



MARKET ACCESS SECRETARIAT  
Global Analysis Report

# Competitive Trade Analysis

## Austria

June 2016



### REPORT CONTENT SUMMARY

- This report looks to highlight the major sectors in Austria, and attempts to identify the best opportunities for Canadian exports.
- Specifically, the data analysis that follows focuses on the top ten Austrian imports by major aggregate sector, of which Canada is a supplier. It identifies the gap between Austria's imports from the world and the proportion provided by Canada, and then outlines top international competitors.
- Unless otherwise specified, all figures in this document are based on import data as reported by Statistik Austria, and were sourced from Global Trade Atlas (2015).

### AUSTRIAN MARKET SUMMARY

- In 2014, Austria was the 23<sup>rd</sup>-largest importer of agri-food and seafood products in the world, and the 11<sup>th</sup>-largest among members of the European Union (EU) with just over C\$14.8 billion in 2014. Austria is also the world's 27<sup>th</sup>-largest agri-food and seafood exporter (11<sup>th</sup>-largest in the EU) with C\$13.2 billion in exports. However their C\$1.6 billion trade deficit in 2014, highlights the country's dependency for agri-food and seafood imports.
- Austria's top agri-food and seafood trading partners include Germany with 36.7% of total import value, Italy (11%), and the Netherlands (6.9%). Canada was Austria's 40<sup>th</sup>-largest import provider in 2014, representing C\$20.2 million, or just 0.02% of the market.

**Note:** Please see the Annex at the end of this document for a list of abbreviations that will be used throughout this report.

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## TRADE OVERVIEW

Austria sources a diverse range of agri-food and seafood products from 189 international suppliers. Key import commodities include meat and edible offal (8.5% of total imports), baking related goods and pasta (7.6%), and edible fruit and nuts (7.5%). The top three supplying countries of overall agri-food and seafood imports are Germany, Italy and the Netherlands. Canada is ranked 45<sup>th</sup> among supplying countries to Austria, and registered a compound annual growth rate (CAGR) of 13.5% from 2010-14.

### Austria's Top Ten Suppliers of Agri-Food and Seafood Products, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>12,172.55</b>	<b>13,677.50</b>	<b>13,396.62</b>	<b>14,802.87</b>	<b>16,210.63</b>	<b>7.42</b>
1 Germany	4,642.51	5,033.33	4,885.19	5,463.53	5,951.06	6.40
2 Italy	1,375.94	1,536.60	1,524.76	1,661.94	1,783.61	6.70
3 Netherlands	1,185.41	1,182.44	954.73	997.00	1,113.27	-1.56
4 Hungary	581.45	745.39	774.21	846.73	931.15	12.49
5 Switzerland	342.20	379.55	365.52	500.08	574.72	13.84
6 Czech Republic	349.75	386.56	378.86	454.48	565.31	12.75
7 France	382.72	481.78	493.56	517.18	555.11	9.74
8 Poland	345.27	468.31	638.06	513.37	551.58	12.42
9 Spain	364.77	376.78	414.15	466.34	507.20	8.59
10 Slovakia	224.44	245.13	242.71	366.26	378.04	13.92
45 Canada	12.15	65.80	21.41	14.88	20.15	13.49

### Austria's Top Ten Suppliers of Agri-Food and Seafood Products, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
1 Germany	38.14	36.80	36.47	36.91	36.71	-1.43
2 Italy	11.30	11.23	11.38	11.23	11.00	-0.30
3 Netherlands	9.74	8.65	7.13	6.74	6.87	-2.87
4 Hungary	4.78	5.45	5.78	5.72	5.74	0.96
5 Switzerland	2.81	2.77	2.73	3.38	3.55	0.74
6 Czech Republic	2.87	2.83	2.83	3.07	3.49	0.62
7 France	3.14	3.52	3.68	3.49	3.42	0.28
8 Poland	2.84	3.42	4.76	3.47	3.40	0.56
9 Spain	3.00	2.75	3.09	3.15	3.13	0.13
10 Slovakia	1.84	1.79	1.81	2.47	2.33	0.49
45 Canada	0.10	0.48	0.16	0.10	0.12	0.02

### Agri-Food and Seafood Products Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	12,172.55	13,677.50	13,396.62	14,802.87	16,210.63	7.42
Austria's imports from Canada	12.15	65.80	21.41	14.88	20.15	13.49
Supply gap	12,160.41	13,611.70	13,375.21	14,787.99	16,190.48	7.42



Meat and edible offal represented Austria's top-grossing import commodity in 2014, with a value of over C\$1.0 billion, or 8.6% of overall agri-food and seafood imports. Across the 2010 to 2014 period, 9 of the top 10 categories had a compound annual growth rate (CAGR) over 5.5%. The categories of food waste and animal feed, and dairy, eggs and honey, were the strongest growing commodities over the periods, with CAGRs of 18.6% and 9.7%.

