SHRIMPS MARKET
IN THE CZECH REPUBLIC

Office of Commercial Affairs, Royal Thai Embassy
Prague, Czech Republic
February 2015
SHRIMPS MARKET IN THE CZECH REPUBLIC

INTRODUCTION - SUBJECT OF THE MARKET STUDY

This market study is focused on shrimps market in the Czech Republic. In the analysis are used mostly import statistics - in particular under HS codes HS 030617 – frozen shrimps, HS 030627 – fresh, chilled or dried shrimps and HS 160529 – preserved /processed shrimps.

Furthermore, data from the Czech Statistical Office, Ministry of Industry and Trade, Ministry of Finance, researches conducted by specialized agencies and data from own research.

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SHRIMPS MARKET IN THE CZECH REPUBLIC

I SITUATION ON THE LOCAL MARKET

I.I CZECH MARKET OF FISH AND SEAFOOD AND CONSUMER BEHAVIOUR

The Czech Republic is a landlocked country and is able to produce freshwater fish only. Entire market demand for sea fish and seafood (including shrimps) has to be covered by imports.

The total market demand for shrimps (frozen, chilled, fresh, preserved) in the year 2013 reached 1,1 mil. kilograms per year, in terms of value 6,5 mil. USD.

Some 20 years ago, shrimps were almost unknown product on the Czech market. It has been introduced after the country had opened (in 1990). Even nowadays, many Czech consumers have lack of knowledge about seafood and do not know how to prepare it. Big differences between capital Prague and rest of the country exist. Also, shrimps are considered as luxury product with high price.

To compare with, total market demand for sea fish (frozen, chilled, fresh) is 37 million kilograms per year. Market demand for canned fish makes 20 million kilograms yearly. Market demand for shrimps (chilled, frozen, preserved) makes 1,1 million kg yearly.

The table below gives idea of ranking of fish and fish products in consumption of Czech population.

| CONSUMPTION OF FOODSTUFFS PER CAPITA IN THE CZECH REPUBLIC (unit: kg) |
|-----------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Pork                        | 46,2 | 40,9 | 41,5 | 40,9 | 41,6 | 42,1 | 41,3 | 40,3 |
| Beef                        | 18,5 | 12,3 | 9,9  | 9,4  | 9,4  | 9,1  | 8,1  | 7,5  |
| Poultry                     | 13,6 | 22,3 | 26,1 | 24,8 | 24,5 | 24,5 | 25,2 | 24,3 |
| Meat TOTAL                  | 82,0 | 79,4 | 81,4 | 78,8 | 79,1 | 78,6 | 77,4 | 74,8 |
| Fish and fish products incl. seafood | 4,9  | 5,4  | 5,8  | 6,2  | 5,6  | 5,4  | 5,7  | 5,3  |

Source: Czech Statistical Office, 2015

Consumption of fish in the Czech Republic has been growing and in the year 2013 reached **5,3 kg per capita**. Share of Czech fresh water fish (mainly carp) in this total
figure is 1.37 kg per year. Especially in connection with the healthy way of living, consumers preferences for fish grow but mainly in city areas. Especially, as fish are getting more popular among young generation, we can expect growth of consumption in the future. Comparing with the consumption of fish in other countries of EU, it is still very low in the Czech Republic. Average consumption of fish in EU (according to Czech Ministry of Agriculture) is 17 kg per capita.

Concerning retail sale of seafish and seafood in the Czech Republic, it is mostly sold in frozen condition. Few years ago new trend appeared and big supermarkets and hypermarkets in large cities started to offer chilled fish and seafood – however the selection is rather limited. Number of shops specialized for fish and seafood is very limited and such shops exist in large cities only. The largest specialist for fresh fish is MAKRO (wholesale chainstore selling foodstuffs).

