



czech trade focus

NEWS FROM CZECH COMMERCIAL OFFICES IN THE USA / OCTOBER 2002

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ECONOMIC OUTLOOK

Over the period of the first six months of 2002, the Czech Republic's GDP increased by 2.4% and reached \$35.5 billion. Prices increased by 3.2%, while the August inflation rate was at the same level.

Mid-year unemployment stood at 8.7%, 0.8 higher than a year ago. The number of employment seekers was 454.3 thousand and the number of job vacancies was 49.1 thousand, i.e. 9.3 applicants per one vacancy.

Industrial production increased by 4.5%, and sales by manufacturing industries grew by 1.5%. The main factors of growth were increased domestic demand, investment activity, and expansion of companies under foreign control.

The net external trade balance reached CZK 1.282.6 billion, which is an increase in USD terms by 8.7% to \$37.1 billion. At the same time, exports increased by 8.9% and imports increased by 4.8%. The deficit in the balance of trade decreased from \$ 1.3 billion to \$0.7 billion.

The International Monetary Fund reduced its estimate of the Czech GDP growth for next year from 3.7 percent to 3.2 percent, behind the 3.3 percent estimate for the average GDP growth of the EU candidate countries. The relatively low estimate is due to a recession in the EU and the strong Czech national currency's negative impact on exports. According to the IMF, economic growth for 2002 is estimated at 2.7 percent.

TOP CZECH EXPORTS TO THE U.S. / JANUARY- JULY, 2002, \$ MIL

During the period spanning from January – July 2002, Czech exports to the U.S. amounted to \$685.3 million, which is slightly higher than the volume of the previous year. Machinery and mechanical appliances (\$200 mil.) and electrical machinery and appliances are the leading Czech exports (\$110.3 mil.), endorsing the good image of Czech engineering and electrical industry in the U.S. The mid-year figures suggest that in 2002, U.S. imports from the Czech Republic will again reach a value over \$1 billion. The top export commodities, in value over \$10 mil, are:

<i>Office machine parts (parts for printers)</i>	51.0	<i>Electrical capacitors</i>	25.5
<i>Steel & iron and articles</i>	49.2	<i>Furniture (bent wood chairs, chandeliers)</i>	19.2
<i>Glassware & glass beads</i>	35.0	<i>Aircraft parts (structures of helicopters)</i>	15.5
<i>Organic chemicals (incl. pharmaceuticals)</i>	32.7	<i>Turbojets</i>	11.6
<i>Pumps for internal combustion piston engines</i>	31.6	<i>Made-up textiles (clothing, national flags)</i>	11.1
<i>Optical instruments and devices</i>	28.0	<i>Arms and ammunition</i>	10.7
<i>Tractors and public transport vehicles</i>	27.0	<i>Machine tools</i>	10.4

RENUMBERING OF AREA CODES AND TELEPHONE NUMBERS IN THE CZECH REPUBLIC

Beginning September 22, 2002, a renumbering of area codes and some telephone numbers is in effect in the Czech Republic. Please visit www.spt.cz for an online database. Area code for Prague /2/ remains the same.

RENEWAL OF THE GENERALIZED SYSTEM OF PREFERENCES

The Trade Act of 2002 was signed into law by President Bush on August 6, 2002. Title XLI of the Act provides for the extension of the Generalized System of Preferences through December 31, 2006. Accordingly, products entered or withdrawn from a warehouse for consumption on or after August 6, 2002 are entitled to duty-free treatment, provided they meet the requirements of the GSP. The Customs Automated Commercial System has been reprogrammed to accept duty-free entry summaries, effective August 6, 2002.

Entries of merchandise that would have qualified for duty-free treatment made after September 30, 2001 and before August 6, 2002 shall be liquidated or re-liquidated as free of duty, and Customs shall refund duty paid with respect to such entry. The program relates also to goods imported from the Czech Republic. Importers who filed their entries via Automated Broker Interface (ABI) with Special Program Indicator (SPI) should receive duty refunds within 12 weeks of August 6, 2002. Importers are advised to contact the appropriate customs port of entry and inquire about the status of the refunds if they are not received within the specified period of time. For general questions regarding the GSP program, contact Ms. Aiene Lugo of U.S. Customs at 202-927-4183. According to the US Department of Commerce, the Czech Republic will be subject to exclusion from the system due to the country's entry to the EU, which is expected in January 2004.

FLOOD RELIEF ASSISTANCE FROM AMERICAN COMPANIES

The Embassy of the Czech Republic in the USA acknowledges the assistance provided by American companies in the Czech Republic to those who suffered from the largest floods in the nation's history in August 2002, particularly in the capital city of Prague. According to AmCham (the American Chamber of Commerce in Prague), the Chamber's members provided corporate financial contributions, employee donations, or material help (foodstuffs, furnishings, cleaning products, vaccines etc.) in total value of 53.8 million CKZ (approx. \$1.8 million). Among the major contributors are Eastman Chemical, Procter & Gamble, Colgate-Palmolive, 3M, Phillip Morris, Ahold Czech, Citibank, KPMG, Federal-Mogul Friction Products, Coca-Cola, Pfizer, Marriott Hotels, Amway International, Master foods, Microsoft, SC Johnson, Pharmacia, Dun & Bradstreet, and Marsh.

In addition to this, Microsoft Czech replaced all legal software products and Citibank provided low-interest loans to the victims of the floods.

UPCOMING EVENT: ENERGY EFFICIENCY BUSINESS WEEK PRAGUE 2002

The 8th International Conference and Exhibition EEWB 2002 will be held in the Prague Congress Center from November 5 – 7, 2002. EEWB is a major Central and Eastern European conference focusing on the efficient use of energy. The conference is aimed at "Opportunities for profitable investment" and presents information on possibilities in energy efficiency and renewable energy that are both technically achievable and cost-effective. The conference and exhibition will provide a traditional meeting point and experience-exchange forum for experts from various professions – entrepreneurs and top industrial and energy managers, investors, municipal and national government decision makers, as well as technological and energy professionals. The conference will also provide a space for sharing international knowledge and expertise and enable personal contacts to be made among local and foreign specialists. To attend the Conference, please register at: www.svn.cz or www.ebw.cz.