**Austria's Top Ten Agri-Food and Seafood Commodity Imports from the World,  
C\$ Millions**

Rank	HS Code	Commodity	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>Total agri-food and seafood imports</b>			<b>12,172.55</b>	<b>13,677.50</b>	<b>13,396.62</b>	<b>14,802.87</b>	<b>16,210.63</b>	<b>7.42</b>
1	02	Meat and edible offal	1,016.64	1,143.68	1,126.78	1,200.89	1,389.41	8.12
2	19	Baking related goods and pasta	903.07	988.54	979.46	1,080.09	1,228.27	7.99
3	08	Edible fruit and nuts	959.86	997.42	974.58	1,125.96	1,209.27	5.94
4	04	Dairy, eggs and honey	831.32	909.03	913.35	1,023.42	1,205.68	9.74
5	20	Preserved foods	747.69	833.61	906.07	932.09	1,008.60	7.77
6	21	Miscellaneous edible preparations	754.71	838.15	846.45	930.04	987.16	6.94
7	23	Food waste and animal feed	483.83	548.72	638.68	849.05	955.83	18.56
8	22	Beverages	690.32	776.35	751.75	837.90	935.28	7.89
9	18	Cocoa and cocoa preparations	525.24	548.87	539.66	629.53	726.64	8.45
10	07	Edible vegetables	665.46	627.56	596.41	663.01	706.93	1.52



## TOP TEN AGRI-FOOD AND SEAFOOD COMMODITY IMPORTS

### 1. MEAT AND EDIBLE OFFAL

Austria's Top Ten Suppliers of Meat and Edible Offal, C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>1,016.64</b>	<b>1,143.68</b>	<b>1,126.78</b>	<b>1,200.89</b>	<b>1,389.41</b>	<b>8.12</b>
Germany	583.59	671.61	654.05	687.78	781.11	7.56
Hungary	101.68	110.85	114.69	119.82	137.58	7.85
Italy	84.31	81.48	83.84	94.54	107.07	6.16
Netherlands	77.69	79.48	78.43	78.46	89.39	3.57
Poland	34.29	44.99	29.30	35.14	53.86	11.95
France	16.64	22.44	30.00	31.61	39.60	24.21
Slovenia	13.86	16.26	15.77	18.60	25.17	16.08
Brazil	23.47	23.24	21.46	23.37	23.92	0.48
Spain	8.08	12.97	15.18	16.56	19.19	24.13
Argentina	8.03	9.57	10.69	15.50	17.25	21.07
(36) Canada	0.02	0.14	0.22	0.13	0.07	34.08

Austria's Top Ten Suppliers of Meat and Edible Offal, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	57.40	58.72	58.05	57.27	56.22	-1.18
Hungary	10.00	9.69	10.18	9.98	9.90	-0.10
Italy	8.29	7.12	7.44	7.87	7.71	-0.58
Netherlands	7.64	6.95	6.96	6.53	6.43	-1.21
Poland	3.37	3.93	2.60	2.93	3.88	0.51
France	1.64	1.96	2.66	2.63	2.85	1.21
Slovenia	1.36	1.42	1.40	1.55	1.81	0.45
Brazil	2.31	2.03	1.90	1.95	1.72	-0.59
Spain	0.79	1.13	1.35	1.38	1.38	0.59
Argentina	0.79	0.84	0.95	1.29	1.24	0.45
(36) Canada	0.00	0.01	0.02	0.01	0.01	0.01



**Meat and Edible Offal Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	1,016.64	1,143.68	1,126.78	1,200.89	1,389.41	8.12
Austria's imports from Canada	0.02	0.14	0.22	0.13	0.07	34.08
Supply gap	1,016.61	1,143.54	1,126.56	1,200.75	1,389.33	8.12

**Austria's Top Five Meat and Edible Offal Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
020319	Fresh boneless pork	211.59	237.69	282.05	15.46
020726	Fresh turkey cuts and edible offal	173.54	188.31	209.09	9.76
020311	Fresh pork carcasses and half carcasses	111.22	117.11	148.17	15.42
020130	Fresh boneless beef	110.69	115.71	135.59	10.68
020713	Fresh chicken cuts and edible offal	85.95	96.38	105.65	10.87

**Austria's Top Meat and Edible Offal Product Imports  
and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
020319	Fresh boneless pork	Germany 74.00	France 7.38	Poland 5.72	0.01
020726	Fresh turkey cuts and edible offal	Germany 65.13	Hungary 20.10	Italy 8.13	N/A
020311	Fresh pork carcasses and half carcasses	Germany 96.86	Hungary 1.24	Italy 0.96	N/A
020130	Fresh boneless beef	Germany 39.93	Netherlands 12.98	Argentina 12.25	0.01
020713	Fresh chicken cuts and edible offal	Hungary 31.88	Germany 28.28	Slovenia 13.85	N/A



## 2. BAKING RELATED GOODS AND PASTA

**Austria's Top Ten Suppliers of Baking Related Goods and Pasta, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>903.07</b>	<b>988.54</b>	<b>979.46</b>	<b>1,080.09</b>	<b>1,228.27</b>	<b>7.99</b>
Germany	553.21	573.80	571.80	622.68	730.85	7.21
Italy	112.34	128.05	131.16	138.74	134.57	4.62
France	35.86	47.21	46.54	47.05	57.54	12.55
Switzerland	39.60	47.73	43.24	51.11	54.96	8.54
Belgium	30.20	31.61	25.66	34.51	40.66	7.72
Hungary	29.60	30.01	28.06	33.50	38.12	6.53
Poland	19.73	27.45	29.48	34.72	36.22	16.41
Netherlands	30.15	32.54	29.51	32.09	35.58	4.23
Czech Republic	12.12	17.19	14.43	16.00	16.42	7.89
United Kingdom	10.88	12.48	13.84	16.39	15.98	10.09
(52) Canada	0.00	0.00	0.00	0.00	0.01	125.07

