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Austria

Food Processing Ingredients

An Overview on the Austrian Food Processing Sector

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Report Highlights:

The Austrian food processing industry plays a major role in the Austrian economy. It serves a market of 8.3 million people and is Austria's fifth largest industrial sub-sector. Total sales in 2010 were \$9.3 billion compared to \$7.3 billion in 2001. U.S. products with good prospects include tree nuts, wine, pet foods, processed fruits and vegetables, fruit juices, snack foods, convenience foods as well as health, organic and sustainable food products.

Post:

Vienna

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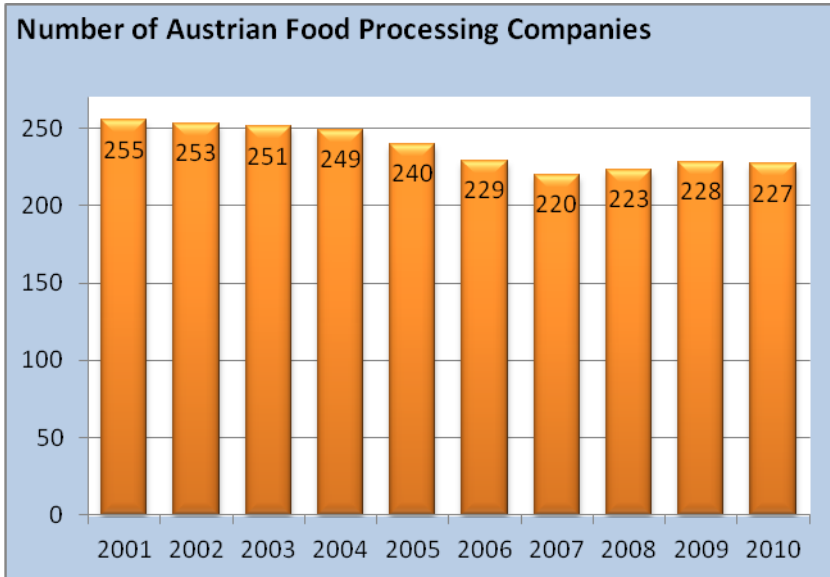
Section I. Market Summary

The Austrian food processing industry plays a major role in the Austrian economy. The food processing industry serves a market of 8.3 million people and represents the fifth largest industrial sub-sector. Total sales in 2010 were \$ 9.3 billion compared to \$ 7.3 billion in 2001.

The most important categories within the Austrian food processing industry, based on production, are the brewing, non-alcoholic beverages, confectionary, meat, and fruit juice. Over the past few years, the food industry was affected by the growing price pressure from food retailers and highly volatile agricultural raw material prices. The food industry in 2010 experienced a decline in turnover by 2.7 percent compared to 2009 but performed better than the Austria's industrial sector overall.

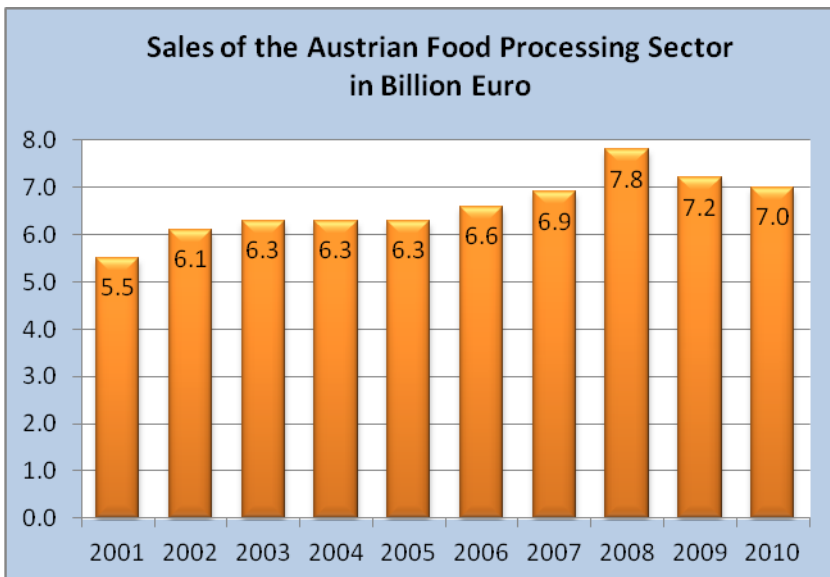
Although a small country, Austria has one of the highest standards of living in Europe and its affluent customers demand high quality products. U.S. products with good prospects include tree nuts, wine, pet foods, processed fruits and vegetables, fruit juices, snack foods, convenience foods as well as health, organic and sustainable food products.