FOCUSED ON: CZECH MACHINE TOOL AND FORMING MACHINE INDUSTRY

AN OVERVIEW FOR THOSE WHO MISSED THE CZECH BOOTHS AT THE IMTS SHOW IN CHICAGO

Introduction

The tradition and quality of machine tools and forming machines have always ranked Czech manufacturers highly among advanced countries. Metalworking machine tools and forming machines belong to core branches of the Czech industry. With high export volumes, both are traditionally dependent on foreign markets. As a result of FDI in Czech manufacturing, Czech imports have also been on the rise. The machine tool and forming machine industry constitutes a large share of Czech engineering production and ranks among the most competitive of Czech exports on the world's most competitive markets.

Classification

Metal working machine tools and forming machines, as defined by the Harmonized System of Classification and Numerical Marking of Goods (HS/CS), are:

- 8457 – Machining Centers, modular machines
 - 8458 – Lathes
 - 8459 – Machines for drilling, boring and milling
 - 8460 – Machines for grinding, honing and lapping
 - 8461 – Machines for planning, broaching, gear shaping and hobbling, and sawing
 - 8462 – Metal forming machines – presses, hammers, bending machines, shears and punching machines
 - 8463 – Other metal forming machines – draw benches, thread rolling machines, drawing machines.
- Groups HS 8456 – 8461 represent machines for metal cutting (machine tools), groups HS 8462 – 8463 represent machines for planar and dimensional cold and hot forming (forming machines).

The above nomenclature corresponds with that used in the EU countries and the European Association of Machine Tool Manufacturers (CECIMO), of which the Czech Republic is a member.

Production Range

The range of machine tools and forming machines, produced by almost 130 Czech firms with about 21,100 employees, is broad and diversified. Czech firms manufacture many types of lathes, milling machines, horizontal boring machines, machining centers, boring machines, point grinders, internal grinding machines, sharpeners, band saws, racking machines, single-purpose machines, etc. Most of the machines have CNC - numerical control, their standard is high, and they are fully competitive in the world market. The forming machines include hydraulic presses, eccentric presses, forging presses, hammers, cross-rolling machines, and scrap metal processing equipment, etc. The Czech Republic holds 7-8th place in European statistics of the largest manufacturers of machine tools and forming machines and 14-16th place in the world. The production is designed for the most discerning of clients – the automotive and aircraft industries, IT manufacturers, and

the consumer industry. In 2002, sales of new machines without accessories, spare parts, and general repairs reached 355.1 million.

Foreign Trade

Exports hold a permanent share of produced goods ranging between 80 and 90 percent. Czech manufacturers have always been and remain dependent on export. Almost all additionally manufactured products are exported. The strong competition in the area of machine tools and forming machines constantly motivates our manufacturers to apply the latest technologies. Exports by Czech producers of machine tools and forming machines have been rising steadily since 1997. The main partners of Czech firms are clients in the EU and NAFTA countries. Germany firmly holds first place with purchases worth \$131.1 million last year, followed by Italy with sales valued at \$36 million, **the USA with \$35.6 million**, Slovakia with \$14.9 million, and Austria with \$12.3 million. In 2001, total Czech exports of machine tools and forming machines without accessories, spare parts, and general repairs amounted to \$349.6 million.

Perspectives of the Sector

The Czech designers' strong points have traditionally been classical mechanical engineering which, combined with modern technologies and management methods, positions Czech-made machine tools standards at the top of the world market of engineering products. This confirms the high volume of exports. Czech firms have improved their marketing, their understanding of the customer's needs, their sales, and their after-sales services. Machine tool manufacturers are expected to solve clients' technological requirements, and this is made possible by flexible production to order. Czech machine tool builders are capable of competing by price, but also by technical parameters and delivery terms, including back-up services. Even under increasing competitive pressure, Czech firms keep pace with advanced rivals due to their rapid introduction of IT technologies, new designs and materials. The weight of hardware is being reduced, and computing technology has increasingly more uses (engineering software) not in the CNC control machines, but also in partial components (drives, clamping devices, instruments, etc.). Cutting tools have increased speed and are more environmentally friendly (lower use of lubricants, cleaner operating areas). An important trend is the search for new methods of obtaining and satisfying clients – from the manufacture of machines according to specific client requirements, to a modular series allowing the shortest manufacturing times. The high technical standards of Czech machine tools and forming machines are recognized in many industries, including the automotive and aircraft industries. Czech machines operating in plants of such leading firms as Boeing, GEAF, British Aerospace, Rolls-Royce, SAAB, Volkswagen, Pratt & Whitney, Thermo King, Wyman Gordon, Toyota, Nissan, Kawasaki, and others.

FOCUSED ON: CZECH MACHINE TOOLS IN THE U.S.

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COMPANIES & BUSINESS

>Ostrava-Mosnov airport investment signed

European Central Aviation (ECA), a group of investors from Iceland, signed a Kč 620 million (USD 20 million) investment in the aircraft repair center at the Ostrava-Mosnov airport. Construction of the repair hangar should start this December and will be carried out by the ZS Brno firm. BAE System-Saab will provide the financing for this ECA project. The company should begin operation next fall. In the first phase, ECA plans to employ about 40 local workers and within next three years, the company plans to expand to 250 employees. The factory should be able to handle repairs of some 100 planes a year and (besides Boeing planes) will specialize in repairs of the newest transport plane, the Airbus A 380, currently under development. The airport, which has the longest runway in the country, is still state-owned through the Czech Airport Authority, but the region would like to privatize it as soon as possible.