I.II TARGET CONSUMERS

As for the target groups for shrimps in the Czech Republic, two categories can be identified:

1. catering sector (hotels, restaurants, catering companies)

2. households

According to estimate of big importers, 80% of total quantity of imported shrimps goes to catering sector (food service) and remaining 20% is sold in retail.
II. IMPORT STATISTICS

In total volume of imports of shrimps (in terms of quantity) to the Czech Republic in the year 2013, 90 % make frozen, chilled or fresh shrimps, while share of preserved shrimps is remaining 10 %. As for frozen shrimps, the growth of 20.4 % was achieved during the period January – November of the year 2014. In the year 2013, the growth rate reached 7.5 %.

OVERVIEW OF IMPORTS OF FROZEN SHRIMPS AND PRAWNS (other than cold water)
HS 0306 17 TO THE CZECH REPUBLIC

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>IMPORT VALUE (thous.USD)</th>
<th>MARKET SHARE (%)</th>
<th>GROWTH (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>2 900</td>
<td>1 827</td>
<td>2 056</td>
</tr>
<tr>
<td>Germany</td>
<td>831</td>
<td>1 074</td>
<td>1 213</td>
</tr>
<tr>
<td>Denmark</td>
<td>178</td>
<td>314</td>
<td>328</td>
</tr>
<tr>
<td>India</td>
<td>177</td>
<td>23</td>
<td>34</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>166</td>
<td>251</td>
<td>272</td>
</tr>
<tr>
<td>France</td>
<td>106</td>
<td>65</td>
<td>74</td>
</tr>
<tr>
<td>Belgium</td>
<td>93</td>
<td>171</td>
<td>191</td>
</tr>
<tr>
<td>Thailand</td>
<td>32</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Other countries</td>
<td>205</td>
<td>141</td>
<td>158</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4 688</td>
<td>3 895</td>
<td>4 355</td>
</tr>
</tbody>
</table>

Source: Czech Statistical Office, February 2015

Vietnam gradually became key supplier of frozen shrimps to the Czech Republic. Market share of Vietnam has been growing, in the year 2014 increased up to 62 %, strong position on the Czech market also keeps Germany, market share in 2014 reaching 18 %. In the long run, market share of Vietnam has been going up, while market share of traditional suppliers is doing down. Among traditional European suppliers are, apart from Germany, also Denmark, Belgium and France. Reason for growth of imports from Vietnam is low price.

In the years 2013 and 2014, market share of Thailand was below 1 %. Imports from Thailand has been decreasing since 2008. According to our opinion, Vietnam took part of market share of Thailand. Shrimps from Vietnam find good sales on Czech market especially due to very low price (in the Vietnamese market, similar price as chicken breast) and numerous Vietnamese community in the Czech Republic, that has experience with distribution especially to the sector of restaurants.
In past years, new trend in import of frozen shrimps appeared – growing importance of Asian suppliers, such as Vietnam, Bangladesh, India. Imports from these countries also help to reduce final prices of shrimps on the Czech market.

**OVERVIEW OF IMPORTS OF FRESH/CHILLED/IN BRINE SHRIMPS HS 0306 27 TO THE CZECH REPUBLIC**

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>IMPORT VALUE (thous.USD)</th>
<th>MARKET SHARE (%)</th>
<th>GROWTH (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>243</td>
<td>257</td>
<td>289</td>
</tr>
<tr>
<td>Germany</td>
<td>274</td>
<td>216</td>
<td>221</td>
</tr>
<tr>
<td>Netherlands</td>
<td>140</td>
<td>106</td>
<td>112</td>
</tr>
<tr>
<td>Poland</td>
<td>97</td>
<td>77</td>
<td>77</td>
</tr>
<tr>
<td>Indonesia</td>
<td>64</td>
<td>42</td>
<td>44</td>
</tr>
<tr>
<td>Singapore</td>
<td>34</td>
<td>36</td>
<td>38</td>
</tr>
<tr>
<td>Thailand</td>
<td>14</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Other countries</td>
<td>112</td>
<td>111</td>
<td>121</td>
</tr>
<tr>
<td>TOTAL</td>
<td>978</td>
<td>853</td>
<td>911</td>
</tr>
</tbody>
</table>

