher biological value.



However, within the concepts and development plans prepared, it is necessary to realize that the gradual limitation of available labor force is another factor that can have a negative impact on the competitiveness of the food industry. In this connection, a lack of qualified labor force can be expected due to the continuing outflow of students applying for a job in sectors that are perceived as less perspective. With regard to the average wage, the food industry and the production of beverages belong amongst such sectors.

Within the preparation of an amendment of the concept of the development of the food industry on the state level, it is indispensable to come from the situation that the status of the food industry is significantly affected by consequences of the economic crisis. It can be expected that the crisis and economic instability will influence the total volume of the consumption of food and strengthen the demand for cheaper kinds of food. The reduction of sales will lead, in particular in the food industry, to the implementation of other saving measures focused on increasing the productivity and saving labor force. In the long term, other factors will affect the development of the sector as well. The expected decline in the number of inhabitants will lead to a reduction of the absolute consumption of food and, at the same time, the decline in growth of the living standard will not lead to the growth of consumer demand in terms of the quality. The productivity of work will grow simultaneously with the technological level getting better.

The demand for qualified labor force will rise, on one hand, but, on the other hand, the absolute number of workers will drop. New trends will be accompanied by growing requirements for the expertness and the demand for specialists will be increased. In terms of the prospect of the Czech food industry within Europe, a strong jeopardy by external factors can be expected (the establishment of new economies – China, India, growing competitiveness of states with low costs, the deepening globalization, etc.).

If no feasible and effective corrective measures are proposed within the preparation of prospects for the food industry to make it go the right direction, improve its innovation abilities, and create equal conditions in the domestic and foreign markets, the conditions for doing business in this sector will considerably worsen. With regard to the size and significance of this sector, this fact will have serious effects on the Czech economy. The experience from EU countries shows that this situation can be prevented by a substantial subsidy from the state in the area of research, development, and diet policy connected with an increase in the quality of life and the orientation on products with high added value. For this reason, this trend is also strongly supported by the Federation of the Food and Drink Industries of the Czech Republic not only within its day-to-day activity, but, in particular, by creating and supporting the Czech Technology Food Platform.



Production of Selected Products

Data

Food Products and Beverages	Measurement Unit	2006	2007	2008	2009	2010
Fresh or chilled beef	t	66 036	55 359	57 947	55 278	60 735
Fresh or chilled pork	t	312 355	253 187	238 377	227 687	231 923
Fresh or chilled poultry	t	82 112	87 766	63 875	53 619	50 471
Frozen poultry	t	27 325	21 623	21 989	13 482	13 842
Modified and canned potatoes	t	54 985	48 352	63 966	111 584	114 927
Frozen vegetable	t	17 042	28 409	27 424	22 131	13 016
Jams, jellies, marmalades	t	31 695	31 894	29 798	34 582	35 843
Milk and creams with up to 6 % fat content	thousand l	683 272	700 786	775 047	802 423	763 029
Milk and creams with more than 6 % fat content	thousand l	36 590	36 877	36 105	37 080	47 102
Butter	thousand l	51 983	52 516	43 615	41 719	37 607
Cheese and cottage cheese	t	145 438	136 205	124 799	122 609	134 466
Sour dairy products	t	199 414	213 307	212 661	237 364	222 927
Wheat flour	t	821 802	764 122	720 446	709 797	744 929
Fresh bread	t	338 016	312 693	341 281	306 657	288 962
Ordinary fresh pastry	t	285 752	274 788	290 154	303 728	321 618
Confectionery	t	61 191	61 728	48 320	48 195	41 445
Refined sugar	thousand l	492	383	418	444	446
Uncooked, stuffed, or in other way unprepared, pasta	t	48 474	55 091	58 855	66 347	84 227
Distilled liquors, liquors, and other alcoholic drinks	thousand l	56 487	58 793	(17 968)	(23 227)	(16 854)
Wine of grapes, save for sparkling wine, wine juice	thousand l	56 733	59 819	50 204	47 995	46 278
Beer	thousand l	20 134	18 627	19 213	18 053	16 738
Mineral water and soda without additives	thousand l	799 527	755 582	812 943	795 660	800 024
Other non-alcoholic drinks	million l	2,001	1,354	2,147	1,838	1,842

Note: (...) recalculated to 100 % of absolute alcohol

Export & Import of Products by Individual Sectors (most significant destinations)

Data

Export of Selected Types of Goods

Type of Goods	2008		2009		2010	
	Country	mil. CZK	Country	mil. CZK	Country	mil. CZK
Wheat	Germany	2 877 mil. CZK	Germany	4 598 mil. CZK	Germany	3 164 mil. CZK
Milk and milk products (excl. cheese)	Germany	4 745 mil. CZK	Germany	3 626 mil. CZK	Germany	3 983 mil. CZK
Vegetable	Slovakia	1 373 mil. CZK	Slovakia	1 445 mil. CZK	Slovakia	1 810 mil. CZK
Butter and other milk-derived fats	Germany	378 mil. CZK	Germany	284 mil. CZK	Germany	152 mil. CZK
Sugar	Austria	1 145 mil. CZK	Austria	673 mil. CZK	Austria	853 mil. CZK
Fresh eggs and yolks	Slovakia	80 mil. CZK	Slovakia	133 mil. CZK	Slovakia	157 mil. CZK
Honey	Germany	30 mil. CZK	Germany	41 mil. CZK	Germany	31 mil. CZK
Beef	Slovakia	165 mil. CZK	Slovakia	161 mil. CZK	Slovakia	167 mil. CZK
Beer	Germany	1 277 mil. CZK	Germany	1 327 mil. CZK	Germany	1 028 mil. CZK

