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A faint, light gray outline of a world map serves as a background for the central section of the page.

Market Brief - Product

Austria : Seafood

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Vienna [AU1], AU

Summary

Austrian Seafood production is small and limited to freshwater fish. Given the rising standard of living, health and some other reasons, seafood consumption is increasing. Approximately 90% of domestic requirement has to be imported. Seafood imports, accounting to AS 2.3 billion in 1997, come mainly from Germany. The U.S. share is only marginal but rising. With some promotion, U.S. catfish and lobsters should find a good market in Austria.

Average rate of exchange: U.S. \$ 1 = AS 12.20 in 1997
AS 12.38 in 1998
AS 11.99 on February 4, 1999

End summary

Consumption Trends

Consumption of seafood (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 5.6 kg in 1993, and 6.0 kg in 1997. Freshwater fish consumption accounts for roughly 10% of total seafood consumption. The rise in seafood consumption is expected to continue in the next 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 increased making the population better acquainted with seafood. The major share of 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), crustacea (fresh, chilled, frozen 0.1 kg/capita), and molluscs (fresh, chilled, frozen, dried 0.1 kg/capita). The consumption of canned seafood products is around 3,300 MT of which 3,100 MT account for fish and 200 MT for crustacea and molluscs. Among saltwater items, 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 (Norway and Scotland) and luxury products such as lobster and shrimp.

Domestic and Foreign Competition

Austrian seafood production is limited to a relatively small quantity of freshwater fish, mainly trout and carp. Since Austria is a landlocked country, there are no domestic sources for marine products. Thus, all marine fish, shellfish, and crustacea must be imported. Austria's principal suppliers of seafood products are Germany, Netherlands, Denmark, Italy, and France.

Total seafood imports in 1997 were 47,000 MT, valued at AS 2.3 billion. At the same time

2,100 MT were re-exported. Imports of live, fresh, frozen fish accounted for 18,400 MT (AS 900 million) of which 31% came from Germany, 23% from Denmark, 12% from Netherlands, 9% from Italy and the rest from other, mainly European countries. The small quantity of dried and/or salted and/or smoked fish (1,700 MT, AS 180 million) came predominantly from Germany (47%), Denmark (22%), Netherlands 6%, United Kingdom 6% and the rest from other countries. Imports of fresh or frozen crustacea and molluscs increased since 1993 by more than 60% and reached 1,900 MT (AS 2.1 billion) in 1997. As usual, major shares came from Germany (63%), Netherlands (16%), Denmark (16%), and Italy 11%. Also the bulk of processed seafood (total 1997 imports 25,000 MT, valued AS 980 million) comes from the traditional main suppliers Germany (49%), Netherlands (11%), Denmark (4%).

U.S. Market Share

The U.S. is only a marginal supplier of seafood products to Austria; in 1997, the U.S. accounted for 112 MT, valued at AS 10 million. Since 1993, imports from the U.S. increased 67% which corresponds to the total increase in seafood imports. The main seafood items from the U.S. include fresh/frozen fish and prepared seafood products. Among fresh/frozen items (74 MT), which constitute the bulk of U.S. exports to Austria, are some catfish and cat fish products.

The Austrian market offers limited opportunities for U.S. exporters due to geographical separation, lower tariffs for EFTA members (Iceland and Norway) and free imports from other EU members with large seafood industries such as Germany, Denmark, Netherlands, and Sweden. However, since demand for luxury products is growing, some sales prospects exist for U.S. seafood such as lobster, crab, shrimp and related preserved fish products.

A good potential market should also exist for cat fish and catfish products, fresh and breaded. However, since catfish is practically unknown in Austria, promotion would be necessary. (The word catfish is in Austria probably not associated with high quality. Thus, it should be marketed under a more appealing name. Austria's largest trader in freshwater fish would be interested in the promotion of catfish in cooperation with U.S. firms or organizations.) Participation of U.S. seafood companies in the food fairs in Cologne (ANUGA) and Paris (SIAL), which are visited by most larger traders, provide good opportunities to introduce seafood products to potential Austrian buyers. In addition, it may be useful to exhibit U.S. products at the Salzburg tourist fair, which includes gastronomy.