*Source: Czech Statistical Office, February 2015*

Major suppliers of chilled shrimps are countries that are nearest to CZ from geographical point of view (distance). Leading role play France – market share of 25 % in 2014, Germany (28 %) and the Netherlands (14,3 %).
OVERVIEW OF IMPORTS OF PRESERVED/PROCESSED SHRIMPS
incl. frozen (HS 1605 29) TO THE CZECH REPUBLIC

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>IMPORT VALUE (thous.USD)</th>
<th>MARKET SHARE (%)</th>
<th>GROWTH (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bangladesh</td>
<td>308</td>
<td>297</td>
<td>342</td>
</tr>
<tr>
<td>U.K.</td>
<td>176</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Vietnam</td>
<td>133</td>
<td>123</td>
<td>123</td>
</tr>
<tr>
<td>Equador</td>
<td>95</td>
<td>65</td>
<td>72</td>
</tr>
<tr>
<td>China</td>
<td>77</td>
<td>43</td>
<td>43</td>
</tr>
<tr>
<td>Thailand</td>
<td>51</td>
<td>322</td>
<td>322</td>
</tr>
<tr>
<td>Italy</td>
<td>44</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>Poland</td>
<td>43</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>Other countries</td>
<td>114</td>
<td>228</td>
<td>237</td>
</tr>
<tr>
<td>TOTAL</td>
<td>1 041</td>
<td>1 156</td>
<td>1 221</td>
</tr>
</tbody>
</table>

Source: Czech Statistical Office, February 2015

Market leader in preserved/processed shrimps in the year 2014 was Bangladesh with the market share of 29,6 %, followed by U.K. (market share of 16,9 %) and Vietnam (market share of 12,8 %).

Similarly as in frozen shrimps, we can observe the trend of growing importance of Asian exporters, such as Bangladesh, China, Vietnam.
III. CUSTOMS TARIFFS

CUSTOMS TARIFFS

<table>
<thead>
<tr>
<th>HS Code</th>
<th>ITEM</th>
<th>IMPORT DUTY</th>
</tr>
</thead>
<tbody>
<tr>
<td>0306 17</td>
<td>Frozen shrimps (with the exception of HS 0306 13 30 shrimps of the genus Crangon where the customs duty makes 18%)</td>
<td>20,0 %</td>
</tr>
<tr>
<td>0306 27</td>
<td>Fresh, chilled or dried shrimps</td>
<td>12,0 %</td>
</tr>
<tr>
<td></td>
<td>Import under quota</td>
<td>0 %</td>
</tr>
<tr>
<td>1605 29</td>
<td>Preserved shrimps</td>
<td>20,0 %</td>
</tr>
</tbody>
</table>

Source: EU TARIC, 2015

From 1st May 2004, the Czech Republic became an EU member and since than EU customs legislation applies on all imports.

Details of customs duties and possible restrictions can be viewed on internet website of EU dealing with customs tariffs:
http://ec.europa.eu./taxation_customs/dds2/taric/taric_consultation.jsp

Every consignment of shrimps imported to CZ must be accompanied by HEALTH CERTIFICATE certified by Thai authorities and is subject to veterinary inspection.

Import of products of animal origin is in the Czech Republic under supervision of State Veterinary Administration of the Czech Republic. Information about import conditions, health certificate and information up-date in English can be found on the internet website www.svscr.cz

Czech Veterinary Administration requires the bi-lingual form (combined Czech and English version) – it can be viewed on the internet websites www.svscr.cz - under section of Trade with Veterinary Commodities - Veterinary certificates for imports from third countries – Fishery & Aquaculture Products for Human Consumption.

