

2014

Annual Report

Federation of the Food
and Drink Industries of the Czech Republic



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and Drink Industries of the Czech Republic

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Miroslav Toman, President of FFDI

„For the food industry, 2014 was in particular a year of change, but also one of unexpected twists and challenges.“

Foreword

During the year, the Food Act was approved, which in its original version was supposed to give producers and consumers more information about the composition of the product, especially for non-prepacked food, as well as information about the percentage of Czech food sold in retail chains. This is fully consistent with my belief that the consumer has the right to know what the product is and who produced it and in what country.

During the legislative process, however, the obligation to indicate the country of origin disappeared from the law, and instead the Food Act only stipulates that the producer be indicated for the products, which is not quite ideal. Likewise, when it comes to indicating the five countries with the greatest percentage of the sales of the retail chain, the method of identifying these countries was not adequately specified. Since there will be an amendment to the Food Act during the course of 2015 for reasons of implementing the Tobacco Directive, FFDI is convinced that the specification for indicating the five countries with the greatest share of the food products supplied should be changed precisely in the sense of indicating the country of origin of the food, and not the headquarters of the distribution centre.

A major impact on the Czech food industry was the announcement of Russian sanctions. When they were announced, FFDI CR indicated that these sanctions will have a clear negative effect on the Czech agricultural and food industry. Directly by the disruption and loss of business relationships built up over the years with substantial financial and personnel costs with, paradoxically, the support of the country and the European Commission, which had begun to bring about results lately. This gave trade with Russia a steadily rising trend, and most importantly, for our highly positive trade balance. But also indirectly, by disrupting trade with countries for which the Russian market is a priority market in the agrarian sector – Germany, the Netherlands, Denmark, France and Poland, where the sanctions are exerting considerable pressure on agricultural and food production, which will have to be placed on other markets. We pointed out that there was a real danger that the destinations where this surplus production should go with state support, whether open or hidden, will be new member countries. This, unfortunately, was confirmed at the end of the year, because for many products, like fruits and vegetables or dairy products, there is pressure to lower the price more and more.

An amendment to the act on significant market power continued in 2014. The amendment was supposed to eliminate interpretative difficulties associated with the basic concept of significant market power and should ensure a more effective, easier-to-apply law and thereby contribute to an improvement in the business environment in the Czech Republic. Despite all these positive changes in the proposed law, however, FFDI strongly disagrees with expanding the scope of the law to include suppliers, because there is no demonstrable reason for expanding the scope of the law to include suppliers.

In 2014, we, as the Federation of Food and Drink Industries of the Czech Republic, were heavily involved in supporting and promoting Czech food, whether it concerned the labels KLASA, Regional Food or Czech product – guaranteed by FFDI CR, which are labels that will undoubtedly help the consumer choose high-quality Czech food. I am convinced that these labels guaranteed by the state or professional federation are and will be consumer guides for selecting high-quality foods with guaranteed origin.

FFDI IN 2014

„As with the previous year, 2014 marked a period full of dramatic events and series of major changes in the organization and activities of the Federation“

Miroslav Koberna, Director of Programming and Strategy

After the early October elections to the Chamber of Deputies, President Zeman named a “political” government in January 2014 headed by Prime Minister Sobotka, which was the result of a coalition agreement between the Social Democrats, YES, and Christian Democrats. For the Federation, this meant an end to Minister Toman’s tenure at the Ministry of Agriculture and his return as president Toman of the Federation. Returning with him were the other employees placed on temporary leave. This moment, however, was in fact the beginning of other changes and processes, because in March the XXII Assembly of the Agrarian Chamber of the Czech Republic was held and president Toman was nominated for president of the Agrarian Chamber. He was elected by a vast majority of the votes cast by the delegates present. The result means much closer cooperation between the Federation and Chamber, with positive impacts on the efficiency of joint lobbying and eliminating most of the friction of the past, which will fully offset the need for an increased workload on the staff of both secretariats and elected bodies. It will be able to show how the much touted cooperation along the food chain can look in practice.

The general meeting of FFDI at the beginning of June confirmed this situation and adopted a set of priorities for 2014. It furthermore evaluated the implementation of the priorities adopted and put into practice in previous years, which were included in the report of the

Board. With regard to the focus of FFDI activities during the reporting period, its priorities were similar as in previous years:

- Quality and consumption of Czech food;
- Competition and competitiveness;
- Science and research (CTPF);
- Promotion and communication field;
- Legislation and
- Support for the feed industry.

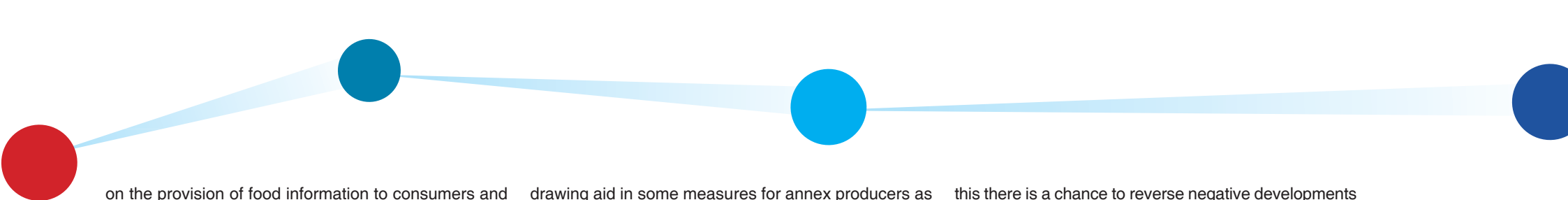
The fact that the Federation maintained a balanced budget and even recorded a mild surplus despite the national economy growing very slowly in 2014 and particularly new problems communicating with the Ministry of Agriculture, as will be discussed below, is an indication of the solid personnel and organizational work of the Secretariat and the support of the elected bodies.

The implementation of the proposed priorities this year included the involvement of the Federation in activities aimed at developing a positive business environment, improving the workings of the market, the simplification of legislation, promoting exports and domestic consumption, including adequate protection of the domestic market, particularly with regard to continuing problems with Polish imports of cheap and poor quality production, meant mainly for discount chains. The Federation made use of all opportunities, such as

Business Council meetings and roundtables of the Minister of Industry, roundtables of the Minister of Agriculture, and meetings of working groups, to air the views, wishes and problems of the sector.

The Ministry of Agriculture was our main partner in 2014, even though the situation had changed dramatically in comparison with the previous period, because after a long fifteen years Minister Jurečka became head of the department for KDU-ČSL. A drastic change in the management of the department followed, which had a negative impact on the ability of the authorities to communicate and solve problems. The result was not only complicated solutions to the everyday agenda, but also a disruption in key chapters for food producers, such as support of the KLASA label or the concept of agriculture and food. Some subsequently unrealized but already approved projects resulted in a worsening of the Federation’s economic situation and a number of these issues have continued into the following year, e.g. in the form of limiting cooperation in solving functional tasks or reducing support for the technological platform.

Like many times in the past, FFDI played an important role this year in clarifying the rules for labelling, both in relation to the supervisory authorities and in relation to the Ministry of Agriculture. These concern two key provisions – Regulation (EU) no. 1169/2011



on the provision of food information to consumers and an amendment to the Food Act. The situation in the legal environment, which is concerned with labelling and food production, remains complicated by the fact that no document was issued on either the European or national level that would facilitate guidance in the new rules, which offer regulation on the provision of food information to consumers.

One of the basic priorities of the federation in 2014 was support for the food industry. The success of the Federation can be put down to using the rest of our funds to support innovative projects in the reserves of the 18th round and in modernization of the 19th round in 2014 and furthermore to the involvement of food producers in the 22nd round in measures I.1.3.1 Adding value to agricultural and food products, where 200 million CZK was allocated, and this round will be announced in January 2015.

As at the end of 2014, 985 projects were approved worth 3,782,198,843 CZK, of which 770 projects in the amount of 2,881,650,481 CZK were paid up. Of these, 57 projects were approved for 1,012,159,273 CZK as part of an innovative sub-provision. In the case of the Ministry of Industry and the Operational Program Enterprise and Innovation, good cooperation continued in the past year and the aid outputs have significantly improved for food producers, even though the shortage of applicants for projects persisted. The Federation initiated negotiations and better coordination of support between the two departments and in particular of maintaining support for non-annex producers within the new operational program of MIT, with the possibility of

drawing aid in some measures for annex producers as well. By the end of 2014, food producers had submitted projects worth 1,676,992,000 CZK and had drawn 1,072,416,127 CZK for NACE 10 and 991,000,220 CZK for NACE 11, where 613,034,482 CZK was drawn. Thus, the total projects submitted in OPEI were worth 2,667,992,220 CZK, of which 1,685,450,609 CZK of the projects was paid.

For food producers 13, 140 million CZK was proposed for the 2014 budget. Projects worth a total of 600,319,660 crowns were submitted and 140,432,778 crowns were paid, representing transactions of 23.3939 % of a possible 25 %, which is optimal considering the radius of acceptable applicants and one which we hope will be maintained in 2015.

Regarding the Czech retail market, it recorded a slight recovery with the continuing concentration of retail chains, maintaining their sales and profit margins at the expense of supplier margins. A striking example is the departure of INTERSPAR, which was among the “decent” ones. It was taken over by the network chain Ahold (Albert), one of other negative impacts on Czech suppliers. The increase in the proportion of foreign products and private brands in the market has continued, even though it seems that announced consumer interest in shopping in independent and specialized stores continues, and it seems that, despite the price wars of retailers and the increasing share of purchasing food at discounts, there is continued interest in quality Czech food bearing the logo KLASA and in regional products grouped under the logo Regional Food, and because of

this there is a chance to reverse negative developments in the future.

In the area of supplier-customer relations, it can be said that, despite all the catastrophic visions repeatedly formulated by the state-managed CTA, the Act on Significant Market Power lives on and is positively reflected in them. The amendment to the law drafted jointly by OPC, MIT, MA and MF and supported by the Business Council was an opportunity to simplify the interpretation of the law and remove its imperfections, but it was bogged down in the Government Legislative Council as early as 2013 and despite all the promises of the government coalition, it was still stuck there in 2014. On the contrary, it seems that the government has successfully put the brakes on this amendment. As we have stated in the past, the perception of retail chains has changed even within the EU, where an analysis prepared by the European Commission has shown that the common market and in particular suppliers from small and medium-sized enterprises have been hurt by the practices of retail chains. At present, the EC declares that it is interested in adopting ethical codes developed by the SCI common platform at the European level and in monitoring and having them enforced by the national authorities (OPC), which is acceptable for us. So far, however, the idea of adopting a common code at the Czech level is unacceptable for producers, because it will be exploited by CTA and not used to improve the situation on the market, just an attempt to repeal the law.

Also in the previous period was amongst the main priorities of the federation the consumer, who decides for

himself whether to buy cheap, poor quality goods of a Polish, German or unknown origin or quality products from a traditional Czech producer. Consumers still lack enough objective information for decision-making and that is why the decision of the ministry to continue supporting the KLASA label and regional foods is important. Although the Federation has criticized actions such as “Czech Christmas” as conceived by the ministry, it is true that any support or promotion of Czech products is desirable. Since 2011, the Federation has had the registered label “Czech product – guaranteed by the Federation of Food and Drink Industries of the Czech Republic”, which by the end of 2014 was held by a total of 59 companies with more than 1,200 products. The label is being presented in both printed and electronic media and on the occasion of seminars and events organized by the Food and Drink Industries of the Czech Republic. A catalogue of holders of this label was also published in the middle of the year, as well as a desk calendar by the close of the year. This activity has received positive feedback from the media and businesses and research conducted by the agency STEMMARK puts the familiarity of consumers with it in second place behind the KLASA label. Important here for consumer information was the approval of an amendment to the Food Act and establishing the obligation for retailers to state the share of imported foods on sale or to indicate the composition and producer of bulk products.

As part of the measures to promote a healthy lifestyle and balanced diet, especially among children, the federation and the Czech Technology Platform for Foodstuffs support projects aimed at building the right habits.

The successful project aimed at school children, “Easily Live Healthily” continued, and, in cooperation with Palacky University in Olomouc, the first year of the project called Smart Life, intended for high school students, was successfully completed.


The European food industry and agriculture were hit hard in the middle of the year when President Putin responded to the game of sanctions against Russia by imposing an embargo on the imports of agricultural and food products from the EU and other countries. The Federation was a member of the crisis team created at the beginning by the government and it constantly pointed out the specifics of the Czech market, where the direct impact of export restrictions would be negligible compared to secondary effects and a drop in prices in main export countries like Poland, Germany, Denmark, and the Baltic states. In response, the government adopted a regulation on tightening controls over imports and strengthening export promotion, which is currently underway. It is clear, however, that the problem is gradually deepening and unless both sides lift the sanctions, it will be necessary to support Czech producers in the affected sectors much more effectively.

In view of the above, supporting exports to both the combined European market and to third countries remains, as far as increasing competitiveness goes, the key issue. There was finally a shift in the perception of economic diplomacy at the Ministry of Foreign Affairs and it is strengthening its activities towards Russia, other countries of the former Soviet Union, the Arab countries or towards the USA and China.

The Czech Technology Platform for Foodstuffs (CTPF) continued in 2014 with series of its activities thanks to the continued national support provided to it by the Ministry of Agriculture. Professional, publishing and organizational activities included issuing new trade brochures as the result of the working groups and further professional publications have been supported. The platform supported also some seminars, conferences and round tables and provided comprehensive communication not only between professional partners in the field of science and research and food producers through the Project Advisory Centre, but also with representatives of state institutions and elected bodies within the framework of regular meetings of the Group for Effective Communication.

For Czech food producers, 2014 was another difficult year in a string of many, affected not only by price increases and stagnation in the creation of added value, but also by the continuing trend of cross-border shopping and the overall nervousness of consumers in the political and economic climate of this country. This image of contemporary society is reflected by stagnation in demand and the pressure for discounts off purchases, and any change for better conditions in the context of incipient economic growth has been coming only slowly.

According to EUROSTAT, the Czech food industry was not even among those that grew in 2014; on the contrary it showed a decrease of 1.4 % compared to the previous year. Needless to say, the results were no better throughout the EU, which in the comparable period declined by 1.8 %. And because EUROSTAT's data



corresponds to the data and forecasts of CSO in terms of a drop in the price of food and beverages, more of the same can likely be expected for the next period.

Even the trend of commodity price fluctuations failed to improve in 2014, caused by instability in the environment of third countries, by the uncertain whether, and especially by the EU's own policy of continuing to promote the use of agricultural production for non-food use in biofuels, which apparently failed to definitively break the green vision, and the EU, under hard EU green assault, gave in and is continuing on the path of the least competitive economy in the world. In conjunction with the Russian embargo and the negotiation of a free trade agreement with the USA, this can be crucial for further development.

