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Austria

EXPORTER GUIDE ANNUAL

Road Map to the Austrian Market

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Report Highlights:
Austria is a small but highly developed agricultural and food market with a high income level and a high standard of living. Despite the fact that foods and beverages from Austria, Germany, and other EU countries dominate the shelves of Austrian retail, there are good market opportunities for U.S. products, particularly in the prime quality sector. Consumer oriented food and beverage products are the most important agricultural imports from the United States. In 2008, the consumer oriented sector accounted for 52 percent of total imports from the United States and reached a value of $ 58 million, which is an increase of 37.6 percent compared to 2007. Market opportunities for U.S. products include fish and seafood products, nuts, wine, pet foods, dried fruits, fruit juices, snack foods, and high quality beef.

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Vienna

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I. Market Overview

Economic Situation and How It Affects Consumer Spending and Sales of U.S. Products

Austria has a small but highly developed market economy and a high standard of living. It occupies a strategic position in the center of Western Europe and is closely tied to other EU economies, especially Germany's. The Austrian economy is characterized by a large service sector, a sound industrial sector, and a small, but highly developed agricultural sector. On an average, the Austrian economy performs better than the EU average.

In 2009, the global economic crisis affected Austria's economy more negatively than expected. Austria's dependency on the automobile industry and its exposure to the German and central European market created serious problems at the beginning of 2009. For the entire year 2009, the Austrian Institute of Economic Research forecasts a fall in demand and output in Austria by 3.4 percent in real terms.

Austrian and international policy actions begin to have a stabilizing effect. As a consequence, GDP already started heading up again in the second half of 2009. In 2010, growth will remain at a modest 1 percent and job losses will continue into the next year, accompanied by a further rise in unemployment, which continues to remain low compared to the EU average.

In October 2009, Statistik Austria reports an EU-harmonized inflation rate of 0.1 percent for Austria, whereas 0.5 percent is reported for the EU-27. A trend of fairly stable prices is seen since May 2009. Especially food and beverages had a price cushioning effect. Year-on-year comparison in October 2009 resulted in a price reduction of food and non-alcoholic beverages by 1 percent.

In 2009, due to the global recession total consumer expenditures by value are expected to decrease by 0.3 percent compared to the previous year. Because of lower food prices and a tendency to choose lower-cost alternate products, food expenditures even dropped by 0.8 percent during the same period. Food expenditures are predicted to recover and increase again in 2010.

Consumer Expenditures Austria in Euro Per Capita - Value at Current Prices

Categories	2005	2006	2007	2008	2009*	2010*
Consumer expenditure	16,618	17,152	17,642	18,250	18,194	18,465
Consumer expenditure on food and non-alcoholic beverages	1,754	1,805	1,912	2,001	1,985	2,000
Consumer expenditure on alcoholic beverages and tobacco	550	538	540	567	565	565

* Forecast
Source: Euromonitor International

Despite the fact that foods and beverages from Austria, Germany, and other EU countries dominate the shelves of Austrian retail outlets, there are some good market opportunities for U.S. products, particularly in the prime quality sector. In 2008, Austrian agricultural, fish, and forestry products imports from the United States remained unchanged compared to 2007 and totaled to $ 112.7 million. Consumer oriented food and beverage products are the most important sector. In 2008, the consumer oriented sector accounted for 52 percent of total imports from the United States and reached a value of $ 58 million, which is an increase of 37.6 percent from 2007 (Source: Global Trade Atlas). These numbers do not include significant and steadily growing transshipments of U.S. products from other EU countries.