With the exception of 2009, which was stagnant, consumer expenditures grow constantly, including expenditures on food and non-alcoholic beverages. From 2008 to 2011, consumer expenditures on food and non-alcoholic beverages grew 6.6 percent. In the light of a weaker economy, consumers tend to shift towards non-discretionary spending, which was expressed in a weaker growth in expenditures on alcoholic beverages and tobacco. (Source: Euromonitor)



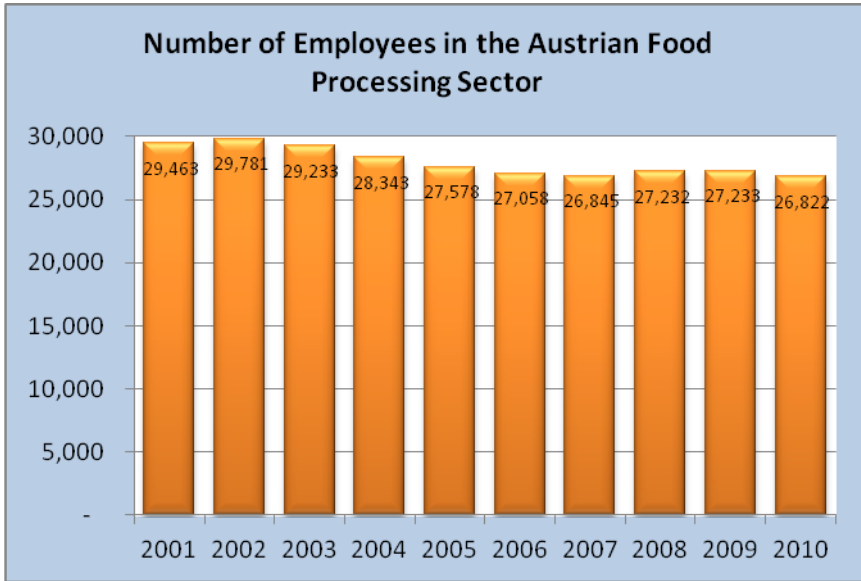
Source: Fachverband der Lebensmittelindustrie

In 1995, when Austria joined the EU, was critical for the food processing and drinks industry. From that time on, the sector underwent a major restructuring and consolidation process which continued until 2007. The number of food processing companies went from 346 in 1995 to 220 in 2007, a decline of 36 percent, and marginally increased to 227 in 2010. To help deal with this disruption, the Austrian Ministry of Agriculture started various promotional initiatives with the food industry and the retail sector. These initiatives emphasize local origin, uniqueness of local ingredients, environmental friendly, sustainable and organic production. Numerous labels and trademarks have been created to enforce those criteria.