In the area of the market trend, our priorities in communication with the consumer, aimed at promoting quality production, regional brands and local manufacturers, are paying off. In no way is the solution working on the farm or yard sales, farmers' markets or organic food production, which represent and will always represent a mere fraction of the total production. On the contrary, the validity of our efforts for legislatively repairing relations with business, for the transparency of margins and proportion of individual segments of chains in dividing up and strengthening the role of the retailer, as a promoter of local production and not importer of questionable production from around the world. There is an urgent need here for strengthening the role of supervisory authorities and for clear political input regarding what can be expected. Neither the government

nor the government coalition here has come close to fulfilling their commitments in support of Czech agriculture or food producers and in protecting Czech consumers, which they declared was their intention in the coalition agreement and by government proclamation, and in particular they did not show enough courage to stand up in defence of domestic interests, neither before the administration in Brussels nor their own "colleagues" from neighbouring countries.

The last area that needs to be mentioned involves the activities of the Federation in support of the innovation of potential producers, by increasing the share of food research and development in total expenditures on research and development and by equalizing basic and applied research in evaluating the results. The competitiveness of producers in the present and future lies in applied research and putting its results into practice. In this area, the Federation launched a new project last year, the President's Prize for the best innovative food product. The competition involved 17 companies with a total of 37 products, and the best innovative food products for 2014 were Ličenský Zrník Bread (BEAS, a.s. - Lično Bakery), Chmelinky (CARLA spol. s.r.o.), UGO Carrot, Apple; UGO Orange and UGO Beetroot, Apple (Kofola a.s.), Cloister cheese and South Bohemian round cheese (MADETA a.s.) and Matylda z hor, cheese sticks (POLABSKÉ MLÉKÁRNÝ a.s.). A special prize in the category "Food good for people intolerant to gluten" was awarded to the Gluten-free bread and Gluten-free chocolate cake from SEMIX PLUSO, spol. s.r.o., and the second special prize, in the category "Food for Special Medical Purposes", was awarded to

the product Nutrisen from Bohušovická mlékárna, a.s. The awards ceremony of the competition took place at the exhibition Bread Basket in České Budějovice on 30 August 2014 in front of distinguished guests. The representatives of the winning companies received their certificates from the president of the Federation of Food and Drink Industries of the Czech Republic, Miroslav Toman. Each company, moreover, received a voucher to attend the international innovation trade fair SIAL PARIS 2014, as well as advertising space in the media for product promotion. All the products registered in the competition were presented at the exhibition of the Federation of Food and Drink Industries and the Czech Technological Platform for Food.

In conclusion, a single appeal. The Federation of the Food and Drink Industries of the Czech Technology Platform for Food plays an irreplaceable role in fine-tuning and subsequently implementing the new Common Agricultural Policy and in setting the level and structure of aid intended for innovation among food producers in the new programming period. The new structure of the Rural Development Programme offers a significant expansion of the options for cooperation in the development and introduction of new products, and it will be crucial how we use these options. Our main goal for the future is to ensure that the limited resources available in this area are used as effectively as possible, where significant benefits for society in general can be expected in terms of increasing the competitiveness of the food industry by improving the quality, safety and health benefits of products in addition to their obvious export potential.

„The Czech food industry has historically belonged, by its nature, the same as throughout the EU, to the support sectors of the production industry and is a relatively independent part of the food chain. Its importance is primarily due to the fact that it provides the nutritional needs of the population by processing for the most part domestic agricultural production and by producing healthy, high-quality and widely available food. A prerequisite for achieving this goal is to ensure that the industry’s competitiveness continues to grow.“

Hynek Strnad, 1st Vice-President



THE DEVELOPMENT OF THE CZECH FOOD INDUSTRY

THE DEVELOPMENT OF THE CZECH FOOD INDUSTRY

First, it should be noted that for reasons of statistical data processing, not the date of this annual report available data in the assessment of the economy for the year 2014, and therefore we are working with the data for the year 2013.

In terms of its position in the Czech manufacturing industry, the food industry retained its position as a key sector in 2013. The Czech economy saw GVA of 2.44 % for current prices in the production of food, beverages and tobacco products in 2013, which is the same as in 2012. This sector accounted for a total of 2.73 % of employment in the Czech Republic, which is less year on year (this share was 2.75 % in 2012), but even so, it was still one of the major employers, as in the whole EU.

As for a summary assessment of the economy of the food industry, meaning the production of food in the context of the rising prices of food products and an expansion of the business base in 2013, the volume of sales of own products and services at current prices increased year on year. A less favourable development in the food industry occurred in the value added indicator and the productivity of labour calculated from it. Another indicator, gross operating surplus, did not change much year on year in 2013. But there was a decrease in the number of employees, which in 2013 was roughly 2,237 people. In the beverage industry, where prices have essentially stagnated and the number of enterprises decreased year on year in 2013, there was a drop in output as measured by the sales of own products and services at current prices. The volume decreased at the same time for the value ad-

ded indicator and this also applies to employment. The decline in employment, however, positively influenced the growth of labour productivity, which is favourable in terms of competitiveness.

At present, the Czech food industry is more and more influenced by external factors, due to ever increasing globalization. The high number of chains in the Czech Republic has put the food industry not only under competitive pressure from foreign producers, but the continuing downward pressure on prices is creating biased competition, often at the expense of the quality of products. A saturated sales network in the Czech Republic distorts the natural competitive environment and forces food companies to reduce production costs at the cost of limiting product innovation. This situation is completely at odds with current trends in lifestyle and inhibits engagement in European competition. This situation persisted in 2013, which led to a failure to achieve the desired stability and to stop the decline in the dynamics of development in the food industry, and the performance parameters required in a competitive environment were not created as a result. In addition, the trend of restrictions on investment in production from own resources has continued and costs savings accompanied by cutting workforces also continued. The ongoing preparation of new food legislation was also associated with 2013. The result then was a draft amendment to the Food Act, which aims primarily to protect the health of consumers, to protect them from deception and increase their awareness. Not with new legislation or continuing investment and marketing support did the government help change the above trends and improve the position of food businesses.

This state-level aid included developing the production of food products in beverages:

Direct financial support

The volume of aid granted in 2013, amounting to 836 million CZK, in comparison to the 990 million CZK in 2012 represents a decrease of 154 million CZK. This year on year decrease in support occurred mainly within RDP – Measure 1.1.3 as described below.

Promoting the development of food products and beverages was implemented through programs. The crucial ones included:

- Support under RDP – Provision 1.1.3; the provision for adding value to agricultural and food products. Aid in 2013 reached 434 million CZK, of which the EU contributed 326 million CZK and the Czech Republic 108 million CZK). In 2012, this aid was 588 million CZK, of which the EU contributed 441 million CZK and the Czech Republic 147 million CZK.
- National support under Grant Program 13 – Support for processing agricultural products and increasing the competitiveness of the food industry. The total amount of grants in 2013 was 131 million CZK, 132 million CZK was provided in 2012.
- Programs for small and medium-sized enterprises provided through ČMZRB; this involves support through advantageous price guarantees, soft loans and contributions to the payment of interest on bank loans; aid in 2013 amounted to only 30 million CZK, the same as in 2012.

- SAIF expenditures (Marketing Fund); this involves promoting the KLASA label; aid in 2013 was 200 million CZK, in 2012 it was likewise 200 million CZK.
- National support through contributions to the Wine Fund stood at 41 million CZK in 2013; it was 40 million CZK in 2012. The volume of aid granted in 2013 in the amount of 836 million CZK (preliminary figure) is 154 million CZK lower in comparison with the 990 million CZK in 2012. The year on year decrease in aid occurred mainly within RDP – Measure 1.1.3, as noted above.



KLASA label

As a marketing tool, the KLASA label helps increase the value of popular food products. Its purpose on the one hand is to support the marketing activities of food producers, and on the other to inform consumers. The label guarantees that good and wholesome food is really being offered. It is a process of gaining the trust of consumers and customers, of maintaining this trust, which is a prerequisite for the development of the food industry and for safeguarding competition in the context of markets at home and abroad.

The original goal of the campaign in 2014 was to bring the KLASA label closer to consumers so that they would look for and prefer food products bearing the KLASA label, and in doing so use their purchasing habits to create pressure on sellers so that they offer the widest selection of these products in their stores. Given that 2014 could terminate the tender for the agency providing PR and marketing campaign brand, was implemented in only some of the activities and roadshow in summer 2014, and brand presence at trade fairs and exhibitions.

Based on a survey of consumers (December 2013), the KLASA label is currently the best-known indicator of quality food in the country. This label was spontaneously recognized by 54 % of women and even 60 % of mixed populations, supported by knowledge in both target groups exceeding 80 %. Awareness of the label is relatively stable at this time.

The total KLASA database as of 31 December 2014 was 1,179 products from 227 producers. Up to 304 products were awarded the label in 2014.

In 2014, funding in the amount of 48 697 000 CZK from the state budget was used to promote food with the KLASA label.



Regional food 2014

Since 2010, the Minister of Agriculture has awarded the Regional Food label in 13 regions of the Czech Republic to the highest quality agricultural or food products that won out in regional competitions. The products must be made from local raw materials and have ties to the region – whether using traditional methods of production or authentic regional recipes. The Regional Food label is managed by MA and SAIF has been the administrator since 2012.

The Regional Food label is presented in the form of a nationwide information campaign to raise awareness of the label among consumers, to point out the origin, tradition and quality of the product, and at the same time to create a positive perception of regional products. To motivate consumers into actively looking for the Regional Food label and to know the reason why they should choose it. To promote sales and to inform consumers about where they can buy regional food. To increase the visibility of the label through suitable information and co-

The Central Registry of Projects in the field of science and research, in the sub-sector Food industry, which is part of the Agriculture sector, shows that 3 projects were managed in 2013 with state aid amounting to 6,132,200 CZK. From the agriculture sector, this represents 16.4 % of state aid and just 1.0 % of the total amount for all sectors.

Indirect support programs

The competitiveness of agricultural production in the Czech Republic and in the EU market is also dependent on improving the quality of food products. Educating and convincing consumers on the benefits of quality food, e.g. food with higher nutritional value, produced by methods that are more environmentally and animal friendly, etc., is also necessary. Quality food products are generally certified and labelled on the market so as to make it easier for the public to navigate when making purchases. These include:



communication channels and to help increase public loyalty towards local agriculture and food production.

To promote food with the Regional Food label, 20 664 000 CZK was drawn from the state budget in 2014.

The number of products with the label stood at 475 as of 31 December 2014. In 2014, 106 products received the label.

System of Protected Brands of Agricultural Products and Foodstuffs

Protected brands are functioning as a support and protection of agricultural products and foodstuffs. The system of protected brands was introduced in the EU in 1993 and its purpose is to protect the names of agricultural products and foodstuffs against competition from products that unfairly release these products.

Food and agricultural products can be protected by three legal institutions that provide protection designation in EU Member States. In the case of bilateral agreements, this protection is ensured even in contractual third countries around the world.

The protection is provided through registration with the European Commission. These include:



Protected Designation of Origin (PDO)

Protected designation of origin refers to the name of the region. This involves designating agricultural products and foodstuffs that come from this place. ***The production, preparation and processing of these products must take place only in a particular geographic area. There must be a very close connection between the characteristics of the product and its geographical origin.



Protected Geographical Indication (PGI)

Protected Geographical Indication is meant to indicate the name used for designating agricultural products and foodstuffs originating from this place. Agricultural and food products with this logo have a certain quality, reputation or other characteristics attributable to the geographical origin. Compared to the protected designation of origin, the relationship of the product to the geographical area is looser. It is sufficient if at least one stage of production – processing, preparation or production – takes place in the defined geographical area.



Traditional Specialty Guaranteed (TSG)

This indicates an agricultural product or foodstuff from traditional resources or that it is characterized by traditional composition or means of production or processing. The term “traditional” means the demonstrable use of the name for at least 25 years in the market. This logo can be used to differentiate traditional high-quality products that have no bonds to a geographic area from other products on the market.

Since the end of 2012, a new Regulation of the European Parliament and Council (EU) No. 1151/2012 went into force on 21 November 2012 on quality modes for agricultural products and foodstuffs. It also includes the introduction of optional information about the quality “mountain product”. In the future, the introduction of the term “island farm product” will be considered to protect its specific properties.

At present, the Czech Republic has granted protection to the following agricultural products and foodstuffs:

CHOP – Czech cumin, Chamomilla Bohemica, Vřestarská onions, Saaz hops, Po-
hořelický carp, Nošovické sauerkraut.

PGI – Českobudějovické beer, Budějovické beer, Chodské beer, Budějovické měš-
ťanský ferment, Štramberk ears, Znojmo beer, Karlovarský biscuit, Mariánskolázeň-
ské wafers, Hořické rolls, Brno beer, Starobrněnská beer, Lomnické biscuits, Březnic-
ký lager, Třeboňský carp, beer Černá hora, Pardubice gingerbread, South Bohemian
Niva, Czech beer, South Bohemian Golden Niva, Olomouc curd cheese, Chelčicko-
-Lhenické fruit, Karlovarský triangles and Karlovarský wafers and Valaský frgal.

ZTS – Spišska sausages, Lovecký salami, Špekáčky and Liptovský sausage.

Another traditional specialty seeking protection is Prague ham. Its application, ho-
wever, came under fire from Italy, Germany, Austria and Slovakia during the oppo-
sition hearing. Given the complexity of the negotiations, a three-month extension to
the deadline for the hearing was requested at the end of the year. The application to
register “Spreadable butter” was not recognized by the European Commission due
to the “small amount of fat in the butter.”

Organic food

The Ministry of Agriculture oversees the activities of inspection organizations and
checks them for compliance with applicable laws directly on organic farms or in organic
food production facilities. In the event that legal regulations are met, it issues a certifi-
cate to the inspection organization for the agricultural business concerned. The consu-
mer can identify certified organic food by the European BIO logo, by the origin of the
raw materials, the national BIO logo, and by the code of the inspection organization.

As of 31 December 2014 there were 510 registered organic food producers, of which
206 were farming facilities.

In 2014, MA's 10th annual information event for consumers “September – Organic
Food Month” was held.



Czech product – guaranteed by the Federation of the Food and Drink Industries CR – 2014

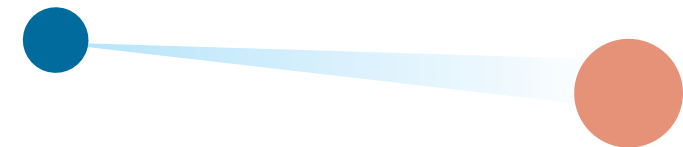
Since 2011, an initiative is carried out by the Federation of the Food and Drink Industries to promote Czech products by labelling them “Czech product – guaranteed by the Federation of the Food and Drink Industries CR”. The primary objective of this initiative was to support Czech foods and help consumers navigate their way in the food market. Products that carry this label fulfil the conditions for awarding it, which means they were produced in the Czech Republic using Czech materials (the exact conditions for awarding the label are set out in the Rules for Awarding the Label). The label is used in virtually every category of the food industry. It is approved by an independent commission based on an application and in accordance with the established principles and criteria, and it is awarded by the president of the Federation of the Food and Drink Industries CR. It is awarded for a period of three years. Products that received the label are randomly checked during this time and in the event serious deficiencies are detected, the label can be removed from the product. The complete documentation for the label is available on the website of the Federation of the Czech Republic www.foodnet.cz in the section “Czech product” label. Currently, the label is held by 59 companies, representing approximately 1,200 products.

