Market study on the intensive animal production chain (pigs & poultry) in the Czech Republic

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Part 1: The Pig Production Chain

1) The primary production sector – present situation and future developments

1.1.) Core information

Agriculture in the Czech Republic has gone through a period of fundamental restitution, privatisation and transformation since 1990. The objective and result of the process has been the revival of private ownership and introduction of market principles. During the recent years prior to the accession of the Czech Republic (CR) into the EU the main task of the entire sector was to introduce harmonised legislation and a system of agriculture working within the common agricultural policy (CAP) of the EU.

A specific structure of the primary farm production has resulted from such a process.
A considerable part of the primary farm production is now in the form of large-scale production by farm businesses – legal entities. They are mainly cooperatives, joint stock companies and companies with limited liability. Family farms have been predominantly the restituted and revived farms of original owners of the pre-collectivisation times in the 1950s.

Farm business structure in CR in 2004

Legal form	Number of firms	Agricultural land farmed area		Arable land farmed		Average area	
		ha	%	ha	%	ha	%
Physical entities total (private farms)	51420	1019814	27,5	677090	24,5	20,7	13,2
Legal entities total	3219	2684382	72,5	2090322	75,5	925,3	649,4
Of that trading companies total:	2361	1660531	44,8	1273611	46,0	796,0	539,4
of that Ltd. Co.	1662	810852	21,9	572242	20,7	559,6	344,3
of that joint stock	657	835078	22,5	692042	25,0	1394,1	1053,3
of that cooperatives	678	938470	25,3	768812	27,8	1424,1	1133,9
of that others	180	85381	2,3	47898	1,7	547,3	266,1
Total:	54639	3704196	100,0	2767412	100,0	71,0	50,6

Source: CR Agriculture 2004 General Report

At that time, the farm sector was subject to a number of unfavourable effects. During the period of socialism there were no modern technologies, there was a shortage of feed components, and animal breeding was on low level thereby resulting in less productivity. Further problems appeared in the first half of 1990s having to do with the transition to the market economy. Privatisation, price liberalisation, high inflation, overemployment in the sector, and non-availability of capital credit were among the problems. Total farm production slumped by 30% in average. The Czech farm ministry established in the late 1990s a Support and Guaranteee Fund which guaranteed the loans provided by banks and subsidised a part of the loan interest. Investments into the pig sector could be observed only since mid 1990s.
In the 1990s, the entire market with farm commodities, including pigmeat, was destabilised, and the farmers prices of pigs fluctuated during those years by as much as 100%.

1.2.) Pig numbers

The data in the pig numbers table indicate that total pig numbers have decreased since 1990 by almost 30%. Nevertheless, the pig sector has been considered a very typical sector of the primary farm production, and with respect to economic attractivity the primary farm production can rapidly increase its current production of pigs.

Pig numbers
(000 head)

	1989	**1998**	**1999**	**2000**
Pigs total	4685	4013	4001	3688
• of that sows	312	320	317	297

Source: Situation and Outlook Report, Ministry of Agriculture (MoA CR), december 2005

Pig numbers development in CR – as at end of quarter (Q)
(000 head)

Quarter	**Pigs total**					**of that sows**				
	2001	**2002**	**2003**	**2004**	**2005**	**2001**	**2002**	**2003**	**2004**	**2005**
QI.	3314	3457	3362	3126	2876	277	297	282	250	232
QII.	3286	3628	3440	x	x	281	305	x	x	x
QIII.	3475	3663	x	3053	2890	285	298	279	246	254
QIV.	3347	3428	3308	2914	x	282	295	265	237	x

Source: Situation and Outlook Report, MoA CR, december 2005

Reasons of the decreasing in pig numbers were:

- lower productivity of labour and lower animal yields at the beginning of the period of transformation in 1990
- substantial fluctuation of farmers prices often due to bumper imports of subsidised produce from EU still prior to the CR accession to EU
- lacking willingness of the primary producers to associate in marketing organisations
- privatisation and modernisation of meat plants and within the food sector as a whole, and very long payment periods for purchased animals, namely in the 1990s
- unsatisfactory capability of meat producers and processors as well as traders to export on foreign markets
- change of eating habits in favour of poultry meat.

The post-accession period can be characterised as a step by step revival of the fall of the pig numbers, and on the other hand the increasing imports of pigmeat to the level around 15% of the domestic consumption. This development proved the lower rate of competitiveness of the pig and pigmeat sectors including the processing sector on the internal market.

1.3.) Pig breeders

The pig breeders are mainly legal entities having emerged from the transformation and privatisation processes. Physical entities, i.e. the traditional family farms, keep a mere 10% of the total pig numbers a they are mixed farms.

Structure of pig numbers by legal forms of businesses

Form of legal entity	Year 2002	
	number	%
Physical entities total	365910	10,6
Legal entities total	3061948	89,4
• of that trading companies total	2166348	63,2
• of that limited liability companies	614272	17,9
• of that joint stock companies	1545564	45,1
• of that cooperatives	863672	25,2
• of that others	31928	0,9
Total	3425858	100

Source: CR Agriculture 2002 General Report

The potential of the entire sector can be well estimated by the structure of the herds kept and by the housing capacities. The table indicates that businesses owned by legal entities have 8 to 10 – times larger housing capacities both for the sows and for fattening.

Pig housing capacities in CR

Subject			CR	Physical entities	Legal entities
Housing for sows	Total	House number	5659	2501	3114
		head capacity	456148	59210	393282
		house average	81	24	126
	of that built or renovated after Jan 1, 1990	House number	1014	530	473
		head capacity	91423	14519	76037
		house average	90	27	161
Housing for fattening	Total	House number	10969	7083	3596
		head capacity	2359522	315385	2014640
		house average	215	45	560
	of that built or reconstructed after Jan 1, 1990	House number	2135	1206	884
		head capacity	719110	95488	614337
		house average	337	79	695

Source: Agrocensus 2000

Among the largest herds in CR specialised in pig fattening are those with housing capacity at 15 000 to 20 000 head. The average size is 3000 – 10 000 head. The number of such large pig producers in CR is not available but it is estimated at some 500 firms.
The largest sow breeder in CR is the farm co. Plevnice by Pelhrimov with 2000 sow housing capacity.Among the largest pig fattening companies are Agpi Pisek a.s. and Vysoka at Dobrany close to Plzen.

Some 50% of pig breeders´production and 50% of pigmeat and products are traded through marketing organisations, which are cooperatives of producers. There has been a considerable unwillingness of the breeders through 1990s to associate in marketing organisations with the aim of achieving better market conditions through joint approach. Such unwillingness stemmed from the compulsory unification during the socialist period, and also from the feeling that the businesses were large enough to be able to market their own production on their one. Since the late 1990s the farm ministry has been providing a subsidy for the

establishment of a marketing organisation, and the farmers´ unions initiated the establishment of separate or umbrella marketing organisations with respect of avoiding the market problems and facilitating farmers´ education. The most important marketing organisation for pig farmers has been Centroodbyt, the national marketing cooperative. Centroodbyt is cooperative of 10 regional cooperatives specializing in pig production and there are 23 associated members who are farming companies.
A marketing organisation offers several general advantages to farmers – members. Farmers are obliged to sell all pigs through the cooperative and it is a way to be a relevant partner for the processing industry in terms of supplied volume. Cooperatives guarantee the purchase of all pigs from farmers – members at the best possible price.
Centroodbyt sells about 30 % of pigs of the Czech annual production. It is quite a low number regarding the fact that it is the national umbrella organisation.

1.4.) Genetics and breeding

The Association of Pig Breeders in Bohemia and Moravia has been an important actor in pig breeeding, setting breeding tasks for its members, formulating the breeding policy and keeping the Pedigree Records. The Association keeps productivity records which are collected by the authorised organisations, and also disseminated amongst the Association members.
The typical pig breeds are Czech White Thoroughbred and Czech Landrace. The number of piglets reared per sow per year reached 19 head in 2004 which is considered a weakness of the branch and compared with the best pig breeding countries in Europe it is 4 head less. The Association´s aim concerning the prospective sow fertility is considered to be 23 piglets reared per sow per year. In the pigmeat S – P classes there is 55.7% lean meat at the average live slaughter weight of 113 kg.

The pig breed-improvement takes place in registered improvement herds and nuclear herds. Selected sows are included in super-fertile lines with the aim of further improvement of the reproduction parameters.
Recently, the exports of pigs for breeding purposes to countries east of CR has been increasing. That proves the fact that Czech breed-improvement quality and breeding work have reached the levels above the average of the former socialist countries and Czech pig breeders are coming close to the results of the advanced pig breeding countries.

Summary of reproduction results in 2004

Breed	Herd category	Number of litters	Live born piglets per sow per year
Czech White	Improvement herds	7955	23,7
	Nuclear herds	3611	24,7
	Superfertile lines	741	29,7
Czech Landrace	Improvement herds	2631	24,0
	Nuclear herds	1104	24,6
	Superfertile lines	223	27,9

Source: Náš chov 5/2005 („Our Herd“ Monthly)

In 2002, the mark of 25 piglets born alive per sow was reached in 7 improvement herds in the Czech White Thoroughbred, and in 5 herds in Czech Landrace. In 2004 the figure was 17 and 8 respectively. It is not possible to clearly characterise the Czech pig population as either Czech White or Czech Landrace. Pure breeds are kept in improvement herds for production of

breeding animals and very often it concerns cross breeding between Czech White and Landrace breed. The starting position is usually 50 %. These animals are bought by farmers and they decide which breed will produce their pigs for fattening.

1.5.) Breeding Economics

Pig breeding economics are affected by the prices for which the farmers sell, and by the costs at which they can put out a unit of production. Significant fluctuation of the farmers prices affected the pig farmers´ economics. Such price fluctuations, for the elimination of which the Czech market is too small, always resulted in massive sales of the pigs and a further pressure upon the price, or vice versa, the fertilisation of sows with higher prices in sight. The pig breeders´ situation was further complicated by the necessity to repay the loans for the housing modernisation, together with the imports from EU prior to CR accession.
Such uncertain environment discouraged many businessmen from investing in the sector and it also affected the overall pig production. After the CR accession into EU the prices of pigs stabilised to some extent, but after the customs barriers were lifted the economic position of Czech pig breeders appeared to be less competitive and some breeders gave up under such pressure. Pig production is a non-regulated activity (no CMO) within the Common Agriculture Policy (CAP) and Czech farmers currently tend to produce such commodities which have CAP-guaranteed prices or are under direct subsidies.

Average farmers prices of pigs, class I, l.w. in CZK/kg

Commodity	1998	1999	2000	2001	2002	2003	2004	2005
Slaughter pigs	34,06	30,48	35,26	44,06	32,89	30,47	33,01	32,47∗
Calculated in EURO∗∗	1,14	1,02	1,19	1,47	1,1	1,02	1,1	1,08
Prices in EU (in CZK)						32,12	35,12	
EU prices (in EURO)						1,07	1,17	

Source: Situation and Outlook Report, MoA CR
Note: ∗ The 2005 average has been calculated for January through October
Note: ∗∗ The orientation exchange rate does not reflect the accurate average rate for the calendar year but for the purpose of comparison the rate has been set at 1 EURO = 30 CZK.

Farmers prices of slaughter pigs, live weight, class I.

Yr	I.	II.	III.	IV.	V.	VI.	VII.	VIII.	IX.	X.	XI.	XII.	Avge
2004	25,48	24,41	27,00	30,03	30,33	31,14	35,13	36,17	36,18	37,09	35,38	34,72	**33,01**
2005	34,33	32,27	31,78	31,40	29,98	31,03	33,07	33,39	33,19	32,57			**32,47**

Source: Situation and Outlook Report, MoA CR

Farmers prices of slaughter pigs, in pigmeat class I

Yr	I.	II.	III.	IV.	V.	VI.	VII.	VIII.	IX.	X.	XI.	XII.	Avge
2004	31,17	29,70	34,20	37,52	37,38	39,63	45,86	46,02	46,20	47,88	44,96	44,64	**41,95**
2005	43,32	40,57	40,85	40,26	37,90	40,44	43,15	43,10	42,95	41,91			**41,74**

Source: Situation and Outlook Report, MoA CR

Weaner price, live weight, CZK/kg

Yr	I.	II.	III.	IV.	V.	VI.	VII.	VIII.	IX.	X.	XI.	XII.	Avge
2004	46,66	44,53	46,36	50,56	53,61	52,75	58,33	60,21	60,61	61,29	60,03	59,50	**56,09**
2005	59,01	58,19	58,40	58,58	58,49	58,36	61,02	61,46	60,60	59,78			**59,71**

Source: Situation and Outlook Report, MoA CR

Pig production and productivity

	1989	1998	1999	2000	2001	2002	2003	2004
Pigmeat production (000 t)	778,0	669,9	638,8	583,9	584,0	585,4	579,90	547,00
Average weight gains, fattening pigs, kg/head/day	0,63	0,64	0,65	0,65	0,65	0,67	0,651	0,688

Source: Situation and Outlook Report, MoA CR

As for the real costs per unit of production we can start from the studies which are carried out by the Institute of Agricultural Economics. (VUZE). In 2004 the production costs were 32.01 CZK/kg live weight. The table below shows the structure of total costs.

Fattening pigs costs development and structure in businesses owned by legal entities

	Reserach year					Index		Costs structure				
	1999	2000	2001	2002	2003	2003/ 1999	2003/ 2002	1999	2000	2001	2002	2003
	CZK / 100 feeding days (FD)					%		%				
Direct material costs	1069	1065	1228	1213	1113	104,2	91,8	71,0	67,8	68,5	71,7	72,8
of that feeds, (bedding) purchased	658	702	777	843	716	108,8	84,9	43,7	44,7	43,4	49,9	46,8
Feeds (bedding) on-farm	363	293	395	281	327	90,2	116,4	24,1	18,7	22	16,6	21,4
Other direct costs & services	63	83	88	97	74	116,7	76,1	4,2	5,3	4,9	5,7	4,8
Labour costs total	165	182	214	166	160	97,5	96,6	10,9	11,6	12	9,8	10,5
Investments depreciation	44	48	46	45	44	100,5	97,6	2,9	3,1	2,6	2,7	2,9
Subsidiary activities	31	47	48	44	36	117,4	81,8	2,0	3,0	2,7	2,6	2,4
Overhead costs	135	147	168	127	79	58,4	62,2	9	9,3	9,4	7,5	5,2
Costs total	1506	1571	1792	1691	1529	101,5	90,4	100	100	100	100	98,5
Productivity (kg/100 FD)	63,9	65,4	65,4	67,2	65,1	102	97	x	x	x	x	x
Costs per weight gain (CZK/kg)	23,2	23,8	27,1	24,9	23,2	99,8	93	x	x	x	x	x
Costs per live weight (CZK/kg)	29,7	30,1	35,2	36,3	32	107,7	88,1	x	x	x	x	x

Source: Investigation into company costs efficiency, VUZE, Praha

It is interesting to note that businesses owned by physical entities are more cost-efficient in spite of having smaller production capacities. An explanation, however, may be in the inaccurate appreciation of the farmer´s own and his family members´ work, but also in the higher work motivation and productivity.

Costs per 1 kg l.w. in fattening pigs compared between legal and physical entities in 2004

	Legal entities		Family farms	
	CZK/kg	**%**	**CZK /kg**	**%**
Live weight costs	32,01	100	30,76	100
of that:				
Feed (bedding) purchased	15,17	47,4	12,19	39,6
Feed (bedding) on-farm	6,93	21,4	9	29,3
Labour costs total	3,39	10,6	4,18	13,6
Overheads	2,16	6,8	1,99	6,5

Source: Company costs efficiency study, VUZE

There are indications that the best farmers and the worst differ about 30 % in production costs. There are indications the best farmers are able to reach production costs level of 25 CZK per 1 kg of live weight.

1.6.) Future developments

Prior to the entry into the EU and in the subsequent year the situation has cleared up to show which of the pig breeders really wanted to stay in the business. The price fluctuations in the past resulted in the introduction of non-recurring herds under temporary conditions as a response to periods of good prices for pigs. Currently, the large EU market guarantees more stabilised price levels, and only those pig breeders who can and want to run such a demanding business stay in the sector. Such herds offer a prospective development. Pig production in CR has more potential for moderate growth than showed in 2005. Increasing reproductive qualities within the existing pig herds can be expected together with the continuing modernisation of the housing technologies and with considerable lower Czech labour costs. Czech labour costs in agriculture are about half the level of EU 15: the average montly agricultural wage in 2005 was following the Czech Statistical Office 13 878 CZK (while the average monthly wage for all sectors was 19 030 CZK).

1.7) Animal Health Status

The Czech Republic is a country officially free of Aujezski disease. The EU Commision approved that status in 2005. The Czech Republic for that reason requires guarantees of Aujezski free status for all imports into the country. The Czech Republic is also officially free of Classical Swine Fever.

2) The slaughter/processing sector: present situation and future developments

2.1.) Core information

Most of the meat processing capacities and meat factories were built in the 1970s and 1980s. Such meat processing plants were in fact meat combines putting together slaughter houses and meat processing plants, and even canned meat production units. Their allocation and capacities were planned by the socialist state so as to cover the country´s territory evenly with respect to animal purchase and meat processing. Among the most important meat plants of that time were the meat combines Martinov, Hroznetin, Valasske Mezirici, Zlin (formerly Gottwaldov), Plana on Luznice, Mlada Boleslav, Kladno, Policka, Klatovy, Olomouc, Hodonin, Sudena, Chomutov, Pribram, Praha – Pisnice and Praha - Cakovice. These factories were built with relatively high levels of technology, hygiene and economy. The number of slaughtered pigs in average ranged between 300 and 1 300 pigs per work shift (8 hours) using one slaughter line with the productivity of 50 pigs per worker. The largest slaughter house used to be in Prague with the capacity of 4 500 pigs per shift on two slaughter lines.
Cattle slaughtering capacities were between 20 and 250 per shift with the productivity of 20 carcasses per worker. The technologies and equipment used were mostly of „western“ origin. Some of these meat plants formed a backbone of the Czech meat sector and they still exist, others have been discontinued.

By 1995 all property of physical and legal entities had been privatised. New abbatoirs were either restructured or built anew, including processing plants, such as Vahala, Schneider, Bilbo, Prave, Steinhauser, Slama, Felger and Sojka. The firm LE-CO was started in a garage of a family house, and nowadays the firm at Jircany by Prague runs a modern quality ham production plant. 400 small slaughter capacities and meat processing workshops were established in the second half of 1990s which were built by farming companies with the help of the State. The result : redundant meat processing capacities.
While the food retail chains were pressing for the lowest possible prices, the farmers on the other end of the production spiral demanded higher prices for their slaughter animals. That resulted in the close-down of abbatoirs and processing factories. In and around Prague , for instance, the meat combines Praha-Pisnice, Praha-Cakovice, Kladno, Mlada Boleslav and Uvaly were closed down. Important meat plants were closed down throughout the Czech Republic, such as in Brno, Hodonin, Zlin, Valasske Mezirici, Kromeriz, Frydek-Mistek, Olomouc and Sumperk. By the time of the country´s entry into the EU in 2004 a total of some 300 small meat factories were closed down as they were unable to meet the demanding EU legislation. Nevertheles, there is still overcapacity of 10 % - 20 % in Czech Republic to slaughter livestock and process meat. As there are no precise figures available, the estimates concerning overcapacity deviate from 10 to 40% in red meat processing.

2.2.) Processing of pigs

Between 2003 and 2004 the volume of slaughtered pigs dropped by 15% and the pig slaughter weight fell to 107 kg. Total demand for raw material for the meat combines´ own meat processing also had a falling trend, with pigmeat by 21%. Use of pigmeat for further processing into meat products dropped by 8.8 %. Total pigmeat production in CR slumped by 17% and it was the first time ever that the country ceased to be self-sufficient in pork.
It happened because pig prices were very low at a level 27 CZK (0,9 EURO) on the beginning of 2003. Even more severe drop in prices occurred a year later (Feruary 2004)

when farmers received in average 24 CZK (0,8 EURO) per 1 kg of live weight. These two "shock" periods were decisive for some farmers to leave the industry. When CR entered the EU in May 2004, significant import of pork meat from the EU started.

Share of jointed meat, meat products and canned meat of total meat products in meat combines in CR

Year	Share in tonnes				Share in %			
	Meat products total	of that: meat joints	Meat products	Canned meat	Meat products total	of that: meat joints	Meat products	Canned meat
1999	358560	153103	190547	14910	100	42,7	53,1	4,2
2000	321513	129704	180192	11617	100	40,3	56,0	3,6
2001	308090	125925	172835	9330	100	40,9	56,1	3,0
2002	341552	149737	182241	9574	100	43,8	53,3	2,8
2003	353774	159581	185284	8909	100	45,1	52,4	2,5
2004	353389	159938	185637	7814	100	45,2	52,5	2,2
2005	333953	154980	173199	5790	100	46,3	51,9	1,8

Source: Situation and Outlook Report, MoA CR

2.3.) Ownership structure of the main processing capacities

Agrofert Holding a.s.
The largest company operating in Czech agriculture as a supplier of inputs and at the same time as purchaser of farm products. To this group belong Kostelecke Uzeniny, the largest meat combine in the country, and also the meat combines Masna Studena and Maso Planá nad Luznici ((125000 pigs per year).
Kostelecke Uzeniny by Jihlava currently slaughters 200 000 pigs and 15000 cows and bulls annually, the largest volume of pigs in CR.

The ZŘUD Group
The joint stock company owns the meat combines Masokombinát Pisek, Masokombinát Policka (72000 pigs per year and 180000 bulls and cows per year) and Masokombinát Cheb. It also owns fattening farms, a breed improvement station and a rendering plant in Podborany.

Another group is an investment group registered in Slovakia, J&T Finance Group (see www.jtfg.com or www.jtam.cz) which has majority shares in the meat combines Krahulci, Hodice and Kromeriz.

Other important pig slaughtering facilities are : Kostelec na Hane, Jicin, Zemko, Skalice u Nachoda, Meat Combine Martinov, Prochazka Roudnice nad Labem (120000 pigs annually and 6000 bulls and cows), Jatky Pribram, Bucovice u Brna and Sumavsky Masokombinat Klatovy (which includes also the major poultry company Xaverov).
For the complete list of slaughter houses see Chapter 11.

2.4.) Outlook

After 1990 there were 400 slaughter facilities in CR of varying capacity. Nowadays there are 300 of varying capacity and this number is expected to fall further. Within the next 5 – 10

years specialised slaughtering and butchering plants will be established with much bigger production capacity than the current factories. 10 large slaughter and butchering plants are expected to remain together with 30 – 50 meat and delicatessen processors.
The ownership structure has been fairly fragmented in spite of several groups expanding . Strong investors have been absent in the sector for a long time thereby leaving many meat plants deep in debt. In the early 1990s the reason was in the privatisation costs and due to the first stage of modernisation of the technologies while, prior to the accession to EU, the firms had to invest heavily to meet the EU veterinary and hygiene standards. Further mergers and foreign investors´ involvement can be expected.

3) Consumption: present situation and future developments

3.1) Present situation

Per capita pork consumption in CR has been around 41 kg /year which is about 50% of the total meat consumption at 80 kg per head of population per year. Such consumption of pork is considered as relatively stabilised regardless of the fall by 10 kg/head since 1990, mainly as a result of the changed eating habits particularly in favour of poultry meats.

CR meat consumption kg/yr

	1975	1985	1990	1995	2000	2001	2002	2003	2004
∗Meat total:	81,1	89,3	96,5	82,0	79,4	77,8	79,8	80,6	79,7
of that:									
Pork	40,0	43,9	50,0	46,2	40,9	40,9	40,9	41,5	41,4
Beef	26,1	29,5	28,0	18,5	12,3	10,2	11,2	11,5	10,3
Veal	1,2	0,8	0,4	0,3	0,2	0,2	0,1	0,1	0,1
Lamb, goat					0,3	0,3	0,3	0,3	0,3
Poultry	10,0	10,6	13,6	13,0	22,3	22,9	23,9	23,8	24,3
Fish	5,8	5,6	5,4	4,9	5,4	5,4	5,3	5,3	5,4

Source: Situation and Outlook Report, MoA CR
Note: ∗ the table does not show consumption of game and rabbits but such consumption is calculated in the meat consumption total.

