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# Austria

# Exporter Guide

# 2000

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**Report Highlights: In 1999, Austrian food and agricultural imports from the United States rose 18%, despite the stiff competition from European Union (EU) and central and eastern European producers. U.S. products now garner 5.3% of the market. Functional foods, organics, seafood and gourmet foods all have good market prospects.**

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# I. Market Overview

### Economic Situation

Austria can be characterized as a highly developed and is the world's 12th highest per capita income. Austria's connections to international markets are strong and underscored by EU membership, participation in the Euro single currency, and its position as a crossroad to central and eastern Europe. Following 2.9% real GDP growth in 1998, Austria's export-driven economy expanded 2.1% in 1999. Due to the improved international economic climate, the Austrian economy, driven by exports, investment and consumer demand, has gained momentum and is experiencing a strong cyclical upturn. Forecasts for 2000 call for growth of 3.5%, and those for 2001 for 3.2%. Private consumption is also strong and household disposable income was recently boosted by tax cuts and higher family benefits. The strong economic growth will have a positive impact on the labor market. The unemployment rate is expected to decline from 3.7% in 1999 to 3.5% in 2000/2001. Inflation is expected to remain around 2% in 2000/2001.

From 2000 to 2004, the Austrian economy is expected to grow at an average annual real rate of about 2.5%, faster than the 2.1% during the period 1995 - 1999.

Austria's new government, in office since February 4, 2000, has declared a balanced total public sector budget by 2002 as its central economic goal. Plans to achieve this goal comprise a mixture of tax measures, expenditure cuts and administrative reform.

The Austrian schilling (and the Euro) depreciated some 4% against the dollar in 1999 and 10% in the first half of 2000.

### Effects of Economic Situation on Sales of US Products

Rising income coupled with falling numbers of unemployed allow for more spending on luxury goods. Thus, high quality U.S. products including exclusive niche products should find a small but growing market in Austria. In general, U.S. foods are more expensive than domestic ones or corresponding products coming from other EU countries (which do not pay import duties).

### Demographic Developments and Their Impact on Consumer Buying Habits

The number of single households and childless double working partnerships is rising. While at the beginning of the sixties there were not even a half million single households in Austria, today there are nearly one million which corresponds to almost one third of all households. The number of larger households has not risen as strongly.

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

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 those on a low income, are willing to spend more for "exclusive" products. In addition, the higher income and gourmet market segments (which regular buy high priced foods) is growing.

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

**Food Expenditures**

In 1998, expenditures for foods and beverages rose to AS 70,300 per household (roughly US$ 5,700) which is an increase of 0.75% (in absolute terms) compared to 1997. However, in regards to total expenditures, food and beverage expenditures dropped from 19.6% to 19.4%.

According to the Agricultural Ministry, Austrian households bought imported foods valued AS 265.3 billion, or roughly US$ 21 billion. The average Austrian household includes 2.5 persons.

**Size and Growth Rate of the Consumer Foods Market**

General
1999 total sales (including non-food sector) in the food retail trade were about AS 168 billion (US$ 13 billion) which corresponds to nearly one third of total retail trade. The actual turnover for food is not available but is estimated to be about 80% of the total. In 1995, the first year after EU accession, food sales declined 2% by value because of a slight drop in food prices. However, in 1996 the sales value began to rise. It is believed that in 2000, food turnover rose by 2%, a rate that can also be expected to continue over the next few years.

In addition to sales by food retail shops, food products valued AS 16 billion (US$ 1.2 billion) are sold each year by farms and farmer markets.

Convenience Products
In Austria, convenience products are currently lagging behind those of most other western countries but they have a great future. In 1998, the total turnover of these products reached 46,300 MT valued at AS 3.5 billion (US$ 282 million) up nearly 2%. Except for moist ready-to-eat dishes (mainly canned dishes), which were up 4%, all convenience products increased their turnover compared to 1997. The share of ready to eat dishes in plastic trays continued to rise considerably, and dry-ready-to eat dishes achieved a turnover of AS 236 (US$18.4 million), up 11%. The market of chilled ready-to-eat dishes rose 7% to AS 370 million ($28 million); the increase was primarily attributed to meat dishes. Chilled pizzas lost ground to frozen pizzas. The turnover of ready-to-eat soups grew 2.8% but that of bagged soups dropped 2.8%.