Among the holders of the label “Czech product – guaranteed by the Federation of the Food and Drink Industries CR”, the category Other (a total of 10 companies) has the largest representation, followed by milk and dairy products (total of 9 companies), the category meat and meat products (total of 7 companies), and the category bakery and confectionery products (total of 7 companies). The label was awarded in all 14 categories over the course of three years.

a) Meat and meat products – 7 (Bidvest Kralupy s.r.o., Corax Trading s.r.o., Jaroslav Radoš, Josef Pelant, Kostelecké uzeniny a.s., MASO UZENINY PÍSEK, a.s., Masokombinát Polička, a.s.)

- b) Poultry and poultry products – 1 (Vodňanská drůbež, a.s.)
- c) Fish and fish products – 2 (Corax Trading s.r.o., Rybářství Kolář s.r.o.)
- d) Milk and dairy products – 9 (BOHEMILK, a.s., KONEKTA SAP, s.r.o., LACRUM Velké Meziříčí, s.r.o., MADETA a.s., Mlékárna Olešnice, RMD, Mlékárna Otínoves s.r.o., Moravia Lacto a.s., NIVA s.r.o., Povltavské mlékárny, a.s. / TPK spol. s r.o.)
- e) Eggs and egg products – 2 (BONECO, a.s., ZLATÁ VEJCE, a.s.)
- f) Soft drinks production – 4 (FONTANA WATERCOOLERS, s.r.o., Kofola a.s., Ludmila Kocourková, ŠUMAVSKÝ PRAMEN a.s.)
- g) Alcoholic beverages production – 2 (AGRODRUŽSTVO - družstvo NOVÝ ŠALDORF, PROQIN s.r.o.)
- h) Processing and preserving fruit, vegetables, potatoes, mushrooms, canned meat and pate – 6 (AGROSPOL Bolehošť, a.s., BONECO, a.s., efko cz s.r.o., FRITAGRO NÍŽKOV, s.r.o., HAMÉ s.r.o., PT servis konzervárna spol. s.r.o.)
- i) Unprocessed fruit, vegetables, potatoes, mushrooms – 6 (BuKo, s.r.o., ČESKÉ HOUBY a.s., Daniel Pech, FUNGHI CZ, a.s., Jan Hradecký, Jižní Morava a.s.)
- j) Bakery and confectionery products – 7 (BEAS, a.s., Jana Fialová, Jaroslav Schneider a spol.- PEKÁRNA TANVALD, Kompek, kombinát pekařské a cukrářské výroby, spol. s r.o., PENAM, a.s., POEX Velké Meziříčí, a.s., UNITED BAKERIES a.s.)
- k) Mill products and pasta – 2 (Mlýny J. Voženílek spol. s.r.o., Natura, a.s.)
- l) Frozen products – 3 (FRITAGRO NÍŽKOV, s.r.o., FrostFood a.s., TIPAFROST, a.s.)
- m) Delicatessen products – 2 (BONECO, a.s., GURMÁN KLUB, s.r.o.)
- n) Other fields not mentioned here – 10 (ALIKA a.s., Allivictus, s.r.o., CARLA spol. s.r.o., CATUS spol. s.r.o., HEINZ FOOD a.s., JIZERSKÉ PEKÁRNY spol. s.r.o., SEVAK star s.r.o., Tata Global Beverages Czech Republic a.s., Tereos TTD, a.s., Včelpo spol. s.r.o.)

Promoting the label and label holders is done throughout the year, namely through various activities. The label, company and its products are presented on various websites operated by FFDI. These especially include FOODNET (www.foodnet.cz), the Czech food website (www.ceskapotravina.net) or Find Your Producer (www.vyrobcifoodnet.cz). A catalogue of label holders and presentation



of individual companies and their products are also distributed through the newsletters of FFDI to all its members. To support increased awareness of new label holders, the awards are made at various festive occasions. *(Data on the performance of the food industry for 2014 are not yet available)*

To assess the performance of the food industry, it should be noted that industrial production representing total industry production grew by 0.5 % year on year in 2013. The annual result was mainly influenced by the fourth quarter. A somewhat higher annual growth of 1.4 % was recorded in the context of industrial production manufacturing.

In food production, the index of industrial production, according to preliminary data from CSO, was 99.9 and the beverage industry even 102.8 in comparison with the same period of the previous year. The contribution of both these production outlets to annual growth in industrial production was tentatively only 0.3 percentage points (the full contribution for the total industry reached 9.3 percentage points).

Sales of own products and services at current prices in the Czech Republic in the reference year 2013 for both evaluated outputs, i.e. food and beverages in total, for businesses with 50 or more employees, increased preliminarily by 0.7 % year-on-year, of which food products by 1.3 % and beverages on the contrary dropped by 1.6 %.

The total volume of sales in both assessed sectors in 2013 reached 242.3 billion CZK (189.4 billion CZK was reported for the production of food products and for the production of beverages it was 52.9 billion CZK). Higher sales growth was not achieved in 2013, despite the fact that there was an increase in the prices of industrial food producers. The possibility of a higher growth rate in sales was to some extent limited by food imports, especially by retail chains at competitive prices.

Prices for products and services in the manufacturing industry grew on average by only 0.2 % in 2013, but the prices of food products, beverages and tobacco, i.e. the product groups subject to this assessment, increased by up to 2.8 %. Only for food products, including related services and works, the prices have even increased by 3.5 %. Agricultural producer prices rose more significantly, by 4.5 %, and the consumer prices of food and non-alcoholic beverages grew the most, by 4.9 %.

An important group of products that significantly affected the dynamics of the increase in food prices, according to the increase in prices, was dairy products and ice cream, but industrial feed as well. The increase in prices concerned all groups of food products with the exception of bakery, confectionary and other flour-based products, which are subject to daily consumption where the pressure on distribution chains to maintain price levels was evident. Prices for beverages according to the index of industrial producer prices remained almost the same in 2013 (average from the beginning of the year 100.3).

Individual food production sectors, i.e. their group, represented by businesses with 50 or more employees, developed as follows in 2013:

The production of meat and meat products remained the key part of the food production structure in the reporting year although its position has been weakened. The volume of sales of own products and services and outputs, including business margins, saw this annual production decrease this year (by 3.2 %, or 2.8 %). The volume of beef and pork products dropped while there was only a slight increase in poultry meat production. A positive fact of the drop in output consumption enabled an increase in added value (expressing the difference between outputs, including trading margins and output consumption), which is one of the significant indicators of competitiveness. The sector suffers from a low concentration of slaughterhouse capacity, especially for pork, which is imported. It deals with some meat parts, primarily for the production of sausages, which have good sales when the quality is good. Unique products are applied to regional products as well.

Fish processing has remained a minority sector within the food production structure. The consumption of freshwater fish in the Czech Republic is only about 1.5 kg/person/year. Seasonality still persists in this sector, typically the Christmas season. Fish processing in 2013 was closely associated with producing it. The most popularly raised fish is carp with seasonal consumption. Seafood is forever imported. Modernization is supported along with a further expansion in processing capacity. Marketing and promotional activities help strengthen domestic demand for freshwater fish and the products made from them and the output of the sector has increased (volume of sales of own products and services grew by 5.4 %).

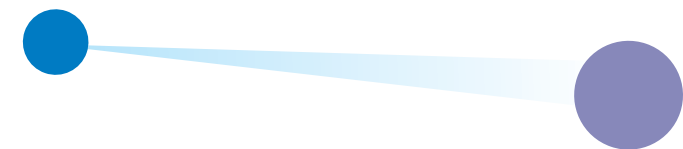
Processing fruit, vegetables and potatoes strengthened their position as a sector year on year in the year under review in 2013 in terms of performance levels (growth of sales of own products and services by 4.1 % and the growth of output, including a business margin of 4.9 %), while prices for processors increased. That development is in the context of the situation in the fruit harvest, where the crop increased year on year thanks to stone fruit with the exception of cherries and especially vegetables, whose production was higher and imports for processing in canneries grew. Development in the creation of added value basically stagnated due to the failure to decrease output consumption in the sector commensurate with the prices of inputs going up.

Processing vegetable and animal fats and oils in the reported year continued to grow in terms of output (as measured by the sale of own products and services) and efficiency (as measured by the carrying value added). This development is in the context of relatively high production concentrations and range of the specialization of companies in the sector. Apart from plant and animal fats and oils, canola processors used their capacity for producing rapeseed methyl ester, which was also subject to export.

The production of dairy products recorded a significant increase in output in 2013 (as measured by sales of own products and services increasing by 8.3 %) and efficiency (as measured by the carrying value added increasing by 6.3 %), which is in the context of a rise in the prices of dairy products, even with the prices for milk and other inputs increasing, which were reflected in a higher annual output consumption, which rose noticeably. The composition of domestic production changed for consumer products. The production of consumer milk, yogurt and other cultured products grew with demand for them growing, but the demand for other milk products stagnated, or decreased.

The production of cereal and starch products, where the production of cereal products predominate, weakened slightly in 2013, mostly because of cereal production (where sales of own products and services were down by 4.7 %), while sales for starch production were up by 12.1 %. An even more significant increase was achieved in starch production, where the value added indicator, which indicates the competitiveness of this production, shows that products based primarily on potatoes find wide application.





The production performance of bakery, confectionery and other flour-based products weakened in the reporting year of 2013 (as measured by sales of own products and services, which were significantly down by 13.8 %), while not making room for market chains to increase the prices of the industrial producers of bakery and confectionery products. Only part of the producers, with an assortment that has a typical regional character, had the opportunity to realize production at prices that allow them to be commercially successful in the field. This illustrates the same, i.e. negative trend for the indicator of carrying value added, even with lower output consumption representing inputs, which recorded only a slower pace of achieving savings despite stepped-up distribution throughout the week. The number of companies and their deployment in all regions puts the key sector in this situation, which is to say in serious danger for part of the corporate base.

The production of other food products like sugar, cocoa, chocolate and confectioneries, tea and coffee processing and other production, mainly in the phase of advanced processing (ready meals, homogenized and dietary food, etc.) weakened in terms of performance in the sector as measured by sales of own products and services in the year under review (-1.4 %). In this group, only the production of ready meals, whose assortment is expanding, and of cocoa, chocolate and confectioneries achieved significant growth dynamics. On the other hand, tea and coffee processing marked a more significant decline in this group. An annual drop was also recorded for the indicator of value added, with the exception of producing spices and flavours and the already-mentioned ready meals.


The production of ready feed, as measured by sales of own products and services, grew in performance year on year (2.0 %) in the context of a significant increase in the volume of sales of own products and services (39.7 %) for pet feed, which has been a trend in recent years. Similarly, a positive trend was also started for the indicator of value added in this sector, namely in the context of increased output, including trade margins, especially for feed for pet animals, as evidenced by a stronger competitiveness in the assessed sector.

The beverage industry as a whole recorded an annual decrease in performance as measured by sales of own products and services (1.6 %) and a moderate decline for the indicator of value added (1.1 %). For each production aspect of this group, the situation developed as follows:

- For beer, the trend of expanding the assortment of beers continued, from non-alcoholic to lagers and specialty and flavoured beers, especially in disposable containers, while there was an overall decline in beer consumption per capita; there was a drop especially for beer mixes. One of the ways to strengthen the volume of beer produced is to gradually develop closer cooperation between beer producers and restaurant facilities. The volume of beer produced in the reporting year rose by 0.6 % and stood at 19.3 million hectolitres;
- For spirits, consumer confidence was restored following a short period of prohibition (and other measures in 2012), and the strengthening of safety measures by producers of spirits resulted in a growth of sales of own products and also the indicator of the value added of this production;
- For wine, there was a slight drop in sales of own products and services in the reporting year in the context of an annual decrease in production and slight reduction in imports; a growth in value added was achieved thanks to a year on year decrease in output consumption, which is a positive result in terms of the efficiency and competitiveness of this production;
- For non-alcoholic beverages and mineral water and drinking water in bottles, the unfavourable trend of previous years continued in the reporting year for this sector; high-quality water kept up with market demand.

The total volume of sales of own products and services in 2013 for the production of food and beverages, as stated above, came to 242.3 billion CZK (100 %).

In 2013 the food industry employed a total of 100,100 workers, compared to 2012 when 103,300 workers were employed. This indicates a slight year on year drop. This reflects the continuous efforts of businesses to reduce costs and increase productivity in order to reduce costs due to the pressure of retailers to maintain prices while material costs continue to rise and a dropping demand. For the above reasons, the overall decline in the labour force basically affected most food sec-



tors. This trend deviates only for cereal and starch products, the production of dairy products and the production of vegetable and animal fats, where there was a slight recovery.

The trend of recent years concerning business structure did not continue in 2013, meaning growth in the number of businesses included in food and beverage production. Conversely, the total number of entities involved in this production was 18,317 (212 companies less year on year). Not all registered entities are, however, economically active.

Concerning individual firms in terms of legal forms, their number year on year was as follows:

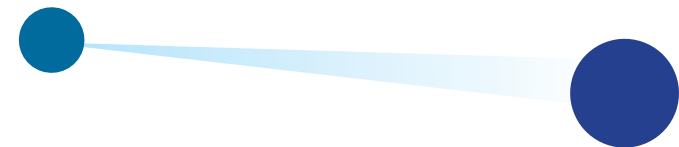
- The total number of entrepreneurs, most of whom operate under the Trade Act, grew quite significantly year on year in 2013, with an additional 607 entities making a total of 12,687. The pace of expansion of these entities is related to renewed demand for unique products in various regions. This is particularly evidenced among microbreweries;
- Significantly, limited liability companies led the number of the most represented legal form of companies, which corresponds to a simpler form of establishing and managing this type of capital company in comparison with other types of companies. In 2013, this form of company was registered for 3,703 entities, representing a further continuation of growth, with an increase of 172 companies year on year;
- The number of joint stock companies in 2013 stabilized. In 2013 there were 462 of this type of company (only 2 companies more year on year);
- Conversely, there was a reversal in the number of enterprises with foreign capital participation, where there was no further expansion in this number, rather a downward trend. At the end of 2013, there were only 1,227 of these entities registered, while in 2012 it was up to 2,220 (a decrease of 993 entities). This reversal indicates a worsening, or instability, of the business environment in 2013.

Unlike previous years, when the major category performance-wise (judged by the absolute volume of sales of own products and services) was represented by companies with 200-499 employees, this position was taken in 2013 by the category of companies with 100-199 employees, with a sales volume of 76.4 billion CZK. A smaller volume of these sales was achieved in 2013 by the aforementioned category of 200-499 employees, with 66.7 billion CZK. These two categories of businesses had the largest share of revenue among food and beverage producers from sales of own products and services, namely 66.0 %.

As in previous years, the highest number of companies was involved in the production of bakery and confectionery products, meat and meat products, and the production of other food products.

In 2014, food exports reached 103.6 billion crowns and beverages 14.3 billion crowns, i.e. a total increase of 8 billion crowns compared with 2013. Given the recent increase in imports totalling 11.8 billion, the trade balance was roughly negative as in 2013. The volume of the trade balance in 2014 for food products and beverages was -41.7 billion CZK, while in 2013 this figure was -28.1 billion CZK. A trade surplus was recorded only for dairy products, namely 5.6 billion CZK. For beverages, a surplus of 0.4 billion CZK was achieved in 2014, in comparison with 2.1 billion CZK in 2013.