The total meat consumption corresponds to the average meat consumption in EU and no substantial changes in the consumption volume and structure can be expected in the nearest future. The consumers are fairly conservative and not even BSE affected their consumption. The change of the eating habits in favour of poultry meats stems from the taste of the Czech consumers who want to eat healthy food of better quality than under socialism, and they tend to follow the trends in the consumption of the advanced „western“ countries.
The domestic consumer step by step becomes familiar with the possibility of purchasing meat joints of various quality or even meat from organic herds, but the price has always been the fundamental shopping criterion. Retail chains and their sales have become very popular because it was a completely new way of shopping after 1990. The chains have become very powerful on the market and 75% of the retail sales are made through them.

3.2.) Future developments

The current pork meat consumption of more than 40 kg per year per capita in CR can be considered as stabilised in the long run. Roast pork, dumplings and cabbage is the very popular national dish.
During past years is has become more common to sell meat in one dish pack containing different numbers of meat pieces. During the last four years there is increasing demand for marinated or spiced meat.

4) Foreign trade: present situation and future developments

4.1.) Core information

The entire sector of pig farming and pigmeat production prior to the CR entry into the EU had been affected by customs tariffs applied by both the CR and EU. Since the CR entry into the EU the mutual trade in pigs and pigmeat has become fully liberalised. Both the CR and EU had been preparing for the changes since 2000 when the system of mutually applied non-tariff quotas started to be applied, whereby the quotas were regulated and the system was called „double-zero“. Already at that time the quotas had been completely used from the side of the EU, but not from the side of the CR.
Since the EU enlargement, trading quickly increased by 100% with a negative balance for the CR side. Interesting but rather unfavourable were the Czech exports of live pigs which had a 50% share of the total exports in 2004. Generally speaking the Czech Republic exports live annimals with lower added value and imports processed pork and meat products with higher added value. The export of live animals is mainly to the EU-15 markets as a result of higher prices and shorter payment terms.
Until 2003 the predominant imports were frozen pigmeats mainly for further processing. The ratio became balanced in 2004, and in 2005 there was a clear majority of the imports of fresh pigmeat making 70% of the total volumes.
In 2005 the imports of piglets exceeded the exports although previously the ratio was opposite due to the subsidised piglet exports. In H-1, 2005, a total of 8 100 piglets were imported, with 6 500 heads from Germany, and 1 600 heads from the Netherlands. A mere 700 piglets were exported to Croatia.

4.2.) Commodity trade

The trends in foreign trade since the EU enlargement have been characterised by live pigs exports in order to get better a price and quicker payment. Processors increasingly purchased meats in Poland or they even started to slaughter the animals in Poland and to import meats off -bone for processing. As a consequence of this development pig farmers and meat processors were quite suddenly hit by exports of raw material (live pigs) while the Czech export of value added items (meat-products) to the EU is quite low and difficult.
Imported breeding animals are used on mother or father positions in subsequent breeding.

Pigmeat and live pigs foreign trade volumes in CZK mln

	2003	**2004**	**January – May 2005**
Imports	1357	3368	2071
Exports	551	1416	725
Balance	-806	-1952	-1346

Source: Customs Statistics

Foreign trade with pigmeat (in tonnes)

	1998	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**Change 2004/2003**	
								tonnes	**%**
Imports	22943	16495	13566	15811	24142	28457	62933	+34476	+121
Exports	19060	5791	4054	8154	16106	9145	14437	+5292	+58
Balance	-3883	-10704	-9512	-7657	-8038	-19312	-48496	-	-

Source: Customs Statistics

Foreign trade with live pigs (in tonnes)

	1998	1999	2000	2001	2002	2003	2004	Change 2004/2003	
								tonnes	%
Imports	1179	280	55	28	198	49	572	+523	+1067
Exports	11143	5086	2328	2630	7118	4415	23297	+18882	+428
Balance	+9964	+4806	+2273	+2602	+6920	+4366	+22725	-	-

Source: Customs Statistics

The imported breeding animals mainly come from France, next from Germany and the Netherlands. Live pigs are exported to Germany and Slovakia, followed by Hungary. For a long time already, Slovakia has been the major exportmarket for Czech pigmeat, with lesser volumes exported to other neighbouring countries. Major imports of pigmeat have come traditionally from Germany, and to much lesser extent from Poland, Denmark, Austria and the Netherlands.

Structure of foreign trade in January – December 2004

		Import		Export	
		tons	Thous. CZK	tons	Thous. CZK
0103 10 00	Breeding pigs	48	6 614	71	4 188
0103 91 10	Pigs up to 50 kg	0	0	731	32 076
0103 92 11	Pigs more than 160 kg	0	0	0	0
0103 92 19	Pigs more than 50 kg	0	0	3 613	103 231
TOTAL	**0103 (Live pigs) =**	**48**	**6 614**	**4 415**	**139 495**
0203 11 10	Pig meat cooled	596	17 732	4 470	173 815
0203 12 11	Legs of pork - cooled	5	238	20	1 252
0203 12 19 0203 12 90	Shoulders - cooled	0	0	76	3 664
0203 19 11	Front meat – with bones, cooled	71	3 654	1 603	70 198
0203 19 13	Saddle with bones - cooled	3	197	10	768
0203 19 15	Fatback - cooled	13	553	6	247
0203 19 55	Pork meat – other parts – debouned cooled	3 767	184 486	138	9 341
0203 19 59	Pork meat – other - cooled	0	0	235	9 959
0203 19 90	Pork meat – colled splitted body	0	0	75	2 745
TOTAL	**CHILLED MEAT =**	**4 455**	**206 860**	**6 716**	**277 135**
0203 21 10	Pork meat body or splitted - frozen	105	2 428	0	0
0203 22 10 0203 22 90	Legs and shoulders - frozen	0	0	178	11 441
0203 29 11	Front meat with bones., frozen	453	21 192	27	1 328
0203 29 13	Saddle with bones - frozen	782	30 759	202	11 920
0203 29 15	Saddle with bones - frozen	676	24 695	219	8 712
0203 29 55	Pork meat – other parts – debouned – frozen	21 793	1 056 018	1 588	91 094
0203 29 59	Pork meat – other - frozen	139	6 128	184	7 854
0203 29 90	Pork meat –splitted body - frozen	1	22	29	1 802
TOTAL	**FROZEN MEAT =**	**23 949**	**1 141 242**	**2 429**	**134 152**
TOTAL	**0203 (FROZEN and COOLED) =**	**28 404**	**1 348 102**	**9 145**	**411 287**
TOTAL	**FAT 0209 =**	**7 043**	**91 464**	**30**	**471**
021011-19	Pork meat **smoked**	175	35 089	4	170

Structure of foreign trade in January – September 2005

		Import		Export	
		tons	Thous. CZK	tons	Thous. CZK
0103 10 00	Breeding pigs	420	41 586	545	9 156
0103 91 10	Pigs up to 50 kg	919	54 359	154	2 246
0103 92 11	Pigs more than 160 kg	0	0	831	23 856
0103 92 19	Pigs more than 50 kg	617	22 474	14 773	422 131
TOTAL	**0103 (Live pigs) =**	**1 956**	**118 419**	**16 303**	**457 369**
0203 11 10	Pig meat cooled	14 464	639 897	9 953	451 536
0203 12 11	Legs of pork - cooled	4 149	223 735	149	7 606
0203 12 19 0203 12 90	Shoulders - cooled	3 060	153 859	370	24 040
0203 19 11	Front meat – with bones, cooled	1 615	73 875	1 095	62 746
0203 19 13	Saddle with bones - cooled	1 688	115 421	413	30 580
0203 19 15	Fatback - cooled	4 382	228 497	453	24 054
0203 19 55	Pork meat – other parts – debouned cooled	21 572	1 310 028	1 840	135 027
0203 19 59	Pork meat – other - cooled	1 620	66 001	65	2 631
0203 19 90	Pork meat – colled splitted body	1 703	107 270	262	9 173
TOTAL	**CHILLED MEAT =**	**54 254**	**2 918 585**	**14 600**	**747 393**
0203 21 10	Pork meat body or splitted - frozen	24	1 776	0	0
0203 22 10 0203 22 90	Legs and shoulders - frozen	245	14 535	53	3 327
0203 29 11	Front meat with bones., frozen	570	26 722	56	3 118
0203 29 13	Saddle with bones - frozen	502	26 966	165	9 309
0203 29 15	Saddle with bones - frozen	1 876	83 239	3	196
0203 29 55	Pork meat – other parts – debouned – frozen	18 752	953 162	825	57 102
0203 29 59	Pork meat – other - frozen	355	12 586	85	2 587
0203 29 90	Pork meat –splitted body - frozen				
TOTAL	**FROZEN MEAT =**	**22 395**	**1 126 947**	**1 190**	**75 827**
TOTAL	**0203 (FROZEN and COOLED) =**	**76 649**	**4 045 532**	**15 790**	**823 220**
TOTAL	**FAT 0209 =**	**9 745**	**165 616**	**148**	**3 031**
021011-19	Pork meat **smoked**	421	57 150	250	15 692

4.3.) Outlook

The foreign trade structure has indicated that the primary production (farmers) alone can be competitive on EU market due to lower costs and using large-scale production technologies and the pigs can be put out at competitive prices. The increased imports of breeding animals and piglets for breeding or fattening have confirmed the breeders´ potential and their interest in the investments and in pig breeding development. The exports of the raw meats and the re-imports of finished products indicate a less competitive processing sector and missing links to the EU markets.

5) Distribution/retail: present situation and future developments

5.1.) Core information

Retail chains and their hyper/supermarkets have dominated the retail sales. Their arrival in CR in early 1990s was accepted as evidence of new better times, and for the customer it was an entirely new, recently unknown and attractive way of shopping.
The share of the sales in the chains is now estimated at 75% of the entire retail food sales.
In the early 1990s the centres were naturally built in large towns, and currently some of the chains are represented in all towns with more than 10 000 inhabitants. The supermarkets have become popular shopping and entertainment centres and often the places for weekend trips.

The farmers and food producers, however, see the retail chains through different eyes. They fell under a strong pressure for lower prices. The chains in CR often apply elements of trade policy which are not always applied in the old EU-15 countries. The supplier of the chain network must first pay high „listing“ fees, i.e. fees for the product introduction on the shelf. Sales actions fees and outlet opening fees are requested frequently. At the same time the chain´s payment terms are often long, extending even up to 3 months.
The pressure for low prices has been made regardless of the product quality and it has caused lower quality of meat products. The Union of Meat Processors therefore has initiated and participated in the elaboration of a regulation which requires correct contents composition of certain traditional meat products. The State has introduced standards for the contents of the components in the most popular meat products.
There are only few farming cooperatives or meat processors running their own retail shops. Marketing organisations are not involved in retail.

Survey of food retail chains in CR – December 2005

Name	Mother company	Number of outlets
Makro	METRO CASH & CARRY	12
Hypernova	AHOLD	50
Albert	AHOLD	184
Tesco	TESCO	31
Delvita	DELHAIZE GROUP	97
Penny Market	REWE	157
Billa	REWE	76
Terno	JEDNOTA	4
Tempo, TIP	JEDNOTA	77
Interspar	SPAR	18
Globus		10
Carrefour		10
Lidl		Figure not provided

Sources: Official company websites
Most chains do not give details of their turnover in CR
Julius Meinl merged with Ahold in 2005 and was renamed as Albert.
Carrefour sold its outlet network to Tesco in 2005.

TOP 10 OF BUSINESS COMPANIES BY SALES IN 2005 (gross sales including VAT)

Rank	Group/ Cmpany	sales 2004		sales 2005		change 2004
1	**Makro Cash&Carry ČR, s.r.o.**	**38.2**		**37.5**		**-0.7**
2	**Schwarz ČR**	**31.5**	*	**37.0**	*	**5.5**
	Kaufland, v.o.s.	*23.5*	*	*25.0*	*	*1.5*
	Lidl CR, v.o.s.	*8.0*	*	*12.0*	*	*4.0*
3	**Ahold Czech Republic, a.s.**	**34.6**	*	**36.0**	*	**1.4**
4.	**REWE ČR**	**22.8**	*	**23.2**	*	**0.4**
	Billa, s.r.o.	*8.0*	*	*8.0*	*	*0.0*
	Penny Market, s.r.o.	*14.8*		*15.2*		*0.4*
5.	**Tesco Stores ČR, a.s.**	**20.5**	*	**22.0**	*	**1.5**
6. - 7.	**Globus ČR, k.s.**	**18.9**		**19.0**		**0.1**
6. - 7.	**Tengelmann ČR**	**18.3**	*	**19.0**	*	**0.7**
	Plus - Discount, s.r.o.	*12.4*	*	*13.0*	*	*0.6*
	OBI - systémová centrála, s.r.o.	*5.9*	*	*6.0*	*	*0.1*
8	**Spar ČR (Spar Česká obchodní, Spar Šumava)**	**10.0**		**11.3**		**1.3**
9.	**Carrefour ČR, s.r.o.**	**10.0**	*	**11.0**	*	**1.0**
10	**Delvita, a.s.**	**9.9**	*	**9.8**	*	**-0.1**
1.-10.	**CELKEM**	**214.7**	*	**225.8**	*	**11.1**

* = sales including VAT were approximated by INCOMA Research, based on preliminary economic results in 2005.
Source: Research + Moderní obchod

Source: Incoma Research and Moderní obchod

5.2.) Outlook

CR has one of the most dense networks of international retail chains with a large share of retail sales. The chains have invested heavily, and there has been a fierce competition amongst them which causes a backfire on the suppliers and further on the primary producers. A falling number of the retail chains can be expected in the country with a subsequent reduction of their shops or supermarkets. Their activities are likely to be slightly regulated by legislation for example like in Germany or France. There will definitely be more frequent checkups of the quality of the food products on the shelves. There are strong calls for legislative regulation dealing with the food prices below their production costs, with various fees and payment regimes as well as required audits (private certification) which is more demanding than EU legislation. The government´s political decision will be of decisive importance.

6) Supply sector: present situation and future developments

6.1.) Genetics

Generally speaking, the standard of genetics in pig breeding has been less good than in the more advanced countries. Czech pig breeders´ general breeding results have been less competitive, mainly in the number of piglets born alive and reared per litter per year. With a difference of up to 5 piglets reared per sow per year there is a significant economic difference. The herds consist significantly of the typical Czech White Thoroughbred Pig which used to be a national breed improved and reared for a long time. Only in 1970s the crossbreeding with the Danish Landrace took place with the result of a hybrid with 50 to 75% of Landrace, and the resulting pig has been called Czech Landrace.
After 1990 this method of breed improvement continued with the Czech Union of Pig Breeders being the coordinator. Many breeders/farmers, however, are not Union members, or they have their own improvement and cross-breeding programmes for their production purposes. Individual firms have their own improvement programmes which are often not generally available.
The Czech Union of Pig Breeders has responded in its improvement programme to the weaknesses of the Czech farmers by introduction of the breeding of super-fertile lines with the aim of improving the production parameters of the breeding animals.
It can only be estimated that 70 – 80% of pig breeders purchase the breeding animals, i.e. the sows and the boars´ sperm from the traditional local improvement companies which entered the domestic market in the second half of the 1990s.

There are in total 11 companies entitled and empowered to deal directly with genetical material (insemination, import/export), collection and processing of data linked with insemination, breeding and yield control.

6.2.) Housing and housing equipment

The market has always supplied and offered technologies for pig rearing from almost all of the most important (international) technology producers. Also several traditional Czech producers are operating on the domestic market. Some of the domestic producers have terminated their activities during the recent 15 years, some foreign companies have established themselves very well, some of them have already left the Czech market. The pig producers for a long time did not have enough financial means to purchase the most modern housing and feeding systems, and thus very often, systems without the most modern technical achievements were purchased even from the world renown producers. Some of the herds have been equipped very well, but in many cases the pigs are reared in rather more extensive systems although they are in fairly large concentrations.

6.3.) Pig nutrition

A number of suppliers operate in this field, as it is a specialized field of pig rearing. Many large herd owners produce their own feeds, i.e. they mix their feed compounds independently, while other pig producers purchase the feed compounds.
Pig producers with their own mixing equipment have to purchase feed complements from Czech or foreign suppliers who are at the same time important consultants in pig nutrition.

The major feed compound producers in CR are ZZN companies falling under the Agropol Group. Other similar firms belong to Agrofert Holding. Both groups are the main purchasers of grains in the country, and the pig producers have a part of their own grains processed into feed compounds with their own recipes or they use the supplier´s recipe. A small part of pig producers purchase the feeds from mobile mixing stations operated mainly by Schauman CR and Sano CR.

Feed compound production in CR (000 t)

Animals	2002	2003	2004
Pigs total	1417	1475	1345
Poultry total	1085	1038	1078
Cattle total	499	498	522
Other animals∗	103	127	96
Farm animals and other animals total	3103	3138	3041
Pet animals	108	121	103
Feed compounds total	3211	3259	3144

∗ including fish, horses, rabbits, sheep, goats, forest game, ZOO animals.
Source: Czech 2004 Agriculture General report, MoA CR

Average annual prices of feed compound producers in CR in CZK/t

Feed compound for	Year					Index 2004/03*100
	2000	2001	2002	2003	2004	
Pigs over 65 kg	4751	5383	5030	4590	5015	109,26
Sows	4712	5384	5069	4872	5363	110,08
Piglets	8527	9339	8965	8381	8349	99,62
Pre-fattening pigs	5194	6030	5506	5176	5805	112,15
Fattening pigs	5119	5883	5311	4934	5502	111,51

Source: Situation and Outlook Report MoA CR

6.4.) Veterinary medicines

Most world veterinary medicines suppliers and representatives are probably present on the Czech market. The authorisation for the application of veterinary medicines in CR differs from most EU countries and the pig producer alone is not allowed to apply prescribed veterinary medicines even if it is the case of routine vaccination or surgical matters such as castration. The prices of veterinary care is about a half the price of those in the advanced economies while the prices of medicines are roughly on a comparable level.

7) Foreign investments

Only a small number of foreign investors are involved in primary production in CR and they are mostly concerned with crop production. They are usually farmers from other EU (15) countries. The reason is that foreign nationals are not allowed to purchase farmland during the 7-year transition period until 2010. This regulation has been by-passed by foreign investors by the establishment of a limited liability company whose partner is a citizen of CR. A far more complicated problem of land purchase is the fact that land ownership in CR is very fragmented.
At present there is no known foreign involvement in the slaughter/processing sector other than the J&T Finance Group involvement. Some of Czech processors will become weak in the future. These could be overtaken by present big groups or they can be bought by foreign investors.

8) Institutional sector

The sector of agriculture and food is administered by the **Ministry of Agriculture** (MoA, www.mze.cz). Within the organisation structure of the MoA the pig primary production belongs under the Agricultural Commodities Section, Animal Production Commodities Department and the pork processing belongs under the Food Production Section-Food Authority.
On the regional, local level, the MoA is represented by 63 Agricultural Agencies, which are responsible for the administration and management of tasks on the local level. Farmers usually deal with these agencies in solving items which belong in the decision field of the MoA (applications, subsidies, approvals etc.).
The Ministry of Agriculture is directly or indirectly managing several agencies and administrations, from which the most important for the pig/pork sector are the following:

The **State Veterinary Administration** (www.svscr.cz) monitors, evaluates and controls the animal-health status, asseses and manages risks in primary production as well as in processing. Its headquarter is in Prague, furthermore there are 14 regional administrations in regional capitals and district inspectorates in each district in order to cover the whole territory of the Czech Republic. Seven State Veterinary Diagnostic Institutes (the biggest being in Prague www.svupraha.cz, in Jihlava www.svujihlava and in Olomouc www.svuolomouc.cz) cover and perform veterinary diagnostics. For the pig farmer and pork processor the district directorate and its professionals are direct partners, besides the private veterinary practitionner who cares for individual animal health and who is a member of the **Chamber of Veterinary Surgeons** www.vetkom.cz ;

The **State Agriculture Intervention Fund** (www.szif.cz) has a function of a paying agency to administer the agricultural payments within the system of the CAP.

Agricultural research and advisory services also belong to the administration of the ministry of agriculture. Agricultural research is taken care of by reserach institutes and in the field of animal sciences the most important institutes for the sector of our interest are:

- the **Research Institute of Animal Production** (www.vuzv.cz),
- the **Research Institute of Agricultural Economics** (www.vuze.cz).

The advisory activities linked with agriculture belong to

- the **Institute of Agricultural and Food Information** (www.uzpi.cz) which co-ordinates consultants whose work is partly covered by the State. The advisory services have not been used very much in the primary sector as most of the management workers in farming companies have university degrees. The advisory sevices have been strengthening their position through preparing projects for the EU subsidy funding;
- the **Institute of Scientifical and Technical Information in Agriculture** (www.uvtiz.cz) with and extensive library and information system.

There are several umbrella organisations, non governemental organisations, representing the primary producers and farmers. The **Czech Agrarian Chamber** (www.agrocr.cz) is a

classical agrarian chamber which members are associations and unions representing different primary production sectors as well as individual members; legal persons whose membership is organised on a local, regional level (there are 60 regional agrarian chambers). The professional association for pig farmers, and member of Agrarian Chamber is the **Association of Pig Farmers in Czechia and Moravia** (www.schpcm.cz). The Agrarian Chamber is also running an information portal for farmers and breeders www.apic-ak.cz with statistical, factual and contact information. The **Agricultural Association** (www.zemsvazpraha.cz) is another NGO trying to defend the interests of Czech farmers, mainly of the big entreprises and cooperatives. The **Association of Private Farming** (www.asz.cz) is associating the private farmers. Food processors and producers are associated in the **Food Chamber** (Association of Food and Drinks Producers, www.foodnet.cz) . The direct representative of meat producers and processors, also a member of the Food Chamber, is the **Czech Meat Processors Association** (www.cszm.cz). The identification, registration and evidence of farm animals as well as keeping and processing of all the relevant data is performed by the **Czech-Moravian Breeders Society a.s.** www.cmsch.cz. Agriculture technologies producers and sellers are associated in the **Agricultural and Forestry Machinery Association A.Zet** www.zetis.cz . Main animal feed companies are associated in the **Czech and Moravian Association of Agricultural Supply and Purchase Organisations** www.cmsozzn.cz.

9) SWOT

It should be noted that the SWOT is prepared from the ***Czech perspective***.

Strengths

- university graduated management staff in farms and enterprises
- animal housing predominantly in large-scale facilities
- general awareness of the necessity of higher animal concentrations and of the introduction of most modern technologies
- existence of relatively large companies with a possibility of major investment
- relatively low rent for farm land and relatively cheaper labour force
- high share of live animals in total exports indicate the breeders´ competitiveness
- farmers cost production competitiveness
- stabilised liking and high consumption of pork in CR

Weaknesses

- lacking uniformity in agricultural primary production in the sense of business organisation as well as concerning the views of the future of CAP
- lower willingness to be engaged and invest in pig production as a non-regulated and non-subsidised area of CAP, generally higher farmers´ demand for business security
- construction backwardness, most capacities built prior to 1990
- technological backwardness, often just the inevitable modernisation has taken place
- low share of sales through marketing organisations
- complicated decision-making process in larger farming enterprises
- lower farmers´ willingness to associate in marketing organisations with the objective of uniting production and achieving better prices
- less productive processing industry, its indebtedness, less ability to export to foreign markets

Opportunities

- use of large-capacity housing for the improvement of animal productivity and the introduction of modern technologies using the educated and relatively cheap labour
- pig prices on the domestic market are still lower than those on the old EU-15 markets

Threats

- cheap pigmeat imports from countries with top breeding results, such as from Denmark, Germany or the Netherlands, or from countries with cheap production such as Poland and those further East

10) Possibilities for Dutch agribusiness for trade and investment

There is an opportunity for the improvement of production results of the pigs, i.e. increasing the genetic potential of the breeding animals and consequently of the production stock. Insufficient sow fertility of the domestic breeds is the main problem. Meat quality at the current prices appears to be sufficient for the domestic consumer.
Many pig herds including the important ones must necessarily be modernised in the future, namely their housing and feeding technologies. The existing split of the market between the domestic and foreign technology suppliers is a result of more than a decade of efforts and construction of market networks and their background. There are ample firms on the domestic market, however, which are interested in expanding their services and technologies provided so far.
There has been no important foreign investor in the large meat combines in the country so far. There are medium and smaller meat plants which will be under strong pressure of competition on the domestic market and they have even more difficulties in reaching the EU markets.
In the trading sphere, there are opportunities of purchasing live pigs or even of pigmeat as both the commodities are competitive with their prices on the „western“ markets. The domestic traders are considered as unsatisfactory in their efforts to penetrate the western markets with their commodities or products.