Austrian Imports from the United States of Consumer-Oriented and Fishery Products in 2008

Product Category	Value, Thousands of $	Growth 2004 - 2008 in %
OTHER CONSUMER ORIENTED PRODUCTS	20,417	-18
TREE NUTS	10,750	76
PROCESSED FRUIT & VEGETABLES	9,262	67
WINE & BEER	4,092	-22
FRUIT & VEGETABLE JUICES	4,012	167
PET FOODS (DOG & CAT FOOD)	3,590	50
SNACK FOODS (EXCLUD. NUTS)	2,158	53
EGGS & PRODUCTS	1,288	-3
DAIRY PRODUCTS (EXCL. CHEESE)	832	27,633
FRESH FRUIT	654	33
RED MEATS,FRESH/CHILLED/FROZEN	452	653
SALMON	434	309
OTHER FISHERY PRODUCTS	397	467
FRESH VEGETABLES	337	-83
CRUSTACEANS	296	517
NURSERY PRODUCTS & CUT FLOWERS	238	114
MOLLUSCS	173	226
GROUNDFIST & FLATFISH	149	26
RED MEATS, PREPARED/PRESERVED	32	3,100
BREAKFAST CEREALS/PANCAKE MIX	15	36

Source: Global Trade Atlas

Key Demographic Developments and Their Impact on Consumer Buying Habits

Austria has a population of 8.2 million. The number of single households and childless double working partnerships is continuously rising. While in 1990, 814,000 single households existed in Austria, the number increased to almost 1.3 million in 2008. This corresponds to 35.4 % of all households. In 2008, an average household consisted of 2.31 people.

The rise in single households boosts demand for convenience products and for food eaten outside the home. Singles are not only young urban working people but also retired persons. The rising number of elderly people, many of whom have significant disposable income, creates additional demand for health and dietetic foods. In 2008, 22.6 % of the total population was over 60 years old.

Food Market and Trends

When responding to polls, consumers usually express a preference for high quality foods; however, when it comes to actually buying, price appears to be the major purchasing factor for a majority of the population. Because of the global crisis, consumers tend more and more to buy lower-priced alternate products. This will change again with the recovering economy. However, for special events most people, even those on a low income, are willing to spend more for “exclusive” products. In addition, the higher income and gourmet market segments (which regular buy high priced foods) are growing.

The traditional Austrian diet is based on pork, flour, and vegetables. Cakes and bakery products are also important parts of the diet. Austrian dishes are rich in cholesterol and fat and the most important ingredient is meat, either pork or beef.

The increasing interest in a healthy lifestyle, especially among younger people, who are more concerned about their daily calorie – intake and a healthy diet, makes low-fat food more and more popular. The younger generation also appreciates trying new products with appealing image along with good taste.

Because of environmental concerns, a very negative perspective of Austrian consumers towards biotech products, and food safety scares, there is a reliable and still growing market for organic products. The market share in food retail accounts for about 5%. Austria is the EU country with the highest percentage of organic farms.

Due to the increasing number of single households and the rising number of older people seeking companionship, the number of pets should continue its upward trend. This should stimulate demand for pet food.

Advantages and Challenges for U.S. Suppliers on the Austrian Market

Advantages/Opportunities	Challenges/Constraints
High income level of the Austrian population and stable economy	Foods containing or made from biotech products are not accepted by consumers and retailers
Urban population growing, which boosts demand for international food	Competition from EU member states
U.S. style food is popular, especially among the younger generation	Products must meet strict Austrian/EU/retailer requirements
Good reputation of certain U.S. products like dried fruits and nuts	Austrian buyers demand quality but also low prices

Growing market for organic, sustainable and health food products	High promotion costs to increase consumer awareness
The Austrian climate limits growing seasons and types of products grown	Highly concentrated food retail market
Good infrastructure, efficient distribution system, most importers speak English	Difficult to acquire shelf space in large supermarket chains
Marginal domestic seafood production	Usually relatively small quantities are imported.
Growing interest in ethnic foods and sea foods due to rising vacations in distant and costal areas	Lack of areness of high U.S. quality by consumers
Growing pet food market	Retailers rarely import products into Austria, they prefer purchases from central buyers including other member states (mainly Germany)

II. Exporter Business Tips

Local Business Customs

In general, food retailers buy domestic and imported products from Austrian and/or German wholesalers. The large supermarket chains have their own purchasing sections, which buy and store foodstuffs centrally for their own retail stores. The central purchasing sections import directly in some instances. However, some items are purchased through wholesale importers (i.e. almonds). Due to the strong concentration of the food retail sector, the supermarket chains are very powerful vis-a-vis producers and slotting fees for retail space are the norm.