In 2014, the export of food products achieved a significant year on year growth of 7.2 %, and for beverages it was even higher at 12.5 %. For food products, exports grew year on year for practically all product groups and especially for the dairy products group. There was also growth, e.g. for the rapeseed oil commodity (with low erucic acid content), for various food products, chocolate and other food preparations with cocoa, for beer and malt, sugar, sweet biscuits and wafers, sweets without cocoa and other commodities. The annual growth in food production imports in 2014 was 7.8 %, for beverages it rose to 10.4 %. All product groups had a share in the increase in imports, significantly the vegetable and animal oils and fats group. The main import commodities in 2014 included fresh, chilled or frozen pork or poultry often used as production meat, dairy products, especially cheese, and also chocolate, wine and other commodities.



The main export territory for these products in 2014, as in previous years, was Slovakia with a 29.8 % share. Like other countries in the reporting year, Germany followed with 13.9 %. Another neighbouring country was third in the list, namely Poland, whose share was 12.7 %. For other countries, the share of food exports is 5 % and less. The largest share of exports came from EU countries, i.e. trade within a single market (intra-business). Desirable, however, is to expand exports to so-called third countries.

For import territories, Germany had the largest share for food products in 2014 with 23 %. It was followed by Poland with 18.6 % and in third came Slovakia with 7.1 %. In terms of predominance, it is as true for imports as it is for exports, namely that the single market of the EU is the dominant factor.

The countries with the highest share of exports of beverages were: Slovakia (29.7 %), followed by Germany (17,2 %) a Poland (8,8 %).

The import of beverages in 2014 had the highest share of Germany (11.8 %), followed by Slovakia (11.2 %), and „wine country and cheese producers‘ Italy (10.2 %) and France (8.7 %). Followed countries with 5 % to 8 % and in other countries total fell to 29 %.

It is the same for exports and imports of beverages as it is for food in in terms of the dominance of trade that takes place within a single market. For beverages, the markets of third countries are also desirable, where commodities like beer and malt, cheese and others are thriving.

The main objective of growing the food industry must therefore be a significant increase in its efficiency and competitiveness not only in Europe but also in the world market. Furthermore, the conditions must be created for increasing the supply of safe, quality and affordable food to consumers.

With regard to the structural needs of the food industry, there must be further consolidation connected to the technological concentration of businesses on the one

hand, and the growth in importance of small and medium-sized enterprises on the other. The technological modernization of businesses must continue at the same time, primarily based on process innovation. The creation of conditions for obtaining the necessary investments must concurrently occur at the state level.

Individual food enterprises must exert emphasis not only on quality and safety, but also on carrying out much-needed product innovation. This trend must be primarily based on the results of applied research and development, for which it will be necessary to create the necessary resources in the state budget and in corporate budgets, accompanied by improving the transfer of this research. These individual steps make competitive product performance possible and must be accompanied by an increased emphasis on marketing Czech food production at home and abroad; by increased support for the export of products with higher added value (implementation of new export promotion measures). Equally important are measures in the area of consumer education for the benefit of consuming foods with a high proportion of Czech raw materials and organic food.

In terms of the external environment, we can expect the crisis to continue and the economic instability will be prospectively reflected in a reduced demand for food. Within the market for food products, there will be a more pronounced segmentation of demand, on the one hand, for cheap kinds of food among lower income groups, and on the other hand for quality with higher added value among the middle and upper classes. The reduction in sales will significantly affect all levels of the food chain (business – food industry – agricultural production) and will be reflected in increased pressure to reduce the prices of their inputs. In a result this will lead to the further implementation of austerity measures especially in the food industry, which will be directed towards increasing productivity and savings in the workforce. With increasing technological level, labour productivity will grow amidst higher demands on the qualifications of the workforce, but there will be a drop in the absolute number of workers. In terms of outlook of the Czech food industry in Europe, the strong risk of external factors can be expected (the emergence of new economies – China, India, growing competition from countries with lower costs, deepening globalization, increasing pre-

ssure from the foreign parent companies of retail chains to give preference to its own products, etc.).

In the event that the CR government's forward-looking concept in the food industry do not yield realistic recommendations or effective measures to correct its orientation and improve its capacity for innovation and also create a level playing field for the domestic and foreign market, there will be a significant deterioration in the business conditions in the field. Given the size and importance of this sector, this fact will have serious consequences for the Czech economy. The experience of EU countries shows that significant government support for research and development and a nutrition policy, coupled with support for improving the quality of life and focusing on products with higher added value, this situation can be avoided. The Federation of the Food and Drink Industries of the Czech Republic is providing full support for this trend not only in its daily activities, but also by creating and supporting the Czech Technology Platform for Foodstuffs.

Used information from the Report on the State of Agriculture in 2013 and the Panorama of the Food Industry 2013.



Data

Production of selected products

Food Products and Beverages	Measuring unit	2009	2010	2011	2012	2013
Beef, fresh or chilled	t	55 278	61 105	62 004	56 459	55 387
Pork, fresh or chilled	t	227 687	234 859	224 352	209 235	199 186
Poultry fresh or chilled	t	53 619	50 471	47 818	46 712	45 483
Poultry frozen	t	13 482	13 842	13 328	12 556	10 154
Potatoes prepared and preserved	t	111 584	114 927	97 605	93 729	85 241
Vegetables frozen	t	22 131	13 016	13 419	15 753	16 300
Preserves, jellies, marmalades	t	34 582	35 843	34 988	36 570	39 218
Milk and cream with a fat content up to 6%	1,000l	802 423	763 029	819 552	803 137	767 806
Milk and cream with a fat content exceeding 6%	1,000l	36 080	47 102	43 232	44 724	45 328
Butter	1,000l	41 719	37 580	40 174	36 400	40 047
Cheese and curd	t	122 609	134 466	142 901	145 590	157 916
Fermented dairy products	t	237 364	222 927	190 153	185 790	179 842
Wheat flour	t	709 797	744 929	756 131	755 156	732 623
Fresh bread	t	306 657	295 550	298 136	306 038	293 629
Fresh white bread	t	303 728	326 964	285 917	284 043	270 212
Pastry cakes	t	48 195	41 445	39 434	37 458	40 938
Refined Sugar	1,000t	444	446	517	550	586
Harvesting fish in lakes and flowing waters	1,000t	24,183	24,410	24,869	24,769	24,118
Spirits, liqueurs and other hard alcohol	1,000l	3 227	16 864	21 489	17 565	21 625
Wine from grapes, except sparkling wine, cider	1,000l	47 995	46 278	67 000	49 000	66 150
Beer	1,000hl	18 053	16 896	17 127	18 024	18 141
Mineral water and soda without additives	1,000hl	795 660	800 024	678 735	594 423	671 534
Other non-alcoholic beverages	million l	1,837	1,844	1,790	1,623	1,523

Note: (...) calculation based on 100% absolute alcohol

Export & Import of products for various sectors (most significant destinations)

Exports of selected commodities

Commodity	Year 2011		Year 2012		Year 2013		Year 2014	
	Country	Million CZK	Country	Million CZK	Country	Million CZK	Country	Million CZK
Wheat	Germany	3 106	Germany	5 734	Germany	6 673	Germany	9 071
Milk and dairy products (no cheese)	Germany	4 572	Germany	4 517	Germany	4 722	Germany	6 042
Vegetables	Slovakia	1 741	Slovakia	1 637	Slovakia	1 898	Slovakia	1 748
Butter and other fats derived from milk	Italy	141	Slovakia	107	Slovakia	137	Slovakia	221
Sugar	Austria	769	Austria	752	Austria	779	Austria	1 068
Eggs and egg yolks fresh, dried, etc.	Russia	184	Russia	279	Russia	326	Slovakia	56
Honey	Germany	67	Germany	44	Slovakia	40	Slovakia	40
Beef	Slovakia	281	Slovakia	339	Slovakia	359	Slovakia	447
Beer	Germany	961	Germany	1 103	Germany	1 210	Germany	1 341

Imports of selected commodities

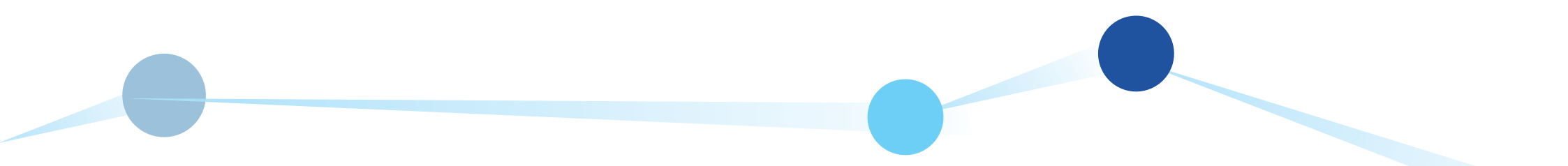
Commodity	Year 2011		Year 2012		Year 2013		Year 2014	
	Country	Million CZK	Country	Million CZK	Country	Million CZK	Country	Million CZK
Soft drinks	Slovakia	621	Slovakia	766	Slovakia	758	Slovakia	955
Fish, including shellfish	Norway	578	Norway	811	Norway	963	Norway	1 201
Rice	Italy	640	Italy	594	Italy	512	Italy	413
Spices	Vietnam	83	Poland	93	Poland	109	Poland	79
Tea	Poland	117	Poland	131	Poland	122	Poland	116
Animal, vegetable fats	Germany	1 534	Germany	1 463	Poland	2 840	Poland	3 716
Cocoa	Netherlands	976	Netherlands	748	Netherlands	781	Nizozemsko	1 336
Vegetables	Spain	2 002	Spain	2 026	Spain	2 167	Spain	2 174
Fruit and nuts	Spain	1 895	Italy	1 569	Spain	2 347	Spain	2 245
Coffee, not roasted	Brazil	546	Brazil	518	Brazil	324	Brazil	348
Alcoholic drinks	Italy	1 284	Italy	1 206	Italy	1 168	Italy	1 111

„Producers had changed to 90% of packaging by the end of the year...“

Markéta Chýlková, Head of the legislative department



LEGISLATION 2014
LEGISLATION 2014



The year 2014 was marked by intense changes in packaging, because on 13 December 2014 a regulation came into force requiring information be provided to food consumers. This year also saw the approval of a fairly major amendment to the Food Act and the Ministry of Agriculture began working on amendments to implementing legislation. The media, unfortunately, mixed up the obligations arising from the regulation and the obligations included in this amendment.

The theme of food was in the limelight of other platforms as well. At the end of the year, the General Directorate of Finance published guidance on the application of VAT when donating goods to food banks. It took more than a year for the activity of Food Helps without VAT to culminate to the point where Business for Society, together with the Czech Federation of Food Banks and the support of businesses and non-profit organizations (among them FFDI CR), could argue that food donated to charity need not pay VAT. Companies will now be able to donate foodstuffs to food banks that are no longer marketable but which can still be consumed at a fraction of the price, i.e. at a value approaching zero.

New European regulation for gluten-free foods

In mid-2014, a new implementing regulation on the requirements for providing information

about the absence or reduction in the content of gluten in food to consumers was published in the EU's Official Journal. The regulation will be applicable starting on 20 July 2016 and allows food that is specially produced, prepared and/or processed to contain a reduced content of gluten in one or several ingredients containing gluten or to replace ingredients containing gluten with other naturally gluten-free ingredients to be labelled to indicate either the absence of gluten ("gluten-free") or low-gluten content ("very low gluten") in accordance with the provisions of this regulation. It allows information such as "suitable for people intolerant to gluten" or "suitable for coeliacs", "specially prepared for people intolerant to gluten" or "specially prepared for celiac". The limit is maintained at 20 mg/kg.

This regulation will additionally allow food containing ingredients that are naturally gluten-free to be labelled to indicate the absence of gluten in accordance with the provisions of this regulation and if the general conditions for providing accurate information set out in the regulation on the provision of food information to consumers are met.

The legislative process is still ongoing...

...and regulations in the area of improving substances in foodstuffs and regulations governing the use of health claims were also

published last year in the Official Journal of the European Union.

A revision of the list of authorized additives was ongoing. The use of Advantam as a sweetener was approved. Changes were made to the conditions for using pyrophosphates (E 450) as leavening agents and acidity regulators in ready-to-go yeast dough and to the conditions for the use of sweeteners in some fruit or vegetable spreads and the conditions for dihydrogen diphosphate magnesium and its use as a leavening agent and acidity regulator, etc.

There was also a change concerning aromas, namely in Annex I to Regulation (EC) 1334/2008 with regards to certain aromatic substances and the removal of some aromatic substances from the Union's list.

During 2014, new health claims were permitted concerning the reduction of the risk of disease or the development and health of children.

In the past year, certain foods or food ingredients of novel foods were permitted. This means, for example, that citicoline, protein canola oil, oil from microseaweed, Schizochytrium or coriander seed oil can be placed on the market.

Federation of the Food and Drink Industries CR as a mediator

FFDI played an important role last year in clarifying the rules for labelling, both in relation to the supervisory authorities and in relation to the Ministry of Agriculture. The situation in the legal environment, which is concerned with labelling and food production, remains complicated by the fact that no document was issued on either the European or national level that would facilitate guidance in the new rules, which offer regulation on the provision of food information to consumers.

At the beginning of the year, therefore, FFDI published an electronic manual “Questions and answers to Regulation (EU) 1169/2011 on the provision of food information to consumers” and in the course of the year, it went beyond its scope to adopt and spread among producers a whole range of new opinions of CAFIA and the Ministry of Agriculture. At the end of the year, DG MARE published a pocket guide for labelling fish: “A pocket guide to the EU’s new fish and aquaculture consumer labels”.

Despite all the obstacles with new labelling rules, producers fared rather well and by the end of 2014 had managed to change up to 90% of food packages placed on the market.

The amendment to the Food Act

The chamber of deputies passed a new amendment to the Food Act on 14 May 2014. It was adopted on

18 June at a meeting of the Senate and the law was published in the Book of Statutes on 22 July under no. 139/2014. It came into force on 1 January 2015.

It was necessary to remove requirements from the original law that were regulated by European legislation, and at the same time it was necessary to incorporate labelling requirements other than those for packaged foods. The amendment raised a variety of concerns especially among businessmen, because among other things it focused on the issue of labelling unpackaged foods. Still, the amendment to the Food Act was drastically slimmed down; for example, a number of new obligations were passed for unpackaged foods, which member states can adopt within the limits of the regulation for providing food information to consumers (labelling of the producer or main ingredients). Quite independently of European legislation, the Ministry of Agriculture then proposed disclosure requirements with regard to food from other countries being offered to consumers in this country.

In connection with the amendment to the Food Act, the Ministry of Agriculture acceded to various amendments to the implementing legislation at the end of the year. By the end of the year the draft of a new decree on the method for labelling foodstuffs and a draft for a decree on the requirements for milk and dairy products, ice cream and edible fats and oils had been submitted for consultation.

