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Austria

Exporter Guide

2017

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Report Highlights:
Consumer-oriented food and beverage products remain the most important agricultural import category from the United States. In 2016, the consumer-oriented sector accounted for about 52 percent of total agricultural, fish and forestry imports from the United States, worth $65.6 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 has 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 Statistics Institute (Statistik Austria) reports a 1.5 percent growth of the Austrian economy in 2016 and the Institute of Economic Research (WIFO) expects a 2.8 percent GDP growth in 2017, which is the highest rate in six years. WIFO forecasts the same growth rate for the Austrian economy as 2017. The current upswing is supported by the manufacturing industry, the construction industry, trade and business related services. The tourism sector also benefits from lively economic activity in Austria and abroad.

As a result of higher disposable income due to the income tax reform and a low unemployment rate, a growing population, including an increasing number of migrants including refugees seeking asylum, private consumption is projected to remain high and grow even further. The Austrian unemployment rate in 2017 is expected at 5.6 percent (according to Eurostat definition), which is considerably lower than the EU average. In 2016, the Austrian inflation rate was at almost 1 percent, and increased in 2017 slightly over 2 percent which is high by EU standards. As a result of the stronger economic activity government accounts also see a relief through higher tax revenues. (Sources: Statistik Austria and WIFO)

Food and beverage sales benefit from increasing total consumer expenditures. In 2017, consumer expenditures on food and beverages (including alcoholic beverages and tobacco) are estimated at $3,155.7 per capita. In 2016, Austrian consumer expenditures on food and beverages (non-alcoholic and alcoholic including tobacco) accounted for 12.9 percent of total consumer expenditures. The share of food and beverage expenditures remains fairly stable (about 13 percent) over the years. (Source: Euromonitor)

Consumer Expenditures Austria in $USD Per Capita - Value at Current Prices

Consumer Expenditures	2013	2014	2015	2016	2017*	2018*
Consumer expenditures	22,540.2	22,927.7	23,277.2	23,615.0	23,911.0	24,501.6
Consumer expenditures on food and non-alcoholic beverages	2,231.4	2,298.2	2,316.0	2,328.4	2,299.1	2,342.9
Consumer expenditures on alcoholic beverages and tobacco	758.4	763.1	794.1	801.5	791.0	812.8

* 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 2016, the consumer oriented sector accounted for 51.7 percent of total agricultural, fish and forestry imports from the United States, valued at $65.6 million (source: Global Trade Atlas). During the same period, fish and seafood imports from the United States were at $3.7 million. Official import numbers do not include significant 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 $USD in 2016	Growth 2012 - 2016 in %
OTHER CONSUMER ORIENTED PRODUCTS*)	23,427	26.22
TREE NUTS	16,774	61.74
PROCESSED FRUIT & VEGETABLES	8,501	62.98
RED MEATS,FRESH/CHILLED/FROZEN	5,405	-17.74
WINE & BEER	4,925	2.43
FRUIT & VEGETABLE JUICES	2,544	-36.78
SALMON	1,711	855.87
OTHER FISHERY PRODUCTS	1,469	31.51
SNACK FOODS (EXCLUD. NUTS)	1,066	-19.67
FRESH FRUIT	890	3.25
DAIRY PRODUCTS (EXCL. CHEESE) **)	743	2,462.07
MOLLUSCS	363	-19.51
CHEESE	319	n/a
PET FOODS (DOG & CAT FOOD)	302	-85.96
EGGS & PRODUCTS	258	-88.37
RED MEATS, PREPARED/PRESERVED	210	-4.55
FRESH VEGETABLES	204	148.78
CRUSTACEANS	139	-11.46
BREAKFAST CEREALS/PANCAKE MIX	34	70.00
GROUNDFISH & FLATFISH	9	-86.57
NURSERY PRODUCTS & CUT FLOWERS	3	-84.21
POULTRY MEAT	0	n/a
SURIMI	0	n/a

*) Major categories are "Food Preparations Nesoi (Not Elsewhere Specified or Indicated)"; "Sauces Etc. Mixed Condiments And Seasonings Nesoi"; "Enzymes And Prepared Enzymes, Nesoi"; Coffee, Roasted, Not Decaffeinated".