Import of Selected Types of Goods

Type of Goods	2008		2009		2010	
	Country	mil. CZK	Country	mil. CZK	Country	mil. CZK
Non-alcoholic drinks	Slovakia	851 mil. CZK	Slovakia	849 mil. CZK	Slovakia	753 mil. CZK
Fish incl. crustacean	Vietnam	507 mil. CZK	Vietnam	668 mil. CZK	Vietnam	543 mil. CZK
Rice	Italy	637 mil. CZK	Italy	603 mil. CZK	Italy	548 mil. CZK
Spice	Spain	64 mil. CZK	Spain	64 mil. CZK	Spain	61 mil. CZK
Tea	Poland	110 mil. CZK	Poland	120 mil. CZK	Poland	123 mil. CZK
Vegetable and animal fats	Germany	1 743 mil. CZK	Germany	1 444 mil. CZK	Germany	1 127 mil. CZK
Cocoa	Holland	756 mil. CZK	Holland	718 mil. CZK	Holland	972 mil. CZK
Vegetable	Spain	1 650 mil. CZK	Spain	1 837 mil. CZK	Spain	2 056 mil. CZK
Fruit and nuts	Spain	1 878 mil. CZK	Spain	1 856 mil. CZK	Spain	1 752 mil. CZK
Unroasted coffee	Brazil	228 mil. CZK	Brazil	218 mil. CZK	Brazil	312 mil. CZK
Alcoholic drinks	Italy	1 095 mil. CZK	Italy	1 134 mil. CZK	Italy	1 177 mil. CZK

Legislation 2011



“Discussions on the form of new rules for indicating food came to an end ...”

*Markéta Chýlková,
Head of the Legal Department of the FFDI CR*

The year of 2011 was accompanied by discussions on the final form of the proposal for a regulation on the communication of information on food to consumers and discussions on the form of the European list of general health claims. The future European legislation stipulating uniform rules for indicating food became real and producers started to understand that the final text would not be perfect and that it would be difficult for them to interpret the rules.

The domestic legislative environment in 2011 was influenced by two fundamental topics again – the discussion on the future of the Act on a Significant Market Power and, unfortunately, the inability of the Ministry of the Environment (ME) to submit an amendment of the Packaging Act to the public. Last year, the topic relating to the Act on a Significant Market Power remained under a strong pressure of commercial lobbies, but the legislative work connected with the amendment of the Act indicated clearly that the Act would not be cancelled completely and the state before 1 February 2009 would not be restored. In May, the Office for the Protection of Competition started public consultations with respect to a proposal which, on one hand, supported the cancellation of the Act on a Significant Market Power, but the regulation of supplier-customer relationships should have been preserved by embedding basic principles in the Act on the Protection of Competition. The analysis prepared by the Economic University and so often and gladly highlighted by the Trade and Tourism Association of the Czech Republic in its arguments proved to be definitely surpassed and, to a certain extent, misleading. It described catastrophic scenarios of impacts of the adoption of the Act on a Significant Market Power on suppliers and consumers. However, after two effective years of the Act, it was possible to demonstrably state that it had been unprofessional, tendentious, biased, and practically none of its conclusions had come true.

In the interdepartmental public consultation, the submitter of the amendment (Office for the Protection of Competition together with the Ministry of Industry and Trade of the Czech Republic) based the amendment on the principle of an abuse of the competitors' significant economic position; in the refutable speculation of its existence, the limit was increased to 10 billion (supported, among other things, by the submitter's own study). It was proposed that in the future, the regulation would relate to both parties entering into supplier-customer relationships. However, the Government's legislative council failed to support the proposal and, for this reason, discussions on the amendment were postponed. Despite the big expectations on the part of the industry, the ME did not introduce any final form of the amendment of the Packaging Act which had been the target of criticism in connection with the creation of an authorized packaging company's reserve fund and the increasing of its equity, which would mean a clear increase in fees for all entities involved in the system of collective performance, since the Ministry started to work on it. At the end of the year, the council for the environment of the FFDI CR started concentrating on another packaging-related topic, being a possible change to the method of pricing of the collective performance. By the end of the year, the ad hoc working group composed of the representatives of associations, unions, and sections of the FFDI CR and established for the purpose of discussing the issue did not arrive at the conclusion that there should be any change to the method. The discussion was undermined by the fact that no amendment of the Packaging Act had been submitted so far and, thus, it is not clear what recycling goals up to 2020 there will be.



Legislation in the European Context

„The industry will be looking for a suitable interpretation of the new rules on food indications ...”

Although it was expected that by publishing the regulation on the communication of food information to consumers in the Official Bulletin of the European Union, producers of food and beverages would have less work, the truth was different. The text published evoked discussions on the interpretation of some provisions and, in particular, on whether it would be even possible to mark food according to those rules before the regulation came into force (December 2014).



Claims

The European Commission completed its work on the future European list of permitted health claims under Article 13 paragraph 1 and submitted the final text including only 222 claims (out of 4,200 ones submitted for approval) to the Standing Committee on the Food Chain and Animal Health which approved it and, thus, the future of the list approved rested only on the European Parliament at the end of the year. However, the European Parliament was not expected to be interested in extending the state when it was not clear what health claims under Article 13 paragraph 1 were and were not permitted any longer and would agree with the list.

The same way was the European Parliament submitted a proposal for modifying the list of nutrition claims where, in particular, the industry showed interest in the new claims “it contains x % less” and “without added salt / sodium” being permitted. The former of these claims was like a thorn in the eye of the European Parliament due to a possible deception of consumers and, therefore, was not approved by it. For this reason, the industry will have to wait for a new claim relating to the added salt or sodium.



Do You Know how to Mark Your Products?

The year of 2011 was connected with the discussion on the final form of the proposal for a regulation on the communication of food information to consumers. The FFDI CR was in touch with the representatives from the Ministry of Agriculture of the Czech Republic responsible for dealing with the proposal in individual phases of the dealings within a dialogue. Besides the mandatory nutrition indications, in particular, the absence of exceptions to the mandatory size of letters when only the biggest area of the packaging was enlarged seemed to be a fundamental problem. The FFDI CR actively defended the view that there should be no minimum size of letters set for small packages at all. Among other things, in connection with discussing the proposal, the discussions relating to Aspartam were restored. The ENVI Committee within the European Parliament approved an amending proposal which would order producers, if they used Aspartam, to indicate this fact and complete the information that such food could jeopardize pregnant women (e.g. "Not intended for pregnant women, the consumption may affect fetus development"). However, the proposal was turned down. In the autumn, it was apparent how the final text would look like – in November, the regulation was published in the Official Bulletin of the EU. Hence, the European food and drink industry will be made, in the three years to come, to accept some essential changes relating to the indication of food.

