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Austria

FOOD PROCESSING SECTOR

An Overview of the Austrian Food Processing Sector

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Report Highlights:

The Austrian food processing industry plays a major role in Austria's economy. The food processing industry serves a market of 8.2 million people and represents the fifth largest industrial sector within all of Austria's industrial processing output. The total turnover in 2008 was $11.1 billion compared to $7.2 billion in 1995. Imports by the food processing sector have been growing and reached $4.8.billion in 2007. In 2008, Austria's agriculture, fish and forestry imports worldwide amounted to $15.2 billion. Imports from the United States of America totaled $113 million in 2008, not including significant and steadily increasing transshipments from other EU countries. U.S. exporters will find export opportunities for dried fruits and nuts, rising demand for seafood, specialty meats, certain wellness and/or organic products, pet food and non-alcoholic beverages.

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SECTION I. MARKET SUMMARY

The Austrian food processing industry plays a major role in Austria's economy. The food processing industry serves a market of 8.2 million people and represents the fifth largest industrial sector within all of Austria's industrial processing output. The total turnover in 2008 was $11.1billion compared to $7.2billion in 1995.

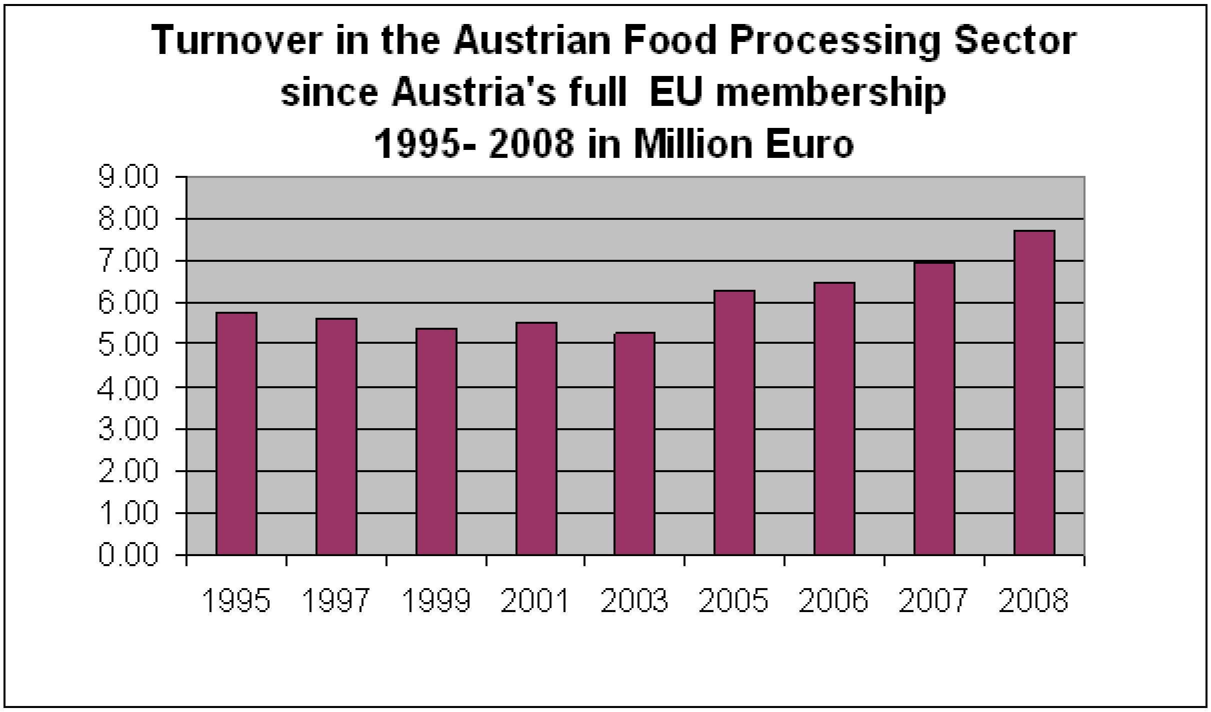
According to statistics published by the Lebensministerium, the most important sectors of the Austrian food processing industry measured by their output are the brewing sector 14%, confectionary industry 11.1%, non-alcoholic beverages 10%, and meat production 9.4%.

Although a small country, Austria has one of the highest standards of living in Europe and the affluent customers demand high quality products. U.S. exporters will find export opportunities for dried fruits and nuts, rising demand for seafood, specialty meats, certain wellness and/or organic products, pet food and non-alcoholic beverages.

The Austrian economy has consistently performed better than the EU average. Growth will be weaker in 2009, but is still expected to be close to economic potential. The country's heavy dependence on the automobile industry and its exposure to markets in Central and Eastern Europe are major risks. The government expects private consumption to grow by just 1.8% in 2009. The Eastern enlargement of the EU should boost growth rates over the next 10 years.

