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Austria

Exporter Guide

Road Map to the Austrian Market

Approved By:
Paul Spencer
Prepared By:
Roswitha Krautgartner

Report Highlights:
Compared to other EU countries, the Austrian economy is performing relatively well. Austrian consumer expenditures have grown steadily in recent years and this is helping to drive up food and beverage sales. Although domestic, German, and European products tend to dominate Austrian food 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 Austria's most important agricultural imports from the United States. In 2011, the consumer-oriented sector accounted for 53 percent of total agricultural, fish and forestry imports from the United States, worth $ 56 million. Austrian consumer trends offer especially good market opportunities for sustainable, organic, health, diet and convenience food products. 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.

Post:
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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 with a high standard of living. It occupies a strategic position in the center of 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 a Eurozone member. The Austrian economy is characterized by a large service sector, a strong industrial sector, and a small, but highly developed agricultural sector. Austria is an export-driven economy and EU countries are its most important trading partners.

The Austrian economy tends to perform better than the EU average. Given the recession in the Eurozone, the Austrian economy is performing relatively well. After a sharp recession in 2009, caused by slack export demand, the Austrian economy started recovering in 2010 and 2011. The beginning of 2012 started with a strong economy but later in the year the economy became more and more affected by sluggish performance in the EU. Against this background, GDP growth for 2012 is only projected at 0.6 percent. According to the Austrian Institute of Economic Research (WIFO), the Austrian economy is expected to slightly accelerate again in 2013. (Source: WIFO)

Austria has one of the lowest unemployment rates in Europe. In 2011, the unemployment rate was at 4.2 percent which is considerably lower than the EU average. The Austrian inflation rate exceeds the Euro area average and reached 3.4 percent in 2011. (Source: Statistik Austria)

Austrian consumer expenditures have grown steadily in recent years and food and beverage sales have benefited. From 2008 to 2011, consumer expenditures on food and non-alcoholic beverages grew 5.3 percent. In 2011, Austrian consumer expenditures on food and beverages (non-alcoholic and alcoholic including tobacco) accounted for 13.4 percent of total consumer expenditures. The share of food and beverage expenditures is fairly stable. At the same time Austrian expenditures on food and non-alcoholic beverages grew by 3 percent year-on-year to Euro 19,590 per capita. (Source: Euromonitor)

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

Consumer Expenditures	2008	2009	2010	2011	2012 *	2013 *
Consumer expenditures	18,258.3	18,299.7	18,906.3	19,589.8	*20,134.4*	*20,659.8*
Consumer expenditures on food and non-alcoholic beverages	1,887.3	1,901.9	1,931.9	1,987.3	*2,034.0*	*2,073.7*
Consumer expenditures on alcoholic beverages and tobacco	616.5	624.0	633.6	656.1	*658.9*	*669.8*

* Forecast
Source: Euromonitor

Although foods and beverages from Austria, Germany, and other EU countries dominate Austrian retail shelf space, there are good 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 2011, the consumer oriented sector accounted for 53 percent of total agricultural, fish and forestry imports from the United States worth $ 56.3 million (source: Global Trade Atlas). In terms of value, consumer oriented products imported from the United States increased by 26 percent year-on-year in 2011. During the same period fish and seafood imports from the United States increased by 122 percent and reached $ 5.3 million. Official import numbers do not include significant and growing transshipments of U.S. products from other EU countries and actual U.S. trade may be considerable larger.

Austrian Imports from the United States of Consumer-Oriented and Fishery Products in 2011

Product Category	Value, Thousands of $ in 2011	Growth 2007 - 2011 in %
OTHER CONSUMER ORIENTED PRODUC	17,766	25.8
TREE NUTS	13,493	57.2
PROCESSED FRUIT & VEGETABLES	5,646	9.8
WINE & BEER	5,206	59.6
RED MEATS,FRESH/CHILLED/FROZEN	4,062	706.0
FRUIT & VEGETABLE JUICES	3,839	151.6
OTHER FISHERY PRODUCTS	3,526	1495.5
PET FOODS (DOG & CAT FOOD)	2,338	-30.6
EGGS & PRODUCTS	1,616	41.8
SNACK FOODS (EXCLUD. NUTS)	1,381	-21.8
SALMON	1,034	-12.2
MOLLUSCS	648	343.8
FRESH FRUIT	501	53.7
DAIRY PRODUCTS (EXCL. CHEESE)	208	-89.5
RED MEATS, PREPARED/PRESERVED	156	875.0
FRESH VEGETABLES	47	-80.3
CRUSTACEANS	36	-88.4
GROUNDFISH & FLATFISH	14	∞
NURSERY PRODUCTS & CUT FLOWERS	10	-95.8
CHEESE	8	∞
BREAKFAST CEREALS/PANCAKE MIX	4	-87.9
POULTRY MEAT	0	0.0
SURIMI	0	0.0