Environmental protection

Legislation governing the protection of the environment is a substantial part of the legal code that affects all food business operators to a greater or lesser extent. Last year the Ministry of Environment submitted for interdepartmental consultation a draft of a government regulation on the Waste Management Plan of the Czech Republic for 2015 – 2024, an amendment on assessing environmental impacts, an outline of a completely new Waste Act, and the draft of a decree stipulating the scope and method of ensuring the separate accumulation of components of municipal waste, the main objective of which is to set the rules and minimum requirements for municipalities, which should lead to the greater sorting of the individual components of municipal waste (which at the end of the year was also published in the Book of Statutes).

A revision of the Packaging Directive and revision of the Waste Framework Directive were discussed on the European level in connection with a circulating economy, and within them a number of not only fundamental, but also completely new themes were initiated, starting with the definition of food waste and continuing up to increasing recycling targets. FFDI has quite a strong opinion on these revisions and joined the Ministry of Environment in formulating the position of the Czech Republic.

In this area, FFDI was also in contact with Czech MEPs in the European Parliament.

Amendment to the Act on Significant Market Power still not in sight

Efforts to amend the act on significant market power have been going on for several years. An attempt to completely repeal the act has been abandoned; the last draft of the amendment was submitted in the spring of 2014. The aim of the amendment was to clearly define the circle of relationships affected by the law, thereby removing doubts among certain entities on the market about whether or not they fall within its scope. The amendment should also provide more precise definitions of the terms “supplier” and “customer” and it proposes a relatively new type of customers, namely purchasing alliances. The present proposal also responded to the current European food law and began to use the term “food”, which de facto means all agricultural and food products referred to in the title of the law. It newly sets the particulars of a contract and the contractual relationship will be based on a written agreement, including determining who is responsible for this legal act, which should result in greater legal certainty. Despite all the positive changes in the proposed law, however, the amendment contained one point where an agreement could not be reached in principle, namely extending the scope of the law to suppliers as well.

In June, a hearing was held on the draft amendment and since that time, the amendment has had to wait, so far without any success, before the government to “act on it”. Also without success by the

end of the year was the effort of the Commerce and Tourism Association of CR to have the amendment withdrawn and the entire law repealed, as well as FFDI’s attempt for a return to unilateralism.



„2014 was again energized with the healthy lifestyle and the Federation intensively offered its support...“

Iva Caklová, Department of the Administrative and Project Activities



FFDI SUPPORTS A HEALTHY LIFESTYLE
FFDI SUPPORTS A HEALTHY LIFESTYLE

Health, healthy lifestyle, good eating habits, physical activity, chronic non-infectious diseases related to nutrition, overweight and obesity prevention and more are themes that have been reflected across all media on an almost daily basis. Even the Federation has been involved in these issues for a long time and devotes considerable attention to them.

A working group for a healthy lifestyle started up in 2007 and for the last years under the direction of Martin Klofanda of Kofola ČeskoSlovensko a.s., and its members are representatives of production companies and several sectorial unions. This group is closely linked with the working group for a healthy lifestyle of the Czech Technology Platform on Food, which brings together representatives of the professional community. These groups have one thing in common; their priority is the promotion of a healthy lifestyle i.e. most of all good eating habits and increase the physical activity of different groups of the population and thus prevent overweight conditions and obesity and related health problems. The major activities of the Federation include the project Living and Playing Healthily, which is meant for primary school pupils, and the Smart Life project designed for secondary school. The international project NU-AGE, whose target group is the 65+ age category, also continued, as well as promoting postgraduate

training in obesity for designated professionals, especially doctors.

But it is not just projects. Within the field of health, the Federation actively cooperates with other major players and institutions such as the Ministry of Health, National Institute of Health, Society for Nutrition, etc. Since the autumn of 2014, for example, the Federation has been actively involved in the preparation of an Action Plan for Proper Nutrition and Action Plan against obesity, whose preparation has been entrusted to a working group of the Ministry of Health.

In 2014, already the eighth annual interactive healthy lifestyle course Living and Playing Healthily was launched at www.soutez.hravezijzdrave.cz. The primary target group of the project is primary schools. The secondary group of the project consists of primary school teachers, who are an important element, especially in motivation and communication. Finally, the project also addresses parents and professionals. The competition part of the course is intended only for pupils from the fifth grade, but anyone can complete the course on a non-competitive basis.

The main objective of Living and Playing Healthily is to use the Internet to provide

Hravě žij zdravě

MILÍ KAMARÁDI!

8 ročník soutěže

Je to tak, po prázdninách se již poosmě otevře internetový kurz zdravého životního stylu **HRAVĚ ŽIJ ZDRAVĚ!** Soutěžní část kurzu je určena kolektivům pátých ročníků základních škol. Vyhrává nejlépejší třída z každého kraje ČR a odměny jsou připraveny i pro vaše učitele, kteří celou třídu do kurzu registrují!

Čekají na vás čtyři lekce s informacemi, jak si vybudovat a udržet aktivní a zdravý životní styl. Naučené věci si procvičíte na zajímavých úkolech, řešením hádanek a zábavných spojovaček. Za každý splněný úkol z lekce pak sbíráte cenné body. Navíc si můžete vést vlastní kontrolní jídelníček, posílat nám třídní recepty a návody, jak vaše třída žije aktivně a zdravě.

NEJLEPŠÍ PÁTÁ TRÍDA Z KAŽDEHO KRAJE ČR ZISKÁVÁ PĚKNÉ CENY OD NAŠICH PARTNERŮ!

SOUTEZ ZAČÍNÁ 22. 9. 2014 A UKONČENA BUDE 31. 12. 2014.

Nesoutěžně však kurzem může projít každý, kdo chce zlepšit svůj životní styl. Více informací hledejte na WWW.SOUTEZ.HRAVEZIJZDRAVE.CZ, kde jsou uvedeny veškeré informace o kurzu i výhrách!

S Hravě žij zdravě zjistíte, jak snadné je žít aktivně a zdravě!

HRY, ZÁBAVA, POZNÁNÍ A SOUTEZ PRO PÁTÉ TRÍDY ZÁKLADNÍCH ŠKOL V JEDNOM INTERNETOVÉM KURZU ZDRAVĚHO ŽIVOTNÍHO STYLŮ!

PODPRÁVAŘKA KOFOLA ČESKO-SLOVENSKO
MŠMT
STOR
Záštita projektu
Garanti



The awards, Krucemburk Elementary School - 5th class

information in a playful manner with the goal of changing the attitudes and behaviour of pupils in receiving and releasing energy, i.e. an effort to change poor eating habits, improve drinking habits and increase physical activity among children and thus prevent them from becoming overweight and obese. Its uniqueness lies in the combination of theoretical knowledge with practice. Although it is an internet course, students are required to use the computer for it no more than 15 minutes a day. The course is designed as a competition between classes, and has been positively appreciated by both teachers and pupils. The popularity of the course is evidenced by the fact that roughly 57,000 primary school pupils have taken part in it during the eight years. Also successful is the continuation of the course "Easily Live Healthily" in Slovakia, where it was

held under the auspices of the Federation of Food and Drink Industries of Slovakia. Prizes in the form of sled discs were donated by the company Plastkon product LLC.

From September to December 2014, the 8th annual course competition was held involving 5,796 children and 498 teachers from all over the Czech Republic. The most registered classes were from Central Bohemia, Moravia-Silesia, South Moravia and the Ústí Region. The winning class was 5.A of the Three Axes Primary School in the Karlovy Vary region, and second place went to 5.D of the 26th Pilsner primary school in the Pilsen region, and in third place was 5.A of the Rough Rock Primary School – Doubravice from the Liberec Region.

held under the auspices of the Federation of Food and Drink Industries of Slovakia.

In 2014, the project Living and Playing Healthily was subsidized by the Ministry of Health: National Health Programme – Health Promotion Projects, amounting to 140,000 CZK. The second part of the budget was funded by the Federation of the Food and Drink Industries from the resources of the working group for a healthy lifestyle. The experts in charge of

The Federation intends to promote the course Living and Playing Healthily in the period to come. As every year, the next competition is planned for the beginning of September 2015.



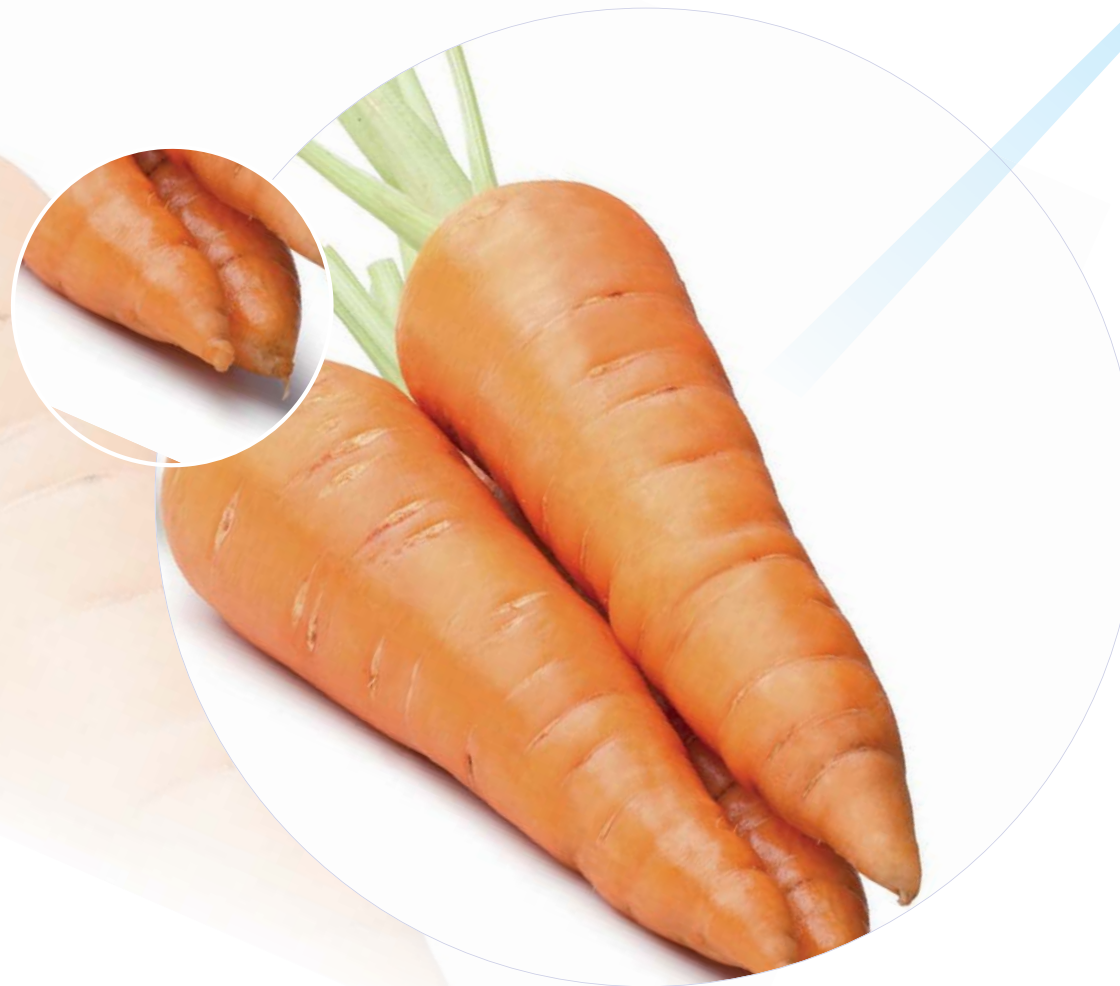
A relatively new project is Smart Life, the preparation of which was begun in late 2011. The origin of the project was largely influenced by the course Living and Playing Healthily. The Federation wanted to prepare a project that reached out to one of the most difficult of target groups, namely teenagers.

The main goal of the project was and is to attract young people to health issues and a healthy lifestyle, to familiarize them with the principles of good nutrition, physical activity and regeneration through the provision of valid information, and to motivate them to change their behaviour, or at least to think about their current way of life. The Smart Life competition is betting on the potential and power of the collective and on the use of modern communication tools and applications that the young generation uses every day. The success of the first year resulted in shifting the competition more into the online environment and in communicating on social networks. This approach paid off in the results

of the second year. The use of proper communication environments (websites www.smartlifesoutez.cz and especially social networks), a modern, fun and creative form of competition, plus the involvement of the right ambassadors, which were members of the 2014 national football team, made the second year a great success. In addition to the students who signed up, the project managed to reach out to and engage, especially through Facebook, a large number of other users.

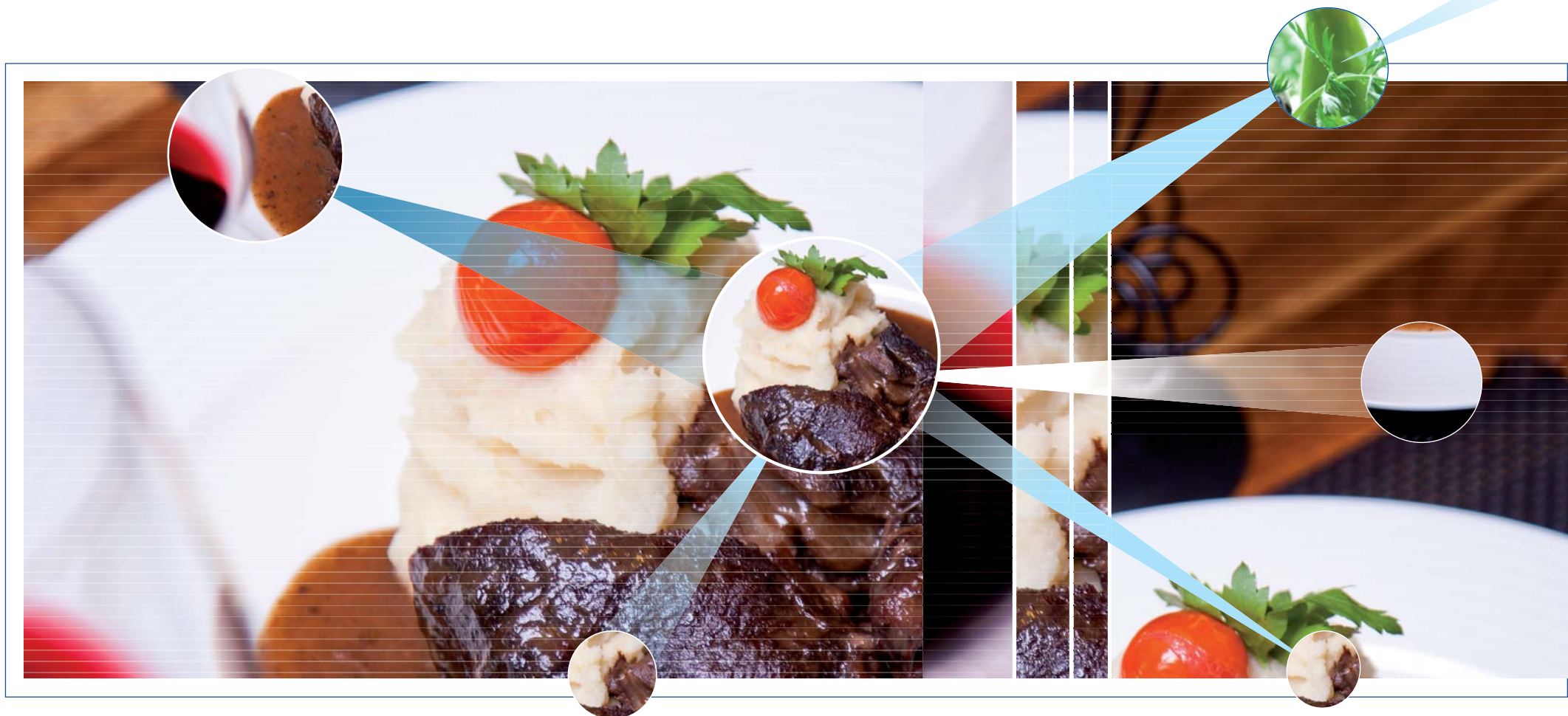
The same as last year, the second annual Smart Life competition took place from November to December, with included the involvement of 37 classes of secondary schools in the Czech Republic, representing 607 students. During the course of the competition, students completed both individual and team tasks, for which they collected the required points for themselves and for their classes. The winners of the second year were the students of class 3.L of the Secondary Pedagogical School, gymnasium and community college of Karlovy Vary, class 2.A2 of the Silesian Gymnasium Opava, and class 4.B of the Gymnasium of Jaroslav Heyrovský in Prague 5. The three or four students with the highest number of points were also mentioned.

