

# AGRICULTURE

## Helgi's Pocket Guide

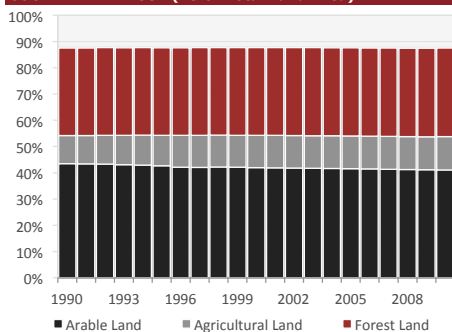
December 2012

Czech Republic

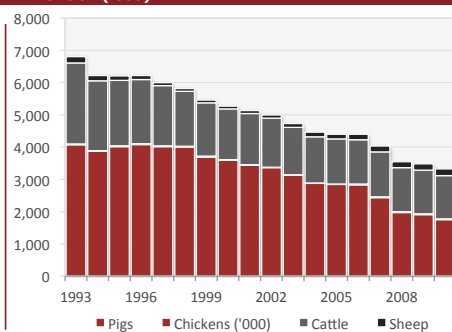
CZECH AGRICULTURE AT A GLANCE	1990	1995	2000	2005	2010
Agricultural Land Area (sq.km)	42,820	42,800	42,800	42,600	42,335
Agricultural Land Area (As % Of Country Land Area)	54.3%	54.3%	54.3%	54.0%	53.7%
Arable Land Area (sq.km)	32,190	31,430	30,824	30,473	30,081
Arable Land Area (As % Of Country Land Area)	43.1%	42.7%	42.0%	41.5%	41.2%
Forest Land Area (sq.km)	26,295	26,301	26,373	26,474	26,574
Forest Land Area (As % Of Country Land Area)	33.3%	33.3%	33.4%	33.6%	33.7%
Agriculture, Value Added (As % Of GDP)	8.1%	4.8%	3.7%	2.9%	2.3%
Employment in Agriculture (As % Of Total Workforce)	6.6%	5.1%	4.0%	3.1%	
Cattle Livestock (mil)	2,512	2,030	1,574	1,397	1,344
Pigs Livestock (mil)	27,160	4,016	3,594	2,840	1,749
Wheat Production (mil tonnes)	216	3,823	4,084	4,145	4,162
Meat Consumption Per Capita (kg)	73.0	84.1	76.5	86.6	83.4
Food Exports (As % Of Merchandise Exports)	8.1%	6.0%	4.1%	4.0%	3.9%



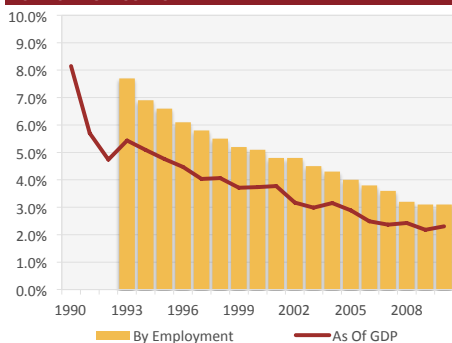
COUNTRY LAND USE (As Of Total Land Area)



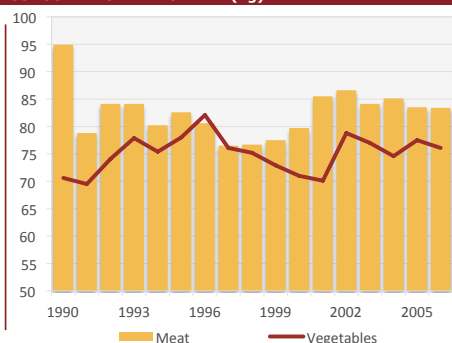
LIVESTOCK ('000)



ROLE OF AGRICULTURE

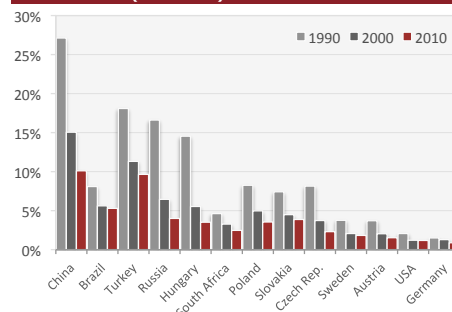


CONSUMPTION PER CAPITA (kg)