The direct link to the form of Veterinary Certificate applicable for shrimps is as follows:
IV. MARKETING INFORMATION

IV.I IMPORTERS AND DISTRIBUTION CHANNELS

Concerning shrimps, seafood and seafish, major importers have their own distribution network and cover the whole territory of the Czech Republic.

Leading company in fish and seafood incl. shrimps is BIDVEST Co. BIDVEST is the largest wholesaler in the Czech Republic covering frozen, chilled and fresh foodstuffs and also non-food items. Former name of BIDVEST was NOWACO. BIDVEST still uses the NOWACO brand. BIDVEST-Nowaco is the biggest supplier of fish and seafood to retail (supplies 12 thousand retail shops covering all major hypermarkets and supermarkets) and also biggest supplier in food service – 20 thousand customers (deliveries for hotels, restaurants and catering companies). The turnover of BIDVEST Co. makes 7,3 bil. CZK. Number of employees of BIDVEST is 1,000 and the company in CZ exists since 1992 (originally as NOWACO Co.). In the year 2005, NOWACO Central Europe (covering Czech, Slovak and Hungary) was acquired by private capital investment funds (J.P.MORGAN PARTNERS and BANCROFT PRIVATE EQUITY) for EUR 90 millions, since the year 2009 NOWACO is owned by multinational company BIDVEST. Apart from fish and seafood, BIDVEST offers whole range of fresh, chilled and frozen food products (such as frozen ready made food, frozen fruits and vegetables, frozen potato products, salats, ice-cream, canned fish, meat, potatoe products etc.). Since the changes in ownership structure, NOWACO started to concentrate also on supplies of fresh meat and meat products and pays more attention to food service business. Details can be viewed at www.nowaco.cz or www.bidvest.cz . Under BIDVEST Group belongs also GASTROSTELLA Cash and Carry Wholesale (www.gastrostella.cz).

Second biggest importer of shrimps is CIPA Co. (www.cipa-gastro.cz). CIPA has Italian owner and was established in the year 1992. Its primary focus is on hotels, restaurants, catering companies. Currently CIPA has more than 4 thous. clients. In the year 1992 the company started with imports of fish and seafood, gradually added other items (frozen fruits and vegetables, potato products, desserts, meat etc.). CIPA also operates CASH and CARRY wholesale in Prague 5. Fish products are also supplied to hypermarket chains (TESCO, MAKRO, KAUFLAND) – chainstores make 10 % of turnover of CIPA-GASTRO. CIPA-GASTRO operates a fleet of 25 company vehicles and arrange deliveries 7 days a week for their customers.

POLAR Co. (www.polar-transport.cz) POLAR Co. was established in the year 1991 and started with the distribution of frozen food locally. In the year 1994 the cold storage
was built. POLAR Co. gradually grew up and developed into second biggest market player in distribution and wholesale of frozen foodstuffs (fish, seafood, fruits and vegetables, meat, ice-creams etc.). Number one on the Czech market is NOWACO Co. Comparing to BIDVEST - NOWACO, POLAR is the biggest company in the field owned by Czech person. POLAR Co. also has advantage of being independent (own premises, own cold storage, 1 owner only). Current number of employees is 60 and turnover is 300 mil. CZK per year. Core business of POLAR consists of:

- trade, i.e. import, storage and distribution of frozen foodstuffs over the whole territory of the Czech Republic.
- supplying frozen foodstuffs to 40 regional wholesalers
- packaging/repackaging of frozen fish
- logistics, cold storage and related services for independent traders (e.g. for CIPA Co.)
- storage of frozen foodstuffs for the Czech Government (food security stocks)
- providing of food service for restaurants, schools etc. (not only frozen goods, but also chilled and dry food)

KIMBEX Co. ([www.kimbex.cz](http://www.kimbex.cz)) is Czech company located in Ostrava. It was established in 1991 and imports fish, seafood and fish raw material. KIMBEX is dealing in frozen products only. About 40% of imported shrimps goes to catering sector, rest to retail. Main customers of KIMBEX Co. are retail chains, wholesalers, catering companies. Number of employees of KIMBEX is 36, yearly turnover reaches 250 mil. CZK.