>Black & Decker, the American power tool manufacturer, have inaugurated their new plant for the production and assembly of power tools in Trmice, near Usti nad Labem, Czech Republic. Black and Decker's strategic decision to open the manufacturing plant and invest in the Czech Republic is key in ensuring that their competitive edge is maintained in the European marketplace. One of the decisive factors in choosing the Czech Republic was its good logistical links to the European Union, said Mr. Stewart Wingate, Plant Manager, Black and Decker (Czech) at the opening.

>Sandra Textile Mills invests in the Czech Republic

Sandra Textile Mills plans to launch construction of a new Kč 6 billion (app. USD 190 million) textile plant in Chlebovice in the Frydek-Mistek region (northern Moravia) of the Czech Republic, the largest project in the country's textile industry. The plant, which will produce goods exclusively for the U.S. market, will create 2,500 jobs.

>Waste Technology

The U.S. government approved a USD 300,000 grant to the Czech company PDI for developing the plasma gasification of waste products. The technology can dispose of any substance, including depleted nuclear fuel. PDI is to conclude a contract with the U.S. company Solena that will work out a feasibility study on a gasification project with the annual capacity of 160,000 tons of waste.

>American Rockwell Automation company buys Czech firm SPEL

The American company Rockwell Automation has bought system integration, an engineering solution division of the company SPEL in Kolin. The main target of this transaction is to strengthen the position of Rockwell in Central Europe. As a supplier of complex industrial solutions, the new subject Rockwell Automation Services believes to acquire contract from consortium Toyota/Peugeot, which plans to launch construction of automotive plant in Kolin. Rockwell employs 23,000 people in 80 countries and its last year receipts were USD 4.3 billion. The Company believes that Rockwell Automation Services will boosts its earnings by USD 20 million.

>Brisk Tabor is prepared to enter the North American market

After three years of long market research, the Czech joint stock company Brisk Tabor has decided to seize the markedly U.S. and Canadian market. The only Czech and leading European supplier of sparkling plugs (igniters), Brisk Tabor produces 40 million pieces yearly, 80 percent of them for export. The estimate of the North American market capacity is approximately 100,000 igniters per year. There is demand not only for motorcycles and car plugs, but also for so-called garden engines, as well. Brisk already supplies the American firm Gator with "garden" plugs for distribution. Brisk has achieved revenues of Kč 584 million (app. USD 19 million) this year.

>Earth Tech, Long Beach, CA announced the acquisition of KAP, a \$15 million environmental consulting and engineering firm based in

Prague. KAP employs more than 300 professionals in six offices in the Czech Republic, and also owns three subsidiaries throughout the country: GHE, AQ-Test and SEPA. KAP was established in 1990 as one of the first private firms in the former Czechoslovakia. The

company provides consulting and engineering services to clients in Central and Eastern Europe, Russia, the European Union, and Southeast Asia. KAP's services include groundwater and soil remediation, environmental audits and reviews, environmental impact assessments, geographic information systems, geological surveys and modeling, waste management and water treatment projects, and laboratory analyses. "With the acquisition of KAP, Earth Tech expands its presence in Central Europe," said Diane C. Creel, president of Earth Tech. "We look forward to offering our full suite of services in this part of the world and to capitalize on KAP's expertise in this marketplace."

>The Czech Consolidation Agency (CKA) announced last week that its public tender for the purchase of a Kč 38 billion (\$1.2 billion) package of non-performing loans left-over from the clean-up of the Czech banking sector was won by the local company EC Group. The agency and EC Group's backer, Gutmann Praha—a daughter company of Austrian investment bank Bank Gutmann AG—say that extensive due diligence has showed that EC Group is transparent and above-board. EC Group bid far more (Kč 4.25 billion) than either the Goldman Sachs/Flow East consortium (Kč 1.6 billion) or the PPF/CS First Boston consortium (Kč 2.45 billion) in the first round of the tender. In the second round, EC Group bid some Kč 3.4 billion; Goldman Sachs/Flow East offered Kč 2.909 billion and PPF/First Boston Kč 2.903 billion. CKA representatives welcomed the result.

>One year after the Dutch-Korean company LG. Philips Displays opened its \$200 million TV tube plant and put Hranice na Morave on the business map, the central Moravian town is for the most part basking in the benefits from the biggest single greenfield foreign investment in the country. Unemployment has fallen, though maybe not by as much as hoped for by the inhabitants of the town that has a population of 15,000. New flats have sprung up and roads have been laid, partly helped by investor-friendly state funding.

>Mölnlycke Health Care opens a new plant in Karvina. The facility will produce custom-made surgical sets for hospitals all over Europe. Custom-made surgical sets are used in the acute healthcare sector and contain all the single-use products needed to perform certain surgical procedures. The market in Europe is expanding very quickly, recording an annual growth of 20% for the past five years. Mölnlycke Health Care, with headquarters in Göteborg, Sweden, ranks among the top manufacturers of single-use products for surgical interventions and wound care.

>Japanese Denso Airs Co. Ltd. Corporation will build a new factory in Liberec to manufacture aluminum tubes for automotive air-conditioning systems. "Denso Airs Co Ltd. has established a 100% subsidiary in the Czech Republic which will be called AIRS Manufacturing Czech, s.r.o. (AMCZ). This new plant will be our first manufacturing facility outside Japan and its main customer will be Denso Manufacturing Czech, s.r.o., which is already in the Czech Republic - also in the Liberec zone - and whose factory is now under construction," commented Keiichi Takemoto, European Division Director of Denso Airs Co Ltd, adding that "the new factory is expected to start full production in October 2003."