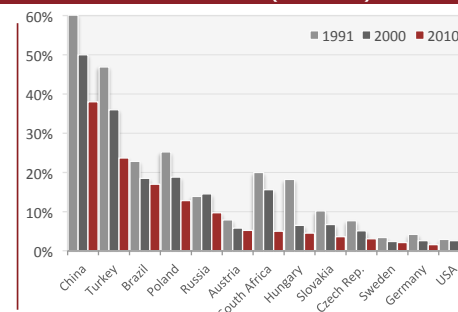


Source: World Bank, National Statistical Office, United Nations, OECD, Faostat, Helgi Analytics calculation

AGRICULTURE (As Of GDP)

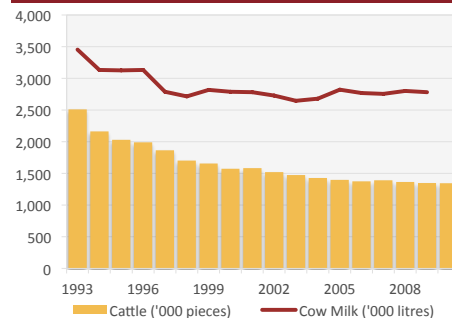


EMPLOYMENT IN AGRICULTURE (As Of Total)

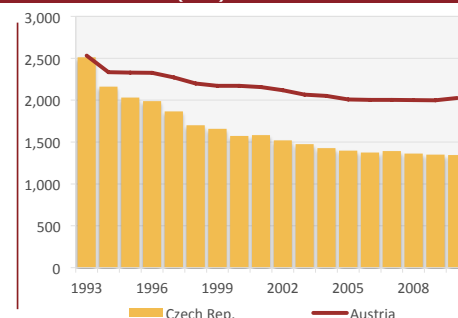


Agriculture forms about 2% of total Czech GDP, a third of the level seen at the beginning of the 1990s. This is unfortunately in line with the falling numbers of livestock production. The contribution of agriculture to the overall Czech economy is one of the lowest among the CEE countries. Fewer than 3% of Czechs work in the agriculture sector now, less than in neighbouring Austria.

CATTLE & MILK PRODUCTION

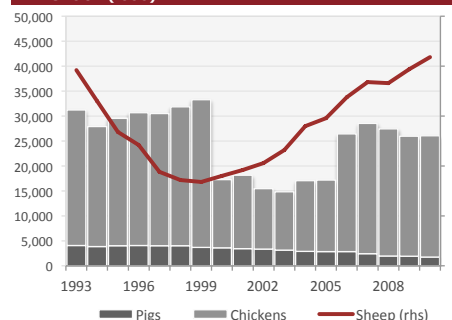


CATTLE LIVESTOCK ('000)

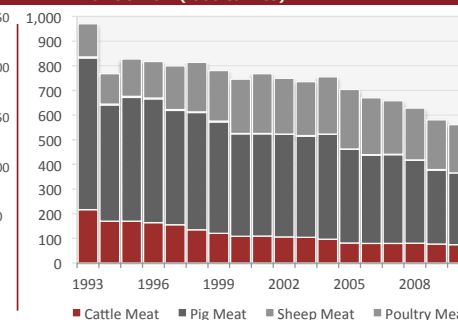


Most of the agricultural production has been falling since the 1990s. The situation has stabilised somewhat since 2004, when the Czech Republic entered the EU (and started receiving subsidies from the CAP); however, the negative trends in terms of production and livestock, as well as employment, continue. The negative trend is especially visible when a comparison is made with the figures from neighbouring Austria, as seen above.

