Market Research – Eastern Europe

Fresh flowers in the Czech Republic
Estimado Empresario:

La búsqueda de acuerdos comerciales que nos permitan como país ampliar los escenarios y mercados de exportación, nos reta como PROEXPORT a apoyar en forma directa a los empresarios en sus iniciativas exportadoras, ofreciendo servicios dentro de un modelo del gestión comercial y compartiendo un conocimiento más detallado sobre los mercados y sus oportunidades.

Para lograr lo anterior, PROEXPORT, con inversión de recursos propios y de cooperación técnica no-reembolsables del BID-FOMIN, emprendió una labor de recolección y análisis de información de primera mano en los principales mercados de interés a través de la contratación de consultorías internacionales especializadas en investigaciones de mercados. Los resultados de estos trabajos permitieron analizar y conocer la dinámica comercial de los sectores en los cuales existe un potencial para nuestras exportaciones, así como detallar aspectos de competitividad, información valiosa para la orientación de las iniciativas exportadoras de nuestros empresarios.

La información que contiene este estudio, sobre la dinámica del sector, la demanda y consumo, la situación competitiva de los productos, estructura y características de la comercialización y logística de acceso al mercado, es una contribución e invitación a profundizar y conocer aspectos que nos permitan avanzar en la realización de negocios en escenarios internacionales.

Cordialmente,

[Signature]

Luis Guillermo Plata P.
Presidente PROEXPORT
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1. Introduction

1.1 Introduction

The hereby presented report was elaborated on behalf of PROEXPORT Colombia, according to its instructions and specifications. The main objective of the report is to provide exporters of cut flowers from Colombia with detailed information about the Czech market for cut flowers.

The report is structured as a practical guidebook for the Colombian entrepreneur planning to approach the Czech flower market. It contains production data of flowers in the Czech Republic, the description of the market composition and its characteristics and detailed practical information on the methods of packaging, distribution and transportation of flowers used in the Czech Republic. Every chapter is concluded by a recommendation for potential exporters to the Czech Republic that results from the obtained information. The chapter of recommendations is the final chapter. In the annexes, records and relevant photo material can be found.

Note: All numbers stated in this report are in either EUR or in Czech crowns (CZK). The conversion rate on 20 September 2005 is 29.37 CZK = 1 EUR and its tendency is to change in favour of the Czech crown. Where possible, historical conversion rates have been taken over from sources.

1.2 Methodology

During the elaborations on this report, numerous organizations, institutions and companies were contacted in order to provide detailed information about the potentials of the Czech flower market. Information of the Ministry of Agriculture, Ministry of Trade and Industry, the Czech Statistical office were employed to provide a detailed description of the particular market features. The Czech Association of Florists, as well as numerous entrepreneurs dealing with cut flowers were interviewed. Additional information was acquired via the relevant Czech and foreign web pages and drawn from major daily newspapers (Hospodářské noviny, Lidové noviny).

In spite of intensive data searching, the report is affected by the lack of available and relevant information on this topic. The sector of cut flowers is too narrow to be particularly included in the official surveys and summaries, because it is usually researched together with other sectors or among agricultural activities as a whole.
Not all data of the past years is available yet and could therefore not be used. For example, the official statistical survey of the year 2004 done by the Czech Statistical Office is to be closed by the end of November 2005, and will be published next year. That is the reason why some of data from the Czech Statistical Office are presented only for 2003. Similarly the Ministry of Agriculture provides in its official analysis the data only for 2003, more recent data will be available in October. However, this report contains all the latest data available, some of them were provided on our request, some of them are based on estimations and knowledge of professionals active in the fresh flower market.

The Czech flower market, as well as any agricultural and in general trade activity, is significantly influenced by the Czech accession to the European Union in May 2004. Connected changes and trends are not very clear yet from the available data, in order to analyse the impact of the Czech Republic’s accession, we have to wait for future research data.
2. General sector data

2.1 Current market developments within the specified sector

The consumption of flowers in the Czech Republic is steadily increasing. Czech people spent 7,1 milliard CZK (€ 242 mil.) on flowers in 2003 which is over CZK 200 million (€ 6,8 mil.) more than in 2002. The Czech Republic is the third largest producer of flowers in Eastern Europe (after Poland and Hungary), but domestic production saturates the demand of the market only for 41%. Also the domestic production of flowers and import is slowly increasing, but more in the sector of pot flowers or bed flowers then in the sector of cut flowers. The domestic production of fresh flowers is restricted by climatic conditions, which increase the inputs mainly during the winter, by the lack of modern technologies in greenhouses and by the increasing numbers of exporters, mainly from the Netherlands, Colombia, Thailand and Germany.

2.2 Sector’s participation in total GDP

The sector of fresh flowers is not particularly detailed in national accounts. We can provide only general data or data given for the sector of “agriculture, hunting and forestry,” which includes a wide range of activities.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>In mld EUR</td>
<td>80.5</td>
<td>85.0</td>
<td>91.7</td>
</tr>
<tr>
<td>In EUR per capita</td>
<td>7890</td>
<td>8334</td>
<td>8984</td>
</tr>
<tr>
<td>Index</td>
<td>104,3</td>
<td>105,6</td>
<td>107,9</td>
</tr>
</tbody>
</table>

Source: Czech statistical office

In 2004, the participation of this sector in total GDP was 3% (according to accounts of the Czech statistical office). According to the most recent data of the Ministry of Agriculture, in 2004 the Czech production of fresh flowers amounted to 1,495 mld CZK (EUR 50.9 million), the index 2003/2004 is 105,6. Although the value of domestic production of flowers is increasing, this sector is not supposed to contribute to the overall GDP significantly. The share of agriculture production in general in total GDP is decreasing.

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2.3 Sector’s participation in employment

Similarly, the sector of fresh flowers is not detailed in employment accounts and we can provide only the account of the employment in agriculture generally.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>In total</td>
<td>No of employees</td>
<td>4 764.90</td>
<td>4 733.2</td>
</tr>
<tr>
<td>In agriculture</td>
<td>No of employees</td>
<td>184.2</td>
<td>172.1</td>
</tr>
<tr>
<td>In percentage</td>
<td>3.9</td>
<td>3.6</td>
<td>3.5</td>
</tr>
</tbody>
</table>

Source: Czech statistical office

The characteristic feature of Czech agriculture is the level of wages, which remains far from the wages in industry and the other sectors. The average nominal wage in agriculture in 2004 was € 427.86, which is only 73.9% of the average nominal wage in the industry and 71.7% of the average nominal wage in the national economy.
The number of employees in agriculture is slowly decreasing, while the labour productivity is increasing, as shown by the following chart.

**Figure 2.3.2 The development of the number of employees, wages and the productivity of labour in agriculture (index 1989 = 100)**

![Chart showing the development of the number of employees, wages and the productivity of labour in agriculture](chart.png)

*Source: Czech statistical office*

### 2.4 Developments in production

Domestic production of flowers shows an increase in the last year mainly in the production of pot flowers and bed flowers, while the area of the production of flowers as well as the number of producers is decreasing.

**Figure 2.4.1 Development of the area used for the production of flowers in Czech Republic (in ha)**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Greenhouses</td>
<td>134,1</td>
<td>185</td>
<td>125</td>
<td>125</td>
<td>115</td>
<td>115</td>
<td>115</td>
</tr>
<tr>
<td>Polythene greenhouses</td>
<td>8,4</td>
<td>22</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Hothouses</td>
<td>39,7</td>
<td>11</td>
<td>5</td>
<td>7</td>
<td>9</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td><strong>Sheltered area in total</strong></td>
<td><strong>182,2</strong></td>
<td><strong>218</strong></td>
<td><strong>135</strong></td>
<td><strong>135</strong></td>
<td><strong>129</strong></td>
<td><strong>129</strong></td>
<td><strong>126</strong></td>
</tr>
<tr>
<td>Open area</td>
<td>359</td>
<td>200</td>
<td>105</td>
<td>100</td>
<td>85</td>
<td>85</td>
<td>89</td>
</tr>
</tbody>
</table>

*Source: Czech association of florists*
In 2004 the production of flowers amounted to € 50 million, which meant an increase of 5.1% in comparison to 2003. In the long run the production of cut flowers and foliage will however decrease to the advantage of pot flowers, bed flowers and plant flowers.

Figure 2.4.2 The structure of the domestic production of flowers in 2004


2.5 Sales-, import- and export activities

In 2004 the Czech Republic imported flowers for € 57 million. This was mainly comprised of cut roses (16%), other cut flowers (24%) and pot flowers (24%). The most important suppliers are based in the Netherlands, Colombia, Thailand, Germany and Italy.

In the same year the Czech Republic exported flowers for € 6.4 million, particularly dried and prepared flowers and foliage, pot flowers and cut flowers, which represent ca 50% of total export. The Czech Republic exports primarily to Germany and Slovakia. Despite the fact, that export of flowers from the Czech Republic is increasing, the foreign trade balance is significantly passive. Gradual increase of export cannot compensate quick increase of import.
Figure 2.5.1 The development of foreign trade of flowers (in millions of EUR)

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import</td>
<td>46</td>
<td>49</td>
<td>53</td>
<td>51</td>
<td>57</td>
</tr>
<tr>
<td>Export</td>
<td>2.6</td>
<td>3.0</td>
<td>4.4</td>
<td>5.1</td>
<td>6.4</td>
</tr>
<tr>
<td>Foreign trade balance</td>
<td>-42.9</td>
<td>-45.79</td>
<td>-48.1</td>
<td>-46.0</td>
<td>-50.6</td>
</tr>
</tbody>
</table>


Most of the imported flowers are roses and carnations, which represent 42% of the total value of the import of cut flowers.

Figure 2.5.2 Imports of cut flowers and foliage by the Czech Republic in 2003
(in EUR 1,000/tonnes)

<table>
<thead>
<tr>
<th>Product</th>
<th>Value</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rosa</td>
<td>7,834</td>
<td>1,401</td>
</tr>
<tr>
<td>Dianthus</td>
<td>3,252</td>
<td>916</td>
</tr>
<tr>
<td>Orchids</td>
<td>1,309</td>
<td>191</td>
</tr>
<tr>
<td>Gladioli</td>
<td>79</td>
<td>42</td>
</tr>
<tr>
<td>Dendranthema</td>
<td>2,885</td>
<td>824</td>
</tr>
<tr>
<td>Other fresh cut flowers, amongst others carnations(^1)</td>
<td>11,839</td>
<td>2,423</td>
</tr>
</tbody>
</table>

Source: The Centre for the Promotion of Imports from developing countries (2003)

The share of the Netherlands in total import in EUR (41%) is very significant, the shares of the large exporting countries next to the Netherlands, all remain below a 5% level. The rank of the three biggest importers to the Czech Republic have remained stable in the past years with the Netherlands on top, followed by

\(^1\) Unfortunately the research of the Centre for the Promotion of Imports from developing countries did not include carnations as a specified category. Data on this specific type of flowers independently are also not available from other sources.
Colombia and Thailand. The share of the other countries is varying (significantly in the case of China, Italy or South African Republic).

**Figure 2.5.3 Main importers of cut flowers to the Czech Republic for 2003**

<table>
<thead>
<tr>
<th>Importer</th>
<th>Netto (kg)</th>
<th>EUR (thousands)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Netherlands</td>
<td>4 662 409</td>
<td>21 624</td>
</tr>
<tr>
<td>Colombia</td>
<td>561 762</td>
<td>2 056</td>
</tr>
<tr>
<td>Thailand</td>
<td>127 275</td>
<td>588</td>
</tr>
<tr>
<td>Ecuador</td>
<td>109 466</td>
<td>763</td>
</tr>
<tr>
<td>Germany</td>
<td>100 546</td>
<td>403</td>
</tr>
<tr>
<td>Slovakia</td>
<td>86 909</td>
<td>588</td>
</tr>
<tr>
<td>Israel</td>
<td>57 026</td>
<td>438</td>
</tr>
<tr>
<td>Kenya</td>
<td>52 573</td>
<td>353</td>
</tr>
<tr>
<td>Turkey</td>
<td>16 338</td>
<td>78</td>
</tr>
<tr>
<td>China</td>
<td>15 687</td>
<td>37</td>
</tr>
<tr>
<td>Poland</td>
<td>12 892</td>
<td>28</td>
</tr>
<tr>
<td>South African Republic</td>
<td>12 236</td>
<td>81</td>
</tr>
<tr>
<td>Spain</td>
<td>11 342</td>
<td>46</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>11 180</td>
<td>75</td>
</tr>
</tbody>
</table>

*Source: The Czech statistical office*

**Figure 2.5.4 Main importers of cut flowers to the Czech Republic for 2004**

<table>
<thead>
<tr>
<th>Importer</th>
<th>Netto (kg)</th>
<th>EUR thousands</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Netherlands</td>
<td>5 268 639</td>
<td>23 251</td>
</tr>
<tr>
<td>Colombia</td>
<td>519 287</td>
<td>2 139</td>
</tr>
<tr>
<td>Thailand</td>
<td>114 323</td>
<td>523</td>
</tr>
<tr>
<td>Slovakia</td>
<td>103 314</td>
<td>553</td>
</tr>
<tr>
<td>Ecuador</td>
<td>85 643</td>
<td>649</td>
</tr>
<tr>
<td>Kenya</td>
<td>81 867</td>
<td>377</td>
</tr>
<tr>
<td>Germany</td>
<td>60 741</td>
<td>135</td>
</tr>
<tr>
<td>Israel</td>
<td>45 754</td>
<td>220</td>
</tr>
<tr>
<td>Poland</td>
<td>23 620</td>
<td>96</td>
</tr>
<tr>
<td>Etiopia</td>
<td>19 893</td>
<td>48</td>
</tr>
<tr>
<td>Turkey</td>
<td>17 219</td>
<td>81</td>
</tr>
<tr>
<td>Spain</td>
<td>15 791</td>
<td>44</td>
</tr>
<tr>
<td>Italy</td>
<td>14 729</td>
<td>99</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>9 605</td>
<td>63</td>
</tr>
</tbody>
</table>

*Source: The Czech statistical office*

The amount of Czech export of flowers is not comparable with the import. The majority of export covers the export to the near-by countries like Germany, Slovakia, Austria and Poland. The export to the other countries is not significant.

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### 2.5.5 The export of flowers by the Czech Republic in 2003

<table>
<thead>
<tr>
<th>Country</th>
<th>Netto (kg)</th>
<th>EUR (ths.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>108,958</td>
<td>153</td>
</tr>
<tr>
<td>Slovakia</td>
<td>33,721</td>
<td>144</td>
</tr>
<tr>
<td>Austria</td>
<td>335</td>
<td>6</td>
</tr>
<tr>
<td>Poland</td>
<td>195</td>
<td>0</td>
</tr>
<tr>
<td>Taiwan</td>
<td>14</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>143,223</strong></td>
<td><strong>304</strong></td>
</tr>
</tbody>
</table>

Source: The Czech statistical office

### 2.5.6 The export of flowers by the Czech Republic in 2003

<table>
<thead>
<tr>
<th>Country</th>
<th>Netto (kg)</th>
<th>EUR (ths.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slovakia</td>
<td>77,852</td>
<td>263</td>
</tr>
<tr>
<td>Germany</td>
<td>49,936</td>
<td>57</td>
</tr>
<tr>
<td>Poland</td>
<td>62</td>
<td>1</td>
</tr>
<tr>
<td>USA</td>
<td>20</td>
<td>1</td>
</tr>
<tr>
<td>Taiwan</td>
<td>9</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>127,879</strong></td>
<td><strong>323</strong></td>
</tr>
</tbody>
</table>

Source: The Czech statistical office

### 2.6 Available data about the sub-sectors

Considering the sector of cut flowers, the production of carnations, gerberas, and roses is the most important. The increase in production is observed in the sector of seasonal flowers, which do not necessarily have to be planted in greenhouses, for example tulips, gladiolus, dahlias and narcissus.

### 2.6.1 The structure of production of cut flowers in 2001 (in thousands EUR)

<table>
<thead>
<tr>
<th></th>
<th>Production</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carnations</td>
<td>1,278</td>
<td>32.27%</td>
</tr>
<tr>
<td>Gerberas</td>
<td>1,076</td>
<td>27.18%</td>
</tr>
<tr>
<td>Roses</td>
<td>733</td>
<td>18.51%</td>
</tr>
<tr>
<td>Chrysanthemum</td>
<td>538</td>
<td>13.60%</td>
</tr>
<tr>
<td>Orchids</td>
<td>36</td>
<td>0.91%</td>
</tr>
<tr>
<td>Other cut flowers</td>
<td>267</td>
<td>6.73%</td>
</tr>
<tr>
<td>Dried flowers</td>
<td>32</td>
<td>0.80%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,960</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

2.7 Recommendations

There are a lot of factors that disadvantage the production of flowers in the Czech Republic: first of all the climatic conditions, that cause the decreasing quality of flowers and increasing inputs in cultivation during the winter. Furthermore the low solvability of agriculture enterprises, the elderliness of greenhouses and other facilities (the average age of Czech greenhouses is 35 years) and the wide range of yearly exported flowers of good quality and for relatively low prices. In the long run it can be observed, that the production of fresh flowers is decreasing in favour of the production of pot and bed flowers, while the consumption of cut flowers is still increasing and is more and more saturated by import.

If investments will be decreased, this may lead to the liquidation of the Czech flower production, especially in the case of flowers that have to be cultivated in greenhouses. For the Czech producers of cut flowers it is necessary to apply high-tech production methods, which can enable them to produce products of the highest quality, to concentrate the production in the bigger enterprises (similar to the situation in the Netherlands, Germany and Denmark a few years ago) and to automatize it. The coming years (significantly influenced by the accession to the EU in 2004, which has not been projected in recent figures yet) will show if Czech enterprises are willing to apply such investments and changes or that increasing consumption of cut flowers will be covered only by import.