General Consumer Tastes and Preferences

Traditionally, Austrians have conservative tastes which are reflected in the local cuisine and in local production methods and marketing. However, the younger generation appreciates trying new food products and beverages.

Austrians prefer foods without artificial flavors, stabilizers, emulsifiers, and preservatives. In addition, most consumers reject foods containing biotech products. For this reason, the leading supermarket chains have banned such products from their shelves.

Similarly, there is significant consumer interest in organic products. Sales of organic products account for about 5 percent of retail sales. Economists believe that organic products may someday reach 10% of the total food market. “Light” products are also on a rising trend; however, consumers do not seem to tolerate a loss in flavor as compared to “normal” products.

As in other western countries, beef consumption has been declining, whereas pork, poultry, and lamb have been increasing. The latter is mainly a result of immigration from Middle Eastern countries. Because of the financial crisis consumers tend to buy less expensive meat cuts. Cheese consumption, which is already high, continues to rise. This is particularly true for semi-hard and fresh cheeses.

With fruit juices, a certain acidity is preferred. This applies also to white wines. Jams and marmalade are more appealing to Austrians if fruit pieces are included and if they are not too sweet. Cereals sell better if they are crunchy.

Food Standards and Regulations

See GAIN report:
Food and Agricultural Import Regulations and Standards Report AU9010 at:
http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp .

General Import and Inspection Procedures

Incoming goods go either to the customs storage (small) or to a freight forwarder's facility at transport terminals or airports. Storage and removal from storage is carried out under the supervision of a customs officer who compares the documents with the commodities. Later, the invoice for import duty is issued. Food inspectors at the port of entry do not routinely check packaged foods. However, the customs officer may take samples to double check for ingredients (sugar, milk powder, alcohol) and that customs duties are paid for these ingredients according to their proportion of the process product.

Veterinary and customs import documents must be in German. Veterinary certificates are usually bi-lingual. There is no appeal of decisions by the customs office or the veterinary service.

If an importer objects to the quality of the product, the case can be brought to the arbitration center.

Complete information on EU import rules for food products may be found at:
http://www.fas.usda.gov/posthome/useu/ .

III. Market Sector Structure and Trends

Food Market Structure

Since EU accession, concentration in the food industry and food retail sector has accelerated. Many food-processing companies are too small to survive alone in a large market and therefore merge with larger national or foreign firms. Apart from Spar Warenhandels AG all leading food retailers in Austria are large and powerful German retailer groups. The top five chains cover more than 90% of the domestic market. U.S. companies may be interested in acquiring Austrian retail chains.

Sales Volume of Leading Austrian Food Retail Chains, Million Euros

Food Retail Chain	2007	2008	Growth 2007-2008
REWE Austria	5,009	5,041	0.6
Spar	4,400	4,491	2.1
Hofer	2,970	3,085	3.9
ZEV MARKANT incl. PFEIFFER	840	848	0.9
ADEG	872	845	-3.1
Zielpunkt/ Plus	712	719	1.1
Lidl	580	595	2.6

Source: Euromonitor International

Domestic Industry Capacity versus Availability of Foreign-Supplied Products

More than three-quarters of all agricultural supplies, including raw material for the food industry, comes from other EU countries.   Regarding imports of processed foods, 90% come from other EU countries.

The strongest branch of Austria's food industry is the beverage sector, particularly the brewing industry and the fruit juice industry. The latter imports concentrated citrus juices, particularly orange juice. The hard alcohol drinks industry is suffering from heavy competition.

Trends in Promotional/Marketing Strategies and Tactics

The most efficient advertising is television, which nonetheless tends to be more expensive in Austria than in the United States. The industry uses this medium for promoting food and pet food brands, and the two largest supermarket chains have regular TV spots. Supermarket, hypermarket and discounter chains have their own weekly or bi-weekly flyers in which products available in their stores are advertised. These fliers reach a wide range of interested purchasers and thus are regarded as efficient. In-store promotions are also very successful. There are several U.S. products which have good chances on the Austrian market, dried fruits and nuts, seafood, wine, etc.

Trends in Tourism Sales, Holiday Gift sales, and Internet Sales

Tourism contributed about Euro 23.6 billion to Austria's GDP in 2008 and plays an important economic role. In 2008, 127 million overnight stays by tourists were logged. The major share of tourists comes from Germany followed by Netherlands. The main tourist areas are the western and southern alpine regions.

