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Austria

Exporter Guide

Roadmap to the Austrian Market

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Report Highlights:
Consumer-oriented food and beverage products remain the most important agricultural import category from the United States. In 2015, the consumer-oriented sector accounted for about 56 percent of total agricultural, fish and forestry imports from the United States, worth $68 million USD. Austrian consumer trends are creating good market opportunities for organic, health, diet, convenience, and 'sustainable' food products. Market opportunities for U.S. products include fish and seafood products, nuts, wine, bourbon, pet foods, dried fruits, fruit juices, snack foods, and high quality beef.

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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 European Union (EU) economies, especially Germany's. Austria is a part of the EU single market and customs union and is 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. Austria has one of the highest gross domestic products (GDP) per capita in the entire EU. Following a period of sluggish economic activity from 2012 to 2015, the Austrian Institute of Economic Research (WIFO) forecasts the Austrian economic growth to pick up to an annual rate of 1.5 percent over the next five years. In 2016, total production in Austria is expected to grow in real terms by 1.6 percent, significantly above the pace recorded for the last four years. For the first time in three years, private households are spending considerably more on consumption in real terms. As a result of higher disposable income due to the income tax reform and a growing population, including an increasing number of refugees seeking asylum, private consumption is projected to gain momentum. However, unemployment will keep rising due to increasing number of people seeking domestic and foreign employment. The Austrian unemployment rate in 2015 was at 5.7 percent, which is considerably lower than the EU average. At the same time, the Austrian inflation rate was at a low of 0.8 percent, which exceeded the even lower EU average. (Sources: Statistik Austria and WIFO)

Austrian consumer expenditures have grown slowly; however, with the exception of 2015, Austrians are spending more in recent years and food and beverage sales have benefited. From 2012 to 2015, consumer expenditures on food and beverages (including alcoholic beverages and tobacco) grew 3.3 percent to Euro 2,787 per capita. In 2015, Austrian consumer expenditures on food and beverages (non-alcoholic and alcoholic including tobacco) accounted for 13.3 percent of total consumer expenditures. The share of food and beverage expenditures remained fairly stable over the years. (Source: Euromonitor)

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

Consumer Expenditures	2012	2013	2014	2015	2016*	2017*
Consumer expenditures	20,335	20,667	20,867	20,100	21,206	21,652
Consumer expenditures on food and non-alcoholic beverages	2,013	2,061	2,048	2,080	2,103	2,148
Consumer expenditures on alcoholic beverages and tobacco	684	688	699	707	717	734

* 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 2015, the consumer oriented sector accounted for 55.6 percent of total agricultural, fish and forestry imports from the United States, valued at $ 67.6 million (source: Global Trade Atlas). During the same period, fish and seafood imports from the United States were at $ 1.6 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 considerably larger.

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

Product Category	Value, Thousands of $ in 2015	Growth 2011 - 2015 in %
OTHER CONSUMER ORIENTED PRODUCT	22,181	24.9
TREE NUTS	21,885	62.2
RED MEATS,FRESH/CHILLED/FROZEN	6,838	68.3
PROCESSED FRUIT & VEGETABLES	5,367	-4.9
WINE & BEER	4,756	-8.6
FRUIT & VEGETABLE JUICES	3,363	-12.4
FRESH FRUIT	854	70.5
SNACK FOODS (EXCLUD. NUTS)	713	-48.4
OTHER FISHERY PRODUCTS	650	-81.6
EGGS & PRODUCTS	506	-68.7
SALMON	438	-57.6
RED MEATS, PREPARED/PRESERVED	408	161.5
PET FOODS (DOG & CAT FOOD)	354	-84.9
MOLLUSCS	320	-50.6
DAIRY PRODUCTS (EXCL. CHEESE)	237	13.9
CRUSTACEANS	153	325.0
FRESH VEGETABLES	105	123.4
CHEESE	53	562.5
BREAKFAST CEREALS/PANCAKE MIX	17	325.0
GROUNDFISH & FLATFISH	16	14.3
NURSERY PRODUCTS & CUT FLOWERS	5	-50.0
POULTRY MEAT	1	n/a
SURIMI	0	n/a

Source: Global Trade Atlas

Key Demographic Developments and Their Impact on Consumer Buying Habits

Austria has a population of 8.6 million (2015). The number of single households that are childless with both partners working outside the home is rising. From 2000 to 2015, there was an increase of 45.1 percent in single-person households. The number of single households reached 1.4 million in 2015, which corresponds to 37 percent of all households. In 2015, an average household consisted of 2.22 people. The median age of Austria's population is gradually rising. On January 1, 2016, 18.4 percent of the total population was 65 years and older. (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. However, 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. Since the population is steadily becoming older, the 50+ generation is an important target market for food products considering their specific needs.