Convenience Products, Type by % Turnover

| | |
|---|---|
| Wet ready-to-eat dishes | 7.2% |
| Frozen ready to eat dishes (Fruits and vegetables, fish, ice cream , tarts, and potato products not included) | 54.0% |
| Dry ready-to-eat dishes | 6.7% |
| Chilled ready-to-eat dishes | 10.6% |
| Sauces | 4.4% |
| Ready to eat soups | 4.0% |
| Bagged soups (dry) | 13.1% |

The convenience market is expected to grow further in the next years. However, since it is characterized by falling prices, the increase by volume will be stronger than by value.

Market researchers forecast the following turnover in million AS for 2000:

| | |
|---|---|
| Chilled ready-to-eat dishes | AS 443 (US$ 30.8) |
| Dry ready to-eat-dishes | AS 262 (US$ 18.2) |
| Frozen ready-to-eat dishes (Fruits and vegetables, fish, ice cream , tarts, and potato products not included) | AS 2,034 (US$ 142) |
| Moist ready to eat dishes | AS 250 (US$ 17.4) |

Confections
In 1998 (no later figures available), turnover for confectionary products was AS 6.59 billion (US$ 532 million), an increase of 1.9% compared to 1997. Cereal bars in particular have a bright future. Chewing gum is trending toward sugar-free drops, which should have a 10% growth potential. Within the wafer/cookie sector, the market is split into extremes: both high priced and discount products are market leaders.

The wellness wave is also in how confectionary products are being marketed. In the growing chewing gum sector, the assortment of sugar-free types is rising. In addition, dietetic chocolate, sugar-free candies, products enriched with fibers and vitamins are benefitting from a steadily increasing market.

Shares of Confectionary Products of the Total 1998 Confectionary Market:

| | |
|---|---|
| Chocolate bars or blocks | 18% (+0.6%) |
| Chocolate pieces and assortments | 17% (+0.6%) |
| Various cookies | 13% (+3.4%) |
| Normal chocolates | 13% (+6.6%) |
| Wafers | 11% (-0.2%) |
| All others | 27% (0.0%) |

Beverages
According to a 1998 Nielsen survey carried out in supermarkets (no more recent survey available), the demand for mineral water, fruit juices and iced tea increased considerably whereas the consumption of alcoholic beverages is decreasing. According to industry sources, the decline in the sale of alcoholic beverages in speciality shops is more pronounced than in the retail trade. The introduction of the 0.05 percent alcohol limit for drivers is given as a reason for the decline in consumption.

Sales of alcoholic beverages by volume declined by 0.8% whereby the largest turnover item, beer, dropped by 1.2%. According to the brewery industry, the Austrian market for traditional beer is probably saturated. However, light beers, medium varieties, mixed beers, and alcohol free beers gained a combined market share of up to 20% in the first half of 1998 compared to the same period of 1997.

Changes on the beverage market are moving quickly and are influenced by actual life style trends. Successful products such as Red Bull (an energy drink) has created a new beverage category. These products are marketed not to quench a customers thirst, but to offer other physical benefits such as energy, weight gain, or improved athletic performance.

Change in Beverage Sales in 1998 compared to 1997:

| | | |
|---|---|---|
| Total Beer | | -1.2% |
| of which alcohol-free beer | | +4.6% |
| Lemonades | | -0.8% |
| Total fruit juices | | +6.3% |
| Total fruit juices | | +5.3% |
| Iced tea | | +4.1% |
| Energy drinks | +6.2% | |
| Total non-alcoholic drinks | +3.6% | |
| Coffee | | -0.4% |
| Tea in bags | | +2.2% |
| Total hot drinks | | +2.0% |

Pet Food
In Austria there are around 1,5 million cats and a half million dogs. On average, pet owners spend AS 160 (US$11) for dog food and AS 153 ($10.6) for cat food per month. The entire dog and cat food market is about AS 3.3 - 3.5 billion (roughly US$ 263 million) per year.

At present, prepared pet food meets only 34% of the dietary needs of Austria's dogs and 38% of cats. This means that there is considerable growth left as 80% penetration of this market should be possible in the long term. In addition, pet numbers are expected to continue slightly rising which should further increase pet food sales. The number of dogs is especially increasing. For every home with a dog, one out of seven has two or more.

Seafood
Seafood consumption (including fresh and salt water fish and invertebrates; fresh frozen and

canned) is low but rising. Most Austrian families spend only about 1% of their total food budget on purchases of fish and fish products. Per capita consumption, which was 5.2 kg in 1990, increased to around 6.1 kg in 1998. Freshwater fish consumption accounts for roughly 10% of total seafood consumption.