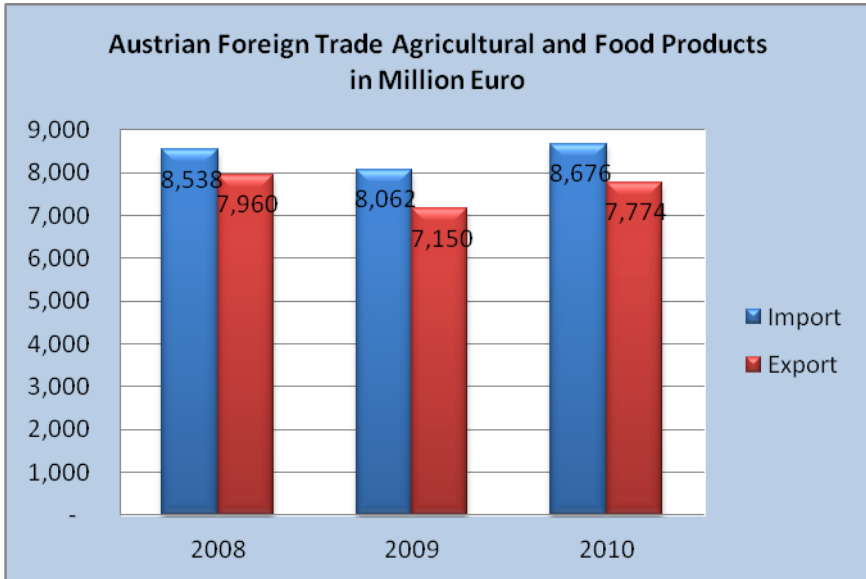
Source: Fachverband der Lebensmittelindustrie

Sales of the food processing sector increased steadily until 2008. Starting in 2009, sales were affected by the global economic down-turn and fell to Euro 7 billion in 2010.



Source: Fachverband der Lebensmittelindustrie

Within the last ten years, the number of employees in the Austrian food processing sector decreased by almost 9 percent, to below 27,000.



Source: Fachverband der Lebensmittelindustrie

In 2010, Austria imported Euro 8.7 billion worth of agricultural products. Exports accounted for Euro 7.8 billion.



Source: Fachverband der Lebensmittelindustrie

45 percent of total agricultural imports and 59 percent of total agricultural exports were processed food products. The Austrian food processing sector exported Euro 4.5 billion in 2010, which represents an increase of 9 percent by value compared to the previous year.

Advantages	Challenges
Austria has a strategic location within the Central European region; processed products can be re-exported to approximately 50 million people in surrounding countries.	The food processing industry in Austria and the surrounding Central European countries underwent a severe concentration process with the result that individual countries concentrate on specific segments and/or products for processing. This market concentration represents a big challenge for U.S. exporters to find the appropriate processor.
Austrians have one of the highest living standards in the EU. Austrians are affluent customers, used to high quality products and are environmental and health conscious in their food selection. There is demand for sustainable, organic, innovative, healthy and low calorie products.	Foods containing or made from biotech products are not accepted by consumers and retailers. Products must meet strict Austrian/EU/retailer requirements. High competition from other EU suppliers.
Good infrastructure and network of experienced agents, importers and consolidators helps to get products into the market.	Because Austria is a relatively small country many products are imported and processed through other EU importers and processors.
A strong and growing tourism sector within and outside of Austria stimulates the demand for U.S. products; e.g. U.S. beef, ethnic foods, organic snacks.	EU labeling, traceability, and packaging laws inhibit the import of some U.S. products, which have a high market potential e.g. U.S. beef and poultry.

Section II. Road Map for Market Entry

A. Entry Strategy

In general terms, U.S. exporters who are already exporting to other EU countries will likely be meeting most of the requirements for exporting to Austria.

In order to be successful on the Austrian food processing market an exporter should conduct the following steps:

- **Carry out a thorough marketing research to assess the market potential**

Tools:

FAS Attaché Reports (products, sector specific reports): e.g. Exporter Guide, Food Retail Report
All reports can be found at: <http://www.usda-mideurope.com/> or
<http://gain.fas.usda.gov/Pages/Default.aspx>

Contact State Regional Trade Groups and/ or U.S. Cooperators to obtain market access support. STRG's and/or Cooperator groups use trade shows, trade missions and tailor made market research to assist importers.

Contact FAS Vienna office to discuss method and market entry strategy.