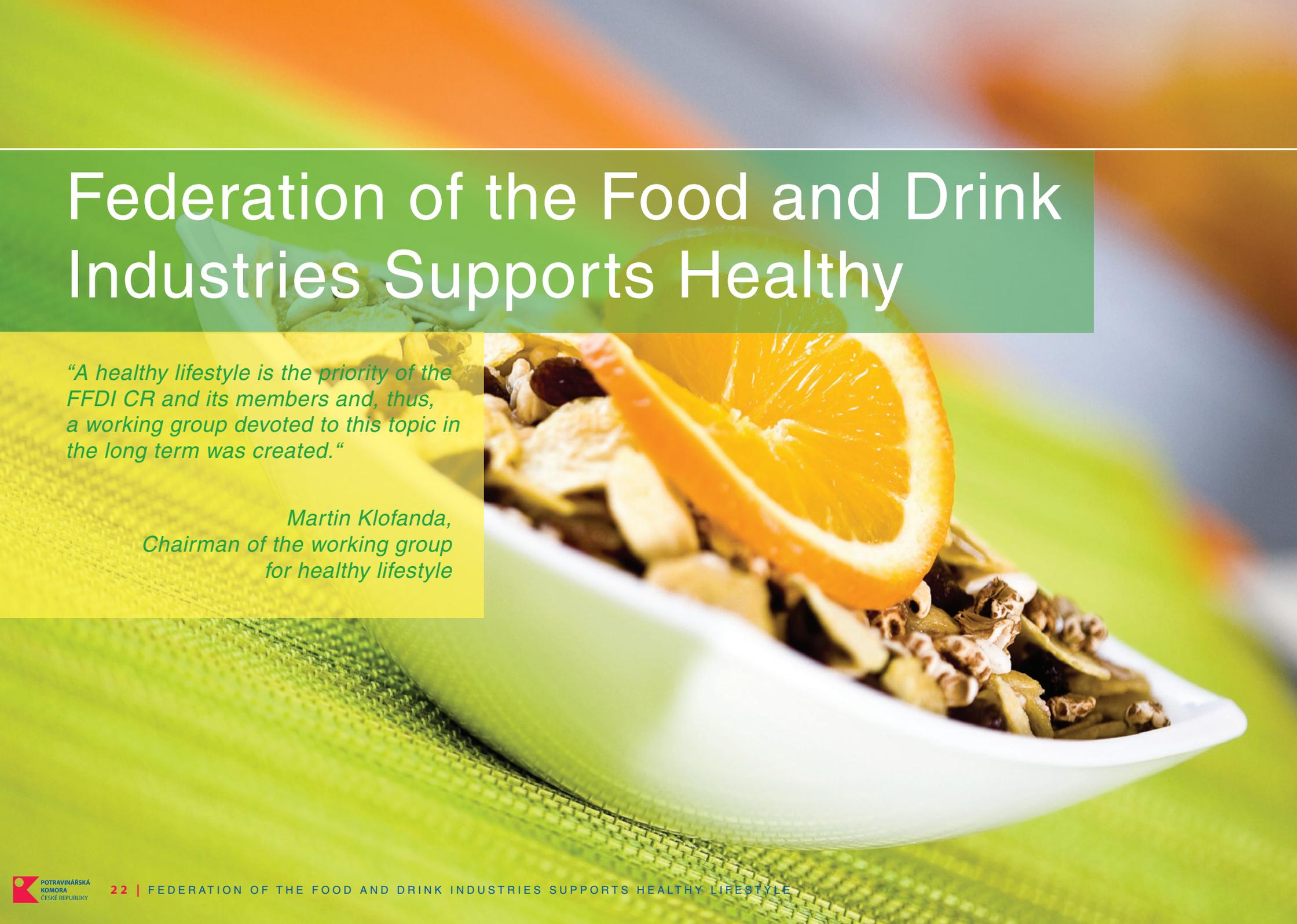
For the mandatory nutrition indication, the regulation sets a five years' transitory period but, thereafter, the indication of nutritive values will be binding upon everyone. However, many provisions of the regulation are questionable and ambiguous and their interpretation differs. Thus, the basic question arose whether it was even possible to apply the regulation sooner.

Already at the time of publishing the regulation in the European Bulletin of the EU, the industry declared its interest in finding suitable interpretation rules that should help producers apply the regulation in the practice continuously during the whole transitory period. Both within the Confederation of Food and Drink Industries Producers of the EU and within the FFDI CR, producers started discussing the interpretation of the text and called on the authorities to cooperate.

However, the industry must wait for further development by the next year.



Federation of the Food and Drink Industries Supports Healthy



“A healthy lifestyle is the priority of the FFDI CR and its members and, thus, a working group devoted to this topic in the long term was created.”

*Martin Klofanda,
Chairman of the working group
for healthy lifestyle*

A healthy lifestyle is the priority of the FFDI CR and its members and, thus, a working group devoted to this topic in the long term was created.

The working group for healthy lifestyle was established in 2007 and associates the representatives of industrial enterprises and several professional associations. At present, it is headed by Ing. Martin Klofanda from Kofola, a.s. Close cooperation is established with the Working Group for Healthy Lifestyle attached to the Czech Technology Food Platform headed by prof. Derflerová Brázdová from the Medical Faculty of the Masaryk University in Brno.



The working group has been supporting the Internet course “Easily Live Healthily” for four years. The course is intended, in particular, for five-grade pupils at elementary schools. Its goal is to encourage the right eating habits and increase the children’s movement activity. Its exceptionality consists in connecting theoretical knowledge with practical knowledge. Another advantage is an immediate feedback received by pupils thanks to the Internet. The project is conceived as a competition for school classes and is popular both with pupils and their teachers. Within five years, the course was attended by more than 30,000 children from the whole Czech Republic.

The fifth year brought much news. The main news was the modification of the practical part of the course so that it could be more attractive and beneficial to children. Moreover, the cooperation with new partners thanks to whom pupils and their teachers could be awarded prizes was established. The last news was a start-up of the course in Slovakia. The first year of the Slovak version of the competition “Easily Live Healthily” was commenced in February 2012. The sixth year of the competition “Easily Live Healthily” will be started up in the Czech Republic at the beginning of September 2012.