The 1999 per capita seafood consumption declined 1.6% compared to 1998. The decline included fresh, frozen, and dried fish. However, consumption of crustaceans rose 10%. Despite the small drop in total seafood consumption, it is expected that it will continue its overall upward trend in the coming years. The reason for this trend is the rising standard of living, health awareness, the rising number of restaurants serving seafood and the fact that tourism to coastal countries has acquainted the population with seafood. Most fresh/frozen whole fish is consumed in restaurants, whereas housewives still prefer natural or breaded frozen filets or sticks of cod, hake and flatfish. Among canned fish, tuna and sardines lead.

Consumption of seafood includes fish (fresh, chilled, frozen 2kg/capita; dried and/or salted, smoked etc. 0.4kg/capita), crustaceans (fresh, chilled, frozen 0.1 kg/capita), and molluscs (fresh, chilled, frozen, dried 0.1 kg/capita). Consumption of canned and marinated seafood products is around 24,400 MT of which 23,000 MT account for by fish and 1,400 MT for by crustaceans and molluscs. Among saltwater fish, most in demand are cod (chilled or frozen), cod filets (breaded and frozen), canned fish (sardines, anchovy, tuna, herring), pickled fish (mainly herring), and smoked fish (various types). There has been a definite upward trend in the popularity of salmon (mostly from Norway and Scotland) and luxury products such as lobster and shrimp.

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

| Advantages | Challenges |
|---|---|
| An aging population | Reservation towards foods containing or made from genetically modified products |
| Urban population growing | Reservations towards products with chemical food additives |
| High quality of U.S. products | Average tariff levels are high |
| Good reputation of certain U.S. products | Large distance to this market keeps shipping costs high |
| Promotion can possibly be carried out in cooperation with Embassy marketing efforts of U.S. products | High promotion costs to increase consumer awareness |
| Interest in organic U.S. products by traders | Highly concentrated food retail market |
| Good infrastructure, efficient distribution system, most importers speak English | Difficult to acquire shelf space in large supermarket chains |
| Interest in new food articles | Usually relatively small quantities are imported. |
| Marginal domestic seafood production | Unawareness of high U.S. quality by consumers |
| Certain fruits, vegetables not produced by domestic agriculture | |
| Undeveloped niche market for certain game meats | |
| Growing interest in ethnic foods and sea foods due to rising vacations in distant and costal areas | |
| Growing pet food market | |

## 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 also carry out imports. However, some items are purchased through wholesale importers (e.g. 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**

Austrians have conservative tastes that are reflected in the local cuisine and in local production methods and marketing. In recent years, attention has been drawn to food additives. Austrians prefer foods without artificial flavors, stabilizers, emulsifiers, and preservatives. In addition, most consumers reject foods containing genetically modified products. For this reason, the leading supermarket chains banned such products from their shelves. Similarly, there is significant consumer interest in organic products. Sales of these products are still low but are rising. Economists believe that organic products may someday reach 10% of the total food market. Light products are also in; however, consumers do not seem to tolerate a loss in flavor as compared to 'normal' products.

As in other western countries, beef consumption has been declining, whereas pork, poultry, and lamb have been increasing. The latter is mainly a result of immigration from Islamic countries. Cheese consumption, which has already high, will continue rising. This is particularly true for semi-hard and fresh cheeses.

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

**Food Standards and Regulations**

With regards to foods: See Food and Agricultural Import Regulations and Standards report #AU0029 (this may be found at: http://www.fas.usda.gov/scriptsw/attacherep/default.asp)

Regarding pet food: Registration is not required; however, the products have to comply with EU regulations.

**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. Packaged foods are not routinely checked by food inspectors at the port of entry storage. 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.

Veterinary and customs import documents must be in German. However, if a customs officer or border veterinarian can read another language, he may accept it. 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.useu.be/AGRI/usda.html

## III. Market Sector Structure and Trends

**Industry Concentration**

Since EU accession, concentration in the food industry and food retail sector has accelerated. Many food processing companies are too small to survive alone in a large market and therefore merge with larger national or foreign firms. U.S. companies may be interested in acquiring Austrian food factories or retail shops. So far, Master Foods appears to be the only U.S. enterprise in Austria involved in food processing.

**Industry Capacity and Foreign Supplied Products**

EU accession had a great negative impact on the food industry, which is the most important sector of all Austrian industries. Since 1995, the value of products sold by the food industry has declined each year. In 1998 it fell to AS 76.1 million (US$ 6.1 million) (tobacco/products not included) and in 1999 to AS 74.7 million. The primary processing industry in particular suffered losses. However, the decline in sales value is to some extend attributed to lower prices, a consequence of the drop in raw material prices due to a change in agricultural policy.