Biotech (also called 'GMO') food 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. Austrian retailers even promote biotech free food. There are two Austrian labels for biotech free products issued by "ARGE Gentechnik-frei" (Platform for 'GMO-Free' Food Products – in German) which follows the requirements for biotech-free food products laid down by the Austrian food codex. One label states "produced biotech-free" (gentechnikfrei erzeugt); the second label says "produced without biotech" (ohne Gentechnik hergestellt). Major products are milk and dairy products (cows must not be fed by GE feed), bread and bakery products, eggs (laying hens must not be fed by biotech feed), soybean products, meat, fruits and vegetables.

A counterpoint to the negative view of biotech foods is Austria's strong and still growing market for organic agricultural and food products. The market share of organics in food retail accounts for about 7 percent and Austria has the highest percentage of organic farms within the EU. In 2015, 7 percent of all fresh food purchases in Austria were organic.

Driven by the Austrian government and non-governmental organizations (NGOs), Austrian consumers are highly aware of environmental issues. This creates a rapidly growing market for sustainably produced food products. In reaction to this trend, retail chains started launching private labels promoting the "sustainability" of their products. The REWE retail chain, for example, introduced the "Pro Planet" brand that claims to offer food products that are produced in an environmentally and social responsible way. The discounter Hofer promotes its improved carbon footprint for organic products sold 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 such as gluten-free and lactose free.

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. The latest food trends stress a traditional diet prepared in more modern ways using high quality products and ingredients.

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 have developed from a niche market to having a significant market share. As of today, sales of organic products account for about 7 percent of retail sales. Industry watchers 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 slack economy, 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 also applies 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 the latest Food and Agricultural Import Regulations and Standards (FAIRS) GAIN report – Austria, which can be found on the USDA GAIN database:
http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx

General Import and Inspection Procedures

Incoming goods go either to the customs storage 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 66 percent market share (2015). In 2015, total sales of Austrian food retailers were at Euros 23.2 billion (Source: Euromonitor).

Sales Volume of Leading Austrian Food Retail Chains, Million Euros

Food Retail Chain	2010	2011	2012	2013	2014	2015*
Rewe Group	5,367	5,222	5,408	5,627	5,661	5,733
Internationale Spar Centrale BV	5,047	5,247	5,338	5,554	5,604	5,700
Aldi Group	3,300	3,310	3,400	3,600	3,730	3,881
Total Food Retail	21,882	21,854	22,364	22,705	22,856	23,150

* 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 addition more and more retailers advertise their products and sales in the internet and have their regular email-newsletters. In-store promotions can also be very successful.

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

Tourism contributed about Euro 15.7 billion to Austria's GDP (Gross Domestic Product) in 2015 (4.6 percent of GDP) and plays an important economic role. In 2015, some 135 million overnight stays by tourists were logged. The major share of tourists comes from Germany followed by The 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.

In recent years some food retailers started food internet sales but internet sales for food products still remain marginally.

IV. Best High-Value Product Prospects

Consumer oriented and fishery products offering good U.S. export opportunities are:

Product Category	Total Austrian Imports 2014 in 1000 of U.S. $ *)	Austrian Imports from the U.S. 2014 in 1000 of U.S. $ *)	Market Attractiveness for USA
Fish and Seafood Products	459,951	1,577	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	171,473	21,885	In 2015, the United States was the second largest supplier of tree nuts (in value and 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	217,548	4,748	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 2015, the United States was the fifth most important supplier (by value) of wine to Austria. U.S. wine sales increased in retail stores including discounters who mainly carry inexpensive U.S. wines.
Pet Foods	354,561	353,697	Since the 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	819,335	5,367	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	284,604	3,363	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)	810,942	713	The Austrian demand for healthy, organic, innovative, and exotic snacks continues to grow.

