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Austria

Exporter Guide

Road Map to the Austrian Market

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Report Highlights:
Despite the economic down-turn, consumer expenditures in Austria continue to increase in real terms, growing by 1.2 percent in 2009. Further increases of 1 percent are forecast for 2010. Although foods and beverages from Austria, Germany, and other EU countries dominate Austrian retail shelf space, there are good market opportunities for U.S. products, particularly at the upper end of the market. Consumer oriented food and beverage products remain the most important U.S. agricultural trade items. In 2009, the consumer oriented sector accounted for 59 percent of total agricultural, fish and forestry imports from the United States, worth $49 million. Market opportunities for U.S. products include fish and seafood products, nuts, wine, pet foods, dried fruits, fruit juices, snack foods, and grain-fed beef.

Post:
Vienna

Executive Summary:

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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. Austria is a part of the EU single market and customs union and uses the Euro. International trade negotiations for all EU members are conducted by the European Commission (EC). The Austrian economy is characterized by a large service sector, a sound industrial sector, and a small, but highly developed agricultural sector. The Austrian economy tends to perform better than the EU average.

In 2009, the global economic crisis affected Austria's economy more negatively than expected. But after stagnation at the beginning of 2010, the Austrian economy grew at a quarter-on-quarter rate of 1.2 percent in real terms in the second quarter of 2010. In year-on-year terms, the growth rate was 2.4

percent. Exports and investment were the main drivers of the expansion. Industrial production grew vigorously from a year before. Labor market conditions continue to improve.

By 2009, the unemployment rate was at 4.8 percent which is considerably lower than the EU average. By 2011, the government deficit, including planned consolidation measures, should narrow to 3.5 percent of GDP. The Austrian economy is ranked 17th out of 133 countries in the World Economic Forum's (WEF) global competitiveness index 2009-2010.

Despite the economic down turn, consumer expenditures in Austria grew slightly in 2009, posting a real increase of 1.2 percent in real terms. Consumer spending is expected to continue growing in Austria as the economy recovers and is forecast to grow 1.0 percent in real terms in 2010. In 2009, the only sectors to experience declines in consumer spending were the alcohol, tobacco, and transportation. Food and non-alcoholic beverages showed growth. In 2009, Austrian consumer expenditures on food and beverages (non-alcoholic and alcoholic including tobacco) accounted for 14 percent of total consumer expenditures.

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

Consumer Expenditures	2006	2007	2008	2009	2010 *	2011 *
Consumer expenditures	17,150	17,631	18,165	18,222	18,805	19,453
Consumer expenditures on food and non-alcoholic beverages	1,804	1,910	2,020	2,028	2,092	2,122
Consumer expenditures on alcoholic beverages and tobacco	538	540	548	539	549	563

* Forecast

Source: Euromonitor International

Although foods and beverages from Austria, Germany, and other EU countries dominate Austrian retail shelf space, there are good market opportunities for U.S. products, particularly at the upper end of the market. Consumer oriented food and beverage products remain the most important agricultural imports from the United States. In 2009, the consumer oriented sector accounted for 59 percent of total agricultural, fish and forestry imports from the United States worth $ 49 million (source: Global Trade Atlas). Agricultural imports from the United States decreased in 2009 due to the global economic crisis but are expected to recover again in 2010. Official import 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 2009

Product Category	Value, Thousands of $	Growth 2005 - 2009 in %
OTHER CONSUMER ORIENTED PRODUC	14,028	58
TREE NUTS	10,445	14
PROCESSED FRUIT & VEGETABLES	7,346	35
WINE & BEER	4,507	24
PET FOODS (DOG & CAT FOOD)	3,858	34
FRUIT & VEGETABLE JUICES	2,109	27

EGGS & PRODUCTS	1,922	46
SNACK FOODS (EXCLUD. NUTS)	1,905	36
RED MEATS,FRESH/CHILLED/FROZEN	1,589	5,197
OTHER FISHERY PRODUCTS	1,296	318
SALMON	711	323
FRESH FRUIT	360	30
NURSERY PRODUCTS & CUT FLOWERS	253	-79
MOLLUSCS	139	42
CRUSTACEANS	133	73
BREAKFAST CEREALS/PANCAKE MIX	109	990
FRESH VEGETABLES	88	-37
DAIRY PRODUCTS (EXCL. CHEESE)	37	517
RED MEATS, PREPARED/PRESERVED	31	3,000
POULTRY MEAT	0	0
CHEESE	0	0
SURIMI	0	0
GROUNDFISH & FLATFISH	0	0

Source: Global Trade Atlas

Key Demographic Developments and Their Impact on Consumer Buying Habits

Austria has a population of 8.3 million. The number of single households and childless double working partnerships is rising. While in 1990, 814,000 single households existed in Austria, the number increased to almost 1.3 million in 2009. This corresponds to 36 percent of all households. In 2009, an average household consisted of 2.3 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 specialty nutrition products. In 2009, 23% 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. One result of the global economic difficulties is that Austrian consumers are tending to buy lower-priced alternate products. This is slowly changing 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 regularly buy high priced foods) are growing.