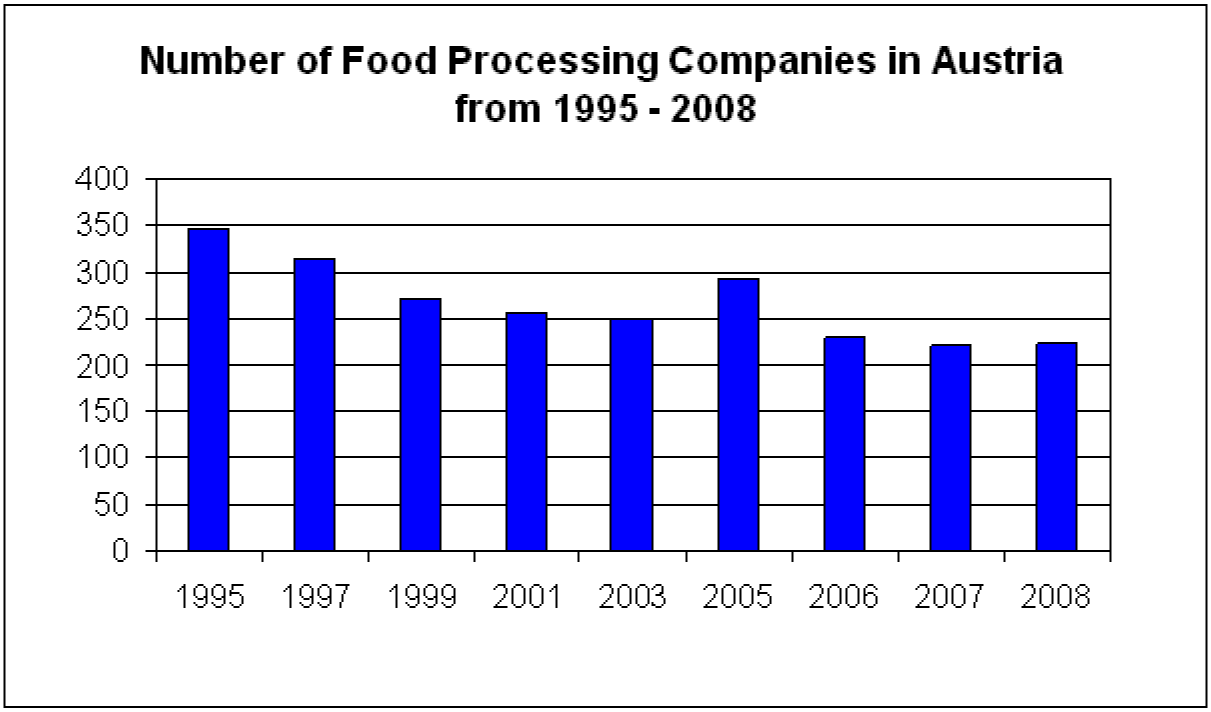
Imports by the food processing sector have been growing and reached $4.8.billion in 2007. In 2008, Austria's agriculture, fish and forestry imports worldwide amounted to $15.2 billion. Imports from the United States of America totaled $113 million in 2008, not including significant and steadily increasing transshipments from other EU countries.

In times of world wide weakening economies, a 0.74% increase of imports from the previous year shows again that Austria belongs to one of the richest countries in the EU. There will always be a reliable market for U.S. products.