Annex 1. Description of selected farms

AGPI Písek

Ing. Jan Cech, general manager of the company, provided the Zemedelec farmers weekly newspaper and Nas chov (Our Herd) monthly magazine with the following information:
AGPI Pisek is a joint stock company with assets worth CZK 470 million. The company was founded in 1989, originally from the Joint Agricultural Enterprise in the Pisek Region.
AGPI is specialising in several activities – pig production, egg production, broiler chicken fattening, crop production (2 650 ha, next year another 2 000 ha to be added), and agri-chemical services.
The AGPI turnover in 2001 was CZK 723 m (EUR 24.1 m). In 2002 with the then poor farmers prices the turnover was CZK 650 m (EUR 21.6 m). The major share of the turnover (some 42 %) had the pig production division with the annual supply of 7 500 – 8 000 tonnes of pigmeat. The main purchasers of the pigmeat have been Maso Plana a.s., Meat Combine Pisek and Masna Pribram.
Immediately after 1990 a decision has been adopted to start building AGPI´s own farrowing houses. Seven farrowing units were purchased or reconstructed step by step in the Pisek, Tabor, Kladno and Pilsen regions. These efforts were completed in 2001 when the closed herd was achieved.
Currently, AGPI Pisek has some 4 200 sows in the production herds with the follow-up breeding and fattening units. However, the technologies and equipments are obsolete and that is why the company has recently started to carry out the project of reconstruction of the farrowing houses. The project should improve the animals´ welfare and their rate of productivity should also go up. The public tender for the first stage of the development – the reconstruction of 398 farrowing places at the Prilepov and Prestenice farms – has been won by Agrico Trebon representing the Austrian Schauer Co. The investment is worth CZK 18 m, of which 40% is to be covered through the Sapard Programme. The farrowing houses are to keep the slatted floors which should be equipped with the technology of the Agrivan-type pens supplied by Agrico.
It was planned to start the reconstruction works earlier but AGPI hesitated to do so with respect to poor prices then paid for pigmeat, and the company did not want to overfinance itself.
The current disorder on the market resulted in a close-down of one meat combine and the pig producers in the region started to supply their meat elsewhere, but a local oversupply followed subsequently.
The general manager declined to disclose their production price per kg of fattened pig, but he admitted that in 2004 it was the first time in its historythat the company ended the year in red figures.

AGPI/Přílepov

The information has been provided by Ing. Blecha, of the pig production centre. This AGPI unit employs 19 workers looking after 700 sows alternating in six farrowing houses. The farrowing houses are linked with the breeding and fattening units, and in total there are 12 pighouses within the centre. They have just started preparing the farrowing houses reconstruction.
A house consists of 34 pens in two rows with a passage between them. The centre applies a classical batch system with the average weaning after 24 to 28 days, followed by seven weeks of rearing in group housing with self-feeders for dry feed. Fattening takes place in a unit with

loose housing in 50 pens each for 9 head of pigs. Liquid feed is computer-rationed automatically and served 4-times a day after each 6 hours. Average weight gains are 700 g. The animals of all categories are housed on slatted floors which requires the company to run a system of slurry and dung management. The current technology does not allow to efficiently remove the bad smell and ammonia from the pighouses coming up from the space under the slatted floor. The pighouses are hard to ventilate namely in wintertime since with active ventilation the temperature inside the farrowing hall falls considerably. The new technology should solve the problem.
With the current rearing technology, the mortality has been 10 – 12% and the average number of piglets reared per sow is 19 head per year. The reconstruction was completed by April 2005 with no interruption of the rearing works.

Production and Trading Cooperative (VOD) Jetrichovec

The information has been provided by ing. Jan Riha, VOD stock breeder. VOD runs a nuclear pig breeding programme. At the annual 2005 „Země Zivitelka“ Agricultural Show in České Budejovice (Budweis) VOD was awarded the first prize for the best collection of Landrace animals. VOD was ranking 1st in the productivity control statistics in 2002 among all breeding herds in CR in the category of the boar piglet growth intensity.
The VOD Cooperative farms in the Pelhrimov region at the elevation of 500 – 600m above sea level. It was established by the amalgamation in 1975 of cooperatives at Zhorec, Salacova Lhota and Jetrichovec. Three years after the Velvet Revolution it was transformed into a production and trading cooperative whose focus has been upon animal and crop production, transport and other services.
The climatic conditions in the Bohemian-Moravian Highlands together with the VOD´s focus on intensive animal production have important influence on the cropping system.
Their 1 650 ha of arable land grow mainly feeding grains, potatoes, oilseed rape, other fodder crops and non-food crops and caraway seed. Besides the nuclear Landrace breeding and reproduction programme the VOD animal production also runs a herd of 550 dairy cows. The cooperative has just been building a stable for 800 cows with loose housing and individual bedding which will be connected with a 28-cow milking parlour by DeLaval. The housing is to be completed by the end of 2005. The breeding programme involves transfer cross-breeding into Holstein cattle whose blood share has recently been about 75%. The still needed 300 cows or high-in-calf heifers which will be purchased as soon as possible.
VOD Jetrichovec has a 40-year tradition in breeding Landrace pigs. In 1962, after a long experience with White Thoroughbred they started to rear the then less usual and less attractive Landrace. They imported their first breeding gilts and boars from Poland. The history of nuclear breeding at Jetrichovec started on 16 October 1998 when VOD was among the first registered in CR.
The nucleus currently includes 150 sows, of that 35 mothers of boars. The herd with 80% insemination has been using the boars 31 Hadran (CPH 2681, deviation +3.9%), 32 Denver (CPH 1% TOP, deviation 3.2%), or Geiger imported from Germany and used at the insemination station at Radounka. Weight gains of the reared boar piglets are 711 g from the farrowing day, and 1154 g in the test at 63.5% of lean muscle.
In 2001 the construction of a large-capacity housing facility was completed for 220 sows including their progeny of up to 12 weeks of age. The house is divided into several sections – the farrowing unit, group housing of weaners, group boxes for pregnant sows, individual boxes for sows up to one month since insemination, and boar housing. Bedding is straw everywhere, and the two main slurry or dung corridors are emptied every morning. The feed

compound is wetted in the feeder and the compound is mixed according to the recipes of the nutrition specialists in the cooperative´s own mixing plant and using their own grains.
The piglets after weaning (28 days) stay in the pre-fattening units with the sows until about the weight of 20 kg, and in their 20th week of life they undergo productivity testing in the breeding plant at Rovna and Bedrichov. After eight or nine (boars) weeks of testing the percentage of lean muscle and the layer of fat are measured and the average gain during the testing and since farrowing is calculated. At six to seven months of age the examiners evaluate the animal´s exterior and then it is ready to be sold, the herdsman explained.
The pregnancy percentage after the first insemination is around 70%. After about a month the pregnant sow is transferred into a group box.
The marketing of breeding gilts and boars was a problem in the unfavourable year of 2005. In 2005 in 133 litters under control the number of piglets born alive increased to 12.4 and the successful rearing increased correspondingly to 10.3. The marketing was a problem. In 2004 a total of 308 gilts were approved and only 158 of them were sold. By the middle of 2005, of the 146 approved gils only 51 were sold. The sales have been falling each year. Some of the long-term customers in the Pisek region – ZD Lety, Kestrany and Mirotice – have gone out of business and others gradually lowered the volume of the purchased breeding animals.
As a result of the long-lasting low prices of slaughter pigs the breeders have been reducing their numbers of sows, they decrease their herd reproduction intensity and they slow down buying.

Vepaspol Olomouc, a. s.

Vepaspol Olomouc, a. s. was founded in November 1992 as a follow-up company of the Joint Agricultural Enterprise for Animal Production in Olomouc. It is situated in the Hana region in Central Moravia and its farms are situated in the Lower Jesenik uplands in the direction of Olomouc - Šternberk - Rýmařov. Its pigmeat production and breeding animals come from the closed herd applying a batch system in all weight categories of pigs.
The feeding of pigs is controlled by the growth and reproduction curves. The company has introduced a certified quality management system by Bureau Veritas Quality International CS, s.r.o. according to ISO 9001:94. In August 2002 the company was awarded ISO 14001.
The company has three production centres:

- **Centre Vepa Paseka**

A feeding house for 10 000 pigs. The slaughter pigs are produced in batches at the highest rate of quality. Slurry or dung are processed in a sewage treatment plant.

- **Centre Velký Týnec**

A production farm for piglets and breeding gilts with a capacity for 6000 pigs. The farm is a breed improvement unit within the company´s VEPIG hybridisation programme. Slurry or dung are stored in reservoirs and subsequently disposed of into the fields of the neighbouring farms.

- **Centre Dlouhá Loučka**

The largest of the farms with a capacity for 17 000 pigs of all categories. The farm produces piglets, breeding gilts and slaughter pigs. Slurry or dung are processed in a sewage treatment plant.

Annex 2. List of contacts
addresses of major producers, slaughterhouses, processors, importers, traders, distribution, supply companies, institutional sector

The biggest pig farmers (mentioned in chapter 1.3.)

SPV spol. s r. o.	Plevnice 42	393 01	Pelhřimov	
Vysoká, a. s.	Vysoká 1035	334 41	Dobřany	www.vysoka.cz
Agpi, a. s.	Vršovická ulice	397 01	Písek	www.agpi.cz

Centroodbyt – national marketing cooperative and its members

Company name	Address	Postal Code	Place	Websites
Centroodbyt - national marketing cooperative	Boženy Němcové 2625	530 02	Pardubice	www.centroodbyt.com
Members of Centroodbyt:				
Agroodbyt Moravské Budějovice	Bezručova 1125	676 02	Moravské Budějovice	
OHŘE - odbytové družstvo	Lišany 33	440 01		
Odbytové družstvo CENTRUM	Chýnovská 1917/9	390 02	Tábor	www.odcentrum.cz
Moraviamaso - odbytové družstvo	Pražská 335/50	679 61	Letovice	www.moraviamaso.cz
Odbytové družstvo Rožmberk	Dukelská 134/I	379 01	Třeboň	
Odbytové družstvo Jihlava	Znojemská 2716/78	586 56	Jihlava	
Agropork - odbytové družstvo	Čechyňská 23	602 00	Brno	www.agropork.cz
Regionální odbytové družstvo	Cholinská 1048/19	784 01	Litovel	
Mlecoop, Východočeská divize	Zemědělská 897	500 03	Hradec Králové	

Improvement herds with 26+ live-born piglets per sow per year

Herd	Statute	Region	Piglets born alive / litter	Piglets born alive sow/year
Breed: Czech White Thorough.				
1. Jihočeská a.s.	RŠCH	South Bohemia	13,4	31,7
ZD Stařeč	NŠCH	Cz/Mor Highland	12,5	28,9
Milotický hospodář	NŠCH	Olomouc	13,0	28,7
Dubné-Jaronice	RŠCH	South Bohemia	13,8	28,2
AgroSázava a.s.	RŠCH	Cz/Mor Highland	12,4	28,2
Zemědělská a.s. Býšť	NŠCH	Pardubice	11,9	28,1
Agro Jesenice, a.s.	NŠCH	Central Bohemia	12,8	27,5
ZD Olešenka	NŠCH	Cz/Mor Highland	12,3	27,1
ZD Křečhoř	NŠCH	Central Bohemia	11,8	26,5
ZOD Choustník	RŠCH	South Bohemia	11,9	26,5
Breed: Czech Landrace				
Miroslav Vyoral, Brumovice	RŠCH	Moravo/Silesian	14,5	29,5
Ing. Janeček, Velehrádek	NŠCH	Hradec Kralove	13,2	27,8
Zemas AG, a.s.	RŠCH	Cz/Mor Highland	12,0	27,0
ŠCH Kralice	NŠCH	Olomouc	14,3	26,8
R.A.B. s.r.o.	RŠCH	South Bohemia	11,6	26,6

RŠCH – reserve improvement herds
NŠCH – nuclear improvement herds

List of the biggest slaughterers and meat processors in CR

Kostelecké uzeniny, a. s.	Kostelec u Jihlavy 60	588 61		www.ku.cz
Maso Planá, a. s.	Průmyslová 499	391 11	Planá nad Lužnicí	www.masoplana.cz
Masna Studená, a. s.	Masná 480	378 56	Studená	www.masna-studena.cz
Masokombinát Písek CZ, a. s.	Novodvorská 1010/14	142 00	Praha 4	www.mkpisek.cz
Masokombinát Polička, a. s.	Kamenec u Poličky 300	572 23	Polička	www.mkp.cz
Masozávod Krahulčí, a. s.	Farní 71/4	586 01	Jihlava	http://krahulik.cz
Masokombinát Martinov, a. s.	Martinovská 3168/48	723 00	Ostrava	www.martinov.cz
Procházka maso-uzeniny, spol. s r. o.	Chelčického 627	413 01	Roudnice nad Labem	www.prochazka.cz

List of selected traders with animals or meat

Company name	Address	postcode	town	website
Animalco, a.s.	Na Kocínce 1	160 41	Praha 6	www.animalco.cz
Bohemia Breeding, s.r.o.	Radešínská Svratka 134	592 33	Žďár nad Sázavou	www.bohemiabreeding.cz

Breeding organizations

Company name	Address	Postal code	town
GENOSERVIS, a.s. Inseminační stanice kanců Močovice	Močovice	28601	Čáslav
CHOVSERVIS a.s.	Károvsko 1389	51101	Turnov
Inseminační stanice kanců Kout na Šumavě	Nový Dvůr 9	34506	Kout na Šumavě
Inseminační stanice kanců Račiněves		41301	Račiněves
Inseminační stanice kanců Salaš	Salaš 144	68706	Salaš
Inseminační stanice kanců Skršín		43401	Skršín
ISK Horní Rozsíčka		59251	Horní Rozsíčka
ISK Malejov	Malejov 20	56601	Vysoké Mýto
ISK Nová Ves		28902	Nová Ves
ISK Nový Dvůr	N. Dvůr 8	58301	Nový Dvůr
ISK Radouš		26724	Radouš
ISK Velké Meziříčí	Karlov 94	59401	Velké Meziříčí
ISKA	Hladná č.p. 12	39816	Albrechtice nad Vltavou
KASPER SG a.s.	Hostějov 31	68741	Hostějov
Reprogen a.s. Inseminační stanice kanců J.Hradec		37701	Radouňka
SOSK		67153	Němčičky
SOSK		66463	Žabčice
SOSK	Stará Pošta 67	66461	Rajhrad
SOSK Potštejn-Brná		51743	Potštejn-Brná
SOSK ŠVCH Frahelž		37816	Lomnice nad Lužnicí
SOSK Zboží		54401	Dvůr Králové n.L.-Zboží
Středisko pro odběr spermatu	Grygov č. 367	78373	Grygov
Středisko pro odběr spermatu kanců Hluboká		33165	Hluboká

ISK= Boars Insemination Station
SOSK= Centre for Boars Semen Collection

Domestic and foreign pig breed improvement firms operating on the Czech market

Company name	Address	Postal Code	place	website
Agro Jaroměř, spol. s r.o.	Rožnov 11	551 01	Jaroměř	www./sweb.cz/agro-jaromer/
Česká PIC s.r.o.	Žampachova 12	613 00	Brno	www.ceskapic.cz
Genoservis a. s.	J. Jabůrkové 1	779 74	Olomouc	www.genoservis.cz
Chovservis, a. s.	Zemědělská 897	500 03	Hradec Králové	www.chovservis.cz
Rostěnice, a. s.	Rostěnice č. 49	682 01	Vyškov	http://rostenice.wz.cz/rostenice/
TOPIGS CZ, s. r. o.	Svatopeterská 35/7	617 00	Brno	www.topigs.cz

List of selected State, scientific and professional organisations

Company name	Address	Postal code	town	website
Ministry of Agriculture ČR	Těšnov 17	117 05	Praha 1	www.mze.cz
Reserach Institute of Animal Production	Přátelství 815	104 01	Praha 114 - Uhříněves	www.vuzv.cz
Agrarian Chamber ČR	Štěpánská 63	110 00	Praha 1	www.agrocr.cz
Agricultural Union ČR	Hybernská 30	110 00	Praha 1	www.zemsvazpraha.cz
Association of Private Farming	Dělnická 30	170 00	Praha 7	www.asz.cz
Union of Pig Breeders	U Topíren 2	170 00	Praha 7	www.schpcm.cz
Food Chamber ČR	Počernická 96/272	108 03	Praha 10	www.foodnet.cz
State Veterinary Administration	Těšnov 17	117 05	Praha 1	www.svscr.cz

Summary of suppliers of feed complements and feed compound production technologies

Company name	Address	p/code	town	website
AgramM, spol. s r.o.	Světlov 378	687 71	Bojkovice	www.agramm.cz
AGROBAC	Dubec 38	348 06	Přimda	www.agrobac.cz
Agrodiagnostik v. o. s.	Božice 425	671 63	Znojmo	www.agrodiagnostik.cz
Agroservis Tachov, a.s.	Bor čp. 644	348 02	Bor	www.agroservistachov.cz
Alltechnology C.Z., sro.	Ve Žlíbku 1849/2A	193 00	Praha 9 - Horní Počernice	www.alltech.com/czech
BARENTZ spol. s r.o	Za Tratí 752	339 01	Klatovy	www.barentz.cz
Biofaktory Praha, s.r.o.	Na Chvalce 2049	193 00	Praha 9 – Horní Počernice	www.biofaktory.cz
Bioferm CZ, spol. s r. o.	Banskobystrická 55	621 00	Brno	www.bioferm.com
BIOSTA, spol. s r.o.	Kolperky č.p. 635/A	664 56	Blučina	www.biosta.cz
Bodit Tachov, s. r. o.	Luční 1791	347 01	Tachov	www.bodit.cz
Decart, s. r. o.	Lužná 591	160 00	Praha 6-Vokovice	-
Delacon Biotechnik, sro.	Bohdíkovská 7	787 01	Šumperk	www.delacon.cz
Doagra, a. s.	Cihlářská 511	344 23	Domažlice	www.doagra.cz
Fitmin, a. s.	Helvíkovice 90	564 01	Žamberk	www.fitmin.cz
GUYOKRMA, spol. sro.	Žirovnická 2389	106 00	Praha 10	www.guyokrma.cz
HIMEL CZ, spol. s r. o.	Tyršova 16	664 34	Kuřim	www.himel.cz
Iframix	Štěrboholská 26	102 00	Praha 10	www.infamix.cz
Indian Herbs (CZ), s.r.o.	S. K. Neumanna 2009/3	182 00	Praha 8	www.indian-herbs.cz
Kemin Central Europe sro.	Lužná 591	160 00	Praha 6	www.kemin.com/europe
Lohmann Animal Health GmbH & Co. KG	Staré Sedlo 90	398 07	Orlík nad Vltavou	www.lah.de
Medipharm CZ, s. r. o.	Starovice 215	693 01	Hustopeče u Brna	www.medipharm.cz
Mikrop Čebín, a. s.	Čebín 416	664 23	Čebín	www.mikrop.cz
NAVOS, a.s.	Čelakovského 1858	767 16	Kroměříž	www.navos-km.cz
NOACK ČR, spol. s r. o.	Květnového vítězství 68	149 00	Praha 4-Háje	www.noack.cz
Nutratech® s.r.o.	Mezírka 13	602 00	Brno	www.nutratech.cz
Phramed s.r.o.	Zámecká 8	742 35	Odry	www.phramed.cc
Rothel Praha, spol. s r. o.	Pod Kavalírkou 18	150 00	Praha 5-Smíchov	www.roethel.cz
Sano - moderní výživa zvířat, s r o.	Npor. O. Bartoška 15	344 01	Domažlice	www.sano.cz
Schaumann ČR, s. r. o.	nám. Svobody 35	387 01	Volyně	www.schaumann.cz
Schering-Plough CE/AG	Hudcova 533/78c	612 00	Třebíč	www.schering-plough.cz
Slavkovské krmné směsi,as		685 01	Marefy	www.sksmarefy.cz
TEKRO spol. s r.o.	Višňová 2/484	140 00	Praha 4	www.tekro.cz
TREWIT s. r. o.	Za Dvorem 305	763 14	Zlín	www.trewit.cz
Univit, s. r. o.	Na Vlčinci 3	779 00	Olomouc	www.univit.cz
Urseta spol. s r.o.	Pokorného 210	273 64	Doksy u Kladna	www.urseta.cz
VITAminER spol. s r. o.	Havlínova 1750	289 22	Lysá nad Labem	
VVS Verměřovice s.r.o		561 52	Verměřovice 159	www.vvs.cz
ZOD Žichlínek	Žichlínek 200	563 01	Lanškroun	www.zod.cz
ZZN Česká Skalice, a. s.	Říkov čp. 264	552 03	Česká Skalice	www.zzncs.cz
ZZN Nový Jičín, a. s.	Jeremenkova ul. č. 9	742 42	Šenov u N. Jičína	www.zznnovijicin.cz

List of pig breeding technologies suppliers in CR

Company name	Address	p/code	town	website
AGE s.r.o	Osvobození 448	517 71	České Meziříčí	www.age.cz
Agrico, s. r. o.	Rybářská 671	379 01	Třeboň	www.agrico.cz
Agroing Brno, s. r. o.	Veslařská 25	637 00	Brno	www.agroing.cz
ATOMVET s.r.o.	Ostašovská 521	460 01	Liberec 11	www.atomvet.cz
ATTIS BRNO spol.s r.o.	třída Generála Píky 3	613 00	Brno	www.volny.cz/attis-brno/
B Agro	Březová 130	747 44	Březová	www.b-agro.cz
BD Tech spol. s r.o.	Lohenická 607	190 17	Praha 9 - Vinoř	www.bdtech.cz
Commercial, s.r.o.	Smilova 400	530 02	Pardubice	www.commercial-pce.cz
Cooperativ, s. r. o.	Antala Staška 32	146 20	Praha	www.cooperativ.cz
CRS – Marketing s.r.o.	Čížkovice u Lovosic 83	411 12		www.crs-marketing.cz
FARMTEC a.s.	Skálova ulice 2489	390 02	Tábor	www.farmtec.cz
I-TEK CZ, s. r o.	Svatoslavova 849/24	140 00	Praha 4	
Ketris s.r.o.	Valchařská 36	614 00	Brno	www.ketris.cz
Kubart, s. r. o.	U Botiče 24	252 43	Průhonice	www.kubart.cz
MIK BOHEMIA s.r.o.	Závist 58	624 00	Brno	www.mik-bohemia.cz
ROmiLL, spol. s r. o.	Kotlářská 53	658 92	Brno	www.romill.cz
STARÝ PIVOVAR s.r.o.	Česká Bříza 57	330 11	Třemošná	www.starypivovar.unas.cz
TAURUS s.r.o.	Lány 52	537 01	Chrudim	www.taurus-sro.cz

List of veterinary preparations suppliers

Company name	Address	code	Town	website
Jansen Animal Health	Šumavská 6	120 00	Praha 2	www.janssen.com
Tekro	Višňová 2/484	140 00	Praha 4	www.tekro.cz
Biopharm (Fartro)		254 49	Jílové u Prahy	www.bri.cz
Intervet	Na Radosti 413	155 21	Praha 5	www.intervet.com
Virbac				www.virbac.cz
Pfizer Animal Health	Stroupežnického 17	150 00	Praha 5	www.pfizer.cz
Decart, s. r. o.	Lužná 591	160 00	Praha 6	www.dcr.cz
Ceva Animal Health Slovakia	Trnavská cesta 5	831 04	Bratislava	
Medipharm CZ	Starovice 215	693 01	Hustopeče u Brna	www.medipharm.cz
VITAminER spol. s r. o.	Havlínova 1750	289 22	Lysá nad Labem	vitaminer@seznam.cz
Novartis	U Nákladového nádraží 10	130 00	Praha 3	www.novartis.cz
Dyntec	Pražská 328	411 55	Terezín	www.dyntec.cz
Krka	Sokolovská 79	186 00	Praha 8 - Karlín	www.keka.si.sz
Bayer	Litvínovská 609/3	190 21	Praha 9	www.bayer-ag.de