ASPIUS ([www.aspius.cz](http://www.aspius.cz), e-mail:klimova@aspius.cz) was established in the year 2002 and is a 100% Czech owned. Major business is wholesale with frozen and chilled meat, fish, crustaceas and mollucs.

Among other smaller importers/wholesalers are:

CATCHME
([www.catchme.cz](http://www.catchme.cz))

CERSTVE RYBY
([www.cerstveryby.cz](http://www.cerstveryby.cz))

CZECHFROST Co.
([www.czechfrost.cz](http://www.czechfrost.cz))
IV.II  MARKETS SNAPSHOTS
V. OPPORTUNITIES FOR THAILAND

The Czech Republic is a landlocked country and is able to produce freshwater fish only. Entire market demand for sea fish and seafood (including shrimps) has to be covered by imports.

It is necessary to realize, that shrimp market in the Czech Republic has position of marginal market (limited in size). Total value of shrimps imports (fresh, frozen, chilled, preserved, canned) reached the total value of 6,5 mil. USD in the year 2013, in terms of quantity, it was 1,1 mil. kg. However, there is still potential for further growth in the future. Major limitations are: different eating habits (landlocked country, no tradition for seafood), high price, lack of consumers knowledge.

Shrimps imports to CZ started after the country opened (in 1990), among traditional suppliers were Denmark, France, Italy, Germany. During last few years, new trend in import of frozen shrimps appeared – growing importance of Asian suppliers (Vietnam, Bangladesh, Thailand).

In our opinion, crucial for Thai suppliers is to offer competitive price. Czech consumers in seafood segment have low knowledge and are mostly concerned about price. Also, as segment of shrimps is very narrow, we recommend to offer more varities of frozen products, and higher value added, such as ready made meals etc.

To penetrate Czech market, we consider it would be necessary to find strong Czech partner, that has good contacts (to both retails chains and catering) and good knowledge of market. Direct financial participation on sales promotion in hypermarket chains (educating the customers) would be also persuasive.

Due to strategic location of the Czech Republic and good infrastructure, to set up a distribution centre/hub in the Czech Republic, from which other Central European markets could be accessed and total volume of shrimps significantly increased, is also an alternative. Strong Czech partner would have to be involved in that case.
VI. TRADE FAIRS

SALIMA INTERNATIONAL FOOD FAIR

SALIMA is largest international food fair in the Central European Region (Czech Republic, Slovak Republic, Poland, Hungary, Slovenia, Austria). SALIMA fair covers the entire food industry and food processing chain and reflects the trends on the food market in Central Europe. SALIMA food fair is held once in two years in Feb-March in the city of Brno.

Date of event: 23rd – 26th February, 2016
Venue: Brno Exhibition Centre, Brno, Czech Republic

Organizer: BVV, a.s.
Výstaviště 1
647 00 BRNO
Fax: +420-5-4115 3070
E-mail: salima@bvv.cz
Internet websites: www.bvv.cz

Nomenclature:

1. Milk and milk products
2. Oils, fats, eggs and egg products
3. Spices, seasonings, salt, rice, pastas
4. Meat materials and additives/seasonings, admixtures, poultry, fish, meat products
5. Ready-made meals, soups, sauces, cold cuisine products, frozen dishes
6. Sugars and sweeteners, sweets and chocolate
7. Fruits and vegetables, well-balanced health foods, special foods, organic food
8. Alcoholic and soft drinks (except for wine, coffee and tea)
9. Coffee, tea, cocoa
10. Tobacco and tobacco products
11. Machines and technologies for the dairy industry
12. Machines and technologies for the meat industry
13. Machines and technologies for fruit and vegetable processing
14. Machines and technologies for production of pastas and sweets
15. Machines and technologies for the production of alcoholic and soft drinks
16. Machines, technologies and equipment for the food industry other
17. Packaging materials and packing technologies
18. Weighing, measuring and laboratory engineering
19. Cooling and freezing units
20. Hardware and software for the food industry
21. Biofuels, biolubricants
22. Financial and promotion services, authorities, literature
International Food Fair 2014 statistical data:

- **Total number of visitors**: 28,196 visitors from 39 countries
  - 171 accredited journalists
- **Number of exhibiting companies**: 874 from 26 countries
  - 1,314 Czech and foreign brands in representation
  - 49.1% of exhibiting companies came from abroad
- **Exhibition area (net)**: 18,534 sqm

Details in English can be found on internet website of fair organizer [www.bvv.cz/salima](http://www.bvv.cz/salima)
VII. LIST OF CZECH IMPORTERS AND WHOLESALERS

BIDVEST - NOWACO CZECH, s.r.o.
Ruzové udolí 553
278 01 Kralupy nad Vltavou
Tel: +420 – 315 706 111
Fax: +420 – 315 706 222
E-mail: bidvest@bidvest.cz, jan.tajovsky@bidvest.cz
WWW: http://www.nowaco.cz

C.I.P.A., s.r.o.
Horejsí nábřeží 389
150 00 Praha 5 - Smíchov
Tel: +420 – 257 316 601
Fax: +420 – 257 316 659
E-mail: cipa@cipa-gastro.cz
WWW: http://www.cipa-gastro.cz

EURO FRIGO Praha, spol. s r.o.
Ovci hájek 2355/68
158 00 Praha 5
Tel: +420 - 251 614 011
+420 - 251 614 009
Fax: +420 - 251 614 005
E-mail: sales@eurofrigo.cz
www.eurofrigo.cz
Contact person:
Dipl.Ing. Petr Kabelac

FJORD BOHEMIA spol. s r.o.
Za Avii 2
196 00 Praha 9
Tel: +420 – 245 001 216
E-mail: jana.jehlickova@fjordbohemia.cz
WWW: http://www.fjordbohemia.cz
Contact person:
Mr. Jana Jehlickova, Purchasing Manager

POLAR TRANSPORT
U Cihelny 1
281 63 Kostelec nad Černými Lesy
E-mail: vaclav.vlasak@polar-transport.cz
www.polar-transport.cz
Contact person: Mr. Vaclav Vlasak, the owner
KIMBEX, s.r.o.
Salounova 40
703 00 Ostrava - Vitkovice
Tel: +420 - 596 615 250-1
Fax: +420 - 596 639 370
E-mail: kim@kimbex.cz
WWW: http://www.kimbex.cz
Contact person:
Ing. Ivo Kubis

MAKRO Cash & Carry CR s.r.o.
Jeremiasova 7/1249
155 80 Praha 5
Tel: +420 - 251 111 111-3
Fax: +420 - 251 111 151-3
E-mail: info@makro.cz
WWW: http://www.makro.cz

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Čísovická silnice – obchodní zona
252 03 Ritka u Prahy
Tel: +420 311 360 096
e-mail: klimova@aspius.cz
www.aspius.cz

CATCHME
Capkova 1690
251 01 Ricany
Tel: +420 602 445 354
E-mail: info@catchme.cz
www.catchme.cz

CZECHFROST, s.r.o.
Dysina 408
330 02 Dysina
Tel/fax: + 420 377 882 772
E-mail: fojtach@czechfrost.cz
www.czechfrost.cz

DIANA FISH CO, LTD.
Trída 5. května 1082
289 11 Pečky
Tel: +420 321 715 404
Fax: +420 321 715 406
E-mail: info@diana-fish.com, mirka.sibravova@diana-fish.com
www.diana-fish.com
Pajero s. r. o
Za Školou 34/9
Děčín 22
405 02
Česká republika
Tel, Fax: +420 412 544 890
E-mail: info@pajero-food.cz
www.pajero-food.cz