More information about the project is available at www.smartlifesoutez.cz and the Facebook page of the project.



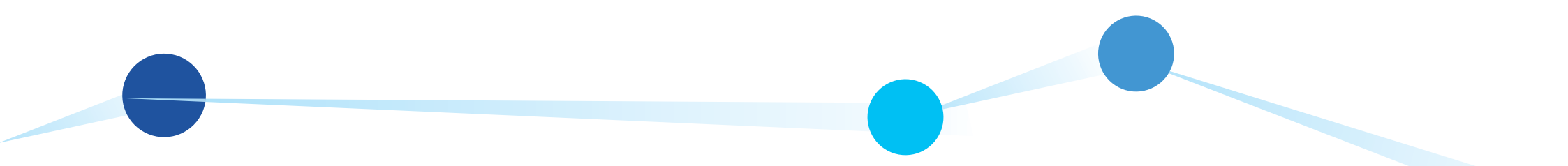
„The Federation of the Food and Drink Industries CR provides regular information about its activities, attitudes, beliefs and opinions, not only to representatives of the media, but also to the professional and lay public.“

Dana Večeřová, Director of Communications



COMMUNICATIONS AND EXTERNAL RELATIONS

COMMUNICATIONS AND EXTERNAL RELATIONS



During 2014, the communications of the Federation of the Food and Drink Industries CR focused mainly on the quality and origin of food especially in relation to imports of low-quality food from abroad, but also in connection with preparing an amendment to the Food Act. In August 2014, the Federation became fully engaged in intensive communication regarding the announced Russian sanctions, which from the beginning it warned that such sanctions would have a strong negative impact on the Czech food sector, primarily by interrupting promising exports and secondarily by opening our market to surpluses from other countries unable to export to the Russian Federation.

Improvements continue to be made in the flow of information within the Federation, as well as externally, mainly towards the relevant public institutions and supervisory authorities. The number of visitors to the official website of the Federation has grown thanks to the enlargement of the content at (www.foodnet.cz), in addition to promoting and inserting updated information. We have noticed more traffic on the website of the Czech Technology Platform for Foodstuffs (www.ctpp.cz) and the subsidiary of FFDI, FOODSERVIS s.r.o. (www.foodservis.cz). Also the new website – www.vyrobci.foodnet.cz, which contains a list and information about food producers and their products by region and by their quality labels, and the website www.ceskapotravina.net with exclusive information on the Czech foods and products, new items on the market or about the Czech Product label – guarante-

ed by the Federation of the Food and Drink Industries CR, KLASA and Regional Food have found a number of visitors and supporters during the short period of their existence. A website <http://normy.foodnet.cz> was newly established to provide information about recently formulated guild standards, which would determine the quality parameters and premium characteristics of food products that make a given product different from other comparable products on the market.

Reports on activities, seminars and Federation events, in addition to press releases and opinions, are regularly published in the media focused on food (Food World, Retail Info Plus, Goods&Sales etc.), as well as in trade weeklies like Euro, The Economist, daily newspapers (E15. idnes.cz) and television news.

In 2014 there were a total of 10 press releases, which responded to the latest developments in the food sector; FFDI CR was regularly quoted in the news of Czech Television and in other media, mainly newspapers – Právo, MF Dnes, Lidové noviny and Hospodářské noviny. Representatives of the Federation annually take part in more than 75 events, interviews on television, radio, conferences and seminars, where they present the views and opinions of the Federation of the Food and Drink Industries CR. During 2014, meetings were also held with journalists during regular monthly intervals, where the new project of the Federation of the Food and Drink Industries was mainly presented focusing on European protected labelling, but also the test

results of food and the current problems or questions about the food sector.

Work also continued on publishing the magazine Food World, which is supported by the Federation of the Food and Drink Industries CR. It is a monthly magazine focused on supporting Czech food products, the main objective of which is to motivate consumers to prefer Czech food products and to better orient them in a wide selection of food products.



The column “We tested it for you”, which focuses on chemical-physical and sensory tests of food, was expanded in terms of the number of samples tested, and the tests continued to be carried out in collaboration with MF Dnes. In connection with this section, regular cooperation with the show Home Alone on CT1 also continued, where test results are presented and information about food provided.

Regular cooperation with the daily Právo also continued in 2014, where six times during the year the Federation provided full-page articles for the Saturday edition with information about the label Czech Product – guaranteed by FFDI CR, about individual award-winning products, and about their producers. In addition, it was possible during the year to publish in Právo the comments and reflections of FFDI representatives on the current affairs in legislation and the entire food industry. Due to the success of this promotion, we expect it to continue in the coming year.



As for presentation at events, the Federation took part in the international food fair SALIMA in Brno 25 – 28 February 2014 and in the international agricultural and food fair Bread Basket in České Budějovice from 27 August – 2 September 2014. The Federation's exhibit was conceived as to be open to both members and those interested in food issues. As in previous years, tastings were held at Bread Basket for members with products that carried the KLASA quality label, and also for products with regional designations. The presentation of products that were awarded the logo of Czech product – guaranteed by the Federation of the Food and Drink Industries also continued within the framework of the project to support and promote quality Czech products. In addition, certificates authorizing the use of this logo were awarded to other producers during the ceremonial opening of the exhibition Bread Basket. We are, of course, prepared to continue this form of presentations of our members at various occasions in the future.



PROJECTS OF THE FFDI IN 2014



Šárka Štejnarová, Department of the Administrative and Project Activities
Iva Čaklová, Department of the Administrative and Project Activities

PROJECTS with EU financial contribution:



No. 266486

NU-AGE

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



NuAge, meeting in October 2014, Greece

The partnership in the SP.E.S. GEIE consortium represents amongst others for FFDI the participation in a consortium of an integrated project presented by the University of Bologna, in addition to 31 entities from among national food and beverage federations, businesses, institutions of tertiary education, and research organizations. Thanks to its many years of cooperation with the SP.E.S. GEIE consortium, FFDI has managed

to promote partnership for the company Zeelandia, spol. s.r.o. The official start date of the five-year project with the budget exceeding € 12 million was May 1, 2011.

In the year of 2014, a further review was carried out with further collecting data of the eating habits of the over-65 population in CR and on expanding the platform of food industry businesses forming the basis for the transfer of knowledge and feedback. FFDI CR shared in defining educational material for upcoming events and together with EUFIC (European Food Information Council) prepared material for the project newsletter and worked actively to disseminate it as part of the relevant work package for the project and processed national data for the market analysis within the project.

In the reporting period, FFDI CR attended the September annual meeting, which were synergized with leading partners in the activities of dissemination, management and copyright protection.



No. 285820

SAFE-BAG

Innovative packaging system with decontamination capabilities for fresh fruit and vegetables, in the sense of an alternation of chlorine disinfection (Safe-bag)

At the end of 2014 the realization of the three-year 7th EU FP project was successfully completed from the category Research for the benefit of SME associations,



SafeBag, meeting in June 2014, Ireland

Safe-bag, that was officially launched in September 2011 in the composition of an eleven-member consortium led by the Spanish Institute IRIS (Innovació i Recerca Industrial i Sostenible). A total of 4 MSP associations were accepted with IRIS in the partnership of the project Safe-Bag (FFDI CR, FIAA – the Food Industry Association of Austria, Turkish SETBIR – Union of dairy, beef, food industrialists and producers of Turkey, and Slovenian GZS – Chamber of Commerce and Industry of Slovenia – Chamber of agricultural and food enterprises), 2 RTD (Irish DIT – Dublin Institute of Technology, DCU – Dublin City University), and 4 other institutions (from VB FM/ FM Foods Ltd., the Irish Nature/Nature's Best, Spanish Verdi/Verdifresh and the Italian OSV/OSV Srl.).



SafeBag, meeting in November 2014, Spain

The project aimed to develop an innovative packaging system with decontamination capabilities for fresh produce, based on the current research results achieved by DIT / Dublin Institute of Technology, while plasma technology has been effectively used in the packaging process of decontaminating products only at the laboratory level. Plasma (ionized gas energy) is widely used in the processing of industrial materials and has recently proved to be a promising tool for decontamination and has shown the ability to remove pathogenic bacteria on the surface of many foodstuffs, and a wide variety of foods and beverages.

A prototype packaging system with decontamination capabilities was designed and created over the course of the project, and its effectiveness for freshly packed salads, fruits or vegetables was positively and continuously evaluated by the industry also at the end of the project. The system allows for the new creation of short-living radicals (like “singlet oxygen”) within a clo-

sed container, leading to the extinction of microorganisms, after which this gas will help the original form and composition of the food to return.

The impact of the Safe-Bag system project will mean (at the moment of contact with the market) considerable health benefits thanks to the safe and assured choice of food by the consumer, extending the shelf life of food and increasing the demands for fresh products, which will bring a very positive impact on the competitiveness of producers of the above type of fresh food.

From its position of leadership within the project, FFDI has been responsible for creating the official website, issuing leaflets and posters for the project, training material and an online training tool for the business community.

In addition to technical and financial reporting, resulting from the leading role of FFDI CR, the further annual newsletter documenting the scientific progress of the project and the PUDF (practical plan for future use and dissemination of outputs/knowledge of the project) were prepared during the observed year, and in collaboration with the IRIS Business Plan. The task of managing and updating the websites of the project was retained, i.e. Redmine. Finally, the cooperation with IRIS in carrying out demonstration activities was strengthened and with FlaA for copyright protection and management of the project. In June and November 2014, FFDI presented its work to DIT and IRIS partners during meetings of the consortium on the management of the project. Several demonstrations of the resulting prototype of the project in the areas

of industry took place in 2014, at a seminar for domestic producers of evacuated fruits and vegetables.



No. 289327

FOODMANUFUTURE

Draft concept of food research infrastructure to accelerate innovation in the food industry (FOODMANUFUTURE)

The EU FP7 project, FOODMANUFUTURE, began on 1 January 2012. Its inclusion in the category of Coordination and Support Action was designed to prepare a draft conceptual study for basic decisions about the research infrastructure of European food research. The research infrastructure was targeted toward accelerating innovation in the food sector by using cutting-edge research involving the transfer of knowledge and motivation toward education. The project completed as of December 31, 2014 was performed through the activities of the participants from industry, academia, public and private entities in the food sector, and production technologies to meet the needs of small, medium and large enterprises with a multi-disciplinary approach of a European dimension. The consortium was based on a broad network of public and private bodies active in the ETP FOOD FOR LIFE. The role of coordinator was filled by Aalborg University in Denmark. FFDI was connected through the SPES GEIE consortium.

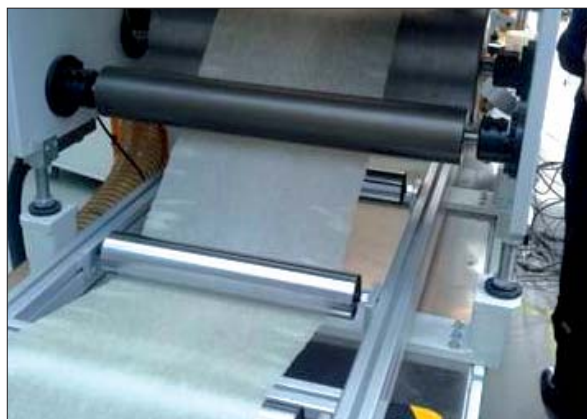
In cooperation with project partners, FFDI CR actively participated in the past in the creation of an electronic brochure of the project, a translation into Czech, and the graphic design of the brochure in 10 national/partner versions. It also cooperated in compiling press releases.



No. 315313

BIOBOARD

The development of durable paper and cardboard surface systems based on proteins, with the goal of improving the recyclability of food and beverage packaging materials (BIOBOARD)



BioBoard, meeting in April 2014, Germany

In 2014, for the second year, FFDI was one of 14 members of the consortium under the auspices of the IRIS coordinator for the project of the category Research for benefit of SMEs. One of the main objectives is to



BioBoard, meeting in April 2014, Germany II.

develop a series of bio-coatings and composites and the methods of their manufacture for use on paper, cardboard and cartons for the purpose of replacing conventional plastics based on fossil fuels (polyethylene) in laminated packaging materials. The project is based on previous studies that show that coatings based on ani-



BioBoard, meeting in April 2014, Germany III.

mal proteins, such as coatings based on whey proteins or vegetable proteins, like wheat gluten, soy protein and zein rye, can form biodegradable plastic layers, which can replace current plastic layers used in multilayer packaging and improve their recyclability.

In the reporting period, FFDI CR attended the April and September meeting, which were also synergized with leading partners in the activities of dissemination, management and copyright protection. Furthermore, its task further included taking a survey of FFDI members to define new materials and relevant production conditions.



No. 312029

COMPETE

International comparison of supply chains in the agro-food sector in the context of finding the key factors of their competitiveness and behaviour on the European and international markets (COMPETE)

Since October 2012, FFDI CR has taken on a partner role in a ten-member consortium under the auspices of the coordinator of the three-year project, Leibniz Institut Fuer Agrarentwicklung in Mittel und Osteuropa.

The project aims to provide innovative and consistent evaluations of the competitiveness of European food retailers through the integration of various approaches.

On this basis, the research results make it possible to draw up a compatible, coherent and consistent set of policy recommendations with the goal of improving competitiveness and promoting a knowledge-based bio-economy in Europe. The analysis is performed on two levels: on the concept and indicators of competitiveness and on its key factors.

In June last year, FFDI attended meetings of the project management and collaborated on the activities of dissemination and communication. In November it further cooperated on organizing meetings, including a roundtable that took place with invited representatives of the Czech food industry in Prague.