Meat processors – pork

Company name	Address	postcode	town
ADEX AGRO a.s.	Lom u Tachova 20	34701	Lom u Tachova
AGRO - Měřín,obchodní společnost,s.r.o.	Zarybník 516	59442	Měřín
Agroprim Všetice, a.s.	Všetice 10	25744	Všetice
Agroprůmyslový kombinát a.s. Sedlnice	Sedlnice	74256	Sedlnice
Alfréd Latoň - Bruno Wieder	Na Kopci 92	74731	CHlebičov
ALIMA značková potravina a.s.	Kunovice 1467	68604	Kunovice
ALIMA značková potravina, a.s.	Antůškova 266	25601	Benešov
ALIMA-CZ,s.r.o.	Písečná 136	56170	Písečná
ALIMPEX - MASO, s.r.o.	U parku 207	25101	Dobřejovice
B - UNIPACK a.s.	Litostrovská 808	66501	Rosice u Brna
Bajer a spol., spol. s r.o.	Nová 715	68501	Bučovice
BEKKVA s.r.o.	Mlýnská 3331	58001	Havlíčkův Brod
BHJ GARANT s r.o.	Průmyslová 2050	59401	Velké Meziříčí
Bivoj a.s.	Jateční 2884/23A	74601	Opava - Předměstí
BOCUS a.s.	Letohrad-Orlice 282	56151	Letohrad
BOMASO, a.s.	Kikerleho 17	62700	Brno
Caizl Pavel	č. 199	27329	Koleč
Cajthaml Tomáš	Hlavní 182	25301	Chýně
CARNEX spol. s r.o.	Francova Lhota 298	75614	Francova Lhota
CROWN FOODS, s.r.o.	Sokolovická 214	26762	Komárov
Cutisin, s.r.o.	Víchovská 830	51419	Jilemnice
Červené maso P + P, s.r.o.	Osnice 91	25242	Osnice
Česká drůbež s.r.o.	Velký Malahov 39	34601	Velký Malahov
ČESKÁ MASNA s.r.o	Mělnická 1	25065	Líbeznice
Čestmír Lukš	Brněnská 287	69123	Pohořelice
D -K zemědělská a.s.	Žatecká 866	33141	Kralovice
D -K zemědělská a.s.	Kralovice č.p. 563	34141	Kralovice
DART s.r.o.	Plzeňská 61	33200	Plzeň
DELIKA H+H, spol. r.o.	U hřiště 21	62500	Brno
DQM s.r.o.	Chářovská 112	79401	Krnov
Dr. Oetker, spol. s r.o.	Jemnická 796	67602	Moravské Budějovice
Drda Josef	Jirkov 50	46822	Jirkov
DRUMAS spol.s r.o.	Družstevní 530	68725	Hluk
Družstevní jatka Sádek, družstvo	Sádek	67523	Sádek
Eduard Kazda-MASO KAZDA ÚPICE	Regnerova 258	54232	Úpice
EURO Doner Yuksel a spol.s.r.o.	Školní 289	41703	Mstišov
EUROEX spol.s r.o.	Skyřická 1	43401	Most
Fiala Miloš	Mírová 146	28923	Milovice nad Labem
FILEX s.r.o.	Předbranská 508	68801	Uherský Brod
FILEX s.r.o.	Vazová 2451	68601	Uherský Brod
FOLDA, s.r.o.	Bělíkova 1446	46401	Frýdlant v Čechách
František Janíček	Nám. Míru 26	66701	Židlochovice
František Šutera	Veselská č.581	67974	Olešnice na Moravě
FRIGOPRIMA spol. s r.o.	Pod nádražím 607	69201	Mikulov
FRIGOSERVIS s.r.o.	Břevnická 1823	58001	Havlíčkův Brod - Vršovice
GRONKA - PRODEJ, spol. s r.o.	Rozsíčka 51	67974	Olešnice na Moravě
Guseppe a.s. Rokytnice v O.h.	Rokytnice v O.h. 41	51761	Rokytnice v O.h.
H+B Jatky	U Oharky 915	43801	Žatec
Hadač a Zapletal, s.r.o.	Na mýtě 87	66501	Rosice u Brna
HAMÉ a.s.	Cerony 572	68703	Babice
Hanácký meat plant, a.s.Olomouc	Hamerská 19	77206	Olomouc

Holý Václav	Malovarská 275	27324	Velvary
HOPI s.r.o. Logistické centrum	Komerční zona Jažlovice	25101	Jažlovice
Hrobský Aleš	Řitka čp.1	25203	Řitka
HSP FOOD, s.r.o. Sazovice	Sazovice čp. 200	76301	Sazovice
HT Trading, s.r.o.	Nádražní ul.	69181	Březí
CHEBSKÝ meat plant, a.s.	Wolkerova 30	35092	Cheb
IDEMA FOODS spol. s r.o.	K Pasekám 4963	76001	Zlín
Ing. Jindřich Vokoun	Selská 81	61400	Brno
Ing. Miloslav Šefler	U jatek 126	34101	Horažďovice
Ing. Václav Kozel - ZOOINFORMA	Na Brodech 384	37501	Týn nad Vltavou
INPOST s.r.o.	Havlíčkova 6	68601	Uherské Hradiště
INPOST s.r.o.	Moravní nábřeží 299	68601	Uherské Hradiště
Intergal Vrchovina a.s.	Skořenice 135	56501	Choceň
Intergal Vrchovina a.s.,provoz Žamberk	Klostermannova 516	56401	Žamberk
INTRAMO ZNOJMO,spol.s r.o.	Trávní Dvůr	67168	Hrabětice
IVEMO, s.r.o.	Malotice 96	28163	Malotice
J. HLINKA, spol. s r.o.	Ul. 5. května	28911	Pečky
JABLUNKOVSKÁ JATKA spol. s r.o.	Jablunkov č.500	73991	Jablunkov
JACOM spol.s r.o.	Přerovská 761	76901	Holešov
Jan Malec	Petráveč č. 55	59401	Petráveč
Jan Prantl - Masný průmysl Žirovnice	Komenského 46	39468	Žirovnice
Jaromír Rada	Herálec č. 114	59201	Herálec
JAROMÍR STEINHAUSER, s.r.o.	Mojmírovo nám.20	61200	Brno
Jaroslav Jezdinský Žlunice 117	č. 29	50734	Žlunice
Jaroslav KOUBA, Řeznictví a uzenářství	K jatkám 408	38801	Blatná
Jaroslav Poslední	Hřbitovní ul.221	33023	Nýřany
Jaroslava Hamplová	Bojiště 99	54101	Trutnov
Jaroslava Klemensová - MASOMA	Opavská 62	74722	Zábřeh – Dolní Benešov
Jaroslava Vrtělová	Břest čp.274	76823	Břest
JATKA JAROSLAV BAREŠ - ŘEZNÍK, UZENÁŘ	Lužec nad Cidlinou č.p. 9	50362	Lužec nad Cidlinou
Jatka Lanškroun s.r.o.	Dukelských Hrdinů 359	56301	Lanškroun
Jatka Osov	Osov 73	26724	Osov
JATKA SVITAVY spol. s r.o.	Olomoucká 36	56802	Svitavy
JATKA Vodňany a.s.	U Jatek 348/II	38901	Vodňany
Jatka Zbiroh spol.s r.o.	Bezručova 347	33808	Zbiroh
JATKA-KURKA s.r.o.	K Rybníčkům 359	74781	Otice
Jatky Blovice s.r.o.	Hradišťský Újezd 20	33601	Hradišťský Újezd
Jatky CENTRUM, a.s.	Hradištko 700	28912	Hradištko
Jatky Čáslav s.r.o.	Chrudimské předměstí	28601	Čáslav
JATKY Český Brod a.s.	Jateční 316	28201	Český Brod
JATKY DOMAŽLICE s.r.o.	Týnské předměstí 92	34401	Domažlice
Jatky Duchcov s.r.o.	Jateční 63	41901	Duchcov
JATKY Hradský, s.r.o.	Písecká 594	38601	Strakonice
JATKY Lomnice a.s.	J. Kábrta 575	51251	Lomnice nad Popelkou
Jatky Moravský Krumlov spol.s r.o.	Znojemská 390	67201	Moravský Krumlov
JATKY Rosovice		26211	Rosovice
JATKY Sedlčany	U Panského mlýna 398	26401	Sedlčany
JATKY TISMICE, s.r.o.	Tismice 14	28201	Český Brod
Jatky Třebíč fa Antoň, spol. s r.o.	Žďárského 181	67401	Třebíč
JATKY Zezula- Jadrný, s.r.o.	Dolní Heřmanice č. 130	59401	Dolní Heřmanice
JATPEK, s.r.o.	Lesná 96	67102	Lesná
Jihočeská masna, s.r.o.	Pražská 530	37004	České Budějovice

Jiří Hrstka	U Vlečky 3291/11	40004	Ústí nad Labem
Jiří Papst	Oudoleň 96	58224	Oudoleň
Josef Filák	Horní Lideč 330	75612	Horní Lideč
Josef Kovář	Bobrůvka č. 12	59255	Bobrůvka
Josef Kvasnička - Řeznictví jatky	Solnická 438	51801	Dobruška
Josef Pospíšil - Výrobna lahůdek a uzenin	Tovární 1627	76901	Holešov
Josef Přikryl Petr Schweidler	Podvihovská 297/19	74770	Komárov
K Maso spol. s r.o.	Věstonická 12	62800	Brno
Karel Doležal	Jakubské nám. 50	67522	Stařeč
Karel Loskot - Řeznictví, uzenářství	Alběř 15	38733	Nová Bystřice
Kaufland Česká republika v.o.s.	Jesenická 91	25101	Modletice
Keprt František, řeznictví	Družstevní 33	78985	Mohelnice
KK - KŘEČEK Miloš	Sedlecká 99	25069	Klíčany
Klášterecké maso uzeniny, a.s.	Klášterec n.Orlicí 162	56181	Klášterec n. Orlicí
KLIMENT	Sokolovská 284	19000	Praha 9
KMOTR - Masna Kroměříž a.s.	Hulínská 2286	76701	Kroměříž
KMS spol.s r.o. Hluk	Novoveská 858	68725	Hluk
Kolínské maso a uzeniny, Petr a Miroslav Kasardovi	U Kostelíčka 60	28002	Kolín V
Kostelecké uzeniny,a.s.	Kostelec u Jihlavy 60	58861	Kostelec u Jihlavy
Krahulík-Masozávod Krahulčí,a.s.	Krahulčí 10	58856	Telč
KRATOCHVÍL-VÝROBNA	Nádražní 106	15000	Praha 5
Kulich Miloš	Palackého 443	28002	Kolín-Sendražice
L+O masné výrobky, s.r.o.	Průmyslová č.499	39111	Planá n.Luž.
LAGAD s.r.o.	Krušnohorské náměstí 72	36233	Hroznětín
LE-CO Ing. Jiří Lenc s.r.o.	Horní Jirčany 341	25242	Jesenice u Prahy
Libor Novák	Rudolfovská 103	37001	České Budějovice
LIGA,s.r.o.	Hlohovec 194	69143	Hlohovec
LIMUZÍN, spol.s r.o.		76312	Raková
Luděk Tirol-FAUNUS	Opavská 85	74901	Vítkov
MADE GROUP,a.s.	Kostelecká 894/61	19600	Praha 9
Makovec a .s. Prostějov	Smržická 537	79841	Kostelec na Hané
Makovec a.s. Prostějov	Zákantí 153	79817	Smržice
Mareček k.s.-řeznictví a uzenářství	Revoluční 39	58901	Třešť
MART-IN s.r.o	Převozní 15/51	40332	Neštědice
MASNA Příbram, spol. s r.o.	Jinecká 315	26101	Příbram
Masna Studená, a.s.	Masná 480	37856	Studená
Masný průmysl Česká Lípa s.r.o.	Dubická 957	47001	Česká Lípa
Masný závod Hovorany - jatky		69612	Hovorany
Maso - Třebovle s.r.o.	Třebovle 15	28161	Třebovle
MASO Hodonín s.r.o.	Na Výhoně 3035	69501	Hodonín
Maso Planá, a.s.	Průmyslová 499	39111	Planá nad Lužnicí
Maso Radvánovice, spol. s r.o.	Radvánovice 103	51101	Turnov
MASO SERVIS s.r.o.	Poštovní 1124	46311	Vratislavice nad Nisou
Maso V+W s.r.o.	Červený Dvůr	79401	Krnov
MASO ŽĎÁRSKO s.r.o.	Světnov 68	59102	Žďár nad Sáz.
MASO-DRŮBEŽ-UZENINY, s.r.o.	Chrudimská ul. 1703	28601	Čáslav
MASOEKO s.r.o.	Kunčice 243	56151	Letohrad
Meat plant JIČÍN spol. s r.o.	Konecchlumská 1075	50601	Jičín
Meat plant POKR a. s.	Markoušovice 211	54232	Úpice
Meat plant Štěpánek s.r.o.	Jateční 575	34815	Planá
MASOSPOL Městec Králové a.s.	Jateční 344	28903	Městec Králové
Masozávod Dolní Třebonín	Dolní Třebonín 194	38101	Dolní Třebonín
MASPRO, s.r.o.,Křičkova 3867/28, Hodonín	Velkomoravská 3543/87	69578	Hodonín
Matek Antonín Řeznictví,uzenářství	Labská 243/8	27713	Kostelec n/L

Matek Antonín Řeznictví,uzenářství	T.G.Masaryka 99	27713	Kostelec nad Labem
Matoušek František	Kondrac 57	25801	Kondrac
Městská jatka s.r.o. Vrchlabí	Lánovská 565	54301	Vrchlabí
MG servis s.r.o.	Sazovice 263	76301	Mysločovice
Milan Sláma	Růžová 225	59501	Velká Bíteš
MILKAGRO a.s.	Martinovská ul.3168/48	72300	Ostrava-Martinov
Miroslav Ulrich	Mladějovice 182	78501	Šternberk
Morava-maso s.r.o.	Borovského 1180	73401	Karviná-Ráj
MORAVAN, a.s.	Petřvald čp. 20	74260	Petřvald
Moravskoslezské drůbežářské závody PROMT a.s.	Mlýnská 192	74792	Háj ve Slezsku
MP Krásno, a.s.	Hranická 430	75701	Valašské Meziříčí
MP SOFT s.r.o.	U jatek 3	66491	Ivančice
N.D.S. s.r.o.	Beethovenova 4080	43001	Chomutov
Nosek Miroslav, Řeznictví a uzenářství	Studenec u Horek 306	51233	Studenec u Horek
NOSS, s.r.o.	U vlečky 5	61700	Brno
Novák Leoš, spol. s r.o.	Kudlov 41	76001	Kudlov
NOWAMEAT s.r.o.	Růžové údolí 553	27801	Kralupy nad Vltavou
P Z P MERLIN s.r.o.	Poličská 1365	53901	Hlinsko v Čechách
P&K Lahůdky s.r.o.	Fugnerova 9763	40501	Děčín
PATRIOT s.r.o. Břeclav - Jatky Podivín	Za drahou 918	69145	Podivín
Pavel Pešek - Řeznictví	Rokytnice 18	76321	Rokytnice
Pavlína Klemensová	Hlučínská 104	74724	Kravaře
Pejskar a spol., spol. s r.o.	Žďárská 296	54954	Police nad Metují
Petr Krátký	Borotice 125	67165	Borotice
POOSLAVÍ Nová Ves, družstvo	Nová Ves 178	66412	Nová Ves
Potraviny Vysočina, spol. s r.o.	Český Dvůr 123	58001	Havlíčkův Brod
PR market, s.r.o., PR 07	Dukelská 1017	73961	Třinec
PRAVE Rakovník,a.s.		27034	Velká Chmelištná
PRAVE Rakovník,a.s.	Na Spravedlnosti 1893	26901	Rakovník
PRIMA GROUP, a.s.	1.máje 156	79826	Nezamyslice
PRIMA GROUP,a.s.		79829	Tištín
PRIMA Karlovy Vary spol. s r.o.	Buchenwaldská 711/9	36005	Karlovy Vary
PRIMA Karlovy Vary spol. s r.o.	Sedlecká 1	36010	Karlovy Vary
Procházka spol. s r.o.	Chelčického 627	41301	Roudnice nad Labem
PROVIO a.s.	Černožice nad Labem 170	50304	Černožice nad Labem
Provozní jatky prasat - Velká Černá Hať	Velká Černá Hať 106	33161	Žihle
Přerovské jatky M.H. s.r.o.	Nábřeží Dr. E.Beneše 22	75201	Přerov
R & R Food s.r.o.	Mlýnská 265	66417	Tetčice
Rabbit Trhový Štěpánov, a.s.	Pod Nádražím 1206	28601	Čáslav
RACIOLA - JEHLIČKA s.r.o.	Pod Valy 221	68801	Uherský Brod
Radomír Jirka - J&J	Sklářská 333	28506	Sázava
Radomír Valčík	Cyrilometodějská 560	76601	Valašské Klobouky
Radoš Jaroslav - Řeznictví,uzenářství	Osecká 179	43511	Lom u Mostu
RAJA spol.s r.o.	Kuštova 471	26901	Rakovník
RAVY CZ a.s.	Norská 580/40a	46001	Liberec 11
Rochus s.r.o.	Kunovice č.1482	68604	Kunovice
RONA PLUS s.r.o.	Leštinská 2	78901	Zábřeh na Mor.
Rostislav Valčík	Vlárská 318	76331	Brumov-Bylnice
Rybářství Tábor, a.s.	Zavadilská č.2485	39002	Tábor
Rýznar Jiří, řezník a uzenář	Dvorská 19 a	78901	Zábřeh na Moravě
Řeznictví - uzenářství Francouz, s. r. o.	Skupice	53803	Heřmanův Městec

Řeznictví a uzenářství Náhlík & Náhlík	Kněždub 39	69664	Kněždub
Řeznictví a uzenářství u Dolejších s.r.o.	Na Javorce 303	25206	Davle
Řeznictví Felgr Jiří s.r.o.	Dolní Sloupnice 191	56553	Sloupnice
Řeznictví Kunovský s.r.o.	Bohuslávky 7	75131	Bohuslávky
Řeznictví Tichý s.r.o.	U studia 31	70030	Ostrava Zábřeh
Řeznictví-uzenářství Miroslav Janus	Hlučínská 4	72529	Petřkovice
ŘEZPOF spol. s r.o.	Brožíkova 862	33011	Třemošná
Sanytrák s.r.o.	Horní Lhota 191	76323	Hor. Lhota u Luhačovic
SELIKO Opava a.s.	Sadová 44	74642	Opava
SCHNEIDER - meat plant Plzeň s.r.o.	Podnikatelská 15	30100	Plzeň
SCHNEIDER - meat plant Plzeň s.r.o.	Jateční 47	30100	Plzeň
Slovácká Fruta a.s.	Na drahách 814	68604	Kunovice
Smola Pavel	Zahradní 1466	25001	Brandýs nad Labem
Sojka Karel	Kolínská 506	28161	Kouřim
SOMAK spol. s r.o.	Dlouhá 40	66451	Šlapanice u Brna
Spektrum,spol.s r.o.	U jatek 294	58813	Polná
Stanislav Holinka	Hněvotín 410	78347	Hněvotín
STATEK BOR ZEOS, spol. s r.o.	Šemnice 9	36272	Šemnice
Steinhauser s.r.o.	Karasova 378	66601	Tišnov
SUGAL,spol. s r.o.	Alžírská 6107/14	70800	Ostrava-Poruba
Sušické uzeniny, a.s.	Pražská 117	34201	Sušice
Šamša Miroslav	Zahradní 897	76824	Hulín
Školní statek Humpolec	Nádražní 101	39601	Humpolec
Šumavský meat plant, a.s.	Koldinova 672/II	33901	Klatovy
Těšínské jatky, s.r.o.	Na Olšinách 1	73701	Český Těšín
TIME s.r.o.	Leština u Světlé 75	58286	Leština u Světlé
TORAFLEISCH spol. s r.o.	Radimovice č.14	25169	Radimovice
TORO Hlavečník	CTSHP Hlavečník	53315	Hlavečník
TORO VM a.s.	Hradecká 251/II	56601	Vysoké Mýto
TORO VM a.s.	Choceňská 90/III	56601	Vysoké Mýto
TOZOS spol.s r.o.	Vojkovice č.49	73951	Vojkovice
TRADECO spol. s r.o.	Průmyslová 1152	68601	Uherské Hradiště
UNGRMAN	K Jezu 1	14000	Praha 4
Václav Balín	Nebřežiny čp. 78	33101	Plasy
Václav Zacpal	Smetanova 515	34901	Stříbro
VÁHALA a spol. s r.o.,výroba a prodej masných a lah.výrobků	Pod Humny 308	75366	Hustopeče nad Bečvou
VÁŠA spol.s r.o.	Potoční 2	47124	Mimoň
VELKOMA spol. s r.o., Václavská 9, Brno	areál mrazíren Zlín - Prštné	76001	Zlín
Vemas a.s.	Na Drahách 444	56401	Žamberk
Veseko, a.s.	Mikulášovická 552	40778	Velký Šenov
Vimperská masna, a.s.	Špidrova 84	38501	Vimperk
Vladimír Červenka-řeznictví-uzenářství-Vláček	Pražská 427	28163	Kostelec n. Č. l.
Vladimír Hájek H+H	Pod Štandlem 1414	73802	Frýdek - Místek
Vladimír Hájek-H+H	Hladké Životice 822/3	74247	Hladké Životice
Vladimír Zezula	Rudíkov 128	67505	Rudíkov
VLAMA, spol.s r.o.	Vlasákova 345	25801	Vlašim
Vlastimil Švondr	Kožlí	58293	Kožlí
VOMA spol.s r.o.	Moravská 94	68801	Uherský Brod
VOMA spol.s r.o.	Močidla 2475	68801	Uherský Brod
Výrobna lahůdek a uzenin,s.r.o. Josef Pospíšil	Palackého 503	76901	Holešov
Výrobna masných výrobků-Josef Pospíšil-s.r.o.	Tovární 1627	76901	Holešov

Vysočina a.s.	Hodice 1	58901	Třešť
XAVEROV,a.s.	V Lužích 735/6	14201	Praha 4-Libuš
Zámecká výrobna uzenin s.r.o.	Modletice č.1	25170	Modletice
ZD Vícov		79841	Lešany
Zelenka s.r.o.	Loosova 1	63800	Brno
Zemědělské družstvo Kokory	Štefánikova ul.	75103	Brodek u Přerova
ZEMKO k.s. Česká Skalice	Zelená 226	55203	Česká Skalice
ZEPO Bořitov, družstvo	Bořitov č.326	67921	Bořitov
ZEPOS a.s.	Radovesice 5	41117	Libochovice
ZŘUD - Meat plant Polička, a.s.	Kamenec 300	57201	Kamenec u Poličky
ZŘUD MEAT PLANT PÍSEK CZ,a.s.	Samoty 1533	39701	Písek
ZŘUD-MEAT PLANT PÍSEK CZ, a.s.	Samoty 1533	39701	Písek
Zvelebil Marek	Vrážská 325	25228	Černošice
Zvičinské uzeniny a lahůdky s. r. o.	Dolní Brusnice 78	54472	Dolní Brusnice