**Austria's Top Ten Suppliers of Baking Related Goods and Pasta, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	61.26	58.05	58.38	57.65	59.50	-1.76
Italy	12.44	12.95	13.39	12.85	10.96	-1.48
France	3.97	4.78	4.75	4.36	4.68	0.71
Switzerland	4.39	4.83	4.41	4.73	4.47	0.08
Belgium	3.34	3.20	2.62	3.20	3.31	-0.03
Hungary	3.28	3.04	2.87	3.10	3.10	-0.18
Poland	2.18	2.78	3.01	3.21	2.95	0.77
Netherlands	3.34	3.29	3.01	2.97	2.90	-0.44
Czech Republic	1.34	1.74	1.47	1.48	1.34	0.00
United Kingdom	1.20	1.26	1.41	1.52	1.30	0.10
(52) Canada	0.00	0.00	0.00	0.00	0.00	0.00

**Baking Related Goods and Pasta Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	903.07	988.54	979.46	1,080.09	1,228.27	7.99
Austria's imports from Canada	0.00	0.00	0.00	0.00	0.01	125.07
Supply gap	903.07	988.54	979.46	1,080.09	1,228.26	7.99



**Austria's Top Five Baking Related Goods and Pasta Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
190590	Bread, pastry, cakes and pudding	439.42	468.80	521.91	8.98
190531	Cookies (Sweet biscuits)	125.13	147.34	158.47	12.53
190120	Mixes and dough for preparation of bakers wares	50.72	53.73	70.14	17.60
190532	Waffles and wafers	46.56	56.97	68.11	20.95
190190	Malt extract, flour, meal and milk	52.06	56.42	64.45	11.27

**Austria's Top Five Baking Related Goods and Pasta Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's Share
		1	2	3	
190590	Bread, pastry, cakes and pudding	Germany 64.03	Italy 10.14	France 6.10	N/C
190531	Cookies (Sweet biscuits)	Germany 54.13	Poland 8.46	Netherlands 7.32	N/A
190120	Mixes and dough for preparation of bakers wares	Germany 60.12	France 12.83	United Kingdom 9.24	N/A
190532	Waffles and wafers	Germany 46.40	Poland 15.90	Belgium 10.51	N/A
190190	Malt extract, flour, meal and milk	Germany 77.66	Czech Republic 6.03	Switzerland 4.04	N/A



### 3. EDIBLE FRUIT AND NUTS

**Austria's Top Ten Suppliers of Edible Fruit and Nuts, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>959.86</b>	<b>997.42</b>	<b>974.58</b>	<b>1,125.96</b>	<b>1,209.27</b>	<b>5.94</b>
Spain	151.41	144.74	169.83	192.23	206.06	8.01
Italy	180.18	194.16	182.17	198.16	192.06	1.61
Germany	105.91	104.66	105.68	110.96	106.92	0.24
Turkey	41.59	39.65	43.88	74.84	94.08	22.64
Ecuador	35.89	46.05	52.27	64.46	65.47	16.21
Serbia	33.08	39.85	25.13	35.30	48.50	10.04
Costa Rica	63.74	57.23	47.50	30.06	41.59	-10.12
South Africa	42.27	31.50	29.37	33.37	36.33	-3.71
Netherlands	20.83	26.62	26.22	25.53	33.72	12.80
Chile	18.15	23.00	22.94	28.25	33.19	16.29
(55) Canada	1.02	2.13	2.92	1.82	1.74	14.17

**Austria's Top Ten Suppliers of Edible Fruit and Nuts, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Spain	15.77	14.51	17.43	17.07	17.04	1.27
Italy	18.77	19.47	18.69	17.60	15.88	-2.89
Germany	11.03	10.49	10.84	9.85	8.84	-2.19
Turkey	4.33	3.98	4.50	6.65	7.78	3.45
Ecuador	3.74	4.62	5.36	5.72	5.41	1.67
Serbia	3.45	4.00	2.58	3.13	4.01	0.56
Costa Rica	6.64	5.74	4.87	2.67	3.44	-3.20
South Africa	4.40	3.16	3.01	2.96	3.00	-1.40
Netherlands	2.17	2.67	2.69	2.27	2.79	0.62
Chile	1.89	2.31	2.35	2.51	2.74	0.85
(55) Canada	0.11	0.21	0.30	0.16	0.14	0.03

**Edible Fruit and Nuts Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	959.86	997.42	974.58	1,125.96	1,209.27	5.94
Austria's imports from Canada	1.02	2.13	2.92	1.82	1.74	14.17
Supply gap	958.83	995.29	971.66	1,124.13	1,207.54	5.93