- **Find an agent, importer wholesaler, distributor** who can assist with information on import requirements, phytosanitary and sanitary regulations, labeling requirements and competition.

Tools:

Contact FAS Vienna office for market knowledge and Foreign Buyer Lists.

- **Ensure regular product supply**

Tools:

Sales to Austria might be in small volume. Exporter should request a consolidator address list from FAS Washington in order to reduce shipping costs.

Check the American Foods in Europe Directory which lists all European buyers of U.S. products.
<http://www.american-foods.org/>

Attend a trade show to test the product on the market. For upcoming trade shows in the region, see:
<http://www.usda-mideurope.com/text.php?id=7>

For import requirements please refer to the latest Austrian and EU FAIRS reports and the EU Certification Guide:

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

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative_Brussels%20USEU_EU-27_12-21-2010.pdf

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

The Foreign Agricultural Service

The USDA Foreign Agricultural Service in Vienna can be contacted for assistance with questions regarding the Austrian market, trade shows and marketing or sales opportunities in Austria.

Contact information for FAS Vienna can be found at the end of this report.

State Regional Trade Groups

The State Regional Trade Groups (SRTG) are regionally located in the U.S. and non-profit trade development organizations which help U.S. food producers and processors sell their products overseas. They are funded by USDA's Foreign Agricultural Service (FAS), the State Departments of Agriculture and the private industry.

These groups carry out promotional activities in order to increase exports of U.S. high-value food and agricultural products. Activities include participation in international trade exhibitions, overseas trade missions, reverse trade missions, export education, in-country research, and point-of-sale promotions in foreign food chains and restaurants in markets around the world.

The SRTGs also administer a cost-share funding program called the Brand program, which supports the promotion of brand name food and agricultural products in overseas markets. For more information, contact the state regional trade group responsible for your state:

Food Export USA - Northeast

Member states: Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont

Email: info@foodexport.org

Website: www.foodexportusa.org

Food Export Association of the Midwest USA

Member states: Indiana, Illinois, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin

Email: info@foodexport.org

Website: www.foodexport.org

Southern United States Trade Association

Member states: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas, Virginia, West Virginia

Email: susta@susta.org

Website: www.susta.org

Western U.S. Agricultural Trade Association

Member states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming

Email: export@wusata.org

Website: www.wusata.org

Participation in Trade Shows

Food Processing Ingredients Austria

Austria has only one major food trade show “Alles für den Gast”. This show is held twice a year in Salzburg. In addition, all major Austrian traders, importers and food processors will attend the large product specific trade shows held in Germany and France.

ANUGA in Germany alternating with SIAL in Paris are the most important food trade shows in Europe and the best place for U.S. exporters to make contact with potential business partners. New food trends and latest developments in the food industry can be observed at these shows. These shows are catered to an international crowd, giving exporters access to a wide selection of interested buyers from around the world.

ISM (International Sweets and Biscuit Show)

Cologne, Germany

The largest confectionery trade show worldwide catering to an international crowd.

No USA pavilion present. Takes place annually in January/February.

Next show: January 29 to February 1, 2012

www.ism-cologne.com

Pro Sweets

Cologne, Germany

Takes place simultaneously with ISM (see above). The show focuses on confectionery ingredients.

No USA pavilion present. Annually except when the show Interpack is held.

Next show: January 29 - February 1, 2012

www.prosweets-cologne.com

Fruit Logistica

Berlin, Germany

Europe's largest trade show for fresh produce, dried fruits and nuts; catering to an international crowd.

USA pavilion present. Takes place annually in January.

Next show: February 9 - 11, 2011

www.fruitlogistica.com

BioFach

Nuremberg, Germany

The world's largest trade show for organic products catering to an international crowd.

USA pavilion present. Takes place annually in February.

Next show: February 15 - 18, 2012

www.biofach.de

European Seafood Exposition

Brussels, Belgium

The world's largest seafood trade show catering to an international crowd.