After several years of shrinking, the economic situation of the food industry is recovering. The industry should stabilize in 2000 and a slight production increase in expected in 2001. This assumption is based on the general economic prospects and increasing investments by the food industry. In 1998, investments rose by 7.5% to AS 6.95 billion (US$ 56 million) and a further increase in investment is expected in 2000.

In 1999, about 275 large scale food industry plants (down 4.5% from 1998) employed 29,400 employees. The entire food industry, including small enterprises such as bakeries, small dairies, etc. had a about 56,000 laborers.

More than three quarters of all agricultural supplies, including raw material for the food industry comes from other EU countries and only 7% from central European countries. Regarding imports of processed foods, 90% come from other EU countries.

The food industry is very interested in EU enlargement because it will lower raw materials costs.

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

**Promotion and Marketing Strategies**

The most efficient advertising is television, which nonetheless tends to be more expensive in Austria than in the U.S. The industry uses this medium for promoting food and pet food brands, and the two largest supermarket chains have regular TV spots. Supermarket and hypermarket chains have their own weekly or bi-weekly flyers where products available in their stores are advertised. These fliers reach a wide range of interested purchasers and thus are regarded as efficient. In-store promotions are also very successful. There are several U.S. products which have probably good chances on the Austrian market, e.g. pecans, catfish, etc. However, as these products are fairly unknown, large promotion efforts would be necessary.

**Tourism Sales**

Tourism contributes 6% to Austria's GDP and thus plays an important economic role. Each year around 80 million overnight stays by foreigners are logged. The major share of tourists come from Germany (about 50 million), followed by Netherlands (7 million). The main tourist areas are the western and southern alpine regions (Tyrol 39 million, Salzburg 15 million, Carinthia 9 million).

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

**Internet Sales**

Internet sales in Austria began at the end of 1998. However, of the seven large supermarket chains, only two (Meinl and Billa) offer e-mail orders. Delivery is carried out by mail or by direct delivery and additional delivery fees are charged. The other supermarket chains provide information on home pages and are waiting to see how Internet purchases develop.

So far, Internet purchasing is moderate but the rising use of general Internet users (1998: 450,000, 1999: 710,000) is expected to increase this market channel.

The Austrian Country Market, a farmer organization, provides the possibility for e-mail orders direct from farms. In 1999 it more than doubled their sales compared to 1998.

## IV. Best High-Value Product Prospects

The 15 consumer food/edible fishery products which offer the best U.S. export opportunities are as follows:

Beef, non-hormone treated
Alaska Salmon
Catfish
Lobster
Shrimp

Pecans
Walnuts
Pistachios
Almonds
Dried cranberries
Other dried fruits
Cranberry juice
Wine
Tobacco
Petfood

## V. Key Contacts and Further Information

American Embassy
Agriculture Section
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A-1090 Wien
Phone: + 43 (1 ) 31 339/ext 2249
Fax: + 43 (1 ) 310 8208
e mail: agvienna@compuserve.com
Website: http://www.usembassy-vienna.at/usda/

Bundesministerium fuer Wirtschaft und Arbeit
(Federal Ministry for Economic Affairs)
Abteilung II/11
(Division II/11)
Stubenring 1
A-1011 Wien
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Fax: + 43 (1 ) 715 96 51
Website:http//.www.bmwa.gv.at/

Bundesministerium fuer Land- und Forstwirschaft
(Federal Ministry for Agriculture and Forestry)
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Website:http://www.bmlfuw.gv.at

Agrarmarkt Austria (AMA)
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Website: http://www.ama.bmlf.gv.at

Austrian Economic Chamber
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Bundesanstalt fuer Lebensmitteluntersuchung und -Forschung
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# Appendix I. Statistics

## A. Key Trade & Demographic Information

*AUSTRIA*

| ***TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION*** | **YEAR** | **VALUE** |
|---|---|---|
| Agricultural Imports From All Countries ($Mil)/U.S. Market Share(%) | 1996 | 4,460 / 2% |
| Consumer Food Imports From All Countries ($Mil)/U.S. Market Share(%) | 1996 | 3,196 / 1% |
| Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share(%) | 1996 | 191 / 0.36% |
| Total Population (Millions)*/Annual Growth Rate (%)* | 2000 | 8.1 / 0.2% |
| Urban Population (Millions)*/Annual Growth Rate (%)* | 1999 | 5.12 / 0.27% |
| Number of Major Metropolitan Areas | 1999 | 1 |
| Size of the Middle Class (Millions)/Growth Rate (%) | n/a | n/a |
| Per Capita Gross Domestic Product (U.S. Dollars)** | 1999 | $25,754 |
| Unemployment Rate (%) | 1998 | 3.7% |
| Per Capita Food Expenditures (U.S. Dollars) | 1997 | $1537.25 |
| Percent of Female Population Employed** | 1997 | 43.5% |
| Exchange Rate (US$1 = X.X local currency) | 9/22/99 | 15.88 |