LIVESTOCK ('000)

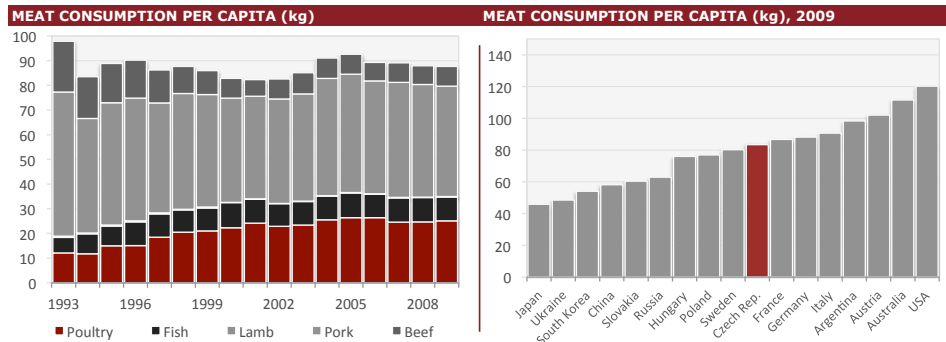


MEAT PRODUCTION ('000 tonnes)

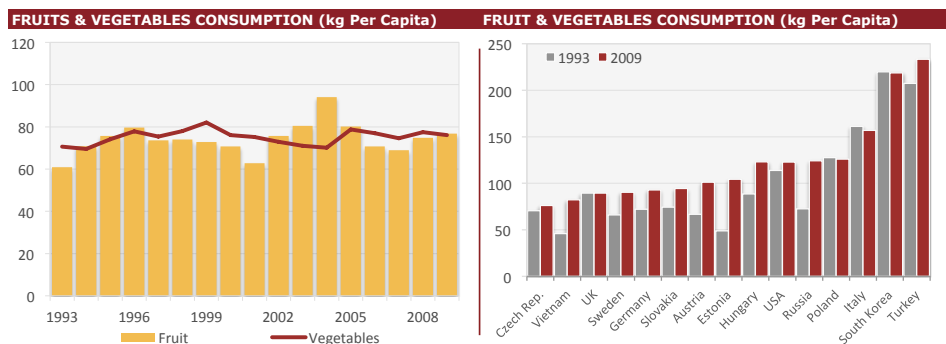


The production of many agricultural products has been heavily dependent on EU subsidies, especially since 2004. The number of sheep has been rising, for example, very much in line with the programme focused on environmental protection, while traditional areas (which receive less support) stagnate. But the overall picture of Czech agricultural remains negative, as demonstrated by the production of meat, for example.

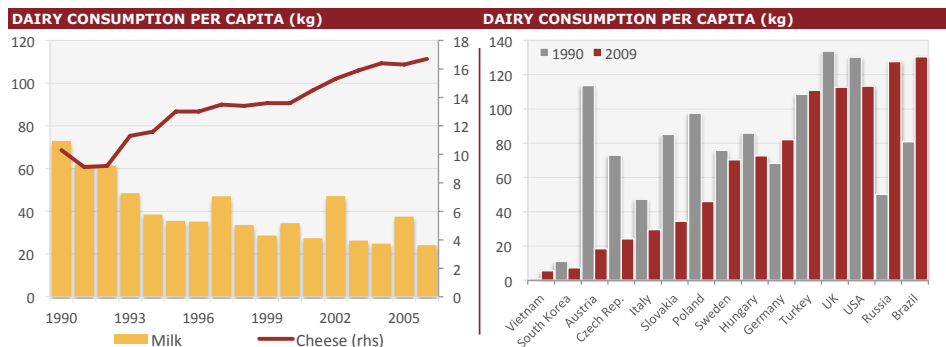
Source: World Bank, National Statistical Office, United Nations, OECD, Faostat, Helgi Analytics calculation



The consumption of meat has been declining since the collapse of the Soviet Bloc in 1989. In 2009, 83 kg was consumed per person, 12% less than in 1995. The structure of the meat consumption had also changed, from beef and pork more towards poultry and fish. Having said that, Czechs still eat less than 10 kg of fish a year per person, a fraction of what their Western neighbours consume.

