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Austria

Exporter Guide

Road Map to the Austrian Market

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Report Highlights:
Austrian expenditures on food and non-alcoholic beverages grew 6.6 percent from 2008 to 2011 period, despite a sharp recession in 2009. Although products from Austria, Germany, and other EU countries dominate the Austrian food retail shelf space, there are good market 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 2010, the consumer-oriented sector accounted for 55 percent of total agricultural, fish and forestry imports from the United States, worth $ 45 million. Austrian consumer trends offer especially good market opportunities for sustainable, organic, health, diet and convenience food products. Market opportunities for U.S. products include fish and seafood products, nuts, wine, pet foods, dried fruits, fruit juices, snack foods, and high quality beef.

Table of Contents

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 Western Europe and is closely tied to other EU economies, especially Germany's. Austria is a part of the EU single market and customs union. International trade negotiations for all EU members are conducted by the European Commission (EC). The Austrian economy is characterized by a large service sector, a sound industrial sector, and a small, but highly developed agricultural sector. The Austrian economy tends to perform better than the EU average.

After a sharp recession in 2009, caused by slack export demand, the Austrian economy started recovering in 2010 and real GDP grew by 2.3 percent. This trend continued in 2011. Expectations for real GDP growth in 2011 are close to 3 percent. The major drivers for growth are increased exports and investment. The still unresolved debt crisis in the Euro area will likely lead to more cautious investment and, as a consequence, GDP growth is expected to decline to a modest 0.8 percent in 2012. (Source: WIFO)

In 2011, the unemployment rate is expected to be 4.2 percent which is considerably lower than the EU average. The Austrian inflation rate exceeds the Euro area average and may reach about 3.5 percent in 2011. (Source: WIFO)

With the exception of 2009, Austrian consumer expenditures have grown steadily in recent years and food and non-alcoholic beverages sales have benefited. From 2008 to 2011, consumer expenditures on food and non-alcoholic beverages grew 6.6 percent. In the light of the weaker economy, consumers tended to shift towards non-discretionary spending, which is a reason behind weaker expenditure growth for alcoholic beverages and tobacco. (Source: Euromonitor)

In 2010, Austrian consumer expenditures on food and beverages (non-alcoholic and alcoholic including tobacco) accounted for 14 percent of total consumer expenditures. The share of food and beverage expenditures is fairly stable. (Source: Euormonitor)

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

Consumer Expenditures	2007	2008	2009	2010	2011 *	2012 *
Consumer expenditures	17,841.0	18,372.9	18,368.6	19,132.2	*19,960.5*	*20,540.1*
Consumer expenditures on food and non-alcoholic beverages	1,933.2	2,042.7	2,044.2	2,128.5	*2,177.3*	*2,191.6*
Consumer expenditures on alcoholic beverages and tobacco	546.1	554.3	543.0	558.4	*578.1*	*587.0*

* Forecast
Source: Euromonitor

Although foods and beverages from Austria, Germany, and other EU countries dominate Austrian retail shelf space, there are good market 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 2010, the consumer oriented sector accounted for 55 percent of total agricultural, fish and forestry imports from the United States worth $ 45 million (source: Global Trade Atlas). Due to the global economic down-turn agricultural imports from the United States decreased in 2010 but are expected to recover as the global economy recovers. Official import numbers do not include significant and steadily growing transshipments of U.S. products from other EU countries.

Austrian Imports from the United States of Consumer-Oriented and Fishery Products in 2010