* denotes information collected from www.cia.gov
**denotes information collected from www.worldbook.org

## B. Consumer Food & Edible Fishery Product Imports

**Austria Imports of Agriculture, Fish & Forestry Products**
**(In Millions of Dollars)**

| | Imports from the World | | | Imports from the U.S. | | | U.S Market Share | | |
|---|---|---|---|---|---|---|---|---|---|
| | 1997 | 1998 | 1999 | 1997 | 1998 | 1999 | 1997 | 1998 | 1999 |
| BULK AGRICULTURAL TOTAL | 508 | 517 | 406 | 9 | 14 | 17 | 2% | 3% | 4% |
| Wheat | 17 | 15 | 21 | 1 | 1 | 1 | 0.16% | 0.14% | 0.06% |
| Coarse Grains | 28 | 22 | 24 | 1 | 1 | 1 | 2% | 1% | 1% |
| Rice | 27 | 25 | 21 | 2 | 2 | 2 | 9% | 9% | 11% |
| Soybeans | 6 | 5 | 3 | 1 | 1 | 0 | 8% | 7% | 0% |
| Other Oilseeds | 36 | 56 | 39 | 3 | 4 | 1 | 9% | 7% | 3% |
| Cotton | 63 | 59 | 43 | 1 | 4 | 3 | 0.62% | 8% | 7% |
| Tobacco | 30 | 34 | 32 | 1 | 0 | 1 | 0.80% | 0% | 0.87% |
| Rubber & Allied Gums | 34 | 33 | 27 | 1 | 1 | 1 | 0.01% | 0.02% | 0.00% |
| Raw Coffee | 204 | 201 | 139 | 0 | 1 | 8 | 0% | 0.73% | 6% |
| Cocoa Beans | 28 | 33 | 28 | 0 | 0 | 0 | 0% | 0% | 0% |
| Tea (Incl. Herb Tea) | 9 | 11 | 11 | 1 | 1 | 1 | 0.03% | 0.01% | 0.45% |
| Raw Beet & Cane Sugar | 5 | 3 | 3 | 0 | 0 | 1 | 0% | 0% | 0.04% |
| Pulses | 7 | 6 | 4 | 1 | 1 | 1 | 3% | 3% | 3% |
| Peanuts | 3 | 2 | 2 | 1 | 1 | 1 | 32% | 46% | 52% |
| Other Bulk Commodities | 9 | 12 | 9 | 1 | 1 | 1 | 0.24% | 0.24% | 0.15% |
| INTERMEDIATE AGRICULTURAL TOTAL | 816 | 808 | 742 | 14 | 15 | 10 | 2% | 2% | 1% |
| Wheat Flour | 4 | 4 | 4 | 1 | 1 | 1 | 0.03% | 0.10% | 0.11% |
| Soybean Meal | 139 | 115 | 80 | 1 | 1 | 1 | 0.31% | 0.45% | 0.21% |
| Soybean Oil | 11 | 12 | 7 | 0 | 0 | 1 | 0% | 0% | 0.03% |
| Vegetable Oils (Excl. Soybean Oil) | 95 | 110 | 91 | 2 | 1 | 1 | 2% | 0.68% | 0.10% |
| Feeds & Fodders (Excl. Pet Foods) | 44 | 39 | 41 | 1 | 1 | 1 | 2% | 4% | 2% |
| Live Animals | 49 | 58 | 59 | 1 | 1 | 1 | 0.13% | 0.26% | 0.09% |
| Hides & Skins | 80 | 99 | 118 | 1 | 1 | 1 | 0.21% | 0.03% | 0.01% |
| Animal Fats | 16 | 11 | 7 | 0 | 0 | 0 | 0% | 0% | 0% |
| Planting Seeds | 46 | 45 | 33 | 3 | 3 | 1 | 6% | 6% | 2% |
| Sugars, Sweeteners, & Beverage Bases | 96 | 83 | 74 | 1 | 1 | 1 | 0.37% | 0.50% | 0.64% |
| Essential Oils | 44 | 42 | 68 | 2 | 2 | 1 | 4% | 4% | 2% |
| Other Intermediate Products | 193 | 190 | 160 | 6 | 7 | 7 | 3% | 4% | 4% |
| CONSUMER-ORIENTED AGRICULTURAL TOTAL | 3,167 | 3,281 | 3,127 | 33 | 29 | 25 | 1% | 0.87% | 0.80% |
| Snack Foods (Excl. Nuts) | 337 | 361 | 341 | 1 | 1 | 1 | 0.28% | 0.28% | 0.22% |
| Breakfast Cereals & Pancake Mix | 25 | 23 | 27 | 1 | 1 | 1 | 0.17% | 0.18% | 0.34% |
| Red Meats, Fresh/Chilled/Frozen | 184 | 184 | 200 | 2 | 2 | 1 | 0.83% | 1% | 0.34% |
| Red Meats, Prepared/Preserved | 77 | 72 | 76 | 1 | 1 | 1 | 0.01% | 0.02% | 0.10% |
| Poultry Meat | 92 | 93 | 82 | 1 | 0 | 0 | 0.41% | 0% | 0% |
| Dairy Products (Excl. Cheese) | 112 | 144 | 153 | 1 | 0 | 1 | 0.04% | 0% | 0.00% |
| Cheese | 169 | 173 | 189 | 0 | 1 | 1 | 0% | 0.03% | 0.00% |
| Eggs & Products | 42 | 35 | 31 | 1 | 1 | 1 | 0.16% | 0.98% | 1% |
| Fresh Fruit | 393 | 387 | 343 | 1 | 1 | 1 | 0.23% | 0.22% | 0.16% |
| Fresh Vegetables | 234 | 231 | 203 | 1 | 1 | 1 | 0.11% | 0.13% | 0.11% |
| Processed Fruit & Vegetables | 270 | 275 | 255 | 6 | 6 | 5 | 2% | 2% | 2% |
| Fruit & Vegetable Juices | 113 | 117 | 140 | 2 | 3 | 1 | 2% | 2% | 0.80% |