List of registered traders with live animals and meat

A.Q.A. spol. s r.o.	Kordačova 1844	27201	Kladno
A.W.spol. s r.o.	Palackého 4	78983	Loštice
ACE TRADE spol. s. r. o.	T. G. Masaryka 897	56201	Ústí nad Orlicí
ADAZ group s.r.o.	Cholínská 19	78401	Litovel
AGIROL CZ s.r.o.	Milana Fialy 245/2	70030	Ostrava-Dubina
AGRICOL s.r.o.	T. Novákové 521	57201	Polička
AGRI-Trading, s.r.o.	Sepekov 11	39811	Sepekov
AGRO - CB, spol. s.r.o.	Čsl.legií 26	37006	České Budějovice
AGRO-BIO spol. s r.o.	Bellušova 1861	15500	Praha 5
AGRODRUŽSTVO Miroslav	Nádražní č. 1207	67172	Miroslav
AGROFARM export - import s.r.o.	K. Světlé 2238	37004	České Budějovice
Agrofarma Syrovice s.r.o.	Syrovice 311	66467	Syrovice
Agrofruct a.s. Dolní Ředice	Dolní Ředice	53375	Dolní Ředice
Agroinvest Bobrová družstvo		59255	Bobrová
Agro-Novotný s.r.o.	Věstín-Bolešín 9	59301	Bolešín
AGROPODNIK Hodonín a.s.	Ratíškovice č.p. 1271	69602	Ratíškovice
AGROPODNIK ZNOJMO , a.s.	Dvořákova 21	66902	Znojmo
Agropol Food, s.r.o.	Opletalova 1535/4	11376	Praha 1
AGROTEAM, s.r.o.	Radešínská Svratka 186	59233	Radešínská Svratka
AHOLD Czech Republic, a.s.	Slavíčkova 1a/827	63800	Brno
ALCEDOR. s.r.o.	U Stadionu 502	37344	Zliv
Alibona, a.s.	Svatoplukova 909	78401	Litovel
ALIMPEX FOOD a.s.	Českobrodská 1174	19300	Praha 9
ALIMPEX GASTRO spol. s r.o.	Českobrodská 1174	19800	Praha 9
Alimpex spol.s r.o.	Zemské právo 1199 /5	10000	Praha 10
ALITEC spol. s r.o.	Moskevská 2726	39005	Tábor
ALL-IMPEX, spol. s r.o.	U Silnice 38	16100	Praha 6
ALMIKA s.r.o.	Dukelských hrdinů 974	17000	Praha 7
Alois Rozsypálek	Zeyerova 919/3	79001	Jeseník
ALTAMARK, s. r. o.	Revoluční 530	73801	Frýdek - Místek
ALVAC s.r.o.	Tesařská 2/322	73601	Havířov - Město
ANIMA CZ, s.r.o.	Křovice 14	27321	Hobšovice
ANIMALCO a.s.	Na Kocínce č.p. 1	16041	Praha 6
AQUA - Cichlid Jan Litoš	Božanovská 1616	19300	Praha 9
Artemia World s.r.o.	Proutěná 405/11	14900	Praha 4
Asian Bridges, s.r.o.	Pod Marjánkou 4	16900	Praha 6
ATCapital s.r.o.	Náměstí Míru 551	73961	Třinec
B - UNIPACK a.s.	Křenová 306/40	65998	Brno
Bajer a spol., spol. s r.o.	Nová 715	68501	Bučovice
BALTAXIA a.s.	U Nisy 604/15	46001	Liberec
BEECOM	Kounická 8	66491	Ivančice
BEEFIMPEX s.r.o.	K. Světlé 2238	37004	České Budějovice
BETAS s.r.o.	Lipovec 327	67915	Lipovec
BETTY CZ s.r.o.	Rubešova 458	53701	Chrudim IV
BH EXPORT - IMPORT, s.r.o.	č.p. 6	25264	Svrkyně
BHJ GARANT s.r.o.	Průmyslová 2050	59401	Velké Meziříčí
BIKOS CZ s.r.o.	Na Zákopě 561	77200	Olomouc
BIOGENTEC s.r.o.	Štichova 593	14900	Praha 4
BOHEMIA BREEDING,export-import		59233	Radešínská Svratka
BOLTON CZECHIA spol. s r.o.	Hviezdoslavova 29	62700	Brno
BOVIS N.B. spol. s r.o.	Švermova 545	37833	Nová Bystřice

BUDO-INVEST, s.r.o.	Viklefova 1813/20	13000	Praha 3
Bullex spol.s r.o.	Jílovišťská 48	15531	Praha 5
Bursia Praha s.r.o.	Starodubečská 601	10700	Praha 10
BUY DIRECT s.r.o.	Na Nivách 1054/7	14000	Praha 4
CALLIS, s.r.o.	Bubenská 122/20	17000	Praha 7
CANO CZ s. r. o.	V Ráji 262	53002	Pardubice
Carrefour Česká republika s.r.o.	Podbabská 17/81	16624	Praha 6
CatchMe s.r.o.	Čapkova 1690	25101	Říčany
CATRIN spol. s r.o.	Náměstí Míru 170/I	37701	Jindřichův Hradec
CENTROODBYT - národní odbytové družstvo	Boženy Němcové 2625	53002	Pardubice
CERAPHARM ČR, spol. s r.o.	Michelská 12a	14000	Praha 4
CEVINA s.r.o.	Za Lázněmi 867	51401	Jilemnice
COMIMEX, spol. s r.o.	Zdíkovská 2772/65		Praha 5-Smíchov
Comperio s.r.o.	Nuselská 53/1419	14000	Praha 4
Cosmina s.r.o.	Bakovská 892	19700	Praha 9
ČESKÝ CHOV, spol. s r.o.		29447	Ledce
Čestmír Lukš	Na Hrázkách 731	69123	Pohořelice
ČFOS spol. s r.o.	Přerušená 189	16000	Praha 6
DANIMPEX PRAHA, s.r.o.	č.p. 181	25063	Veleň u Sluh, pošta Mratín
DARMAS, s. r. o.	Dětmarovice 770	73571	Dětmarovice
Delika H + H,spol. s r.o.	Průjezdní 2	64200	Brno
DIUZ - CL, s.r.o.	Dubice 94	47001	Dubice
DM AGRO s.r.o.	Stallichova 3/935	14000	Praha 4
DRUKO STŘÍŽOV s.r.o.	Střížov 1 141	33411	Přeštice
DTN Distribution s.r.o.	28. října 321	27601	Mělník
Easy Food s.r.o.	Přerušená 189	16000	Praha 6
EKOSTRIX s.r.o.	Petra Jilemnického 89	50301	Hradec Králové
ELIMON a.s.	Jilská 2	11000	Praha 1
ELIPSA TRADE s.r.o.	Třída Tomáše Bati 1547		Zlín
EURO - FLEISCH	Příční č. 11	67172	Miroslav
EURO Döner Yüksel a spol s.r.o.	Školní 289	41703	Dudí u Teplice Mstišov
EURO FRIGO Praha, spol. s r.o.	Ovčí hájek 2355/68	15500	Praha 5
EUROBEN, s.r.o.	Tyršova 684	41705	Osek u Duchcova
Eurocat s.r.o.	Kříženeckého nám.	15000	Praha 5
EUROCORP s.r.o.	Masarykovo náměstí 42		Valašské Klobouky
EUROICE s.r.o.	Janderov 261	53701	Chrudim-Presy
EUROWAX s.r.o.	Dobronická 1257	14825	Praha 4
EXELSIOR Karviná s. r. o.	Dolní Marklovice 47	73572	Petrovice u Karviné
EXOLD, s.r.o.	Dlouhá Ves 125	51601	Rychnov n.Kněž
EXTRUDIA a.s.	Hlavní 112	69106	Velké Pavlovice
Family Frost, spol. s r.o.	Zubatého 11	15000	Praha 5
Findus C.R. a.s.	Záhřebská 23/170	12000	Praha 2
FISH MARKET	Rybářská 801	37901	Třeboň
FOLDA, s.r.o.	Frýdlantská 540	46401	Raspenava
FORTEL-TRI spol. s r.o.	Horní Těrlicko 788	73542	Těrlicko
František Krupka, K+K mezinárodní	Stínadla 1046	58401	Ledeč nad Sázavou
FRIGOPRIMA spol. s r.o.	Náměstí 25/26	69201	Mikulov
FRoSTA ČR s.r.o.	U Nikolajky 833/5	15000	Praha 5
FRUJO, a.s.	Tvrdonice 710	69153	Tvrdonice
GARPEY GROUP, s.r.o.	Ječná 3/1317	12000	Praha 2
GASTRO DELIKA spol. s r.o.	Kosmonautů 8	77200	Olomouc

GATACA,s.r.o.	Krokova 74	61500	Brno
Gateway ČR a.s.	Moravská 949	57001	Litomyšl
GIMBORN ČR, s.r.o.	Ve Žlíbku 1849	19300	Praha 9
Gornicky, s.r.o.	Harantova 1359	39701	Písek
GRONKA VS, spol. s r.o.	Na Vyhlídce č. 28	68001	Boskovice
GUSEPPE a.s.	ČSA 449	50002	Hradec Králové
Guyokrma s.r.o.	Žírovnická 2389	10600	Praha 10
HERO CZECH s.r.o.	Na Pankráci 14	14000	Praha 4
HESPO CZ s.r.o.	Rooseveltova 296	43601	Litvínov 1
HET spol. s r. o.	Ohníč 14	41765	Ohníč
HIMAREX spol. s r.o.	U Olšávky 1416	68801	Uherský Brod
Hipp Czech s.r.o.	Čerčanská 622/16	14000	Praha 4
HOSTEX spol. s r.o.	Žerotínova 63	78701	Šumperk
HSG Trade, spol. s r.o.	Slavojova 537/5	12000	Praha 2
HYDKO s.r.o.	Svésedlická 24	78353	Velká Bystřice
CHOVSERVIS a.s.	Zemědělská 897	50003	Hradec Králové
I.C.B.C. spol. s r.o.	Zámecká 30	75124	Přerov-Čekyně
I.T.A.-Intertact s.r.o.	Revoluční 24/1546	11000	Praha 10
IFAAR, spol. s.r.o.	Tobrucká 764/4	16000	Praha 6
IFC FOOD spol. s r.o.	Nad Kelerkou 33/8	19000	Praha 9
IMPULS chovatelské družstvo	Radešínská Svratka 61	59233	Radešínská Svratka
ing. Luděk Kolouch-CHRIMI	Lhotky 55	59401	Velké Meziříčí
Ing. Miloš Villín \"TRADIMEX\"	Ruzyňská 61	16200	Praha 6
INTERLACTO, spol. s r.o.	Koubkova 13/228	12000	Praha 2
INTERLOV Praha s.r.o.,závod Přerov	Osmek	75011	Přerov
INTERLOV PRAHA, s.r.o.	Jungmannova 32/25	11525	Praha 1
ITALAT CZ s.r.o.	Řeznická 20	11000	Praha 1
IVAX Pharmaceuticals s.r.o.	Ostravská 29	74770	Opava-Komárov
JAGERLAND CZ s.r.o.	Petrovice 37	37312	Borovany
Jaromír Macháček-J.A.D.	Uničovská 132	78401	Litovel
Jaromír Musil J.M.I.T.	Loučná 256	78353	Velká Bystřice
JAROMÍR STEINHAUSER s.r.o.	Mojmírovo nám. 20	61200	Brno
Jatka Zbiroh spol. s r.o.	Bezručova 347	33808	Zbiroh
Jatky Zezula-Jadrný, s.r.o		59401	Dolní Heřmanice
Jesenická obchodní společnost, s.r.o.	Nádražní 166	79070	Javorník
Jindřich Mackowski - CHOVEX	Třanovice 287	73953	Třanovice
Josef Kvapil JK ANIMALS	č.p.1261	73995	Bystřice nad Olší
JUST CS spol. s r.o.	U Továten 256/14	10200	Praha 10
K Maso spol.s r.o.	Vranov 219	66432	Vranov
K+O, s.r.o., AGRAFROST	Krásněves 1	59444	Krásněves
KARNIA s.r.o.	Ruprechtická 30	46001	Liberec 1
KM BOHEMIA s.r.o.	nám. 5. května 13	34562	Holýšov
KORAL ČR, spol. s r. o.	tř. 17. listopadu 182	53002	Pardubice
KVADRIX CZ s.r.o.	Libušina 97	77200	Olomouc.Chválkovice
LACUS CZ s.r.o..	Hynaisova 12	70900	OV-Mar.Hory
LIDRU, a. s.	Libotenice 153	41201	Litoměřice
LIGA, s.r.o.	Hlohovec 194	69143	Hlohovec
LIPRA a.s.	Libřice čp. 99	50344	Libřice
Lubomír Nohel-ERIKEL	Cihelna 147	67555	Hrotovice
MADE and TRADE, s.r.o.	Kostelecká 822	19600	Praha 9
MAKOVEC a.s.	Nám.T.G.Masaryka 201/23	79601	Prostějov
MALCHAREK & partner s	č.p.11	74727	Sepekov

MANI, spol. s r.o.	Jírovcova 18	37001	České Budějovice
MAPO Písty, s.r.o.	Písty 8	28913	Zvěřínek
MARCUS, spol. s r.o.	Ve Višňovce 17	16000	Praha 6
Martínkov, družstvo	Martínkov 136	67544	Martínkov
MASNA Studená, a.s.	Studená 480	37856	Studená
Maso Planá, a.s.	Průmyslová 499	39111	Planá nad Lužnicí
Maso Santa s. r. o.	Mistřovická 12	73562	Č. Těšín - Mistřovice
MASO SERVIS s.r.o.	Poštovní 1124	46311	Liberec 30
MASO ŽĎÁRSKO s.r.o.		59102	Světnov
MASOCENTRUM CZ s.r.o	Vendryně 2	73994	Vendryně
MASPOMA s.r.o.	Štefánikova 27	69501	Hodonín
Milan Kocourek Ing. - KATEXIM	Hruškovská 325	19800	Praha 9
MILTRA B s. r. o.	Městečko Trnávka 292	56941	Městečko Trnávka
MOBYS, s.r.o.	Oty Peška 725	27201	Kladno
MORAVA - HODONÍN spol. s r.o.	Měšťanská 80	69501	Hodonín
MSO TRADE a.s.	Národní třída 369/33	69501	Hodonín
MVDr. Vladimír Mikulica BRAMI ASTOR	Žežice 2	40011	Ústí nad Labem
NESTAR International s.r.o.	Blatenská 2148/8	14800	Praha 4
NFI Trading s.r.o.	Pavlovská 587/5	16200	Praha 6
Nordic Group Central Europe s.r.o.	Hošťálkova 8/705	16900	Praha 6
NORKAREX, spol. s r.o.	Libřice 67	50344	Libřice
Norma k.s.	Platnéřská 4	11000	Praha 1
NOSS s.r.o.	U vlečky 5	61700	Brno
NOVA COM s.r.o.	Strmá 928/5	73932	Vratimov
NYMKO s.r.o.	Poděbradská 2026	28800	Nymburk
ODBYT Poběžovice,družstvo	Vranovská 142	34522	Poběžovice
Odbytové družstvo Agroodbyt - družstvo	Mrákov 21	34501	Mrákov
Odbytové družstvo CENTRUM	Chýnovská 1917/9	39002	Tábor
Odbytové družstvo Koloveč	Tyršova 146	34543	Koloveč
Odbytové družstvo Meclov, družstvo	Meclov 72	34601	Meclov
Odbytové družstvo Radbuza	Puclice 99	34561	Puclice
Odbytové družstvo Romney	Podhradí 127	67571	Náměšť nad Oslavou
ORRERO a.s.	Tři Dvory 98	78401	Tři Dvory
OTTO MAIER spol. s r.o.	Pavlovská 587/5	16200	Praha 6
Pavel Pacan - LIMAPAS	Masarykova 650/23	46001	Liberec 1
pb trading s.r.o.	Sládkova 915	29001	Poděbrady
Pegaso,spol.s r.o.	Lidická 57	61200	Brno
PEIT Company s.r.o.	Náměstí T.G. Masaryka 6	57101	Moravská Třebová
PeMaP s.r.o.	Na Hrázi 60	75000	Přerov
PER MEAT s.r.o.	Bystřice č. 734	73995	Bystřice nad Olší
PIBM, spol. s r.o.	Kubatova 1240/6	37004	České Budějovice
Plaček s.r.o.	Revoluční 1381/III	29001	Poděbrady
PORKY NOVÝ BYDŽOV s.r.o.	Zábědov 48	50401	Nový Bydžov
PRALAC, a.s.	Radlická 608/2	15000	Praha 5
PRIMA GROUP, a.s.	1.máje 156	79826	Nezamyslice
Prime Meat,s.r.o.	Horní Vejpustek 254	67974	Olešnice na Mor.
Proagro Radešínská Svratka, a.s.	Radešínská Svratka 134	59233	Radešínská Svratka
Progress Trading spol.s r.o.	Růžová 14	74601	Opava
PROMASO spol. s r.o.	Na Rozdílu 718/28	16000	Praha 6
PROTEIN FOODS, s.r.o.	Tyršova 682	33027	Vejprnice
Přerovské jatky M.H. s.r.o.	Loukov 201	76875	Loukov
PS Group spol.s r.o.	Dolní 165/1	59101	Žďár nad Sázavou

PURUS - MEDA, s.r.o.	Palackého č. 174	61200	Brno
RAVY CZ a.s.	Norská 580/40a	46001	Liberec
REMI GROUP s.r.o.	Blazice č.p.9	76861	Blazice
ROULEX, s.r.o.	Starý Borek č. 142	73961	Třinec-Staré Město
ROVNER a.s.	Masná 9	60200	Brno
Řeznictví a uzenářství Karapetjan s.r.o.	U Muzea 399/2	46601	Jablonec n.N.
Řeznictví a uzenářství Náhlík & Náhlík	Kněždub č. 13	69664	Kněždub
Sahneböhm Praha s.r.o.	Nuselská 53	14055	Praha 4
SANSARA s.r.o.	náměstí Republiky 2600/7	78701	Šumperk
SAP Mimoň spol. s r.o.	Ralsko-Boreček	47124	Mimoň
Schubert partner a.s.	Jana Želivského 2703/2	13000	Praha 3
SPAR Česká obchodní společnost s.r.o.	Nákupní 389/1	10200	Praha 10
Statek Pohořelice,spol. s r.o.	Vídeňská 702	69123	Pohořelice
SYRMEX spol. s r.o.	Bratrská 1092	75131	Lipník a.Bečvou
TCHAS - TRADE a.s.	Sabinova 713	72100	Ostrava-Svinov
TMC Invest, a.s.	Bouřilova 1108/3	19800	Praha 9
TOMI - písek s.r.o.	Cukrovarská č.p. 34	19600	Praha 9
TOPIGS CZ s.r.o.	Svatopetrská 7	61700	Brno
TPK spol. s r.o.	Velkomoravská 2714/28	69519	Hodonín
TRADING M & K, a.s.	K Roztokům 114/13	16500	Praha 6
TRUMF INTERNATIONAL s.r.o.	Dolní Újezd 157	75123	Dolní Újezd
TWIST CZ s. r. o.	Osvobození 1329	73514	Orlová - Lutyně
UNIAL, s.r.o.	Mendíků 11	14000	Praha 4
UNO VIVA TRADING s.r.o.	K. Světlé 2238	37004	České Budějovice
VÁHALA a spol. s r.o. výroba a prodej masných a lahůdkářských výrobků	Náměstí míru 97	75366	Hustopeče nad Bečvou
VALENTA plus s.r.o.	Budějovická 638/73	14000	Praha 4 - Krč
VALSEN, s.r.o.	Nad Turbovou 30	15000	Praha 5
VAMIX Česká republika-organizační složka	Bělohorská 233/95	16900	Praha 6
VECOM Bohemia, s.r.o.	Nádražní 779	34701	Tachov
Velkoma spol. s r.o	Masarykovo nám. 1191/42	58601	Jihlava
VIA MARIS s.r.o	Mosty u Jablunkova 40	73974	Mosty u Jabl.
VICIUNAI Czech Republic, s.r.o.	Pekařská 12	15000	Praha 5
VISCOFAN CZ s.r.o.	Prumyslová 2	37021	České Budějovice
VOO BOHEMIA, s.r.o.	nám. T. G. Masaryka 588		Zlín
VorTaP s. r. o.	Blatno 185	53901	Hlinsko v Čechách
VVSA INVEST s.r.o.	Českolipská 776	27601	Mělník
VYSOČINA CATTLE s.r.o.		59101	Radostín
VYZEKO - odbyt, s.r.o.		78401	Unčovice
ZEDNÍČEK a. s.	Kunovice 1482	68604	Kunovice
Zelenka s.r.o.	Žabčice 91	66463	Žabčice
ZEM, a.s.	Zábědov 48	50401	Nový Bydžov
Zem.odbyt.centrum BOBY-FLEISCH,a.s	Dolní Brusnice 67	54472	Dolní Brusnice
Zemědělské družstvo Jiřice u Miroslavi	Jiřice u Miroslavi č. 147	67178	Jiřice u Miroslavi
Zemědělské obchodní družstvo Brniště	č.p.1	47129	Brniště
Zemědělsko obchodní družstvo Zálší	Zálší čp. 58	56501	Zálší
ZEPO Bořitov, družstvo	Bořitov č. 326	67921	Bořitov
ZERA,a.s.	Za mlýnem 1264	69602	Ratíškovice
ZERA,a.s.	Za mlýnem 1264	69602	Ratíškovice
ZŘUD-Masokombinát Polička, a.s.	Kamenec u Poličky 300	57223	Kamenec u Poličky

Part 2: The Poultry Production Chain

1) The primary production sector – present situation and future developments

1.1.) Poultry numbers

In 2004 the fall of the total numbers of poultry continued and the numbers dropped by 5.2% against 2003. The total fall of the poultry numbers was due to the fall in the numbers of laying hens since the numbers of chickens for fattening increased by 14% and the numbers of turkeys were up by 25%. An overall moderate fall in the poultry numbers was recorded even in 2005 except that the numbers of chickens for fattening increased by 1.1%.
Main commercial poultry farming and breeding areas are Southern Bohemia, Central Bohemia and Southern Moravia. Most of the commercial farms are specialised large-scale farms without land. They are private companies privatised at the beginning of the 1990-ties or they are owned by several farming cooperatives.
Domestic poultry keeping, namely of laying hens, has been fairly popular in the country but it is more a tradition and hobby rather than an economic need. While in 2004 there were 6.3 million hens in the commercial sector, in the domestic flocks there were 4.8 million with a decreasing trend.

Poultry numbers by categories in CR (in 000 birds)

Year	Breeding chickens	Fattening chickens	***Hens***	Cocks	Geese	Ducks	Turkeys	Poultry total
2001	4993	15594	6999	160	29	289	799	28865
2002	5194	16564	6838	158	28	279	887	29947
2003	5964	12422	7044	187	34	532	670	26873
2004	3663	14166	6394	142	32	258	837	25494
2005	3706	14322	5941	134	33	420	816	25372

Source: Situation and Outlook Report, Ministry of Agriculture (MoA CR)

Consumption of poultry meat increased from 13 kg in 1990 to almost 25 kg per head of population per year in 2005 and this increase was mainly due to chicken meat. This fact has had a positive effect upon the total poultry numbers in the country.

1.2.) Breeders

Commercial breeders of poultry have been almost exclusively legal entities and poultry management has become a specialised sector of farm production. Housing for laying hens or broiler fattening remained property of the transformed agricultural companies. In many instances such specialised poultry farms were independent production units already under the socialist regime and they were privatised as such, mostly to private entities represented by the original management.
Many of the capacities were built anew after 1990 and the remaining ones were reconstructed. In some cases the owners and operators of the specialised poultry fattening farms have been the firms which supply the primary sector with feedstuffs and feed components, or they deal in poultry fattening and slaughtering operations.
Housing units for laying hens have been mostly reconstructed from the period prior to 1990. These are always large capacity halls with varying levels of technical equipment. From 1990, the egg production economics allowed only for step-by-step or partial modernisation.

Poultry housing

	Poultry housing			
	Total		Of that built after 1990	
	number	Capacity	number	capacity
number	3062	36624467	854	14299527

Source: Agrocensus 2000

There are about 200 – 300 large poultry producers of broiler chickens with a capacity of 300 000 birds a year or more. The largest fattening firm is Agrodružstvo Jevišovice with some 1 million birds a year. Among the other largest producers are Hospodářské Družstvo Mělník, Jiří Šunka - Farma u Lesa, Jihočeská Drůbež – Vodňany and Jihočeská Drůbež -Týn nad Vltavou.

There are some 50 important egg producers in the country with 100 000 laying hens or more. Among the most important firms are Česká Drůbež, ZD Strakonice, Agropodnik Hodonín and Drůbežárna Holešov.