No. 289397
TERIFIQ

Merging technology to achieve a significant, binary decline in the content of sodium, fat and sugar in the daily diet, while optimizing the quality of their nutritional values (TeRiFiQ)

Through its membership in the consortium S.P.E.S., FFDI has filled a mediating partnership role since January 2012 in the 17-member consortium of the four-year project of the FP7 Cooperation program.

The main objective of the TeRiFiQ project is to achieve a significant, binary (salt and fat or fat and sugar) reduction in the levels of sodium, sugar and fat in some cheeses (hard, semi-hard, soft), meat (cooked and non-perishable sausages), pastries (muffins) and preparations (sauces) while maintaining and, if possible, increasing the nutritional and sensory properties of these products to ensure full customer satisfaction.

During the reporting year, FFDI CR carried out many dissemination activities.



No. IEE/12/768/SI2.645921

FABbiogas
Production of biogas from organic waste in the European food and beverage industry (FABbiogas)

University of Natural Resources and Life Sciences, Vienna, Department for Agrobiotechnology, is the project coordinator to a period of 30 months. One of the outlined project goals is to provide aid for food businesses with waste management and disposal, while increasing the protection of the environment and reducing production costs.

FFDI CR went from a leading role in the fifth work package (WP 5) in 2014 to oversee amongst others

a survey among the membership in terms of a potential investor in biogas and producer interested in biogas application, the participation of an employee in three-day external training (organized by a national member EBA – Biogas Association), under the auspices of advisory services to people/businesses with an interest in investing in biogas production or an offer of organic waste to produce biogas, etc.

In June and October 2014, FFDI CR attended a meeting on project management and cooperated on the activities of WP 5, on dissemination and communication. On the occasion of the October meeting, a representative of the Federation provided an article at the co-organized conference of the coordinator “BiogasScience 2014” (<http://biogas2014.boku.ac.at/>).



No. IEE/12/768/SI2.645921

“Laboratory” for ensuring the transfer of skills in the European food industry with the aim of stimulating entrepreneurial skills, encouraging innovation and creating new business opportunities in the food industry (FoodLab)

With a successfully prepared project submitted to the EC at the end of April 2014, the Federation became one of the partners of Erasmus+, FoodLab, and on 1

January 2015 the 36 months of its phase of meeting the demarcated targets began. In addition to the project coordinator (Commerce and Industry Federation Vaucluse) the activities will involve partners Ecole Nationale Supérieure de Chimie et de Physique de Bordeaux, ISARA Lyon, Universidad politécnica de Valencia, Università cattolica del sacro cuore, Università degli studi di Torino, Campden BRI Magyarorszag, Creaciones Aromáticas Industriales S.A., Delidess, VINIDEA and SP.E.S. (Association of national food associations, namely FFDI CR, ANIA/France, FEDERALIMENTARE/Italy, FIAB/Spain, GZS/Slovenia).



Leonardo da Vinci Program

Under the Lifelong Learning Programme the Leonardo da Vinci programme is focused on the teaching and learning needs of all those in vocational education and training on a level other than at university and institutions and organizations providing or facilitating such education and training. The programme contributes to increasing the attractiveness, quality and performance of vocational education and training, to improving the transparency of information and advisory systems, to recognizing competences and qualifications, and to strengthening European dimensions. Further the programme affects initiatives to promote further development, testing and implementation of common European tools for vocational education and training.



CZ/13/LLP-LdV/PS/P/134070

AIFooST

Full name of the project: Analysis for Improvement of Food Safety Training in the Food and Agricultural Sector

The Project AIFooST is part of the Leonardo da Vinci – Partnerships programme. The duration of the project is 24 months, i.e. from 01/08/2013 to 31/07/2015. The project is funded by the European Commission’s Lifelong Learning Programme 2013.

The project aims to create an international community composed of companies and organizations from the agro-food sector, from hygiene, food safety and professional training with the goal of sharing experiences and cooperation in the framework of a common interest, which is: “Training workers in the agro-food sector in order to improve food safety.” The main output of the project will be an AIFooST Guide – a guide for managers and employees responsible for training and educating employees. This guide should summarize basic information on the good practices of training in hygiene and food safety.

The consortium consists of these partners: BETELGEUX, SL (Spain), the Austrian Technology Platform on Food (Austria), FFDI CR (Czech Republic) and the University of PORTO (Portugal). The project coordinator is BETELGEUX, SL (Spain).

In 2014, there were two joint meetings of the project partners. The first was held in Vienna in May and the other in Prague in September. The theme of the meetings was mainly working together on AIFooST Guide.

More information about the project can be found at www.betelgeux.es/proyectos/aifoot, www.foodnet.cz and www.ctpp.cz.



AIFooST - meeting in Austria (Vienna)



2013-1-ES1-LEO05-67282

Open New Food

Full name of the project: Open Innovation for New Food Product Development in the European Food Industries

The Open New Food project is part of the Leonardo da Vinci – Transfer of Innovation programme. The duration of the project is 24 months, i.e. from 01/10/2013 to 30/09/2015. The project is funded by the European Commission’s Lifelong Learning Programme 2013.

The main objective of this project is to increase the awareness and skills of managers of small and medium-sized enterprises (SMEs) of the food industry on the possibilities of cooperation in the development of new food products. This will greatly increase the optimization of the whole process and lead to the development of products that will more meet the requirements of the target group. Food associations that are members of the project consortium will form a so-called “National Innovation Unit”. These will be permanently represented by teams whose task will be to ensure the sustainability of project results over time, i.e. after the project itself. The content of the project and all its tools will be developed in the language of the consortium partners, i.e. in Spanish, English, Turkish, Czech, Danish, French and Flemish. This will increase the impact of the project. More information about the project can



Open New Food - meeting in Belgium (Gent)

be found at www.opennewfood.eu, www.foodnet.cz or www.ctpp.cz.

The consortium consists of these partners: FEDACOVA (Spain), SETBIR (Turkey), SEVT (Greece), FFDI CR (Czech Republic), University of AALBORG (Denmark), AINIA (Spain), University of GHENT (Belgium). The project coordinator is FEDACOVA (the food federation of the Valencia region).







Evropský zemědělský fond pro rozvoj venkova: Evropa investuje do venkovských oblastí



PROJECTS with EU financial support (75% from public resources) & CR (25% from public resources)

The Federation of the Food and Drink Industries filed measure I.3.1 for the 18th round of the Rural Development Programme “Further vocational training and information activities” a total of 5 applications for training and 11 applications for outreach activities.

Václav Suchan, Department of the Administrative and Project Activities, Zdenka Ehlová, Head of the administrative and project activities division

EAFRD/PRV ČR 2007 – 2013

EDUCATIONAL ACTIONS

Concerning information and educational actions this year, the Federation completed a total of four educational projects as part of the 18th round of RDP – Measure I. 3. 1 “Further training and information activities”. Three were focused on the use of additives and excipients in the production of dairy and meat products and soft drinks. The fourth educational project was focused on hygiene in the production of food and beverages.

A project was launched on 20 November 2013 on the use of additives and excipients in the production of beverages. In 2014, six out of the ten educational actions were held as part of this project, at the companies Poděbradka, Rudolf Jelínek and Stock. The project summarizes the view of the use of additives from legislative requirements, limitations, and its own procedures for using additives in the manufacture of beverages to the impact on nutritional value and the requirements of

international standards for its use. The aim of the project was the training of 97 participants in five two-day training events.

A project was completed on the use of additives and excipients in the production of dairy products on 20 May 2014. The project summarizes the view of the use of additives from legislative requirements, limitations, and its own procedures for using additives in the manufacture of milk products to the impact on nutritional value and the requirements of international standards for its use. A total of 101 attendees were trained over the course of ten all-day educational actions held at the companies Madeta, Moravia Lacto, Mlékárna Olešnice, BOHEMILK and Mlékárna Hlinsko.

In 2014, a further eight of the ten all-day educational actions were held as part of a project on the use of additives and excipients in the production of meat products. The project was completed in January 2015 with two

educational actions and a total of 79 attendees were trained in them. The project summarizes the view of the use of additives from legislative requirements, limitations, and its own procedures for using additives in the manufacture of meat products to the impact on nutritional value and the requirements of international standards for its use.

The bulk of the project was carried out in cooperation with MP Krásno in 2014 and focused on hygiene, safety and quality requirements in food production. The general objective of the project is knowledge and skill developments within the production of food and beverages. Teaching is primarily focused on quality systems and food safety according to IFS and BRC, good manufacturing practices, HACCP, and knowledge of the theory of quality food and beverages. The specific objective of the project is to adapt production processes with regard to complying with health and safety conditions for the food industry, thus increasing the competitiveness of

entities operating in the food industry. Approximately 170 participants were trained within this project.

Information actions

Information actions that took place during 2014 were primarily focused on safety, quality and hygiene requirements for food production; an amendment to the Food Act received special place and went into effect on 1 January 2015.

On 21 March 2014, a series of seminars was launched entitled **The amendment to the Food Act and its impact on the competitiveness of the food business.**

The aim of the seminar was to acquaint participants from several food business operators and other interest groups with the latest in European food law and with access to supervisory authorities, because they too are facing demands placed on them in connection with checking the obligations imposed by food business operators.

A follow-up project launched on 13 May was called **Quality and authenticity of food.** Food quality policy is one of the current priorities of the European Union. Legislation only assures consumers that the selection of food will not be deceptive. However, not all aspects are covered – origin of the food, production technology, quality and quantity of the ingredients used, etc. The real problem in the Czech Republic is exactly quality and food adulteration. This project gave participants answers to a series of questions: What are the possibilities of food quality control? When does it concern the production of quality food and when the falsified version?

Another series of seminars were held from 3 September to 30 September called **Application of requirements based on food law and the experience of supervisory authorities** and again devoted to the amendment to the Food Act. The amendment should ensure a uniform process and the particulars for applying the requirements of European food law for all EU Member States and the harmonization of the terminology used in this area. Individual implementing legislation to the Food Act will also react to this matter, and the aim of this project was to alert participants of the seminars to these changes.

In addition to these seminars, another three were held and completed during the course of 2014 entitled:

Adding value to food products through processing organic production, which was meant to significantly increase the knowledge of PPP parties on the practical potential of exploiting and processing organic production. Building private programs of quality while adding value to agricultural and food products with a view to the evolving regulatory requirements of the European Union.

EU quality systems and private quality systems in projects adding value to food products. This follow-up seminar was focused primarily on the use of European quality systems (PGI/PDO/TZS) and their complementarity with building private quality programs, again with regard to the new legislative requirements of the European Union in the framework of the amendment to Act No. 110/1997 Coll., Food Act.

Implications of the amendment to Act No. 110/1997 Coll., from the perspective of the transposition of EU legislation in the context of the future Rural Development Programme. The main goal of the seminar was to familiarize participants with the practical implications of changes to the component parts of the production chain (production and processing, putting on the market) and to report on the major trends of the food market in the Czech Republic and European Union, inter alia, in the context of the impact of the future system of direct payments and public organizations of the market.

The interest shown in these workshops was huge, with training conducted for a total of 1,516 participants, and FFDI will certainly return to these topics several times more in connection with the launch of the new programming period 2014-2020.

Information on these projects were being made gradually available at www.foodnet.cz/Akce/Semináře. Seminars and educational activities are focused primarily on improving the competitiveness of the food industry, the promotion of awareness, on adding value to agricultural products, and on safety and quality in food production. It involves the transmission of information from the legislative area (such as the Food Act) and news related to the objectives of the Common Agricultural Policy in the food sector.

„The Czech Technology Platform for Foodstuffs (CTPF) was established in 2006 and brings together industrial companies, organizations in the sector, primary producers, research institutions, consumer organizations and public authorities for the purpose of creating a common vision, particularly for research in the food sector.“

Miroslav Koberna, vice-chairman of the steering committee of CTPF



CZECH TECHNOLOGY PLATFORM FOR FOODSTUFFS



From the beginning, CTPF has been based on the activities and objectives of the European Technology Platform FOOD FOR LIFE, of which the Federation of Food and Drink Industries is a founding member and a part of today: Promoting a sustainable, successful and competitive Czech agro-food industry, providing increased employment and business opportunities for the Czech Republic and the whole of Europe, ensuring that the healthy choice becomes the easy choice for consumers, providing support for regulation and support for policy development at the national and regional level, contributing to sustainable development in the country and in Europe, extending the ability of the Czech and European agro-food industry to create and exploit market segments that are less sensitive to price competition or to promote the approach “From farm to fork”, adding value to the food chain. In addition, the objectives include ensuring effective and sustained interaction between all stakeholders, presenting a newly defined Strategic Research and Innovation Plan (SRIA) for innovative food production, offering an implementation plan that will include the mobilization of resources to support pan-European research, training, education and the dissemination of cooperation-based knowledge, creating greater confidence among consumers in food and food products, significantly reducing food costs, contributing to improving the health of the population, and to expanding long-term job opportunities within the Czech and European food industries.

To meet these objectives, CTPF adopts an annual work plan, the content of which is the implementation of the

common vision of the Czech Technology Platform for Foodstuffs shared with other stakeholders from the agro-food industry and related sectors, including retail, research institutions, regulatory authorities and consumer organizations. The long-term action plan based on this vision includes public and private activities in the field of research and development, training, education, capacity building, innovation management and the required facilities. CTPF works with extensive communication activities with all stakeholders and non-members of the platform (institutions, companies, etc.) and with consumers with the aim of consolidating information and advice for consumers. CTPF supports research that will increase the confidence of consumers in food, reduce national and regional health spending, and contribute to the production of food that is economically, environmentally and socially sustainable. In this direction, CTPF depends on communication tools, which consist of its website, the magazine Food World, the Project Advisory Centre and the Group for Effective Communication. It is also active in participating in approval, administrative and decision-making processes related to the promotion of business and research provided by government and other institutions.

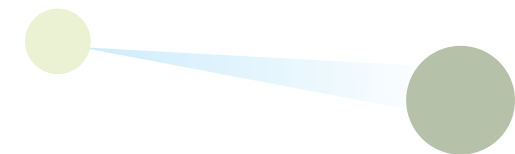
Current status

Where research is concerned, CTPF builds on the priorities established by the European Technology Platform (ETP) “FOOD FOR LIFE”, which has established a general framework for food research up to 2020. The content of each document of CTPF gradually emerges in a number of strategic plans, and it is essential that

it becomes a partner of a number of major institutions and, as an indispensable partner, to have a say, e.g. in the concept of agriculture and food.

Thanks to the national support provided to CTPF by the Ministry of Agriculture since 2008, its publishing and communication outputs have successfully materialized. In addition to a comprehensive range of materials from ETP and CTPF, a number of materials from working groups were published, and CTPF itself is promoted, particularly in the magazine Food World, which provides space for informing the general public about its activities. Also significant was its attendance at seminars and conferences throughout the year, which invariably raises awareness of CTPF among relevant people the same as the information provided on CTPF's own web site does at www.ctpp.cz.

CTPF actively cooperates with the Department of Science and Research at the Ministry of Agriculture on the Concept of Agricultural Research and in the implementation of the departmental research program Comprehensive Sustainable Systems in Agriculture 2012 – 2020 (CSSA) and with the Academy of Agricultural Sciences and shared in formulating the priorities and directions of food research, which were adopted by the ministry and Government Council. These priorities are transmitted through meetings of the CTPF Advisory Group led by the Minister of Agriculture to other ministries with responsibilities in the area of food production and consumption. CTPF also has its own representative in advisory and evaluation committees in the ministry active in science and research.