**) Most important category in 2016: "Milk And Cream Of A Fat Content, By Weight, Exceeding 10%, Not Concentrated Nor Containing Added Sugar Or Other Sweetening Matter"

Source: Global Trade Atlas

Key Demographic Developments and Their Impact on Consumer Buying Habits

Austria has a population of 8.7 million (2016). The number of single households and households with couples that are childless and both partners working outside the home is rising. From 2000 to 2016, there was an increase of 46.2 percent in single-person households. The number of single households was over 1.4 million in 2016, which corresponds to 37 percent of all households. In 2016, an average household consisted of 2.22 people. The median age of Austria's population is gradually rising. In 2016, 18.5 percent of the total population was 65 years and older. Statistik Austria projects a population growth of 9 percent until 2040 (9.6 million people). This population growth will be accompanied by aging and an increase of the foreign born population. (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 to middle aged 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, including health foods.

Biotech, genetically engineered (GE) or '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 is an Austrian label 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. The label states "produced without biotech" (*ohne Gentechnik hergestellt*). Major products are milk and dairy products (cows must not be fed GE feed), bread and bakery products, eggs (laying hens must not be fed 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 farm land within the EU. Thus, opportunities exist for U.S. organic companies and exporters interested in the Austrian market.

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. There is also trend towards vegetarian and vegan diet.

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, an increasing number of people especially younger ones appreciate 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 seven percent of retail sales. Industry watchers believe that organic products may someday reach ten 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 poultry meat is considered to be more healthy. Fish consumption is also on a rising trend due to the health aspect. Cheese consumption, which is already high, continues to remain high. 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.

As a member of the European Union, EU import rules fully apply to Austria. 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 68 percent market share (2016). In 2016, total sales of Austrian food retailers were at $26.7 billion (Source: Euromonitor).

Sales Volume of Leading Austrian Food Retail Chains, Million $USD

Food Retail Chain	2011	2012	2013	2014	2015	2016
Rewe Group	6,010.95	6,221.64	6,473.83	6,559.26	6,718.93	6,969.68
Internationale Spar Centrale BV	5,658.40	5,756.34	5,981.52	6,047.80	6,238.24	6,488.55
Aldi Group	3,662.72	3,762.31	3,983.62	4,127.48	4,373.91	4,658.40
Total Food Retail	24,435.10	24,989.82	25,363.62	25,596.66	26,217.00	26,685.29

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 large supermarket chains have regular TV spots. Supermarket, hypermarket and discounter chains have their own weekly or bi-weekly flyers in which available products 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 $21.8 billion to Austria's GDP in 2016 (5.6 percent of GDP) and plays an important economic role. In 2016, 141 million overnight stays by tourists were logged. The by far major share of tourists comes from Germany followed by The Netherlands. Almost 90 percent of the tourists visiting Austria come from EU countries. The main Austrian tourist areas are the western and southern alpine regions and the capitals of the federal states. (Source: Statistik Austria)

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 which are increasing but internet sales for food products still remain at a low level. However, internet orders of food deliveries from restaurants enjoy growing popularity.

IV. Best High-Value Product Prospects

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

Product Category	Total Austrian Imports 2016 in 1000 of $USD *)	Austrian Imports from the U.S. 2016 in 1000 of $USD *)	Market Attractiveness for USA
Fish and Seafood Products	517,982	3,691	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. From 2015 to 2016 fish imports from the USA increased by 134 percent. 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	149,470	16,774	In 2016, the United States was the third 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	228,261	4,911	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 2016, 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	636,016	302	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	790,288	8,501	Austrian imports of processed fruits and vegetables are mainly prepared nuts/seeds and dried fruits. 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	292,669	2,544	A very strong fruit juice industry makes Austria one of the most important juice importers worldwide. The demand for fruit juices is high. Good opportunities for U.S. fruit juices in the Austrian market are citrus and cranberry juices.
Snack Foods	837,481	1,066	The Austrian demand for healthy, organic, innovative, and exotic snacks is on a high level.