| | Imports from the World | | | Imports from the U.S. | | | U.S Market Share | | |
|---|---|---|---|---|---|---|---|---|---|
| | 1997 | 1998 | 1999 | 1997 | 1998 | 1999 | 1997 | 1998 | 1999 |
| **Tree Nuts** | 68 | 48 | 38 | 11 | 8 | 5 | 16% | 16% | 14% |
| **Pet Foods (Dog & Cat Food)** | 56 | 65 | 68 | 4 | 1 | 1 | 6% | 0.42% | 0.25% |
| **Other Consumer-Oriented Products** | 613 | 675 | 602 | 5 | 4 | 5 | 0.76% | 0.64% | 0.88% |
| **FOREST PRODUCTS (EXCL. PULP & PAPER)** | 1,237 | 1,272 | 1,351 | 19 | 15 | 12 | 2% | 1% | 0.86% |
| **Logs & Chips** | 356 | 371 | 467 | 2 | 1 | 1 | 0.42% | 0.36% | 0.26% |
| **Hardwood Lumber** | 68 | 81 | 83 | 7 | 5 | 5 | 10% | 6% | 6% |
| **Softwood and Treated Lumber** | 163 | 156 | 160 | 2 | 1 | 1 | 1% | 0.78% | 0.61% |
| **Panel Products (Incl. Plywood)** | 240 | 258 | 257 | 7 | 7 | 4 | 3% | 3% | 1% |
| **Other Value-Added Wood Products** | 410 | 405 | 384 | 1 | 1 | 1 | 0.35% | 0.29% | 0.14% |
| **FISH & SEAFOOD PRODUCTS** | 187 | 206 | 181 | 1 | 1 | 1 | 0.43% | 0.36% | 0.13% |
| **Salmon** | 19 | 21 | 16 | 1 | 1 | 1 | 0.50% | 0.14% | 0.16% |
| **Surimi** | 1 | 1 | 1 | 1 | 1 | 1 | 0.41% | 0.29% | 0.57% |
| **Crustaceans** | 24 | 27 | 25 | 1 | 1 | 1 | 1% | 1% | 0.23% |
| **Groundfish & Flatfish** | 52 | 60 | 51 | 1 | 1 | 1 | 0.63% | 0.52% | 0.12% |
| **Molluscs** | 4 | 5 | 4 | 1 | 1 | 1 | 0.25% | 0.08% | 0.18% |
| **Other Fishery Products** | 87 | 92 | 84 | 1 | 1 | 1 | 0.11% | 0.12% | 0.08% |
| **AGRICULTURAL PRODUCTS TOTAL** | 4,490 | 4,606 | 4,274 | 55 | 57 | 52 | 1% | 1% | 1% |
| **AGRICULTURAL, FISH & FORESTRY TOTAL** | 5,915 | 6,083 | 5,806 | 75 | 73 | 64 | 1% | 1% | 1% |