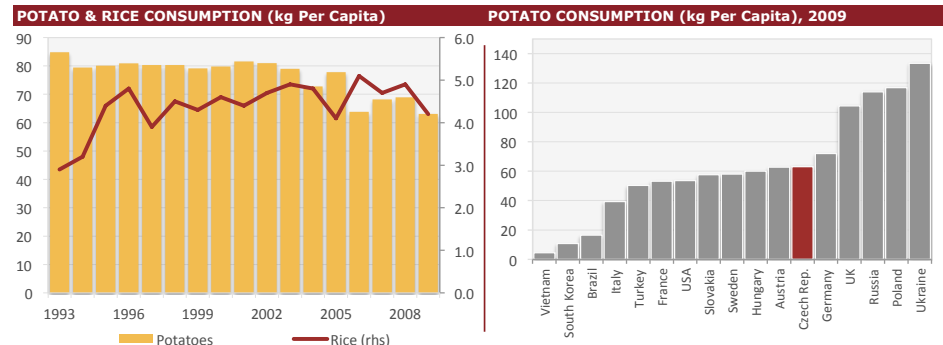


Fortunately, part of the declining meat consumption has been replaced by more fruit and vegetables being consumed. Czechs eat around 80 kg of fruit and vegetables per person a year officially, according to Faostat, but the real numbers must be considerably higher as domestic harvesting remains high. On the negative side, the total consumption of vegetables remains low overall.

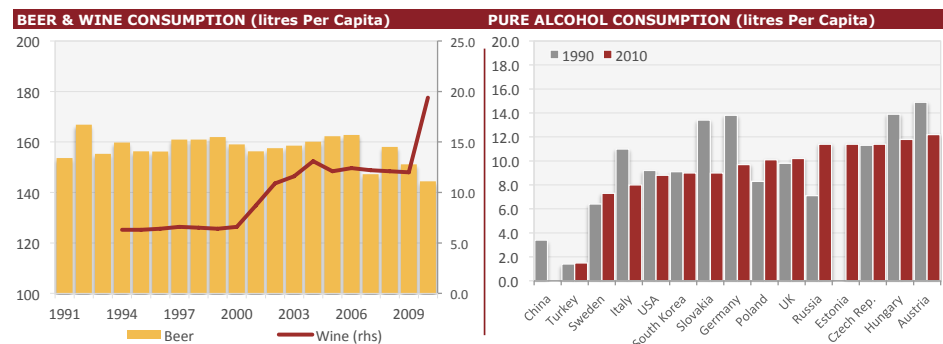


The consumption of milk has stabilised at around 55 kg per person in the last decade, following a sharp decline at the beginning of the 1990s. This is roughly a half compared to the consumption in the US, Russia, or Brazil. On the other hand, Czechs love eating cheese. The consumption of cheese has doubled since 1995 and represents more than 13 kg per person a year.

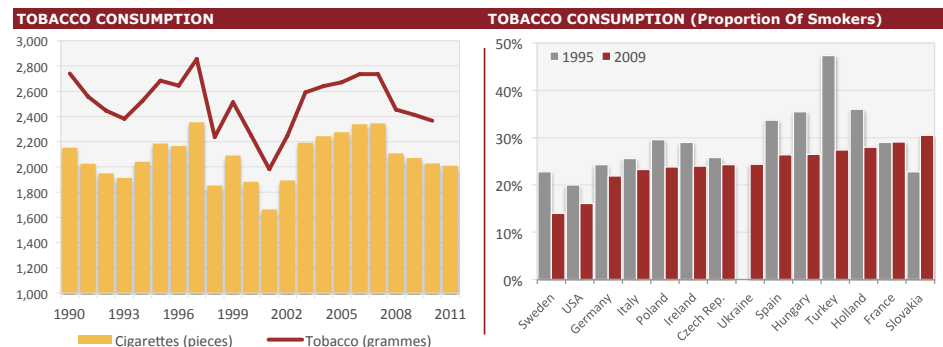
Source: World Bank, National Statistical Office, United Nations, OECD, Faostat, Helgi Analytics calculation



Potatoes are the most popular and important side dish in Central Europe. Russia, Ukraine and Poland consume more than 110 kg of potatoes per person a year, compared to less than 40 kg in Italy and 4 kg in Vietnam. Potatoes, meat and milk are the main items Czechs withdrew from after the collapse of Communism, to offset them with more vegetables and pasta.