Poultrymeat production and consumption balance (in 000 t live weight)

	2000	2001	2002	2003	2004	2005
Opening stock	15,0	14,0	14,4	6,4	7,7	7,7
Production	294,0	312,5	317,0	304,0	310,0	319,0
Imports	21,6	20,4	26,0	43,5	72,4	71,7
Domestic consumption	307,0	320,0	335,0	329,0	349,5	352,7
Exports	9,6	12,5	16,0	17,2	32,9	39,7
Closing stock	14,0	14,4	6,4	7,7	7,7	6,0
Imports/Consumption (%)	7,0	6,4	7,8	13,2	20,7	20,3

Source: Situation and Outlook Report MoA CR

Egg production and consumption balance (in million eggs)

Year	Production	Self supply	Imports	Exports	Consumption
2001	3190	1658	45,8	60,6	3174,2
2002	3150	1321	64,3	140,7	3073,6
2003	2626	982	117,0	143,0	2600,0
2004	2423	944	290,4	175,6	2537,8
2005	2210	900	492,0	258,0	2444,0

Source: Situation and Outlook Report MoA CR

1.3.) Genetics and breeding

Genetics of poultry and its improvement are not organised on the level of an association and they are entirely a private business activity. In the Czech Republic, poultry productivity tests are carried out by International Poultry Testing Station Ústrašice (in Southern Bohemia, abbreviation MTD). However, nowadays any commercial breeding company from EU can export poultry types and breeds to CR.

Survey of improvement and (grand)parental breeding flocks of fowls in the Czech Republic.

Breed improvement flocks – grand parents stock farms

Poultry type	2004	
Laying hens	62051802	AVIGEN Žabčice, Ltd., farm Bantice
	61033249	ZD DOLNÍ CERKEV, cooperative
	61079687	LÍHEŇ STUDENEC, Ltd., hospodářství Vaneč
Ducks	31079459	RYBÁŘSTVÍ Tábor, a. s.
	62051936	RYBÁŘSTVÍ Velké Meziříčí, Co., farm M. Krumlov
Geese	31032379	RYBÁŘSTVÍ NOVÉ HRADY, Ltd.

(Grand)parental progeny flocks of poultry

Poultry type	2004	
Laying hens	62051778	INTEGRA Žabčice, s. r. o., farm Žabčice
	61033249	ZD DOLNÍ CERKEV, cooperative
	61079687	LÍHEŇ STUDENEC, s. r. o., farm Vaneč
Meat hens	52063501	XAVEROSS, s. r. o. – farm Police nad Metují
	21055508	- farm Mcely
	21055496	- farm Nehvizdy
	52063488	- farm Teplice nad Metují
	52063499	- farm Dolní Přím
Ducks	31079459	RYBÁŘSTVÍ Tábor, a. s.
	62051936	RYBÁŘSTVÍ Velké Meziříčí, a. s., farm M. Krumlov
Geese	31032379	RYBÁŘSTVÍ NOVÉ HRADY, s. r. o.

Laying results of parental forms of meat-type hens in 2004 in MTD Ústrašice

Combination	Fertility rate	Hatch rate from eggs laid	Egg yields 40 weeks/ commencement number	Number of chicks hatched / commencement	Feed consumption	Loss in yield	IER
	%	%	pcs	pcs	g / 1 egg	%	
ISA 30	91,7	83,2	178,2	128,7	282,0	1,0	481,6
COBB 500	95,1	83,2	170,6	130,6	282,5	0,5	523,8
ISA EXP. 4	92,6	84,5	181,3	132,6	285,4	2,0	469,2
ISA JV	92,0	84,3	184,4	133,8	230,5	3,0	585,6
ARBOR ACRES	92,0	85,4	175,9	134,0	288,8	3,0	493,4
ROSS 308 USA	90,8	81,9	179,7	130,7	286,7	1,0	502,8
ISA EXP. 3	91,0	82,1	183,1	134,5	281,7	4,5	500,5
COBB 500 FF	95,0	86,2	175,9	140,8	269,0	0,5	583,4
ROSS 308 CZ	93,4	85,2	182,2	140,1	277,7	1,5	533,9

IER: index of laying hens efficiency on parental level

Laying-type hens egg production result in 2004 in MTD Ústrašice

Combination	Egg production in 392 days / commencement number	Egg mass productio	Average egg weight	Mortality	Feed consumption			IEN
					Per 1 egg	Per 1 kg egg mass	Per 1 feed day	
	ks		g	%	g	Kg	g	
BOVANS GOLDLINE	331,2	21,1	63,5	5,1	138,7	2,2	119,2	9,6
LOHMANN BROWN	325,7	21,1	64,8	5,6	140,5	2,2	119,2	9,6
H+H BROWN NICK	333,8	21,0	63,0	4,2	137,7	2,2	119,0	9,6
TETRA	306,8	18,9	61,6	5,1	149,7	2,4	119,4	7,9
SHAVER 579	329,1	20,8	63,3	7,9	139,7	2,2	119,1	9,5
HISEX HNĚDÝ	338,4	21,2	62,5	2,8	135,8	2,2	118,1	9,6
ISA BROWN	323,2	20,5	63,6	4,2	142,2	2,2	119,0	9,3
MORAVIA SSL	314,5	19,2	60,9	6,9	146,2	2,4	121,0	8,0
HNĚDÝ D 102	304,3	19,1	62,7	4,2	151,1	2,4	118,8	8,0
ŽÍHANÝ D 959	314,6	19,5	61,9	4,2	145,3	2,4	118,0	8,1
HNĚDÝ D 853	302,3	18,5	61,1	1,4	152,2	2,5	117,8	7,4

IEN: index of laying hens efficiency

Yield results of laying-hen type – deep bedding in 2004 in MTD Ústrašice

Combination	Egg yield for 392 days at commencemt number	Egg mass productio	Average egg weight	Mortality	Feed consumption			IEN
					per 1 egg	per 1 kg egg mass	per 1 feed day	
	Ks	Kg	G	%	G	Kg	g	
HY-LINE BROWN	307,5	19,9	64,8	13,8	163,1	2,5	133,2	8,0
TETRA SL	295,7	19,3	65,1	18,1	170,5	2,6	135,3	7,4
ISA EXPERIMENTAL	308,0	19,7	63,9	5,0	162,4	2,5	128,7	7,9
BOVANS GOLDLINE	312,1	20,2	64,7	8,1	163,3	2,5	133,4	8,1
LOHMANN TRADITION	316,0	21,8	69,0	14,4	158,0	2,3	130,6	9,5
LOHMANN SILVER	324,3	20,0	61,7	3,8	155,1	2,5	160,5	8,0
MORAVIA BSL	268,1	16,2	60,4	5,0	188,1	3,1	130,4	5,2
MORAVIA SSL – A	279,0	17,3	62,0	15,0	178,1	2,9	135,9	6,0
MORAVIA SSL – B	274,9	17,4	63,2	10,0	181,5	2,9	132,5	6,0

Chicken fattening tests results in 2004 in MTD Ústrašice

Combination	Number of tests	Fertility rate	Hatch rate from eggs laid	Live weight at 35 days	Feed consumption	Mortality	Slaughter yield	Share of breast muscle	IEV
		%	%	%	%	%	%	%	
ISA 30	4	91,5	83,2	1870,7	1786,9	3,6	73,8	19,9	288
COBB 500	8	95,5	86,1	1923,6	1738,2	4,0	74,7	20,6	304
ISA EXP. 4	4	92,6	84,5	1733,9	1729,2	2,8	73,5	20,2	278
ISA JV	4	92,0	84,3	1750,9	1751,1	2,2	73,4	18,8	280
ARBOR ACRES	4	92,0	85,4	1913,9	1793,2	2,0	74,3	20,7	299
ROSS 308 USA	4	90,8	81,9	2000,2	1800,0	2,6	74,1	20,6	309
ISA EXP. 3	4	91,0	82,1	1860,6	1770,9	3,4	74,4	20,5	290
COBB 500 FF	5	93,4	84,8	1947,8	1738,3	3,2	74,2	20,4	310
ROSS 308 CZ	16	92,9	84,9	1823,2	1761,3	1,5	74,4	20,7	291
JA 457	2	98,4	93,2	1930,3	2887,4	1,2	73,7	23,3	118

IEV: index of fattening efficiency

1.4.) Poultry management economics

Economics of poultry and particularly of egg production was affected by the entry of CR into the EU and by the lifted protection of the domestic market together with parallel incompetence of domestic producers and traders to sell on other EU markets.

Egg production economics in CR

	Unit	2003	2004	yr/yr index
Production costs	CZK/egg	1,42	1,70	119,72
Farmers prices in CR	CZK/egg	1,76	1,80	102,27
Farmers prices in EU	CZK/egg	1,99	1,61	80,90

Source: 2004 State of Agriculture General Report

Poultry meat production economics in CR

	Unit	2003	2004	yr/yr index
Production costs	CZK/bird	20,68	21,93	106,04
Slaughter chick quality class I price in CR	CZK/bird	21,03	22,11	105,14
Slaughter chick qualityclass I price in EU	CZK/bird	24,52	24,5	100,20

Source: 2004 State of Agriculture General Report

Poultrymeat farmers prices (CZK/kg live weight)

Year	Slaughter chick quality class I	Slaughter hens	Broiler turkey (hens) quality class I
1995	22,88	11,83	35,06
1996	23,64	6,84	34,02
1997	26,93	6,95	37,68
1998	27,58	8,78	38,31
1999	22,34	5,21	35,03
2000	21,81	3,77	33,81
2001	25,82	4,52	35,84
2002	21,95	3,91	31,16
2003	21,03	1,06	31,62
2004	22,11	1,50	31,68
2005∗	21,28	4,17	29,94

Source: Situation and Outlook Report MoA CR
∗ average from January through October 2005

The year 2005 has seen a further increase of domestic poultrymeat production by 3%

Egg producers pricess, assorted consumer eggs (CZK/egg)

Year	1993	1997	2000	2001	2002	2003	2004	2005∗
Average price	1,44	1,91	1,97	1,92	1,58	1,76	1,80	1,46

∗ average from January through October 2005
Source: Situation and Outlook Report MoA CR

Poultry meat costs structure

Costs structure	Unit	Costs of legal entities in 2003	Cost of all farms in 2004
Feeds, bedding - purchased	CZK/1000 FD	569	649
Feeds bedding on-farm	CZK/1000 FD	7	14
Medicaments and desinfection	CZK/1000 FD	11	9
Other direct material	CZK/1000 FD	36	34
Total Direct material costs	CZK/***1000 FD***	***623***	***706***
Other direct costs & services	CZK/1000 FD	50	67
Labour costs total	CZK/1000 FD	46	62
Investments depreciation	CZK/1000 FD	27	9
Animal depreciation	CZK/1000 FD	0	0
Subsidiary activities	CZK/1000 FD	10	15
Overhead costs	CZK/1000 FD	28	25
Total costs	CZK/**1000 FD**	**785**	**884**
Manure	CZK/1000 FD	3	3
Costs of main product	CZK/1000 FD	782	881
Yield	kg/1000 FD	45,69	48,11
Costs per gain weight	CZK/1 kg	17,11	18,31
Costs per live weight	CZK/1 kg	20,68	21,88

Source: Investigation into company costs efficiency, RIAE, Praha

Within the costs of production feed costs play an important role. Most of the farmers buy complete feed mixtures from the leading producers Agropol and Agrofert group. However, some of them invested into own feed mixing technology and they produce their own feed and buy only mineral, vitamines and veterinary components in order to decrease the costs.

Eggs production costs structure

Costs structure	Unit	Costs of legal entities in 2003
Feeds, bedding - purchased	CZK/1000 FD	545
Feeds bedding on-farm	CZK/1000 FD	3
Medicaments and desinfection	CZK/1000 FD	1
Other direct material	CZK/1000 FD	143
Total Direct material costs	CZK***/1000 FD***	***693***
Other direct costs & services	CZK/1000 FD	100
Labour costs total	CZK/1000 FD	64
Investments depreciation	CZK/1000 FD	87
Animal depreciation	CZK/1000 FD	46
Subsidiary activities	CZK/1000 FD	22
Overhead costs	CZK/1000 FD	23
Total costs	CZK**/1000 FD**	**1 036**
Chlévská mrva	CZK/1000 FD	0
Náklady hlavního výrobku	CZK/1000 FD	1 036
Yield[1)]	kg/1000 FD	840
Costs per one egg	CZK/1 kg	1,23
Costs per one egg, incl. depreciation	CZK/1 kg	1,42

1) Average number of eggs per year is 307 in 2003 and 269 in 2004.

In the Czech Republic there is a National cooperative of poultry meat farmers, which aim is helping the farmers to sell providing lobbying as well and dealing with supermarkets chains.

1.5.) Future developments

Poultrymeat production can be considered as a prospective and competitive industry in the Czech Republic. Consumer demand has been stabilised and the producers keep investing into their plants. Most of the poultry plants have been modernised during 1990s, or quite new fattening plants have been built, and the trend has continued. Demand for poultrymeat has been growing constantly and its consumption almost doubled during the decade from 1990. The domestic market protection prior to the EU accession was preventing excessive imports and the producers prices for fattened broilers have never fallen below the production costs since 1990. This has not been the case with any other commodity. Such situation was favourable for the producers and they could repay their investment loans thereby providing competitiveness for their businesses. The most recent investors into the broiler fattening sector have been the poultrymeat processors who want to maintain the stability of the supplies as well as be less dependent upon the supplies with fluctuating prices. Among the investors one can also find the important imputs suppliers, and such a trend can be expected also in the future. Because poultry farming is not really labour intensive and is highly computerised nowadays, new investments can be expected to be large scale and technology intensive.
Chicken fattening is an industrial and automated industry with good profitability.

The laying hen breeders are in a more complicated position. Egg consumption has been diminishing thereby making the entire sector stagnant for a long time. After the EU accession the Czech market was flooded with very cheap eggs from the neighbouring countries, namely from Poland. Several traditional egg plants have gone out of business, and modernisation together with the compulsory animal welfare measures meant investments and complications.

2) The slaughter/processing sector: present situation and future developments

2.1.) Core information

In 2004 the sales of poultry increased by 2% yr/yr. Of the total volume of poultry purchased by the slaughterhouses the share of chickens reached 89%. In 2005 the purchase of poultry was up 4%, with chickens up 7%, over the first three quarters of the year. This as a result of the ability of the sector to satisfy the domestic demand and due to the growing skills to export to the EU markets.

Poultry purchase by processing industry total (in tonnes live weight)

Year	1993	1997	2000	2001	2002	2003	2004	2005∗
Total	124446	164143	264954	277028	296567	284008	289715	292612

∗ qualified estimate for the last quarter of the year
Source: Situation and Outlook Report, MoA CR

Chicken purchase (in tonnes live weight)

Year	1993	1997	2000	2001	2002	2003	2004	2005∗
Total	98307	139615	230597	239715	257731	245596	257779	280979

∗ qualified estimate for the last quarter of the year
Source: Situation and Outlook Report MoA CR

Purchase of geese, ducks and turkeys for processing industry (in tonnes live weight)

Year	1993	1997	2000	2001	2002	2003	2004
Geese	846	331	539	271	189	187	543
Ducks	6494	4220	4938	4583	5340	5828	-
Turkeys	6120	10522	22647	24972	23517	22020	21612

Source: Situation and Outlook Report MoA CR

Poultry slaughterhouse prices and selected poultrymeat products (CZK/kg)

Year	Chicken chops	Chicken (upper)legs on bone	Chickens mechanically separated meat
1997	124,62	62,91	-
2000	122,35	53,54	-
2001	128,38	60,47	-
2002	101,60	49,65	-
2003	103,41	46,36	15,97
2004	104,42	46,61	15,70
2005	106,34	47,78	17,82

Source: Situation and Outlook Report MoA CR

2.2.) Poultry slaughter facilities

During the socialist era the Xaverov Company, established early 1960s, had an exceptional and dominant position as a cornerstone of the country´s poultry sector. Xaverov Co. had its reproduction and breeding flocks of hens and broilers including a slaughter house. By 1990 the Czech Republic had 15 slaughter houses for chickens, hens, ducks, turkeys and geese.

Their capacity was 50 – 70 000 birds per workshift. The privatisation was done mainly through the voucher (public coupon) system on the beginning of 90th.

2.3.) Ownership structure of main processing capacities

Xaverov
The joint-stock company Xaverov a.s. consists of a single capital group (family holding) for poultry fattening and slaughtering and Boneco which is specialised in egg processing. The Meat Combine Klatovy with red meat production also belongs to this holding.

Agropol Group
This is an important company specialising in the purchase of farm commodities and in input supplies into agriculture. It also owns poultry processing capacities Jihočeská Drůbež Klatovy (firms at Vodnany and Mirovice). Water fowls are processed at Mirovice. The largest poultry slaughter plant in the Czech Republic is at Vodnany with 200 000 birds daily capacity. This group also includes Promt in Brno and Intergal Vrchovina with their poultry slaughterhouses and poultry processing plants.

Agrofert Holding
The company built newly a poultry slaughtering plant within the firm Kostelecke Uzeniny, branch Hodonin. The holding is an important player in agribusiness owning a chain of about 30 grain stocks, producing feed for pig and poultry sector, owning several poultry production units specialising in meat production. The company strategy is to cover the whole vertical line.

Other important processors are Ktůta, Integral, Žamberk, Modřice and České Budějovice.

2.4.) Outlook

Poultrymeat consumption rocketed up in early 1990s and if any further increase can be expected it will only be slight. Pork meat has a strong tradition in the Czech Republic and the consumption of good quality beef will be stable or even slightly increase. Poultry processing capacities in the country are sufficient and a slight decrease of their number can be expected together with an increase of the productivity and output of the existing plants. Following the qualified estimate of Mr Jan Katina, director of the Czech Meat Processors Association, the current slaughtering and processing capacities of the whole poultry processing industry are nowadays used in average by 80 to 85%.
Water fowl production and processing is expected to go down as the Czech Republic is less competitive in this sector. With the increasing purchasing power of the population a shift from chicken meat to the better quality turkey is anticipated.

3) Consumption: present situation and future developments

3.1) Present situation

Poultrymeat consumption in 2004 for the first time exceeded 25 kg/per capita/per year while in 1990 it was a mere 13 kg. The current consumption is even above that in the EU where the average has been some 23 kg/yr.
Poultrymeat liking is considered as stabilised and only a slight increase can be expected. There may be fluctuations in the years to come in the consumption of chicken meat and turkey, the latter being more expensive, but with the growing purchasing power of the population the turkey consumption is likely to rise.

From the consumer viewpoint, there is a growing demand for portioned meat and for poultrymeat semi products. Portioned poultry sales in 2004 grew by 3.9% and in 2005 by 4% yr/yr. Consumers increasingly demand only selected meat parts. Gradually the sales of semi-products have been increasing, from more than 8000 t in 1999 to more than 12 000 t in 2004. The sales of poultry giblets and of meat products decreased slightly and their production ranged between at just below 8000 t and 30 000 t respectively.
Demand for poultrymeat semi products has been increasing while that of giblets has been slightly decreasing. This is a result of the increasing trend to spend less time cooking.

Sales of poultry products (tonnes)

Product	1999	2000	2001	2002	2003	2004	2005
Portioned poultry	47711	55094	61243	64486	64570	67146	70260
Poultry giblets	6814	8415	8874	8992	8508	7809	8484
Semi-products	8069	8656	9139	11247	12014	12604	9830
Meat products	29799	33331	35161	33728	32239	29155	28550
Tinned meat	2227	4704	3323	4391	4737	-	-

Source: Situation and Outlook Report, MoA CR

Per capita egg consumption (eggs/year)

Year	2003	2004	2005
Consumption	255	247	236

Source: Situation and Outlook Report, MoA CR

Per capita egg consumption has been falling each year. The main reasons are changing health criteria whereby eggs are considered as an important source of harmful cholesterol.

Consumer prices of assorted eggs (CZK/kg)

Year	1993	1997	2000	2001	2002	2003	2004	2005*
Price	1,95	2,77	2,75	2,77	2,39	2,44	2,76	2,33

Source: Situation and Outlook Report MoA CR
* average for January through October 2005

3.2.) Future developments

Chicken meat consumption in the Czech Republic can even increase in the long run and definitely can be considered as stabilised at the present level. A slight increase can be expected in the future with increasing purchasing power in the Czech Republic. Chicken meat

is considered as healthy meat which should be consumed more regularly than pork or beef meat.

4) Foreign trade: present situation and future developments

Poultry trading increased immediately after the country´s accession to EU. Imports increased by 64% already in 2004 having reached 54 900 t for the whole year. But the exports rocketed by 91% although total exports were less than a half of the imports.
After the CR entry into the EU a total of 35 600 tonnes of poultrymeat were imported from May 2004 until the end of the year which was more than the previous 2003 year´s total.
Data for 2005 had not been completed at the time of writing this study but the data available indicated that the 2005 imports were expected on the 2004 levels while the exports were predicted at 20% up. This trend is a proof of the competitiveness of Czech chicken fatteners.
The processed poultry and poultrymeat, however, have not been sold abroad well enough.
Among the major exporters to the Czech Republic have been Brasil, Slovakia, Germany, The Netherlands, Hungary and Poland. Most of the Czech poultry exports go to Slovakia, Germany, The Netherlands and Hungary.

Poultrymeat imports (tonnes)

Year	2000	2001	2002	2003	2004	2005∗
Total	16253	15600	19970	32609	54876	38711
Price CZK/kg	50,81	60,67	54,74	42,92	43,89	47,48

Source: Situation and Outlook Report MoA CR
∗ Average for January through September 2005

Poultrymeat exports (tonnes)

Year	2000	2001	2002	2003	2004	2005∗
Total	7497	9264	11984	12876	25040	22311
Price CZK/kg	74,15	75,49	52,56	54,94	57,66	48,12

Source: Situation and Outlook Report MoA CR
∗ Average for January through September 2005

Poultrymeat foreign trade balance (million CZK)

Year	Imports	Exports	Balance
2000	826	555	- 271
2001	947	699	- 248
2002	1093	630	- 463
2003	1400	707	- 693
2004	2341	1411	- 930
2005	1838	1074	- 764

Source: Customs Statistics

Countries with major share of poultrymeat imports into the CR

Year	Country	ton	Country	Ton	Country	ton	Country	ton	Country	ton
2004	Brasil	20368	Hungary	6259	Netherlands	5231	Slovakia	4272	Italy	2801
2005∗	Brasil	7174	Poland	6171	Netherlands	4743	Slovakia	4642	Hungary	2588

Source: Customs Statistics
∗ January through September 2005

Countries with major share of Czech poultrymeat exports

Year	Country	ton	Country	Ton	Country	ton	Country	ton	Country	ton
2004	Slovakia	9291	Germany	7166	Netherlands	3959	Belgium	1429	Poland	777
2005∗	Slovakia	11065	Germany	4705	Netherlands	2225	Hungary	2135	Austria	625

Source: Customs Statistics

∗ January through September 2005

Imports of consumer eggs and egg melanges

Year	2000	2001	2002	2003	2004	2005∗
Total (tons)	3288	2175	1395	3266	11254	14626
Price CZK/kg	25,31	25,04	20,57	26,09	20,84	15,99

Source: Situation and Outlook Report MoA CR

∗ Average January through September 2005

Exports of consumer eggs

Year	2000	2001	2002	2003	2004	2005∗
Total (tons)	3033	3127	6032	5741	8853	8473
Price CZK/kg	24,15	24,04	19,58	23,84	17,29	10,94

Source: Situation and Outlook Report MoA CR

∗ Average January through September 2005

Consumer eggs foreign trade balance (million CZK)

Year	Imports	Exports	Balance
2000	83	74	- 9
2001	54	75	21
2002	29	118	89
2003	85	137	52
2004	233	155	- 78
2005	234	93	- 141

Source: Customs Statistics

Countries with major share of consumer eggs exports to the CR

Year	Country	ton	Country	ton	Country	ton	Country	ton	country	ton
2004	Poland	4455	Slovakia	2225	Germany	1810	Lithuania	967	Belarus	495
2005∗	Poland	4115	Germany	3547	Lithuania	3320	Slovakia	1606	Spain	928

Source: Customs Statistics

∗ January through September 2005

Countries with major share of consumer eggs exports from CR

Year	Country	ton	Country	ton	Country	ton	Country	ton	Country	ton
2004	Germany	2213	Swiss	1470	Slovakia	972	Belgium	699	Austria	565
2005∗	Germany	3494	Slovakia	2965	Switzerland	1011	Belgium	323	Poland	239

Source: Customs Statistics

∗ January through September 2005

An identical balance in foreign trade also holds for egg mass.