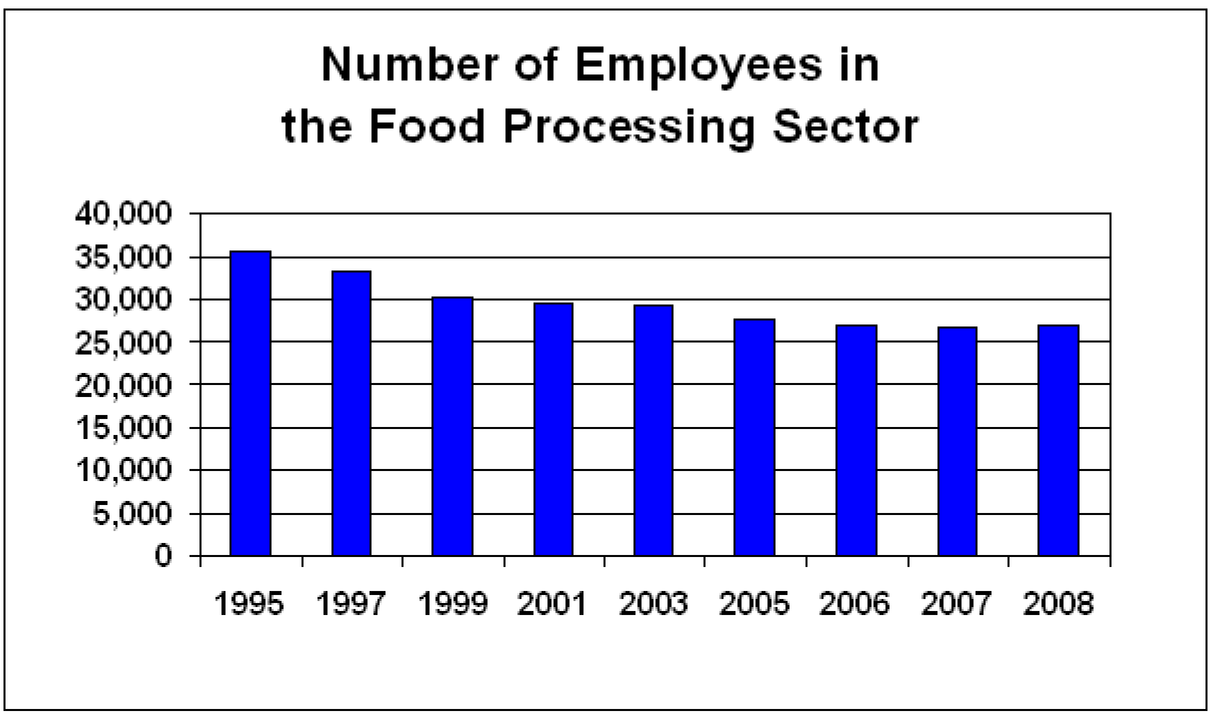


Source: Austrian Lebensministerium, Lebensmittelbericht 2008

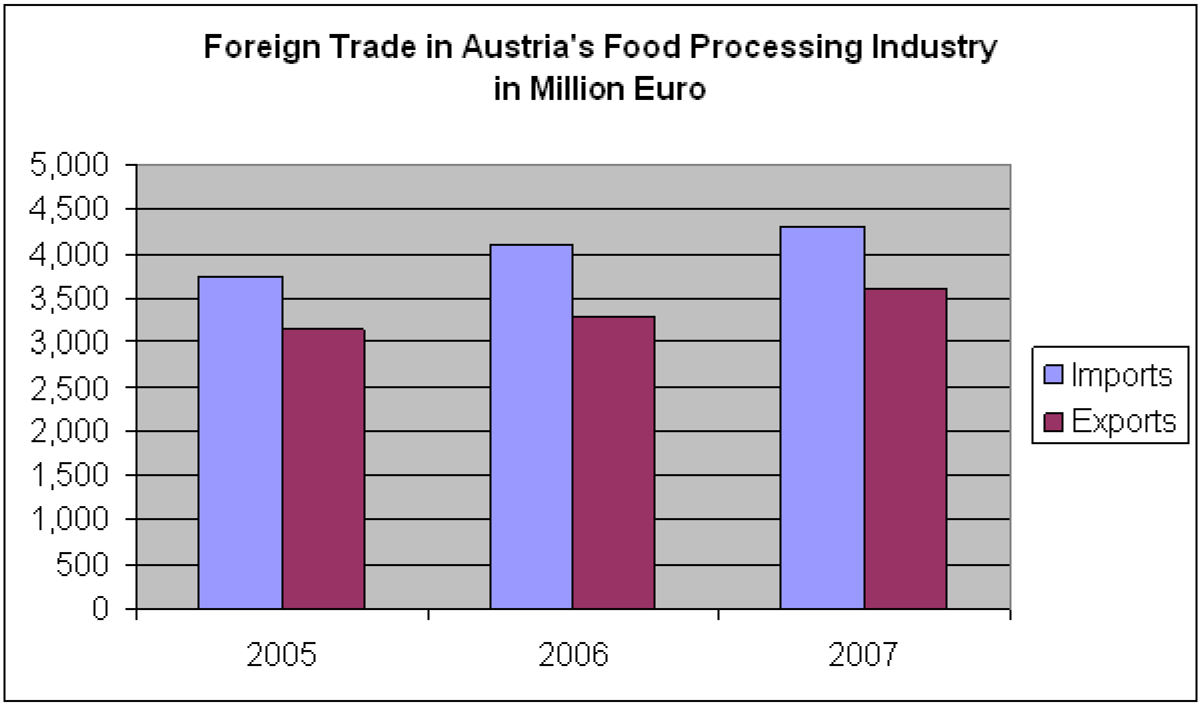
1995 was a very critical year for the Austrian food processing industry. Austria joined the EU as a full member and the entire food processing and drinks industry underwent a major restructuring and reconsolidation process. The number of food processing companies went from 346 in 1995 to 222 in 2008. The number of employees decreased from 35,000 in 1995 to 27,000 in 2008.



Source: Austrian Lebensministerium, Lebensmittelbericht 2008



Source: Austrian Lebensministerium, Lebensmittelbericht 2008



Source: Austrian Lebensministerium, Lebensmittelbericht 2008

In 2008 Austria's food processing industry exported €4.6 billion which represents a 5.5% increase over 2007 exports. In the context of the total agricultural production the exports by the food processing industry represent 56.6 % of the total.