**Austria's Top Five Edible Fruit and Nut Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
080390	Fresh bananas	122.34	131.35	142.53	7.94
080610	Fresh grapes	78.25	85.41	83.13	3.07
081190	Frozen fruit and nuts	57.16	62.52	60.87	3.20
080520	Fresh mandarins	49.56	53.59	59.15	9.24
081010	Fresh strawberries	59.69	52.28	53.90	-4.97

**Austria's Top Five Edible Fruit and Nut Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
080390	Fresh bananas	Ecuador 45.74	Colombia 18.41	Costa Rica 17.03	N/A
080610	Fresh grapes	Italy 37.52	South Africa 17.28	Germany 8.03	N/A
081190	Frozen fruit and nuts	Serbia 17.23	Hungary 13.73	Poland 10.33	1.42
080520	Fresh mandarins	Spain 70.15	Italy 11.77	Turkey 6.91	N/A
081010	Fresh strawberries	Spain 44.73	Italy 24.39	Germany 20.47	N/A



#### 4. DAIRY, EGGS AND HONEY

**Austria's Top Ten Suppliers of Dairy, Eggs and Honey, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>831.32</b>	<b>909.03</b>	<b>913.35</b>	<b>1,023.42</b>	<b>1,205.68</b>	<b>9.74</b>
Germany	479.66	530.73	523.31	610.18	722.89	10.80
Italy	74.05	80.75	91.88	88.67	103.40	8.70
Netherlands	55.69	51.61	48.93	63.55	80.24	9.56
France	42.76	56.77	61.82	55.35	61.05	9.31
Greece	20.59	22.06	23.82	28.80	32.58	12.16
Denmark	13.31	20.88	18.21	23.79	28.24	20.69
Hungary	15.19	19.60	20.25	25.68	27.83	16.35
Switzerland	16.23	14.29	16.07	18.50	25.42	11.87
Poland	19.49	16.74	18.64	18.39	18.62	-1.13
Czech Republic	17.26	15.88	12.40	12.92	18.09	1.18
(58) Canada	0.51	0.09	0.00	0.00	0.00	-100.00

**Austria's Top Ten Suppliers of Dairy, Eggs and Honey, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	57.70	58.38	57.30	59.62	59.96	2.26
Italy	8.91	8.88	10.06	8.66	8.58	-0.33
Netherlands	6.70	5.68	5.36	6.21	6.66	-0.04
France	5.14	6.24	6.77	5.41	5.06	-0.08
Greece	2.48	2.43	2.61	2.81	2.70	0.22
Denmark	1.60	2.30	1.99	2.32	2.34	0.74
Hungary	1.83	2.16	2.22	2.51	2.31	0.48
Switzerland	1.95	1.57	1.76	1.81	2.11	0.16
Poland	2.34	1.84	2.04	1.80	1.54	-0.80
Czech Republic	2.08	1.75	1.36	1.26	1.50	-0.58
(58) Canada	0.06	0.01	0.00	0.00	0.00	-0.06

**Dairy, Eggs and Honey Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	831.32	909.03	913.35	1,023.42	1,205.68	9.74
Austria's imports from Canada	0.51	0.09	0.00	0.00	0.00	-100.00
Supply gap	830.81	908.93	913.35	1,023.42	1,205.68	9.76



**Austria's Top Five Dairy, Eggs and Honey Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
040690	Specialty cheese	356.44	381.34	457.74	13.32
040610	Fresh cheese and curd cheese	86.13	99.58	127.26	21.56
040510	Butter	52.17	74.71	80.06	23.88
040310	Yogurt	54.00	54.34	67.14	11.51
040210	Milk and cream, fat content <1.5%	35.38	54.52	64.50	35.03

**Austria's Top Five Dairy, Eggs and Honey Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
040690	Specialty cheese	Germany 51.87	Italy 11.85	Netherlands 8.76	N/A
040610	Fresh cheese and curd cheese	Germany 72.12	Italy 20.83	France 2.33	N/A
040510	Butter	Germany 67.82	Netherlands 12.93	Ireland 6.44	N/A
040310	Yogurt	Germany 50.81	Czech Republic 18.04	Greece 15.00	N/A
040210	Milk and cream, fat content <1.5%	Germany 70.73	Netherlands 15.12	Denmark 9.08	N/A



## 5. PRESERVED FOODS

**Austria's Top Ten Suppliers of Preserved Foods, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>747.69</b>	<b>833.61</b>	<b>906.07</b>	<b>932.09</b>	<b>1,008.60</b>	<b>7.77</b>
Germany	180.47	170.96	178.08	192.80	209.27	3.77
Italy	116.25	126.70	125.42	127.19	141.73	5.08
Netherlands	72.26	82.39	74.56	87.52	98.63	8.09
Turkey	65.33	66.03	71.96	81.71	96.72	10.31
Hungary	34.98	34.65	56.86	59.89	83.17	24.18
Poland	53.59	82.04	103.19	68.32	66.18	5.42
Brazil	36.00	41.60	41.62	43.60	39.09	2.08
Spain	15.57	22.61	25.08	26.33	27.44	15.21
Greece	15.74	16.81	18.64	22.21	25.23	12.52
Ukraine	12.47	7.24	8.22	9.26	24.64	18.55
(29) Canada	0.83	1.74	2.24	3.03	2.84	36.16