The second significant activity pursued by the Working Group for Healthy Lifestyle is the support of the voluntary nutrition indication GDA. This topic is communicated on several levels. The GDA indication is primarily intended for end consumers and is to provide them with simple and clear information on the respective product (that is, on the share of one portion of the relevant food in the daily recommended amount of energy and nutrients). The other communication groups are the professional public, media, food producers, and the representatives of state institutions. The websites www.gda.cz and www.nutricnibublina.cz were created for better communication with all groups and several press conferences, a day with GDA at two ministries, a targeted promotion on the television, radio, in magazines, and on the Internet were implemented. In 2011, research relating to the marking of food took place amongst consumers along with the research amongst members of the Federation of the Food and Drink Industries of the Czech Republic relating to the knowledge of GDA and the use of such indication on products.

The new project the working group has been devoted to since last year focuses on the healthy lifestyle in high school students. In this area, the FFDI CR cooperates with experts from the Faculty of Recreation of the Palacký University in Olomouc. The goal of the project is to attract teenagers, provide them with sufficient quality information in the area of diet, movement activities, and regeneration, and motivate them to change their behavior. Following the example of the “Easily Live Healthily” competition, it should be a competition amongst school classes. The first year of the project is planned for this autumn.

In the area of healthy lifestyle, the Federation of the Food and Drink Industries of the Czech Republic supports the Obesity Post-gradual Training intended for physicians and pediatricians, cooperates with the Association for Diet, participates in professional conferences, etc.



Communication and External Relationships

“The Federation of the Food and Drink Industries of the Czech Republic regularly notifies both the media and the professional and unprofessional public of its activity, standpoints, opinions, and views.”

*Dana Večeřová,
Head of the Department for Communication and External Relations*



The Federation of the Food and Drink Industries of the Czech Republic regularly notifies both the media and the professional and unprofessional public of its activity, standpoints, opinions, and views.

In 2011, the quality of information flows inside and outside the FFDI was improved, in particular, in relation to relevant public administration institutions and control bodies. Thanks to the extended content of the Federation's official websites (www.foodnet.cz), the improvement of their promotion, and the entering of updated information, the number of their visitors was growing. A higher visitation rate was also recorded on the webpage of the Czech Technology Food Platform (www.ctpp.cz) and on the webpage of the daughter company of the FFDI CR FOODSERVIS, s.r.o. (www.foodservis.cz).

The news on the activity, seminars, and events of the FFDI CR and press reports and standpoints are regularly published in the media focused on the food industry (Svět potravin, Moderní obchod, etc.) and in the expert weeklies Euro, Ekonom, in dailies, and news televisions.

In 2011, 25 press reports were issued and reacted to the current affairs in the food sector. Every year, the FFDI CR is cited in the Czech News Agency's reports approximately 80 times, which is more than once a week; with respect to the other media, the annual citing rate is on the level of 500-600 citations. The Federation's representatives annually participate in more than 50 events, television interviews, radio interviews, conferences, or seminars where they present opinions and standpoints of the Federation of the Food and Drink Industries of the Czech Republic.

The issuing of the magazine Svět potravin supported by the FFDI CR continued. It is a monthly focused on supporting Czech food products, the main goal of which is to motivate consumers to prefer Czech food products and orientate better in the wide range of food products.

Another goal is to notify (in cooperation with the SAFI) of problematic food and help consumers assert their rights. In relation to food entities – the goal is to enable members of the FFDI CR the presentation with emphasis on a high rate of added value of their products for Czech consumers. Last year, the design of the magazine was updated as a response to the readers' requirements, the number of subscribers is rising, and communication with the community of readers, which formulates its requests for the content of the magazine through the communication on the magazine's webpage, is getting better. A great success was the inclusion of the We Have Tested For You section focused on chemical physical and sensory tests of food.

Concerning the presentation at events, the FFDI CR participated in the international agricultural and food trade fair Země živelka in Ceske Budejovice from 25 August to 30 August 2010. The Federation's exposition was conceived as open both for members and those interested in the issue of food. Same as in the past years, the degustation of products of our members who were lent the KLASA brand and regionally awarded products took place at both events. The news was the presentation of products bearing the logo Czech Product – guaranteed by the Federation of the Food and Drink Industries within a new project of the support and promotion of quality Czech products. Furthermore, in the festive opening of the exhibition Země živelka, other producers took over certificates authorizing them to use the logo. Of course, we are prepared to continue presenting our members in this form on various occasions.



„Potravinářská komora České republiky byla i v roce 2011 zapojena do projektů 7. rámcového programu a EAFRD, Programu rozvoje venkova ČR“

Šarka Štejnarová, Head of the Administrative and Economic Department



PROJECTS

of the Federation of
the Food and Drink
Industries



EU - SUBSIDIZED PROJECTS

SEVENTH FRAMEWORK PROGRAM

No. 218423-2

Development of the most suitable structure and way of processing stuffed chocolate confections in the highest quality (ProPraline)



<http://www.sik.se/propraline/>

The discovering of causes and limitations of the creation of cracks and fat blooms on the surface in the production of stuffed chocolate confections, the publication of a handbook identifying critical points of the production and their prevention, recommendations, and the presentation of the new knowledge, including the outputs from training courses, belong, by virtue of the coordinator's and partners' set goals, amongst the indicators that are continuously fulfilled within the project.

Besides the promotion of knowledge, experience, and results from the project, the FFDI CR also directly participated in the organizing of the first two days' training course for producers of chocolate confections in eastern, northern, and central Europe together with the Swedish and Belgian associations of producers of chocolate confections (CHOKOFA, CHOPRABISCO). In connection with the Institute of Chemical Technology Prague (Institute of the Chemistry and Technology of Carbohydrates), two educational courses were held in Prague for domestic producers and introduced both theoretical and practical results coming from the consumer research and relevant research activities within the whole project. Alongside the FFDI CR, the project was also participated in by CARLA s.r.o. from Dvůr Kralove nad Labem.

No. 266486

New dietary strategies addressing elderly population for the benefit of a healthy aging in Europe (NuAge)

The big integrated project submitted by the University in Bologna, where the consortium SP.E.S. GEISE is the partner, constitutes participation of the FFDI CR in 31 entities, being national food and beverage federations, entrepreneurial entities, tertiary education institutions, and research organizations. Thanks to the long-term cooperation with the consortium SP.E.S. GEISE, the FFDI CR succeeded in arranging the partnership for Zeelandia, spol. s.r.o. The five years' project was started up on 1 May 2011 and its budget was more than 12 million euro. In the lapsed period, the first collection of data on dietary habits of the elderly population 65+ took place and a platform of industrial enterprises making up the base for transferring knowledge and the feedback was created.