If however the Czech flower production will further decrease, this might open up opportunities for Colombian exporters. Though these exporters will face though competition from, especially, the Netherlands, a country which has a vast interest in the Czech flower market.
3. Market composition and characteristics

3.1 Market size

Figure 3.1.1 Czech national flower production (thousands of EUR)

<table>
<thead>
<tr>
<th>Year</th>
<th>Value in thousands EUR</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td>38732</td>
<td>100.0</td>
</tr>
<tr>
<td>2002</td>
<td>43105</td>
<td>111.3</td>
</tr>
<tr>
<td>2003</td>
<td>47411</td>
<td>122.4</td>
</tr>
<tr>
<td>2004</td>
<td>49982</td>
<td>129.0</td>
</tr>
</tbody>
</table>

Source: Czech statistical office, Customs office

Czech national production has been growing steadily over the past few years, almost equalling € 50 million in 2004.

Figure 3.1.2 World Flower Production 2002

<table>
<thead>
<tr>
<th>Country</th>
<th>Total production area in ha (indoor and outdoor)</th>
<th>Value in Euros (millions)</th>
<th>No. of companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>1,982 (a)</td>
<td>240 (a)</td>
<td>1,357 (a)</td>
</tr>
<tr>
<td>Belgium</td>
<td>1,562</td>
<td>263</td>
<td>2,963</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>215</td>
<td>43</td>
<td>3,000</td>
</tr>
<tr>
<td>Denmark</td>
<td>444</td>
<td>354</td>
<td>1,054</td>
</tr>
<tr>
<td>Finland</td>
<td>176</td>
<td>76</td>
<td>598</td>
</tr>
<tr>
<td>France</td>
<td>6,628</td>
<td>956</td>
<td>7,663</td>
</tr>
<tr>
<td>Germany</td>
<td>7,056</td>
<td>1,174</td>
<td>11,187</td>
</tr>
<tr>
<td>Greece</td>
<td>990</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Guernsey</td>
<td>126</td>
<td>53</td>
<td>187</td>
</tr>
<tr>
<td>Hungary</td>
<td>600</td>
<td>95</td>
<td>3,000 (a)</td>
</tr>
<tr>
<td>Ireland</td>
<td>300</td>
<td>19</td>
<td>n/a</td>
</tr>
<tr>
<td>Italy</td>
<td>0,463</td>
<td>1,825</td>
<td>n/a</td>
</tr>
<tr>
<td>Netherlands</td>
<td>8,363</td>
<td>3,642</td>
<td>7,751</td>
</tr>
<tr>
<td>Norway</td>
<td>118</td>
<td>129</td>
<td>690</td>
</tr>
<tr>
<td>Poland</td>
<td>705</td>
<td>186</td>
<td>n/a</td>
</tr>
<tr>
<td>Portugal</td>
<td>240</td>
<td>n/a</td>
<td>704</td>
</tr>
<tr>
<td>Spain</td>
<td>7,617</td>
<td>345</td>
<td>6,454</td>
</tr>
<tr>
<td>Sweden</td>
<td>209</td>
<td>112</td>
<td>864</td>
</tr>
</tbody>
</table>

Source: Floraculture International

In 2002 the most recent official data on the Czech flower production was recorded. Total production in that year amounted to 43 million EUR and was grown on 215 ha. In total, 3,000 Czech companies were active in the flower

---

2 Total production in 2003 and 2004 is based on estimates made by the Czech customs office
Market Researches in Eastern Europe

growing market. In comparison; in that very same year 450 companies were growing flowers in Colombia, but their total production value was over 540 million EUR and total acreage amounted to 5.906 ha. This shows that the Czech flower market is quite spread out over various small companies with relatively small growing fields.

The production of the various types of cut flowers is given below.

Figure 3.1.3 Structure of production of cut flowers in 2001 (in thousands EUR)

<table>
<thead>
<tr>
<th>Production</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carnations</td>
<td>12780</td>
</tr>
<tr>
<td>Gerberas</td>
<td>1076</td>
</tr>
<tr>
<td>Roses</td>
<td>733</td>
</tr>
<tr>
<td>Chrysanthemum</td>
<td>538</td>
</tr>
<tr>
<td>Orchids</td>
<td>36</td>
</tr>
<tr>
<td>Other cut flowers</td>
<td>267</td>
</tr>
<tr>
<td>Dried flowers</td>
<td>32</td>
</tr>
<tr>
<td><strong>In total</strong></td>
<td><strong>3873</strong></td>
</tr>
</tbody>
</table>


3.2 Analysis of the apparent consumption dynamics

Apparent consumption of flowers in the Czech Republic is displayed in the graph below. It shows that the export of flowers from the Czech Republic is very small compared to the national flower supply. Domestic consumption is quite dependent on import; 53% of domestic flower consumption in 2004 came from abroad and this number is still on the rise.

Figure 3.2.1 Apparent consumption dynamics of flowers in the Czech Republic
(in million EUR)

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic production</td>
<td>38.7</td>
<td>43.1</td>
<td>47.4</td>
<td>50.0</td>
</tr>
<tr>
<td>Import</td>
<td>48.8</td>
<td>52.5</td>
<td>51.0</td>
<td>56.9</td>
</tr>
<tr>
<td><strong>Total supply</strong></td>
<td><strong>87.5</strong></td>
<td><strong>95.6</strong></td>
<td><strong>98.4</strong></td>
<td><strong>106.9</strong></td>
</tr>
<tr>
<td>Export</td>
<td>3.0</td>
<td>4.4</td>
<td>5.1</td>
<td>6.3</td>
</tr>
<tr>
<td><strong>Apparent consumption</strong></td>
<td><strong>84.5</strong></td>
<td><strong>91.2</strong></td>
<td><strong>93.3</strong></td>
<td><strong>100.6</strong></td>
</tr>
</tbody>
</table>

Source: Custom statistics, The Czech association of florists, The Ministry of Agriculture

18 Proexport Colombia
3.3 Governmental plans and programs

There is no special governmental program considering the support of export or the support of the flower market. As a member of the European Union, the Czech Republic regulates its flower market by common EU law, to a large extent by Regulation 316/68.

The domestic production of flowers remained ignored by the numerous governmental programmes supporting Czech agricultural production and this fact provoked a lot of complaints by the small flower producers, who have to invest in modernization of the cultivation facilities. According to the official proclamations of Czech government, the modernization of greenhouses is not the priority of the Czech agricultural policy.

3.4 Demand in the market

While the Western European flower market in general is considered to be saturated and the demand for cut flowers is stable, in the Czech Republic as well as in Hungary and other Eastern European countries, the consumption of flowers is still increasing. According to the Flower Council of Holland, the consumption of flowers in the European Union will increase until 2007 on average by 12,9% for cut flowers and 11,4% for pot flowers.

![Figure 3.4.1 The estimations of flower consumption increase for the period 2002 – 2007](image)

<table>
<thead>
<tr>
<th></th>
<th>Cut flowers</th>
<th></th>
<th>Pot flowers</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sale in 2002</td>
<td>Increase</td>
<td>Sale in 2002</td>
<td>Increase</td>
</tr>
<tr>
<td></td>
<td>(EUR mil)</td>
<td>(%)</td>
<td>(EUR mil)</td>
<td>(%)</td>
</tr>
<tr>
<td>Germany</td>
<td>3090</td>
<td>0,00%</td>
<td>3734</td>
<td>10,50%</td>
</tr>
<tr>
<td>UK</td>
<td>2400</td>
<td>27,90%</td>
<td>741</td>
<td>21,70%</td>
</tr>
<tr>
<td>Ireland</td>
<td>119</td>
<td>34,10%</td>
<td>42</td>
<td>34,10%</td>
</tr>
<tr>
<td>France</td>
<td>1959</td>
<td>16%</td>
<td>1166</td>
<td>5,10%</td>
</tr>
<tr>
<td>Italy</td>
<td>1905</td>
<td>10,50%</td>
<td>557</td>
<td>5,10%</td>
</tr>
<tr>
<td>Spain</td>
<td>776</td>
<td>34,10%</td>
<td>418</td>
<td>40,60%</td>
</tr>
<tr>
<td><strong>Czech Republic</strong></td>
<td><strong>97</strong></td>
<td><strong>48,90%</strong></td>
<td><strong>52</strong></td>
<td><strong>40,90%</strong></td>
</tr>
<tr>
<td>Hungary</td>
<td>126</td>
<td>48%</td>
<td>66</td>
<td>54,90%</td>
</tr>
</tbody>
</table>

Source: [www.zahradaweb.cz](http://www.zahradaweb.cz), according to the Flower Council of Holland

The increasing demand of the Czech flower marked is caused by the bigger attention that Czech people pay to their working and housing environment but also by the wide offer and availability of flowers, including exotic ones, for year round (until 1989 Czech market was restricted to Eastern European goods).
Figure 3.4.2 The development of the consumption of flowers in the Czech Republic

<table>
<thead>
<tr>
<th>Year</th>
<th>The consumption of flowers in consumption prices per capita (in EUR)</th>
<th>Increase (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>4.21</td>
<td>10</td>
</tr>
<tr>
<td>1996</td>
<td>4.43</td>
<td>5</td>
</tr>
<tr>
<td>1997</td>
<td>5.76</td>
<td>30</td>
</tr>
<tr>
<td>1998</td>
<td>6.08</td>
<td>6</td>
</tr>
<tr>
<td>1999</td>
<td>7.20</td>
<td>18</td>
</tr>
<tr>
<td>2000</td>
<td>7.55</td>
<td>5</td>
</tr>
<tr>
<td>2001</td>
<td>8.52</td>
<td>11</td>
</tr>
<tr>
<td>2002</td>
<td>9.10</td>
<td>10</td>
</tr>
</tbody>
</table>

Source: The Ministry of Agriculture

Czechs spent € 99 million on flowers in 2003. The offer of flowers is quite large, but is sold for a relatively high price. As graph 3.3.3 shows, Czech consumption of flowers is therefore approximately € 9 per head of the population, which is much lower than in other EU memberstates. Compared to other Eastern European countries such as Poland, the level of consumption is however average.
It is not unlogical that the Czech average is much lower than in for example the Netherlands; the average wage of a Czech is € 497 per month, four times less than that of an average Dutchman.

The demand for particular flowers (for example chrysanthemas) is significantly seasonal. In summer months the consumption of cut flowers declines, with the exception of roses and gerberas, which are bought continuously during the year at changing prices.²

² For more information on prices, see section 4.7
Flowers in the Czech Republic are bought mainly as gifts – for birthdays, name days, Valentine’s day (celebrated more by young people, who usually buy a mono-bunch consisting of one piece of red flower, usually a rose) and Mothers’ day, which is celebrated on the second Sunday in May. As a gift, mainly among relatives, cut flowers are replaced by pot flowers and this trend is increasing. Demand for pot flowers has been significantly increasing, as can be seen in the following graph.

**Figure 3.4.4 Consumption of flowers**

| The structure of consumption of flowers in the Czech Republic (in CZK) |
|---|---|---|---|---|---|---|
| 60% | 50% | 40% | 30% | 20% | 10% | 0% |
| Osiva | Dryed flowers | Bulb flowers | Foliage flowers | Bed flowers | Pot flowers | Cut flowers |
| 1999 | 2002 |

*Source: The Ministry of Agriculture*

Other occasions for buying flowers are All Saints’ Day (at the beginning of November), when people decorate the graves of their relatives with mainly chrysanthemums or artificial flowers. Women’s day (March 8th), - celebrated with one piece of red carnation for every women - is now celebrated rarely, because of its reputation influenced by forced celebrating during the communistic regime (until 1989). Weddings are connected with flowers very strongly, because it is necessary to decorate not only spouses, but also the place of the wedding ceremony and celebration. Czech people do not organize baptisms neither christening parties (because of the big share of atheists amongst the Czech population).
The structure of consumption of cut flowers in the Czech Republic

Source: The Centre for the Promotion of Imports from Developing Countries (2003)

The delivery of flowers directly to the house remains marginal, because of the newness and expensiveness of such services.

### 3.5 Recommendations

The consumption of cut flowers is growing faster in the accessed countries than in the “old” members of the European Union. In the Czech Republic there is potential for a further increase in sales, since the flower business keeps on developing each year. However, reaching the income level of the EU-15 and comparable consumption levels is still a far cry. For example, buying flowers for own consumption remains limited; flowers are bought mainly for special occasions, as they are too expensive for the average costumer. The most common occasions on which flowers are bought as a gift are birthdays, name days or funerals. Nevertheless forecasted growth is considerable. Flowers are mainly bought as a gift on special occasions.
4. Competition analysis

4.1 Main trademarks available in the market

There are no particular trademarks on the Czech flower market that can be distinguished. Czech customers value features like freshness and type species more than for example the specific origin of flowers. The popularity of exotic flowers is slowly increasing. Roses, carnations, gerberas and lily belong to the most popular cut flowers.

According to the analysis of Tulipa Praha only a small amount of tulips is grown in the Czech Republic, about 95% is imported. Most of the cut flowers come from the Netherlands, Latin-American-, African- and Asian countries. However, they are transported to the Czech Republic through the Netherlands.

According to the Florist Union in Olomouc, the production of cut flowers is increasing. Carnations are the most desirable flower because of various species and its low price. In the Czech Republic, flowers used for commerce are grown in floricultural companies, especially in green-houses or covered areas (plastic green-houses or hotbeds). The equipment of Czech floricultural companies is below average nowadays as a result from low investments in this sector. For instance a Czech enterprise dealing with floriculture needs twice more workforce than the same one in the European Union. Czech floriculture needs large modernizations in order to decrease the operating costs and to compete with international competitors.

There are two contradictory tendencies in Czech floriculture. Firstly, an increase in production costs, and secondly, a lack of competitive advantage in comparison with imported flowers. However, an increasing demand for cut flowers has caused an increase in domestic production as well as higher import.

According to the Florist Union in Olomouc, there has been mentioned a huge decline in the amount of growing areas since 1988 (greenhouses from 185 hectares to 115 hectares, polythene greenhouses from 25 hectares to 5 hectares and hotbeds from 11 hectares to 6 hectares). However, since 2000 the growing area of green-houses and polythene green-houses has not changed, only the area of hotbeds has changed for 3 hectares.


Proexport Colombia
Local growers in the Czech Republic:

As mentioned in chapters 2.4, 2.7 and 3.2., the number of flower growers in the Czech Republic is small. In chapter 3.2 the figure shows that the imports exceed the export of cut flowers. The most important local Czech growers are.

1. AGRO BRNO - TUŘANY

The horticultural production of AGRO Brno-Tuřany a.s. is the largest one in the Czech Republic. AGRO Brno-Tuřany a.s. is a joint stock company offering services in the horticultural production, agricultural production, mining of gravel sand, ground-work and foundry. Horticultural production holds a dominant position in the overall activities pursued by the company, with a 55% share in the annual sales posted by the company.

Contact:
AGRO Brno-Tuřany, a.s.
Dvorecká 31, 620 00 Brno
email: agro@agro-tuřany.cz
http://www.agro-tuřany.cz/

HORTICULTURAL PRODUCTION
Kaštanová 123
620 00 Brno - Brněnské Ivanovice
Pavel Rubeš – horticultural production manager
Tel.: +420 545 220 014
Tel./Fax: +420 545 232 635
e-mail: str080_hosp@agro-tuřany.cz

Centre 010 – Horticulture
Staré náměstí 27 a
Ing. Jana Wagnerová – centre manager
Tel.: +420 543 253 124
Tel./Fax: +420 543 210 785
e-mail: str010@agro-tuřany.cz

Production and consultancy:
- Cut gerbera + plants
- Pot blooming ornamental plants and evergreen species
- Seedlings of geraniums and other balcony plants
- Seedlings of poinsettias and impatiens
Centre 040 – ORNAMENTAL, FRUIT AND ROSE NURSERY
Kaštanová 123
620 00 Brno-Brněnské Ivanovice
Zdeněk Pferovský - centre manager
Tel.: +420 545 232 533
     +420 545 220 013
Fax: +420 545 229 815
e-mail: str040@agro-turany.cz

Production:
- Broadleaves plants and shrubs
- Coniferous plants and shrubs
- Climbing plants
- Moor plants
- Fruit trees
- Special fruit species
- Rose bushes and trees

2. Jižní Morava, a.s.

Jižní Morava, a.s. produces about 1,500 tons of cut flowers per year. This company produces mainly gerberas and carnations and also some roses.

Contact:
Jižní Morava, a.s.
Tvrdonice 701
CZ 691 53 Tvrdonice
e-mail: jizni.morava@iol.cz
Web: http://www.asjmorava.cz
Sales department of flowers: Dagmar Vališová - +420 519 339 492

3. Černý

This firm specializes on breeding Petunia and Begonia and it has been producing seeds from 1928. Amongst its more than 100 new and original varieties, the company also produces gerberas, carnations and roses.

Contact:
Černý
Husova 139
551 01 Jaroměř
Czech Republic
http://www.cernyseed.cz/
4. **Floracentrum Jiřina**

Contact:
Floracentrum Jiřina
Riegrova 18
301 11 Plzeň
http://www.plzen-info.cz/firma/floracentrum-jirina/

5. **Dvůr Loucká**

This company specializes in fruit trees and roses, it offers over 20 species of roses.

Contact:
Mgr. Václav Chroust
Loucká 159
41119 Mšené-lázně
http://www.dvur-loucka.cz/katalog.htm

### 4.2 Features of the commercialized products

Flowers sold at florist shops are usually arranged in floral tributes or sold separately, not so much in bouquets. The floral tributes are usually placed in little baskets. Separately sold flowers, such as roses, mainly have large stems. Short stemmed roses, which are quite popular in Western Europe, are non-existent in the Czech Republic. Czechs prefer quite vivid colours over more neutral colors like white or pale yellow. The most popular colours are bright red, pink and purple. Some flowers are even artificially coloured to give them a bright, colourful appearance.

