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Market Brief - Sector

Austria : Pet Food

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Vienna [AU1], AU

General

The long term rise in pet numbers was only interrupted in 1994. According to the 1997 statistics, in Austria there were 1,509,000 cats, 545,000 dogs, 321,000 pat birds, 869,000 aquarium fish, and 783,000 other pets. At the same time, 28.8% of all households had one or more cats, 16.2% dogs, 4.9% birds, 3.1% aquarium fish and 10.9% other pats. Around 46% had at least one pet.

The most common birds are parakeets followed by canaries. Among other pets, guinea pigs and dwarf rabbits are predominant.

As a consequence of the rising number of single household and the rising number of older people seeking contact to living beings, the number of pets should continue its upward movement in the next few years.

Production

Pet food is produced by 13 factories who had a combined labor force of 586 employees in 1997. In the same year, consumption of raw material totaled 51,3200 MT of which 45% was covered by domestic production, 50% was imported from EU countries and 5% from non-EU countries. The share coming from EU countries has increased significantly after EU accession in 1995. According to industry sources, practically no raw material is imported from the US.

Domestic production of pet food has been rising continuously. In 1997, production rose 3.2% and reached 95,700 MT. A slight output increase is again expected for 1998.

Market

With the exception in 1995 (-5%) pet food sales have been continuously rising in the last 10 years. In 1996, total sales reached 77,000 MT of which 37% accounted for dog, 61% for cat, 1% for bird, and 1% for other pet feed (including aquarium fish).

Most of the dog and cat food market is covered by Master Food which covers 70% of the energy value of prepared dog and cat food sold in Austria.

On average, pet owners spend AS 160 for dog feed and AS 153 for cat feed/month which places the entire dog and cat food market to AS 3.3 billion/year.

At present, 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 to rise slightly which should further increase pet food sales.

Prices

After the price decline of 10 - 15% following EU accession, prices of most pet foods increased to the pre-EU level in 1997/98. However, according to a survey, prices may differ up to 150% in various shops .

Sample prices in one of Austria's largest super market chains:

Dog food:

“Schlemmermenue” of “Quality Line”: complete food containing lam, veal, beef or poultry in 400 gram cans AS 9.90.

“Pedigree Pal” : complete food containing lam, veal, beef or poultry in 400 gram cans AS 11.90.

“Frolic”: dry complete food made of beef, carrots and grain in boxes of 1.5 kilos AS 45.90; boxes of 0.5 kg AS 17.90.

“Premium” of “Ronny”: complete food containing game, chicken or duck with vegetables in flat cans of 300 gram AS 11.90.

Cat food:

“Kitekat”: complete food containing poultry and vegetables in 400 gram cans AS 9.90.

“Gourmet”: complete food containing poultry and rabbit or lam and poultry or duck and turkey in 400 gram cans AS 10.90

“Whiskas Katzenschmaus”: dry complete food containing poultry or beef or game in 300 gram boxes AS 15.90.

“Whiskas”: complete food containing poultry or beef with carrots in cans of 400 gram AS 11.90

Rate of exchange on August 26, 1998: \$ 1 = AS 12.52

Marketing Channels

Most of the pet food is sold in supermarket chains, drug stores and gas station convenience stores. The large producers supply these outlets directly. In addition, pet food is sold by veterinarians (1,500) and pet shops (350). There are 3 distributors serving pet shops, 3 serving veterinarians and 10 supply the 6 - 7,000 breeders. Only around 3% of the total dog and cat food is marketed by non-grocery stores.

Foreign Trade

Imports show a rising trend; in 1997 they reached 40,000 MT (+3.8%). In general, the major share comes from other EU countries (70%), followed by central European suppliers (10%). The predominant EU suppliers are France and Germany. Around 7% came from the US in 1997. Austria is however a net exporter of pet food; export sales in 1997 reached 58,500 MT, up 31% over the previous year.

Legal Requirements

As livestock feed, pet food is governed by the Austrian feed law number 905 of 1993, feed ordinance number 273 of 1994 and feed ordinance number 183 of 1996. Legal requirements are in line with EU regulations.

Registration of pet food was abolished in 1993. However, if it is to be marketed in Austria, it has to comply with EU regulations. Information on pet food requirements including labeling, can be obtained from

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Labeling requirements: trademark, use (for dogs, cats, etc.), composition, year and month of production, minimum shelf life.

The importation of pet food does not require any import license. However, veterinary certification according to Commission Decision 94/309/EEC and 97/199/EC is needed.

The EU import duty is valid for Austria. For example if the starch content is above 30% and the milk protein content below 10%, the duty rate is XEM 121.00/MT. With the same starch content but a milk protein content of 10 - 50%, the duty rate is XEM 685.300/MT. (1 XEM = AS 13.856)