PROJECTS of the Federation of the Food and Drink Industries

No. 285820

Innovative packing system with the decontamination ability for the fresh production of fruit and vegetable within the meaning of the alternation of chlorine disinfection (Safe-bag)

The seven years' project 7.R.P.EU from the category Research for the Benefit of MSP Associations Safe Bag consists of an eleven members' consortium headed by the Spanish institute IRIS (Innovacio I Recerca Industrial I Sostenible). IRIS is coordinated by Dr. Edurne Gaston. Alongside IRIS, the partnership in the Safe-bag project was accepted by 4 MSP associations (the FFDI CR, the Food Industry Association of Austria, the Union of Dairy Beef, Food Industrialists, and Producers of Turkey, and the Chamber of Commerce and Industry of Slovenia – Chamber of Agricultural and Food Enterprises), 2 RTD (Irish Dublin Institute of Technology and Dublin City University), and 4 other institutions (from VB FM/FM Foods Ltd., Irish Nature/Nature's Best, Spanish Verdi/Verdifresh, and Italian OSV/OSV Srl.).

The goal of the project is to develop an innovative packing system with the decontamination ability for the Czech production based on the existing research results achieved by the Dublin Institute of Technology, while the technology with plasma was effectively utilized in the packing process with respect to the decontamination of products on the laboratory level only. Plasma (energetically ionized plan) is widely used in the processing of industrial materials and has lately proven to be successful as the tool for a promising decontamination and exhibited the ability to liquidate pathogenic bacteria on the surface of several types of food and beverages.

A prototype of the packing system with the decontamination ability will be designed and created during the whole project and its efficiency for the benefit of freshly packed salad, fruit, or vegetable will be regularly evaluated by the industry even on completion of the project. The system enables the singlet oxygen a new creation within closed packaging leading to the extermination of micro organisms, upon which the gas helps the restoration of the original form and composition.

The effect of this Safe-bag system of the project will mean (at the moment of contact with the market) significant benefits for safe and self-confident choice of food by consumers, an extended storage period of food, and increased requirements for a fresh product, which will have a positive impact on the competitiveness of producers producing the kind of fresh food stated above.

The FFDI CR will be responsible, under the position of its leadership, for creating an official website and issuing leaflets and posters for the project, training materials, and an online training tool for the entrepreneurial public.

No. 289327

Proposal for a concept of a food research infrastructure to accelerate the innovation in the food industry (FOODMANUFUTURE)

The two years' project 7.R.P. of the EU from the category Coordination and Support Action is designed for the preparation of a proposal for a concept study intended for the basic decision-making on the research infrastructure of the European food research. The research infrastructure will be directed at accelerating the innovation of the food sector through excellent research including a transfer of knowledge and motivating to educate. The project includes parties from the industry, the academic sector, public and private entities from the food sector, and the production of technologies with the aim of fulfilling needs of small, medium, and big enterprises through a multidisciplinary approach on the European scale. The output will be a proposal for a concept study. The consortium is based on a wide network of public and private entities active in ETP FOOD FOR LIFE. The coordinator is the Aalborg University from Denmark. The FFDI CR is involved through the consortium SPES GEIE.

No. 315313

Development of durable paper and paperboard surface systems on the basis of proteins with the aim of increasing the recycling of the food and drink packaging (BIOBOARD)

It is a three years' project from the category Research for the Benefit of SME's. In the 14 members' consortium, the FFDI CR is a direct partner and the coordinator is IRIS – Barcelona, Spain. The goal is to develop a series of bio-coating and composites along with the methods of their production for the application on paper, paperboard, and cardboard with the aim of replacing conventional plastics based on fossil fuels (polyethylene) in laminated packaging. The project comes from the previous research that coatings based on animal proteins, such as coatings on the basis of whey proteins or vegetable proteins, the wheat gluten, soya protein, or rye zein, can make up biodegradable plastic layers which can replace the existing plastic layers in multiple-layer packaging and increase their recyclability.



PROJECTS CO-FUNDED BY EU (75 % OF THE PUBLIC RESOURCES) AND CZECH REPUBLIC (25 % OF THE PUBLIC RESOURCES)



PROGRAM ROZVOJE VENKOVA

Ministry of Agriculture: EAFRD/PRV CR 2007-2013

Within axes I and II of the EAFRD/Rural Development Program of the Czech Republic for 2007-2013, the FFDI CR continued its work of 2008 to 2010 within which it implemented five nation-wide cycles of 10 seminars with the following topics: Cycle I: Strengthening of Consumer's Trust and Food Producer's Task within the Food Chain; Cycle II: Requirements for the Protection of the Environment and their Impacts on the Competitiveness of Processing Enterprises; Cycle III: Quality of Food as the Tool Affecting Consumer's Decision-making; Cycle IV: Certification of Quality and Safety Systems in the Production of Food.

The successful evaluation of applications filed with the FFDI CR in 2010 constituted, in the practice in 2011, the training of more than 400 representatives of the processing industry through two other nation-wide cycles of 9 seminars. The first cycle of the training, which took place in February and March 2011, introduced responsible workers from the food industry the currently offered opportunities to fund entrepreneurial intentions from the Rural Development Program and the EU and provided participants in the seminar with the most important facts to achieve a positive evaluation of individual operational programs by selection commissions, projects of the 7th and 8th Framework Programs of the EU. In the Czech Republic, the issue of strengthening the competitiveness of enterprises active in the area of processing agricultural production belongs among one of the main priorities of the governmental policy, but in the practice, a high level of the absence of knowledge and current awareness of the financial opportunities offered prevails in the industrial sphere.