For photo material of packaging and transportation of cut flowers, please see the annexes.

### 4.3 Marketing and advertising strategies

One of the major critical success factors for exporters of cut flowers to the Czech Republic is the attention to customer requirements and the ability to maintain good relationships with their European business partners. Sales promotion revolves around developing and expanding these customer relations and thereby maintaining and increasing sales volume.
Communication

It is advisable to commence with communication measures, which only require a small amount of planning and co-ordinating, such as revising the company's standard printed matter:
- Standardise all printed paper used outside the company (letterheads, visiting cards, fax form, etc.)
- A brochure of your company (including photos of production sites and produce) can be useful for promoting new contacts and sales.
Constant, prompt and reliable communication is a vital prerequisite for maintaining a long-term business relationship with your customers. If possible, smaller firms should also try to be reachable by (mobile) phone at office hours.

Internet

As a source of information and means of communication, Internet is generally considered to have many opportunities for companies in developing countries. The main advantages of the Internet are:
- Low cost of communication;
- Fast delivery of information;
- Independence of distance and timeline;
- Multimedia possibilities.
Besides one-to-one communication through the use of E-mail, Internet offers opportunities for presentations, (market) research, distribution, sales and logistical improvements. If your target group consists of importers/growers in overseas countries, you can advertise for (new) customers on your Internet site, showing your company, product range and indicating the production circumstances.

Trade fairs

Visiting or even participating in a trade fair abroad can be an efficient tool for communicating with prospective customers. It provides more facilities to transmit the message than any other trade promotional tool. It can also be an important source of information on market developments and interesting varieties.
Important motives for companies visiting trade fairs are:
- Establishing contacts with potential customers;
- Orientation on the Czech and European market;
- Gathering information on specific subjects;
Although significant costs are involved, actually participating in a trade fair could be interesting for a number of companies to meet, for example, European companies interested in setting up production facilities in tropical regions. One of the major advantages of participating yourself in a trade fair is the ability to present your company and products in a more extensive way (3-D presentation, company video, and product displays).
Floricultural trade fairs are organised in many European Union countries. The most relevant fairs for exporters of cut flowers and foliage are listed in the box below.

Figure 4.3.1 Main Czech and European trade fairs

<table>
<thead>
<tr>
<th>Trade fair</th>
<th>Place</th>
<th>Frequency and time</th>
<th>Subject</th>
<th>Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLORA Olomouc</td>
<td>Olomouc, Czech Republic</td>
<td>21. – 24. 04. 2005 (twice a year)</td>
<td>Trade fair for flowers, vegetables, decorative flowers and florists’ equipment</td>
<td><a href="http://www.flora-ol.cz">www.flora-ol.cz</a></td>
</tr>
<tr>
<td>Florissimo</td>
<td>Dijon, France</td>
<td>10 March - Sunday 20 March 2005 (every 4 years)</td>
<td>International exhibition for exotic flowers and plants</td>
<td><a href="http://www.dijon-congrexpo.com">www.dijon-congrexpo.com</a></td>
</tr>
<tr>
<td>Flormart-Miflor</td>
<td>Padova, Italy</td>
<td>February 2005 (semiannual)</td>
<td>International trade fair for cut flowers, plants, equipment and florists’ requisites.</td>
<td><a href="http://www.flormart.it">www.flormart.it</a></td>
</tr>
<tr>
<td>Iberflora</td>
<td>Valencia, Spain</td>
<td>October 2005 (annual)</td>
<td>Garden and horticultural technology trade fair</td>
<td><a href="http://www.feriavalencia.com/iberflora">www.feriavalencia.com/iberflora</a></td>
</tr>
<tr>
<td>Four Oaks Trade Show</td>
<td>Cheshire, United Kingdom</td>
<td>September 2005</td>
<td>Horticultural trade fair</td>
<td><a href="http://www.fouroaks-tradeshow.com">www.fouroaks-tradeshow.com</a></td>
</tr>
</tbody>
</table>
4.4 Participation in the market and segments that are served

There is no official data published on this detailed subject. However from personal interviews in various flower shops, the following information could be obtained.

<table>
<thead>
<tr>
<th>Consumers</th>
<th>Who buy flowers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men 18-80 years</td>
<td>12%</td>
</tr>
<tr>
<td>Women 18-35 years</td>
<td>36%</td>
</tr>
<tr>
<td>Women 35-80 years</td>
<td>49%</td>
</tr>
<tr>
<td>Children &lt; 18 years</td>
<td>3%</td>
</tr>
</tbody>
</table>

From these statistics it can be concluded that women are by far the biggest flower consumers, especially women in the category 35 years and older.

Flowers are mostly bought for celebrational purposes, such as name days, Valentine’s day, anniversaries etc. and less, compared to Western countries, as a personal treat.

4.5 Quality of the product

The Czechs value the quality of the products they buy very highly. They are known as people who are very close to their family and enjoying spending time with them both inside and in the surrounding of their houses. They take great pride in their houses and in its decoration. Therefore they are very fond of buying fresh cut flowers to display in their homes, but because of the relatively low disposable income this is however not possible for everyone.

This means that when Czechs buy flowers they want strong flowers, which will last for a long time. They usually buy them when the flower is still closed, so it will eventually bloom inside their homes.

4.6 Expansion plans

Every year, the consumption of cut flowers in the Czech Republic increases. Expenditures for fresh cut flowers comprise half of the total expenditure on flowers. The Czech agricultural sector has no specific connection with growing fresh flowers, and because of this a lot of cut flowers are imported. Expansion plans therefore not exist amongst Czech producers.

The market trend shows that demand for fresh flowers and plants will increase in the Czech Republic as well as world-wide over the coming years, both in the traditional consuming countries and in new economically growing countries. The
Market share of non traditional outlets will increase although not as fast as in the vegetable and fruit sector, where groceries lost their position nearly totally. Still these non-traditional outlets are the fastest growing segments in consumption. More and more fresh flowers and plants are used as intermediate products in bouquets and scales in combination with hardware.

The improving infrastructure, the EU regulations, growing market shares of non traditional outlets, better communication methods and more professional wholesalers will make competition higher and lead to a shake out amongst wholesalers. Wholesalers will specialize in functions. Fewer wholesalers will have higher turnovers. Vertical integration will not lead to disappearing of the wholesale function and will, at least for the short future, lead to better exchange of demand and supply information, and strengthen the current shake out trend. A modern communication system helps trade but does not replace functions.5

4.7 Pricing strategy

The consumer prices of cut flowers are still increasing; in the last 10 years they increased by 100%. In 2002 the increase of prices slowed down, but from April 2004, when the value added tax for fresh flowers changed from 5% to 19%, we can again observe the increase of prices together with the moderate slowdown of sale. Unfortunately, for the recent development of the prices of cut flowers we do not have sufficient evidence. No relevant institution (Czech Statistical Office, The Ministry of Agriculture, The Czech Associations of Florists) collects this type of data continuously, usually they do only periodical surveys every couple of years.

Therefore the data shown here are for 2002 and 2003 as well as the most recent evidence on prices for carnations (until May 2005), provided by the Czech Statistical Office on our request. Because of the lack of data on other flowers more recent information cannot be given.

Figure 4.7.1 The development of the consumer prices of cut flowers (EUR/piece)

<table>
<thead>
<tr>
<th></th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carnation</td>
<td>0.52</td>
<td>0.53</td>
<td>0.56</td>
<td>0.57</td>
</tr>
<tr>
<td>Rose</td>
<td>1.24</td>
<td>1.31</td>
<td>1.38</td>
<td>1.39</td>
</tr>
<tr>
<td>Gerbera</td>
<td>x</td>
<td>x</td>
<td>X</td>
<td>0.97</td>
</tr>
<tr>
<td>Chrysanthemum</td>
<td>x</td>
<td>x</td>
<td>X</td>
<td>1.03</td>
</tr>
</tbody>
</table>

Source: The Czech Statistical Office


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For some types of flowers a clear seasonal pattern exists. Prices are at their lowest during the summer period, when production in Europe reaches its peak and highest in November and December.

During the winter months in general the prices of flowers are increasing because of the biggest inputs into their cultivation. This fluctuation is not significant for carnations or orchids, which have a stable price during the whole year. Remarkably the prices of roses and gerberas fluctuate quite a bit, because of the stable popularity of these flowers, which remains equal, even during summer, when the consumption of cut flowers decreases in general.

The seasonal variability of prices is influenced by many factors: by the type of flowers, their source, the season etc.

---

6 The conversion rate on 20 September 2005 is 29,37 CZK = 1 EUR
The prices of imported flowers reflect the auction prices and their seasonal variability – they increase mainly in the periods like Valentine’s Day, Mother’s day, Eastern etc. The accession of the Czech Republic to the EU brought many important changes, also for the pricing strategy. It can be expected, that prices of cut flowers will increase in the next years.

7 The conversion rate on 20 September 2005 is 29,37 CZK = 1 EUR
4.8 Segmentation of enterprises by sectors and its categorization

[Map of the Czech Republic with legend]

Legend
- Wholesale ★
- Retail ★
- Others ★

The biggest concentration of wholesalers is around Prague and other big cities (Brno, Ostrava, Olomouc, Plzeň, Liberec).

Retailers are equally spread over the entire country.
4.9 Recommendations

Although there are no particular trade marks in the market, there are some trends visible in the trade of cut flowers in the Czech Republic. According to a survey, the most popular flowers are roses, carnations, gerberas and lilies. The purchase of cut flowers is definitely increasing.

It is appropriate to recommend potential exporters a right marketing strategy, which is done in chapter 4.3. The most effective way of advertising is attending a trade fair. There are several fairs in the Czech Republic and in the whole European Union. The biggest wholesalers usually visit not only the trade fairs in their country, but also in neighbouring countries. Internet is the second most used way to promote and sell cut flowers.

The consumer prices of cut flowers still increase; in the last 10 years they increased by 100%. Prices are at their lowest during the summer period, when production in the Europe reaches its peak and highest in November and December. The seasonal variability of prices is influenced by many factors: by the type of flowers, their source, the season etc. New increases in prices are expected in the future.

Potential opportunities for exporters most likely with the growth of the Czech disposable income, which is growing with an annual 5 -10 %. Czechs like to spend a lot of time in and about their house with their family and friends and therefore are willing to spend money on decorations such as fresh cut flowers. This market will therefore most definitely see a strong growth in the years to come.
5. **Distribution channels**

5.1 *Distribution channels*

In general, cut flowers and foliage from developing countries enter the European market either
1) via one of the Dutch auctions;
2) via an agent;
3) via an importer / wholesaler; or
4) directly via a Czech retail chain.

*Figure 5.1.1 Distribution network of the cut flower trade in the European Union*

*Source: Center for the Promotion of Imports from developing countries*

*Proexport Colombia*
A.D. 1) Auctions

Auctions are wholesale markets created by growers to market their products. The first flower auctions were set up in the early 20th century in The Netherlands. Nowadays, there are about 10 flower auctions in Europe, 4 of which are in the Netherlands.

Of the flower auctions in the EU, three are of particular interest to exporters from developing countries. These three auctions also have their own import departments which can facilitate foreign suppliers with necessary support when supplying the auction:

- Aalsmeer Flower Auction (VBA): Internationally oriented auction with an annual turnover of over € 1.6 billion, of which € 995 cut flowers (2003 figures).

Bloemenvelling Aalsmeer (VBA)
Legmeerdijk 313
1431 GB Aalsmeer, The Netherlands
Phone: +31 (0)297 -393939
Fax : +31 (0)297 - 390039
E-mail : info@vba.nl

- FloraHolland: Internationally oriented auction with 5 branches in Naaldwijk, Rijnsburg, Bleiswijk, Venlo, and Eelde in The Netherlands. In 2003, total turnover amounted to € 1.9 billion.

Middel Broekweg 29
Postbus 220
2670 AE Naaldwijk, The Netherlands
Phone: +31 (0)174 63 33 33
Fax: +31 (0)174 63 22 22
E-mail: Naaldwijk@floraholland.nl

- NBV/UGA: Germany's leading sales organisation and auction with an annual turnover of € 715 million in 2003.

NBV/UGA GmbH
Veilingstr. A1
47638 Straelen-Herongen, Germany
Phone: +49 (0) 2839 - 59 00
Fax: +49 (0) 28 39 - 59 1997
E-mail: marketing@nbv-uga.de

The other auctions are mainly oriented towards the marketing of local production.
It is important to understand the importance of Dutch auctions as an international distribution hub for products from developing countries. Czech importers are especially oriented to the Aalsmeer Flower Auction, which is on of the most important distribution channels of fresh flowers to the Czech Republic.

A.D. 2) Agents

Handling imports has never been a core-business function of auctions. While the import departments of the auctions have invested in import-related infrastructure such as roller beds for airplane pallets, and have established satellite offices in supplying countries, the majority of auctions rely on external agents to perform import functions (cutting, rehydrating and re-packing flowers).

The role of agents is growing in all European countries, in the Czech Republic as well. Agents play an important role in transferring flowers from air-transport-based to auction-based packaging and exporters. The number of agents in the Czech Republic is growing, but still very small. Besides this, most agents are working alone and are not registered. The number of agents active on the markets changes frequently. Due to this, it is very hard to provide detailed information about the most important agents on the market.

A.D. 3) Wholesale level

The next option for Columbian exporters is to sell directly to Czech importing wholesalers. In these physical markets, growers and wholesalers sell their produce to local retailers, mainly specialised flower shops and smaller garden centres. In the Czech Republic traditional wholesale markets still plays an important role in the distribution chain.

When imported flowers are sold via the Netherlands auctions, handling costs can be high (20-25 percent of the auction revenue). When flowers are sent directly to the Czech Republic, prices are not augmented by such costs.

In addition to advising on the best method of selling the product, the importing wholesaler acts as a valuable link with the market place, providing the foreign exporter with information about the required quality standards, packaging, presentation and assortment.

The wholesale can also help the foreign exporter to obtain suitable technical advice on the growing of flowers and the young plant material. Furthermore,
he can give advice regarding transportation, handling and care. The importance of deliveries by wholesalers to retailers abroad is increasing. Important wholesalers are:

"A-Z" - FLOR s.r.o.
Družstevní 1062/19
250 88 Čelákovice, Czech Republic
Telephone: +42 (0)326 992 711
Fax: +42 (0) 326 992 711
Internet: www.azflor.cz
E-mail: azflor@azflor.org
Contact person: Mr. Petr Hora

Florplant, s.r.o.
ul. Karla Čapka
753 01 Hranice na Moravě, Czech Republic
Telephone: +42 (0)581 607 061-2
Fax: +42 (0)581 601 790
Internet: www.florplant.cz
E-mail: info@florplant.cz
Contact person: Ms. Magda Soukeníková
Purchased quantity
-from the Netherlands: 80% of supplies
-elsewhere: 20% Colombia, Denmark, USA, Thailand

Eurolank CZ s.r.o.
28. října 681
435 02 Most – Souš, Czech Republic
Telephone: +42 (0)476 102 833
Fax: +42 (0)476 706 229
Internet: www.eurolank.cz
E-mail: eurolank@eurolank.cz
Contact person: Ms. Otýlie Mládková
Purchased quantity
-from the Netherlands: 90% of supplies
-elsewhere: 10% from South America, Italy, Spain

Vonekl s.r.o.
Kšiřova 669/261
619 00 Brno – Horní Herš pie, Czech Republic
Telephone: +42 (0)543 420 444
Fax: +42(0) 543 420 445
Internet: www.vonekl.cz
E-mail: vonekl@volny.cz
Contact person: Mr. Pavel Rymel
Purchased quantity:

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Fresh flowers in the Czech Republic

- from the Netherlands: 80% of supplies
- elsewhere: 20% from Colombia

A.D. 4) Retail level

The importance of the supermarket, at the retail level of the distribution chain, has been growing for a number of years. However, the shares of nurseries, garden centres and market and street vendors are also important. There is a considerable diversity in the flower assortment offered by the various types of retail outlets. In general, florists offer a wide assortment of flowers, whereas the assortment sold by market and street vendors is narrower.

In addition to providing services (such as arranging a bouquet, fashioning wreaths and floral decorations, and delivery), florists offer information and advice about their products to consumers. They are usually more prepared to accept novelties than other retail outlets.

As in market and street selling, a high proportion of flower sales is generated by impulse purchases. The presence of flowers, at strategic locations and at low prices, offers customers a good opportunity to buy on impulse for use in their own home.

The flower assortment used to be very narrow in supermarket departments. However, the quality and assortment of flowers offered has improved considerably. Most supermarkets have self-service sales. Ready-made bunches of flowers are of particular importance for supermarkets.

Important super- and hobby markets are:

**Baumax ČR s.r.o.**
Turkova 1272/7
149 00 Praha 4 – Chodov, Czech Republic
Telephone: +42 (0)267 289 176
Fax: +42 (0)267 289 115
Internet: www.baumax.cz
E-mail: pavlovskav@baumax.cz
Contact person: Ms. Pavlovská

**Bauhaus**
Heršpická 9, 639 00 Brno – Heršpice, Czech Republic
Telephone: +42 (0)538 725 616
Fax: +42 (0)543 217 299
Internet: www.bauhaus.cz
E-mail: info.brno@bauhaus.cz
E-Commerce

Electronic commerce is increasing in importance in the Czech floricultural business. Over the past years most activities are directed for improving information transfer and trade (between growers, auction, wholesaler and retailer).

Distributors in the Czech Republic transport flowers from different places from Europe to wholesalers. Generally the fresh cut flowers are not transported directly to retailers, but the channel leads through wholesalers to retailers. This last part of transport is done by wholesalers themselves by using their own cooling trucks.
5.2 Recommendations

Auctions can be an attractive sales channel because they can sell everything you are able to transport during a specified season, providing you can comply with the quality requirements. Furthermore, the price is determined on an open market, payment is secure and reasonably quick, there are no problems with cash collection and quality disputes, and air transport can be paid in advance.