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

There is an increasing interest in healthy lifestyles, especially among younger consumers, who are expressing more concern about daily calorie intake and a healthy diet, making low-fat food more and more popular. The younger generation also appreciates trying new products and is a logical segment to aim for with many new product introductions.

Biotech products have a very negative image among the Austrian public. Food products that have to be labeled as biotech do not sell in Austria and cannot be found in Austrian retail stores. A counterpoint to the negative view of biotech crops is Austria’s growing market for organic agricultural products. The market share of organics in food retail accounts for about 5% and Austria has the highest percentage of organic farms in the EU.

Due to the increasing number of single households and the rising number of older people seeking companionship, the number of pets should continue to increase, further stimulating 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
Only fresh water fish production (landlocked country)	Growing retailers’ promotion and consumer awareness of carbon footprint results in disadvantage for products with long-distance shipping
Growing interest in ethnic foods and sea foods due to rising vacations in distant and coastal areas	Lack of awareness 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, 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. As a result 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, tartness (higher acidity) is preferred to sweeter products. 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 processed product.

Veterinary and customs import documents must be in German. Veterinary certificates are usually bilingual. 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 in 1995, 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 Internationale Spar Centrale BV, all leading food retailers in Austria are part of large and powerful German retailer groups. The top three chains cover almost 70 percent of the domestic market.

Sales Volume of Leading Austrian Food Retail Chains, Million Euros

Food Retail Chain	2005	2006	2007	2008	2009	2010*
Rewe Group	4,625	4,811	5,084	5,981	5,951	6,035
Internationale Spar Centrale BV	4,157	4,306	4,500	4,784	4,907	5,247
Aldi Group	2,575	3,000	3,100	3,200	3,200	3,328

* Forecast
Source: Euromonitor International

Domestic Industry Capacity versus Availability of Foreign-Supplied Products

More than three-quarters of all agricultural supplies, including ingredients for the food industry, comes from other EU countries. Regarding imports of processed foods, about 90 percent 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 and discounted products in their stores are advertised. These fliers reach a wide range of interested purchasers and thus are regarded as efficient. In-store promotions can also be very successful. (See IV. Best High-Value Product Prospects).

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

Tourism contributed about Euro 21.3 billion to Austria's GDP in 2009 (almost 7 percent) and plays an important economic role. In 2009, 124 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 and the capitals of the federal states.

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 2009 in 1000 of U.S. $ *)	Austrian Imports from the U.S. 2009 in 1000 of U.S. $ *)	U.S. Import Growth 5 Years (2005-2009) *)	Market Attractiveness for USA
Fish and Seafood Products	403,869	2,279	171 %	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.
Tree Nuts	80,837	10,445	14 %	The United States is the third most important supplier of tree 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.
Wine and Beer	299,540	4,507	24 %	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 2009, 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.
Pet Foods	167,724	3,858	34 %	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.
Pro-cessed Fruits and Vege-tables	669,564	7,346	35 %	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.
Fruit and Vege-table Juices	256,212	2,109	27 %	A very strong fruit juice industry makes Austria one of the most important 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.
Snack Foods (Excl. Nuts)	742,290	1,905	36 %	The Austrian demand for healthy, organic, innovative, and exotic snacks continues to grow.
Red Meats Fresh/ Chilled/ Frozen	645,856	1,589	5,197 %	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

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Office of Agricultural Affairs
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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)
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A-1200 Wien
Phone: + 43 (1) 33 151 - 0
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Email: office@ama.gv.at
Website: http://www.ama.at