(Excl. Nuts)			

Product Category	Total Austrian Imports 2016 in 1000 of $USD *)	Austrian Imports from the U.S. 2016 in 1000 of $USD *)	Market Attractiveness for USA
Red Meats Fresh/ Chilled/ Frozen	638,485	5,405	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	74,329	258	In 2016, the United States was Austria's number four supplier of albumins and albumin derivates which are used in the food processing industry.
Whiskies (Bourbon)	37,784	10,329	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://fas-europe.org/

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 und Frauen
(Federal Ministry of Health and Women Affairs)
Radetzkystraße 2
1030 Wien
Tel. +43-1/711 00-0
Fax +43-1/711 00-14300
Website: http://www.bmgf.gv.at/

Agrarmarkt Austria (AMA)
(Agricultural Market Austria)
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A-1200 Wien
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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: https://www.wko.at

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

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Bundesanstalt fuer Lebensmitteluntersuchung Innsbruck
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Lebensmitteluntersuchungsanstalt der Stadt Wien
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Appendix I

Table A. Key Trade and Demographic Information

AUSTRIA

KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural, Fish and Forestry Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2016	15,404 / 0.82%
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2016	9,054 / 0.72%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2016	518 / 0.71%
Total Population (Millions)/Annual Growth Rate (%)[3)]	2016	8.7 / 1.3%
Urban Population (%)/ Rate of Urbanization (%)[2)]	2017	66.1% / 0.51%
Number of Major Metropolitan Areas	2017	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)[2)]	2016	$47,700
Unemployment Rate (%)[3)]	2017	5.6%
Consumer Per Capita Food Expenditures (Incl. Beverages and Tobacco) (U.S. Dollars) [5)]	2016	$3,090
Percent of Female Population Employed (15 to 64 years old)[3)]	2016	67.7%
Average Exchange Rate 2016 (US$1 = 0.9037 Euro) [4)]	2016	0.9037

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		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
CONSUMER-ORIENTED AGRICULTURAL TOTAL	10,135	8,798	9,054	70.0	67.6	65.6	0.69	0.77	0.72
SNACK FOODS (EXCLUD. NUTS)	939	811	837	1.0	0.7	1.1	0.11	0.09	0.13
BREAKFAST CEREALS/PANCAKE MIX	76	67	75	0.0	0.0	0.0	0.04	0.03	0.05
RED MEATS,FRESH/CHILLED/FROZEN	789	599	638	7.8	6.8	5.4	0.98	1.14	0.85
RED MEATS, PREPARED/PRESERVED	378	318	322	0.1	0.4	0.2	0.01	0.13	0.07
POULTRY MEAT	388	323	326	0.0	0.0	0.0	0.00	0.00	0.00
DAIRY PRODUCTS (EXCL. CHEESE)	490	402	415	0.2	0.2	0.7	0.04	0.06	0.18
CHEESE	595	459	462	0.0	0.1	0.3	0.01	0.01	0.07
EGGS & PRODUCTS	90	80	74	1.6	0.5	0.3	1.81	0.63	0.35
FRESH FRUIT	752	745	842	0.8	0.9	0.9	0.10	0.11	0.11
FRESH VEGETABLES	537	505	520	0.1	0.1	0.2	0.01	0.02	0.04
PROCESSED FRUIT & VEGETABLES	850	819	790	5.7	5.4	8.5	0.67	0.66	1.08
FRUIT & VEGETABLE JUICES	333	285	293	4.9	3.4	2.5	1.47	1.18	0.87
TREE NUTS	171	171	149	17.8	21.9	16.8	10.45	12.76	11.22
WINE & BEER	354	286	312	5.1	4.8	4.9	1.45	1.66	1.58
NURSERY PRODUCTS & CUT FLOWERS	480	398	359	0.0	0.0	0.0	0.00	0.00	0.00
PET FOODS (DOG & CAT FOOD)	400	355	336	1.8	0.4	0.3	0.46	0.10	0.09
OTHER CONSUMER ORIENTED PRODUC	2,514	2,173	2,301	23.0	22.2	23.4	0.92	1.02	1.02
FISH AND SEAFOOD PRODUCTS TOTAL	527	460	518	1.9	1.6	3.7	0.36	0.34	0.71
SALMON	85	75	87	0.1	0.4	1.7	0.11	0.58	1.97
SURIMI	0	0	0	0.0	0.0	0.0	0.00	0.00	0.00
CRUSTACEANS	77	73	75	0.1	0.2	0.1	0.18	0.21	0.18
GROUNDFISH & FLATFISH	17	11	12	0.0	0.0	0.0	0.08	0.14	0.07
MOLLUSCS	16	14	16	0.6	0.3	0.4	3.38	2.27	2.26
OTHER FISHERY PRODUCTS	331	287	328	1.1	0.7	1.5	0.33	0.23	0.45