Product Category	Total Austrian Imports 2014 in 1000 of U.S. $ *)	Austrian Imports from the U.S. 2014 in 1000 of U.S. $ *)	Market Attractiveness for USA
Red Meats Fresh/ Chilled/ Frozen	599,216	6,838	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	80,401	506	In 2015, the United States was Austria's number four supplier of albumins and albumin derivates which are used in the food processing industry.
Whiskies (Bourbon)	35,750	11,400	When it comes to hard liquor Austrian traditionally drink Schnapps but there is also a good market for Whiskeys. The United States is the second largest supplier, after the United Kingdom.

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. 2293
Email: agvienna@fas.usda.gov
Website: http://www.usda-mideurope.com/

Bundesministerium fuer Wissenschaft, Forschung und Wirtschaft
(Federal Ministry of Science, Research and Economy)
Stubenring 1
A-1011 Wien
Phone: + 43 (1) 71100 – 0
Email: service@bmwfj.gv.at
Website: http://www.bmwfw.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.bmlfuw.gv.at/

Bundesministerium für Gesundheit
(Federal Ministry of Health)
Radetzkystraße 2
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Website: http://www.bmgf.gv.at/

Agrarmarkt Austria (AMA)
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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
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Fax: +43 5 90 900 5678
Email: office@wko.at
Website: https://www.wko.at

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/

Lebensmitteluntersuchungsanstalten der Laender (Food Safety Institutes of the Austrian federal states):
https://www.verbrauchergesundheit.gv.at/lebensmittel/lebensmittelkontrolle/LM_Kontrolle_LMUAS_adressen_agentur.pdf?5i80fz

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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

Appendix I

Table A. Key Trade and Demographic Information

AUSTRIA

KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural, Fish and Forestry Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2015	14,987 / 0.81%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2015	8,798 / 0.77%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2015	460 / 0.34%
Total Population (Millions)/Annual Growth Rate (%)[3)]	2015	8.6 / 1.0%
Urban Population (%)/ Rate of Urbanization (%)[2)]	2015	66% / 0.4%
Number of Major Metropolitan Areas	2016	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)[2)]	2015	$47,000
Unemployment Rate (%)[3)]	2015	5.7%
Consumer Per Capita Food Expenditures (Incl. Beverages and Tobacco) (U.S. Dollars)[5)]	2015	$3,093
Percent of Female Population Employed (15 to 64 years old)[3)]	2015	67.1%
Average Exchange Rate 2015 (US$1 = 0.901 Euro)[4)]	2015	0.901

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		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
CONSUMER-ORIENTED AGRICULTURAL TOTAL	9,737	10,135	8,798	69.1	70.0	67.6	0.71	0.69	0.77
SNACK FOODS (EXCLUD. NUTS)	897	939	811	1.3	1.0	0.7	0.14	0.11	0.09
BREAKFAST CEREALS/PANCAKE MIX	70	76	67	0.0	0.0	0.0	0.02	0.04	0.03
RED MEATS,FRESH/CHILLED/FROZEN	722	789	599	8.1	7.8	6.8	1.12	0.98	1.14
RED MEATS, PREPARED/PRESERVED	361	378	318	0.5	0.1	0.4	0.12	0.01	0.13
POULTRY MEAT	368	388	323	0.0	0.0	0.0	0.01	0.00	0.00
DAIRY PRODUCTS (EXCL. CHEESE)	458	490	402	0.2	0.2	0.2	0.04	0.04	0.06
CHEESE	527	595	459	0.0	0.0	0.1	0.00	0.01	0.01
EGGS & PRODUCTS	94	90	80	1.7	1.6	0.5	1.79	1.81	0.63
FRESH FRUIT	789	752	745	0.7	0.8	0.9	0.09	0.10	0.11
FRESH VEGETABLES	544	537	505	0.1	0.1	0.1	0.01	0.01	0.02
PROCESSED FRUIT & VEGETABLES	794	850	819	5.0	5.7	5.4	0.62	0.67	0.66
FRUIT & VEGETABLE JUICES	373	333	285	3.3	4.9	3.4	0.90	1.47	1.18
TREE NUTS	137	171	171	14.7	17.8	21.9	10.73	10.45	12.76
WINE & BEER	361	354	286	5.1	5.1	4.8	1.40	1.45	1.66
NURSERY PRODUCTS & CUT FLOWERS	462	480	398	0.0	0.0	0.0	0.00	0.00	0.00
PET FOODS (DOG & CAT FOOD)	369	400	355	1.9	1.8	0.4	0.51	0.46	0.10
OTHER CONSUMER ORIENTED PRODUC	2,410	2,514	2,173	26.7	23.0	22.2	1.11	0.92	1.02