In order to assist the industry during the reconstruction period the Austrian Ministry of Agriculture started in cooperation with the food processing industry and the retail sector various promotional initiatives. These initiatives emphasize the local origins and uniqueness of local ingredients used. Special labels and trademarks were created to enforce regionalism
and traceability of processed products.

ocessed Food and Drink Industry Data, Austria

Advantages	
A strategic location within the Central European Region, processed products can be re-exported to a approximately 50 million people in surrounding countries.	ood processing industry in Austria and surrounding Central Europe countries underwent a severe concentration process. Each country concentrates on specific segments and/or products for food processing. This globalization and market concentration represents a big challenge for U.S. exporters to find the appropriate European country who will need the raw material for the processing industry.
Austrians have one of the highest standard of living in the EU. Austrians	Organic products and health aspects are an important part of the daily diet. The food processing industry is reacting to this trend,

are affluent customers, used to high quality products and are environmental and health conscious in their food selection.	U.S. importer need to be aware of this situation. Importers need to invest market funds (advertising discounts etc) to be price competitive.
Good network of agents and importers and knowledge of consolidators helps to get product into the market.	The relative small country inhibits sometimes direct imports due to small quantities of product required. Many products are imported and processed through other EU importers and processers.
Growing tourisms industry within and outside of Austria stimulates the demand for U.S. products; e.g. U.S. beef, ethnic foods organic snacks.	EU labeling, traceability, and packaging laws inhibit the imports of some U.S. products, who have a high market potential e.g. U.S. beef and poultry. Organic products need proper labeling to enter EU countries.

I. ROAD MAP FOR MARKET ENTRY

TRATEGY

In general terms U.S. exporters already exporting to other EU members will likely be meeting most of the requirements for exporting to Austria.

In order to be successful on the Austrian food processing market and considering the relative small size and structure of the Austrian food processing industry an exporter should use the following steps for successful market entry:

- Conduct a thorough market research to assess market potential:

Tools: FAS Attaché reports (product and sector specific reports) e.g. Exporter Guide, Fairs Report. All reports can be found at

http://www.fas.usda.gov/scriptsw/attacherep/default.asp

or

http://gain.fas.usda.gov/Pages/Default.aspx

Contact FAS Vienna office to discuss method and market entry strategy
Contact State Regional Trade Groups and/ or U.S. Cooperators to obtain market access support. STRG's and/or Cooperator groups use trade shows, trade missions and tailor made market research to assist importers.

- Find an agent, importer wholesaler, distributor who can assist with information on import requirements, phytosanitary regulations, labeling requirements and competition

Tools: Foreign Agricultural Service in Vienna provides market knowledge and Foreign Buyer Lists.

- Ensure regular product supply

Tools: Given that sales to Austria might be in small volume request from FAS Washington consolidator address list to lower shipping costs.
Check the American Foods in Europe Directory (http:// www.american-foods.org) which lists all European

buyers of U.S. products.
Attend a trade show to test the product on the market.

Other helpful Attaché reports include the *EU Certification Guide*, which provides an overview of legally required health and origin certificates and the European Union Report which gives a complete overview of food laws currently in force in the European Union.

ection of FAS reports can be viewed online at:

http://www.fas.usda.gov/scriptsw/attacherep/attache_lout.asp

gricultural Service

The USDA Foreign Agricultural Service in Vienna can be contacted for assistance with questions regarding the Austrian market, trade shows and other marketing or sales opportunities in Austria. Contact information for FAS Vienna is found at the end of this report.

Trade Groups

The State Regional Trade Groups (SRTG) are regionally located in the U.S. and non-profit trade development organizations that help U.S. food producers and processors sell their products overseas. They are funded by USDA's Foreign Agricultural Service (FAS), the State Departments of Agriculture and private industry.

These groups carry out promotional activities that increase exports of U.S. high-value food and agricultural products. Activities include participation in international trade exhibitions, overseas trade missions, reverse trade missions, export education, in-country research, and point-of-sale promotions in foreign food chains and restaurants in markets around the world.

The SRTGs also administer a cost-share funding program called the Brand program, which supports the promotion of brand name food and agricultural products in overseas markets. For more information, contact the state regional trade group responsible for your state:

SA - Northeast Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont dexport.org oodexportusa.org	**d States Trade Association** Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas, Virginia, West Virginia usta.org usta.org
ssociation n USA Indiana, Illinois, Iowa, Kansas, Michigan,	**gricultural Trade Association** Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon,

Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin odexport.org oodexport.org	Utah, Washington, Wyoming wusata.org Web site: www.wusata.org

ı Trade Shows

Austria has only one major food trade show "Alles für den Gast". This show is held twice a year in Salzburg. In addition, all major Austrian traders, importers and food processers will attend the large product specific trade shows held in Germany and France.

Anuga in Germany alternating with SIAL in Paris are the most important food trade shows in Europe and the best place for U.S. exporters to make contact with potential business partners. New food trends and latest developments in the food industry can be observed at these shows. These shows are catered to an international crowd, giving exporters access to a wide selection of interested buyers from around the world.