Distribution Channels

The importation and distribution of seafood is controlled by three to four companies which sell directly to retailers, processing firms, government institutions, and the catering industry. The largest seafood trader is Eskimo-Iglo company, a Unilever subsidiary, which imports frozen marine fish and products and crustacea packed for them in Germany, Denmark, and Netherlands. The Cerny company is the largest trader in freshwater products but is also involved in marine seafood. This company has carp slaughter facilities. One importer, Nordsee, operates its own chain of retail outlets often combined with fast-food fish restaurant. Eisvogel, produces, smokes, and freezes trout and is a wholesaler for freshwater fish. In addition to these companies, there are about 40 small firms involved in fish wholesale trade. Canned seafood is also directly imported by the large supermarket chains which cover more than 90% of the Austrian food

market.

Pricing

	Wholesale Price Excluding 10% VAT	Retail Price Including 10% VAT
Unbreaded, Frozen		
Polar cod, free of spines, 400g box	34.04	49.90
Hake, free of spines, 400g box	34.04	49.90
Salmon, filet, 400g box	41.83	59.90
Plaice, filet, 350g box	48.57	69.90
Breaded, Frozen		
Polar cod, free of spines, 400g box	34.04	49.90
Hake, free of spines, 400g box	34.04	49.90
Plaice, filet, 300g box	44.62	59.90

Packaging and Labeling Requirements

- Name under which the product is sold
- Ingredients, including food additives, in descending order
- Net weight or quantity in metric units
- Expiration date (day/month/year)
- Lot number (producer, manufacturer, packer, or first wholesaler)
- Name or firm name and address of the manufacturer or packer, or first wholesaler
- Place of origin, including any particulars needed to clarify to consumers the true origin of the foodstuff
- Nutritional labeling (per the Austrian Ordinance on Labeling of Nutritional Values, Federal Gazette 896/1995): nutritional value including content of protein, carbohydrates, fat, fiber, minerals and vitamins. This regulation is compulsory if a nutritional claim appears on the label, in presentation, or in advertising, with the exception of generic advertising. Nutritional claims permitted are limited to those related to energy values and the following nutrients: protein, carbohydrates, fat, fiber, sodium, and prescribed vitamins.

Health claims and any health-related information on a food product require registration of the product at the Federal Chancery.

Food products can enter the country with standard U.S. labels or can be unlabeled, but before distribution they must be labeled in accord with local requirements. Stick-on labels meeting local requirements are permitted. Labeling must be in the German language.

Food Regulations

The following food regulations must be observed (concern primarily prepared seafood):

Directive 94/35/EC on sweeteners (Suessungsmittelverordnung, Federal Gazette # 547/1996 and 680/1996) sets conditions for the use of permitted sweeteners e.g. sorbitol, saccharine, etc.

Directive 94/36/EC on colors (Farbstoffverordnung, Federal Gazette # 541/1996) establishes a list of permitted colors and conditions of use (including maximum levels of use in particular foodstuffs), a list of foodstuffs in which colors may not be used, and a list of colors permitted for certain uses only.

Directive 95/2/EC on food additives other than colors and sweeteners (special miscellaneous directive) establishes a listing of generally permitted additives, conditionally permitted preservatives and antioxidants, anti-caking agents, emulsifiers, stabilizers, etc.

The Austrian Food Codex, chapter 35, describes fresh and frozen fish parts, fish products, and processing methods (drying, smoking, salting, marinating, freezing, canning), testing (histamines, heavy metals) and grading. In the same chapter, crustacea and molluscs and products of both those categories are defined.

Import Regulations

1. Veterinary Regulations

According to EU regulation, seafood shipments have to be accompanied by a health certificate. The certificate form for live fish and fish products and live crustacea and crustacean products and shell products is the same. Only live shells have a separate certificate form. Certification is carried out by FDA or the Seafood Inspection Division of the U.S. Department of Commerce. Only U.S. plants specially approved by FDA for export to the EU are eligible to export to Austria.