In May and June 2011, the second cycle accompanied by lecturers, being the highest representatives of the state administration (Ministry of Agriculture, SAFI, SVA CR), and by the Institute of Chemical Technology Prague and the FFDI CR focused on the issue of the system of surveillance of the food market in the Czech Republic. In connection with the implementation of regulations on the system of checks of food enterprises by surveillance bodies, the situation when food enterprise operators do not understand clearly the surveillance bodies' approaches and requirements with regard to some aspects of this system can occur. The goal of the project is to focus on the strengthening of communication and explain the approach to checks between surveillance bodies and food enterprise operators and other groups of interest. Last but not least, the project's goal is to strengthen the safety of food through a common uniform approach of surveillance bodies and operators.

All results from the events stated above (presentation of lecturers, the collection, CD-ROM) can be found on the official webpage of the FFDI CR www.foodnet.cz (EU/CZ projects, EAFRD/RDP CR 2007-2013).

In 2012, the secretariat of the FFDI CR will prepare another series of nation-wide regional seminars the practical intentions of which can be found on the webpage of the FFDI CR (www.foodnet.cz) and on the webpage of the Czech Technology Food Platform (www.ctpp.cz).

CZECH TECHNOLOGY FOOD PLATFORM



“ The Czech Technology Food Platform (CTFP) established in 2006 associates industrial enterprises, sector organizations, primary producers, research institutions, consumer organizations, and public administration bodies for the purpose of creating common visions, in particular, for the research in the food industry.”

Miroslav Koberna, Deputy Chairman of the Management Board

Česká technologická platforma
pro potraviny

The Czech Technology Food Platform (CTFP) established in 2006 associates industrial enterprises, sector organizations, primary producers, research institutions, consumer organizations, and public administration bodies for the purpose of creating common visions, in particular, for the research in the food industry.

Since its beginning, the CTFP has been originating from the activities and goals of the European Technology Platform FOOD FOR LIFE the FFDI CR is the founder of and which includes the support of a sustainable, successful, and competitive Czech agricultural food industry, the ensuring of wide employment and business opportunities for the Czech Republic and the whole of Europe, the ensuring that a healthy choice is an easy choice, the support of the regulation and the creation of a policy on the national and regional levels, the contribution to a sustainable development both at home and in Europe, the extending of the ability of the Czech and European agricultural food industry, and the creation and utilization of the market segments which are less sensitive to the price competition, or the support of the approach “From a farm to a fork” adding a value along the food chain. Besides this, the goal is to ensure an effective and sustainable interaction among all the parties involved, present a well-defined Strategic Research Plan (SRP) for an innovative food production, offer an implementation plan which will include the mobilization of sources to support Europe-wide research, the training, education, and distribution of knowledge on the basis of cooperation, create consumer’s trust in food and food products, considerably reduce the cost of food contributing to better health in the population, and extend long-term job opportunities within the Czech and European food industries.

To achieve the goals stated, the CTFP adopts an annual work plan the content of which is the preparation of a common vision of the Czech Technology Food Platform together with other involved parties from the agricultural food industry and related sectors, including retail, research institutions, regulatory bodies, and consumer organizations. The long-term action plan coming from this vision includes public and private activities in the area of research and

development, training, education, building capacities, managing innovations, and required equipment. The CTFP works with extensive communication activities with all members and non-members of the platforms involved (institutions, companies, etc.) and with consumers with the aim of uniting information and recommendations for consumers. The CTFP supports research which increases consumer’s trust in food and decreases national and regional expenses for healthcare and contributes to the production of food which is economically, environmentally, and socially sustainable. In this respect, the CTFP relies on communication tools, being its webpage, the magazine Svět potravin, the Project Consulting Center, and the Group for Efficient Communication. It is also active in the area of participation in approval, administrative, and decision-making processes associated with the support of business and research provided by state and other institutions.

Current Status

In the area of research, the CTFP follows the priorities established by the European Technology Platform (ETP) “FOOD FOR LIFE” which set a general framework for food research up to 2020. Last year, CTFP’s individual documents were completed in a way that they could follow the other documents corresponding to the ETP’s agenda.

Thanks to the national support the CTFP has been provided with by the Ministry of Agriculture since 2008, publication and communication results are successfully implemented. Alongside many ETP and CTFP materials, many materials of the working groups were published and the CTFP promoted itself in the magazine Svět potravin where there is space for informing the wider public about its activity. The participation in seminars and conferences during the year, which permanently increases the awareness of the CTFP with relevant persons, as well as the information searched on the CTFP’s webpage on www.ctpp.cz, was significant.

The CTFP actively cooperates with the division for science and research of the Ministry of Agriculture within the Agricultural Research Concept and with the Academy of

Agricultural Science and participates in formulating priorities and goals of the food research approved by the Ministry and the Government Council. These priorities are forwarded through meetings of the Advisory Group of the CTFP headed by the Minister of Agriculture and to other sector ministries responsible for the area of the food production and consumption. The CTFP also has its representatives in advisory and steering commissions of the Ministry active in the area of science and research.

In 2008, the CTFP’s scientific committee corresponding to the Federation’s committee for science and research was established. Its activity is pursued by leading food experts from research institutes and universities and it intensively works on a wider involvement of the CTFP and its experts in European structures whether in the ETP or the 7th FP and the newly prepared 8th FP.



CZECH TECHNOLOGY FOOD PLATFORM



Priorities of CTP's Research:

Topics for the Food and Health Priority

- Study of metabolic functions and the effect of individual components of food on human health.
- Study of parameters of the composition and microbial parameters of food material, in particular, of bioactive substances, probiotics, and prebiotics for the utilization in food and functional food and the evaluation of the nutrition quality of food.
- Outlining of the composition of functional food and health-beneficial food, including the bases for nutrition and health claims.
- Effect of the technological processing on the nutrition properties of food.

Topics for the Food Quality Priority

- Development of methods of evaluating raw material and finished products.
- Development of methods of detecting faked food.
- Support of the improvement in the safety and nutrition value of traditional food.

Topics for the Food and Consumer Priority:

- Support of the improvement of communication (in particular, crisis communication).
- Study of the process of consumer's decision-making in relation to food.
- Consumers' expectations in relation to the quality, nutrition properties, and safety of food.

Topics for the Food Safety Priority:

- Development of simple detection and control methods for industrial utilization.
- Development of procedures for minimizing the content of toxic substances in food (incl. natural toxins).
- Procedures for minimizing the microbial contamination of food.
- Modeling and predicting of the dynamics of the conduct of food and microorganisms, or other simple tools to assess risks.
- Improvement of monitoring and traceability procedures in the food chain.
- Development of active and intelligent elements to strengthen the quality and safety of food and consumer's awareness.