Description	quency & Dates	Contact
al Sweets v) ıny The largest confectionery trade show worldwide catering to an international crowd. esent.	ace annually in January/February eb. 2010	tioners Association (NCA) - 5750 - 5752 e.com
ıny Takes place simultaneously with ISM (see above). Focusing on confectionery ingredients. present.	when the show Interpack is held. 2010	:. Chicago 920 063 enafta.com cologne.com
Europe's largest trade show for fresh produce, dried fruits and nuts catering to an international crowd. esent.	ıually in January	ıal - 9935 - 1411 a.com ıttp://www.b-for.com/fruitlogistica.html
many The world's largest trade show for organic products catering to an international crowd.	ıually in February.	ıal - 9935 - 1411 com/biofach.html

ɛsent.		
many The world's largest trade show for pet and pet food supplies catering to an international crowd. ɛsent.	ɛry two years in May.	ɜroup 714 .713 ɔm ɔogroup.com
ɪny The world's largest trade show (5.000+ exhibitors) for foods & beverages catering to an international crowd. ɛsent.	ɛry two years in October. 2009	ɛ. Chicago 920)063 enafta.com ı
Europe's second largest trade show (5.300+ exhibitors) for foods & beverages catering to an international crowd	ɛry two years in October. 2010	ent, Inc.)041 8426 *ɔm*

ɑll USDA sponsored trade show can be found under:

ɦttp://www.fas.usda.gov/agx/trade_events/trade_events.asp

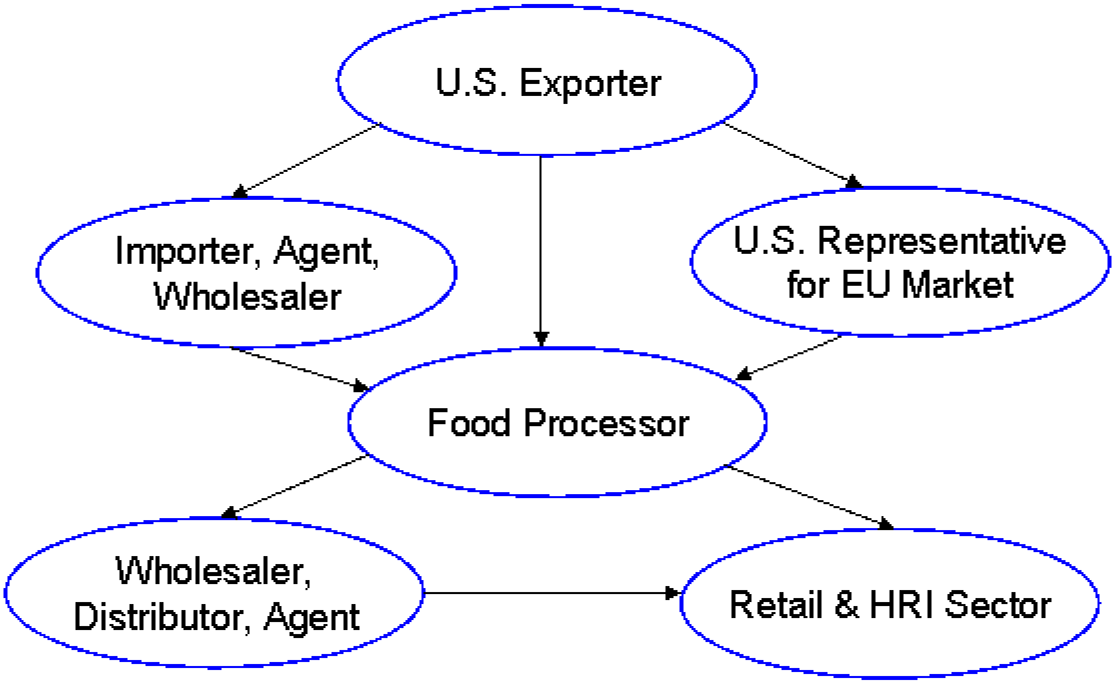
STRUCTURE

The Austrian food processing market is relatively small and food processors generally source their products through importers/traders or wholesalers from other EU importers. This is especially important for a U.S. exporter when looking at the Austrian food processing sector.

Large importers in either Germany or Holland work with Austrian agents or wholesalers to distribute the products to the different food processing facilities. U.S. exporter already exporting to other EU members will likely be meeting most of the requirements for exporting to Austria.

The structure and relative small size of the Austrian food processing sector requires only a small number of traders, importers or agents for sourcing products. Only large processors will buy directly from foreign suppliers.

Globalization and concentration in the European food processing sector and in particular in Austria has reduced the number of food processors. A typical Austrian food processor exports large amount of it's production to other EU countries. This constitutes an excellent opportunity for U.S. food exporters supplying it's product to an Austrian food processor. For example supplying bulk product to a large snack food processor n Austria means these products will end up on the shelves in many European retail stores.



C. COMPANY PROFILES

The following table includes a selection of food processors in Austria, sorted by names and the type of products processed.