USA pavilion present. Takes place annually in April.

Next show: April 24 – 26, 2012

www.euroseafood.com

Interzoo

Nuremberg, Germany

The world's largest trade show for pet and pet food supplies catering to an international crowd.

No USA pavilion present. Takes place every two years in May.

Next show: May 17 – 20, 2012

www.interzoo.com

Vitafoods Europe

Geneva, Switzerland

Trade show for nutraceuticals, functional foods and functional drinks catering to an international crowd.
USA pavilion present. Takes place annually in May.
Next show: May 22 – 24, 2012
www.vitafoods.eu.com

SIAL

Paris, France
Europe's second largest trade show (5.300+ exhibitors) for food & beverages, catering to an international crowd.
USA pavilion present. Takes place every two years in October.
Next show: October 21-25, 2012
<http://www.sialparis.com>

Health Ingredients Europe (Hi Europe)

Frankfurt, Germany
The leading global trade show for food and beverage innovation, ingredients and solutions for food and drink formulation, dietary supplements, nutraceuticals and personal care products.
USA pavilion present. Takes place every two years in November.
Next show: November 13 – 15, 2012
hieurope.ingredientsnetwork.com

International Food & Drink Exhibition (IFE London)

London, United Kingdom
The UK's largest food and beverage trade show.
USA pavilion present. Takes place every two years in March.
Next show: March 17 - 20, 2013
www.ife.co.uk

ANUGA

Cologne, Germany
The world's largest trade show (6.500+ exhibitors) for food & beverages catering to an international crowd.
USA pavilion present. Takes place every two years in October.
Next show: October 5 – 9, 2013
www.anuga.com

Food Ingredients Europe (Fi Europe)

Frankfurt, Germany
Trade show for the food ingredients industry.
USA pavilion present. Takes place every two years in November.
Next show: November 19 – 21, 2012
fieurope.ingredientsnetwork.com

Information on all USDA sponsored trade shows can be found under:
www.fas.usda.gov/agx/trade_events/trade_events.asp

B. Market Structure

Austria has a small but highly developed market economy and a high standard of living with a population of 8.3 million. It occupies a strategic position in the center of Western Europe and is closely tied to other EU

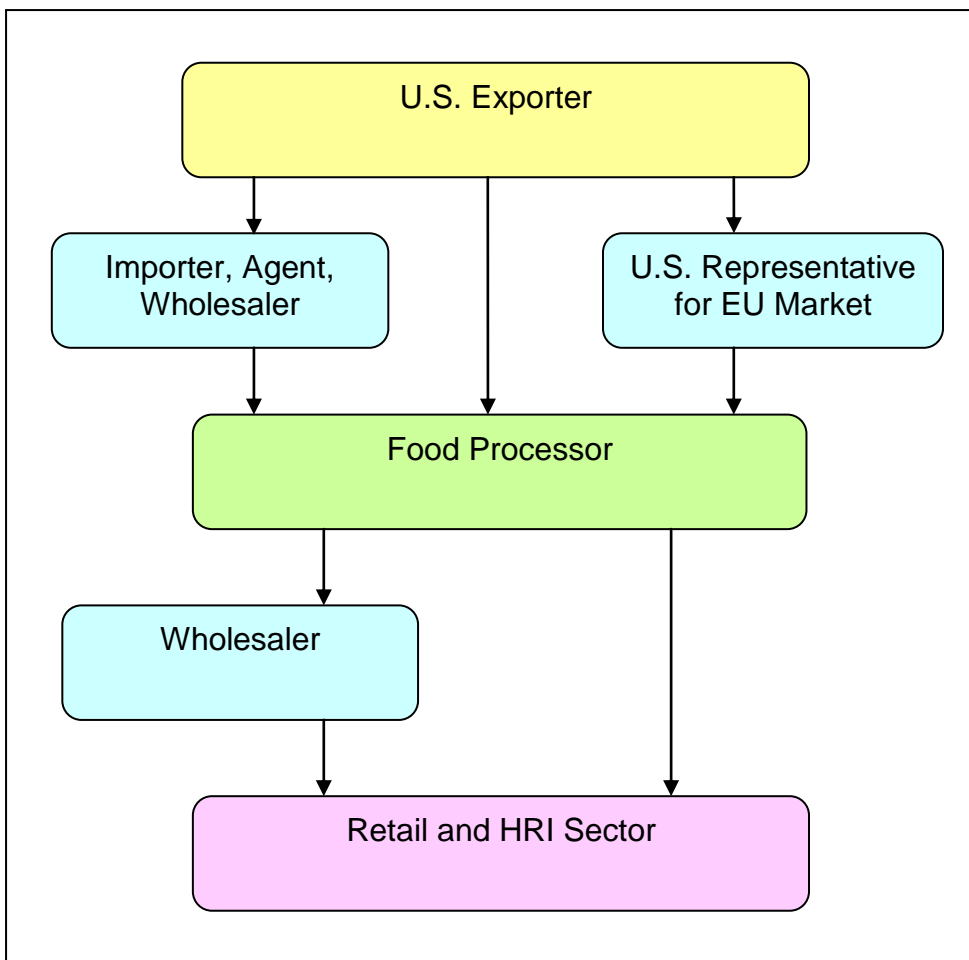
economies, especially Germany's. Austria is a part of the EU single market and customs union. International trade negotiations for all EU members are conducted by the European Commission (EC). The Austrian economy is characterized by a large service sector, a sound industrial sector, and a small, but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