2. Customs Regulations

Seafood imports do not need an import license. The import duty for fresh water fish, including catfish from third countries is as follows:

whole fish, chilled or frozen	8.0%	plus 10% import turnover tax
filets, chilled or frozen	9.0%	plus 10% import turnover tax
filets, frozen, breaded	7.5%	plus 10% import turnover tax
live trout, carp	12.0%	plus 10% import turnover tax

The import duty for marine seafood is as follows:

a. Frozen fish, excluding filet:

Atlantic salmon	2.0%	plus 10% import turnover tax
sole	9.0%	plus 10% import turnover tax
cod	7.5%	plus 10% import turnover tax

b. Frozen fish filet of:

Atlantic salmon	2.0%	plus 10% import turnover tax
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cod	7.5%	plus 10% import turnover tax
c. Live lobster:	8.0%	plus 10% import turnover tax

List of Importers (fresh, frozen, processed, canned seafood):

1. Special Seafood Traders:

Eskimo-Iglo (Imports primarily from its sister company in Germany and
Marachfelderstr. 2 small quantities from Denmark and Netherlands. All is packed.)
A-2301 Grossenzersdorf
Fax: 43-2249-35 35 667
Tel: 43-2249-35 35 604

Cerny-Fischhandels G.m.b.H
Hermann Gebauer-Str. 18
A-1220 Vienna
Fax: 43-1-288 13 12
Tel: 43-1-288 13

Nordsee Ges.m.b.H.
Management
Doeblerhofstr. 14
A-1110 Vienna
Fax: 43-1-740 16 401
Tel: 43-1-740 16 650

Eisvogel (Trades only fresh water fish)
Hubert Bernegger G.m.b.H.
A-4591 Molln
Fax: 43-7584-30 90 10
Tel: 43-7584-30 900

2. Other Traders who Import or May Import Seafood:

Company: ADEG Handels AG - Food Retailer-Supermarket Chain
Title: Dkfm. Gaudenzdorfer Guertel 41-45
Contact: Guenther Mitteregger A-1220 Vienna, Austria
Position: Vorstandsmitglied
Fax: 43-1-813-2529
Tel: 43-1-811-460

Company: Billa Warenhandels AG. -Food Retailer-Supermarket Chain
Title: Mr. Billastrasse (Industriezentrum)
Contact: Veit Schalle A-2351 Wr Neudorf
Position: Generalbevollmaechtigter Austria

Fax: 43-2236-600228
Tel: 43-2236-6000

Company: Hofer KG- Food Retailer-Supermarket Chain
Title: Mgr.
Contact: Tuman A-4642 Sattledt
Position: Mr. Austria
Fax: 43-7244-800046
Tel: 43-7244-08000

Company: Julius Meinl AG- Food Retailer-Supermarket Chain
Title: Dr. Julius Meinl Gasse 3-7
Contact: Ferdinand Hacker A-1160 Vienna, Austria
Position: General Manager
Fax: 43-1-488-601-477
Tel: 43-1-488-60510

Company: Maximarkt GesmbH - Supermarket
Title: Dkfm Backermuehleweg 61
Contact: Johann Rohregger A-4034 Linz
Position: Geschaefsfuehrer Austria
Fax: 43-732-80811216
Tel: 43-732-808110

Company: M-Preis Warenvertriebsgesellschaft
Title: Mag. Landstrasse 16
Contact: Anton Moelk A-6176 Voels, Austria
Position:
Fax: 43-3512-30-445515
Tel: 43-3512-304455

Company: Pfeiffer Grosshandel
Title: Mag. Egger-Lienz Strasse 15
Contact: Georg Pfeiffer A-5040 Traun
Position: Director Austria
Fax: 43-722-93113269
Tel: 43-722-931130

Company: Spar Oesterr. Warnehandels AG - Food Retailer-Supermarket Chain
Title: Dr. Europastrasse 150
Contact: Gerhard Drexel A-4050 Traun, Austria
Position: Director
Fax: 43-6624-470505
Tel: 43-6624-470

Company: VOG Einfuhr & Grosshandel
Title: Mr. Baeckermuehlweg 44

Contact: Otto Bruckner A-4020 Linz
Position: Vorstandsvorsitzender Austria
Fax: 43-7323-738207
Tel: 43-7323-7380

Company: ZEV Markant Zentrale Einkaufs-Vertriebs GesmbH
Title: Dir. Leopoldgasse 4/1
Contact: Dieter Weihs A-1025 Vienna
Position: General Manager Austria
Fax: 43-1-214569634
Tel: 43-1-2145695

Company: Maresi Naehrmittel.
Title: Ms. Johannesgasse 23
Contact: Sabine Schwaiger A-1010 Wien
Position: Werdertorg. 5 - 7 Austria
Fax: 43-1-3341021
Tel: 43-1-5353831/39