Foreign trade with breeding material

Import of hatching eggs in 2004

Country	Ton	CZK/kg
Canada	2	313,54
Germany	2	192,71
Hungary	1	784,34
Poland	10	37,47
Slovakia	141	61,86
Total import	**156**	**67,5**

Export of hatching eggs in 2004

Country	Ton	CZK/kg
Austria	418	66,98
Germany	44	72,81
Spain	16	57,51
Croatia	333	72,56
Hungary	403	83,00
Ireland	29	70,65
Italy	13	153,84
Libya	3	273,67
Nigeria	1	39,16
Netherlands	24	69,14
Poland	472	69,38
Portugal	81	59,68
Rumania	481	65,85
Saudi Arabia	12	70,36
Slovakia	88	74,09
Ukraine	12	65,11
Total export	**2 430**	**72,43**

Foreign trade with breeding material and breeding poultry has been growing and changing. Imports of laying pullets (laying hen chickens) have been growing. Total domestic production has dropped in recent years and, on the contrary, pullet exports into the formerly socialist countries have been thriving. With fattening chicks there has been a favourable trend for the domestic breeders with gradually growing exports.

Hatching, imports and exports of day-old and young poultry for 1999 - 2004

Poultry type		1999	2000	2001	2002	2003	2004
Laying-type chicks (pullets)	Hatched	7 830 577	9 318 066	10 370 897	9 096 905	8 182 216	7 730 931
	Imports	1 311 720	1 578 168	1 827 375	2 061 060	2 193 813	3 662 104
	Exports	538 262	455 124	1 312 365	1 859 196	1 956 063	2 011 082
	Total	**8 604 035**	**10 441 110**	**10 885 907**	**9 298 769**	**8 419 966**	**9 381 953**
Fattening chicks	Hatched	161 495 030	175 816 624	196 379 765	187 614 434	185 273 795	191 910 204
	Imports	-	118 300	-	497 500	-	-
	Exports	21 190 484	29 121 508	40 234 989	34 130 985	39 090 556	48 727 726
	Total	**140 304 546**	**146 813 416**	**165 144 776**	**153 980 494**	**146 183 239**	**143 182 478**
Turkey (hens)	Hatched	2 048 600	2 398 300	2 780 380	2 490 125	1 770 208	1 680 039
	Imports	702 150	1 040 743	1 091 437	1 014 935	988 311	1 238 130
	Exports	49 600	25 480	10 000	77 534	-	15 520
	Total	**2 701 150**	**3 413 563**	**3 861 817**	**3 427 526**	**2 758 519**	**2 902 649**
Ducks	Hatched	4 644 960	5 484 663	5 342 344	4 995 292	5 265 736	4 285 990
	Imports	11 000	19 500	22 140	-	-	-
	Exports	2 020 624	2 155 867	2 440 664	2 994 735	2 041 671	1 920 935
	Total	**2 635 336**	**3 278 296**	**2 923 820**	**2 000 577**	**3 224 065**	**2 365 055**
Geese	Hatched	498 580	488 306	454 919	340 277	322 064	350 282
	Imports	-	-	-	-	-	-
	Exports	85 561	69 731	119 238	87 088	64 985	136 742
	Total	**413 019**	**418 575**	**335 681**	**253 189**	**257 079**	**213 540**

5) distribution and retail: present situation and future developments

Core information is given in the part on the pork production chain.
Retail chains have been purchasing poultry and eggs by one main single criterion – the lowest price. Foreign imported eggs are frequently on offer in the supermarkets as foreign eggs are offered at very low prices, their shelf life being fairly long, and the customer cannot or does not want to buy by the country of origin. It is a result of lower Czech competitiveness in egg production. This gives foreign producers a good chance to put their products on the Czech market. Czech customer´s behaviour is not based on national feelings to prefer and to support local Czech food and products.
In poultrymeat the domestic producers are quite competitive and the sales of poultry meat are dominated by domestic producers. Total poultry production in the Czech Republic is about 320000 tons and net import (import minus export) is about 31000 tons. It means that the domestic retail market is supplied for more than 90 % by domestic producers.

6) The supply sector: present situation and future developments

6.1.) Genetics

Fattening broilers are mainly the Ross 308 hybrid genotype. One-day chicks are put out by Xavergen Joint Stock Co, a company producing laying hens chicken (Hisex Brown a Bovans Nera) as well. This hybrid is a product of many years of domestic improvement and it prevails in the fattening of chickens: its share in fattening reaches almost 67%.
The second most wide-spread hybrid is Cobb 500 of American origin whose share in fattening has been 31%. This hybrid has proved to be very good at fattening. It has been improved into higher weight categories having high growth capacity and muscle yield. Compared with Ross, its weight gains are 15 g higher at a same period of fattening. Ross 308, however, has been better in the fattening economics criteria, with better feed conversion ratio which was around 1.70 to 2.0 kg of compound feed per kilo of weight gain at 39 fattening days. Also its mortality has been low at below 3%. Fattening the American hybrids is often discouraging for more frequent health problems, showing broken tendons on the legs at three weeks of fattening. Their frequent low mobility as a result of callosity and stick-ons is reflected in the lower price paid by slaughter houses.
The remaining 2% are taken by the hybrids Hybro PN and JA 457.

Numbers and share of poultry meat breeds in parental flocks

Hybrid	Fathers	Mothers	Total	
			birds	%
ROSS 308	133553	1325295	1458848	66,40
Cobb 500	57687	615603	673290	30,70
Hybro PN	4811	51395	56206	2,56
JA 457	359	3917	4276	0,19

There are more laying breeds of poultry on the market in comparison to broiler chicken breeds. And the breeding material and one-day chicks of laying breeds for breeding and farming are imported in much larger volumes (last table in the chapter on foreign trade). The hybrid ISA Brown has been prevailing, together with products of domestic improvement though crossing with foreign breeds, such as Hisex Brown and Dominant.

Numbers and share of poultry layer breeds in parental flocks

Hybrid	Fathers	Mothers	Total	
			birds	%
ISA Brown	2310	61120	63430	34,80
Hisex brown	4325	45184	49509	27,20
Dominant CZ	1000	16392	17392	9,60
Morávia BSL	1300	13200	14500	8,00
Tetra	1508	10064	11572	6,40
Bovan Goldline	1011	10180	11191	6,10
Shaver brown	818	8655	9473	5,20
Horal	200	2350	2550	1,40
Bovans nera	255	2128	2383	1,30

Survey of improvement and progeny (grand) parental breeds of fowls in the Czech Republic:

Poultry improvement flocks

Poultry type	2004
Laying hens	AVIGEN Žabčice, s. r. o., farm Bantice
	ZD DOLNÍ CERKEV, cooperative
	LÍHEŇ STUDENEC, s. r. o., farm Vaneč
Ducks	RYBÁŘSTVÍ Tábor, a. s.
	RYBÁŘSTVÍ Velké Meziříčí, a. s., farm M. Krumlov
Geese	RYBÁŘSTVÍ NOVÉ HRADY, s. r. o.

Poultry progeny (grand)parental flocks

Poultry type	2004
Laying hens	INTEGRA Žabčice, s. r. o., farm Žabčice
	ZD DOLNÍ CERKEV, cooperative
	LÍHEŇ STUDENEC, s. r. o., farm Vaneč
Meat hens	XAVEROSS, s. r. o. – farm Police nad Metují
	- farm Mcely
	- farm Nehvizdy
	- farm Teplice nad Metují
	- farm Dolní Přím
Ducks	RYBÁŘSTVÍ Tábor, a. s.
	RYBÁŘSTVÍ Velké Meziříčí, a. s., farm M. Krumlov
Geese	31032379 RYBÁŘSTVÍ NOVÉ HRADY, s. r. o.

The company Xavergen is a hatchery and the biggest in total production of one-day chicks for further farming. Hatchery Mach is the most important producer of fattening chicks Ross and Cobb.

6.2.) Poultry housing and housing equipment

There is a fairly big competition on the housing technologies´ suppliers market and besides the traditional domestic suppliers the most important firms of Europe and worldwide are present on the Czech market.

All companies are Czech companies. Some of them are producers of Czech origin, like Age, STS Hostivice and Zeman – OTS. The others are representatives of foreign companies/technologies on the Czech market. Information on market shares are not available.

6.3.) Poultry nutrition

The largest companies specialised in laying hens or in poultry fattening produce and mix their feed compounds independently. They only purchase vitamins, mineral and other food complements from domectic producers or importers.

6.4.) Veterinary medicines

The Institute for the State Control of Veterinary Biologicals and Medicaments in Brno (www.uskvbl.cz) is the state professional body which cares for registration, controls manufacturing, storage and distribution and performs field trials of veterinary medicines. The system and legislation for veterinary inspection have always been on a good level in the Czech Republic and is now fully harmonised with EU. The State Veterinary Administration is the supreme body controlling the animal diseases.

7) Foreign investment

As far as known there are no foreign investments in the sector of poultry breeding or fattening The poultry processing industry too seems to be free of foreign investments and it is run by very strong companies.
Foreign investments can be foreseen, but most probably a wise investor would not limit its entry in just a part of the chain which would then let him be dependent on down and upstream sub-sectors. To cover the whole chain would require an important investment and such a decision has not yet been materialized.
Poultry meat production was always relatively good business for Czech farmers. It resulted in perspective investments pro best and good farmers in CZ into industry. However, not so successful farmers could be interested in joint-ventures with foreign investors mainly in egg's production sector.

8) The institutional sector

The information on the institutional coverage is given in the pig production chain study.

Specific for the poultry chain are the following NGOs:

- **Czech-Moravian Poultry Farmers Union** www.unie.wz.cz is associating the poultry farmers, primary producers;
- **Poultry Producers Association** (E-mail:sdruzeni.dp@volny.cz) **,** Member of the Food Chamber (Federation of Food and Drink Industries).

9) SWOT ANALYSIS

It should be noticed that the SWOT analysis is made from the ***Czech perspective.***

Strengths

- University-graduated management on farms and enterprises
- Large capacity housing of poultry
- General awareness of the necessity of higher animal concentrations and introduction of most modern technologies
- existence of relatively larges companies and possibility of bigger investment
- relatively cheaper labour force
- poultry meat consumption is very stabilised with slight increase expectation
- presence of the most developed technologies

Weaknesses

- technological backwardness in some instances, often with just the inevitable modernisation and adaptation to EU requirements
- less sales through marketing organisations
- less productive processing industry, its indebtedness, very low ability to export to foreign markets in spite of competitive prices and corresponding quality
- falling consumption of eggs and general awareness that eggs are not healthy and that eggs are the main source of cholesterol

Opportunities

- potential use of the existing large-capacity halls, or even re-introduction of production in facilities which were temporarily emptied due to unfavourable prices on the market. Production of both poultrymeat and eggs could be increased quickly by 10 – 20%.
- trading contacts in post-communist countries
- prices of poultry meat produced in CR have been very competitive

Threats

- cheap imports of meat and eggs from third countries
- fears within the agri-food sectors that foreign retail chains will prefer in their sales and promotion, out of principle, the products from their home countries at the moment when domestic products have lost their price advantage

10) Possibilities for Dutch agribusiness for trade and investment

The first opportunity is the use of the inexpensive production of Czech poultry meat for sale on the EU markets. Poultry meat prices are quite lower in comparison to EU level which is chance for traders.
Poultrymeat production is a fairly lucrative industry of domestic agriculture. Joint investments into poultry fattening could be considered. Egg´ producers having troubles with efficiency could be even more open to joint ventures or cooperations.
In the egg sector in the Czech Republic there are fairly large capacities which might be available for sale to a foreign investor. Such are large capacity halls where the technical equipment has been put idle temporarily. This area would certainly be open to cooperation and to investments which could bring potential increase in production, but mainly in the marketing of eggs on foreign markets.
There has been a stagnation in the Czech Republic in the supply of hybrids for fattening, and the producers might be interested to try breeding new hybrids of poultry.
The Czech industry can offer production of livestock equipment and technology as brand named products.
It has to be noted that there are at least two strong groups (Agropol and Agrofert) who act as vertical integrations in the whole agricultural sector but especially in the poultry production and processing. Their production potential is high and they would most probably act as quite tough competitors against newcomers who could potentially endanger their production and market division and thus dominance.

Annex 1. Description of selected farms

Klatovy Poultry Enterprise

The Klatovy Poultry Enterprise (DZ Klatovy) opened in mid 2005 a new broiler fattening capacity at Horšov, Domažlice. The investment worth CZK 14 million has a capacity for 50 000 broilers. Chickens will be dispatched from the plant seven-times a year, informed Drahomír Kočí, director of DZ Klatovy, at the opening event.
DZ Klatovy is the second largest poultry enterprise in CR having already two older facilities with a capacity for 40 000 chicks. The company is mainly processor of poultry meat and now its current self-sufficiency in live chicken supply is 10%. The plan is to open two more fattening facilities at Horšow with a capacity of 50 000 birds each, thereby increasing the enterprise´s own production of slaughtered chicks to 15%. DZ Klatovy will thus become its second largest own supplier of chickens for fattening, after Lubska Zemedelska.
All the three existing houses will employ five workers. The firm has been responding to the ever growing demand for chicken meat, director Kočí said. The increased capacities of the company´s itself can eliminate the constantly growing imports.
DZ Klatovy invested in 2005 another CZK 40 million into a packaging and weighing line at Klatovy. In 2004, DZ Klatovy sold products for CZK 925 million, roughly 55 million more than in 2003. Net profit was up by a third yr/yr, and reached CZK 21 million.

Jihočeská drůbež Vodňany (South Bohemian Poultry Vodňany)

Company director is ing. Martin Šácha. The company is the largest poultry slaughter capacity aiming also at the stabilisation of its own breeding stock. Thanks to its membership of the Agropol Group which owns fattening facilities the company´s own slaughter capacity is 65% self sufficient.

Czech Turkey

Czech Turkey was purchased from the Agrofert Group at the end of 2004 by Agrokrocan, a turkey breeders´ cooperative. The company controls some 60% of the domestic market with turkey meat. In its enterprise at Lom u Tachova the company processes 1000 tonnes of turkey and turkey-hen meat monthly.
The annual consumption of poultry meat in the Czech Republic reached some 25 kg per head of population of which turkey meat accounts for a mere 1.8 kg/head. The figure is 3 – 4 times higher in Europe, said Wolfgang Wagner, Czech Turkey CEO.
The Czech market with turkey meat is lagging behind the remaining EU countries. Wagner said that turkey meat consumption has been fluctuating seasonally with a considerable increase before Christmas and Easter holidays. In Poland, for instance, the turkey meat consumption was 4 – 5 kg per head of population.

Lidru a.s.

The company has been established through the transformation of the cooperative Libotenice where laying hens had been traditionally reared until the mid 1970s. Only the rearing of pullets and consumer egg production remained from the former cooperative's business activities.
A medium-sized enterprise belongs among the few producers and suppliers of white eggs.

Even in this enterprise, like in many others recently, the Czech producers of consumer eggs invested heavily into the reconstruction of the existing cage technologies. This was with respect to the laying hens´ welfare as well as in connection with the increasing requirements of modernisation of final production, i.e. sorting, storing and processing of eggs, including distribution of the entire production. All this within the veterinary and hygiene regulations corresponding with the harmonised EU CAP regulations.
According to company director ing. Frantisek Novák, foreign eggs have been imported into the Czech Republic at prices well below real production costs. It is not only a matter of consumer eggs but also of eggs for processing, often of inferior quality, which are distributed within the market network after re-sorting.
The domestic laying hen farmers consider such a situation as very discriminatory.
The frequent imports go hand in hand with aggravated possibilities of sales of the domestic eggs on the market. Director Novák complained that this is precisely why his enterprise could not fully use its production capacities which was around 70 – 75 million eggs annually. In 2005 the estimate was to produce a total of 59 – 60 million eggs. Of that production, more than 60% was sold via the marketing group Česká Vejce (Czech Eggs) into the retail network and for processing.

The enterprise is housing egg layers in eight halls. The eggs are laser-marked using the Injet System. The marking system is of a standard type respecting new requirements of egg and package marking.The sorting machine Staalkat is of Dutch origin with an average capacity of around 30 000 eggs per hour.
The average laying hens yield is 307.5 eggs at 139.6 g of compound feed per one egg.
After the laying cycle the culled hens are sold by weight to processing companies at an average price of 2.50 CZK/kg. The current buyer has been Jihočeská drůbež Vodňany, and recently a German slaughter firm has become another buyer. Selling the culled hens abroad has been problem-free and more profitable, as the domestic slaughterers are not interested in culled hens and they often refuse to buy them at all.
Annual supplies of 10 – 11 000 tonnes of compound feed for the pullet rearing and layer breeding has been shared by three compound feed producers. One of the suppliers and the largest Lidru shareholder has been Agroslužby Trnovany a.s. which covers almost a third of the total volume of compound feed supplied.

Avesco s.r.o.

Aversco s.r.o. (Ltd) at Louny is one of the firms rearing egg layers on deep litter. Ing. Miloš Novák, company director, has said that the domestic market has recently been flooded with consumer eggs imports. This has been reflected in the low price of the eggs. As the Czech consumer still does not respect the higher egg price from alternative systems, such eggs are often marketed at below-production costs.
The company´s business risk has been spread into three commodities, i.e. the egg production on deep litter, fattening broiler chickens and mushroom production. Two fattening plants – at Blšany with a single input capacity of 90 000 chickens, and the other at Zbrašín with 40 000 chicks.
The company has opted for the alternative egg layers management at the time when the egg price on the market ranged between 2.20 and 2.40 CZK/egg, while nowadays the price has been 1.40 CZK/egg. The company owns idle capacities for laying hen management, and the sorting equipment has also been constructed for higher egg production capacity. The sorting equipment has currently been used at some 30%, its capacity being around 50 000 egs in two

work shifts. The company hopes for better egg prices on the market and subsequently it will increase its production.

Avesco s.r.o. – farm Solopysky

The farm applies a non-stop system when the farm and its technologies are used from the single input of day-old chicks until the removal of the culled hens. The farm facilities at Solopysky have a capacity of 6700 birds for the pullet rearing and laying hens management. So far the only single input of day-old chickens of the laying hybrid Isa Brown has been supplied from the hatchery Integra Co. at Žabčice. The chickens thereby supplied have already been vaccinated (against the Mark disease, and if neccesary depending on the situation and upon the purchasers´ requirements, against contagious bronchitis and the Newcastle disease), and with cauterized beaks.
The egg yield on deep litter with its estimated 290 eggs per layer is lower compared with the cage system reaching about 87 % of the cage yield.
The HACCP critical point system is applied so as to comply with the compulsory health safety of the final product. Even the production of organic eggs has been contemplated, however such eggs are much more expensive and Czech consumers do not buy them in significant volumes.

Xaverov a.s.

The information has been provided by Zdeněk Štěpánek, Xaverov Ltd. director general. Xaverov being a large poultrymeat supplier has made a great marketing and trading effort to enter the retail chains abroad with its final products, but the result has been unsatisfactory. Although the company complies with all relevant regulations and conditions and it can be price competitive with respect to the CZK / EUR exchange rate and to its domestic production costs, it has had it hard to operate on the EU markets as the old EU-15 countries have been protecting their markets and preferring their own suppliers.
While the sales on the domestic market have often been at the profitability lower margin, the profits from exports have been better. For instance, a chilled chicken costs about 68 CZK/kg in EU, while it has been a mere 45 CZK/kg in the CR. Of the last year´s exports a third went to Germany and the rest mainly to Slovakia and Hungary.
A year ago the EU enlargement brought wider market opportunities but this advantage has been used mainly by the firms who had already been in EU and they have been marketing their oversupplies in the new member states, director Štěpánek said. This has not only been a Xaverov problem but a problem of the entire Czech food sector, he added.
In 2005 Xaverov increased its exports by about 3% to CZK 150 m. The company sold its commodities worth just under CZK 2 bn.

Chicken fattening only in second position

The joint stock company Agricultural Purchasing and Purveying Co (ZZN) at Mělník which is part of the Agrofert Holding Co., besides broiler fattening also deals in trading with crop commodities, it also deals in agrichemicals and fertilisers, or in the production of complete and supplementary feed compounds for monogastric farm animals. The feed production industry has a major share of the company´s assets. Modern feed compound plants are equipped with computer controlled mixing equipment. It is the computer technology which

plays a major role in setting the compound recipes not only for fattening but also for chicken rearing or for the breeding and yielding egg layers, as well as for turkeys and pigs.
The entire company´s annual chicken input has been 3 711 000 chickens in seven batches. The company owns four fattening farms. Two of them are at Libus with the total input of 265 000 chicks, and a plant at Horňátky with 135 000 and at Liběchov with 70 000 chicks. The company puts in 3 711 000 Ross 308 genotype chickens annually. The exclusive supplier of day-old chicks has been the Xavergen Joint Stock Co. supplying its chicks from the hatchery at Žatec.
The fattened chicks go for slaughter at 38 - 39 days of age at standard weight of 1.9 – 2 kg. In order that the company can match the planned seven batches a year, the housing for every other following batch must be ready within 10 days instead of the usual 14 days.

The Rabbit CZ Group

Company director is Mr. Zdeněk Jandejsek. This company was originally a farming cooperative, nowadays it is one of the largest and most dynamic domestic processors of poultry and rabbits. The Rabbit CZ Group increased its output in 2004, according to the non-audited result, to CZK 3.6 billion against CZK 2.6 billion in 2003. In 2005 the output should go up to CZK 4.4 billion.
The economic results have a growing tendency in all group-member companies. For instance, Rabbit Trhový Štěpánov had its results up by CZK 200 million having achieved more than CZK 1.6 billion, and the Jatky Český Brod (slaughterhouse) increased its production results by CZK 100 million having reached CZK 630 million. Between 20% and 25% of the production was exported. Seven daughter companies deal with primary production on some 16 000 hectares. The group owns piggeries, poultry and rabbit plants, slaughter houses, delicatessen production units and around 110 retail shops.
The company employs about 1040 workers. In 2004 the company invested mainly into pre-production activities – a new compound feed factory was built at Chotýšany, Benešov, and more investment went into the cooling technologies in the abbatoirs at Trhový Štěpánov, Český Brod and Kasejovice.

Annex 2 List of contacts
addresses of major producers, slaughterhouses, processors, importers, traders, distribution, supply companies, institutional sector

The most important chicken producers (mentioned in chapter 1.2.)

Agrodružstvo Jevišovice		671 53	Jevišovice	www.agd-jevisovice.cz
Velkovýkrmny Mělník, a. s.	Červená Lhota 1	277 45	Červená Lhota - Úžice	
Farma u lesa, a. s.	Sudoměřice u Bechyně 6	391 65		
Jihočeská drůbež, a. s.	Radomilická 886	389 01	Vodňany	www.jd.cz

The most important eggs producers (mentioned in chapter 1.2.)

Česká drůbež, s. r. o.	Velký Malahov 39	346 01		
Agro Čejetice, s. r. o.	Čejetice 106	386 01	Strakonice	
Agropodnik Hodonín a. s.	Ratíškovice 1271	696 02		
Drůbežárna Holešov, spol. s r. o.	Bořenovská 1356/11	769 01	Holešov	www.drubez.com

The most important poultry meat processors (mentioned in chapter 2.3.)