**Austria's Top Ten Suppliers of Preserved Foods, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	24.14	20.51	19.65	20.68	20.75	-3.39
Italy	15.55	15.20	13.84	13.65	14.05	-1.50
Netherlands	9.66	9.88	8.23	9.39	9.78	0.12
Turkey	8.74	7.92	7.94	8.77	9.59	0.85
Hungary	4.68	4.16	6.28	6.43	8.25	3.57
Poland	7.17	9.84	11.39	7.33	6.56	-0.61
Brazil	4.81	4.99	4.59	4.68	3.88	-0.93
Spain	2.08	2.71	2.77	2.83	2.72	0.64
Greece	2.10	2.02	2.06	2.38	2.50	0.40
Ukraine	1.67	0.87	0.91	0.99	2.44	0.77
(29) Canada	0.11	0.21	0.25	0.32	0.28	0.17

**Preserved Foods Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	747.69	833.61	906.07	932.09	1,008.60	7.77
Austria's imports from Canada	0.83	1.74	2.24	3.03	2.84	36.16
Supply gap	746.86	831.87	903.83	929.06	1,005.76	7.72



**Austria's Top Five Preserved Food Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
200819	Prepared nuts and seeds, excluding peanuts	117.62	126.98	150.71	13.20
200979	Apple juice	176.03	125.72	114.42	-19.38
200989	Juice of single fruits and vegetables	87.40	99.23	104.71	9.45
200410	Frozen French fries	29.82	33.48	40.19	16.08
200599	Vegetable and mix prepared	30.80	32.18	39.96	13.90

**Austria's Top Five Preserved Food Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
200819	Prepared nuts and seeds, excluding peanuts	Turkey 49.56	Germany 21.46	United Kingdom 13.49	N/A
200979	Apple juice	Hungary 32.25	Ukraine 20.18	Poland 15.46	N/A
200989	Juice of single fruits and vegetables	Poland 40.72	Hungary 12.03	Netherlands 11.34	0.26
200410	Frozen French fries	Netherlands 66.67	Germany 21.16	Belgium 8.88	N/A
200599	Vegetable and mix prepared	Italy 39.00	Germany 21.61	Netherlands 9.04	0.01



## 6. MISCELLANEOUS EDIBLE PREPARATIONS

**Austria's Top Ten Suppliers of Miscellaneous Edible Preparations, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>754.71</b>	<b>838.15</b>	<b>846.45</b>	<b>930.04</b>	<b>987.16</b>	<b>6.94</b>
Germany	427.76	461.76	466.76	529.07	543.32	6.16
Italy	39.83	38.52	44.71	44.91	53.40	7.60
Netherlands	41.95	43.64	41.03	50.10	49.61	4.28
Switzerland	49.74	51.03	43.08	45.80	47.16	-1.32
France	31.30	38.54	32.66	34.48	38.36	5.22
Hungary	26.69	28.17	33.92	29.37	32.73	5.23
Poland	22.26	24.05	25.70	26.50	29.97	7.72
Czech Republic	19.67	21.13	20.47	20.99	23.95	5.03
United Kingdom	12.77	17.41	19.60	17.43	21.80	14.29
United States	13.68	15.07	16.33	20.51	21.34	11.76
(35) Canada	0.18	0.24	0.23	0.37	0.88	49.14

**Austria's Top Ten Suppliers of Miscellaneous Edible Preparations, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	56.68	55.09	55.14	56.89	55.04	-1.64
Italy	5.28	4.60	5.28	4.83	5.41	0.13
Netherlands	5.56	5.21	4.85	5.39	5.03	-0.53
Switzerland	6.59	6.09	5.09	4.92	4.78	-1.81
France	4.15	4.60	3.86	3.71	3.89	-0.26
Hungary	3.54	3.36	4.01	3.16	3.32	-0.22
Poland	2.95	2.87	3.04	2.85	3.04	0.09
Czech Republic	2.61	2.52	2.42	2.26	2.43	-0.18
United Kingdom	1.69	2.08	2.32	1.87	2.21	0.52
United States	1.81	1.80	1.93	2.21	2.16	0.35
(35) Canada	0.02	0.03	0.03	0.04	0.09	0.07

**Miscellaneous Edible Preparation's Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	754.71	838.15	846.45	930.04	987.16	6.94
Austria's imports from Canada	0.18	0.24	0.23	0.37	0.88	49.14
Supply gap	754.53	837.91	846.22	929.66	986.28	6.93



**Austria's Top Five Miscellaneous Edible Preparations Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
210690	Food preparations	442.79	512.33	536.18	10.04
210390	Sauces, condiments and seasonings	113.74	130.88	134.39	8.70
210500	Ice cream and other edible ice	97.15	86.82	90.49	-3.49
210111	Coffee extracts and essences	60.04	62.66	66.04	4.88
210410	Soups and broths	37.40	34.85	36.72	-0.91

**Austria's Top Five Miscellaneous Edible Preparations Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
210690	Food preparations	Germany 57.81	Netherlands 6.59	Switzerland 4.85	0.11
210390	Sauces, condiments and seasonings	Germany 54.54	Croatia 8.33	Italy 7.64	0.00
210500	Ice cream and other edible ice	Germany 59.20	Italy 8.10	Belgium 6.72	N/A
210111	Coffee extracts and essences	Germany 61.18	United Kingdom 11.90	Switzerland 10.08	N/A
210410	Soups and broths	Germany 39.85	Hungary 25.03	Switzerland 9.64	N/A