In general, auctions prefer to work with larger exporters of (mass-produced) flowers. If they are able to regularly supply good and interesting products, medium-sized exporters can also supply the Czech and the whole European market through the auction system.

Both using agents and supplying directly to the auctions have their advantages and disadvantages. While risk management is the same between the two parties, payment terms and information provision are more advantageous to suppliers of the auction chain. In contrast to agents, who may delay payments for up to a month, auctions issue payments almost immediately.

In order to supply an auction, the exporter has to have an annual licence to supply specific varieties over a specific period. An exporter should have at least three flights per week, and must supply an agreed percentage of his output. Failure to comply can mean that the licence is not renewed the following year.

Exporting directly to Czech wholesalers is suitable for large as well as small and medium-sized exporting companies. In general, Czech import / wholesale companies, which offer a wide assortment of products to their customers, mostly prefer to do business on an arm's-length basis without long-term contracts. Importers are often looking out for specific products to complete their assortment. As the products that importers are looking for, can vary per company, information on the type of products and varieties can best be obtained from these companies themselves.

When cut flowers are sent directly to the consumer countries rather than via the auctions, they leave out a number of links in the chain. This can save time and costs of preparation for the auctions and onward transport. However, besides the advantages, it also presents problems of its own like the need to get all the boxes to the buyers and dealing with claims and collecting the money.

Supplying large retail buyers often requires that exporters have the capacity for volume growth, which requires significant investment in production and post-harvest facilities and operational quality systems (ISO). Often, retail buyers have specific wishes in the field of packaging (marking, labelling).

6.1 Preferential tariffs

All goods entering the EU are subject to import duties. External trade conditions are mostly determined by EU regulations. The Czech Republic also uses the EU’s Harmonized Tariff Schedule (Nomenclature) on the TARIC (Integrated Tariff of the European Community) which is issued by the Commission and the Member States for the purpose of applying Community measures relating to import and exports. The level of the tariffs depends on the country of origin and the product. If there is not a special trade agreement in force, the general import tariff (conventional duty) applies.

In January 2005 Commission Regulation (EC) No 1810/2004 entered in force which is binding in all Member States. In its Part Two “Schedule of Customs Duties”, Section II “Vegetable products” Chapter 6 deals with “Live Trees and other plants; bulbs, roots and the like; cut flowers and ornamental foliage”. The subcategories 0601, 0602, 0603 contain the fresh cut flowers relevant for this report.

Colombia is included in the general system of preferences – GSP. This agreement allows products originating in the countries concerned to be imported at preferential tariffs or, for the least developed countries, duty-free. A “Certificate of Origin Form A” has to be filled in by the exporter and issued by the competent authorities. Tariff contingents and tariff ceilings do not exist anymore.

According to international agreements Colombia is included in the SPGE group of preferences and therefore benefits from 0% tariff preference on the basis on Regulation (EC) No 2501/2001 and Commission Regulation (EC) No 2331/2003. Until July 1st 2005, this meant that Colombian exporters could introduce so-called “non-sensitive” products at a 0% tariff rate and “sensitive” products, such as all products under nomenclatures code 0601, 0602 and 0603 at a 3.5% reduced rate.

However since July 1st 2005, Colombia is a member of the GSP Plus program, which assists the countries of the Andean Community, such as Colombia, in their battle against drugs. The GSP Plus will officially enter into force on the 1st January 2005, but has already started to run in its preliminary form for 14 countries on the 1st July 2005. Exporters based in one of the GSP Plus programs are also exempt from duties on sensitive products. Therefore all flowers and flower buds can be imported into the European Union from Colombia duty free.
6.2 Tariffs imposed by major competitors

Major Colombian competitors are countries belonging to the GPS Plus group (Bolivia, Costa Rica, Ecuador, El Salvador, Honduras, Guatemala, Nicaragua, Pakistan, Panama, Peru and Venezuela) and therefore a 0% preferential tariff relates to them as well. Israel, Turkey and LOMA (e.g. Kenya or Zimbabwe) also benefit from a 0% tariff preference.

On the other hand, the SPGL group (e.g. Thailand, China, South Africa and India) has a 1,6% tariff preference for the 0601 group and a 8,5% tariff preference for CN 0603, excluding Chile, which has a 3,4% tariff preference.

The conventional rates for third countries that not have a general system of preferences with the European Union are the following:

Figure 6.2.1 EU Tariff schedule

<table>
<thead>
<tr>
<th>CN code</th>
<th>Description</th>
<th>Convention rate of duty (%)</th>
<th>Supplementary unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>0601</td>
<td><strong>Bulbs, tubers, tuberous roots, corms, crowns and rhizomes, dormant, in growth or in flower; chicory plants and roots other than roots of heading 1212:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0601 10</td>
<td><strong>Bulbs, tubers, tuberous roots, corms, crowns and rhizomes, dormant:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0601 10 10</td>
<td>Hyacinths</td>
<td>5,1</td>
<td>p/st</td>
</tr>
<tr>
<td>0601 10 20</td>
<td>Narcissi</td>
<td>5,1</td>
<td>p/st</td>
</tr>
<tr>
<td>0601 10 30</td>
<td>Tulips</td>
<td>5,1</td>
<td>p/st</td>
</tr>
<tr>
<td>0601 10 40</td>
<td>Gladioli</td>
<td>5,1</td>
<td>p/st</td>
</tr>
<tr>
<td>0601 10 90</td>
<td>Other</td>
<td>5,1</td>
<td>-</td>
</tr>
<tr>
<td>0601 20</td>
<td><strong>Bulbs, tubers, tuberous roots, corms, crowns and rhizomes, in growth or in flower; chicory plants and roots:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0601 20 10</td>
<td>Chicory plants and roots</td>
<td>Free</td>
<td>-</td>
</tr>
<tr>
<td>0601 20 30</td>
<td>Orchids, hyacinths, narcissi and tulips</td>
<td>9,6</td>
<td>-</td>
</tr>
<tr>
<td>0601 20 90</td>
<td>other</td>
<td>6,4</td>
<td>-</td>
</tr>
<tr>
<td>0603</td>
<td><strong>Cut flowers and flower buds of a kind suitable for bouquets or for ornamental purposes, fresh, dried, dyed,</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The biggest foreign competitors within the Czech flower market are however mainly based in other European Union states, such as the Netherlands, and therefore do not have to pay any duties whatsoever.

### 6.3 Norms of origin

To be able to benefit from the GSP Plus 0% duties on sensitive and non-sensitive products it is necessary to prove that the product that is being imported is really from Colombia or another GSP (Plus) country. Some products clearly originate in a given country, e.g. because they are grown there from local seed. These are called “wholly obtained” goods. But increasingly in today’s world, others are not produced in a single country.

In general terms, products are wholly obtained in a particular beneficiary country (or in the EC, in the case of cumulation) if only that country has been involved in their production. Even the smallest addition or input from any other country disqualifies a product from being "wholly obtained". In the case of flowers this means that the flowers have to be grown and harvested within Colombia.

In practice, except for naturally-occurring and related products, situations where only a single country is involved in the manufacture of a product are relatively rare. Globalisation of manufacturing processes has resulted in many products being made from parts, materials etc. coming from all over the world. Such products are not of course, wholly obtained, but they can nevertheless obtain originating status.

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\[8 \text{ From 1 January to 31 May: } 8.5; \text{ from 1 June to 31 October: } 12; \text{ from 1 November to 31 December: } 8.5.\]
The condition is that the non-originating materials used (in practice: the materials imported into the beneficiary country) have undergone "sufficient working or processing". It must be stressed that only the non-originating materials need to be worked or processed sufficiently. If the other materials used are by themselves already originating (either by virtue of being wholly obtained, or by having been worked or processed sufficiently), they do not have to satisfy the conditions set out.

What can be considered as sufficient working or processing, depends on the product in question. For the products that belong under Chapter 6, all fresh cut flowers, the requirements are that the working or processing carried out on non-originating materials, which confers originating status is manufacture in which:
- All materials of Chapter 6 used are wholly obtained and
- The value of all the materials used does not exceed 50% of the ex-works price of the product

**Figure 6.3.1 Sufficient working or processing requirements**

<table>
<thead>
<tr>
<th>HS heading</th>
<th>Description of product</th>
<th>Working or processing, carried out on non-originating materials, which confers originating status</th>
</tr>
</thead>
</table>
| Chapter 6  | Live roots and other plants: bulbs, ross and the like; cut flowers and ornamental foliage | Manufacture in which:  
- all the materials of Chapter 6 used are wholly obtained, and  
- the value of all the materials used does not exceed 50% of the ex-works price of the product |

**Source:** Official Journal of the European Union

There are three principal forms of proof used in the context of the EC GSP:

- The certificate of origin Form A\(^9\), used as proof of origin at import into the EC and in regional cumulation.
  - Regional cumulation can be present between the countries of one of the regional groups recognised by the EC GSP\(^10\).

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\(^9\) We kindly refer you to the annexes for an example of Form A

\(^10\) The regional groups (listed in Article 72) are:
- Group I: Brunei-Darussalam, Cambodia, Indonesia, Laos, Malaysia, Philippines, Singapore, Thailand, Vietnam;
- Group II: Bolivia, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru, Venezuela;

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Fresh flowers in the Czech Republic

originating in one country of the group which are further worked or processed in another beneficiary country of the same group are considered to originate in the latter country.

- The Invoice Declaration, which can be used for goods whose total value does not exceed € 6000 (Article 89).
- The Movement Certificate EUR1, which may be used as may an invoice declaration, when goods are exported to beneficiary countries from the EC in the context of bilateral cumulation. (Article 90a).
  - Under bilateral cumulation, materials originating in the EC, within the meaning of the EC GSP RoO, and further worked or processed in a beneficiary country, are considered to originate in the beneficiary country.

The period of validity of a proof of origin is 10 months.

6.4 Barriers

Levying of any customs duty or charge having an equivalent effect and the application of any quantitative import restriction or measure having an equivalent effect are prohibited in trade with third countries.

For exporters in developing countries legislative standards enforced through EU legislation and possibly through EU member states, increasingly pose obstacles when exporting to the EU. Although standards are developed in order to protect consumers, environment or improve the harmonization of the internal EU market; they are often seen as technical, non-tariff barriers to trade or as a green wall protecting the fortress of Europe when looking at environmental standards.

When looking at the situation of exporters in developing countries who would like to access the EU market, there are many differences to overcome. Differences between the EU and third countries in their technical regulations and conformity assessment procedures are based on legitimate origins, such as differences in local preferences regarding health, safety and the environment, and differences in levels of income and labour conditions.

Moreover, exporters in developing countries often are critically constrained by the lack of important issues such as:
- Access to credit and insurance and investment climate
- Human and physical capital, management and marketing skills
- Sufficient facilities for transport and storage infrastructures
- Transparent legal and regulatory framework
- Awareness and knowledge

- Group III: Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, Sri Lanka.
- Participation in the development of standards
- Certifying bodies, test laboratories, standardization institutes etc.

Therefore, the standards in the EU could be seen as obstacles when accessing the EU market, though official barriers do not longer exist.

### 6.5 Licenses

The imports into the European Union (EU) of plants, plant products and any other material capable of harbouring plant pests (e.g. wooden products and containers, soil, etc) may be subject to the following protective measures, as established by Directive 2000/29/EC:

1. Import Bans;
2. Phytosanitary certificate and/or phytosanitary certificate for re-export;
3. Customs Inspection and plant health checks;
4. Importers Register;
5. Advance notice on imports.

These phytosanitary measures are intended to prevent the introduction and/or spread of pests and organisms harmful to plants or plant products across the EU boundaries. Those measures enforce the International Plant Protection Convention (IPPC)–FAO, to which EU Member States are contracting parties and which sets out the basic rules and control procedures to secure a common and effective action to protect the countries’ agricultural and forestry resources.

The IPPC requires every contracting country to establish a national plant protection organization to inspect growing crops and to report on pests and control them. A complete listing of the national plant protection organizations (NPPOS) can be found at the official website for the IPPC (http://www.ippc.int/).

French Overseas Departments and Spanish Canary Islands, in view of its agricultural and ecological characteristics, may request additional conditions to those laid down in the Directive assuming they are justified on grounds of the protection of health and life of plants in their territories.

Directive 2000/29/EC establishes several exemptions for each phytosanitary measure (e.g. plants and plant products for trial, scientific purposes, work on varieties selection; internal transit; small quantities that do not pose a risk of spreading harmful organisms etc.). They are usually granted for a limited period, subject to special import conditions and to a specific licence.

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11 Source: DG Trade

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1. Import bans

Member States shall ban the introduction into their territory of:

A. Certain particularly dangerous harmful organisms, which are listed in Annex I, Part A.
B. Plants and plant products listed in Annex II, Part A, where they are contaminated by the relevant harmful organisms listed in that part of the Annex.
C. Plants or plant products listed in Annex III, Part A, where they originate in the relevant countries referred to in that part of the Annex.
D. Plants, plant products and other objects listed in Annex IV, Part A, except for those meeting the special requirements indicated in that part of the Annex.

In relation to wood packaging, the new provisions introduced by Directive 2004/102/EC establish that wood packages of any type (cases, boxes, crates, drums, pallets, box pallets and other load boards, pallet collars, etc) shall go through one of the approved treatments to FAO International Standard for Phytosanitary Measures No. 15 and bear the corresponding mark.

Decision 2005/51/EC, authorises Member States to provide derogations with regard to the prohibitions referred to in point 14 of Annex III Part A and point 34, section I, Part A, Annex IV above mentioned for soil originating in certain third countries under specific conditions provided for in the Annex of the same Decision and destined for treatment in dedicated hazardous-waste incinerators.

Certain areas of the EU, that are free from plant pests established elsewhere in the EU, have been designated as "protected zones" and may be affected by special bans and requirements to prevent spreading of harmful organisms to particular crops (Annex I Part B; Annex II Part B; Annex III Part B and Annex IV Part B).

2. Phytosanitary certificate and/or phytosanitary certificate for re-export.

Imports of plants and plant products listed in Annex V, Part B, which are all products belonging under Chapter 6 including all kinds of fresh cut flowers must be accompanied either by an official "phytosanitary certificate" or a "phytosanitary certificate for re-export" (in case the consignment after being dispatched from a third country, has been stored, repacked or split up in another non-EU country).

Those documents certify the phytosanitary conditions of plants and plants products, and also that the shipment has been officially inspected, complies with

12 All appropriate annexes can be found at http://export-help.cec.eu.int/
statutory requirements for entry into the EU and is free of quarantine pests and other harmful pathogens.

They shall be at least in one of the official languages of the EU and shall be issued by the designated authorities of the third country of export or re-export and made out not more than 14 days before the date on which the plants, plant products or other objects covered by it have left the country of issuance.

Phytosanitary certificates shall be issued in compliance with the provisions of the IPPC and taking into account the FAO International Standard for Phytosanitary Measures No 12 on Guidelines for phytosanitary certificates.\textsuperscript{13}

3. Customs inspection and plant health checks.

In addition to the above mentioned certificates, the plants and plant products listed in Annex V, Part B shall, from the time of their entry in the EU, be subject to customs inspections and supervision by the responsible official bodies.

The inspections shall consist in:

- Documentary checks establishing that the required certificates, alternative documents or marks have been issued or satisfied
- Identity checks establishing that the plants, plant products or other objects conform to the ones declared on the required documents and
- Plant health checks establishing that the plants, plant products or other objects, including their wood packing material if any, comply with the specific requirements and phytosanitary measures specified in Directive 2000/29/EC and can be imported into the EU.

The inspections must be made at the point of entry into the EU at the proper Member State’s border inspection post (BIP). However, identity checks and plant health checks may be carried out at the place of destination provided that there is satisfaction of specific guarantees and documents regarding transport of plants and plant products determined for each particular case.

4. Importers register

Importers, whether or not producers, of plants, plant products or other objects, listed in Annex V, Part B, must be included in an official register of a Member State under an official registration number.

\textsuperscript{13} For a sample of a phytosanitary certificate, please see the annexes
5. Advance notice on imports

Member States may require airport authorities, harbour authorities, importers or operators to give, as soon as they are aware of the imminent arrival of a consignment of plants, plant products and other objects advance notice to the customs office of point of entry and to the official body of point of entry.

In addition and without prejudice to provisions of Directive 29/00, plants, plant products and any other material capable of harbouring plant pests may be subject to emergency measures.

Additional information for the Czech Republic

Inspection Procedure

Health inspection has to be applied for by the importer or his representative prior to the importation by submitting a plant health movement document\(^\text{14}\) (Rostlinolékařský přepravní doklad), accompanied by an enclosure of the mandatory certificates related to the goods in question.

In addition to the verification of the documents, the authorities at the customs points of entry will inspect the products upon arrival by identity and/or physical checks. Sampling procedures for quality analyses can be carried out at designated control laboratories. Additional checks can be executed at all stages of the supply chain.

If the results of the inspection procedures have been proven to be favourable for the importation of the goods, the commodities can be released for free circulation.

Health controls of plants and plant products are only carried out at the designated Border Inspection Posts - BIPs (Stanoviště hranicní kontroly) located at the airport Ruzyně in Prague and at the customs post office in Prague 5.

Competent authority / competent bodies

Státní rostlinolékařská správa (State Phytosanitary Administration)
Odbor karantény (Division of Quarantine)

Drnovská 507
CZ-16106 Praha
Tel: (+420) 2 3302 2234
Fax: (+420) 2 3302 2240

\(^\text{14}\) For the full document in English we refer you to the annexes
6.6 Quotas

Quotas have been assigned by the European Union to specific countries for specific products, which allow for the controlled import of specific products.

There are however no quotas for any of the products under Chapter 6 originating from Colombia.

6.7 Approvals & Technical standards

Quality standards for flowers are fixed in the Regulation (EEC) No 316/68. The European consumers demand an extremely high quality of fresh cut flowers. The above mentioned regulation determines quality requirements, classification of produce, sizing, quality and length tolerances, packaging rules and marking.