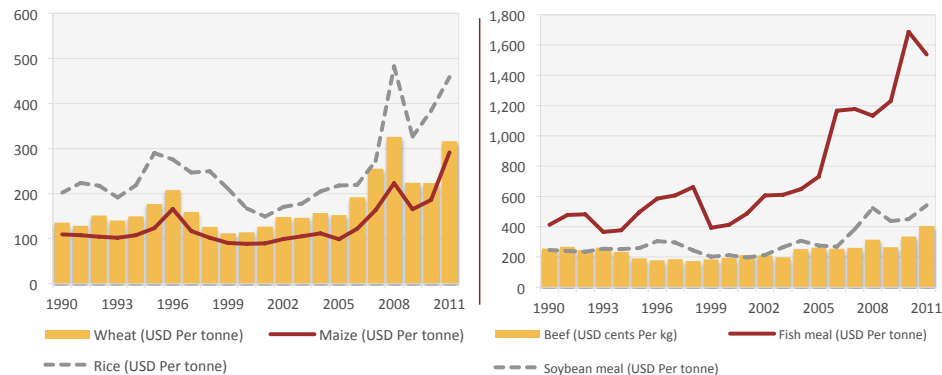
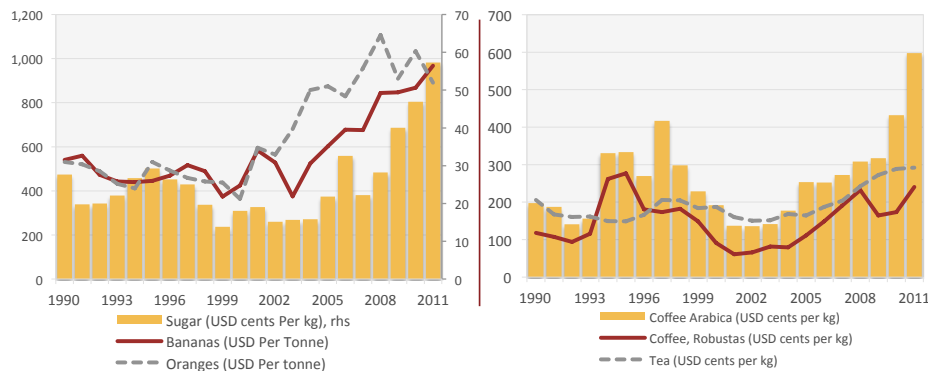
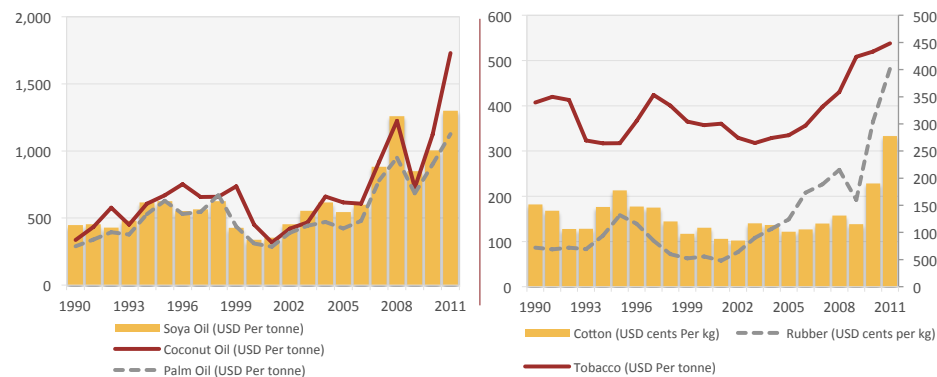


Czechs are among the heaviest alcohol drinkers in Europe, consuming nearly a pint of beer per person a day (including babies). Although the consumption of beer has stagnated for a few years now and has been gradually replaced with wine, the overall alcohol consumption remains very high and is not declining, unlike in most European countries.



Around a quarter of the Czech population smokes regularly, a share that has remained stable for the last two decades. When this is taken together with their high consumption of alcohol and a relatively high level of gambling, Czechs belong among the biggest addicts within Europe.