The Austrian food processing market is relatively small and food processors generally source their products through importers/traders or wholesalers from other EU importers. This is especially important for a U.S. exporter when looking at the Austrian food processing sector.

Large importers in either Germany or The Netherlands work with Austrian agents or wholesalers to distribute the products to the different food processing facilities. U.S. exporter already exporting to other EU members will likely be meeting most of the requirements for exporting to Austria.

The structure and relative small size of the Austrian food processing sector requires only a small number of traders, importers or agents for sourcing products. Only large processors will buy directly from foreign suppliers.

Globalization and concentration in the European food processing sector and in particular in Austria has reduced the number of food processors. A typical Austrian food processor exports a high share of its production to other EU countries. This constitutes an excellent opportunity for U.S. food exporters supplying his product to an Austrian food processor. For example supplying bulk products to a large snack food processor in Austria means these products will end up on the shelves of many European retail stores.



C. Company Profiles

The following table includes a selection of food processors in Austria, sorted by the types of products and sales.

Product Type	Company	Sales Euro Million / 2009 ¹⁾	End-Use Channels	Production Location	Procurement Channels
Meat	Radatz Feine Wiener Fleischwaren Gesellschaft m.b.H.	131	Wholesaler, Retailer, HRI	Vienna	Local products
Meat	Handl Tyrol GmbH	92	Wholesaler, Retailer, HRI	Pians	Local products, Imports
Meat	Greisinger Fleisch- Wurst- u Selchwarenerzeugung GmbH	90	Wholesaler, Retailer, HRI	Muenzbach	Local products, Imports
Meat	Landena KG d Landgenossenschaft Ennstal	88	Wholesaler, Retailer, HRI	Stainach	Local products, Imports
Meat	Hochreiter Fleischwaren GmbH	73	Wholesaler, Retailer, HRI	Bad Leonfelden	Local products, Imports
Meat	Schirnhofner GesmbH	67	Wholesaler, Retailer, HRI	Kaindorf	Local products, Imports
Meat	Wiesbauer Österreichische Wurstspezialitäten GmbH	65	Wholesaler, Retailer, HRI	Wien	Local products, Imports
Poultry Meat	Hubers Landhendl GmbH	180	Wholesaler, Retailer, HRI	Pfaffstaett	Local products
Poultry Meat	Wech-Geflügel GmbH	56	Wholesaler, Retailer, HRI	Kolleg	Local products
Dairy	Berlandmilch regGenmbH	690	Wholesaler, Retailer, HRI	Wels	Local products, Imports
Dairy	NOeM AG	373	Wholesaler, Retailer, HRI	Baden	Local products, Imports
Dairy	Gmundner Molkerei regGenmbH	180	Wholesaler, Retailer, HRI	Gmunden	Local products
Dairy	Tirol Milch regGenmbH	140	Wholesaler, Retailer, HRI	Woergl	Local products
Fish & Seafood	Eisvogel Hubert Bernegger GmbH & Co KG	15	Wholesaler, Retailer, HRI, Consumer	Molln	Local products
Fish & Seafood	ELFIN Feinkost GmbH	11	Wholesaler, Retailer, HRI	Leonding	Local products
Fish & Seafood	Kulmerfisch GmbH - Fischverarbeitung	5	Wholesaler, HRI, Consumer	Haslau bei Birkfeld	Local products