High quality of cut flowers is requested by Czech consumers. As the Czech Republic is an EU member, the quality requirements are outlined by the EU law. Regulation (EEC) No. 316/68 fixes general standards for flowers. These rules include minimal requirements, tolerance for quality and branding. The regulation determines minimum quality requirements, requirements for class I, II and extra class.

The minimum requirement specifies that flowers must be carefully cut and be in a proper phase of development. Flowers in class I must be of a good quality and possess the feature characteristics for a given flower variety. The flowers must be fresh, whole and free of disease, pests, damages and alien substances. Shoots must be strong and solid in order to be able to carry flowers.

Flowers in II class must be also fresh, complete and free of disease and pests. However, the flowers may have some imperfections such as small distortions, mechanical damages or not serious damages caused by pests. On the other hand these imperfections cannot decrease quality, appearance and utility of flowers.

The unit of package of I class flowers can have 5% of insignificant imperfections, of II class flowers 10%. Extra class consists of flowers classified as I class but without any imperfections.

Quality standards also describe rules of sorting according to the length of flower (including a head of flower). In a package unit the difference between the longest and the shortest flower must not exceed 2,5 cm for flowers up to 20 cm, 5 cm for flowers 20-60 cm and 10 cm for flowers longer than 60 cm.

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Regulation 316/68 specifies that quality requirements for cut flowers and green cut plants apply to wholesalers (producer or dealer), importers, exporters and during transportation.

In accordance to Regulation 234/68 each member country is obliged to control its market of cut flowers and green cut plants. To fulfill that obligation, a member country must appoint a responsible institution. In the Czech Republic these duties are fulfilled by The State Phytosanitary Administration (SPA) (Státní rostlinolékařská správa) which is the official national phytosanitary authority pursuant to Art. IV of the International Plant Protection Convention (Fao, 1951, rev.1979), and to Art. 1, §6 Council Directive No. 77/93/EEC. Activities of the SPA are founded by the Act No. 326/2004 Sb. on phytosanitary care and changes of some other related Acts. Protection of the territory of the Czech Republic and of the other Member States of EU against the introduction of harmful organisms from abroad, as well as protection against further spread of quarantine harmful organisms within the territory of the Czech Republic and in the course of export of plant commodities to the third countries belongs to its main activities.

6.8 Packaging

Packaging of cut flowers has to satisfy a number of conditions, mainly lying in the field of handling, and the protection of the quality and presentation. EU regulation 802/71, a supplement to EU regulation 316/68, also specifies minimum standards concerning packaging and presentation.

A unit of presentation (bunch, bouquet, box, and the like) must consist of 5, 10 or a multiple of 10 pieces. However, this rule does not apply to single flowers normally sold by weight and flowers for which seller and buyer explicitly agree to derogate from the provisions concerning the number of flowers in a unit of presentation.

Each package must contain flowers of the same genus, species or variety and of the same quality class, and must have reached the same stage of development. However, mixtures of flowers or mixtures of flowers with foliage of different genus, species or variety are permitted as long as products of the same quality class are used and they are appropriately marked.

6.9 Required documentation for import

When importing products from a third country (e.g. Colombia) into the European Union, six different documents are required;

1) Commercial invoice
Market Researches in Eastern Europe

The commercial invoice is a record or evidence of the transaction between the exporter and the importer. Once the goods are available, the exporter issues a commercial invoice to the importer in order to charge him for the goods.

The commercial invoice contains the basic information concerning the transaction and it is always required for customs clearance.

It is similar to an ordinary sales invoice, though some entries specific to the export-import trade are added. The minimum data generally included are the following:

- Information on the exporter and the importer (name and address)
- Date of issue
- Invoice number
- Description of the goods (name, quality, etc.)
- Unit of measure
- Quantity of goods
- Unit value
- Total item value
- Total invoice value and currency of payment. The equivalent amount must be indicated in a currency freely convertible to EUR or other legal tender in the importing Member State
- The terms of payment (method and date of payment, discounts, etc.)
- The terms of delivery according to the appropriate Incoterm
- Means of transport

No specific form is required. The commercial invoice is to be prepared by the exporter according to standard business practice and it must be submitted in the original along with at least one copy. It generally needs not be signed. In practice, the original and the copy of the commercial invoice are often signed. The commercial invoice may be prepared in any language. However, a translation into English is recommended.

2) Customs Value Declaration

The Customs Value Declaration is a document which must be presented to the customs authorities where the value of the imported goods exceeds EUR 10 000. The Customs Value Declaration must be draw up conforming to form DV 1\textsuperscript{15}, laying down provisions for the implementation of the Community Customs Code. This form must be presented with the Single Administrative Document (SAD).

The main purpose of this requirement is to assess the value of the transaction in order to fix the customs value (taxable value) to apply the tariff duties.

\textsuperscript{15} Please see the annexes for a sample of a DV1 form

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The customs value corresponds to the value of the goods including all the costs incurred (e.g.: commercial price, transport, insurance) until the first point of entry in the EU. The usual method for establishing the Customs value is using the transaction value (the price paid or payable for the imported goods).

In certain cases the transaction value of the imported goods may be subject to adjustment which involves additions or deductions. For instance:

- commissions or royalties may need to be added to the price;
- the internal transport (from the entry point to the final destination in the Community Customs Territory) must be deducted.

The customs authorities shall waive the requirement of all or part of the customs value declaration where:

- the customs value of the imported goods in a consignment does not exceed EUR 10 000, provided that they do not constitute split or multiple consignments from the same consignor to the same consignee, or
- the importations involved are of a non-commercial nature; or
- the submission of the particulars in question is not necessary for the application of the Customs Tariff of the European Communities or where the customs duties provided for in the Tariff are not chargeable pursuant to specific customs provisions.

3) Freight insurance

The insurance is an agreement by which the insured is indemnified in the event of damages due to a risk covered in the policy. Insurance is all-important in the transport of goods because of its exposure to risks during handling, storing, loading or transporting cargo, and other rare risks, such as riots, strikes or terrorism.

There is a difference between the goods' transport insurance and the carrier's responsibility insurance. The transport insurance is a contract whose covered risks, fixed compensation and indemnity are let to the holder's choice. Nevertheless, the haulier's responsibility insurance is determined by different regulations depending on the means of transport, indemnity is limited by the weight and value of the goods and is only given if the transporter was unable to evade responsibility.

The insurance invoice is required for customs clearance only when the relevant data do not appear in the commercial invoice indicating the premium paid for insuring the merchandise.

The standard extent of the transporter's responsibility is laid down in the following international conventions:
1. Road freight

International transport of goods by road is governed by the Convention for the Contract of the International Carriage of Goods by Road (CMR Convention) signed in Geneva in 1956. Under this Convention, the road haulier is not responsible for losses of or damages to the goods if he proves that they arise from:

- the merchandise's own defect(s);
- force majeure;
- a fault by the loader or consignee.

There is no European Union's regulation regarding indemnifications for road freight.

2. The rail carrier

International transport of goods by rail is regulated by the Convention concerning Intercarriage by Rail (CIM Convention), signed in Bern in 1980.

The rail carrier is not responsible for losses of or damages to the goods if he proves that they arise from:

- the merchandise's own defect(s);
- force majeure;
- a fault by the loader or consignee.

With reference to compensation, there is currently no European regulation. Indemnification is normally limited to a maximum amount per gross kilo lost or damaged. This system means that, for the most part, the company is unlikely to receive anything approaching the value of its goods.

3. The shipping company

The 1968 International Convention on Bill of Lading, better known as "The Hague Rules" or the "Brussels Convention" dictates the marine carrier's responsibilities when transporting international goods.

The shipping company is not responsible for losses of, or damage to, the goods if it proves that they arise from:

- the merchandise's own defects and loss in weight during transport;
- a nautical mistake by the crew;
- a fire;
- if the ship is not seaworthy;
- force majeure;
Fresh flowers in the Czech Republic

- strikes or a lock-out;
- a mistake by the loader;
- hidden defects on board ship, which went unnoticed during rigorous inspection;
- an attempt to save lives or goods at sea.

As far as compensation is concerned, there is currently no harmonisation at the European Union level. It is normally limited to a certain sum per kilogram of lost or damaged goods. This system causes the same problems as with rail accidents, the exporter is likely to lose much of the value of the goods.

4. The air carrier

The 1929 Warsaw Convention as well as the Montreal draft Treaty of 1975 determined that the air carrier is not responsible for damages or loss of goods if it is proved that:

- the carrier and associates took all the measures necessary to avoid the damage or that it was impossible for them to be taken (force majeure);
- the losses arise from a pilotage or navigation mistake;
- the injured party was the cause of the damage or contributed to it.

Concerning the injured party's indemnification, there is no European standard. Compensation is normally limited to a set amount per gross kilogram of damaged or lost goods.

The air carrier can state specific reservations at the time of receiving the cargo. These reservations will be written on the air consignment note (ACN) (air transport contract) and will be used as evidence. However, airlines will normally refuse dubious packages or those not corresponding to the ACN.

4) Customs Import Declaration (SAD)

All goods imported into the European Union (EU) must be declared to the customs authorities of the respective Member State using the Single Administrative Document (SAD)\(^\text{16}\), which is the common import declaration form for all the Member States, laid down in the Community Customs Code (Regulation (EEC) 2913/92.

The declaration must be drawn up in one of the official languages of the EU which is acceptable to the customs authorities of the Member State where the formalities are carried out.

\(^{16}\) See annexes
The SAD may be presented either by:

- Using an approved computerised system linked to Customs authorities; or
- Lodging it with the designated Customs Office premises.

The main information that shall be declared is:

- Identifying data of the parties involved in the operation (importer, exporter, representative,....)
- Custom approved treatment (release for free circulation, release for consumption, temporary importation, transit,....)
- Identifying data of the goods (Taric code, weight, units), location and packaging
- Information referred to the means of transport
- Data about country of origin, country of export and destination
- Commercial and financial information (Incoterm, invoice value, invoice currency, exchange rate, insurance...)
- List of documents associated to the SAD (Import licenses, inspection certificates, document of origin, transport document, commercial invoice...)
- Declaration and method of payment of import taxes (tariff duties, VAT, Excises, etc)

The SAD set consists of eight copies, the operator completes all or part of the sheets depending on the type of operation.

In the case of importation generally three copies shall be used: one is to be retained by the authorities of the Member State in which arrival formalities are completed, other is used for statistical purposes by the Member State of destination and the last one is returned to the consignee after being stamped by the customs authority.

Documents associated to the SAD

According to the operation and the nature of the imported goods, additional documents shall be declared with the SAD and shall be presented together with it. The most important documents are:

- Documentary proof of origin, normally used to apply a tariff preferential treatment
- Certificate confirming the special nature of the product
- Transport Document
- Commercial Invoice
- Customs Value Declaration
- Inspections Certificates (Health, Veterinary, Plant Health certificates)
- Import Licenses
- Community Surveillance Document
• Cites Certificate
• Documents to support a claim of a tariff quota
• Documents required for Excises purposes
• Evidence to support a claim to VAT relief

5) Freight documents

Depending on the means of transport used, the following documents are to be filled in and presented to the customs authorities of the importing European Union (EU) Member State (MS) upon importation in order for the goods to be cleared:

• Bill of Lading
• FIATA Bill of Lading
• Road Waybill (CMR)
• Air Waybill (AWB)
• Rail Waybill (CIM)
• ATA Carnet
• TIR Carnet

**Bill of Lading**

The Bill of Lading (B/L) is a document issued by the shipping company to the operating shipper which acknowledges that the goods have been received on board serving as *proof of receipt* of the goods by the carrier obliging him to deliver the goods to the consignee. It contains the details of the goods, vessel and port of destination. It *evidences the contract* of carriage and conveys *title to the goods*, meaning that the bearer of the Bill of Lading is the owner of the goods.

The Bill of Lading may be a negotiable document. A number of different types of bills of lading can be used. "Clean Bills of Lading" state that the goods have been received in an apparent good order and condition. "Unclean or Dirty Bills of Lading" indicate that the goods are damaged or in bad order, in this case, the financing bank may refuse to accept the consignor's documents.

**FIATA Bill of Lading**

The *FIATA Bill of Lading* is a document designed to be used as a multimodal or combined transport document with negotiable status which has been developed by the *International Federation of Forwarding Agents' Associations* (FIATA).
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Road Waybill (CMR)

The road waybill is a document containing the details of the international transportation of goods by road, set out by the Convention for the Contract of the International Carriage of Goods by Road 1956 (the CMR Convention). It enables the consignor to have the goods at his disposal during the transportation. It must be issued in quadruplicate and signed by the consignor and the carrier. The first copy is intended for the consignor; the second remains in the possession of the carrier; and the third accompanies the goods and is delivered to the consignee. Usually, a CMR is issued for each vehicle.

The CMR note is not a document of title and is non-negotiable.

Air Waybill (AWB)

The air waybill is a document proving the transport contract between the consignor and the carrier's company. It is issued by the carrier's agent and falls under the provisions of the Warsaw Convention. A single air waybill may be used for multiple shipments of goods, it contains three originals and several extra copies. One original is kept by each of the parties involved in the transport (the consignor, the consignee and the carrier). The copies may be required at the airport of departure/destination, for the delivery and in some cases, for further freight carriers. The air waybill is a freight bill which evidences a contract of carriage and proves receipt of goods.

The IATA Standard Air Waybill is used by all carriers belonging to the International Air Transport Association (IATA) and it embodies standard conditions associated to those set out in the Warsaw Convention.

Rail Waybill (CIM)

The rail waybill (CIM) is a document required for the transportation of goods by rail. It is regulated by the Convention concerning International Carriage by Rail 1980 (COTIF-CIM). The CIM is issued by the carrier in five copies, the original accompanies the goods and the duplicate of the original is kept by the consignor and the three remaining copies are intended for internal purposes of the carrier. It is considered the rail transport contract.

ATA Carnet

ATA carnets are international customs documents issued by chambers of commerce in most major countries throughout the world for the purpose of allowing the temporary importation of goods, free of customs duties and taxes. ATA carnets can be issued for the following categories of goods:
commercial samples and advertising film, goods for international exhibition and professional equipment.17

**TIR Carnet**

TIR carnets are customs transit documents used for the international transport of goods a part of which has to be made by road. They allow the transport of goods under a procedure called the TIR procedure, laid down in the 1975 TIR Convention, signed under the auspices of the United Nations Economic Commission for Europe (UNECE)18

The TIR system requires that the goods travel in secure vehicles or containers, all duties and taxes at risk throughout the journey are covered by an internationally valid guarantee, the goods are accompanied by a TIR carnet, and customs control measures in the country of departure are accepted by the countries of transit and destination.

6) Packing list

The packing list (P/L) is a commercial document accompanying the commercial invoice and the transport documents, and providing information on the imported items and the packaging details of each shipment (weight, dimensions, handling issues, etc.)

It is required for customs clearance as an inventory of the incoming cargo.

The data generally included are:

- Information on the exporter, the importer and the transport company
- Date of issue
- Number of the freight invoice
- Type of packaging (drum, crate, carton, box, barrel, bag, etc.)
- Number of packages
- Content of each package (description of the goods and number of items per package)
- Marks and numbers
- Net weight, gross weight and measurement of the packages

No specific form is required. The packing list is to be prepared by the exporter according to standard business practice and it must be submitted in the original along with at least one copy. It generally needs not be signed. However, in

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17 Further information may be obtained in the International Chamber of Commerce’s website: [http://www.iccwbo.org/index_ata.asp](http://www.iccwbo.org/index_ata.asp)
18 Website: [http://www.unece.org/trans/bcf/tir/welcome.html](http://www.unece.org/trans/bcf/tir/welcome.html)
practice, the original and the copy of the packing list are often signed. The packing list may be prepared in any language. However, a translation into English is recommended.

6.10 Import modalities or regimes involved in the process

There are various customs regimes available for the import of goods to the Czech Republic, depending on the type of goods and the purpose of their use.

Free circulation

Goods released for free circulation are subject to the applicable customs duty rate and import VAT. Once released to free circulation, goods are considered as Community goods for VAT purposes, i.e., their further sale is subject to VAT provisions.

Customs free zones

For certain transactions, import to a customs free zone is advantageous, as no customs duty or import VAT is payable at the time of transfer to a customs free zone.

A customs free zone is a precisely determined area within the country that is not considered part of the Czech Republic for VAT purposes. Import from abroad to a customs free zone is not considered as an import to free circulation and is therefore not subject to Czech customs duty or VAT. Czech goods exported to a customs free zone are considered as exported, and therefore no VAT applies (zero-rated).

A customs free zone can be operated by a Czech business entity under the conditions stipulated in the Customs Code. A special license to operate a customs free zone is required, and only a few zones have been licensed. It is unusual for a license to operate a customs free zone to be granted solely for the internal use of the licensee. Customs free zones are generally operated by companies that provide the services of the zone to other business entities. Customs free zones are operated in Prague, Ostrava, Hradec Králové, and Pardubice.

Customs free zones are used primarily for warehousing, sales operations, and to carry out simple manufacturing operations or packaging.

Customs bonded warehouse

The Czech Customs Code also allows goods to be imported from abroad without customs duty or VAT to a customs bonded warehouse in a number of ways.
Non-EU goods imported to a customs bonded warehouse are subject to customs duty and import VAT if the goods are released into free circulation in the Czech Republic.

There is generally no limit to the length of time in which goods can remain in a customs bonded warehouse; however, in certain cases, the Customs Office may state that goods can remain only for a specified time, after which they must be classified under another customs regime.

The transfer of ownership to goods in a customs bonded warehouse is possible only in a public bonded warehouse. Any transfer of ownership must be announced to the Customs Office without delay and supported with appropriate documentation.