***NA - Data not available (not reported)      Data: Harmonized Tariff Schedule (HS 6 Digit)***

***Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office***

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

### Table C 1

**AGRICULTURAL, FISH & FORESTRY TOTAL**

| Reporting Country: Austria Top 15 Ranking | Import | | |
|---|---|---|---|
| | 1997 | 1998 | 1999 |
| | 1000$ | 1000$ | 1000$ |
| Germany | 2,157,825 | 2,219,031 | 2,244,255 |
| Italy | 572,460 | 575,531 | 552,148 |
| Netherlands | 503,897 | 498,800 | 467,723 |
| Czech Republic | 239,557 | 229,851 | 247,631 |
| France | 294,921 | 284,902 | 241,698 |
| Hungary | 203,462 | 218,069 | 196,782 |
| Spain | 164,751 | 173,724 | 160,335 |
| Switzerland | 113,013 | 126,030 | 128,140 |
| Belgium | 0 | 0 | 113,041 |
| Slovakia | 82,057 | 73,946 | 82,568 |
| Turkey | 71,436 | 77,096 | 79,475 |
| Brazil | 79,832 | 81,717 | 74,052 |
| Denmark | 88,751 | 84,841 | 68,875 |
| Poland | 67,618 | 74,184 | 67,332 |
| United States | 75,069 | 73,261 | 63,852 |
| Other | 1,199,880 | 1,291,652 | 1,018,410 |
| World | 5,914,726 | 6,082,786 | 5,806,418 |

*NA - Data not available (not reported)      Data: Harmonized Tariff Schedule (HS 6 Digit)*

*Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office*

# Table C 2

## BULK AGRICULTURAL TOTAL

| Reporting Country: Austria Top 15 Ranking | Import | | |
|---|---|---|---|
| | 1997 | 1998 | 1999 |
| | 1000$ | 1000$ | 1000$ |
| Germany | 68,293 | 55,308 | 64,490 |
| Brazil | 46,332 | 47,698 | 47,185 |
| Hungary | 20,659 | 29,911 | 24,690 |
| Cote d'Ivoire | 27,044 | 29,642 | 24,099 |
| United States | 8,556 | 14,365 | 16,652 |
| Uzbekistan, Republic of | 35,856 | 25,262 | 16,269 |
| Italy | 17,370 | 14,625 | 12,224 |
| Indonesia | 10,166 | 13,152 | 11,778 |
| Belgium | 0 | 0 | 11,592 |
| Malaysia | 14,568 | 13,477 | 11,335 |
| Zimbabwe | 9,327 | 9,588 | 10,948 |
| Colombia | 33,477 | 44,312 | 10,244 |
| India | 10,245 | 10,749 | 8,617 |
| Vietnam | 4,554 | 4,528 | 7,869 |
| Guatemala | 9,259 | 11,994 | 7,692 |
| Other | 191,857 | 192,559 | 119,855 |
| World | 507,581 | 517,176 | 405,550 |

*NA - Data not available (not reported)    Data: Harmonized Tariff Schedule (HS 6 Digit)*

*Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office*

**Table C 3**
**INTERMEDIATE AGRICULTURAL TOTAL**

| Reporting Country: Austria Top 15 Ranking | Import | | |
|---|---|---|---|
| | 1997 | 1998 | 1999 |
| | 1000$ | 1000$ | 1000$ |
| Germany | 415,054 | 415,695 | 368,506 |
| Netherlands | 103,264 | 114,980 | 99,338 |
| France | 70,199 | 72,045 | 54,728 |
| Italy | 44,753 | 32,700 | 47,318 |
| Ireland | 2,736 | 2,126 | 26,009 |
| Belgium | 0 | 0 | 17,569 |
| Hungary | 12,790 | 16,223 | 10,478 |
| United States | 13,716 | 14,559 | 10,343 |
| Denmark | 12,619 | 10,228 | 10,155 |
| Switzerland | 10,413 | 9,889 | 9,295 |
| Slovenia | 3,067 | 5,780 | 8,388 |
| Czech Republic | 9,952 | 9,184 | 7,917 |
| Argentina | 6,528 | 2,941 | 7,228 |
| Thailand | 1,298 | 2,869 | 6,686 |
| United Kingdom | 5,837 | 7,698 | 4,536 |
| Other | 104,078 | 90,736 | 53,610 |
| World | 816,329 | 807,666 | 742,127 |