Product Types	Company	2007 Sales - Million €	End-user Channels	Production Location	Procurement Channels
Meat	**Radatz** http:// *www.radatz.at/*	120	WholesalerRetailers HRI	Vienna	Local Products, Imports
	Handl http:// www.handltyrol.at/	78	WholesalerRetailers HRI	Tyrol	Local Products, Imports
	Wiesbauer http:// *www.wiesbauer-exquisit.at*	70	WholesalerRetailers HRI	Vienna	Local Products, Imports
	Aibler Fleisch &Wurstwaren http:// www.aibler-delikatessen.at	50	WholesalerRetailers HRI	Oberwal-tersdorf	Local Products, Imports
	Landena KG Landegenossen Schaft http://	65	WholesalerRetailers HRI	Stainach	Local Products

	www.landena.at				
	Schirnhofer GesmbH http:// *www.feinkost-schirnhofer.at/*	50	WholesalerRetailers HRI	Styria	Local Products, Imports
Poultry Meats	**Wech Gefluegel GmbH** http:// www.wech.at	50.5	Wholesaler Retailers HRI	Kollegg	Local Products
	Huber's Landhendl http:// www.hubers landhendl.at	106	WholesalerRetailers HRI	Pfaff-staetten	Local Products,
Dairy	**Berglandmilch reg** http:// www:bergland milch.at	490	WholesalerRetailers HRI	Pasching	Local Products
	Tyrol Milch http:// *www.tirolmilch.at*	149	WholesalerRetailers HRI	Innsbruck	Local Products
	Gebrueder Woerle http:// www.woerle.at	85.6	WholesalerRetailers HRI	Henndorf am Wallersee	Local Products
	Nieder-oesterreichische Milkholding http:// www.noem.at	335	WholesalerRetailers HRI	Baden	Local Products
Fish & Seafood	**Holzinger Fischerarbeitung** http:// www.holzingerfisch.at/	3	WholesalerEnd-users	Upper Austria	Local fish breeders
	Eisvogel Hubert Bernegger GesmbH http:// www.eisvogel.eu	17	Spar, End- user, Wholesaler	Upper Austria	Own production of fresh water Fish; Imports
	C & N (part of Vivatis group: www.vivatis.at) http:// www.c-n-fish.at	Not available	WholesalerEnd-users	Vienna	Local suppliers, Imports
Non Alcoholic Beverages	**Pfanner Hermann Getraenke, Gesmbh** http:// www.pfanner.com	228	WholesalerRetailers HRI	Vorarlberg Other countries	Local suppliers, Imports
	Rauch *www.rauch.cc*	691	Major Retailstore, Wholesaler	Vorarlberg other EU countries	Local suppliers, Imports
	S. Spitz GesmbH http:// www.spitz.at	215	Major Retailstore, Wholesaler	Linz	Local suppliers, Imports
	Ybbstaler Fruchtsaefte GesmbH http:// www. *ybbstaler.at/*	100	WholesalerRetailers HRI	Lower Austria	Local suppliers, Imports
Alcoholic	**Brau Union Oesterreich**	590	WholesalerRetailers	Linz	Local

Beverages	http:// www.brauunion.at		HRI		suppliers, Imports
Baked Goods	**Oelz Rudolf Meisterbaecker** http:// www.oelz.at	133	WholesalerRetailers HRI	Dornbirn	Local suppliers
	Ankerbrot AG http:// www.anker-brot.at	85	WholesalerRetailers HRI	Vienna	Local suppliers
Prepared Fruit, Vegetable Oilseed Products	**Url F & Co** http:// www.f-url.at/	63	WholesalerRetailers HRI	Unterprem-stätten	Local suppliers
Confec-tionary Products	**Kraft Foods Oesterreich** http:// www.kraftfoods.at	400	WholesalerRetailers HRI	Bludenz	Local suppliers, Imports
	Manner Josef GesmbH http:// www.manner.at	137	WholesalerRetailers HRI	Vienna	Local suppliers, Imports
	Mars Austria (former Masterfoods) http:// www.mars.at	51	WholesalerRetailers HRI	Lower Austria	Local suppliers, Imports
Snack Foods	**Kelly GesmbH** http:// www.kelly.at	106	WholesalerRetailers HRI	Vienna	Local suppliers, Imports
Pet Foods	**Mars Austria (former Masterfoods**) http:// www.mars.at/	103	WholesalerRetailers HRI	Lower Austria	Local suppliers, Imports
Prepared Meals (Mixed ingrediens	**Esca Food Solutions GesmbH** http:// www.osigroup.com	53	Major customer Mc Donalds Austria	Enns	Local Suppliers
Dried Goods & Condiments, Spices	**Almi GesmbH** http:// *www.almi.at*	60	WholesalerRetailers HRI	Upper Austria	Local suppliers, Imports
	Adolf Darbo http:// www.darbo.at	87.4 – (2006)	WholesalerRetailers HRI	Tyrol	Local suppliers, Imports
	Johann Kotanyi GesmbH http:// www.kotanyi.com	90.0 (2006)	WholesalerRetailers HRI		Local suppliers, Imports
Dried Fruit & Nuts	**Farmgold** http:// www.farmgold.at	14	WholesalerRetailers HRI	Lower Austria	Local suppliers, Imports
	VOG http:// www.vog.at/unternehmen_engl.htm	121	WholesalerRetailers HRI	Linz	Local suppliers, Imports Direct
Mixed	**Vivatis Austria**	763	WholesalerRetailers	Vienna	Local

Products Group	Processing/trading company covering many different food products: http:// www.vivatis.at		HRI		suppliers, Imports Direct
Specialized Food Ingredients	**Wiberg** Http:// www. http:// www.wiberg.ca/	65	WholesalerRetailers HRI	Salzburg	Local suppliers, Imports Direct

D. SECTOR TRENDS

Red Meat and Poultry

Austria is a large net exporter of beef and has sufficient pork production. Some imports occur mainly from Germany, the Netherlands and Italy. Total meat processing output for 2007 was 947,717MT of which 298.082MT were imports and 409,84MT exports.