On import to a customs bonded warehouse, the importer must provide the Customs Office with a guarantee for the customs debt, i.e., the amount of customs duty and VAT that would apply under free circulation.

Transit regime

In general, goods under customs control are transported under the transit regime. Transport of such goods between EU customs offices takes place under the Community Transit regime (either external or internal). Transport of such goods from the Czech Republic to Ireland, Iceland, Norway, and Switzerland takes place under a Common Transit document. The transit regime ends when the goods reach the Customs Office and the import regime is declared. During the transit regime, the customs debt must be guaranteed.

6.11 Requirements for import of samples and accompanied luggage

The requirements for the import of samples are the same as for the general import of fresh flowers, because flowers are a perishable product.19

6.12 Website links to rules and regulations

  - Integrated Tariff of the European Community

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19 Source: Dutch Customs Office
6.13 Flow chart of the process and related costs

6.13.1 Flow chart of the process and related costs

In general, only EU entities can clear goods for customs in the Czech Republic. Non-EU entities can carry out customs proceedings only on goods under the transit regime or under temporary admission. In other cases, foreign entities can...
clear goods for Czech customs only in exceptional cases with the permission of the Customs Office.

A foreign company exporting to the Czech Republic and wishing to import into the country must either establish a Czech subsidiary to handle importation or engage a customs agent to handle customs proceedings. It is usual practice that the Czech purchaser of imported goods will handle the customs proceedings.

When imported goods reach the EU border, they are released to the transit regime. The customs debt (all import duties that would apply on import under free circulation) must be secured with a customs guarantee at this time. The goods must then be transported to the inland Customs Office of final destination without delay. Here the goods are declared for the chosen customs regime based on the customs declaration filed by the importer (or his customs agent). The final customs debt assessed by the Customs Office is either paid or guaranteed, depending on the import regime and the conditions negotiated with the Customs Office.

If import duties are properly paid (or the customs debt is secured), the Customs Office issues a confirmed customs declaration, which serves as a VAT document for the reclaiming of import VAT. In general, import VAT is applied on the total declared customs value of imported goods and the applicable amount of customs duty and any other charges levied by the Customs Office (e.g., excise duty).

From 1st January 2005, importers can reclaim the amount of import VAT paid, by including the amount in their regular VAT returns, provided the importer is registered for Czech VAT.

VAT rates are the same as for domestic products, currently 19% or 5% (basic consumption goods like bakery). Importers registered for Czech VAT can normally recover import VAT costs, provided a valid customs declaration (tax document) is obtained from the Customs Office. The VAT rate for fresh cut flowers is currently 19%.

6.14 Recommendations

When exporting to the Czech Republic, it is necessary to fulfill all the legislative standards required by EU law. After determination of the CN code on the TARIC, appropriate tariffs and quotas can be found. Apart from all the ordinary import documentation, Colombian exporters of cut flowers need a Sanitary Certificate. The easiest way to start the import activity is beginning to cooperate with a wholesaler within Czech Republic. They usually take care of all the import procedures and help you to recover VAT.
7. Physical Access

7.1 Available transportation infrastructure

There are four ways of transport in the Czech Republic:
- Road transport
- Rail transport
- Air transport
- Water (river) transport

When transporting fresh cut flowers from Columbia, it is not possible to use water transport since it is far too slow. No transport company could guarantee freshness of transported commodity when water transport is used. Flowers are mostly first transported by air and later by truck or, in some cases, by train.

In freight transport the development trend did not show any unforeseeable changes in 2003 in terms of carried goods, freight transport performance has again increased. A marked rise is to be seen in air transport.

As regards freight transport, the growth of transport performance in 2003 amounted to 2.5% in total and the increase in transport volume was still higher, i.e. 4.5%. The growth has been recorded in all transport modes except inland waterway transport, where the transport performance fell by 13% and the transport volume even by 24%. The largest growth has been recorded by air cargo, where the transport performance increased by more than 30%. After two years, the carriage by rail went up slightly again: the volume by 1.4% and the performance by 0.23%. The permanent road freight transport increase showed a slight downturn in 2003, the volume of goods carried decreased by 5.7% and the performance increased by 3.3% “only”. The transport performance declined only in the 1st quarter, while the transport volume declined in all quarters as against 2002.

Figure 7.1.1 Road Transport Infrastructure (Km)

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<td>55 427</td>
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<td>305</td>
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\(^{20}\) Lenght of expressways is included in the lenght of I. Class roads

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<td>6 031</td>
<td>6 091</td>
<td>6 102</td>
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<td>14 686</td>
<td>14 688</td>
<td>4 636</td>
<td>14 668</td>
<td>14 667</td>
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<td>III. Class roads</td>
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<td>34 242</td>
<td>34 190</td>
<td>4 183</td>
<td>34 134</td>
<td>34 141</td>
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<td>72 300</td>
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<td>2 300</td>
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Source: RSD, ČÚ

Figure 7.1.2 Air Transport Infrastructure

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</tr>
<tr>
<td>of which:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public International Airport</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Public Domestic Airport</td>
<td>58</td>
<td>59</td>
<td>57</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>Private International Airport</td>
<td>2</td>
<td>3</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Private Domestic Airport</td>
<td>3</td>
<td>11</td>
<td>11</td>
<td>10</td>
<td>9</td>
</tr>
</tbody>
</table>

Source: Ministry of transport of the Czech Republic – Transport yearbook (www.mdcr.cz)

Figure 7.1.3 Combined Transport Infrastructure

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of combined transport transshipment points</td>
<td>23</td>
<td>14</td>
<td>14</td>
<td>13</td>
<td>11</td>
</tr>
<tr>
<td>according to types of combined transport</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>rail – road</td>
<td>19</td>
<td>10</td>
<td>10</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>rail – road – water</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>According to possibility of handling with loading units</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>large containers</td>
<td>22</td>
<td>13</td>
<td>13</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>swap bodies</td>
<td>6</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>Ro-La</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>By maximum capacity of handling equipment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>less than 34 tonnes</td>
<td>10</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>over 34 tonnes</td>
<td>12</td>
<td>13</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

Source: Ministry of transport of the Czech Republic – Transport yearbook (www.mdcr.cz)

21 In 1997 the renumbering of I, II and III class roads was carried out

70 Proexport Colombia
7.2 Identification of ports, airports, roads – border passes – railways, waterways

Figure 7.2.1 Distances from the most important places in the Netherlands to Prague.

<table>
<thead>
<tr>
<th>Place</th>
<th>Country</th>
<th>Distance to Prague (km)</th>
<th>Driving time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amsterdam</td>
<td>The Netherlands</td>
<td>884</td>
<td>8 h. 48 min.</td>
</tr>
<tr>
<td>Rotterdam</td>
<td>The Netherlands</td>
<td>913</td>
<td>9 h. 09 min.</td>
</tr>
<tr>
<td>Aalsmeer</td>
<td>The Netherlands</td>
<td>894</td>
<td>8 h. 53 min.</td>
</tr>
</tbody>
</table>

Below a map is displayed showing the road from Amsterdam to Prague (the center of distribution within the Czech Republic).²²

Figure 7.2.2 Route Amsterdam – Prague

²² Aalsmeer is 23 km distant from Amsterdam
Figure 7.2.3 Czech road and motorway network

Motorways

Planned motorways

Expressways

Planned expressways

Source: www.rsd.cz

Important airports in the Czech Republic:

- **Brno-Turany Airport (BRQ/LKTB)**  
  Tel: +420 5 4552 1111,  
  (Handling) +420 5 4552 1310-12,  
  Fax: (Admin) +420 5 4521 6357,  
  (Handling) +420 5 4521 6346,  
  e-mail: commercial.dept@airport-brno.cz or handling@airport-brno.cz,  
  Website: www.airport-brno.cz,  
  SITA: BRQCZ7X, AFTN: LKTBVYDT

- **Karlovy Vary Airport (KLV/LKKV)**  
  Tel: +420 353 340611, +420 353 360610,  
  Fax: +420 353 360636, +420 353 360637,  
  e-mail: vaclav.cerny@airport-k-vary.cz or handling@airport-k-vary.cz,  
  SITA: KLVCZ7X,  
  AFTN: LKVVZTXZ
➢ Letiste Ostrava as (OSR/LKMT), Tel: +420 597 471 136,
Fax: +420 597 471 118, e-mail: hanicinec@airport-ostrava.cz,
Website: www.airport-ostrava.cz, SITA: OSRCZ7X, AFTN: LKMTYDYX
➢ Ostrava Int’l Airport (OSR/LKMT), Tel: +420 59 747 1136,
Fax: +420 59 747 1123, e-mail: handling@airport-ostrava.cz,
Website: www.airport-ostrava.cz, SITA: OSRCZ7X, AFTN: LKMTYDYX
➢ Pardubice Int’l Airport (PED/LKPD),
Tel: (Airport Director) +420 46 631 0155, (Handling) +420 46 631 0115,
(Commercial Director) +420 46 631 0150, Fax: +420 46 631 0166, e-mail: eba@airport-pardubice.cz,
Website: www.airport-pardubice.cz, SITA: PEDCZXH, AFTN: LKPĐZTZX
➢ Prague - Ruzyne Airport (PRG/LKPR),
Tel: (Exchange) +420 2 2011 1111, (Director General) +420 2 2011 3924,
Fax: (Director General) +420 2 3535 0922, (Airport Coordinator) +420 2 2011 5301, e-mail: info@csl.cz,
Website: www.csl.cz, SITA: PRGCZ7X, PRVCZ7X, AFTN: LKPĐYDYX
➢ Uherské Hradiště - Kunovice Airport (UHE/LKCU),
Tel: +420 572 817600, Fax: +420 575 759789, e-mail: airport@let.cz,
SITA: UHEAPXH
➢ Vodochody Airport (LKVO), Tel: +420 2 8603 2615,
Fax: +420 2 2747 3216, e-mail: vl@aero.cz or ats.lkro@aero.cz,
Website: www.aero.cz, AFTN: LKVOYDYX
Figure 7.2.4 Czech airports
Figure 7.2.5 Czech railway network
Figure 7.2.6 Map of water ways in western Europe (including Czech Republic)
7.3 **Description of status, operation, security, costs, distances, transportation arrangements and intercommunity customs**

Flowers and plants are sold in the Czech Republic through a chain of shops, partly by specialised flower wholesale centres and partly by retailers and florists.

**Transportation**

Flowers and plants are mainly transported in special CC containers. The packaging is standard and returnable. One truck semi-trailer can be freighted with 38 – 43 CC containers (according to the type of semi-trailer). Some companies use special tandem-axle semi trailers/sets where 48 CC containers can be freighted. The container is mobile as it has 4 wheels. Several shelves can be fit on the container for transport of flowers. A part of the flowers are transported on a carrier’s pallet.\(^{23}\)

As the CC containers are relatively expensive (the price of a container ranges around 100 EUR) they have to be returned to the consignor. There are other types of containers (trolleys) than the CC containers, like for example auction containers, euro containers, e.g. Yet the most used ones are the CC (by another name, Danish container trolleys).

**Long distance flower transport**

A "systems" approach to flower packaging and transport is presented integrating the "bottom air" or "reverse flow" technologies. Trailer load quantities of flowers packed properly in boxes designed with top and bottom vent holes can be cooled to their 7/8 cooling point in 10 to 12 hours if the refrigeration system is adequate. Such refrigeration systems can be either of a trailer or an intermodal container design and have "T"-bottom floor of at least 5.7 cm high, discharge temperature control, bottom air delivery pattern, and at least 57 m³/min air movement at 5 cm water head pressure.

The European competitors mainly use roads and rails to transport their goods. The transportation infrastructure is below the level of the Western countries, however still reliable and secure.

Shipping costs of one container of fresh flowers from Rotterdam (Netherlands) to Prague per rail and road:

<table>
<thead>
<tr>
<th></th>
<th>20` DC</th>
<th>40` DC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 16.5 t</td>
<td>Up to 22 t</td>
<td>Up to 25 t</td>
</tr>
<tr>
<td>720 EUR</td>
<td>800 EUR</td>
<td>950 EUR</td>
</tr>
<tr>
<td>Up to 16.5 t</td>
<td>Up to 27 t</td>
<td></td>
</tr>
<tr>
<td>720 EUR</td>
<td></td>
<td>960 EUR</td>
</tr>
<tr>
<td>Up to 27 t</td>
<td></td>
<td>1140 EUR</td>
</tr>
</tbody>
</table>

\(^{23}\) See more [www.container-centralen.com](http://www.container-centralen.com)
Market Researches in Eastern Europe

Another very popular and cheap way for importers is via the port of Hamburg:

<table>
<thead>
<tr>
<th>20' DC</th>
<th>40' DC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 14 t</td>
<td>Up to 25 t</td>
</tr>
<tr>
<td>370 EUR</td>
<td>410 EUR</td>
</tr>
</tbody>
</table>

These are just the shipping costs, all the other costs are excluded.

Prices of transportation within Europe by road depend on the offer made by a transporting company. It is quite difficult to obtain a price indication from any of these companies, when quantity, distance, requirements cannot be specifically given. Competition in the transport world after the accession of the new member states has been murdering and therefore prices and rates are guarded as company secrets to protect them from exposure to competing companies.

However we have gotten an example of prices provided by Read s.r.o.;

<table>
<thead>
<tr>
<th>Description</th>
<th>Up to € 165.56</th>
<th>Up to € 231.79</th>
<th>€ 231.79 - € 330.91</th>
<th>€ 330.91 - € 827.27</th>
<th>€ 827.27 - € 1158.17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 5 Kg</td>
<td>€ 4.14</td>
<td>€ 4.96</td>
<td>Free of charge</td>
<td>Free of charge</td>
<td>Free of charge</td>
</tr>
<tr>
<td>5 - 10 Kg</td>
<td>€ 6.45</td>
<td>€ 7.61</td>
<td>Free of charge</td>
<td>Free of charge</td>
<td>€ 8.27</td>
</tr>
<tr>
<td>10 - 15 Kg</td>
<td>€ 8.27</td>
<td>€ 9.93</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Read S.r.o.

Some less vital, but detailed costs are given below, to provide an alternative form of price indication:

Figure 7.5.2 Detailed costs of storage and handling

<table>
<thead>
<tr>
<th>The storage in a general warehouse</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>The storage</td>
<td>€ 0.23 / m² / day</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The storage in a public bonded warehouse</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>The storage</td>
<td>€ 0.30 / m² / day</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The penalty storage in an international groupage service</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>The storage for 0 - 5th day</td>
<td>free</td>
</tr>
<tr>
<td>The storage for 6 - 10th day</td>
<td>€ 0.33 / 100kg / day</td>
</tr>
<tr>
<td>The storage for 11 - next day</td>
<td>€ 1.00 / 100kg / day</td>
</tr>
</tbody>
</table>
The handling

<table>
<thead>
<tr>
<th>Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>The unloading of palletized goods from a road vehicle</td>
<td>€ 0.66 / 100kg</td>
</tr>
<tr>
<td>The unloading of non-palletized goods from a road vehicle</td>
<td>€ 0.82 / 100kg</td>
</tr>
<tr>
<td>The unloading of palletized goods from a rail wagon</td>
<td>€ 0.49 / 100kg</td>
</tr>
<tr>
<td>The unloading of non-palletized goods from a rail wagon</td>
<td>€ 0.66 / 100kg</td>
</tr>
<tr>
<td>The loading of palletized goods from a road vehicle</td>
<td>€ 0.66 / 100kg</td>
</tr>
<tr>
<td>The loading of non-palletized goods from a road vehicle</td>
<td>€ 0.82 / 100kg</td>
</tr>
<tr>
<td>The loading of palletized goods from a rail wagon</td>
<td>€ 0.49 / 100kg</td>
</tr>
<tr>
<td>The loading of non-palletized goods from a rail wagon</td>
<td>€ 0.66 / 100kg</td>
</tr>
</tbody>
</table>

Source: Setto CZ s.r.o.

7.4 Identification of other handling and distribution infrastructure

The service of many companies also includes delivery in whole of the Czech Republic and also in Slovakia. FLOR-EXPRESS-KADAŇ, s.r.o. company is the biggest supplier of big “Do It Yourself” centres and hypermarkets as for example: OBI, Hornbach, Baumax, Globus, Tesco, Kaufland and many specialised wholesalers.

Many companies are able to deliver within 24 hours so that goods get to the customer fresh. The goods are transported to a fully air conditioned central magazine where the flowers coming from different countries can be shifted on delivery trucks that deliver the flowers directly to the customers in different parts of the republic.

7.5 Identification of carriers that transport goods imported from Colombia

During the transportation of fresh cut flowers, they must be kept strictly conditioned. Exporters can either transfer this commodity in special aircrafts or in a personal one.

There is an Association of forwarding and logistics in the Czech Republic. Big transport companies are members of the association. They could be potential

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24 www.florexpress.cz
25 See more in chapter 7.3.
26 For available cargo agents and forwarders refer to the appendix.
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transporters of goods from Colombia. A list of members of this association is divided according to symbols for services provided by the members. Services provided by individual members are indicated by following letters. When transporting goods from the big Dutch harbours and the Dutch flower auction to the Czech Republic, it will most likely be cheaper to use a Czech over a Dutch transporting company.