In general, tourists, particularly those from Germany, favor the local Austrian cuisine during their vacation. However, in recent years ethnic foods have become more popular (because of immigration and Austrians traveling abroad) and the demand for seafood has increased.

There are only marginal internet sales for food products.

IV. Best High-Value Product Prospects

Consumer oriented and fishery products, which offer the best U.S. export opportunities, are as follow.

Product Category	Total Austrian Imports 2008 in thousands of U.S. $	Austrian Imports from the U.S. 2008 in thousands of U.S. $	U.S. Import Growth 5 Year Average (2004-2008)
Fish and Seafood Products	429,455*	1,877*	248 %*
The Austrian market offers small but lucrative opportunities for fish and seafood products. Fish consumption in Austria is growing as consumers associate fishery products with a modern healthy diet. Domestic fish production is marginal and limited to fresh water fish like trout and carp. Due to transshipment within the EU, the real value of imports from the United States is thought to be much higher than indicated in customs statistics. Best prospects for U.S. fish and seafood exports are salmon, lobster, shrimps, crabs, caviar substitutes, catfish and scallops.			

Source: * Global Trade Atlas

Product Category	Total Austrian Imports 2008 in thousands of U.S. $	Austrian Imports from the U.S. 2008 in thousands of U.S. $	U.S. Import Growth 5 Year Average (2004-2008)
Tree Nuts	88,489*	10,750*	76 %*
The United States is the third most important supplier of nuts to Austria. Most tree nuts are used as ingredients by the food processing sector. Almonds are the most important commodity within this category. Further products with good sales potential include walnuts, pistachios, pecans, and hazelnuts.			

Source: * Global Trade Atlas

Product Category	Total Austrian Imports 2008 in thousands of U.S. $	Austrian Imports from the U.S. 2008 in thousands of U.S. $	U.S. Import Growth

			3 Year Average (2006-2008)
Wine and Beer	316,320*	4,092*	25 %*
Austria has traditionally a high share of domestic wine consumption. However, good prospects exist for “new world wines” including those from the United States. In 2008, the United States was the sixth most important supplier of wine (by value) in Austria. U.S. wine sales increased in retail stores including discounters who mainly carry inexpensive U.S. wines.			

Source: * Global Trade Atlas

Product Category	Total Austrian Imports 2008 in thousands of U.S. $	Austrian Imports from the U.S. 2008 in thousands of U.S. $	U.S. Import Growth 5 Year Average (2004-2008)
Pet Foods	184,115*	3,590*	50 %*
Since dog and cat population in Austria is steadily increasing, the demand for dog and cat food is also rising. Austrian companies dominate the pet food market, however, U.S. pet food and ingredients have good market prospects.			

Source: * Global Trade Atlas

Product Category	Total Austrian Imports 2008 in thousands of U.S. $	Austrian Imports from the U.S. 2008 in thousands of U.S. $	U.S. Import Growth 5 Year Average (2004-2008)
Processed Fruits and Vegetables	727,515*	9,262*	67 %*
Austrian imports of processed fruits and vegetables – mainly prepared nuts/seeds and dried fruits – are constantly growing. Those products are mostly used as ingredients by the food-processing sector for the production of pastries and breakfast cereals. Dried fruits and prepared nuts are also popular as a snack.			

Source: * Global Trade Atlas

Product Category	Total Austrian Imports 2008 in thousands of U.S. $	Austrian Imports from the U.S. 2008 in thousands of U.S. $	U.S. Import Growth 5 Year Average (2004-2008)
Fruit and Vegetable Juices	448,242*	4,012*	167 %*
A very strong fruit juice industry makes Austria number seven of most important fruit juice importers worldwide. The demand for fruit juices has been steadily growing over the past years. Good opportunities for U.S. fruit juices in the Austrian market are citrus and cranberry juices.			