Product Category	Value, Thousands of $	Growth 2006 - 2010 in %
OTHER CONSUMER ORIENTED PRODUCTS	16,120	61.1
TREE NUTS	9,377	-12.0
PROCESSED FRUIT & VEGETABLES	5,153	1.7
WINE & BEER	3,050	-6.9
PET FOODS (DOG & CAT FOOD)	2,905	4.0
FRUIT & VEGETABLE JUICES	2,263	217.8
RED MEATS,FRESH/CHILLED/FROZEN	1,837	101.4
EGGS & PRODUCTS	1,605	45.4
SNACK FOODS (EXCLUD. NUTS)	1,553	12.1
OTHER FISHERY PRODUCTS	1,360	273.6
FRESH FRUIT	478	59.3
MOLLUSCS	467	367.0
SALMON	404	-55.2
DAIRY PRODUCTS (EXCL. CHEESE)	184	493.5
CRUSTACEANS	120	-22.6
RED MEATS, PREPARED/PRESERVED	46	475.0
BREAKFAST CEREALS/PANCAKE MIX	43	19.4
NURSERY PRODUCTS & CUT FLOWERS	42	-57.6
FRESH VEGETABLES	40	-82.5
GROUNDFISH & FLATFISH	15	-96.8
CHEESE	11	-91.6
POULTRY MEAT	0	-100.0
SURIMI	0	0

Source: Global Trade Atlas

Key Demographic Developments and Their Impact on Consumer Buying Habits

Austria has a population of 8.3 million. The number of single households and childless double working partnerships is rising. From 2005 to 2010 there was an increase of 9 percent in single-person households. The number of single households reached 1.3 million in 2010. This corresponds to 36 percent of all households. In 2010, an average household consisted of 2.3 people. The median age of Austria's population is gradually rising. In 2010, 23 percent of the total population was over 60 years old.

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. One result of the global economic difficulties is that Austrian consumers are tending to buy lower-priced alternate products. This is changing again with the recovering economy. 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 regularly buy high priced foods) are growing.

The traditional Austrian diet is based on pork, flour, and vegetables. Cakes and bakery products are important parts of the diet. Austrian dishes are rich in cholesterol and fat and the most important ingredient is meat, either pork or beef.

There is an increasing interest in healthy lifestyles, especially among younger consumers, , who are expressing more concern about daily calorie intake and a healthy diet, making low-fat food more and more popular. The younger generation also appreciates trying new products and is a logical segment to aim for with many new product introductions.

Biotech 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.

A counterpoint to the negative view of biotech crops and food products is Austria's growing market for organic agricultural products. The market share of organics in food retail accounts for about 5 percent and Austria has the highest percentage of organic farms in the EU. In 2011, 7.4 percent of all fresh food purchases in Austria were organic.

Driven by the Austrian government and NGOs Austrian consumers are getting more and more aware of environmental issues. This creates a rapidly growing market for sustainably produced food products. Reacting to this trend retail chains started launching private labels promoting "sustainability". The REWE concern for example introduced the label "Pro Planet" where they claim to sell food products produced responsibly for the environment and the society. The discounter Hofer promotes improved carbon footprint for its organic products under the label "Zurueck zum Ursprung". Furthermore some retailers promote fair trade products.

Growing health concerns together with increasing obesity brings the market for low calorie products forward. An increasing number of people suffering from allergies and higher awareness of the issue raise the demand for special allergy products.

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 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
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)	Growing retailers' promotion and consumer awareness of carbon footprint results in disadvantage for products with long-distance shipping
Growing interest in ethnic foods and sea foods due to rising vacations in distant and coastal areas	Lack of awareness of high U.S. quality by consumers
Growing pet food market	Retailers rarely import products into Austria, they prefer purchases from central buyers including other member states (mainly Germany)

II. Exporter Business Tips

Local Business Customs

In general, food retailers buy domestic and imported products from Austrian and/or German wholesalers. The large supermarket chains have their own purchasing sections, which buy and store foodstuffs centrally for their own retail stores. The central purchasing sections import directly in some instances. However, some items are purchased through wholesale importers (i.e. almonds). Due to the strong concentration of the food retail sector, the supermarket chains are very powerful vis-a-vis producers and slotting fees for retail space are the norm.

General Consumer Tastes and Preferences

Traditionally, Austrians have conservative tastes which are reflected in the local cuisine and in local production methods and marketing. However, the younger generation appreciates trying new food products and beverages.

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.