Source: World Bank, National Statistical Office, United Nations, OECD, Faostat, Helgi Analytics calculation

**AGRICULTURAL COMMODITY PRICES (MAIZE, WHEAT, RICE, SOYA BEANS, BEEF & FISHMEAL)**

**AGRICULTURAL COMMODITY PRICES (BANANAS, ORANGES, SUGAR, COCOA, COFFEE & TEA)**

**AGRICULTURAL COMMODITY PRICES (OILS, RUBBER, TOBACCO & COTTON)**


Source: World Bank, National Statistical Office, United Nations, OECD, Faostat, Helgi Analytics calculation

POPULATION		2003	2004	2005	2006	2007	2008	2009	2010	2011
Population	mil	10.21	10.22	10.25	10.29	10.38	10.47	10.51	10.53	10.50
Population (As % Of World Population)	%	0.16%	0.16%	0.16%	0.16%	0.16%	0.16%	0.15%	0.15%	0.15%
Persons Per Household	persons	2.49	2.49	2.49	2.49	2.46	2.42	2.41	2.38	2.35
Share Of Population (0-14 Years Of Age)	%	15.6%	15.2%	14.9%	14.7%	14.4%	14.2%	14.1%	14.0%	14.1%
Share Of Population (15-64 Years Of Age)	%	70.5%	70.8%	71.0%	71.2%	71.4%	71.5%	71.4%	71.1%	70.7%
Share Of Population (65+ Years Of Age)	%	13.9%	14.0%	14.0%	14.1%	14.2%	14.3%	14.5%	14.8%	15.2%
Median Age	years	38.2	38.4	38.7	38.8	39.0	39.1	39.3	39.4	39.6
Old Age Dependency Ratio	%	19.7%	19.7%	19.8%	19.8%	19.9%	20.1%	20.4%	20.9%	21.5%
Youth Dependency Ratio	%	22.1%	21.5%	21.0%	20.6%	20.2%	19.8%	19.7%	19.7%	19.9%
Life Expectancy, both sexes	years	75.2	75.7	75.9	76.5	76.7	77.0	77.1	77.4	77.4
Life Expectancy At 65, both sexes	years	15.7	16.1	16.3	16.8	17.0	17.3	17.2	17.4	17.4
Total Fertility Rate	children	1.18	1.23	1.28	1.33	1.44	1.50	1.49	1.49	
Urban Population	mil	7.53	7.53	7.54	7.56	7.61	7.67	7.71	7.73	7.75
Urban Population As Of Total	%	73.8%	73.8%	73.7%	73.7%	73.6%	73.6%	73.5%	73.5%	73.4%

AGRICULTURE		2003	2004	2005	2006	2007	2008	2009	2010	2011
Country Land Area	sq km	78,870	78,870	78,870	78,870	78,870	78,870	78,870	78,870	
Agricultural Land Area	sq km	42,690	42,650	42,600	42,540	42,490	42,440	42,390	42,335	
Agricultural Land Area (As % Of Country Land Area)	%	54.1%	54.1%	54.0%	53.9%	53.9%	53.8%	53.7%	53.7%	
Arable Land Area	sq km	30,620	30,547	30,473	30,397	30,324	30,256	30,169	30,081	
Arable Land Area (As % Of Country Land Area)	%	41.7%	41.6%	41.5%	41.4%	41.4%	41.3%	41.3%	41.2%	
Forest Land Area	sq km	26,442	26,457	26,474	26,491	26,512	26,530	26,552	26,574	
Forest Land Area (As % Of Country Land Area)	%	33.5%	33.5%	33.6%	33.6%	33.6%	33.6%	33.7%	33.7%	
Timber Removals	'000 cbm	15,140	15,601	15,510	17,678	18,508	16,187	15,502	17,022	16,270
Total Sawwood Production	'000 cbm	3,805	3,940	4,003	5,080	5,454	4,636	4,048	4,670	6,028
Agriculture, Value Added (As % Of GDP)	%	3.0%	3.2%	2.9%	2.5%	2.4%	2.4%	2.2%	2.3%	
Employment In Agriculture (As Of Total)	%	4.5%	4.3%	4.0%	3.8%	3.6%	3.2%	3.1%	3.1%	
Cattle Livestock (Total)	'000	1,474	1,428	1,397	1,374	1,391	1,363	1,349	1,344	
Pigs Livestock (Total)	'000	3,127	2,877	2,840	2,830	2,433	1,971	1,909	1,749	
Sheep Livestock (Total)	'000	116	140	148	169	184	183	197	209	
Chickens Livestock (Total)	chickens	11,716	14,166	14,322	23,599	26,105	25,488	24,042	24,284	
Wheat Production	'000 tonnes	2,638	5,043	4,145	3,506	3,939	4,632	4,358	4,162	
Cow Milk Production (Whole, Fresh)	'000 litres	2,646	2,680	2,821	2,767	2,756	2,801	2,781	2,683	
Cattle Meat Production	'000 tonnes	104	97	81	80	79	80	77	74	
Pig Meat Production	'000 tonnes	411	426	380	359	360	336	300	291	
Sheep Meat Production	'000 tonnes	1.2	0.8	1.3	1.5	1.5	1.7	1.9	2.2	
Grapes Production	'000 tonnes	67	70	63	58	99	98	69	46	
Rice Production	'000 tonnes									
Number Of Agricultural Tractors		91,648	89,350	87,039	85,426	83,813				
Precipitation In Depth (Annual Average)	mm per year					677	677	677		
Cereal Yield	kg per ha	3,944	5,449	4,746	4,163	4,524	5,364	5,074	4,691	
Fertiliser Consumption (kg Per hectare Of Arable Land)		92	87	90	94	100	87	89		
Food Exports (As % Of Merchandise Exports)	%	3.4%	3.4%	4.0%	3.5%	3.8%	4.0%	4.5%	3.9%	4.1%
Food Imports (As % Of Merchandise Imports)	%	4.8%	5.0%	5.3%	5.1%	5.2%	5.1%	6.3%	5.4%	5.6%
Terrestrial And Marine Protected Areas (As Of Total Territorial Area)	%	15.0%	15.0%	15.0%	15.0%	15.1%	15.1%	15.1%	15.1%	
Terrestrial Protected Areas (As Of Total Land Area)	%	15.0%	15.0%	15.0%	15.0%	15.1%	15.1%	15.1%	15.1%	