FISH AND SEAFOOD PRODUCTS TOTAL	512	527	460	2.0	1.9	1.6	0.38	0.36	0.34
SALMON	75	85	75	0.1	0.1	0.4	0.08	0.11	0.58
SURIMI	0	0	0	0.0	0.0	0.0	0.00	0.00	0.00
CRUSTACEANS	66	77	73	0.2	0.1	0.2	0.31	0.18	0.21
GROUNDFISH & FLATFISH	16	17	11	0.0	0.0	0.0	0.16	0.08	0.14
MOLLUSCS	15	16	14	0.7	0.6	0.3	4.59	3.38	2.27
OTHER FISHERY PRODUCTS	339	331	287	1.0	1.1	0.7	0.28	0.33	0.23

AGRICULTURAL PRODUCT TOTAL	13,427	13,706	11,900	108.3	104.1	109.6	0.81	0.76	0.92
AGRICULTURAL, FISH & FORESTRY TOTAL	17,166	17,345	14,987	123.4	116.6	121.8	0.72	0.67	0.81

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	2013	2014	2015
Germany	3,035	3,168	3,169
Italy	904	888	930
Netherlands	533	561	570
Switzerland	339	363	368
Spain	289	294	336
Hungary	292	324	296
France	272	283	268
Poland	196	200	230
Turkey	135	157	221
Belgium	144	145	143
Czech Republic	84	102	97
United Kingdom	67	72	83
Brazil	66	65	75
Greece	58	64	71
Serbia	47	56	71
World	7,325	7,635	7,932

Source: Global Trade Atlas

Fish & Seafood Products (In Millions of U.S. Dollars)			
Top 15 Suppliers	2013	2014	2015
Germany	132.1	138.2	137.9
Netherlands	34.2	36.0	41.8
Norway	23.4	29.9	30.3
Poland	15.3	17.7	23.6
Denmark	19.1	19.7	22.7
Italy	19.5	21.6	22.4
Vietnam	15.4	15.1	20.6
France	10.9	12.6	14.8
Spain	7.6	10.3	10.5
India	4.5	6.2	7.8
Slovenia	12.5	7.8	7.0
Thailand	15.5	10.6	6.6
China	5.8	5.6	5.9
Kazakhstan	3.2	4.1	5.1
Morocco	5.0	4.3	3.9
World	384.3	397.6	415.1

Source: Global Trade Atlas

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GAIN Reports

New EU Rules for Sports Food|FAIRS Subject Report|Brussels USEU|EU-28|7/19/2016

On July 20, 2016, the EU's new "Food for Specific Groups" (FSG) regulation 609/2013 becomes applicable. In June 2016, the European Commission presented a report evaluating the necessity to include specific provisions on sports food in the FSG regulation and concluded there is not. This report provides an overview of the horizontal food EU food rules that will be applicable to sports food after July 20, 2016.
New EU Rules for Sports Food_Brussels USEU_EU-28_7-13-2016

Increased Certification for Highly Processed Products|FAIRS Subject Report Sanitary/Phytosanitary/Food Safety|Brussels USEU|EU-28|4/15/2016

The European Commission is putting in place additional updates and guidance to its food hygiene legislation which will increase the number of highly-processed products of animal origin that require certification of animal and public health guarantees and must undergo veterinary inspection upon entry in the European Union (EU).
Increased Certification for Highly Processed Products_Brussels USEU_EU-28_4-11-2016

New EU Rules on Dietetic Foods - Update|FAIRS Subject Report Product Brief|Brussels USEU|EU-28|2/12/2016

The EU's new Dietetic Foods Regulation 609/2013, adopted in June 2013, becomes applicable on July 20, 2016. Regulation 609/2013 required the European Commission to adopt a number of delegated acts setting out specific compositional and labeling requirements. This report provides an overview of the new EU requirements.
New EU Rules on Dietetic Foods - Update_Brussels USEU_EU-28_2-8-2016