>Japanese-based FUTABA Industrial Co., Ltd. is planning to invest \$45 million (CZK 1.397 billion) into the construction of a new manufacturing plant in Havlickuv Brod, East Bohemia. "Our decision to build a new plant in this region in particular was based mainly on the quality business climate in the Czech Republic, the logistic proximity to major European auto makers as our customers and, last but not least, the well prepared industrial zone," commented Mr. Itsuo Kozuka, president of FUTABA Industrial Co., Ltd., adding that "a major part of the product line will be components for stamping press parts and exhaust systems for the automotive industry."

>Aisin Europe S.A., the European subsidiary of Japanese-based Aisin Seiki, will build a new factory in the Pisek industrial zone to produce engine related components for the automotive industry. The company will invest \$12 million to produce water pumps and oil pumps for car engines. "One of the reasons for selecting Pisek for our new

plant is the successful cooperation between Aisin and CZ Strakonice," says Osamu Tajima, Managing Director of Aisin Europe. Aisan Bitron Czech, s.r.o., has officially opened their new plant in Louny, Czech Republic. Aisan ranks among the major Japanese automotive

component manufacturers. The company was founded in 1938 and currently has 8 plants manufacturing complete fuel systems worldwide. Their major customers include Toyota, Daihatsu, Mitsubishi, Suzuki, Mazda, Yamaha and Nissan.

EU WATCH

Entry to the EU is still a positive prospect for citizens of the Czech Republic

As of June 56 % of citizens supported the Czech Republic's efforts to integrate itself into the European Union. This emerged from research conducted by the Center for Public Research of the Sociological Institute of the Czech Academy of Science (<http://www.cvvm.cz>). These results tally with long-term trends and have not changed significantly since the most recent similar research carried out in April 2002. If a referendum were held on the entry of the Czech Republic to the EU, close to 60 % of residents would participate in it. The main supporters of entry to the European Union are those who support the right wing parties, citizens of large towns and high school and university students. The research has shown that 54 % of citizens support integration to the EU because they think it will bring a better standard of living, 42 % because they will be able to work freely within the EU, and 39 % because they believe that it will give the country an economic boost.

INVESTMENT UPDATE

Development of foreign direct investment

Despite the recession in the global economy, the Czech Republic continues to sustain a high volume of inflow of foreign direct investment, according to the Ministry of Industry & Trade.

For the first half of 2002 the volume of investment in manufacturing in the Czech Republic is at the same level as the same period last year, despite the worldwide decline. This positive trend is also sustained among projects facilitated by CzechInvest, where the total volume of announced investment even slightly rose. This growth was also registered in the number of newly created jobs and the inflow of foreign direct investment to the Czech Republic this year should reach about 6 - 8 billion USD. CzechInvest's investment projects should represent around 1 billion USD of this - that is unless we succeed in getting another large investor.

Japanese firms in the CR

There are now 103 Japanese companies registered in the Czech Republic, including 53 trading companies, 46 manufacturers, and 1 R&D company. Another 26 potential Japanese projects are currently in the negotiation stage. Japanese investors altogether have committed to invest a total of 1.98 billion USD and create 22,150 direct new jobs, and all companies are planning further expansion and reinvestment in the future. Investment incentives have been granted to 16 Japanese investors, while another 9 are in the application process.

Unions in the Czech Republic - Partners, not a hurdle for foreign companies

The entry of major foreign investors on the Czech market is undoubtedly a mutually beneficial step. Investors bring work, technology, and growth to the economy. They do not come to the Czech Republic out of love for the country, but for the advantages that are offered to them. Investors receive a series of benefits here - investment incentives and other financial concessions. What awaits them in the Czech Republic is a flexible and educated work force and the ability to create profits. The first investors to come in the 1990s behaved towards their employees in the same way that they were accustomed to behaving in their home countries. They were cognizant of the fact that good working conditions and a friendly atmosphere between the employer and the employees has an important influence on a company's prosperity. They sought out contact with unions and were interested in collective bargaining. After several years, the situation has changed. Now, the economic vocabulary has expanded to include such terms as "mobbing," "bossing" and "bullying." A hostile atmosphere has been

Adoption of EURO

CNB Governor Zdenek Tuma has confirmed Finance Minister Bohuslav Sobotka's statement that the Czech Republic could adopt the Euro before 2009. Tuma cited 2007 as a realistic date. By the end of 2002, the bank and the ministry should devise a strategy of the Czech Republic's accession to the single European currency, which is conditioned by a maximum of a 3% share of the public finance deficit in GDP. In 2006, the government expects a deficit ranging from 4.6% to 5.1% of GDP.

created towards unions and in many places, those attempting to establish unions have even been punished by losing their jobs! Productivity rises not only through flawless work organization but also through unpaid overtime and wage stagnation. Persistent problems occur in retail chains. The situation has reached such a state that in April of this year, the Czech and Moravian Confederation of Unions (ČMKOS) asked the Government to include language in the materials for granting investment incentives that will reflect labor legislation and international legal documents valid in the Czech Republic. It cannot be permissible for a foreign investor operating in the Czech Republic to not abide by and respect the country's legal order. The International Organization of Labor organized a seminar one month ago in the Czech Republic on employee issues in retail chains.

The position of every country and its inhabitants is given not only by its economic strength but also by how society functions and what kind of employer-employee relations prevail. The ČMKOS is concerned with making these relations the best possible. It can assure all foreign investors that cooperation with Czech unions is always very tactful and beneficial for both parties. Respect for the Czech legal order, however, is an essential prerequisite for such cooperation.

Accenture: "We've hired 200 specialists in Prague already"

"Accenture's center for outsourcing shared financial and accounting services, which opened in Prague last October, was the second pilot project in strategic services to be approved for investment incentives by the government. The incentives are in the form of a subsidy for business activity amounting to one half of the tax liability and are limited both by the maximum allowable intensity of state aid and by a time limit of 10 years. The condition for using the incentives is that a minimum of 200 jobs must be created for highly qualified employees within three years. Accenture met this condition within six months.