Figure 7.5.1 Members of the Association of forwarding and logistics in CZ

| A. Full load shipments by road | H. Combined transport’s cargo |
| B. Full load shipments by rail | I. Warehousing |
| C. Consolidated service by road | J. Other logistical services |
| D. Consolidated service by rail | K. Customs services |
| E. Air cargo | L. Express and currier services |
| F. Maritime cargo | M. Our (other) specialities |
| G. River transport’s cargo |

Argo Bohemia s.r.o.
Nádražní 365
356 94 Sokolov
Region: Western Bohemia
Main orientation: A, B, E, F, G, H, J, K

tel: ++420 352 605 970
fax: ++420 352 605 969
e-mail: iva.dvorakova@afgholding.cz
www.afgholding.cz

Argo Intern. Spedition, s.r.o.
U vlečky 2
617 00 Brno
Region: Southern Moravia
Main orientation: A, B, E, F, G, H, J, K

tel: ++420 545 425 921, 545 425 911
fax: ++420 545 425 919
e-mail: randysek@afgholding.cz
www.afgholding.cz

ARGO TRANS s.r.o.
Sokolská 33
772 00 Olomouc
Region: Northern Moravia
Main orientation: A, B, E, F, G, H, J, K

tel: ++420 585 209 010, -11, -13, -14, -15
fax: ++420 585 209 012, 585 209 017
e-mail: roman.spacek@argotrans.cz
www.afgholding.cz

DFDS Transport a.s.
K Vypichu 1119
Komerční centrum
Main orientation: A, B, E, F, G, H, J, K

tel: ++420 311 331 444, 311 331 461
fax: ++420 311 331 440
e-mail: jekl@dfdstransport.cz

80 Proexport Colombia
**252 19 Rudná u Prahy**  
**Region:** Prague and Central Bohemia  
**Main orientation:** A, B, C, E, F, G, H, I, J, K

**DME a.s.**  
DM EXPRESS intl.forwarding  
L.pluku 8 - 10  
186 30 Praha 8  
**Region:** Prague and Central Bohemia  
**Main orientation:** A, B, C, E, F, G, H, I, J, K, L, M  
**Special services:** Projects

**Gebrüder Weiss spol. s r.o.**  
Terminál MENZIES  
P.O.Box 132  
160 08 Praha 6  
**Region:** Prague and Central Bohemia  
**Main orientation:** A, B, C, E, F, G, H, I, J, K, L, M  
**Special services:** Weiss next Day - Inter System

**GYP LOGISTICS, s.r.o.**  
Příkop 838/6  
602 00 Brno  
**Region:** Southern Moravia  
**Main orientation:** A, B, C, E, F, H, I, J, K, L

**HANSEATIC TRANSPORT s.r.o.**  
Vršovická 9  
101 00 Praha 10  
**Region:** Prague and Central Bohemia  
**Main orientation:** A, B, C, D, E, F, G, H, I, J, K, M

**HILTRANS spol. s r.o.**  
Peroutkova 1778/55  
15000 Praha 5  
**Main orientation:** A, B, C, E, F, G, H, I, J, K, M
**Region:** Prague and Central Bohemia  
**E-mail:** hiltrans@hiltrans.cz  
[www.hiltrans.cz](http://www.hiltrans.cz)  
**Main orientation:** A, B, E, F, G, H, K
<table>
<thead>
<tr>
<th>Company Name</th>
<th>Address</th>
<th>Region</th>
<th>Main orientation</th>
<th>Special services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kühne &amp; Nagel s.r.o.</td>
<td>Pekařská 4, 155 00 Praha 5</td>
<td>Prague and Central Bohemia</td>
<td>A, B, C, E, F, G, H, I, J, K</td>
<td></td>
</tr>
<tr>
<td>tel: ++420 257 090 012</td>
<td>fax: ++420 257 090 099</td>
<td>e-mail: <a href="mailto:pavel.sepakj@kuehne-nagel.com">pavel.sepakj@kuehne-nagel.com</a></td>
<td><a href="http://www.kuehne-nagel.com">www.kuehne-nagel.com</a></td>
<td></td>
</tr>
<tr>
<td>Lagermax spedice a logistika s.r.o.</td>
<td>U Prioru 1/1059, 161 01 Praha 6</td>
<td>Prague and Central Bohemia</td>
<td>A, B, C, E, F, I, J, K</td>
<td></td>
</tr>
<tr>
<td>tel: ++420 220 196 111</td>
<td>fax: ++420 220 196 196</td>
<td>e-mail: <a href="mailto:drusped@lagermax.cz">drusped@lagermax.cz</a></td>
<td><a href="http://www.lagermax.cz">www.lagermax.cz</a></td>
<td></td>
</tr>
<tr>
<td>MaM Militzer a Münch CS, s.r.o.</td>
<td>25101 Modletice 98, okres Praha-východ</td>
<td>Prague and Central Bohemia</td>
<td>A, B, C, E, F, I, K</td>
<td></td>
</tr>
<tr>
<td>tel: ++420 220 113 350, 220 113 984</td>
<td>fax: ++420 220 113 378</td>
<td>e-mail: <a href="mailto:martin_motl@mumnet.cz">martin_motl@mumnet.cz</a></td>
<td><a href="http://www.militzer.com">www.militzer.com</a></td>
<td></td>
</tr>
<tr>
<td>Mitsui - Soko (Europe) B.V.</td>
<td>Pražská 180, 250 66 Zdíby</td>
<td>Prague and Central Bohemia</td>
<td>A, B, C, E, F, I, J, K</td>
<td>3PL, JIT</td>
</tr>
<tr>
<td>tel: ++420 296 503 214</td>
<td>fax: ++420 296 503 201</td>
<td>e-mail: <a href="mailto:lubos@mitsui-soko.cz">lubos@mitsui-soko.cz</a></td>
<td><a href="http://www.mitsui-soko.cz">www.mitsui-soko.cz</a></td>
<td></td>
</tr>
<tr>
<td>NHN s.r.o.</td>
<td>Kateřínská 13, 772 00 Olomouc</td>
<td>Northern Moravia</td>
<td>A, B, D, E, F, G, H, J, K, M</td>
<td></td>
</tr>
<tr>
<td>tel: ++420 585 571 125</td>
<td>fax: ++420 585 571 110</td>
<td>e-mail: <a href="mailto:mail@nhn.cz">mail@nhn.cz</a></td>
<td><a href="http://www.nhn.cz">www.nhn.cz</a></td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>Address</td>
<td>Region</td>
<td>Contact Information</td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------</td>
<td>----------------------</td>
<td>------------------------------</td>
<td></td>
</tr>
<tr>
<td>SETTO CZ, s.r.o.</td>
<td>Jana Želivského 2, 130 00 Praha 3</td>
<td>Prague and Central Bohemia</td>
<td>tel: ++420 222 802 111, fax: ++420 222 729 905, e-mail: <a href="mailto:setto@setto.cz">setto@setto.cz</a>, <a href="http://www.setto.cz">www.setto.cz</a></td>
<td></td>
</tr>
<tr>
<td>TRANS-SPED-CONSULT spol. s r.o.</td>
<td>Lukavecká 1, 410 02 Lovosice</td>
<td>Northern Bohemia</td>
<td>tel: ++420 416 532 340, 416 532 234, fax: ++420 416 533 329, 416 532 902, e-mail: <a href="mailto:jan.zidka@telecom.cz">jan.zidka@telecom.cz</a></td>
<td></td>
</tr>
<tr>
<td>Welz Intern. Spedition s.r.o.</td>
<td>U silnice 949, 161 00 Praha 6</td>
<td>Prague and Central Bohemia</td>
<td>tel: ++420 274 021 051, fax: ++420 274 819 913, e-mail: <a href="mailto:spedition@welz.cz">spedition@welz.cz</a></td>
<td></td>
</tr>
<tr>
<td>ZOOM CARGO s.r.o.</td>
<td>Jugoslávských partyzánů 23, 160 00 Praha 6</td>
<td>Prague and Central Bohemia</td>
<td>tel: ++420 233 321 777, fax: ++420 233 321 770, e-mail: <a href="mailto:info@zoom-cargo.com">info@zoom-cargo.com</a>, <a href="http://www.zoom-cargo.com">www.zoom-cargo.com</a></td>
<td></td>
</tr>
</tbody>
</table>

Main orientation: A, B, C, D, E, F, H, I, J, K, L, M
7.6 Alternatives of transport and carriers providing services from Colombia

Figure 7.6.1 Carrier aircrafts from Bogota (Colombia) to Prague (Czech Republic)

<table>
<thead>
<tr>
<th>Airlines</th>
<th>Frequent y</th>
<th>Aircraft</th>
<th>Change of aircraft</th>
<th>Notes</th>
<th>Driving time</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIR FRANCE</td>
<td>MA, JU, VI, SA, DO</td>
<td>A-340-300</td>
<td>PAR</td>
<td>CAP. 2-5 TONS. Conexión en 24-48 horas.</td>
<td></td>
</tr>
<tr>
<td>ALITALIA</td>
<td>LU, MA, MI, JU, VI, SA, DO</td>
<td>MD - 80</td>
<td>MIL</td>
<td>CAP. 1.2 TONS. Tiempo de Transito Bogotá - Praga 60 horas.</td>
<td></td>
</tr>
<tr>
<td>BRITISH AIRWAYS</td>
<td>LU, MA, MI, JU, VI, SA, DO</td>
<td>B-747-400</td>
<td>MIA</td>
<td>CAP. 25 TONS. Conexión en 14 - 22 horas. (Desde Londres conecta en un B-767 CAP. 15 TONS, con conexión a Praga en 3 horas). IMPORTANTE: A partir de febrero 6 opera a través de intermediarios.</td>
<td></td>
</tr>
<tr>
<td>CARGOLUX</td>
<td>Tue, Fri, Sun</td>
<td>B-747-400</td>
<td>Luxemburg</td>
<td>CAP. 60 - 120 Tons. Conexión to all European countries</td>
<td>24 – 60 hours</td>
</tr>
<tr>
<td>K.L.M.\textsuperscript{27}</td>
<td>Tue, Fri, Thu, Sat, Sun</td>
<td>B-737-300</td>
<td>Curacao</td>
<td>CAP. 300 Kg</td>
<td>60 hours</td>
</tr>
<tr>
<td>LUFTHANSA</td>
<td>MA, JU, VI, SA</td>
<td>B-727-200</td>
<td>CCS</td>
<td>CAP. 15 TONS. Tiempo de Transito Bogotá - Praga 72 - 96 horas.</td>
<td></td>
</tr>
<tr>
<td>MARTIN AIR</td>
<td>Mo, Wed, Fri, Sat, Sun</td>
<td>MD-11 B-747</td>
<td>Amsterdam</td>
<td>CAP. 60 - 80 Tons. From Amsterdam are goods transported by trucks to Prague</td>
<td>Bogota - Prague 96 hours</td>
</tr>
</tbody>
</table>

Source: [www.proexport.com](http://www.proexport.com)

\textsuperscript{27} Layover in Amsterdam
7.7 **Modes and systems of transport used for carrying merchandises from the main competing foreign countries.**

Common practice in all competing countries in the transport of fresh flowers is sending products from the country of origin to the Netherlands and then forwarding it to the Czech Republic. Flowers are sent by air transport and then by trucks.\(^{28}\)

7.8 **International Freight or Transportation Costs**

1) **Air transport Bogota - Prague**

The transportation of a package of a 1000 kg of fresh cut flowers costs € 3268.97.

\(^{28}\) For maps see section 7.2
The stated proposal includes export clearing of goods in Bogota, documentation fees, phytosanitary check-up/inspection, handling charges on the airport of Bogota, airfreight Bogota-Prague including all airport fees in Bogota, airport fees in Prague and import clearing of goods in Czech Republic. The price also comprises insurance within the value of the goods amounting to € 33090,67.

The price in this proposal is calculated for transport services of the airline Lufthansa Cargo.

- Frequency of the flight: 5 x a week flight Bogota - Prague
- The flight routing and transfer points: Bogota - Caracas - Frankfurt - Prague
- Length of the flight Bogota – Prague is 2 days.

2) Air transport Bogota - Amsterdam

The transportation of a package 1000 kg of fresh cut flowers costs € 2639,54. The stated proposal includes export clearing of goods in Bogota, documentation fees, phytosanitary check-up/inspection, handling charges on the airport of Bogota, airfreight Bogota-Amsterdam including all airport fees in Bogota. The price in this proposal is calculated for transport services of the airline Lufthansa Cargo.

- The flight routing and transfer points: Bogota - Frankfurt - Amsterdam
- Length of the flight Bogota – Amsterdam is 2 days.

2) Direct air transport Amsterdam - Prague

The transportation of a package 1000 kg of fresh cut flowers costs € 2284,65. The price includes transport fees at the Amsterdam airport with all airport taxes at Amsterdam and Prague airport.

For the transport of fragile goods as flowers, the best means of transport is by air. Other means of transport are highly unsuitable and very risky. Transport from Bogota to Prague is also provided by the airline KLM cargo. Transport from Bogota to Amsterdam is provided except of Lufthansa also by the airlines Air France and KLM Cargo. Fresh cut flowers are transported on carrier’s pallets and in containers.

3) Regular truck transport lines

The most frequent regular lines are:

---

29 Example of transport - FLOR-EXPRESS-KADAÑ, s.r.o company
The Netherlands – (Germany) – Czech Republic (in Holland the goods are loaded from Aalsmeer and Westland), the loading takes place on Monday, Wednesday and Friday, in total 15 trucks a week.

- Danmark – Czech Republic, 2 trucks a week
- Italy – Czech Republic, 1 – 2 trucks a week

If a costumer orders a whole truck, the loading can take place at any place and anytime.

The prices are generally calculated for 1CC container or for a whole truck. The price should include the return premium for the empty trolleys. The price for the commission for transport depends on the distances (mileage), on the set up of loading and unloading, on the volume of the transport and on the regularity of the transport. A regular bulk cargo transport is cheaper per CC trolley than a small irregular order.

## 7.9 Other costs involved in international physical distribution

As mentioned, the only way of transportation is by aircraft and by cooling trucks. It is necessary to transport fresh cut flowers as fast as possible, that is why they are not left in any storehouses and are transported directly from the airport to wholesalers or to an auction. Otherwise the storage is € 0,49/m² per day.
7.10 Physical distribution services address book

<table>
<thead>
<tr>
<th>Name</th>
<th>Contact</th>
<th>Phone</th>
<th>Email</th>
<th>Web page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Airlines</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cess</td>
<td>Miroslav Förster</td>
<td>222730000</td>
<td><a href="mailto:m.forster@cess.cz">m.forster@cess.cz</a></td>
<td><a href="http://www.cess.cz/">http://www.cess.cz/</a></td>
</tr>
<tr>
<td>Intercontinental Cargo Services</td>
<td>Miroslav Nipča</td>
<td>272700460</td>
<td><a href="mailto:mirek@icstransport.cz">mirek@icstransport.cz</a></td>
<td><a href="http://www.icstransport.cz/">http://www.icstransport.cz/</a></td>
</tr>
<tr>
<td>SV Stock</td>
<td>Unknown</td>
<td>312686137</td>
<td><a href="mailto:sv-stock@sv-stock.cz">sv-stock@sv-stock.cz</a></td>
<td><a href="http://www.sv-stock.cz/">http://www.sv-stock.cz/</a></td>
</tr>
<tr>
<td><strong>Customs Storehouses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Customs Agents</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>These services are provided by the freight forwarders or custom storehouses.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| **Authorized Banks**  |                   |                 |                                |                                               |
| Komerční banka        | Unknown           | 800 111 05 5   | mojebanka@kb.cz               | http://www.kb.cz/en/com/profile/index.shtml    |

| **Insurance Companies** |                   |                 |                                |                                               |
| Alianz                | Milan Švarc       | +42060266 1000 | milansvarc@volny.cz           | www.zastupci-allianz.cz/milan.svarc           |
| Generali              | Unknown           | 800150155      |                                | www.generali.cz                               |

| **Surface Carriers**  |                   |                 |                                |                                               |
| Maersk Agencysro.     | Unknown           | +420 257182300 | czesar@maersk.com             | www.maersksealand.com/czechrepublic           |
| Schenker-BTL          | Unknown           | +420311 71111, 501 | marketing@schenker.cz | http://www.schenker.cz/                      |
7.11 Others

The freight forwarders provide full service; including paperwork, tariffing and storing. They communicate pretty fast, so once given an order they are able to present their offer within 2 days. In this offer all information and prices are listed. All other information concerning particular cargo can be gained upon request by email.
8. Recommendations to the exporter

The Czech flower market has seen some turbulent changes in recent years. It evolved from being quite self-sufficient to a market that is heavily relying on import from third countries. Czech local produce cannot keep up with current developments. The climate is not favourable for flower production and the existing greenhouses are all at least 35 years old. At this moment there is no money available for new investments to update these growing facilities.

In the future the Czech market will therefore be more and more dependent on foreign produce of fresh flowers. This may create new possibilities for Colombian flower producers. They however would have to face harsh competition from the established suppliers to the Czech Republic such as the Netherlands. A good way therefore to penetrate the market is to deliver Colombian flowers to the Dutch flower auction in Aalsmeer. This will also give a wider range of cover of European countries that are able to buy these flowers.

If however there is a preference to supply directly to the Czech Republic, this is an option as well. There are various flower wholesalers present all through the country and especially located around Prague. When directly approaching the market it is important to remember that the taste in flowers and their appearance might differ somewhat from the taste in other European countries. Flowers are usually very brightly coloured, as the photo material in the annexes also shows, even sometimes artificially with a colourful, but quite unnatural result. It might be recommendable for Colombian exporters of fresh flowers to adjust their assortment to these wishes.

Because all flowers need to be imported from third countries, prices within the Czech Republic are sky high, especially compared to the level of disposable income. If Colombian exporters are able to offer their prices at a moderate price level, this might offer market potential.

A niche market would, in our opinion, lie with specific exotic flowers that are new to Czech consumers. Flowers such as Anthuriums are basically unknown to this market, but fit well into the Czech habit of buying one separate flower for special occasions. These flowers could be a welcome variation on the roses and carnations usually being given to friends and relatives on special days.
Annexes

Annex 1: Certificate of origin form A

1. Consignor (Space reserved for translation)

No. 000000

Original

(Space reserved for issuing number)

2. Consignee (Space reserved for translation)

EUROPEAN COMMUNITY

(Space reserved for translation)

CERTIFICATE OF ORIGIN

(Space reserved for translation)

3. Country of Origin (Space reserved for translation)

4. Transport details (Optional) (Space reserved for translation)

5. Remarks (Space reserved for translation)

6. Item number; marks, numbers, number and kind of packages; description of goods (Space reserved for translation)

7. Quantity (Space reserved for translation)

8. The undersigned authority certifies that the goods described above originate in the country shown in box 3 (Space reserved for translation).