FAIRS Export Certificate Report|Food and Agricultural Import Regulations and Standards - Certification|Brussels USEU|EU-28|2/11/2016

This guide provides an overview of export health certificates needed for exporting plants, animals, foods and other animal origin products to the European Union. U.S. regulatory agencies have been informed of the wide range of certificates changes that have occurred in the past months and have updated their export manuals to reflect those changes. Sections updated: All sections.
Food and Agricultural Import Regulations and Standards - Certification_Brussels USEU_EU-28_12-24-2015

FAIRS Country Report|Food and Agricultural Import Regulations and Standards - Narrative|Vienna|Austria|1/8/2016

This report outlines specific requirements for food and agricultural products imports into Austria. Austria as a member of the European Union follows the EU directives and regulations. It is recommended that this report be read in conjunction with the EU Food and Agricultural Import Regulations and Standards.
Food and Agricultural Import Regulations and Standards - Narrative_Vienna_Austria_12-16-2015

New EU Novel Foods Regulation Adopted|FAIRS Subject Report Trade Policy Monitoring|Brussels USEU|EU-28|1/7/2016

A new EU Regulation on Novel Foods was adopted in November 2015 and published in Official Journal L 327 on December 11, 2015. Most provisions of the new Novel Foods Regulation will apply from January 1, 2018. This report provides an overview of the main elements of the Novel Foods Regulation.
New EU Novel Foods Regulation Adopted_Brussels USEU_EU-28_12-22-2015

Road Map to Austrian Market|Exporter Guide|Vienna|Austria|1/4/2016

Consumer-oriented food and beverage products remain the most important agricultural import category from the United States. In 2014, the consumer-oriented sector accounted for 60 percent of total agricultural, fish and forestry imports from the United States, worth $ 70 million. Austrian consumer trends are creating good market opportunities for organic, health, diet, convenience, and 'sustainable' food products. Market opportunities for U.S. products include fish and seafood products, nuts, ...
Exporter Guide_Vienna_Austria_12-18-2015

FAIRS Country Report|Food and Agricultural Import Regulations and Standards - Narrative|Brussels USEU|EU-28|12/22/2015

This report provides an overview of EU food and feed legislation currently in force. All sections of the report were updated but special attention should be given to EU's new novel food rules (Section VI) which will become applicable on January 1, 2018. For updates on developments in EU food and feed legislation check the FAS/USEU website www.usda-eu.org.
Food and Agricultural Import Regulations and Standards - Narrative_Brussels USEU_EU-28_12-14-2015

FAIRS Export Certificate Report|Food and Agricultural Import Regulations and Standards - Certification|Vienna|Austria|12/14/2015

This report covers only specific export certificate requirements by Austria, which are different from EU requirements.
Food and Agricultural Import Regulations and Standards - Certification_Vienna_Austria_10-20-2015

Plenty of opportunities for U.S. organics in the EU market|Beverages Coffee Dried Fruit Citrus Fresh Fruit Special Certification - Organic/Kosher/Halal Market Development Reports Product Brief Tree Nuts|The Hague|EU-28|2/11/2015

The organic arrangement between the U.S. and the EU in combination with growing demand for organic products in the EU creates opportunities for U.S. companies. Export opportunities are to be found in fresh produce, dried fruit and nuts, specialty grains and processed products.
Plenty of opportunities for U.S. organics in the EU market_The Hague_EU-28_2-10-2015

FAIRS Export Certificate Report|Food and Agricultural Import Regulations and Standards - Certification|Vienna|Austria|1/8/2015

This report covers only specific export certificate requirements by Austria, which are different from EU requirements.
Food and Agricultural Import Regulations and Standards - Certification_Vienna_Austria_12-10-2014

FAIRS Country Report|Food and Agricultural Import Regulations and Standards - Narrative|Brussels USEU|EU-28|1/2/2015

This report provides an overview of EU food and feed legislation currently in force. All sections were updated but special attention should be given to Section V on the EU's new food labeling rules which became applicable on December 13, 2014. For updates on developments in EU food and feed legislation check the FAS/USEU website www.usda-eu.org.
Food and Agricultural Import Regulations and Standards - Narrative_Brussels USEU_EU-28_12-30-2014