Organizational Structure



Summary Report of FOODSERVIS for 2011

FOODSERVIS



“ Professional assistance and consultancy services in the preparation, administration, implementation, check, and sustainability of projects, in particular, within national subsidies, structural funds, and the Rural Development Program.”

Václav Suchan, Director of FOODSERVIS s.r.o.

Professional assistance and consultancy services in the preparation, administration, implementation, check, and sustainability of projects, in particular, within national subsidies, structural funds, and the Rural Development Program

In 2010, the prevailing activity of FOODSERVIS s.r.o. was the provision of consultancy in the area of project and subsidy management. The priority of the investment projects implemented for company's clients is to strengthen the competitiveness in domestic and foreign markets, in particular, by introducing innovations in the agricultural and food productions, increasing the efficiency of the production, and saving energies with a simultaneous increase in the quality and safety of products. More and more projects are implemented according to the current trends with emphasis on the protection of the environment, the support of equal opportunities, and the increasing of its employees' qualifications.

Services in the area of business, financial, organizational, and economic consultancy are provided, in particular, to companies in the food industry, agricultural production processors, producers of food, beverages, and forages, primary producers, and research and development institutions.

In 2011, FOODSERVIS s.r.o. pursued, from the technical and professional perspectives, the activity of the Project Consulting Center attached to the Czech Technology Food Platform, the main workload of which is the methodological and organizational support for entrepreneurs in the area of the production of food and forages, primary producers, and entities in the scientific research sector in the area of obtaining subsidies from European and national funds and institutions. The priority of the Project Consulting Center is to improve the awareness and approach of all participating entities to national and EU subsidies.

The successful fulfillment of strategic goals of FOODSERVIS s.r.o. based on a balanced and sustainable development on the basis of partnership and communication enables the development of its activities in compliance with the enterprises' current planning and management tendencies.



FFDI Bodies

Board of Directors (as of 30 April 2012)

COUFAL Stanislav	Moravia Lacto a.s.
FALTÝNEK Jaroslav	AGROFERT HOLDING, a.s.
GOJIŠ Oldřich	INTERLACTO, spol. s.r.o.
HRABCOVÁ Magdalena	Mars Czech s.r.o.
JEŽKOVÁ Jana	Karlovarské minerální vody, a.s.
KUBISKA Zdeněk	Czech-Moravian Confederation of Organisations of Agricultural Supply and Purchase
KURČÍK Jaroslav	PENAM, a.s.
MATES František	Association of Poultry-Producing Enterprises
MOTEJZÍK Čestmír	ZŘUD–MASOKOMBINÁT PÍSEK CZ, a.s.
MRÁZEK Michal	VITANA a.s.
MUSIL Stanislav	Association of Bakers and Confectioners of the Czech Republic
NASLER Antonín	STOCK Plzeň–Božkov s.r.o.
NĚMEC Michal	Czech-Moravian Dairy Association
PILČÍK Karel	Czech Meat Processors Association
POJER Josef	Bohemian-Moravian Sugar Association
PRAŽAN Jiří	Non-alcoholic Drink Producers Union
REINBERG Oldřich	Tereos TTD, a.s.
STRNAD Hynek	Association of Legal Entities of Canning Industry and Distilling Industry
ŠTĚPÁNEK Zdeněk	BONECO a.s.
TEPLÝ Milan	MADETA a.s.
TOMAN Miroslav	Federation of the Food and Drink Industries of the Czech Republic
TOMÁŠ Pavel	PT servis konzervárna spol. s.r.o.
TOMÁŠEK Jiří	Association of Delicatessen Producers
VÁVROVÁ Marie	Czech Starch Association
VESELÝ Jan	Czech Beer and Malt Association
VOZDECKÝ Josef	BOHEMIA SEKT, s.r.o.
WALTER Martin	Nestlé Česko s.r.o.

FFDI Bodies

Executive Board (as of 30 April 2012)

TOMAN Miroslav	President
KUBISKA Zdeněk	Vice-President
KURČÍK Jaroslav	Vice-President
MUSIL Stanislav	Vice-President
Nasler Antonín	Vice-President
STRNAD Hynek	Vice-President
TEPLÝ Milan	Vice-President

Supervisory Board (as of 30 April 2012)

HUML Zdeněk	Non-alcoholic Drink Producers Union
KLOUD Jaromír	Czech Meat Processors Association
KOZEL Pavel	MADETA, a.s.

Committees (as of 30 April 2012)

Legislation Committee	WALTER Martin	Chairman of the committee
Environmental Affairs Committee	JEŽKOVÁ Jana	Chairman of the committee

Sections (as of 30 April 2012)

Section for Milk	NĚMEC Michal	Chairman of the section
Section for Organic Food	n/a	
Sections of Ingredients and Preparations for Bakery and Confectionery Production	LIPAŤSKÝ Miroslav	Chairman of the section
Sections of Frozen Food Products and Ice-cream	RUBÁŠ Antonín	Chairman of the section
Section of Technology Suppliers	JEDLIČKA Jan, Bc.	Chairman of the section

Working Groups (as of 30 April 2012)

Working Group for Healthy Lifestyle	KLOFANDA Martin	Chairman of the working group
Working Group on Trade Policy and Marketing	n/a	

Secretariat

Federation of the Food and Drink Industries of the Czech Republic

Miroslav Toman
President

Miroslav Koberna.
Director for Programming and Strategy

Tomáš Kreutzer
Head of Office

Dana Večeřová
PR Officer, Head of Communication and External relations Department

Zdenka Ehlová
Manager

Alexandra Adámková
Communication and External Relations Department

Markéta Chýlková
Head of Legislative Department

Šárka Štejnarová
Head of Office and Economic Department

Lenka Vondrušková
President's Assistant/Secretary

Iva Caklová
Manager

Alexandra Košťálová
Manager

Tomáš Vacek
Manager

Members

Companies (as of 30 April 2012)