Similarly, there is significant consumer interest in organic products. Sales of organic products account for about 5 percent of retail sales. Economists believe that organic products may someday reach 10% of the total food market. "Light" products are also on a rising trend; 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 Middle Eastern countries. As a result of the financial crisis, consumers tend to buy less expensive meat cuts. Cheese consumption, which is already high, continues to rise. This is particularly true for semi-hard and fresh cheeses.

With fruit juices, tartness (higher acidity) is preferred to sweeter products. 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

See GAIN report:
Food and Agricultural Import Regulations and Standards Report - Austria:
http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative_Vienna_Austria_1-12-2011.pdf

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. Food inspectors at the port of entry do not routinely check packaged foods. However, the customs officer may take samples to double check for ingredients (sugar, milk powder, alcohol) and that customs duties are paid for these ingredients according to their proportion of the processed product.

Veterinary and customs import documents must be in German. Veterinary certificates are usually bi-lingual. There is no appeal of decisions by the customs office or the veterinary service.

If an importer objects to the quality of the product, the case can be brought to the arbitration center.

Complete information on EU import rules for food products may be found at:

http://www.fas.usda.gov/posthome/useu/ .

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 in a large market and therefore merge with larger national or foreign firms. Apart from Spar (Internationale Spar Centrale BV and Spar Österreichische Warenhandels AG), all leading food retailers in Austria are part of large and powerful German retailer groups. The top four chains cover about 70 percent of the domestic market.

Sales Volume of Leading Austrian Food Retail Chains, Million Euros

Food Retail Chain	2006	2007	2008	2009	2010	2011*
Rewe Group	3,818.5	3,986.8	4,820.6	4,867.0	4,971.7	5,135.6
Aldi Group	3,000.0	3,150.0	3,300.0	3,350.0	3,388.9	3,389.0
Internationale Spar Centrale BV	2,008.7	2,262.2	2,410.2	2,502.1	2,707.0	2,875.7
Spar Österreichische Warenhandels AG	2,298.3	2,238.0	2,372.9	2,405.3	2,420.6	2,469.7
Total Food Retail	17,188.6	17,789.2	18,513.8	18,787.0	19,124.1	19,561.0

* Forecast
Source: Euromonitor International

Domestic Industry Capacity versus Availability of Foreign-Supplied Products

More than three-quarters of all agricultural supplies, including ingredients for the food industry, comes from other EU countries. Regarding imports of processed foods, about 90 percent come from other EU countries.

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

Trends in Promotional/Marketing Strategies and Tactics

The most efficient advertising is television, which nonetheless tends to be more expensive in Austria than in the United States. The industry uses this medium for promoting food and pet food brands, and the two largest supermarket chains have regular TV spots. Supermarket, hypermarket and discounter chains have their own weekly or bi-weekly flyers in which products available and discounted products in their stores are advertised. These fliers reach a wide range of interested purchasers and thus are regarded as efficient. In-store promotions can also be very successful. (See IV. Best High-Value Product Prospects).

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

Tourism contributed about Euro 15.2 billion to Austria's GDP in 2010 (almost 5.4 percent) and plays an important economic role. In 2010, 125 million overnight stays by tourists were logged. The major share of tourists comes from Germany followed by Netherlands. The main tourist areas are the western and southern alpine regions and the capitals of the federal states.

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

There are only marginal internet sales for food products.

IV. Best High-Value Product Prospects

Consumer oriented and fishery products, which offer the best U.S. export opportunities, are as follow.