Jaime Falcao, a partner at Accenture, commented, "Since last October we have hired 200 highly qualified staff who among them use a total of 9 languages to interact with the different countries supported by the Center. We plan to create at least another 300 job opportunities for people with university and secondary school education." The Prague center currently provides financial and accounting services to two global clients (a leading specialty chemicals company and an automotive parts manufacturer) with significant pan-European operations. It currently serves these clients across nine European countries and there are plans to expand the services provided in the future to include human resources, procurement, and customer relations' management.

US CAR MANUFACTURERS MAY BE MISSING FINAL OPPORTUNITY / by R. Novak, Czechinvest CA

The Czech automotive industry has traditionally been one of the key sectors of the national economy, as well as one of its major employers. After 1990, the production of passenger cars flourished due to Volkswagen's timely investment in Skoda Auto.

In recent years, the Czech Republic has been extremely successful in attracting further foreign investment into the automotive sector. As a result of existing traditions and a strong inflow of foreign direct investment, the Czech Republic currently has some 270 automotive suppliers. More than half of the global top 50 automotive parts manufacturers have already established at least one plant in the Czech Republic. In total, the Czech automotive sector employs over 130,000 people: 31,000 in the manufacture and assembly of vehicles and just under 100,000 in the production of automotive components.

US companies like Johnson Controls, Visteon, TRW, Dura Automotive, Delphy Packard, Hayes Lemmerz, Textron, Parker Hanifin, Torrington, Tenneco, and Wagon Automotive already have their manufacturing facilities in the Czech Republic.

Belgium is the world leader in the number of cars produced per capita. According to this indicator the Czech Republic, with 4.43 cars produced per capita in 2000, has good potential for additional car production. This potential will not even be exhausted in 2005, when the production of 7.82 cars per capita is expected. However, there is an even more relevant indicator – the number of cars produced per worker in the industrial sector. The results of a comparison with Belgium based on this indicator are as follows:

Country	Passenger car production	Labor force (total number employed)	Vehicles produced per 100 inhabitants	Total vehicle production	Labor force in industry and construction	Cars produced per 100 industrial employees
Belgium	924,613	4,340,000	9.88	1,013,700	1,085,000	85.22
CZ , 2000	450,911	5,203,000	4.43	455,670	2,081,200	21.67
CZ , 2005	800,000	5,203,000	7.82	805,000	2,081,200	38.44

The percentage of workers in the industrial sector is higher in the Czech Republic than in any other developed country. This percentage is nearly twice as high in the Czech Republic than in Belgium. A comparison of the number of cars produced per worker of the industrial sector indicates that the total potential of the Czech Republic for car production can be estimated at 1.8 million units annually. This creates space for an additional 1 million units that could be produced by a third carmaker located in the Czech Republic.

Therefore, it is realistic to say that the Czech Republic is capable of hosting one more car plant even after the Toyota/PSA plant starts production in 2005. Unlike the aggressive investments we have seen from US automotive components manufacturers, or the recent investment of SDC International that bought the Czech traditional truck producer Tatra Koprivnice, US car manufacturers may be missing their last opportunity to produce their product in the most established and lucrative automotive region in Europe.

CZECHTRADE INTRODUCES CZECH PRODUCTS

Health Food Supplements

F & N dodavatele Ltd., Kostelec n/L, Czech Republic, is a leading Czech manufacturer and exporter of non-nutritive sugar substitutes. The range of its product line and quality, as well as its competitive prices, has made F&N one of the fastest growing companies of its kind in Central Europe. F&N's main customers include people with diabetes and people who want to reduce their sugar consumption. The company's products are mainly tabletop sweeteners similar to saccharin, aspartame and acesulfam K. F&N also produces fructose, dextrose, and sorbitol, as well as mixtures of non-nutritive sugar substitutes in packages for the retail market. Besides this main business activity, they also produce various mineral and vitamin mixtures in powder or tablet forms. The company is expanding its market to include the United States. F&N would welcome the opportunity to introduce you to their line of non-nutritive sugar substitutes at the 5th Americas Food & Beverage Show, Booth #837, scheduled for December 4-5, 2002 in Miami, FL. For more information, please visit www.fankostelev.cz.

Matches and fire starters

It has been more than 160 years since the first matches were made in the town of Sušice, Czech Republic and it has been nearly 100 years since SOLO, the share holding company, has been established. Today, the company is primarily concerned with the production of matches and operates on an international basis. SOLO produces more than 320

Johnson Controls Automobilové Součástky s.r.o. is one of four JCI production subsidiaries in the Czech Republic that collectively employed around 2,300 people in mid-1999. Aside from its manufacturing plant, Visteon runs its only R&D Center in Europe for its lighting business in the Czech Republic. Autopal also runs Engineering Centers for Lighting and for Climate Control & Fluid Control, both of the latter being the only ones of their type in Europe.

The Consortium of Toyota Motor and PSA Peugeot/Citroen is just beginning to invest in a car manufacturing facility in Kolin, which will produce up to 300,000 vehicles annually after 2005. Along with the Skoda production, this will raise the total amount of cars produced in the Czech Republic up to 800,000 units annually.

This fact has initiated discussions about whether or not the Czech Republic is capable of hosting additional car manufacturer(s).

When comparing car production in selected developed countries with their labor markets, we can see that the Czech Republic most closely compares to Belgium.