AGRICULTURAL PRODUCT TOTAL	13,706	11,900	12,094	104.1	109.6	113.2	0.76	0.92	0.94
AGRICULTURAL, FISH & FORESTRY TOTAL	17,345	14,987	15,404	116.6	121.8	126.9	0.67	0.81	0.82

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	2014	2015	2016
Germany	4,206	3,515	3,553
Italy	1,179	1,032	1,077
Netherlands	747	632	618
Switzerland	482	408	416
Spain	391	373	413
Hungary	429	329	338
Poland	265	255	319
France	376	298	299
Turkey	207	245	239
Belgium	193	158	166
Czech Republic	135	108	105
Ireland	39	45	95
United Kingdom	96	92	89
Greece	85	79	84
Brazil	86	83	81
World	10,135	8,798	9,054

Source: Global Trade Atlas

Fish & Seafood Products (In Millions of U.S. Dollars)			
Top 15 Suppliers	2014	2015	2016
Germany	183.1	152.9	148.9
Netherlands	47.6	46.3	46.0
Norway	39.5	33.5	45.1
Poland	23.3	26.1	33.5
Turkey	3.9	2.9	30.2
Italy	28.7	24.9	26.3
Vietnam	20.0	22.8	25.8
Denmark	26.1	25.2	21.9
France	16.6	16.4	18.0
Spain	13.7	11.6	11.8
Thailand	14.0	7.3	8.9
India	8.2	8.6	8.7
China	7.4	6.5	6.7
Slovenia	10.4	7.7	6.3
Kazakhstan	5.5	5.6	6.2
World	526.6	460.0	518.0

Source: Global Trade Atlas

Related Reports

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http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx

GAIN Reports
The Skinny on New EU Rules for Weight Loss Products|FAIRS Subject Report|Brussels USEU|EU-28|10/31/2017 New EU rules for "total diet replacement for weight control" will become applicable on October 27, 2022. Commission Delegated Regulation 2017/1798 sets out specific compositional and labeling requirements as well as a notification procedure under which food business operators are required to send copies of their product labels to the competent authority of each Member State where the product will be marketed. The Skinny on New EU Rules for Weight Loss Products_Brussels USEU_EU-28_10-25-2017
Electronic Certificate of Inspection Required for EU Organics Trade|Special Certification - Organic/Kosher/Halal SP2 - Prevent or Resolve Barriers to Trade that Hinder U.S. Food and Agricultural Exports Agricultural Situation|Brussels USEU|EU-28|10/5/2017 The European Union (EU) has implemented a new system of electronic Certificates of Inspection for imports of organic products in the EU. The electronic certificates replace the paper-based certificates of inspection. The electronic certificates have been accessible through the EU's Trade Control & Expert System (TRACES) since April 19, 2017. During a transitional period until October 19, 2017 both the paper and the electronic certificate are valid. However, as of October 19, 2017 only the ce... Electronic Certificate of Inspection Required for EU Organics Trade_Brussels USEU_EU-28_10-2-2017
European Court Prohibits Use of Dairy Names for Non-Dairy Products|FAIRS Subject Report Trade Policy Monitoring|Brussels USEU|EU-28|7/14/2017 On June 14, 2017, the European Court of Justice (ECJ) ruled that plant-based products cannot be labeled with dairy names such as "milk" or "butter" even if the plant origin is clearly indicated on the label. The ECJ ruling gives a very strict interpretation of the EU's rules on the use of designations reserved for milk and milk products. It prohibits the use of reserved dairy names in association with plant-based products unless the names are explicitly included in an EU-list of authorized exc... European Court Prohibits Use of Dairy Names for Non-Dairy Products_Brussels USEU_EU-28_7-11-2017
European Commission Report on Labeling of Alcoholic Beverages|FAIRS Subject Report Wine Trade Policy Monitoring|Brussels USEU|EU-28|4/11/2017 On March 13, 2017, the European Commission presented its long awaited report examining whether mandatory nutrition labeling requirements should be extended to alcoholic beverages with an alcohol content of more than 1.2 percent by volume. Following the conclusions of the report, the Commission has invited the alcoholic beverages industry to present a self-regulatory proposal covering all sectors (wine, beer, spirits). European Commission Report on Labeling of Alcoholic Beverages_Brussels USEU_EU-28_4-5-2017
EU Export Promotion Programs for Agricultural Products|Trade Policy Monitoring Export Promotion Programs|Brussels USEU|EU-28|3/24/2017 A key element of the EU's new promotion policy called "Enjoy! It's from Europe" is the adoption of annual work programs that set out strategic priorities for promotion measures in terms of products, schemes, target markets and available resources. This report provides detailed information on the new promotion policy and the priorities set out in the annual work programs for 2016 and 2017. EU Export Promotion Programs for Agricultural Products_Brussels USEU_EU-28_3-20-2017
FAIRS Export Certificate Report|Food and Agricultural Import Regulations and Standards - Certification|Brussels USEU|EU-28|3/16/2017 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_2-13-2017