HOUSEHOLD CONSUMPTION PER CAPITA		2003	2004	2005	2006	2007	2008	2009	2010	2011
Pure Alcohol Consumption Per Capita	litres	12.1	11.5	12.0	11.9	12.1	12.1	12.1	11.4	
Wine Consumption Per Capita	litres	11.6	13.1	12.1	12.4	12.2	12.1	12.0	19.4	
Beer Consumption Per Capita	litres	159	160	162	163	147	158	151	144	
Cigarette Consumption Per Capita	cigarettes	2,192	2,243	2,275	2,338	2,345	2,107	2,071	2,028	2,010
Tobacco Consumption Per Capita	grammes	2,591	2,641	2,670	2,735	2,736	2,455	2,413	2,367	
Smokers As Of Population, +15 Years	%		26.8%				24.3%			
Smokers As Of 15-24 Year-Old-Population	%		31.6%				20.1%			
Overweight Population As Of Total	%						37%			
Meat Consumption Per Capita	kg	79.7	85.5	86.6	84.1	85.1	83.5	83.4		
Fish Consumption Per Capita	kg	9.50	9.70	10.00	9.50	9.80	9.80	9.70		
Consumption Of Milk And Dairy Products Per Capita	kg	34.5	27.4	47.1	26.3	24.9	37.5	24.2		
Cheese Consumption Per Capita	kg	13.6	14.5	15.3	15.9	16.4	16.3	16.7		
Oil And Fat Consumption Per Capita	kg	25.0	25.4	25.9	25.7	25.3	25.5	25.5	26.0	
Fruit Consumption Per Capita	kg	80.5	94.1	80.2	70.7	68.9	74.8	76.8		
Consumption Of Vegetables Per Capita	kg	71.0	70.1	78.8	77.0	74.6	77.5	76.1		

Source: World Bank, National Statistical Office, United Nations, OECD, Faostat, Helgi Analytics calculation. For more details, description and explanation of particular indicators, please, visit [www.helgilibrary.com](http://www.helgilibrary.com)