Belgium is the world leader in the number of cars produced per capita. According to this indicator the Czech Republic, with 4.43 cars produced per capita in 2000, has good potential for additional car production. This potential will not even be exhausted in 2005, when the production of 7.82 cars per capita is expected. However, there is an even more relevant indicator – the number of cars produced per worker in the industrial sector. The results of a comparison with Belgium based on this indicator are as follows:

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CZ , 2005	800,000	5,203,000	7.82	805,000	2,081,200	38.44

million boxes per year, representing 14 billion flames. SOLO supplies over 110 million boxes per year (85 % of the entire Czech market) to the domestic market. This powerful position is due to the steady demand for a range of standard brands led by THE SCISSORS, followed by THE KEY. European customers have branded matches for such supermarkets as AHOLD, REWE, TESCO, KAUFLAND, CARREFOUR, GLOBUS, DELVITA, SPAR etc., as well for the English supermarkets such as TESCO, ASDA, BEST IN, and many more. Recently, SOLO has been exporting to many countries overseas to continue the company's long-term export strategy. Presently, more than 70% of their production capacity is exported. SOLO's production range complies with the European Standard EN 1783 : 1997 : SAF that should protect US importers and their customers. SOLO production for households, fireplaces, advertising, barbecue matches, and fire starters is expanding its market to include the United States. CzechTrade Miami is preparing a business visit for company representatives in November of 2002. For more information, please visit www.solosirkarna.cz.

Car mats for personal cars, trucks, off-road and other special heavy vehicles

ZPV, a leading supplier of car mats for personal cars, trucks, off-road and other special heavy vehicles to OEM and the aftermarket, is preparing several strategic acquisitions in order to reduce costs and

increase its technological capacity. The strategy is aimed to raise the annual capacity from 600,000 sets to one million sets. ZPV has significant research, development, engineering and product design capabilities. The company developed over 100 newly designed models for use in middle and high-class vehicles. ZPV successfully continues to explore the development of interior mats and rubber and rubber-textile boot mats through the use of its large area moulding technology. ZPV was established in 1993 as a direct supplier to the automotive industry and was certified according to the ISO 9002 and VDA 6.1. ZPV is expanding its market to include the United States.

As of September 2002, **Czech products are being sold at the prestigious Art Institute of Chicago**. The Museum chose to order products from nine Czech manufacturers of crystal, glass, Christmas ornaments, marionettes and garnet jewelry for its own net of shops, catalogues (with a circulation of 2.9 million) and web site www.artinstituteshop.org. The first order from the Czech Republic exceeded USD 35,000, and re-orders have already been placed. CzechTrade coordinated the whole process – starting with ‘products and manufacturers identification,’ all the way to the logistics of the museum buyers traveling to the Czech Republic.

TO CONTACT CZECHTRADE, PLEASE SEE CONTACT DETAILS ON THE LAST PAGE OF THE CZECH TRADE FOCUS.

CZECH COMPANIES LOOKING FOR PARTNERS, REPRESENTATIVES, IMPORTERS, DISTRIBUTORS

Modular Electronic Devices

ELKO EP is looking for distributors of Modular Electronic Devices including Time Relays, Power Relays, Memory Relays, Monitoring Voltage Relays, Monitoring Current Relays, Thermostats, Relay Monitoring Power, Level Switch, Dimmers, Signaling and Controlling Devices, and Power Supply Voltages.

ELKO EP
Tovarni 1613
769 01 Holesov
polcar@elkoep.cz
www.elkoep.cz
Mr. Jiri Polcar

Packaging and Food Processing Machines

ASTRO Vlasim is looking for US agents on a commission basis.
ASTRO Vlasim
Divisovska 328
258 01 Vlasim
Tel. 420-303.843813, fax 420-303.845244
Mr. Dan Fiser, Sales Manager
www.astro-vlasim.cz

Heavy machine tools

SKODA Machine Tool, a manufacturer of heavy machine tools, is looking for cooperation with U.S. partners.
SKODA
Tylova 57
316 00 Plzen
phone.: (+420-19)773-2788
fax: (+420-19)773-4427
janousek@smt.skoda.cz
www.skoda.cz
Mr. Lubos Janousek, Sales Director

Machine Tools

Znojemské strojirny Co. specializes in CNC and universal milling and turning, CNC machining centers.
Znojemské strojirny
Tovarni 11
670 11 Znojmo
Tel: +420-624 224841
Fax: +420-624 224610
straka@strojirny.cz
www.strojirny.cz
Mr. Antonin Straka

Bending machines and moulds for plastic tubes

MSV SYSTEMS CZ, a company with a significant position on the Czech market in the area of bending machines and moulds for plastic tubes for fuel, brake, and air-

condition lines in the automotive industry, is seeking a strategic partner for US activities.

MSV SYSTEMS CZ
Svermovna 268
460 10 Liberec
Tel: +420 48 6131 180-3
Fax: +420 48 6131184-5
msv@msv-systems.cz
www.msv-systems.cz
Mr. Miroslav Krejcirik

Food Processing Machines

Manufacturer of machinery for the food-processing industry, including slaughter houses, complete equipment lines for meat production, cutting rooms, stock rooms and cold-storage rooms, stainless dewatering systems, stainless furniture, custom production, production of manipulation equipment, complete industrial plants.
Strojirna Palava s.r.o.
Havirska 1572
Kladno 272 01
Tel.: +420 625 503 265
Fax: +420 625 510 245
info@s-palava.cz
www.s-palava.cz
Mr. Jan Pasek

Steel structures

Czech company looking for business partners in the field of steel structures.
RESTA s.r.o.
Matuskova 6
736 01 Havirov
Tel./Fax: +420 69 688 78 87
resta@raz-dva.cz
Mr Martin Pastor

Home and Commercial Furniture

Kovarik Furniture Co. manufactures over 260 types of pure spruce wood furniture for homes and commercial facilities.
Kovarik Furniture
Vodni 4201
760 01 Zlin
Tel.: + 420 - 67 7212334
Fax: + 420 - 67 7211042
kovarik@avonet.cz
www.ikovarik.cz
Ms. Iveta Korenkova

Czech porcelain and glass

Traditional Czech porcelain and glass manufacturer with a tradition of 150 years is looking for business partners for the

distribution of their products in the US market.