Product Category	Total Austrian Imports 2010 in 1000 of U.S. $ *)	Austrian Imports from the U.S. 2010 in 1000 of U.S. $ *)	Market Attractiveness for USA
Fish and Seafood Products	397,167	2,366	The Austrian market offers small but lucrative opportunities for fish and seafood products. Fish consumption in Austria is growing as consumers associate fishery products with a modern healthy diet. Domestic fish production is marginal and limited to fresh water fish like trout and carp. Due to transshipment within the EU, the real value of imports from the United States is thought to be much higher than indicated in customs statistics. Best prospects for U.S. fish and seafood exports are salmon, lobster, shrimps, crabs, caviar substitutes, catfish and scallops.
Tree Nuts	95,148	9,377	In 2010, the United States was the second most important supplier of tree nuts by 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 and Beer	297,773	3,050	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 2010, the United States was the sixth most important supplier of wine (by value) in Austria. U.S. wine sales increased in retail stores including discounters who mainly carry inexpensive U.S. wines.
Pet Foods	165,518	2,905	Since 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.
Pro-cessed Fruits and Vege-tables	679,978	5,153	Austrian imports of processed fruits and vegetables – mainly prepared nuts/seeds and dried fruits – are constantly growing. Those products are mostly used as ingredients by the food-processing sector for the production of pastries and breakfast cereals. Dried fruits and prepared nuts are also popular as a snack.
Fruit and Vege-table Juices	298,488	2,263	A very strong fruit juice industry makes Austria one of the most important juice importers worldwide. The demand for fruit juices has been steadily growing over the past years. Good opportunities for U.S. fruit juices in the Austrian market are citrus and cranberry juices.
Snack Foods (Excl. Nuts)	724,806	1,553	The Austrian demand for healthy, organic, innovative, and exotic snacks continues to grow.
Red Meats Fresh/ Chilled/ Frozen	624,612	1,837	Limited but lucrative opportunities exist for U.S. hormone free high quality beef, game and exotic meat for the upper scale gastronomy.

Source: *) Global Trade Atlas

V. Key Contacts and Further Information

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Office of Agricultural Affairs
Boltzmanngasse 16
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Fax: + 43 (1) 310 8208
Email: agvienna@fas.usda.gov
Website: http://www.usda-mideurope.com/

Bundesministerium fuer Wirtschaft, Familie und Jugend
(Federal Ministry of Economy, Family and Youth)
Stubenring 1
A-1011 Wien
Phone: + 43 (1) 71100 – 0
Email: service@bmwfj.gv.at
Website: http//.www.bmwfj.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
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Phone: + 43 (1) 71100 - 0
Email: infomaster@lebensministerium.at
Website: http://www.lebensministerium.at

Bundesministerium für Gesundheit
(Federal Ministry of Health)
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Wirtschaftskammer Oesterreich
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Website: http://www.wien.gv.at/lebensmittel/index.html

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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)]	2010	14,027/ 0.58%

Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2010	8,022/ 0.56%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)[1)]	2010	397/ 0.60%
Total Population (Millions)/Annual Growth Rate (%)[2)]	2011	8.2/ 0.034%
Urban Population (%)/ Rate of Urbanization (%)[2)]	2010	68% / 0.6%
Number of Major Metropolitan Areas	2011	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)[2)]	2010	$40,400
Unemployment Rate (%)[2)]	2010	6.9%
Consumer Per Capita Food Expenditures (Incl. Beverages and Tobacco) (U.S. Dollars) [5)]	2010	$2,687
Percent of Female Population Employed (15 to 65 years old)[3)]	2010	66.4%
Average Exchange Rate 2010 (US$1 = 0.755 Euro) [4)]	2010	0.755

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		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
CONSUMER-ORIENTED AGRICULTURAL TOTAL	8,786	7,991	8,022	58.1	48.6	44.7	0.66	0.61	0.56
SNACK FOODS (EXCLUD. NUTS)	767	742	725	2.2	1.9	1.6	0.28	0.26	0.21
BREAKFAST CEREALS/PANCAKE MIX	74	63	58	0.0	0.1	0.0	0.02	0.17	0.07
RED MEATS,FRESH/CHILLED/FROZEN	672	646	625	0.5	1.6	1.8	0.07	0.25	0.29
RED MEATS, PREPARED/PRESERVED	281	273	275	0.0	0.0	0.0	0.01	0.01	0.02
POULTRY MEAT	288	296	307	0.0	0.0	0.0	0.00	0.00	0.00
DAIRY PRODUCTS (EXCL. CHEESE)	465	395	395	0.8	0.0	0.2	0.18	0.00	0.05
CHEESE	493	414	419	0.0	0.0	0.0	0.00	0.00	0.00
EGGS & PRODUCTS	91	90	86	1.3	1.9	1.6	1.41	2.14	1.86
FRESH FRUIT	733	650	684	0.7	0.4	0.5	0.09	0.06	0.07
FRESH VEGETABLES	491	468	547	0.3	0.1	0.0	0.07	0.02	0.01
PROCESSED FRUIT & VEGETABLES	728	670	680	9.3	7.3	5.2	1.27	1.10	0.76