Fish & Seafood	Cerny's Fisch&Feinkost	n/a	Wholesaler, HRI, Consumer	Guns-kirchen	Local products, Imports
Non-Alcoholic Beverages	Rauch Fruchtsäfte GmbH & Co	400	Wholesaler, Retailer	Rankweil	Local Products, Imports
Non-Alcoholic Beverages	Coca-Cola HBC Austria GmbH	330	Wholesaler, Retailer, HRI	Wien	Local Products, Imports
Non-Alcoholic Beverages	S. Spitz Gesellschaft mbH	225	Wholesaler, Retailer	Linz	Local Products, Imports
Non-Alcoholic Beverages	Pfanner Hermann Getränke GmbH	200	Wholesaler, Retailer	Lauterach	Local Products, Imports
Non-Alcoholic Beverages	Ybbstaler Fruit Austria GmbH	120	Wholesaler, Retailer	Kroellendorf	Local Products, Imports
Alcoholic Beverages	Brau Union Österreich AG	606	Wholesaler, Retailer, HRI	Linz	Local Products, Imports
Alcoholic Beverages	Schlumberger Wein- u Sektellerei GmbH	115	Wholesaler, Retailer, HRI	Wien	Local Products, Imports
Alcoholic Beverages	Stieglbrauerei zu Salzburg GmbH	61	Wholesaler, Retailer, HRI	Salzburg	Local Products, Imports
Baked Goods	Ölz Rudolf Meisterbäcker GmbH	174	Wholesaler, Retailer, HRI	Dornbirn	Local Products, Imports
Baked Goods	Ankerbrot AG	73	Wholesaler, Retailer, HRI	Wien	Local Products, Imports
Prepared Fruit, Vegetable, Products	Url F & Co GesmbH	61	Wholesaler, Retailer, HRI	Unterprenstaetten	Local Products, Imports
Prepared Fruit, Vegetable, Products	Felix Austria GesmbH	39	Wholesaler, Retailer, HRI	Mattersburg	Local Products, Imports
Confectionary Products	Manner Josef & Comp AG	168	Wholesaler, Retailer, HRI	Wien	Local Products, Imports
Confectionary Products	Haribo Lakritzen Hans Riegel BetriebsgesmbH	56	Wholesaler, Retailer, HRI	Linz	Local Products, Imports
Confectionary Products	Lindt & Sprüngli (Austria) GesmbH	53	Wholesaler, Retailer, HRI	Wien	Local Products, Imports
Confectionary Products	Kraft Foods Österreich GmbH	50	Wholesaler, Retailer, HRI	Bludenz	Local Products, Imports
Snack Foods	Kelly GesmbH	100	Wholesaler,	Wien	Local