Royal Dux Bohemia
Sadova 1414
419 42 Duchcov
Tel.: + 420 - 417 835261
Fax: + 420 - 417 835416
rodux@royaldux.cz
www.royaldux.cz
Ms. Blanka Hatasova

Glassware

This Czech trading company is looking for partners to import and distribute Czech glass items.
E.R.Trade
Beskydska 794
739 61 Trinec
Tel.: + 420 - 659 331 809
Fax: + 420 - 659 338 945
erep@quick.cz
www.export-import-ertrade.cz
Mr. Edvard Repistak

Custom-made clothing on OEM basis

Textile company offers sewing services for producing clothing (dungarees, tableclothes, bed sheets etc.); this company also produces commercial textiles (canvases, tents, foil-greenhouses, tarpaulins, etc.).
TKD Sedliste
Sedliste 376
739 36 Sedliste
Phone: + 420-658-658 172
Fax: + 420-658-658 158
TKD_Sedliste@centrum.cz
Mr. Petr Kornia

Cotton fabrics

TEPNA Co. offers cotton shirting, blended fabrics - cotton/flax, cotton/viscose, and yarns at very competitive prices.
Plhovska 290
TEPNA
547 46 Nachod
Phone: + 420-491-442 155
Fax: + 420-491-426 343
marketing@tepna.cz
www.tepna.cz
Ms. Zuzana Kalfusova

Glass stones

Glass stones in various shapes, fire-polished (Faceted) and pressed glass beads of the highest quality.
Ladybird Company & JM Koral, s.r.o.
Novy Zlicich 732
Prague 5 150 00

tel., fax: 0042 2 51555169, 0605 55 00 00
www.ladybird.cz
info@ladybird.cz
 Ms. Hana Kalinova

Home Furniture

Czech furniture manufacturer offers office, kitchen, bedroom furniture and dining sets, tables, chairs, wardrobes and garden furniture.

TOSTA
 Zeranovice 216
 769 01 Holesov
plr@seznam.cz
www.tosta.cz

Wooden toys and hobby kits

WALACHIA
 Dolni Ves 40
 763 16 Zlin
 phone: (+420-603)512-380
 fax: (+420-67)791-2918
walachia@walachia.com
www.walachia.com

Mr. Petr Hruza

Footwear

FARE Co., a manufacturer of children's, youth, and men's footwear designed for year-round, summer and winter wear. The company, which was established in 1991 and is completely equipped for footwear production, including administrative and communal aspects, has an excellent reputation on the footwear market in the Czech Republic. FARE is looking for cooperation with U.S. partners.

FARE Footwear Production
 Brumovská 1031
 766 01 Valasske Klobouky
 phone: (+420-577)320-640)
 fax: (+420-577)320-640)
info@fare.cz
www.fare.cz
 Mr. Alois Sustek, Director

Stun guns

Stun gun manufacturer introduces SCORPION 200, a combined gas and electric stun gun. This device is an absolute novelty on the world market. Upon adding the defensive gas spray, the gun has an increased defense radius of up to 6 ft (2m). The stun gun and defensive gas spray are integrated into one device that can be easily operated by one hand only. This eliminates the complicated manipulation usually needed when using an independent electric stun gun and an individual gas spray.

EXIM Consulting
 Prokopa Velikeho 572
 344 01 DOMAZLICE
 phone/Fax: +420-379 778 256
exim@telecom.cz
www.direkta.cz/firmy/exim
 Mr. Vestislav Krenek

Vital Wheat gluten

Krnovska Skrobarna
 Csl. Armady 921/60
 794 01 Krnov,
 Tel. 420-652.717.709, fax 420-652.711438
 Mr. Ales Marecek, Sales Manager

Pet products

This manufacturer of pet products plans to expand its business activities into the U.S. market and wants to open an office & storage space in the U.S.
 GRAVITAM, spol. s r. o.
 Jana Sigmunda 79
 783 49 Lutin
 phone: (+420-68)565-2751
 fax: (+420-68)565-2752
gravitam@mbox.vol.cz
 Ms. Kamila Simeckova

Spirits (vodka, gin, liquors)

Hobé/Kord, a traditional Czech manufacturer of liquors and spirits, began business in 1867. Hobé recently introduced a special new liquor called "Triumf," which is made from 32 different herbs. The recipe was made in cooperation with an old formula given by votaries from one of the old Czech castles.

Hobé also exports "Zubrovka" Vodka, "Kord" Gin, "Morella" Cherry/Apricot, Curacao, and offers miniatures that are very popular in hotels, pubs, bars, and on planes. Hobé wants to enter the U.S. market and is looking for cooperation with U.S. importers of liqueurs and spirits.

HOBÉ Group, a. s.
 Palackeho 248
 530 39 Pardubice
 phone: (+420-40)651-1021
 fax: (+420-40)651-1747
hobe@pce.cz

SERVICES FOR US COMPANIES OR JOINT ACTIVITIES IN THE CZECH REPUBLIC

tourism / electricity trading / manufacturing facilities / consulting

CARGO PARTNER

Cargo Partner, a major logistic and transportation forwarder in Central and Eastern Europe, is looking for Czech nationals to work in their New York branch. Candidates should have related business experience in the shipping area.
 phone: (718)632-7500
robert.galbavy@cargo-partner.com
www.cargo-partner.com
 Mr. Fergal Keenan, Vice President
 or Mr. Robert Galbavy

Restoration of Antiques

Czech restorer and exporter of antique country pine furniture - originals, reproductions, custom made furniture, un/waxed painted - is looking for new customers in the U.S., including wholesalers and dealers.

J & R PESTA Manufacture
 Kamenný Most
 phone: (+420-314)563-320
 fax: (+420-314)563-658
mobelpesta@mbox.vol.cz
www.manufacturepesta.cz
 Mr. Ivan Marek, Sales Director.