FRUIT & VEGETABLE JUICES	448	256	298	4.0	2.1	2.3	0.90	0.82	0.76
TREE NUTS	88	81	95	10.8	10.4	9.4	12.15	12.92	9.86
WINE & BEER	316	300	298	4.1	4.5	3.1	1.29	1.50	1.02
NURSERY PRODUCTS & CUT FLOWERS	449	430	439	0.2	0.3	0.0	0.05	0.06	0.01
PET FOODS (DOG & CAT FOOD)	184	168	166	3.6	3.9	2.9	1.95	2.30	1.76
OTHER CONSUMER ORIENTED PRODUC	2,218	2,052	1,924	20.4	14.0	16.1	0.92	0.68	0.84
FISH AND SEAFOOD PRODUCTS TOTAL	414	404	397	1.4	2.3	2.4	0.34	0.56	0.60
SALMON	49	48	54	0.4	0.7	0.4	0.89	1.49	0.75
SURIMI	0	0	0	0.0	0.0	0.0	0.00	0.00	0.00
CRUSTACEANS	53	52	56	0.3	0.1	0.1	0.55	0.25	0.21
GROUNDFISH & FLATFISH	12	14	14	0.0	0.0	0.0	0.04	0.00	0.11
MOLLUSCS	14	13	13	0.2	0.1	0.5	1.20	1.06	3.65
OTHER FISHERY PRODUCTS	285	277	261	0.5	1.3	1.4	0.17	0.47	0.52
AGRICULTURAL PRODUCT TOTAL	12,123	10,644	10,891	94.4	77.9	63.3	0.78	0.73	0.58
AGRICULTURAL, FISH & FORESTRY TOTAL	15,433	13,609	14,027	113.4	92.3	80.7	0.73	0.68	0.58

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 Supplier	2008	2009	2010
GERMANY	3,685	3,408	3,380
ITALY	1,010	969	1,026
NETHERLANDS	746	679	681
SWITZERLAND	313	319	310
SPAIN	328	303	307
HUNGARY	312	281	291
FRANCE	312	275	262
POLAND	312	218	219
BELGIUM	158	159	159
TURKEY	125	112	128
CZECH REPUBLIC	106	105	88
BRAZIL	98	72	79
CHINA	93	58	72
COSTA RICA	68	68	63
DENMARK	70	58	61
WORLD	8,786	7,991	8,022

Source: Global Trade Atlas

Fish & Seafood Products (In Millions of U.S. Dollars)			
Top 15 Supplier	2008	2009	2010
GERMANY	172.7	159.2	171.2
NETHERLANDS	50.1	43.6	37.8
DENMARK	29.7	26.2	23.7
NORWAY	13.0	15.2	23.2
ITALY	25.6	23.4	20.5
FRANCE	13.3	13.6	12.9
VIETNAM	8.1	12.2	12.9
THAILAND	17.5	10.0	7.6
PORTUGAL	6.8	6.1	6.5
CHINA	4.7	5.6	5.6
POLAND	6.4	9.1	5.5
BANGLADESH	3.9	4.9	5.2
KAZAKHSTAN	5.1	4.3	4.9
SLOVENIA	4.4	4.5	4.4
INDIA	6.0	5.3	4.4
WORLD	413.9	403.9	397.2

Source: Global Trade Atlas