There is a rising demand for poultry meat especially turkey . Total poultry imports in 2007 were 94,340MT. Half of this was turkey meat. U.S. turkey exports would be competitive to meet Austria's rising turkey demand if the EU approved U.S. poultry slaughter plants.

Austrian's per capita red meat consumption was 100.2kg/person. It is decreasing every year by about 3%, with 20% of woman already not eating meat. Austrians are very sensitive about origin of meat, its quality, and prefer regional products. Nevertheless, there would be a market for U.S. high quality beef for the upper scale gastronomy. At present this demand is covered by beef imported from Argentina

Fish and Seafood Products

Domestic fish production is marginal and limited to trout and carp. Since the country is landlocked, all marine fish, shellfish and crustacean must be imported. Total seafood imports in 2008 were valued at $ 428.2 million. Due to transhipment within the EU, the real value of imports is thought to be much higher. From 2005 to 2007, imports from the U.S. increased by 221% in value. The main seafood items from the U.S. include fresh/frozen fish and prepared seafood products.

The Austrian market offers small but lucrative opportunities for U.S. exporters due to geographical separation, lower tariffs for EFTA members (Iceland and Norway) and free imports from other EU members with large seafood industries such as Germany, Denmark, Netherlands, and Sweden. However, since demand for luxury products is growing, some sales prospects exist for U.S. seafood such as salmon, lobster, crab, shrimp and related preserved fish products.

A good potential market should also exist for catfish and catfish products, fresh and breaded.

Alcoholic and Non-alcoholic Beverages

Alcoholic and Non-alcoholic beverages are number one in the ranking and importance within the Austrian food processing sector. The Austrian soft drink and fruit juice consumer focuses on two major concerns: on the one hand, taste, health and naturalness and on the other hand, comfort, convenience and practicality.

Domestic producers remain the dominant force in the Austrian alcoholic drinks market. The dominance is particularly strong in beer where imports account for only 5% of total volumes. From this low level, imported beers grew slightly ahead of domestic beer, mainly because of widening distribution. Brau Union was the leader in the Austrian beer sector with a 52% share of sector volume sales in 2006 and a wide range of brands. Far behind was Stieglbrauerei zu Riedenburg with a share of just over 10% and in third place was the Vienna-based company Ottakringer Brauerei AG with only 5% of sector volume sales.

In spirits, brands owned by multinationals continued to gain share at the expense of domestic spirits (mainly brown spirits such as domestic rum or brandy). This is due of an ongoing shift towards international premium spirits with vodka and whiskey among the winners.

In the wine sector, Austrian wines managed to slightly increase their already large share of some 82% of the total national wine consumption. National retailers continue to increase their ranges of Austrian wines rather than just relying on (mainly Italian) imports. The remaining market share is covered by Italy, Spain and New World wines. The total market share of U.S. wine exports increased from 1.38% in 2007 to 1.71% in 2008, and in value from $3.2 million in 2007 to $4.1 million in 2008. U.S.wine sales increased in retail stores (major discounters carry inexpensive U.S. wines) but has lost market shares in the upscale price range destined for the HRI sector.

Austria is a net exporter for fruit juices and non-alcoholic beverages. Coca-Cola Austria GmbH leads in the Austrian soft drinks market. Apart from a few German companies such as Eckes AG, all the key players in soft drinks are domestic companies. Domestic companies are also quite successful internationally, as Red Bull, for example, demonstrates. Private label penetration of soft drinks in Austria is very high, having garnered 9% of off-trade volume sales in 2007.

<u>Snack Foods</u>

Kelly Gmbh, as the largest Austrian snack food producer, covers 62% of the Austrian snack food market. It is a major exporter into the surrounding Central European countries. Austrian consumers are increasingly health conscious and want a niche market for specialized healthy snack. Local food producers launched miniature versions of confectionaries and snack foods which allows health conscious consumer to enjoy a small indulgence. Innovative, exotic and healthy snacks are in increasing demand and present a market opportunity for U.S. exporters.

<u>Pet Food</u>

The clear leader in dog food in 2007 is Mars Austria OHG (formerly known as Masterfoods), with a market share approaching 50% of the total pet food consumption.. Mars Austria is followed by private label products with a market share of 29% of which 8% was generated by Rewe Austria AG. Well established brands, as well as a loyal consumer base, ensure a stable position for these manufacturers.