Artistic decorations and design

ARVA studio focuses on the artistic decoration and design of interiors, interior

textiles, architecture-building projects and engineering.
 AVRA, architectonic studio
 Divinska 2830/11
 150 00 Praha 5
 phone: 420/2/51 55 62 37
 cell: 0602 24 00 59
 Mr. Josef Vrana
 Ms. Jaroslava Holasová
 phone: 420/2/33 37 54 71
holasovaj@seznam.cz

Vetos s.r.o.

The Vetus Company is offering a joint venture for electricity trading in the Czech Republic; Vetus has full knowledge of this market, includes great possibilities and connections.

B.Nemcove 868
 399 01 Milevsko
 Tel./Fax: +420 368 521396
vetus@mymail.cz
 Mr. Vaclav Malek

CK AHOJ

Czech travel agency looking for American travel agencies interested in cooperation for incoming package tours to the Czech Republic.

Prumyslova ctvrt 154
 674 01 Trebic
 Tel.: +420 602 772 004

Fax: +420 618 833 334
ahoj@trado.cz
 Mr. Radim Schell

PALFRIG Ostrava

Czech company engaged in the sale, assembly, and service of cooling and air-conditioning equipment is offering:

1. Rental of the freezing/cooling premises located on the main road between the City of Ostrava and the Ostrava Airport, can be used as a FREE ZONE
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3. Services in the field of assembly and maintenance of cooling, freezing and air-conditioning equipment.

739 23 Stara Ves nad Ondrejnicu 607
 Tel.: +420 658 669 231
 Fax: +420 658 669 238
palfri@myboz.cz
www.palfrig.zde.cz
 Ms. Radka Kollarova

EasyLink Business Services

Market research & consulting company assisting foreign companies who seek export/import/investment opportunities and/or business partners in the Czech Republic and Slovakia. Services include market sector analyses, identification of

partners, arrangement of meeting itineraries, and other marketing services.

Na Berance 2
160 00 Praha 6
Tel: +420-2 2281-2281
Fax: +420-2 2281-2282
office@easylink.cz
www.easylink.cz
Mr. Filip Korinek

Spolecnosti Online s.r.o.

Czech professional firm offering a large range of services related to the incorporation of Czech companies, sale of ready-made (already incorporated)

companies, provision of registered office, bookkeeping and tax consulting.
U Habrovky 247/11
Prague 4, 140 00
Tel.: +420 226 091 136
Fax: +420 226 091 125
companiesonline@businessnet.cz
www.businessnet.cz
www.spolecnostonline.cz
Mr. Tomas Chrobak, Director

injection moulding production (including technology), possibility to settle different types of production.
Baarova 45
140 00 Praha 4
Phone: +420-2-41485137
Fax: +420-2-41485139
vacek@crayomine.cz
Mr. Petr Vacek

TRADESHOWS AND EXHIBITIONS / FALL 2002

Brno Exhibition Center

October 7 - 11

INVEK 2002 - International Information and Communication Technology Fair

October 22 - 25

PYROS - International Fire Fighting Equipment Fair

INTERPROTEC / 6th International Protective Equipment Fair

ISET / 2nd International Exhibit of Security Technology

NEW SIMET / 11th International Workshop Fair

WELDING / 16th International Welding Engineering Fair

FOND-EX / 9th International Foundry Fair

TEX-TEC / International Fair of Textile Technology

WOOD-TEC / 8th International Fair of Machinery, Equipment and Materials for Wood Industry

November 5 - 8

MEFA 2002 - International Fair of Medical Technology and Pharmacy
REHAPROTEX 2002 - International Tradeshow of Rehabilitation, Prosthetics and Health

November 14 - 17

SPORT Life - 1st International Sports Fair

Prague Exhibition Grounds

October 15 - 17

CHEM TEC 2002 - 9th International Chemical and Plastic Fair

October 24 - 27

Autoshow Praha 2002 - 8th International Automobile Exhibition

November 7 - 9

PRAGODENT - International Dental Equipment and Services Tradeshow

CZECH COMMERCIAL OFFICES IN THE UNITED STATES

For information on Czech products, companies, and/or investment opportunities in the Czech Republic, please contact:

Czech Embassy in Washington, D.C.: Alabama, Arkansas, Florida, Georgia, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maryland, Michigan, Minnesota, Mississippi, Missouri, Nebraska, North Carolina, North Dakota, Ohio, Oklahoma, South Carolina, South Dakota, Texas, Tennessee, Virginia, West Virginia, Wisconsin (Midwest, South, and eastern part of the West)

Contact: Ms. Veronika Lukasova, Phone: 202.274.9104

Fax: 202.244.2147, eco_washington@embassy.mzv.cz

Consulate General in Los Angeles: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming (western portion of the West).

Contact: Mr. Michal Korycanek, Phone: 310.473.0889 x.229

Fax: 310.473.9813, losangeles@embassy.mzv.cz

Consulate General in New York: Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont (Northeast).

Contact: Mr. Josef Dvoracek, Phone: 212.717.5643

Fax: 212.717.5064, consulate.newyork@embassy.mzv.cz

CzechTrade - Chicago Office

Contact: Ms. Jana Sevcikova, Phone: 312.644.1790,
Fax: 312.527.5544, sevcikova@czechtrade.cz

CzechTrade - Miami Office

Contact: Mr. Roman Matyas, Phone: 305.261.6313,
Fax: 305.261.6314, matyas@czechtrade.cz

Czech Center New York

Contact: Mr. Jan Zahour, Phone: 212.288.0830 x.106, Fax: 212.288.0971,
zahour@czechcenter.com

CzechInvest - U.S. Operations East

Contact: Ms. Hana Lasslerova, Phone: 312.245.0180,
Fax: 312.245.0183, lasslerova@czechinvest.org

CzechInvest - U.S. Operations West

Contact: Mr. Radomil Novak, Phone: 408.376.4555,
Fax: 408.376.4557, california@czechinvest.org

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