Wirtschaftskammer Oesterreich
(Austrian Economic Chamber)
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Bundesanstalt fuer Lebensmitteluntersuchung und –Forschung
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Oesterreichische Agentur fuer Gesundheit und Ernaehrungssicherheit
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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 ($Mil)/U.S. Market Share (%)[1)]	2009	10,644/ 0.73%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2009	7,991/ 0.61%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2009	404/ 0.56%
Total Population (Millions)/Annual Growth Rate (%)[2)]	2010	8.3/ 0.042%
Urban Population (%)/ Rate of Urbanization (%)[2)]	2008	67% / 0.7%
Number of Major Metropolitan Areas	2010	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)[2)]	2009	$39,200
Unemployment Rate (%)[2)]	2009	4.8%
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)]	2009	66.4%
Average Exchange Rate 2009 (US$1 = 0.719 Euro) [4)]	2009	0.719

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)									
	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2007	2008	2009	2007	2008	2009	2007	2008	2009
CONSUMER-ORIENTED AGRIC. TOTAL	7,591	8,786	7,991	42.2	58.1	48.6	0.56	0.66	0.61
Snack Foods (Excl. Nuts)	678	767	742	1.8	2.2	1.9	0.26	0.28	0.26
Breakfast Cereals & Pancake Mix	65	74	63	0.0	0.0	0.1	0.05	0.02	0.17
Red Meats, Fresh/Chilled/Frozen	526	672	646	0.5	0.5	1.6	0.10	0.07	0.25
Red Meats, Prepared/Preserved	238	281	273	0.0	0.0	0.0	0.01	0.01	0.01
Poultry Meat	272	288	296	0.0	0.0	0.0	0.00	0.00	0.00
Dairy Products (Incl. Cheese)	844	958	809	2.0	0.8	0.0	0.23	0.09	0.00
Eggs & Products	74	91	90	1.1	1.3	1.9	1.54	1.41	2.14
Fresh Fruit	578	733	650	0.3	0.7	0.4	0.06	0.09	0.06
Fresh Vegetables	446	491	468	0.2	0.3	0.1	0.05	0.07	0.02

Processed Fruit & Vegetables	610	728	670	5.1	9.3	7.3	0.84	1.27	1.10
Fruit & Vegetable Juices	434	448	256	1.5	4.0	2.1	0.35	0.90	0.82
Tree Nuts	82	88	81	8.6	10.8	10.4	10.48	12.15	12.92
Wine & Beer	303	316	300	3.3	4.1	4.5	1.08	1.29	1.50
Nursery Products & Cut Flowers	440	449	430	0.2	0.2	0.3	0.05	0.05	0.06
Pet Foods (Dog & Cat Food)	166	184	168	3.4	3.6	3.9	2.03	1.95	2.30
Other Consumer Oriented Products	1,836	2,218	2,052	14.1	20.4	14.0	0.77	0.92	0.68
FISH & SEAFOOD PRODUCTS	401	414	404	1.9	1.4	2.3	0.46	0.34	0.56
Salmon	51	49	48	1.2	0.4	0.7	2.32	0.89	1.49
Crustaceans	53	53	52	0.3	0.3	0.1	0.58	0.55	0.25
Groundfish & Flatfish	10	12	14	0.0	0.0	0.0	0.00	0.04	0.00
Molluscs	14	14	13	0.1	0.2	0.1	1.06	1.20	1.06
Other Fishery Products	272	285	277	0.2	0.5	1.3	0.08	0.17	0.47
AGRICULTURAL PRODUCTS TOTAL	10,280	12,123	10,644	91.3	94.4	77.9	0.89	0.78	0.73
AGRICULTURAL, FISH & FORESTRY TOTAL	13,578	15,433	13,609	113.3	113.4	92.3	0.83	0.73	0.68

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 Suppliers	2007	2008	2009
Germany	3,164	3,685	3,408
Italy	861	1,010	969
Netherlands	662	746	679
Switzerland	225	313	319
Spain	297	328	303
Hungary	236	312	281
France	286	312	275
Poland	285	312	218
Belgium	141	158	159
Turkey	122	125	112
Czech Republic	83	106	105
Ireland	55	121	73
Brazil	104	98	72
Costa Rica	45	68	68
Greece	53	58	61
World	7,591	8,786	7,991

Source: Global Trade Atlas

Fish & Seafood Products (In Millions of U.S. Dollars)			
Top 15 Suppliers	2007	2008	2009
Germany	186	173	159
Netherlands	40	50	44
Denmark	36	30	26
Italy	23	26	23
Norway	10	13	15
France	11	13	14
Vietnam	6	8	12
Thailand	14	18	10
Poland	5	6	9
Chile	5	5	8
Portugal	6	7	6
China	3	5	6
Spain	4	5	5
India	4	6	5
Bangladesh	3	4	5
World	401	414	404

Source: Global Trade Atlas