## 7. FOOD WASTE AND ANIMAL FEED

**Austria's Top Ten Suppliers of Food Waste and Animal Feed, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>483.83</b>	<b>548.72</b>	<b>638.68</b>	<b>849.05</b>	<b>955.83</b>	<b>18.56</b>
Germany	212.53	231.17	254.23	311.33	369.73	14.85
Switzerland	3.51	3.54	55.04	133.42	167.99	163.06
Italy	48.68	67.60	58.29	94.86	117.39	24.61
Netherlands	48.27	60.49	61.70	62.32	57.07	4.28
Brazil	51.47	40.25	69.04	69.38	42.02	-4.94
France	24.41	34.15	29.61	37.29	39.67	12.91
Hungary	14.25	14.03	20.44	28.79	36.22	26.27
United Kingdom	4.13	9.20	7.30	8.72	16.17	40.65
Denmark	8.84	8.86	7.05	12.41	14.92	13.99
Liechtenstein	24.04	20.25	15.18	21.41	13.28	-13.79
(29) Canada	0.16	0.23	0.28	0.29	0.54	34.58

**Austria's Top Ten Suppliers of Food Waste and Animal Feed, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Ireland	43.93	42.13	39.81	36.67	38.68	-5.24
Germany	0.73	0.65	8.62	15.71	17.58	16.85
France	10.06	12.32	9.13	11.17	12.28	2.22
Italy	9.98	11.02	9.66	7.34	5.97	-4.01
Belgium	10.64	7.33	10.81	8.17	4.40	-6.24
Netherlands	5.04	6.22	4.64	4.39	4.15	-0.89
Spain	2.95	2.56	3.20	3.39	3.79	0.84
Poland	0.85	1.68	1.14	1.03	1.69	0.84
United States	1.83	1.62	1.10	1.46	1.56	-0.27
China	4.97	3.69	2.38	2.52	1.39	-3.58
(29) Canada	0.03	0.04	0.04	0.03	0.06	0.03

**Food Waste and Animal Feed Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	483.83	548.72	638.68	849.05	955.83	18.56
Austria's imports from Canada	0.16	0.23	0.28	0.29	0.54	34.58
Supply gap	483.66	548.49	638.40	848.76	955.29	18.55





**Austria's Top Five Food Waste and Animal Feed Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
230910	Dog and cat food, put up for retail	258.56	381.06	441.99	30.74
230400	Soymeal	222.98	273.76	286.06	13.27
230990	Prepared animal feed, except cat and dog food	94.98	112.88	139.21	21.07
230641	Canola seed oilcake	15.10	17.54	20.86	17.53
230630	Sunflower seed oilcake	8.29	11.59	14.65	32.93

**Austria's Top Five Food Waste and Animal Feed Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
230910	Dog and cat food, put up for retail	Switzerland 35.62	Germany 35.62	France 7.59	0.12
230400	Soymeal	Italy 36.77	Germany 33.03	Brazil 14.63	N/C
230990	Prepared animal feed, except cat and dog food	Germany 61.35	Netherlands 12.19	Switzerland 7.10	N/C
230641	Canola seed oilcake	Germany 49.58	Slovakia 22.89	Czech Republic 17.88	N/A
230630	Sunflower seed oilcake	Bulgaria 39.33	Germany 15.90	Italy 15.42	N/A



## 8. BEVERAGES

(Excl. juices)

### Austria's Top Ten Suppliers of Beverages C\$ Millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>690.32</b>	<b>776.35</b>	<b>751.75</b>	<b>837.90</b>	<b>935.28</b>	<b>7.89</b>
Germany	181.06	195.28	189.24	215.43	252.22	8.64
Italy	169.32	188.83	189.10	203.92	219.70	6.73
France	89.40	93.09	109.80	118.96	118.69	7.34
Switzerland	59.96	67.12	38.85	60.40	72.86	4.99
United Kingdom	16.74	25.16	24.94	28.95	34.20	19.55
United States	22.64	21.35	23.10	25.23	31.46	8.58
Hungary	10.63	23.50	19.99	19.94	27.68	27.05
Spain	18.99	20.53	19.09	19.34	24.42	6.49
Netherlands	14.15	14.61	16.48	21.68	20.93	10.29
Czech Republic	13.59	16.40	16.06	13.70	16.07	4.28
(46) Canada	0.09	0.08	0.15	0.13	0.17	16.23

### Austria's Top Ten Suppliers of Beverages % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	26.23	25.15	25.17	25.71	26.97	0.74
Italy	24.53	24.32	25.15	24.34	23.49	-1.04
France	12.95	11.99	14.61	14.20	12.69	-0.26
Switzerland	8.69	8.65	5.17	7.21	7.79	-0.90
United Kingdom	2.43	3.24	3.32	3.45	3.66	1.23
United States	3.28	2.75	3.07	3.01	3.36	0.08
Hungary	1.54	3.03	2.66	2.38	2.96	1.42
Spain	2.75	2.64	2.54	2.31	2.61	-0.14
Netherlands	2.05	1.88	2.19	2.59	2.24	0.19
Czech Republic	1.97	2.11	2.14	1.64	1.72	-0.25
(46) Canada	0.01	0.01	0.02	0.02	0.02	0.01