Source: * Global Trade Atlas

Product Category	Total Austrian Imports 2008 in thousands of U.S. $	Austrian Imports from the U.S. 2008 in thousands of U.S. $	U.S. Import Growth 5 Year Average (2004-2008)
Snack Foods (Excl. Nuts)	767,109*	2,158*	53 %*
The Austrian demand for healthy, organic, innovative, and exotic snacks continues to grow.			

Source: * Global Trade Atlas

Product Category	Total Austrian Imports 2008 in thousands of U.S. $	Austrian Imports from the U.S. 2008 in thousands of U.S. $	U.S. Import Growth 5 Year Average (2004-2008)
Red Meats Fresh/Chilled/Frozen Prepared/Preserved	952,886*	484*	707 %*
Limited but lucrative opportunities exist for U.S. hormone free high quality beef, game and exotic meat for the upper scale gastronomy.			

Source: * Global Trade Atlas

V. Key Contacts and Further Information

American Embassy
Office of Agricultural Affairs
Boltzmanngasse 16
A-1090 Wien
Phone: + 43 (1) 31 339/ext 2364 or 2293
Fax: + 43 (1) 310 8208
Email: agvienna@fas.usda.gov
Website: http://www.usembassy.at/en/usda/

Bundesministerium fuer Wirtschaft, Familie und Jugend
(Federal Ministry of Economy, Family and Youth)
Stubenring 1
A-1011 Wien
Phone: + 43 (1) 71100 – 0 or + 43 - 810 - 013571

Email: service@bmwfj.gv.at
Website: http//.www.bmwfj.gv.at/

Bundesministerium fuer Land- und Forstwirschaft, Umwelt und Wasserwirtschaft
(Federal Ministry for Agriculture and Forestry, Environment and Water Management)
Abteilung III 2
(Division III 2)
Stubenring 1
A-1011 Wien
Phone: + 43 (1) 71100/ext. 2759
Email: infomaster@lebensministerium.at
Website: http://www.lebensministerium.at

Bundesministerium für Gesundheit
(Federal Ministry of Health)
Radetzkystraße 2
1030 Wien
Tel. +43-1/711 00-0
Fax +43-1/711 00-14300
Website: http://www.bmgfj.gv.at

Agrarmarkt Austria (AMA)
(Agricultural Market Austria)
Dresdnerstr. 70
A-1200 Wien
Phone: + 43 (1) 33 151 - 0
Fax: + 43 (1) 33 151 299
Email: office@ama.gv.at
Website: http://www.ama.at

Austrian Economic Chamber
Wiedner Hauptstr. 63
A-1045 Wien
Phone: + 43 (5) 90 900
Fax: + 43 (1) 502 06 250
Email: office@wko.at
Website: http://wko.at

Bundesanstalt fuer Lebensmitteluntersuchung und -Forschung
Kinderspitalg. 15

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Website: http://www.luvie.ages.at/

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Lebensmitteluntersuchungsanstalt der Stadt Wien
Henneberggg. 3
A-1030 Wien, Austria
Phone: + 43 (1) 795 14 97955
Fax: + 43 (1) 79514 99 97955

Oesterreichische Agentur fuer Gesundheit und Ernaehrungssicherheit
(Austrian Agency for Health and Food Safety)
Spargelfeldstrasse 191
Postfach 400

A-1226 Wien
Phone: + 43 (5) 0555 – 0
Fax: + 43 (5) 0555 - 22019
Website: http://www.ages.at/

Appendix I

Table A. Key Trade and Demographic Information

AUSTRIA

KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%) 1)	2008	12,135/ 0.78%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%) 1)	2008	8,815/ 0.66%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%) 1)	2008	429/ 0.34%
Total Population (Millions)/Annual Growth Rate (%) 2)	2008	8.2/ 0.05%
Urban Population (%)/ Rate of Urbanization (%) 2)	2008	67% / 0.7%
Number of Major Metropolitan Areas	2008	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars) 2)	2008	$40,200
Unemployment Rate (%) 2)	2008	3.8%
Standardized Weighted Per Capita Food Expenditures (U.S. Dollars) 3)	20004/05	$2,713
Percent of Female Population Employed (15 to 65 years old) 3)	2008	65.8%
Average Exchange Rate 2008 (US$1 = 0.683 Euro) 4)	2008	0.683