*NA - Data not available (not reported)  Data: Harmonized Tariff Schedule (HS 6 Digit)*
*Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office*

# Table C 4
**CONSUMER-ORIENTED AGRICULTURAL TOTAL**

| Reporting Country: Austria Top 15 Ranking | Import | | |
|---|---|---|---|
| | 1997 | 1998 | 1999 |
| | 1000$ | 1000$ | 1000$ |
| Germany | 1,119,609 | 1,167,345 | 1,218,477 |
| Italy | 450,850 | 468,678 | 431,682 |
| Netherlands | 358,932 | 345,960 | 334,786 |
| France | 185,559 | 170,987 | 152,533 |
| Spain | 156,012 | 162,962 | 151,576 |
| Hungary | 112,077 | 107,804 | 98,154 |
| Switzerland | 69,383 | 80,593 | 86,123 |
| Belgium | 0 | 0 | 77,667 |
| Turkey | 61,963 | 65,231 | 69,686 |
| United Kingdom | 51,979 | 54,594 | 41,005 |
| Poland | 31,267 | 43,176 | 38,039 |
| Ecuador | 25,286 | 18,701 | 33,593 |
| Ireland | 24,787 | 79,475 | 26,348 |
| Denmark | 35,858 | 30,907 | 25,410 |
| Greece | 24,173 | 26,271 | 25,236 |
| Other | 458,733 | 458,051 | 316,239 |
| World | 3,166,585 | 3,280,848 | 3,126,609 |

***NA - Data not available (not reported)   Data: Harmonized Tariff Schedule (HS 6 Digit)***
***Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office***

## Table C 5

### FOREST PRODUCTS (EXCL. PULP & PAPER)

| Reporting Country: Austria Top 15 Ranking | Import | | |
|---|---|---|---|
| | 1997 | 1998 | 1999 |
| | 1000$ | 1000$ | 1000$ |
| Germany | 477,728 | 489,597 | 503,656 |
| Czech Republic | 200,848 | 193,086 | 210,444 |
| Slovakia | 67,222 | 56,762 | 71,659 |
| Hungary | 57,585 | 63,887 | 63,228 |
| Italy | 52,316 | 51,708 | 52,234 |
| Finland | 55,199 | 54,932 | 50,293 |
| Russian Federation | 23,000 | 30,479 | 50,245 |
| Romania | 7,989 | 17,343 | 43,949 |
| Switzerland | 32,835 | 35,232 | 32,433 |
| Ukraine | 3,045 | 11,724 | 31,015 |
| Slovenia | 34,691 | 35,381 | 28,616 |
| Sweden | 41,584 | 39,321 | 28,150 |
| Poland | 24,185 | 23,766 | 24,869 |
| France | 26,040 | 28,341 | 22,438 |
| Croatia | 19,800 | 19,472 | 19,724 |
| Other | 113,114 | 120,509 | 117,886 |
| World | 1,237,199 | 1,271,535 | 1,350,845 |

*NA - Data not available (not reported)    Data: Harmonized Tariff Schedule (HS 6 Digit)*

*Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office*

## Table C 6

### FISH & SEAFOOD PRODUCTS

| Reporting Country: Austria Top 15 Ranking | Import | | |
|---|---|---|---|
| | 1997 | 1998 | 1999 |
| | 1000$ | 1000$ | 1000$ |
| Germany | 77,141 | 91,086 | 89,126 |
| Denmark | 26,585 | 30,768 | 23,289 |
| Netherlands | 22,448 | 21,069 | 15,879 |
| Italy | 7,171 | 7,820 | 8,690 |
| Thailand | 7,707 | 9,073 | 8,522 |
| France | 5,112 | 5,202 | 4,588 |
| Slovenia | 1,902 | 2,189 | 2,440 |
| Belgium | 0 | 0 | 2,147 |
| Sweden | 3,168 | 2,782 | 1,890 |
| United Kingdom | 3,534 | 2,999 | 1,781 |
| Norway | 2,654 | 1,801 | 1,619 |
| Morocco | 902 | 936 | 1,540 |
| Spain | 1,287 | 1,779 | 1,532 |
| Portugal | 1,705 | 2,418 | 1,495 |
| Czech Republic | 1,872 | 1,814 | 1,449 |
| Other | 23,825 | 23,801 | 15,294 |
| World | 187,032 | 205,561 | 181,287 |

*NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)*

*Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office*