AG FOODS Group a.s.	FRUTA Podivín, a.s.	Plzeňský Prazdroj, a.s.
AGROFERT HOLDING, a.s.	FUNGHI CZ, a.s.	POEX Velké Meziříčí, a.s.
ALIKA a.s.	GOLDIM spol. s r. o.	POLABSKÉ MLÉKÁRNY a.s.
ALIMPEK spol. s r. o.	H.J.Heinz CR/SR a.s.	PRO-BIO, obchodní společnost s r. o.
ALIMPEX - Louny spol. s r. o.	Hamé s.r.o.	PROFROST a.s.
ARTIFEX INSTANT, s.r.o	Heineken Česká republika, a.s.	PROQIN s.r.o.
backaldrin s.r.o.	Hügli Food s.r.o.	PT servis konzervárna spol. s r. o.
BEAS, a.s.	INTERLACTO, spol. s r. o.	RUDOLF JELÍNEK a.s.
BIOFERM - lihovar Kolín, a.s.	Jan Becher - Karlovarská Becherovka, a.s.	Slovácká Fruta, a.s.
Blatenská ryba, spol. s r. o.	JH GROUP, spol. s r. o.	SLOVLIKER ČR, s.r.o.
BOHEMIA SEKT, s.r.o.	Karlovarské minerální vody, a.s.	STOCK Plzeň-Božkov s.r.o.
Bohemia Venture, a.s.	Kofola a.s.	Školní rybářství, Protivín
Bohušovická mlékárna, a.s.	Kostecké uzeniny a.s.	Tereos TTD, a.s.
BONECO a.s.	Kraf Foods CR s.r.o.	TPK, spol. s r. o.
Budějovický Budvar, národní podnik	LYCKEBY CULINAR a.s.	UNILEVER ČR, spol. s r. o.
BUDĚJOVICKÝ MĚŠŤANSKÝ PIVOVAR a.s.	MADETA a.s.	UNITED BAKERIES a.s.
CARLA spol. s r. o.	Mars Czech s.r.o.	VALDEMAR GREŠÍK - NATURA s.r.o.
CATUS spol. s r. o.	MD logistika, a.s.	VITANA, a.s.
Coca-Cola Česká Republika s.r.o.	MILCOM a.s.	VÍNO BLATEL, a.s.
Crocodille ČR, spol. s r. o.	Mlékárna Hlinsko, s.r.o.	Vodňanská drůbež, a.s.
ČESKÉ HOUBY a.s.	Mlékárna Olešnice, RMD	XAVEROV, a.s.
Danone a.s.	MOCCA, spol. s r. o.	ZNOVÍN ZNOJMO, a.s.
DELIMAX, a.s.	Moravia Lacto a.s.	ZŘUD-MASOKOMBINÁT PÍSEK CZ, a.s.
Devro s.r.o.	MRAZÍRNY PLZEŇ - DÝŠINA a.s.	ZŘUD - Masokombinát Polička, a.s.
Drůbežářský závod Klatovy a.s.	Nestlé Česko s.r.o.	
Drůbež-Vysočina spol. s r. o.	NOWACO Czech Republic s.r.o.	
EURO FRIGO Praha, spol. s r. o.	OLMA, a.s.	
EUROICE s.r.o.	OTMA - Sloko, s.r.o.	
EUROSERUM s.r.o.	PENAM, a.s.	
EXTRUDO Bečice s.r.o.	PIKA, a.s.	
FISH MARKET a.s.	Pivovar Protivín, a.s.	

Members

Branch Associations (as of 30 April 2012)

Association of Bakers and Confectioners of the Czech Republic	Czech-Moravian Poultry Union
Association of Delicatessen Producers	Czech Starch Association
Association of Legal Entities of Canning Industry and Distilling Industry	Czech Union of Spirits Producers
Association of Poultry-Producing Enterprises	Distilleries Union of the Czech republic
Bohemian-Moravian Sugar Association	Mineral Water Association
Czech Beer and Malt Association	Non-alcoholic Drink Producers Union
Czech Bottled Watercooler Association	Union of Confectioners of the Czech Republic
Czech Fish Farmers Association	Union of Distilleries of the Czech Republic
Czech Meat Processors Association	Union of Industrial Mills of the Czech Republic
Czech-Moravian Confederation of Organisations of Agricultural Supply and Purchase	Union of Millers and Bakers of the Czech Republic
Czech-Moravian Dairy Association	Union of wine of the Czech Republic

Associated Members (as of 30 April 2012)

ABB s.r.o.	EUROPROJECT SERVICE a.s.	MVDr. Pavel Mikuláš - Laboratoř pro vyšetřování potravin
AGRAL s.r.o.	Ferrero Česká s.r.o.	MVDr. Šotola s.r.o.
AGROTRADE, a.s.	Food Research Institute Prague	NutriAcademy, s.r.o.
ALS Czech Republic, s.r.o.	FOODSERVIS s.r.o.	Philip Morris ČR a.s.
Analytické laboratoře Plzeň, a.s.	HÁJEK ZRZAVECKÝ advokátní kancelář, s.r.o.	Research Institute of Brewing and Malting, PLC
ARGO BOHEMIA, s.r.o.	INCHEBA PRAHA spol. s.r.o.	Secondary School of Foodstuff Technology, Pardubice
BARENTZ spol. s.r.o.	Ing. Jaroslav Camplík	Secondary School of Agriculture and Food Industry, Klatovy
Bohemia Certification s.r.o.	Institute of Chemical Technology Prague – – Faculty of Food and Biochemical technology	TENEZ a.s.
BOHEMIACHLAD spol. s.r.o.	Karel Novosad	TPA Horwath Corporate Finance s.r.o.
CERT-ACO, s.r.o.	KEZ o.p.s.	TÜV SÜD Czech s.r.o.
COINTRA s.r.o.	KPMG Česká republika Audit, s.r.o.	UNITED BUSINESS a.s.
Czech Association of Special Foods	LAKTEA, o.p.s.	Veletřhy Brno, a.s.
EKO-KOM, a.s.	Leona Petrová	VESTA AUTO s.r.o.
EKO-LAB Žamberk, spol. s.r.o.	Mendel University in Brno	
EKOCENTRUM OVALAB, s.r.o.	METAROM, a.s.	
EUROFINS CZ, s.r.o.		

Adresa

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Annual Report 2011

THE FEDERATION OF THE FOOD AND DRINK INDUSTRIES OF THE CZECH REPUBLIC



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