Source: Global Trade Atlas

Key Demographic Developments and Their Impact on Consumer Buying Habits

Austria has a population of 8.4 million (2011). The number of single households and childless double working partnerships is rising. From 2001 to 2011 there was an increase of 18 percent in single-person households. The number of single households reached 1.33 million in 2011. This corresponds to 36.4 percent of all households. In 2011, an average household consisted of 2.28 people. The median age of Austria's population is gradually rising. In 2011, 17.7 percent of the total population was over 65 years old. (Source: Statistik Austria)

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 was that Austrian consumers tended to buy lower-priced alternate products but this is changing again with the recovering economy. For special events most people, even in lower income brackets, 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 rich and based on meat, flour, and vegetables. Cakes and bakery products are important parts of the diet.

There is an increasing interest in healthy lifestyles, especially among younger consumers concerned about excess calories and healthy diets. The younger generation also appreciates trying new products and is a logical segment to aim for with many new food product introductions.

Biotech (also called 'GMO') 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 and food products is Austria's growing market for organic agricultural and food products. The market share of organics in food retail accounts for about 6 percent and Austria has the highest percentage of organic farms in the EU. In 2011, 7.4 percent of all fresh food purchases in Austria were organic.

Driven by the Austrian government and NGOs Austrian consumers are getting more and more aware of environmental issues. This creates a rapidly growing market for sustainably produced food products. Reacting to this trend retail chains started launching private labels promoting "sustainability". The REWE concern for example introduced the label "Pro Planet" where they claim to sell food products produced responsibly for the environment and the society. The discounter Hofer promotes improved carbon footprint for its organic products under the label "Zurueck zum Ursprung". Furthermore some retailers promote fair trade products.

An increasing awareness of allergies is also raising the demand for special allergy-related food products.

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.

The rise in single households also 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.

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; regional and sustainable products are highly promoted
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); 95 percent of Austrians fish and seafood consumption needs to be imported	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.

Organic food products developed from a niche market to significant market share. As of today, sales of organic products account for about 6 percent of retail sales. Economists believe that organic products may someday reach 10 percent of the total food market. “Similarly, there is significant interest in “sustainable” food products. Recently, almost all Austrian retail chains introduced their own voluntary “sustainability” strategies and labels to promote products with environmental, social and economic benefits. “Light” products are also on a rising trend; however, consumers do not seem to tolerate a loss in flavor as compared to “normal” products.

Beef and pork consumption has been somewhat declining in the last couple of years, whereas poultry consumption has been increasing. As a result of the financial crisis, consumers tend to buy less expensive meat cuts. Due to increasing health awareness fish consumption is on a rising trend. 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 over 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 - Austria:]

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 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.usda-eu.org/trade-with-the-eu/eu-import-rules/

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 when exposed to the larger EU market and many have merged with larger national or foreign firms. Apart from Spar (Internationale Spar Centrale BV), all leading food retailers in Austria are part of large German retailer groups. The top three retail chains have a remarkable 72 percent market share. In 2011, total sales of Austrian food retailers were at Euros 19.5 billion.

Sales Volume of Leading Austrian Food Retail Chains, Million Euros

Food Retail Chain	2007	2008	2009	2010	2011	2012*
Rewe Group	4,240.5	5,219.1	5,273.0	5,338.4	5,465.5	5,622.9
Internationale Spar Centrale BV	4,500.2	4,783.1	4,907.4	5,047.8	5,247.1	5,447.9
Aldi Group	3,150.0	3,300.0	3,350.0	3,278.0	3,245.2	3,207.9
Total Food Retail	18,050.6	18,966.7	19,152.2	19,254.4	19,507.4	19,826.1

* 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. There is also a strong confectionary and meat industry.