In 2008, the Scientific Committee established by CTPF, corresponding with the Committee for Science and Research of the Federation, whose activities included the participation of leading food industry experts from research institutes and universities, worked intensively on the wider involvement of CTPF and its experts in European structures, either in ETP or in the 7th FP and newly within the 8th FP HORIZON 2020 program.

The research priorities of CTPF:

Topics for the priority Food and Health:

- Studying the metabolic functions and impacts of food ingredients on human health
- Studying the composition and microbial parameters of food material, particularly bioactive substances, probiotics and probiotics for use in foodstuffs and functional foods and for evaluating the nutritional quality of food.
- Outlining the composition of functional foods and foods with health benefits, including material for nutrition and health claims
- The influence of technological processing on the nutritional properties of food.

Topics for the priority Quality of Food:

- Development of methods for assessing the quality of raw materials and finished products.
- Development of methods for detecting adulterated food.
- Support for improving the safety and nutritional value of traditional foods

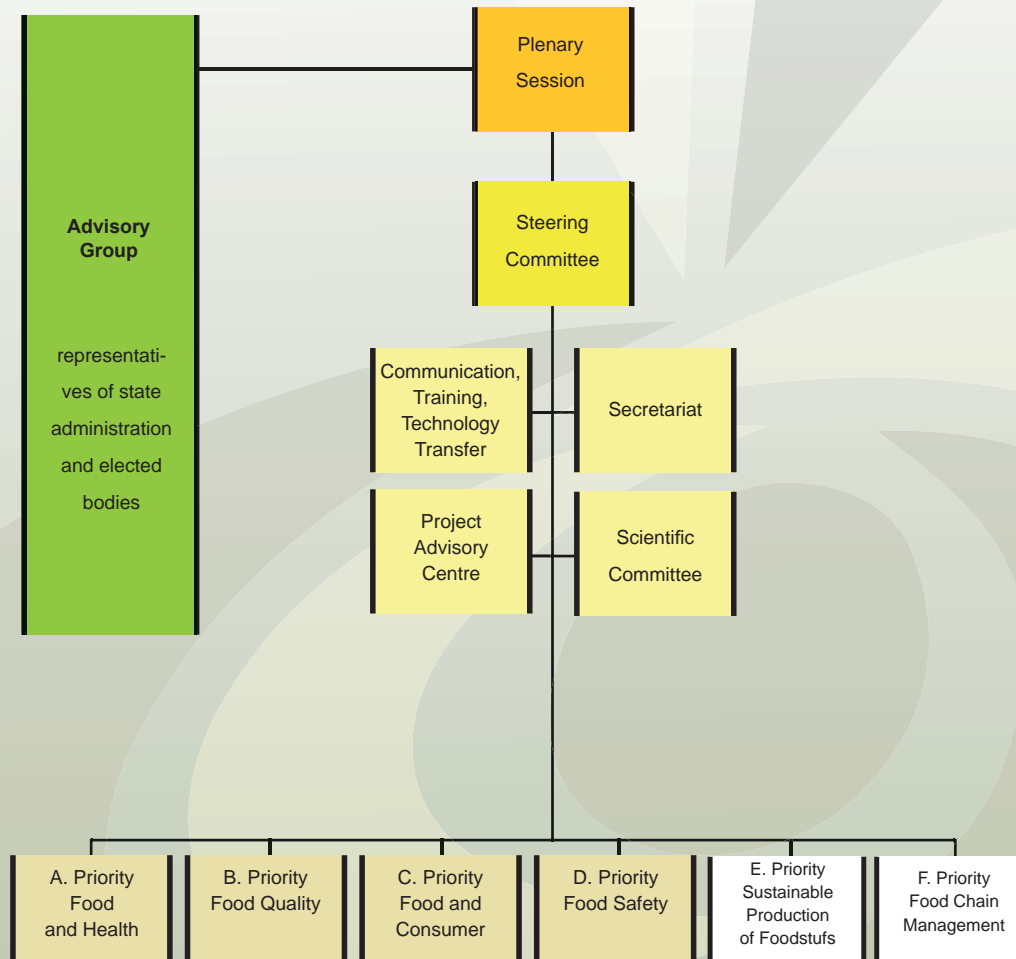
Topics for the priority Food and Consumer:

- Support for improving communication (especially critical).
- Studying the consumer decision-making process in relation to food.
- Consumer expectations in relation to quality, safety and the nutritional properties of food

Topics for the priority Food Safety:

- Development of simple detection and control methods for industrial use.
- Development of procedures to minimize the content of toxic substances in food (including natural toxins).
- Procedures to minimize the microbial contamination of food.
- Modelling and predicting the dynamic behaviour of food and microorganisms, or other simple tools for risk assessment.
- Improving procedures for searching and traceability in the food chain.
- Development of active and intelligent components to enhance quality, safety and to provide consumer information.

Organizational Structure



Board of Directors (as of 31/12/2014)

BERÁNEK Ondřej
COUFAL Stanislav
DŘÍZAL Jaromír
FALTÝNEK Jaroslav
GOJIŠ Oldřich
HRABCOVÁ Magdalena
JEŽKOVÁ Jana
KUBISKA Zdeněk

KURČÍK Jaroslav
LEŠTINA Miroslav
MATES František
MOTEJZÍK Čestmír
MRÁZEK Michal

BOHEMIA SEKT, s. r. o.
Moravia Lacto, a.s.
Podnikatelský svaz pekařů a cukrářů ČR
AGROFERT, a. s.
INTERLACTO, spol. s. r. o.
Mars Czech, s. r. o.
Karlovarské minerální vody, a. s.
Czech-Moravian Confederation of
Organisations of Agricultural Supply and
Purchase
PENAM, a. s.
Czech Bottled Watercooler Association
Association of Poultry-Producing Enterprises
MASO UZENINY PÍSEK, a. s.
VITANA, a. s.

PAVLÍK Petr
PILČÍK Karel
POJER Josef
PRAŽAN Jiří
REINBERGR Oldřich
STRNAD Hynek

ŠTĚPÁNEK Zdeněk
TEPLÝ Milan
TOMAN Miroslav

TOMÁŠ Pavel
TOMÁŠEK Jiří
VAJČNER Pavel
VÁVROVÁ Marie
VYBÍRAL Pavel

STOCK Plzeň – Božkov, s. r. o.
Czech Meat Processors Association
Czech-Moravian Sugar Association
Non-alcoholic Drink Producers Union
Tereos TTD, a. s.
Association of Legal Entities of Canning Industry
and Distilling Industry
BONECO, a. s.
MADETA, a. s.
Federation of the Food and Drink Industries of the
Czech Republic
PT servis konzervárna, spol. s. r. o.
Association of Delicatessen Producers
ZNOVÍN ZNOJMO, a. s.
Czech Starch Association
POLABSKÉ MLÉKÁRNY, a. s.

Executive Board (as of 31/12/2014)

COUFAL Stanislav	Vice-president
KURČÍK Jaroslav	Vice-president
MOTEJZÍK Čestmír	Vice-president
PAVLÍK Petr	Vice-president
REINBERGR Oldřich	Vice-president
STRNAD Hynek	Vice-president
TOMAN Miroslav	President

Supervisory Board (as of 31/12/2014)

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

Committees (as of 31/12/2014)

Legislation Committee

Chairman: Jana Bártová

Committee for the Environment

Chairman: Jana Ježková

Working groups (as of 31/12/2014)

Working Group on Trade Policy and Marketing

Chairman: Jan Teplý

Working Group for Healthy Lifestyle

Chairman: Martin Klofanda

Sections (as of 31/12/2014)

Section for Organic Food

Chairman: -

Section of Technology Suppliers

Chairman: Jan Jedlička

Section for Milk

Chairman: Michal Němec

Section for Delicatessen

Chairman: Zdeněk Štěpánek, Jiří Mališka, Jiří Tomášek

Section of Raw Materials and Intermediate Products for Bakery and Confectionery

Chairman: Miroslav Lipavský

Section of Frozen Food Products and Ice-cream

Chairman: Antonín Rubáš

FFDI members

FFDI Members / Companies (as of 31/12/2014)

AG FOODS Group a.s.	Devro s.r.o.	MASO UZENINY PÍSEK, a.s.	PROQIN s.r.o.
AGROFERT, a.s.	Drůbežářský závod Klatovy a.s.	Mars Czech s.r.o.	Předměřická a.s.
ALIKA a.s.	EURO FRIGO Praha, spol. s.r.o.	MD logistika, a.s.	PT servis konzervárna spol. s.r.o.
ALIMPEK spol. s.r.o.	EUROICE s.r.o.	MDC Company XXI, s.r.o.	RAVY CZ, a. s.
ALIMPEX - Louny spol. s.r.o.	EUROSERUM s.r.o.	MILCOM a.s.	RUDOLF JELÍNEK a.s.
AROCO, spol. s r.o.	EXTRUDO Bečice s.r.o.	Mlékárna Hlinsko, a.s.	Salinen Praha, s. r. o.
ARTIFEX INSTANT, s.r.o.	F&N dodavatelé, s.r.o.	Mlékárna Olešnice, RMD	Slovácká Fruta, a.s.
backaldrin s.r.o.	FRUTA Podivín, a.s.	Mlékárna Klatovy, a.s .	STOCK Plzeň-Božkov, s.r.o.
BEAS, a.s.	FUNGI CZ, a.s.	MOCCA, spol. s. r. o.	SPAK Foods, s. r. o.
Bidvest Czech Republic s.r.o.	GOLDIM spol. s.r.o.	Mondelez Czech Republic, s. r. o.	Školní rybářství, Protivín
BIOFERM - lihovar Kolín, a.s.	GURMÁN KLUB, s. r. o.	Moravia Lacto a.s.	Tata Global Beverages Czech Republic a.s.
Blanická bramborářská s.r.o.	Hamé s.r.o.	MRAZÍRNY PLZEŇ - DÝŠINA a.s.	Tereos TTD, a.s.
Blatenská ryba, spol. s.r.o.	Heineken Česká republika, a.s.	NEKTAR NATURA, s. r. o.	TPK, spol. s.r.o.
BOHEMIA SEKT, s.r.o.	HOPI s.r.o.	Nestlé Česko s.r.o.	UNILEVER ČR, spol. s.r.o.
Bohušovická mlékárna, a.s.	Hügli Food s.r.o.	OLMA, a.s.	UNITED BAKERIES a.s.
BONECO a.s.	INTERLACTO, spol. s.r.o.	OTMA - Sloko, s.r.o.	VALDEMAR GREŠÍK - NATURA s.r.o.
Budějovický Budvar, národní podnik	Jan Becher - Karlovarská Becherovka, a.s.	PENAM, a.s.	VITANA, a.s.
CARLA spol. s.r.o.	JH GROUP, spol. s.r.o.	PIKA, a.s.	VÍNO BLATEL, a.s.
CATUS spol. s.r.o.	Karlovarské minerální vody, a.s.	Pivovar Protivín, a.s.	Vodňanská drůbež, a.s.
Coca-Cola Česká Republika s.r.o.	Kofola a.s.	Pivovar Samson a.s.	XAVEROV, a.s.
CORAX Trading s.r.o.	Kostelecké uzeniny a.s.	Plzeňský Prazdroj, a.s.	Zámecká výrobní uzenin spol. s. r. o.
Crocodile ČR, spol. s.r.o.	Krajské školní hospodářství České Budějovice	POEX Velké Meziříčí, a.s.	ZNOVÍN ZNOJMO, a.s.
ČEROZFRUCHT s.r.o.	LACRUM Velké Meziříčí, s. r. o.	POLABSKÉ MLÉKÁRNY a.s.	ZŘUD - Masokombinát Polička, a.s.
ČESKÉ HOUBY a.s.	LYCKEBY CULINAR a.s.	PRO-BIO, obchodní společnost s.r.o.	
Danone a.s.	MADETA a.s.	PROFROST a.s.	
DELIMAX, a.s.		Procházka, a. s.	

FFDI Members / Associations (as of 31/12/2014)

Association of Delicatessen Producers
Czech Bottled Watercooler Association
Czech-Moravian Poultry Union
Czech-Moravian Confederation of Organisations of
Agricultural Supply and Purchase
Czech-Moravian Sugar Association
Czech-Moravian Dairy Association
Czech Beer and Malt Association

Czech Meat Processors Association
Czech Starch Association
Association of Bakers and Confectioners of the Czech
Republic
Czech Fish Farmers Association
Association of Poultry-Producing Enterprises
Union of Millers and Bakers of the Czech Republic
Mineral Water Association

Union of Distilleries of the Czech Republic
Mineral Water Association
Czech Grape and Wine Producers Association
Non-alcoholic Drink Producers Union
Distilleries Union of the Czech Republic
Czech Union of Spirits Producers
Association of Legal Entities of Canning Industry and
Distilling Industry

FFDI Associated Members (as of 31/12/2014)

ABB s.r.o.
AGRAL s.r.o.
AGROTRADE, a.s.
ALS Czech Republic, s.r.o.
ALLIVICTUS, s.r.o.
ARGO BOHEMIA, s.r.o.
BARENTZ spol. s.r.o.
Bohemia Certification s.r.o.
BOHEMIACHLAD spol. s.r.o.
CERT-ACO, s.r.o.
COINTRA s.r.o.
Czech Association of Special Foods
De Heus, a. s.
EKO-KOM, a.s.
EKO-LAB Žamberk, spol. s.r.o.
EKOCENTRUM OVALAB, s.r.o.
EUROFINS CZ, s.r.o.

EUROPROJECT SERVICE a.s.
Ferrero Česká s.r.o.
FOODSERVIS s.r.o.
Global Bake Solutions, s.r.o.
HÁJEK ZRZAVECKÝ advokátní kancelář, s.r.o.
CH – MONT, s. r. o.
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Ing. Jindra Jirešová
LAKTEA, o.p.s.
Leona Petrová
Mendel University in Brno
METAROM, a.s.
MVDr. Pavel Mikuláš - Laboratoř pro vyšetřování potravin
MVDr. Šotola s.r.o.
PACOVSKÉ STROJÍRNY, a.s.
Pavel Provazník

Philip Morris ČR a.s.
NutriAcademy, s.r.o.
SIDAT, spol. s r.o.
Secondary School of Foodstuff Technology Pardubice
Secondary School of Agriculture and Food Industry Klatovy
TPA Horwath Corporate Finance s.r.o.
TÜV SÜD Czech s.r.o.
UNITED BUSINESS a.s.
Veletrhy Brno, a.s.
VESTA AUTO s.r.o.
Institute of Chemical Technology Prague – Faculty of
Food and Biochemical technology
Research Institute of Brewing and Malting, PLC
Food Research Institute Prague

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Common Agricultural Policy EU

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Department

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of the Administrative and Project Activities

Martina Hlavatá
President's Assistant/Secretary, Department
of the Administrative and Project Activities

Iva Caklová
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Department of the Administrative and Project
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