	Snackhersteller		Retailer, HRI		Products, Imports
Pet Foods	Mars Austria OG	330	Wholesaler, Retailer, HRI	Bruck / Leitha	Local Products, Imports
Pet Foods	PRO PET AUSTRIA Heimtiernahrung GmbH	12	Wholesaler, Retailer, HRI	Pucking	Local Products, Imports
Prepared Meals (Mixed Ingredients)	Unilever Austria GmbH	300	Wholesaler, Retailer, HRI	Wien	Wholesaler, Retailer, HRI
Dried Goods and Condiments, Spices	Almi Ges.m.b.H. & Co KG	70	Wholesaler, Retailer, HRI	Offering	Wholesaler, Retailer, HRI
Dried Goods and Condiments, Spices	KOTANYI GmbH	70	Wholesaler, Retailer, HRI	Wolkersdorf	Wholesaler, Retailer, HRI
Dried Goods and Condiments, Spices	Wiberg GesmbH	69	Wholesaler, Retailer, HRI	Salzburg	Wholesaler, Retailer, HRI
Dried Fruits & Nuts		95	Wholesaler, Retailer, HRI	Wiener Neudorf	Wholesaler, Retailer, HRI
Dried Fruits & Nuts	VOG Einfuhr u Großhandel m Lebensmittel u Bedarfsgüter AG	12	Wholesaler, Retailer, HRI	Linz	Wholesaler, Retailer, HRI

1) Source: Herold Marketing CD

D. Sector Trends

In contrary to the traditional Austrian diet which is based on pork, flour, and vegetables 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 and zero sugar food and beverages 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.

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 many retail chains started launching private labels promoting “sustainability”.

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.

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.

Section III. Competition

Product Category Imports 2010 ²⁾	Major Supply Sources in 2010 Market Share ²⁾	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Tree Nuts Total Imports: 95 million US\$ 16 thousand MT	Italy: 22% United States: 15% Germany: 14% Turkey: 13%	The United States is the second largest supplier for tree nuts and within this category the major supplier for almonds.	Only little local supply available.
Fish & Seafood Total Imports: 397 million US\$ 58 thousand MT	Germany: 43% Netherlands: 10% United States: 1%	Germany and The Netherlands function mostly as ports of entry and countries for transshipment.	Only fresh water fish locally available.
Fruit and Vegetable Juices Total Imports: 298 million US\$ 163 thousand MT	Germany: 17% Poland: 16% Italy: 14% USA: 1%	Germany and Poland have market advantages due to proximity and large local juice industry.	Local production of fruit juices and non-alcoholic beverages is the second most important food processing sector in Austria. Austria is a large exporter of fruit juices.
Pet Food Total	Germany: 54% Liechtenstein:	Germany and Liechtenstein function as country of	A large local producer is dominating (about 50% of the Austrian market)

Imports: 166 million US\$ 107 thousand MT	14% USA: 2%	transshipment. Product might origin from the USA or other countries.	the local market.
Wine Total Imports: 232 million US\$ 81 thousand MT	Italy: 47% France: 26% Germany: 10% USA: 1.5%	Italy and France have advantages through proximity and similar taste.	Locally produces wine has a market share of about 80%. Consumers have a strong preference for local wine.

2) Source: Global Trade Atlas

Section IV. Best Products Prospects

Category A: Products Present in the Market That Have Good Sales Potential

- Tree nuts, such as almonds, walnuts, and hazelnuts
- Wine
- Pet foods
- Processed fruits and vegetables
- Fruit juices
- Snack foods
- Health food
- Organic food
- Sustainable food products
- Convenience food, ready meals
- Non-biotech products

Category B: Products not present in Sufficient Quantities but That Have Good Sales Potential

- Cranberries and cranberry products (jam, juice)
- Pecans, macadamia
- Seafood and seafood products
- Hormone free high quality beef
- Game and exotic meat

Category C: Products not Present because They Face Significant Barriers

- Beef and beef preparations from cattle raised with growth promoters (hormone ban)
- Poultry (chlorine sanitized poultry may not enter the EU)

SECTION V POST CONTACT AND FURTHER INFORMATION

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