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 16.6 billion to Austria's GDP in 2011 (5.5 percent) and plays an important economic role. In 2011, 126 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 2011 in 1000 of U.S. $ *)	Austrian Imports from the U.S. 2011 in 1000 of U.S. $ *)	Market Attractiveness for USA
Fish and Seafood Products	459,680	5,258	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. In recent years the demand for frozen U.S. pollack filets has increased significantly.
Tree Nuts	120,821	13,493	In 2011, the United States was the second most important supplier of tree nuts by quantity 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	333,107	5,206	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 2011, the United States was the eighth 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	198,366	2,338	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.
Processed Fruits and Vegetables	770,049	5,646	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 Vegetable Juices	359,372	3,839	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)	804,699	1,381	The Austrian demand for healthy, organic, innovative, and exotic snacks continues to grow.
Red Meats Fresh/ Chilled/ Frozen	741,323	4,062	Limited but lucrative and increasing opportunities exist for U.S. hormone free high quality beef, game and exotic meat for the upper scale gastronomy.
Eggs & Products	89,650	1,616	The United States is Austria’s number one supplier of albumins and albumin derivates which are used in the food processing industry. In the last two years (2008

			to 2011) Austrian imports of this category from the United States increased by 90 percent.

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.usda-mideurope.com/

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

Wirtschaftskammer Oesterreich
(Austrian Economic Chamber)
Wiedner Hauptstr. 63
A-1045 Wien
Phone: + 43 (5) 90 900

Fax: +43 5 90 900 5678
Email: office@wko.at
Website: http://wko.at

Institut für Lebensmitteluntersuchung Wien
Spargelfeldstraße 191
1220 Wien
Phone: +43 505 55-35 107
Fax: +43 505 55-35 109
Website: http://www.ages.at/lebensmittel/ueber-uns/lebensmittel/ilmu-wien/

Institut für Lebensmitteluntersuchung Linz
Wieningerstraße 8
4020 Linz
Phone: +43 50555 41701
Fax: +43 50555 41709

Bundesanstalt fuer Lebensmitteluntersuchung Salzburg
Innsbrucker Bundesstraße 47
A-5020 Salzburg, Austria
Phone: +43 50555 44100
Fax: 43 50555 44109

Bundesanstalt fuer Lebensmitteluntersuchung Graz
Beethovenstr. 8
A-8010 Graz, Austria
Phone: +43 50555 61303
Fax: +43 50555 61309

Bundesanstalt fuer Lebensmitteluntersuchung Innsbruck
Technikerstr. 70
A-6020 Innsbruck, Austria
Phone: + 43 50 555 71222
Fax: + 43 50 555 71201

Lebensmitteluntersuchungsanstalt der Stadt Wien
Hennebergg. 3
A-1030 Wien, Austria
Phone: +43 (1) 4000 97955
Fax: +43 (1) 4000 9997955
Website: http://www.wien.gv.at/lebensmittel/index.html

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, Fish and Forestry Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2011	16,499/ 0.65%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2011	9,135/ 0.62%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2011	460/ 1.14%
Total Population (Millions)/Annual Growth Rate (%)[3)]/[2)]	2011	8.4/ 0.026%
Urban Population (%)/ Rate of Urbanization (%)[2)]	2010	68% / 0.6%
Number of Major Metropolitan Areas	2011	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)[2)]	2011	$41,600
Unemployment Rate (%)[2)]	2011	4.2%
Consumer Per Capita Food Expenditures (Incl. Beverages and Tobacco) (U.S. Dollars) [5)]	2011	$3,675
Percent of Female Population Employed (15 to 64 years old)[3)]	2011	66.5%
Average Exchange Rate 2010 (US$1 = 0.719 Euro) [4)]	2011	0.719

1) Source: Global Trade Atlas
2) Source: CIA World Factbook
3) Source: Statistik Austria
4) Source: OANDA
5) Source: Euromonitor