### Beverages Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	690.32	776.35	751.75	837.90	935.28	7.89
Austria's imports from Canada	0.09	0.08	0.15	0.13	0.17	16.23
Supply gap	690.23	776.26	751.61	837.78	935.11	7.89



### Austria's Top Five Beverages, C\$ Millions

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
220421	Grape wines, <2L	151.54	160.16	170.37	6.03
220290	Non-alcoholic beverages	90.18	103.80	122.63	16.61
220210	Mineral water	74.27	96.08	115.83	24.88
220410	Sparkling wine	93.78	101.58	107.76	7.19
220300	Beer made from malt	75.89	76.21	86.06	6.49

### Austria's Top Five Beverage's Imports and Top Supplying Countries, 2014

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
220421	Grape wines, <2L	Italy 51.61	France 18.11	Spain 7.82	0.01
220290	Non-alcoholic beverages	Germany 54.26	Switzerland 11.53	Belgium 5.51	N/A
220210	Mineral water	Switzerland 48.48	Germany 31.44	Netherlands 4.26	N/C
220410	Sparkling wine	France 41.13	Italy 33.70	Germany 20.18	N/A
220300	Beer made from malt	Germany 52.55	Mexico 11.30	Czech Republic 11.25	N/A



## 9. COCOA AND COCOA PREPARATIONS

**Austria's Top Ten Suppliers of Cocoa and Cocoa Preparations, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>525.24</b>	<b>548.87</b>	<b>539.66</b>	<b>629.53</b>	<b>726.64</b>	<b>8.45</b>
Germany	280.73	296.16	298.09	353.33	399.91	9.25
Netherlands	51.30	50.07	45.30	51.20	62.62	5.11
Belgium	35.22	42.58	37.81	41.14	46.46	7.17
Ghana	14.28	17.86	8.77	15.88	41.98	30.93
Italy	17.82	22.69	23.07	23.98	34.85	18.25
Slovakia	8.54	8.62	6.27	10.71	24.58	30.23
Switzerland	24.14	25.42	21.06	18.51	21.19	-3.21
France	13.64	13.00	14.02	15.33	16.33	4.60
Poland	20.98	12.36	11.59	14.23	15.46	-7.35
Czech Republic	0.32	1.56	11.37	14.61	15.20	161.82
(48) Canada	0.00	0.01	0.00	0.01	0.01	79.75

**Austria's Top Ten Suppliers of Cocoa and Cocoa Preparations, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Germany	53.45	53.96	55.24	56.13	55.04	1.59
Netherlands	9.77	9.12	8.39	8.13	8.62	-1.15
Belgium	6.71	7.76	7.01	6.53	6.39	-0.32
Ghana	2.72	3.25	1.62	2.52	5.78	3.06
Italy	3.39	4.13	4.27	3.81	4.80	1.41
Slovakia	1.63	1.57	1.16	1.70	3.38	1.75
Switzerland	4.60	4.63	3.90	2.94	2.92	-1.68
France	2.60	2.37	2.60	2.44	2.25	-0.35
Poland	3.99	2.25	2.15	2.26	2.13	-1.86
Czech Republic	0.06	0.28	2.11	2.32	2.09	2.03
(48) Canada	0.00	0.00	0.00	0.00	0.00	0.00

**Cocoa and Cocoa Preparations Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	525.24	548.87	539.66	629.53	726.64	8.45
Austria's imports from Canada	0.00	0.01	0.00	0.01	0.01	79.75
Supply gap	525.24	548.86	539.66	629.52	726.63	8.45



**Austria's Top Five Cocoa and Cocoa Preparations Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
180690	Cocoa preparations, not in bulk form	285.69	332.34	368.63	13.59
180632	Chocolate and other cocoa preparations, not bulk, not filled	80.63	98.09	113.21	18.49
180631	Chocolate and other cocoa preparations, not bulk, filled	74.32	80.40	88.04	8.84
180100	Whole raw or roasted ocoa beans	25.57	33.26	53.83	45.09
180620	Chocolate in blocks, >2Kg	30.08	35.33	42.81	19.30

**Austria's Top Five Cocoa and Cocoa Preparations Product Imports and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
180690	Cocoa preparations, not in bulk form	Germany 62.05	Italy 7.66	Belgium 7.52	N/C
180632	Chocolate and other cocoa preparations, not bulk, not filled	Germany 57.52	Slovakia 14.50	Bulgaria 6.34	N/C
180631	Chocolate and other cocoa preparations, not bulk, filled	Germany 71.42	Netherlands 11.28	Switzerland 3.02	N/C
180100	Cocoa beans, whole, raw or roasted	Ghana 77.26	Uganda 6.38	Cote D'ivoire 5.56	N/A
180620	Chocolate, in blocks, >2Kg	Germany 39.70	Belgium 30.04	Italy 12.58	N/A