1) Source: Global Trade Atlas

2) Source: CIA World Factbook

3) Source: Statistik Austria

4) Source: OANDA.com

Table B. Consumer Food & Edible Fishery Product Imports

Austria Imports (In Millions of U.S. Dollars)									
Commodity	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2006	2007	2008	2006	2007	2008	2006	2007	2008

CONSUMER-ORIENTED AGRIC. TOTAL	6,127	7,621	8,815	37	42	58	0.60	0.55	0.66
Snack Foods (Excl. Nuts)	581	678	767	1	2	2	0.24	0.26	0.28
Breakfast Cereals & Pancake Mix	51	65	74	0	0	0	0.07	0.05	0.02
Red Meats, Fresh/Chilled/Frozen	461	526	672	1	1	0	0.20	0.10	0.07
Red Meats, Prepared/Preserved	182	238	281	0	0	0	0.00	0.01	0.01
Poultry Meat	176	272	288	0	0	0	0.02	0.00	0.00
Dairy Products (Excl. Cheese)	321	430	465	0	2	1	0.01	0.46	0.18
Cheese	316	414	493	0	0	0	0.04	0.00	0.00
Eggs & Products	55	74	91	1	1	1	2.00	1.54	1.41
Fresh Fruit	498	578	733	0	0	1	0.06	0.06	0.09
Fresh Vegetables	385	446	491	0	0	0	0.06	0.05	0.07
Processed Fruit & Vegetables	489	610	728	5	5	9	1.04	0.84	1.27
Fruit & Vegetable Juices	281	434	448	1	2	4	0.25	0.35	0.90
Tree Nuts	77	82	88	11	9	11	13.84	10.48	12.15
Wine & Beer	250	303	316	3	3	4	1.31	1.08	1.29
Nursery Products & Cut Flowers	329	440	449	0	0	0	0.03	0.05	0.05
Pet Foods (Dog & Cat Food)	138	166	184	3	3	4	2.02	2.03	1.95
Other Consumer Oriented Products	1,536	1,866	2,247	10	14	20	0.65	0.76	0.91
FISH & SEAFOOD PRODUCTS	316	415	429	2	2	1	0.63	0.45	0.34
Salmon	32	51	49	1	1	0	2.81	2.32	0.89
Surimi	3	5	4	0	0	0	0.00	0.00	0.00
Crustaceans	39	53	53	0	0	0	0.40	0.58	0.55
Groundfish & Flatfish	82	104	99	0	0	0	0.58	0.17	0.15
Molluscs	10	14	14	0	0	0	1.03	1.06	1.21
Other Fishery Products	150	189	209	0	0	0	0.25	0.03	0.19
AGRICULTURAL PRODUCTS TOTAL	8,323	10,295	12,135	76	91	94	0.91	0.88	0.78
AGRICULTURAL, FISH & FORESTRY TOTAL	11,029	13,459	15,309	95	113	113	0.86	0.84	0.74

Source: Global Trade Atlas

Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products

Consumer Oriented Agricultural Total (In Millions of U.S. Dollars)			
Top 15 Supplier	2006	2007	2008
Germany	2,584	3,172	3,693
Italy	712	877	1,025
Netherlands	511	662	746
Spain	257	297	328
France	245	289	317
Switzerland	153	225	313
Hungary	200	236	313
Poland	200	286	312
Belgium	112	141	158

Turkey	103	122	126
Ireland	36	55	121
Czech Republic	66	84	106
Brazil	63	104	98
China	44	86	93
Denmark	48	62	70
World	6,127	7,621	8,815

Source: Global Trade Atlas

Fish & Seafood Products (In Millions of U.S. Dollars)			
Top 15 Supplier	2006	2007	2008
Germany	143	188	176
Netherlands	28	40	51
Italy	23	30	32
Denmark	29	36	30
Thailand	10	14	18
France	10	12	14
Norway	10	10	13
Vietnam	3	6	8
Portugal	5	6	7
Poland	2	5	7
India	2	4	6
Chile	4	5	5
Kazakhstan	3	4	5
Spain	3	4	5
Czech Republic	2	4	5
World	316	415	429

Source: Global Trade Atlas