MACROECONOMIC ROUND-UP		2003	2004	2005	2006	2007	2008	2009	2010	2011
GDP	USD bil	95.3	114.0	130.1	148.3	180.5	225.4	197.2	198.9	217.0
GDP Growth	%	3.8%	4.7%	6.8%	7.0%	5.7%	3.1%	-4.5%	2.5%	1.9%
GDP Per Capita	USD	9,336	11,157	12,706	14,446	17,467	21,627	18,806	18,910	20,579
Industrial Production Growth	%	1.6%	10.4%	3.9%	8.3%	10.6%	-1.8%	-13.6%	10.3%	6.9%
Retail Sales Growth	%									
Government Budget Balance (As % Of GDP)	%	-4.9%	-3.2%	-3.7%	-2.4%	-0.7%	-2.2%	-5.8%	-4.8%	-3.1%
Public Debt (As % Of GDP)	%	20%	29%	28%	28%	28%	29%	34%	38%	41%
Unemployment Rate	%	7.8%	8.3%	7.9%	7.1%	5.3%	4.4%	6.7%	7.3%	6.7%
Gross Average Monthly Wage	USD	638	759	847	951	1,124	1,405	1,256	1,289	1,407
Foreign Debt (As % Of GDP)	%	37%	40%	36%	39%	42%	37%	45%	48%	
Imports (As % Of GDP)	%	60%	62%	62%	64%	66%	62%	55%	63%	69%
Exports (As % Of GDP)	%	59%	63%	64%	67%	68%	64%	59%	67%	73%
Current Account Balance (As % Of GDP)	%	-6.3%	-5.2%	-1.3%	-2.5%	-4.4%	-2.1%	-2.5%	-3.8%	-3.0%
Foreign Exchange Reserves (Including Gold)	USD bil	27.0	28.5	29.6	31.5	34.9	37.0	41.6	42.5	40.3
Foreign Exchange Reserves (As % Of Imports)	%	47%	40%	37%	33%	29%	26%	38%	34%	27%
Foreign Direct Investments	USD bil	2.0	5.0	11.6	5.5	10.6	6.6	2.9	6.1	5.4
Foreign Direct Investments (As % Of GDP)	%	2.1%	4.4%	8.9%	3.7%	5.9%	2.9%	1.5%	3.1%	2.5%
Foreign Direct Investments (As % Of CA Deficit)	%	33%	83%	704%	149%	134%	137%	59%	80%	84%
Workers' Remittances, Received (As % Of GDP)	%	0.5%	0.7%	1.1%	1.1%	1.1%	0.9%	1.0%	1.0%	0.8%
Portfolio Investments (As % Of GDP)	%	-1.2%	1.7%	-2.6%	-0.8%	-1.5%	0.0%	4.4%	3.9%	0.2%
Development Assistance (As % Of GDP)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

INFLATION, FOREX & INTEREST RATES		2003	2004	2005	2006	2007	2008	2009	2010	2011
Inflation, CPI (Average)	%	0.1%	2.8%	1.8%	2.5%	2.9%	6.4%	1.0%	1.5%	1.9%
Long-Term Interest Rate (10-Year Gov. Bond Yield)	%	4.1%	4.8%	3.5%	3.8%	4.3%	4.6%	4.8%	3.9%	3.7%
Short-Term Interbank Interest Rate (3-Month)	%	2.3%	2.4%	2.0%	2.3%	3.1%	4.0%	2.2%	1.3%	1.2%
Interest Spread To US\$, 10-Year Gov. Bond	%	0.1%	0.5%	-0.7%	-1.0%	-0.3%	1.0%	1.6%	0.7%	0.9%
Interest Spread To US\$, 3M IBOR	%	1.1%	0.8%	-1.5%	-2.9%	-2.2%	0.8%	1.3%	0.8%	0.8%
FX Rate To USD (Average)	per USD	28.2	25.7	23.9	22.6	20.3	17.0	19.1	19.1	17.7
FX Rate To EUR (Average)	per EUR	31.8	31.9	29.8	28.3	27.8	25.0	26.4	25.3	24.6

Source: National Statistical Office, World Bank, Eurostat, United Nations. For more details, description and explanation of particular indicators, please, visit [www.helgilibrary.com](http://www.helgilibrary.com)

## ABOUT HELGI ANALYTICS

Helgi Analytics is a consulting company based in the Czech Republic. The company mainly provides consultancy in the area of financial services and real estate and focuses primarrily on the region of Central and Eastern Europe.

Helgi Analytics also runs a web application called Helgi Library, which is a database/library offering data and analyses on more than 95% of the world's economy and population. The Library aims to bring interesting statistical data and analyses to a wide audience under affordable conditions. If you wish to get more details, please visit [www.helgilibrary.com](http://www.helgilibrary.com) or contact us at [info@helgianalytics.com](mailto:info@helgianalytics.com).

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