## 10. EDIBLE VEGETABLES

**Austria's Top Ten Suppliers of Edible Vegetables, C\$ Millions**

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>665.46</b>	<b>627.56</b>	<b>596.41</b>	<b>663.01</b>	<b>706.93</b>	<b>1.52</b>
Italy	174.61	164.96	166.64	179.52	186.56	1.67
Germany	137.13	130.24	118.98	134.86	137.92	0.14
Spain	99.43	87.93	98.12	105.32	116.62	4.07
Netherlands	63.62	50.47	41.61	42.92	45.28	-8.15
Hungary	30.37	33.20	30.78	34.73	36.90	4.99
Belgium	29.95	27.60	26.73	31.78	32.91	2.39
France	13.62	17.90	16.18	19.62	21.27	11.80
Poland	18.86	16.75	18.89	18.66	20.26	1.81
China	15.95	16.36	12.13	12.17	15.37	-0.92
Turkey	12.32	10.70	10.16	11.76	14.14	3.50
(40) Canada	0.48	0.40	0.48	0.40	0.40	-4.43

**Austria's Top Ten Suppliers of Edible Vegetables, % Share**

Country	2010	2011	2012	2013	2014	PP Change 2010-14
Italy	26.24	26.29	27.94	27.08	26.39	0.15
Germany	20.61	20.75	19.95	20.34	19.51	-1.10
Spain	14.94	14.01	16.45	15.89	16.50	1.56
Netherlands	9.56	8.04	6.98	6.47	6.41	-3.15
Hungary	4.56	5.29	5.16	5.24	5.22	0.66
Belgium	4.50	4.40	4.48	4.79	4.66	0.16
France	2.05	2.85	2.71	2.96	3.01	0.96
Poland	2.83	2.67	3.17	2.81	2.87	0.04
China	2.40	2.61	2.03	1.84	2.17	-0.23
Turkey	1.85	1.71	1.70	1.77	2.00	0.15
(40) Canada	0.07	0.06	0.08	0.06	0.06	-0.01

**Edible Vegetables Supply Gap, C\$ Millions**

	2010	2011	2012	2013	2014	CAGR % 2010-14
Austria's imports from the world	665.46	627.56	596.41	663.01	706.93	1.52
Austria's imports from Canada	0.48	0.40	0.48	0.40	0.40	-4.43
Supply gap	664.98	627.16	595.94	662.61	706.53	1.53



**Austria's Top Five Edible Vegetable Product Imports, C\$ Millions**

HS Code	Product Description	2012	2013	2014	CAGR % 2012-14
070200	Fresh tomatoes	84.92	89.27	102.12	9.66
070999	Fresh vegetables, nesoi	60.84	67.95	82.77	16.64
070960	Fresh peppers	62.23	70.97	78.23	12.12
070519	Lettuce, except head lettuce	34.14	35.37	41.01	9.60
070700	Fresh cucumbers and gherkins	29.13	32.54	35.02	9.66

**Austria's Top Five Edible Vegetable Product Imports  
and Top Supplying Countries, 2014**

HS Code	Product Description	Market Share %			Canada's % Share
		1	2	3	
070200	Fresh tomatoes	Italy 43.76	Spain 26.09	Netherlands 11.59	N/A
070999	Fresh vegetables, nesoi	Germany 41.27	Italy 27.25	Spain 11.90	N/A
070960	Fresh peppers	Spain 34.29	Italy 13.74	Greece 10.08	N/A
070519	Lettuce, except head lettuce	Italy 53.43	Spain 25.37	Germany 15.74	N/A
070700	Fresh cucumbers and gherkins	Spain 46.00	Italy 15.87	Germany 8.47	N/A



## CONCLUSION

Austria is a developing market, and the world's 23<sup>rd</sup>-largest importer of agri-food and seafood products. Canada ranked as its 40<sup>th</sup>-largest supplier in 2014, having registered a fluctuation in import value since 2010. While Austria's imports from Canada have grown since 2010, they remain relatively marginal compared to other countries, such as Austria's European partners. This has created a significant supply gap between Austria and Canada that has been widening at similar rate to Austria's overall import growth in recent years. Austria has a diversified list of agri-food and seafood suppliers, however, the nine of the top ten primary trading partners are European Union members.

Although Canada imports (less than 1.0% market share) to Austria are relatively small compared to other suppliers, Canada did see a slight increase in six of the top ten commodities. These commodities were meat and edible offal, edible fruit and nuts, preserved foods, miscellaneous edible preparations, food waste and animal feed, and beverages. Once the Canada-European Union Comprehensive economic and Trade Agreement (CETA) enters into force this will provide Canada with preferential market access to 8.5 million (Austria's total population) consumers in the EU. The agreement will also eliminate approximately 95% of all EU tariff lines on the first day the agreement comes into force, creating significant opportunities in the agricultural and fish and seafood sector for Canada.

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in Austria**  
<http://www.tradecommissioner.gc.ca/eng/office.jsp?oid=243&cid=11E>
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)

## RESOURCES

Global Trade Atlas (October 2015).

## ANNEX: ABBREVIATIONS

- CAGR** - compound annual growth rate  
**N/A** - not applicable  
**N/C** - not calculable  
**PP** - percentage point (difference between two percentage values)





## **Competitive Trade Analysis: Austria**

*Global Analysis Report*

Prepared by: Carlos Jaramillo, Student

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