Mars Austria produces confectionary, general foods stuffs (Uncle Bens rice etc) and pet food. The total sales for 2007 was €406 million. Mars Austria exports 59% of their total turnovers. The sales for Austria totale €168million, of which 61.3% were pet food products

.

Dried Fruits and Nuts

Austria’s imports of dried fruits and nuts has increased by 18.4 % from 2007 to 2008. The U.S. market share position has been constant the last years. The United States is the fourth most important supplier of dried fruits and nuts for Austria.. The U.S. market share has increased from $9.4 million in 2007 to $13.0 million in 2008.

The two leading companies for dried fruits and nuts are VOG AG & Farmgold.

VOG AG**,** is an international trading company for food- and nonfood products as well as beverages. Since 1975 VOG AG has also been involved in production of food products. Total turnover in 2008 in Austria in 2008 was €121.00million.

Farmgold is the second largest packer in Austria. Total turnover in 2008 was €14million. Farm Gold is one of the most important suppliers of dry fruits, nuts and seed for more than 6 decades.

II. COMPETITION

Product Category in Million US$	**Major Supply Sources 2007**	**Strengths of Key Supply Countries**	**Advantages and Disadvantages of local suppliers**
Almonds Total Imports: 15.6 USA 2006 7.1 2008 8.0	USA (51.49 %) Spain (13.5 %) Germany (13.21%)	U.S. has always been major supplier, Spain has local product available. Germany functions only as importer/distri-butor no local product available.	No local supply available
Dried Fruits & Nuts Total imports:143 USA 2006 11.7 2008 13.0	Germany 26,3% Itay 14.4% USA 9.0 %	Germany does not have enough local product available, functions mainly as importer/ distributor; USA major supplier for peanuts, almonds, prunes – U.S. market position is a price and supply sensitive market position (e.g. Walnuts, tree nuts)	Not enough local product available.
Wines **Total Imports: 243.6** USA 2006 3.2 2008 4.1	Italy 41.6% France 27% USA 1.7%	Although a finished product Italian and French wine is sometimes imported in bulk and then	Local produced wine has 81% of market share. Strong preferences exists for domestic wine, but prices have increased over the last

		bottled in the country. Italy& France have trade advantages through proximity & similar tastes; US market position maintains stable – high priced product	years – average bottle ranges between € 7-23/bottle. Due to economic crisis, price for local produced wine needs to decrease to be price competitive. This brings market advantaged for U.S. wine, the product sold in retails is sometimes bottled in Europe and sold in the range of € 5-10/bottle .
Petfood **Total Imports:182.8** USA 2006 2.7 2008 3.9	Germany 41.3 % Liechtenstein 23% USA 2.1%	Germany and Liechtenstein functions as transshipment locations product might origin from USA or other countries	A large local producer dominates approx. 50% of the local market. Recent statistics show there is room for additional US imports for the domestic market.
Seafood **Total Imports: 428.2** USA 2006 1.9 2008 1.4	Germany 41,.5% Netherlands 11.9% USA 0.33%	Germany and Netherlands are seaside countries, but function mostly as transhippers for processed product into Austria	Only freshwater fish locally available. There are small smokers for salmon and processors for hake and pollock
Fruits & Vegetable Juices **Total Imports:446** USA 2006 0.71 2008 3.8	Poland 21.1% Germany 13.6% USA 0,86%	Poland & Germany have market advantages due to proximity and large local juice production. Nevertheless U.S. share is increasing niche market for certain U.S. healthy and wellness drinks	Local production of fruit juices and non alcoholic beverages is second most important food processing sector in Austria. Austria is large exporter

SECTION IV. BEST PRODUCT PROSPECTS

Category A: Products Present in the Market That Have Good Sales Potential

Almonds (organic products), processed fruits and vegetables juices(including organic products), wine, pet food, convenience food, ready meals, health food products, non-biotech products.

Category B: Products not Present in Sufficient Quantities but That Have Good Sales Potential

Pecans, tree nuts, cranberries, cranberry jam, cranberry juice, seafood; niche market for buffalo, antelope.

Category C: Products not Present because They Face Significant Barriers

U.S. high quality beef: Presently only U.S. high quality beef (HQB) originating from cattle not raised with growth promoters can be imported.

U.S. turkey exports would be competitive to meet Austria's rising turkey demand if the EU approved U.S. poultry slaughter plants.
Products that have to be labeled under the EU labeling regulation EC 1830/2003 (concerning the traceability and labeling of genetically modified organisms and the traceability and labeling of food and feed products produced from genetically modified organisms) have almost no chance to be stocked in Austrian supermarkets because of the green biotech hostile environment.

SECTION V. POST CONTACT AND FURTHER INFORMATION

If you have questions or comments regarding this report, or need assistance exporting to Austria, please contact the U.S. Office of Agricultural Affairs in Vienna, Austria.

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Exchange rate 2008 = 1 US$ = 0.683Euro

Source for foreign trade statistics: Global Trade Atlas