Place and date of issue, name, signature and stamp of competent authority (Space reserved for translation)
Annex 2: Plant health movement document


| 1. Identification of consignment (1) — This consignment contains produce of phytosanitary relevance — |
| Plant/ plant product or other object (TARIC code): |
| Reference number(s) of required phytosanitary documentation: |
| Country of issue: |
| Date of issue: |
| Distinguishing mark(s), numbers, number of packages, amount (weights/units): |
| Reference number(s) of required customs documentation: |

2. PLANT HEALTH MOVEMENT DOCUMENT No EC)(...)

4. Official registration number of importer:

   1. the undersigned importer, hereby request the responsible official body to carry out the official identity checks and plant health checks of the abovementioned plants, plant products or other objects at the approved place of inspection listed below and I undertake to respect the rules and procedures set by the responsible official body.

   Date, name and signature of importer: ____________________________________________

5.1. Point of entry:

   5.2. Co-signing by official body of point of entry (date, name, service stamp and signature):

6. Approved place(s) of inspection (2)

   A: ____________________________________________________
   B: (replaces A) ____________________________________________

   The plants, plant products or other objects are moved to the abovementioned place(s) of inspection in accordance with the agreement concluded between (2)

   ________________________________

The consignment may not be moved to places other than those listed above unless this has been officially approved.

7. Documentary check
   □

8. Identity check
   □

9. Plant health check
   □

   Place/date: ____________________________
   Name: ________________________________
   Service stamp/signature: ____________________________

   Place/date: ____________________________
   Name: ________________________________
   Service stamp/signature: ____________________________

10. Decision

    □ Release

    Name: ________________________________
    Service stamp/signature: ____________________________

   Indicate EC Plant Passport (serial or week or batch) number when appropriate: ____________________________

    □ Official measure

    □ Refusal of entry
    □ Destruction

    □ Movement outside the Community
    □ Quarantine period

    □ Removal of infected/infested produce
    □ Appropriate treatment

    Remarks: ____________________________

(1) Make reference to country code/number.
(2) Fill in box or make reference to information on Phytosanitary certificate which must be attached.
(4) When appropriate, give details on agreement between Member States' official services, enter on a case-by-case agreement or on the basis of a longer-term agreement.
Annex 3: Phytosanitary certificate

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name and address of importer</td>
</tr>
<tr>
<td>2</td>
<td>PHytosanitary Certificate</td>
</tr>
<tr>
<td>3</td>
<td>Declared name and address of consignee</td>
</tr>
<tr>
<td>4</td>
<td>Plant Protection Organization of: Federal Republic of Germany</td>
</tr>
<tr>
<td>5</td>
<td>Place of origin</td>
</tr>
<tr>
<td>6</td>
<td>Declared means of conveyance</td>
</tr>
<tr>
<td>7</td>
<td>Declared point of entry</td>
</tr>
<tr>
<td>8</td>
<td>Distinguishing marks; number and description of packages; name of produce; botanical name of plants</td>
</tr>
<tr>
<td>9</td>
<td>Quantity declared</td>
</tr>
<tr>
<td>10</td>
<td>This is to certify that the plants, plant products, or other regulated articles described above</td>
</tr>
<tr>
<td></td>
<td>have been inspected and/or tested according to appropriate official procedures</td>
</tr>
<tr>
<td></td>
<td>are considered to be free from the quarantine pests specified by the importing country and to conform with the current phytosanitary requirements of the importing country, including those for regulated non-quarantine pests</td>
</tr>
<tr>
<td></td>
<td>are deemed to be practically free from other pests</td>
</tr>
<tr>
<td>11</td>
<td>Additional declaration</td>
</tr>
<tr>
<td>12</td>
<td>Treatment</td>
</tr>
<tr>
<td>13</td>
<td>Chemical (active ingredient)</td>
</tr>
<tr>
<td>14</td>
<td>Duration and temperature</td>
</tr>
<tr>
<td>15</td>
<td>Concentration</td>
</tr>
<tr>
<td>16</td>
<td>Date</td>
</tr>
<tr>
<td>17</td>
<td>Additional information</td>
</tr>
</tbody>
</table>

Proexport Colombia
### Annex 4: DV1 Form

<table>
<thead>
<tr>
<th>European Community</th>
<th>Declaration of Particulars Relating to Customs Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Name and address of seller (Block letters)</td>
<td>For official use</td>
</tr>
<tr>
<td>2. a) Name and address of buyer (Block letters)</td>
<td></td>
</tr>
<tr>
<td>3. Name and address of declarant (Block letters)</td>
<td></td>
</tr>
<tr>
<td>3. Terms of delivery</td>
<td></td>
</tr>
<tr>
<td>4. Number and date of invoice</td>
<td></td>
</tr>
<tr>
<td>5. Number and date of contract</td>
<td></td>
</tr>
</tbody>
</table>

**Important Note**
- By signing and returning the declaration the declarant accepts responsibility for the accuracy and completeness of the particulars given on the form and on any declaration sheet attached to it and the authenticity of any document produced in support. The declarant also accepts responsibility to supply any additional information or documentation necessary to establish the customs value of the goods.

6. Number and date of any previous customs decision concerning box 7 to 9

<table>
<thead>
<tr>
<th>Enter X where applicable</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>1</td>
</tr>
</tbody>
</table>

7. a) Are the buyer and seller related in the sense of Article 113(1) of Regulation (EEC) No 2454/93?
- No
- Yes

7. b) Did the relationship influence the price of the imported goods?
- Yes
- No

7. c) (Only optional) Does the transaction value of the imported goods closely approximate to a value mentioned in Article 29 (2) (b) of Regulation (EEC) No 2454/93?
- Yes
- No

8. a) Are there any restrictions as to the disposal or use of the goods by the buyer, other than restrictions which:
- Are imposed or required by law or by the public authorities in the Community,
- Limit the geographical area in which the goods may be resold or used,
- Do not substantially affect the value of the goods?
- Yes
- No

8. b) Is the sale or price subject to some condition or consideration for which a value cannot be determined with respect to the goods being valued?
- Yes
- No

Specify the nature of the restrictions, conditions or considerations as appropriate:

If the value of conditions or considerations can be determined, indicate the amount in box 11(b).

9. a) Are any royalties and licence fees related to the imported goods payable either directly or indirectly by the buyer as a condition of the sale?
- Yes
- No

9. b) Is the sale subject to an arrangement under which part of the proceeds of any subsequent resale, disposal, or use accrues directly or indirectly to the seller?
- Yes
- No

### Notes to Box 7
1. Persons shall be deemed to be related only if:
   a) They are officers or directors of one another’s business;
   b) They are employees and employers;
   c) They are members of a firm, association, company or other entity;
   d) They are joint shareholders of the same entity;
   e) They are joint officers or directors of the same entity;
   f) They are joint members of the same family;
   g) They are joint members of the same firm, association, company or other entity;
2. In any case, where the buyer and the seller are related it is not necessary to state the name of a transaction value other than Article 35 (2) of Regulation (EEC) No 2454/93 and the interpretation thereof on the provision in Annex 231.

Proexport Colombia

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### Market Researches in Eastern Europe

#### 9B Proexport Colombia

<table>
<thead>
<tr>
<th>FOR OFFICIAL USE</th>
<th>Item</th>
<th>Item</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Basis of calculation</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 (a) Net price in CURRENCY OF INVOICE (Price actually paid or price payable for settlement at the material time for valuation for customs purposes)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(b) Indirect payments - see box 8(b)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date of exchange:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 Total A in NATIONAL CURRENCY</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>B. ADDITIONS: Costs in NATIONAL CURRENCY NOT INCLUDED in A above (*)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 Costs incurred by the buyer:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(a) Commissions, except buying commissions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(b) Brokerage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(c) Containers and packing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14 Goods and services supplied by the buyer free of charge or at reduced cost for use in connection with the production and sale for export of the imported goods</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The values shown represent an appurtenance where appropriate.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(a) Materials, components, parts and similar items incorporated in the imported goods</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(b) Tools, dies, moulds and similar items used in the production of the imported goods</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(c) Materials consumed in the production of the imported goods</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(d) Engineering, development, artwork, design work and plans and sketches undertaken elsewhere than in the Community and necessary for the production of the imported goods</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16 Royalties and licence fees - see box 9(a)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17 Proceeds of any subsequent resale, disposed of or otherwise accounted to the seller - see box 9(b)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>C. COSTS OF DELIVERY</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 Costs of delivery to</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(a) Transport</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(b) Loading and handling charges</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(c) Insurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19 Total B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>D. DEDUCTIONS:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20 Costs of transport after arrival at place of introduction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21 Charges for construction, erection, assembly, maintenance or technical assistance undertaken after importation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22 Other charges (specify)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23 Customs duties and taxes payable in the Community by reason of the importation of or sale of the goods</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 Total C</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>25 VALUE DECLARED (A + B - C)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(*) Where amounts are payable in FOREIGN CURRENCY, indicate in this section the amount in foreign currency and the rate of exchange by reference to each relevant element and item.

<table>
<thead>
<tr>
<th>Reference</th>
<th>Amount</th>
<th>Rate of exchange</th>
</tr>
</thead>
</table>

---

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# Fresh flowers in the Czech Republic

## Annex 5: Single Administrative Document (SAD)

### European Community

#### Declaration

<table>
<thead>
<tr>
<th>Item</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td><strong>Commodity Group:</strong> No</td>
</tr>
<tr>
<td>3</td>
<td><strong>Commodity:</strong> No</td>
</tr>
<tr>
<td>4</td>
<td><strong>Country of Export:</strong> No</td>
</tr>
<tr>
<td>5</td>
<td><strong>Country of Destination:</strong> No</td>
</tr>
<tr>
<td>6</td>
<td><strong>Country of Origin:</strong> No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td><strong>Notify party:</strong> No</td>
</tr>
<tr>
<td>10</td>
<td><strong>Notify party:</strong> No</td>
</tr>
<tr>
<td>11</td>
<td><strong>Notify party:</strong> No</td>
</tr>
</tbody>
</table>

### Acknowledging Details

<table>
<thead>
<tr>
<th>Item</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>51</td>
<td><strong>Principal:</strong> No</td>
</tr>
<tr>
<td>52</td>
<td><strong>Signatory:</strong> No</td>
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</table>

**Signature and name of the person who prepares the SAD**
Goods are packed in boxes, aquapacks, round and rectangular buckets, proconas and containers. Orders with a certain number of boxes or buckets are put on trollies. This is the best way to preserve the goods during transportation and storage.

To preserve cut flowers, it is used an efficient large refrigeration system with pre-refrigeration compartments, covering an area of over 1,800 cubic metres, with varied temperature control to suit the different products. Loading ramps, which reduce the risk of damage to the merchandise and above all, positively reduce loading times and delivery times.
Figure 4 Refrigeration areas

Figure 5 The Ciesse Flower fleet on the road
Figure 6 Unloading in demand destination

Figure 7 At the wholesalers
Fresh flowers in the Czech Republic
### Annex 7: Companies Directories

<table>
<thead>
<tr>
<th>Companies Directory</th>
<th>Country: Czech Republic</th>
<th>Sector: Fresh Flowers</th>
</tr>
</thead>
</table>

<table>
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<tr>
<th>Página Web</th>
<th>Idioma</th>
<th>Idioma del Contenido</th>
<th>Información General de Empresas Disponible sin Costo</th>
<th>Requiere Registro</th>
<th>Información Adicional con Costo</th>
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</thead>
</table>
| **Directories Europeos** |        |                      | **Contenido:** Nombre de la empresa; País; Dirección; Teléfono; Fax; Sitio Web; Numero de empleados; Fecha de constitución; Capital; No de registro; Identificación del IVA.  
**Descripción:** Información de empresas para 70 Países.  
**Opciones de Búsqueda:** País; Productos/Servicios; Empresa; Sector; Subsector; Marcas; Dirigentes; Códigos. | SI | SI |
| http://www.kompass.com/ | E      | E; I; O              | **Contenido:** Nombre de la empresa; País; Dirección; Teléfono; Fax; Sitio Web; Descripción corta de la empresa y sus productos.  
**Descripción:** Paginas amarillas - Lista alfabética de productos y servicios; lista de empresas; Permite acceder a las páginas amarillas de cada País; Acceso a una pagina de Información de negocios con algunos Países entre los que se encuentran Polonia y Republica Checa.  
**Opciones de Búsqueda:** País; Productos/Servicios; Empresa; Listado de productos; Listado de países; Oportunidades de negocio con algunos países. | SI | NO |
| http://worldyellowpages.com/ | I      | I                    | **Contenido:** Nombre de la empresa; País; Dirección; Teléfono; Fax; E-mail; Sitio Web; Descripción corta de la empresa y sus productos.  
**Descripción:** Paginas amarillas - Lista alfabética de productos y servicios; lista de empresas; Permite acceder a las páginas amarillas de cada País; Acceso a una pagina de Información de negocios con algunos Países entre los que se encuentran Polonia y Republica Checa.  
**Opciones de Búsqueda:** País; Productos/Servicios; Empresa; Listado de productos; Listado de países; Oportunidades de negocio con algunos países. | SI | SI |
| http://www.europages.com/ | E; I; O | E; I; O              | **Contenido:** Nombre de la empresa; País; Dirección; Teléfono; Fax; Sitio Web; Productos/Servicios.  
**Descripción:** Directorio en línea (en 25 idiomas) de la empresas europeas mas dinámicas; Consulta gratuita de las licitaciones publicadas en el diario oficial de la Unión Europea; Directorio impreso (en 6 idiomas) de los compradores europeos mas dinámicos; Directorio en CD-Rom (en 14 idiomas) de la empresas europeas mas dinámicas. Permite contactar las empresa vía intra mail.  
**Opciones de Búsqueda:** Productos/Servicios; Empresa; Temática; País; Sector. | SI | SI |
| **Directores Checos** |        |                      | **Contenido:** Nombre de la Empresa; Dirección; Código postal; Ciudad; Teléfono; Gerente/Administrador; Productos/Servicios; Tipo de empresa.  
**Descripción:** Portal de contacto para negocios entre empresas.  
**Opciones de Búsqueda:** Productos/Servicios; Empresa. | NO | NO |

104 Proexport Colombia
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<tr>
<th>Página Web</th>
<th>Idioma</th>
<th>Idioma del Contenido</th>
<th>Información General de Empresas Disponible sin Costo</th>
<th>Requiere Registro</th>
<th>Información Adicional con Costo</th>
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</thead>
<tbody>
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<td>C; I; A</td>
<td>C; I; A</td>
<td><strong>Contenido:</strong> Nombre de la empresa; Dirección; Ciudad; Distrito; País; Código postal; VAT; Marcas registradas; Empleados; Retorno; Teléfono; Fax; E-mail; Sitio Web; Contacto; Productos/Servicios; Clasificación de la producción. <strong>Descripción:</strong> Información de empresas checas. Permite contactar las empresa vía mail; Permite solicitar Información adicional de las empresas. <strong>Opciones de Búsqueda:</strong> Nombre; Actividad; Región; Tipo de empresa.</td>
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<td><a href="http://www.inform.cz/">http://www.inform.cz/</a></td>
<td>I</td>
<td>C; I</td>
<td><strong>Contenido:</strong> Nombre de la empresa; Dirección; Ciudad; Distrito; País; ID; VAT; Teléfono; Fax; Celular; E-mail; Sitio Web; Contacto y Cargo; Descripción de la actividad; Productos/Servicios; Categorías; Estructura; Palabras clave; Registro comercial; Certificación; Información de importación y exportación; Información financiera (Cifras de Capital, Retorno, Número de empleados, Importación, Exportación); Información de Mercadeo (Fecha de constitución, Tipo de empresa). <strong>Descripción:</strong> Información de empresas checas general e Información de empresas de importación y exportación. Tiene un link de acceso al registro comercial de la empresa. <strong>Opciones de Búsqueda:</strong> Empresa; Exportación/Importación; Texto; Región.</td>
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### Companies Directory
**Country:** Czech Republic  
**Sector:** Fresh Flowers

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<td>C; I</td>
<td>Contenido: Nombre; Dirección; Ciudad; Teléfono; Fax; E-mail; Sitio Web; Contacto/Representante; Teléfono del contacto; Fax del contacto; Tipo de empresa; Oficina de registro; Retorno; Capital; Numero de empleados; Numero de registro; Impuestos ID; Productos/Servicios; NACE; Rama de la asociación a la que esta adscrita la empresa. <strong>Descripción:</strong> Confederación de industria de la República Checa que contiene Información de empleadores emprendedores del sector industrial y de transporte. Link de acceso a: IOE (Organización Internacional de Empleadores'); UNICE (Union of Industrial and Employers' Confederations of Europe); BIAC (Business and Industry Advisory Committee to OECD). Listado de las empresas miembro de la organización. <strong>Opciones de Búsqueda:</strong> Miembros por lista alfabética; Lista completa; Texto.</td>
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<td><a href="http://zlatestranky.cz/">http://zlatestranky.cz/</a></td>
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<td>C; I</td>
<td>Contenido: Nombre; Dirección; Ciudad; Distrito; Teléfono; Celular; Información adicional para algunas empresas (E-mail, Sitio Web). <strong>Descripción:</strong> Directorio telefónico idnes.cz. <strong>Opciones de Búsqueda:</strong> Directorio; Negocios; Texto; Ciudad; Distrito; Dirección; Información requerida; Sector.</td>
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<td>C</td>
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**Directorios por Sector**

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**Idioma:**  
E: Español; I: Ingles; A: Alemán; C: Checo; H: Húngaro; P: Polaco; O: Otros; W: Idioma del Sitio Web