Xaverov a.s.	V Lužích 735/6	142 01	Praha 4	www.xaverov.cz
Otínská krůta, a.s.	Lopatecká 223/13	147 00	Praha	
Integral Vrchovina, a. s.	Klostermannova 516	564 01	Žamberk	
MSDZ Promt a. s.	Chrlická 522	664 42	Modřice	
Mavela, a. s.	Plavnice	370 01	České Budějovice	

National cooperative poultry meat farmers

DISK -Celostatní odbytové družstvo producentů jatečné drůbeže	U topíren 860/2	17041	Praha 7

Summary of organisations

Name	Address	code	town	Website
Czech-Moravian Poultry Breeders Union	U Topíren 2	170 00	Praha 7	www.agrocr.cz/spol-druberarska_unie.html, www.unie.wz.cz
Association of Poultry Processors	Popovická 12	101 00	Praha 10	-
International Poultry Testing Station	Ústrašice 63	390 02	Tábor	-

List of selected State, scientific and professional organisations

Company name	Address	postcode	town	website
Ministry of Agriculture ČR	Těšnov 17	117 05	Praha 1	www.mze.cz
Reserach Institute of Animal Production	Přátelství 815	104 01	Praha 114 - Uhříněves	www.vuzv.cz
Agrarian Chamber ČR	Štěpánská 63	110 00	Praha 1	www.agrocr.cz
Agricultural Union ČR	Hybernská 30	110 00	Praha 1	www.zemsvazpraha.cz
Association of Private Farming	Dělnická 30	170 00	Praha 7	www.asz.cz
Food Chamber ČR	Počernická 96/272	108 03	Praha 10	www.foodnet.cz
State Veterinary Administration	Těšnov 17	117 05	Praha 1	www.svscr.cz

Summary of firms supplying housing technology equipment for the poultry sector

Company name	street	Postal code	town	website
AGE s.r.o	Osvobození 448	517 71	České Meziříčí	www.age.cz
Big Dutchman	Mírové nám. 696/5	398 01	Písek	www.bigdutchman.cz
Cooperativ, s. r. o.	Antala Staška 32	146 20	Praha	www.cooperativ.cz
Easy spol. s r. o. (Staalkat)	Třinecká 650	199 00	Praha 9	
Phramed, s. r. o.	Mendlova 32	742 35	Odry	www.phramed.cz
ROmiLL, spol. s r. o.	Kotlářská 53	658 92	Brno	www.romill.cz
STS Hostivice a. s.	Sportovců 881	253 80	Hostivice	www.volny.cz/andy.sts
Zeman – OTS	Čelakovského 2	412 01	Litoměřice	www.zeman-ots.cz

Summary of firms producing feed compounds or complements for poultry nutrition

Company name	street	code	town	website
AGROBAC	Dubec 38	348 06	Přimda	www.agrobac.cz
Alltechnology C.Z., s. r. o.	Ve Žlíbku 1849/2A	193 00	Praha 9 - Horní Počernice	www.alltech.com/czech
BARENTZ spol. s r.o	Za Tratí 752	339 01	Klatovy	www.barentz.cz
Biofaktory Praha, s.r.o.	Na Chvalce 2049	193 00	Praha 9 - Horní Počernice	www.biofaktory.cz
Bioferm CZ, spol. s r. o.	Banskobystrická 55	621 00	Brno	www.bioferm.com
Bodit Tachov, s. r. o.	Luční 1791	347 01	Tachov	www.bodit.cz
Delacon Biotechnik, s. r. o.	Bohdíkovská 7	787 01	Šumperk	www.delacon.cz
Delacon Biotechnik, s. r. o.	Bohdíkovská 7	787 01	Šumperk	www.delacon.cz
GUYOKRMA, spol. s r. o.	Žirovnická 2389	106 00	Praha 10	www.guyokrma.cz
Iframix	Štěrboholská 26	102 00	Praha 10	www.infamix.cz
Kemin Central Europe s. r. o.	Lužná 591	160 00	Praha 6	www.kemin.com/europe
Lohmann Animal Health GmbH	Staré Sedlo 90	398 07	Orlík nad Vltavou	www.lah.de
NOACK ČR, spol. s r. o.	Květnového vítězství 160/68	149 00	Praha 4-Háje	www.noack.cz
Rothel Praha, spol. s r. o.	Pod Kavalírkou 18	150 00	Praha 5-Smíchov	www.roethel.cz
Schaumann ČR, s. r. o.	nám. Svobody 35	387 01	Volyně	www.schaumann.cz
Slavkovské krmné směsi, a. s.		685 01	Marefy	www.sksmarefy.cz
TEKRO spol. s r.o.	Višňová 2/484	140 00	Praha 4	www.tekro.cz
Univit, s. r. o.	Na Vlčinci 3	779 00	Olomouc	www.univit.cz
VVS Verměřovice s.r.o		561 52	Verměřovice 159	www.vvs.cz

Survey of suppliers of veterinary preparations

Company name	*Address*	code	town	website
Tekro	Višňová 2/484	140 00	Praha 4	www.tekro.cz
Biopharm (Fartro)		254 49	Jílové u Prahy	www.bri.cz
Intervet	Na Radosti 413	155 21	Praha 5	www.intervet.com
Pfizer Animal Health	Stroupežnického 17	150 00	Praha 5	www.pfizer.cz
Medipharm CZ	Starovice 215	693 01	Hustopeče u Brna	www.medipharm.cz
Novartis	U Nákladového nádraží 10	130 00	Praha 3	www.novartis.cz
Krka	Sokolovská 79	186 00	Praha 8 - Karlín	www.keka.si.sz
Bayer	Litvínovská 609/3	190 21	Praha 9	www.bayer-ag.de

Companies approved for production of one-day chickens and hatching eggs

Company	Street	Postal Code	Town
XAVERgen, a.s.	Hřbitovní 243	25081	Nehvizdy
XAVERgen, a.s.		25801	Jinošov, pošta Vlašim
XAVERgen, a.s.		28601	Horky 7
Kachní farma Strkov		39111	Planá na Lužnicí
Ústrašice	č.p. 63	39111	Ústrašice
Husí farma		37333	Byňov
Ostrovec -líheň		39833	Ostrovec
Otínská krůta, a.s.		34022	Farma Nýrsko
Farma pro odchov kuřic	Myslív u Všerub	34507	Všeruby
Otínská krůta, a.s.		33901	Farma Otín
Otínská krůta, a.s.		33501	Dvorec 167
Otínská krůta, a.s.		33901	Farma Otín
Otínská krůta, a.s.		34802	Farma Boječnice
XAVERgen, a.s.		35708	Dolina
XAVERgen, a.s.	tř. Vítězství 68/4	35301	Mariánské Lázně
Libotenice odchovna	Libotenice	41201	Litoměřice
Proagro a.s.	Huntířov - odchov kuřic	40742	Markvartice
XAVERgen, a.s.	Středisko Slavětín, farma Blšany2	44001	Louny
XAVERgen, a.s.	Středisko Slavětín, Farma Vroutek	43982	Vroutek
XAVERgen, a.s.	Středisko Slavětín, farma ASTRA Žatec	43801	Žatec
XAVERgen, a.s.	Středisko Slavětín, farna Blšany1	44001	Louny
Proagro a.s.	Benešov n/Ploučnicí - odchov kuřic	40722	Benešov nad Ploučnicí
XAVERgen, a.s.	Středisko Slavětín, farma Libočany	43801	Žatec
XAVERgen, a.s.	Středisko Slavětín, farma Dvérce	44101	A.P. Podbořany
XAVERgen,a.s.,farma Bezděkov nad Metují		54931	Bezděkov nad Metují
PERENA spol.s.r.o. Lišičky		50351	Lišičky
PERENA spol. s.r.o. Klamoš		50351	Klamoš
XAVERgen a.s. provoz Dolní Přím		50316	Dolní Přím
XAVEROSS s.r.o. Police nad Metují		54954	Police nad Metují
PERENA spol.s.r.o. Chudonice		50401	Chudonice
PERENA spol.s.r.o. Chlumec nad Cidlinou		50351	Chlumec nad Cidlinou
XAVERgen,a.s.,Farma Dvůr Králové	Krkonošská 1320	54401	Dvůr Králové nad Labem
VOSPOL,spol.s.r.o.		51732	Přepychy č.80
MAVE JIČÍN,a.s. Dřevěnice		50713	Dřevěnice
PERENA spol.s.r.o. Luková		50363	Luková
PERENA spol.s.r.o. Dobřenice		50325	Dobřenice
XAVERgen, a. s., provoz Police nad Metují		54954	Police nad Metují
XAVEROSS s.r.o. Teplice nad Metují		54957	Teplice nad Metují
PERENA spol.s.r.o. Smidarská Lhota		50353	Smidarská Lhota
MACH DRŮBEŽ a.s. Skalice		50303	Skalice
MACH DRŮBEŽ a.s. Skalička		50341	Skalička
MACH DRŮBEŽ a.s. Smiřice		50303	Smiřice
PERENA spol.s.r.o. Třesice		50365	Třesice
Hospodářství Rybník	Rybník	56601	Rybník u České Třebové
Hospodářství Albrechtice	Albrechtice 154	56301	Albrechtice u Lanškrouna
Hospodářství Březová		56902	Březová
Hospodářství Dětřichov		56932	Dětřichov
Hospodářství Desná	Desná	57001	Desná

Hospodářství Jarošov	Jarošov	56966	Jarošov
Hospodářství Kunčina	Kunčina	56924	Kunčina
Hospodářství Křenov	Křenov	56922	Křenov
Hospodářství Mělice	Mělice	53501	Přelouč
Líhně Litomyšl	Partyzánská 322	57001	Litomyšl
Hospodářství Janov	Janov 303	56955	Janov
VAJAX, a.s. Choceň	Litomyšlská 166	56501	Choceň
Hospodářství Budislav	Budislav	56965	Budislav
Hospodářství Holotín	Holotín	53501	Holotín
Hospodářství Boršov		56921	Boršov
Hospodářství Skořenice		56101	Skořenice
Hospodářství Netřeby		56002	Netřeby
Hospodářství Brteč	Brteč u Vysokého Mýta	56601	Brteč u Vysokého Mýta
Hospodářství Třebařov	Třebařov	56933	Třebařov
Hospodářství Předměstí	Starý Svojanov-Předměstí	56992	Předměstí
Hospodářství Sklené	Sklené	56802	Sklené
chov Habry I a II		58281	Habry
drůbežárna Pelhřimov		39301	Pelhřimov
chov Dolní Cerekev		58845	Dolní Cerekev
chov Vaneč		67571	Vaneč
chov Otín		58822	Otín
chov Vanov		58856	Vanov
líheň Dolní Cerekev		58845	Dolní Cerekev
chov Golčův Jeníkov		58282	Golčův Jeníkov
líheň Habry		58281	Habry
chov Cejle		58851	Cejle
líheň Studenec		67502	Studenec
líheň Horní Lhotice		67572	Horní Lhotice
rybník Nový Studenecký-Stejskal		67502	Koněšín
chov Náměšť nad Oslavou	Kleinovka 42	67571	Náměšť nad Oslavou
chov Sedlec		67571	Sedlec
líheň housat Rohozná		58844	Rohozná
chov Kostelec		58861	Kostelec u Jihlavy
chov hus Rohozná		58844	Rohozná
odchovna Častotice		67571	Častotice
chov Sasov		58601	Sasov
chov Radkov		58856	Radkov
chov Zvolenovice		58856	Zvolenovice
Kozlany	Kozlany	68341	Kozlany u Vyškova
Odchovné zařízení	Komenského 511	66701	Židlochovice
Integra a.s.	Zemědělská 53	66463	Žabčice
Bantice		67161	Bantice
provoz Moravský Krumlov		67201	Moravský Krumlov č.p. 398
odchovna kuřic		66463	Unkovice
AGROPODNIK Hodonín, a.s.	středisko chovu brojlerů	69605	Milotice u Kyjova
AGROPODNIK Hodonín, a.s.	středisko chovu nosnic	69602	Ratíškovice 1271
XAVERgen,a.s.	farma Josefinský Dvůr	69650	p.Moravany
Rybářství Hodonín, s.r.o.	Písečná 741	69501	Hodonín
DABA,spol.s r.o.		67126	Velký Karlov
DABA,spol.s r.o.		67168	Šanov nad Jevišovkou-Emín
líheň bažantů Židlochovice	Tyršova 1	66701	Židlochovice
odchov Knížecí les		69164	Nosislav
Líheň Hrušovany	Litobratřická 763	67167	Hrušovany nad Jevišovkou
Havraníky		66902	Havraníky
Odchovné zařízení	Moravany u Brna	66448	Moravany u Brna

AGROPODNIK Hodonín, a.s.	středisko chovu brojlerů	69613	Šardice
DABA,spol.s r.o.		67126	Velký Karlov
líheň Přísnotice		66463	Přísnotice
chov drůbeže Žabčice	Kotlůvek	66463	Žabčice
Práče		67161	Práče
A B R O - Zdražílek	Litobratřická 763	67167	Hrušovany nad Jevišovkou
NEOKLAS a.s.	farma Šardice	69613	Šardice
AGROPODNIK Hodonín, a.s.	středisko odchovu kuřic	69601	Rohatec
Odchovné zařízení		69611	Mutěnice
JASENOVÁ,spol.s r.o.		69671	Blatnička
JASENOVÁ,spol.s r.o.		69671	Blatnice pod Sv.Antonínkem
Rybářství Hodonín, s.r.o.	Písečná 741	69501	Hodonín
drůbežárna Brod nad Dyjí		69201	Brod nad Dyjí
rod.chov bažantů Židlochovice	Tyršova 1	66701	Židlochovice
Šatov		67122	Šatov
provoz Moravský Krumlov		67201	Rybníky
A B R O - Zdražílek	Litobratřická 763	67167	Hrušovany nad Jevišovkou
XAVEROV, a.s.	farma Milotice u Kyjova	69605	Milotice u Kyjova
XAVERgen, a.s.	Lopatecká 223/13	79851	Praha 4
XAVERgen, a.s.	Lopatecká 223/13	79851	Praha 4
MACH DRŮBEŽ, a.s.	Partyzánská č. 322	78401	Litomyšl
Farma Újezdec		68734	Újezdec u Luhačovic
Provoz Uherský Ostroh	Veselská 88	68724	Uherský Ostroh
Provoz Boršice		68709	Boršice u Buchlovic
Provoz Prakšice		68756	Prakšice
Provoz Stříbrnice		68709	Stříbrnice
Farma Bynina		75701	Bynina
Karel Grim,Farma Grim		74901	Vítkov-Podhradí
BEST,spol. s r.o.	Přemyslovců 60	74707	Opava-Jaktař
BEST spol. s r.o.		79331	Světlá Hora
Jakubčovice		74745	Jakubčovice
Hrabství		74745	Hrabství
BEST spol. s r.o.	M.Albrechtice-Hynčice	79373	Město Albrechtice
BEST, spol. s.r.o.		74301	Bravinné
ZEMPRO Opava a.s.	Ratibořská 172	74705	Opava -Kateřinky
SCHROM FARMS spol. s.r.o.	č.15	74253	Kunín
SCHROM FARMS spol. s.r.o.	Štramberská 1541	74258	Příbor
Agropodnik Dvorce,a.s.	Olomoucká 373	79368	Dvorce
Václav Kremzer-RCHD		74770	Komárov
DENAS, spol. s.r.o.		74254	Bartošovice
SCHROM FARMS spol. s.r.o.		74301	Bílovec
BEST spol. s r.o.		79201	Milotice nad Opavou
Farma Doubrava, s.r.o.	Doubravský kopec 1	73533	Doubrava u Orlové
Farma Doubrava, s.r.o.	Porubská 1215	73532	Rychvald u Karviné
Rostislav Sýkora		73923	Stará Ves n.O. 158

Meat slaughterers and processors of poultry and eggs

Company name	Address	Postal code	town
ADEX AGRO a.s.	Lom u Tachova 20	34701	Lom u Tachova
ADEX AGRO, a.s.	Tuřanka 21	62700	Brno
AGPI a.s. Písek	Vrcovická 8	39701	Písek
AGPI, a.s.	Čekanice	39002	Tábor
AGRICOL s.r.o.	Kladská 916	50003	Hradec Králové
AGRICOL s.r.o. výrobna majonéz	Terezy Novákové 521	57201	Polička
Agri-M s.r.o.	areál ZOD	68712	Mistřice
AGRO & KOMBINÁT Dolní Žandov spol.s r.o.	Dolina 12	35708	Krajková
AGRODRUŽSTVO MORKOVICE,družstvo	areál ZD	76833	Prasklice
AGROPODNIK Hodonín a.s.,závod 01,	Ratíškovice č.p.1271	69602	Ratíškovice
Agros Vyškov - Dědice a.s.	Jízdárenská 590	68201	Vyškov
ANIMO Žatec a.s. - závod Černčice		43901	Černčice u Loun
AVIAN - M.Z.s.r.o.	Smetanova 184	75131	Lipník nad Bečvou
Beskydské uzeniny, a.s.	Fryčovice č.658	73945	Fryčovice
BI - OVO spol. s r.o.	Minkovická 486	46312	Liberec 23 - Doubí
BIKOS spol. s r.o.	Košíkov	59501	Velká Bíteš
BOHEMIA VITAE Jindřichův Hradec, a.s.	Jirásk.předm.630/III.	37701	Jindřichův Hradec
Černý R. mraz.sklad drůb.	Na Samotě 297	74101	Nový Jičín - Žilina
Česká drůbež s.r.o.	Velký Malahov 39	34601	Velký Malahov
DIEMA s.r.o.	Na Poříčí 1198	73801	Frýdek - Místek
Dobro s.r.o.	5.května 278	25087	Mochov
DOLS, spol. s r.o.	Nádražní 285	47123	Zákupy
Drůbež - Vysočina spol.s r.o.	K Hoře 735	67620	Moravské Budějovice
Drubež Frost s.r.o.	Lobodice 223	75101	Lobodice
DRŮBEŽ PŘÍŠOVICE a.s.	Příšovice č.p. 10	46346	Příšovice
Drůbežárna Holešov spol. s r.o.	Bořenovská 1356	76901	Holešov
Drůbežárny Osík, a.s.	Mařákova 931	56967	Litomyšl
Drůbežářský závod Klatovy a.s.	5.května 112	33904	Klatovy IV.
DRUHAZ Červený Hrádek	Na Červeném hrádku 793	26401	Sedlčany
DRUKO STŘÍŽOV s.r.o.	Střížov 1141	33401	Přeštice
DŽV Rychnov nad Kněžnou a.s.	V Grundě 511	51742	Doudleby nad Orlici
Europotraviny s.r.o.	K Chýni 1250	25301	Hostivice
FOLDA, s.r.o.	Frýdlantská 540	46401	Raspenava
Framagro a.s.		50713	Soběraz
FRAMAGRO a.s.	Tovačovská ul.2874	75101	Přerov
GASTROMA a.s.	Strabenice 62	76813	Strabenice
H2P s.r.o.	U Slunečních lázní 14	46014	Liberec
Ing. Jindřich Vokoun	Selská 81	61400	Brno
Ing.Milan Belatka	Kaštanová č.467	67972	Kunštát na Moravě
Ing.Zachariáš Jaroslav	Veselíčko 235	75125	Veselíčko
Intergal Vrchovina a.s.	Skořenice 135	56501	Choceň
Intergal Vrchovina a.s.,provoz Žamberk	Klostermannova 516	56401	Žamberk
IVEMO, s.r.o.	Malotice 96	28163	Malotice
J.J.R., s.r.o.	Čs.Armády 360	73551	Bohumín-Pudlov
Jan Špilar, Ryby - drůbež	Teslova 13	30100	Plzeň
Jaroš Group, s.r.o.	Dubí 988	27203	Kladno
JEDNOTA Opava SD	Markvartovická 1045	74801	Hlučín
Jihočeská drůbež a.s.	Radomilická 886/II	38901	Vodňany
Jihočeská drůbež Mirovice, a.s.	Zámostí 272	39806	Mirovice
Jihočeská drůbež Tábor, s.r.o.	Vožická č.2047	39002	Tábor

Jiří Hrstka	U Vlečky 3291/11	40004	Ústí nad Labem
Kolínské maso a uzeniny, Petr a Miroslav Kasardovi	U Kostelíčka 60	28002	Kolín V
Kostelecké uzeniny a.s. závod Hodonín	Velkomoravská 3929	69578	Hodonín
Kostelecké uzeniny,a.s.	Kostelec u Jihlavy 60	58861	Kostelec u Jihlavy
Krůta Ostrava s.r.o.	Nad Porubkou 280	72100	Ostrava - Svinov
LIDRU, a.s.	Libotenice 153	41201	Libotenice
MASIKO, s.r.o.	Prosiměřice č.p.43	67161	Prosiměřice
Maso - Třebovle s.r.o.	Třebovle 15	28161	Třebovle
MASO ŽĎÁRSKO s.r.o.	Světnov 68	59102	Žďár nad Sáz.
MASOCENTRUM CZ, s.r.o.	Vendryně č.131	73994	Vendryně
MASOEKO s.r.o.	Kunčice 243	56151	Letohrad
MAVE Jičín a.s.		50713	Soběraz
MAVELA a.s. Dynín		37364	Dynín
MAVEX Cheb, spol. s r.o.	Plesná	35135	Plesná
Michal Brandl	Modlany 110	41713	Modlany
Minařík Miloš	Cézavy 700	66456	Blučina
Moravskoslezské drůbežářské závody PROMT a.s.	Mlýnská 192	74792	Háj ve Slezsku
MSDZ PROMT a.s.	Chrlická 522	66442	Modřice
MSDZ Promt a.s.	Martinovská 3168	72300	Ostrava-Martinov
Mydlářka a.s.	Mydlářka 253	25601	Benešov
NOWACO C+C Liberec s.r.o.	České Mládeže 462	46008	Liberec 8
OVUS - podnik živočišné výroby spol. s r.o.	Těhul	27480	Slaný
OVUS-PŽV,spol.s r.o.	Španielova 1378	16300	Praha 6
Padělek, s.r.o.	Udeřice 7	67555	Udeřice
Petr Puchr - FROZEN	Klopina 33	78973	Klopina
Podnik pro výrobu vajec v Kosičkách, s.r.o.	Kosičky	50365	Kosičky
Podnik živočišné výroby, a.s. Vajax Strakonice	Nebřehovická 522	38601	Strakonice
PR market, s.r.o., PR 07	Dukelská 1017	73961	Třinec
PRAVE Rakovník,a.s.	Kuštova 2317	26901	Rakovník
PROAGRO Nymburk a.s. stř.10 210	Pražská 776	28903	Městec Králové
PROTEIN FOODS, s.r.o.	Tyršova 682	33027	Vejprnice
PROVIO a.s.	Černožice nad Labem 170	50304	Černožice nad Labem
První roudnická, a.s.	Chelčického 627	41301	Roudnice nad Labem
Pštrosí porážka a bourárna	Židovice 127	41183	Hrobce
PŽV a.s.Nový Jičín	Kunín	74253	Kunín
Rabbit Trhový Štěpánov, a.s.	Trhový Štěpánov 302	25763	Trhový Štěpánov
RACIOLA - JEHLIČKA s.r.o.	Pod Valy 221	68801	Uherský Brod
Raciola Jehlička s.r.o.	U porážky	68818	Uherský Brod
ROPO-drůbež,s.r.o.	Čimická 156/32	18100	Praha 8
Selská vejce s.r.o.	Raisova 5484	43001	Chomutov
SCHROM FARMS spol.s r.o.	Komenského 669	74301	Bílovec
SCHUBERT Michael	Želivského 2	13000	Praha 3
SPAK - VSD Austria a.s., výr. závod Sušice	Nádražní 623	34201	Sušice
Statek Miroslav a.s.	Nádražní 451/1	67172	Miroslav
Statek Pohořelice, spol. s r.o.	Velký Dvůr	69123	Velký Dvůr
Š & L DRŮBEŽÁRNA VEJPRNICE spol.s r.o.	Tyršova 682	33027	Vejprnice
Špika Radek, BADA Špika R., Svoboda L., Sdružení fyzických osob	J. Švermy 268	46010	Liberec 10
ŠZP Lány		27061	Lány
UNIKOM, a.s. Kutná Hora	Markovice 10	28601	Markovice
Unilever ČR, spol. s r.o.	Čs. armády 41	78901	Zábřeh na Moravě
UNILEVER ČR, spol. s r.o.	Nelahozeves 163	27751	Nelahozeves

V PRON, s.r.o.	Lískovec č. 297	73801	Lískovec
Václav Matoušek	Mračská 1	25722	Čerčany
VAIGL A SYN spol.s r.o.	Droužkovická 291	43141	Údlice
Velkopavlovické drůbežářské závody,a.s.	Tovární 3	69106	Velké Pavlovice
VEMA, a.s.	Dašická 911	53701	Chrudim
VIDORA-porcovna chlazené drůbeže	Kostelecká 18	27716	Všetaty
XAVEROV,a.s.	V Lužích 735/6	14201	Praha 4-Libuš
Záruba M+K a.s.	Vrbenská481/27	37021	České Budějovice
ZAS Hluboš - Trnová		26301	Trnová
ZD Dolní Cerekev	Dolní Cerekev	58845	Dolní Cerekev
Zelenka s.r.o.	Loosova 1	63800	Brno
Zelenka s.r.o.	Tuřanka 21	62700	Brno
ZEMASPOL a.s.	areál ZOD	68801	Uherský Brod
Zemědělské obchodní družstvo		47129	Brniště
Zemědělský podnik,a.s.Město Albrechtice	Zámecká č.p. 83	79395	Město Albrechtice
ZEMPRO Opava,a.s.	Ratibořská 172	74705	OPAVA
ZEVOS a.s. Uherské Hradiště	Velkomoravská 1923	68603	Staré Město