Organic Products – Market Information|Special Certification - Organic/Kosher/Halal Product Brief|Vienna|Austria|2/15/2017

Austria is one of the leading countries in organic production and consumption. In 2016, about 21 percent of the total agricultural area and 18 percent of all farms were under organic management. Austrians rank number six in per capita expenditures on organic products. Organic expenditures per household rose by 29 percent between 2011 and 2015. Most important organic outlets are conventional supermarket chains. There are good market prospects for U.S. organic products which are not locally p...
Organic Products – Market Information_Vienna_Austria_2-10-2017

EU Country of Origin Labeling - Member State Initiatives|FAIRS Subject Report Trade Policy Monitoring|Brussels USEU|EU-28|2/10/2017

The proliferation of national Country of Origin Labeling (COOL) measures in recent months is a result of a provision in the EU's Food Information to Consumers (FIC) regulation that provides a way for individual Member States to enact mandatory COOL rules. Eight Member States now have national-level COOL measures that are in effect or in process. This report provides an overview of the EU's rules on COOL including the process for introducing national COOL requirements.
EU Country of Origin Labeling - Member State Initiatives_Brussels USEU_EU-28_2-7-2017

Phytosanitary Requirements for EU Imports of Nuts|Tree Nuts Food and Agricultural Import Regulations and Standards - Narrative|Brussels USEU|EU-28|2/2/2017

A phytosanitary certificate is NOT required for the import of nuts from the United States into the European Union (EU). This understanding of the EU's plant health legislation has been confirmed by the European Commission and is applicable in all EU Member States.
Phytosanitary Requirements for EU Imports of Nuts_Brussels USEU_EU-28_1-25-2017

FAIRS Country Report|Food and Agricultural Import Regulations and Standards - Narrative|Vienna|Austria|1/17/2017

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_1-12-2017

Exporting Food Supplements to the European Union|FAIRS Subject Report Product Brief|Brussels USEU|EU-28|1/16/2017

Marketing food supplements in the European Union (EU) is a complex issue. Food Supplements Directive 2002/46 only contains EU-harmonized rules on labeling and authorized vitamins and minerals. Key aspects in the marketing of food supplements such as minimum and maximum levels for vitamins and minerals and the use of botanical ingredients are subject to the Member States' national rules. Food supplements containing animal origin ingredients must comply with the EU's veterinary inspection and ...
Exporting Food Supplements to the European Union_Brussels USEU_EU-28_1-11-2017

Roadmap to the Austrian Market|Exporter Guide|Vienna|Austria|12/20/2016

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 product...
Exporter Guide_Vienna_Austria_12-14-2016

FAIRS Country Report|Food and Agricultural Import Regulations and Standards - Narrative|Brussels USEU|EU-28|12/19/2016

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 the EU's new dietetic food rules applicable since July 20, 2016 (Section

V-VI). For updated 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_12-9-2016

FAIRS Export Certificate Report|Food and Agricultural Import Regulations and Standards - Certification|Vienna|Austria|11/28/2016

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_11-17-2016

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