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		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
CONSUMER-ORIENTED AGRICULTURAL TOTAL	7,991	8,022	9,135	48.6	44.7	56.3	0.61	0.56	0.62
SNACK FOODS (EXCLUD. NUTS)	742	725	805	1.9	1.6	1.4	0.26	0.21	0.17
BREAKFAST CEREALS/PANCAKE MIX	63	58	69	0.1	0.0	0.0	0.17	0.07	0.01
RED MEATS,FRESH/CHILLED/FROZEN	646	625	741	1.6	1.8	4.1	0.25	0.29	0.55
RED MEATS, PREPARED/PRESERVED	273	275	334	0.0	0.0	0.2	0.01	0.02	0.05
POULTRY MEAT	296	307	357	0.0	0.0	0.0	0.00	0.00	0.00
DAIRY PRODUCTS (EXCL. CHEESE)	395	395	447	0.0	0.2	0.2	0.00	0.05	0.05
CHEESE	414	419	489	0.0	0.0	0.0	0.00	0.00	0.00
EGGS & PRODUCTS	90	86	90	1.9	1.6	1.6	2.14	1.86	1.80
FRESH FRUIT	650	684	702	0.4	0.5	0.5	0.06	0.07	0.07
FRESH VEGETABLES	468	547	532	0.1	0.0	0.0	0.02	0.01	0.01
PROCESSED FRUIT & VEGETABLES	670	680	770	7.3	5.2	5.6	1.10	0.76	0.73
FRUIT & VEGETABLE JUICES	256	298	359	2.1	2.3	3.8	0.82	0.76	1.07
TREE NUTS	81	95	121	10.4	9.4	13.5	12.92	9.86	11.17
WINE & BEER	300	298	333	4.5	3.1	5.2	1.50	1.02	1.56
NURSERY PRODUCTS & CUT FLOWERS	430	439	485	0.3	0.0	0.0	0.06	0.01	0.00
PET FOODS (DOG & CAT FOOD)	168	166	198	3.9	2.9	2.3	2.30	1.76	1.18
OTHER CONSUMER ORIENTED PRODUC	2,052	1,924	2,304	14.0	16.1	17.8	0.68	0.84	0.77
FISH AND SEAFOOD PRODUCTS TOTAL	404	397	460	2.3	2.4	5.3	0.56	0.60	1.14
SALMON	48	54	60	0.7	0.4	1.0	1.49	0.75	1.73
SURIMI	0	0	0	0.0	0.0	0.0	0.00	0.00	0.00
CRUSTACEANS	52	56	60	0.1	0.1	0.0	0.25	0.21	0.06
GROUNDFISH & FLATFISH	14	14	13	0.0	0.0	0.0	0.00	0.11	0.10
MOLLUSCS	13	13	15	0.1	0.5	0.6	1.06	3.65	4.20
OTHER FISHERY PRODUCTS	277	261	311	1.3	1.4	3.5	0.47	0.52	1.13
AGRICULTURAL PRODUCT TOTAL	10,644	10,891	12,864	77.9	63.3	85.0	0.73	0.58	0.66
AGRICULTURAL, FISH & FORESTRY TOTAL	13,609	14,027	16,499	92.3	80.7	107.0	0.68	0.58	0.65

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	2009	2010	2011
Germany	3,408	3,380	3,829
Italy	969	1,026	1,156
Netherlands	679	681	728
Switzerland	319	310	362
Hungary	281	291	342
France	275	262	339
Spain	303	307	325
Poland	218	219	264
Belgium	159	159	177
Turkey	112	128	129
Czech Republic	105	88	106
Brazil	72	79	88
China	58	72	83
United Kingdom	57	56	80
Denmark	58	61	77
World	7,991	8,022	9,135

Source: Global Trade Atlas

Fish & Seafood Products (In Millions of U.S. Dollars)			
Top 15 Supplier	2008	2009	2010
Germany	159.2	171.2	156.1
Netherlands	43.6	37.8	51.9
Norway	15.2	23.2	28.5
Denmark	26.2	23.7	24.2
Italy	23.4	20.5	21.5
Vietnam	12.2	12.9	19.5
Poland	9.1	5.5	16.0
France	13.6	12.9	13.5
Thailand	10.0	7.6	13.5
Slovenia	4.5	4.4	8.4
China	5.6	5.6	8.2
Mauritius	3.1	4.1	6.7
Kazakhstan	4.3	4.9	6.3
United Kingdom	3.2	3.3	6.2
Bangladesh	4.9	5.2	6.2
World	403.9	397.2	459.7

Source: Global Trade Atlas

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