ANNEX TO THE WORLDWIDE FISHERIES MARKETING STUDY: PROSPECTS TO 1985

AUSTRIA

Government of Canada Gouvernement du Canada
Fisheries and Oceans Pêches et Océans

(This Report is one of a series of country and species annexes to the main study entitled the Overview)

DRAFT

Annex to the
Worldwide Fisheries Marketing Study
Prospects to 1985

AUSTRIA

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Specifically, this Report would not have been possible without the cooperation and assistance of fishermen, processors, brokers, wholesalers, distributors, retailers, consumers and their organizations as well as government officials with whom we visited and interviewed. Though too numerous to mention separately, we would like to extend our sincere gratitude and appreciation.

The views expressed in this Study, however, are ours alone and reflect the Canadian perception of worldwide markets.

With regard to the overall Study, we would like to acknowledge:

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E. Wong
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FOREWORD

As a consequence of global extension of fisheries jurisdictions, a radical shift has taken place in the pattern of worldwide fish supply and demand. This change is still going on and will continue for many years before a new dynamic equilibrium situation is reached. However, in the midst of this re-adjustment, a new trade pattern is emerging -- some net exporting countries are now importing and vice versa. In the longer term, some countries will experience shortages of supply and others will have a surplus. Fortunately, Canada is amongst the latter group.

The implications for the marketing of Canadian fisheries products arising from the worldwide introduction of the 200-mile limit are extensive. With our vastly improved supply position relative to world demand, government and industry are understandably concerned about ensuring that the bright promise of increased market opportunities are real and can be fulfilled. One of the steps in this process is the publication of the Worldwide Fisheries Marketing Study which assesses the global potential on a country and species basis.

Specifically, the purpose of the Study is to identify the longer term market opportunities for selected traditional and non-traditional species in existing and prospective markets and to identify factors which may hinder or help Canadian fisheries trade in world markets. To date, over 40 country markets and 8 species groups have been analyzed. It should be noted that while the information contained in the Reports was up-to-date when collected, some information may now be dated given the speed with which changes are occurring in the marketplace. In this same vein, the market projections should be viewed with caution given the present and still evolving re-alignment in the pattern of international fisheries trade, keeping in mind the variability of key factors such as foreign exchange rates, energy costs, bilateral fisheries arrangements and GATT agreements which have a direct effect on trade flows.

Notwithstanding, the findings contained in these Reports represent an important consolidation of knowledge regarding market potential and implications for improvements in our existing marketing and production practices. The results of the Study should, therefore, usefully serve as a basis for planning fisheries development and marketing activities by both government and industry in order to capitalize on the identified market opportunities.

This draft report is published for discussion purposes and as such we invite your critical comments.

Ed Wong

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Department of Fisheries and Oceans.
October, 1981.
Ottawa

WORLDWIDE FISHERIES MARKETING STUDY

AUSTRIA

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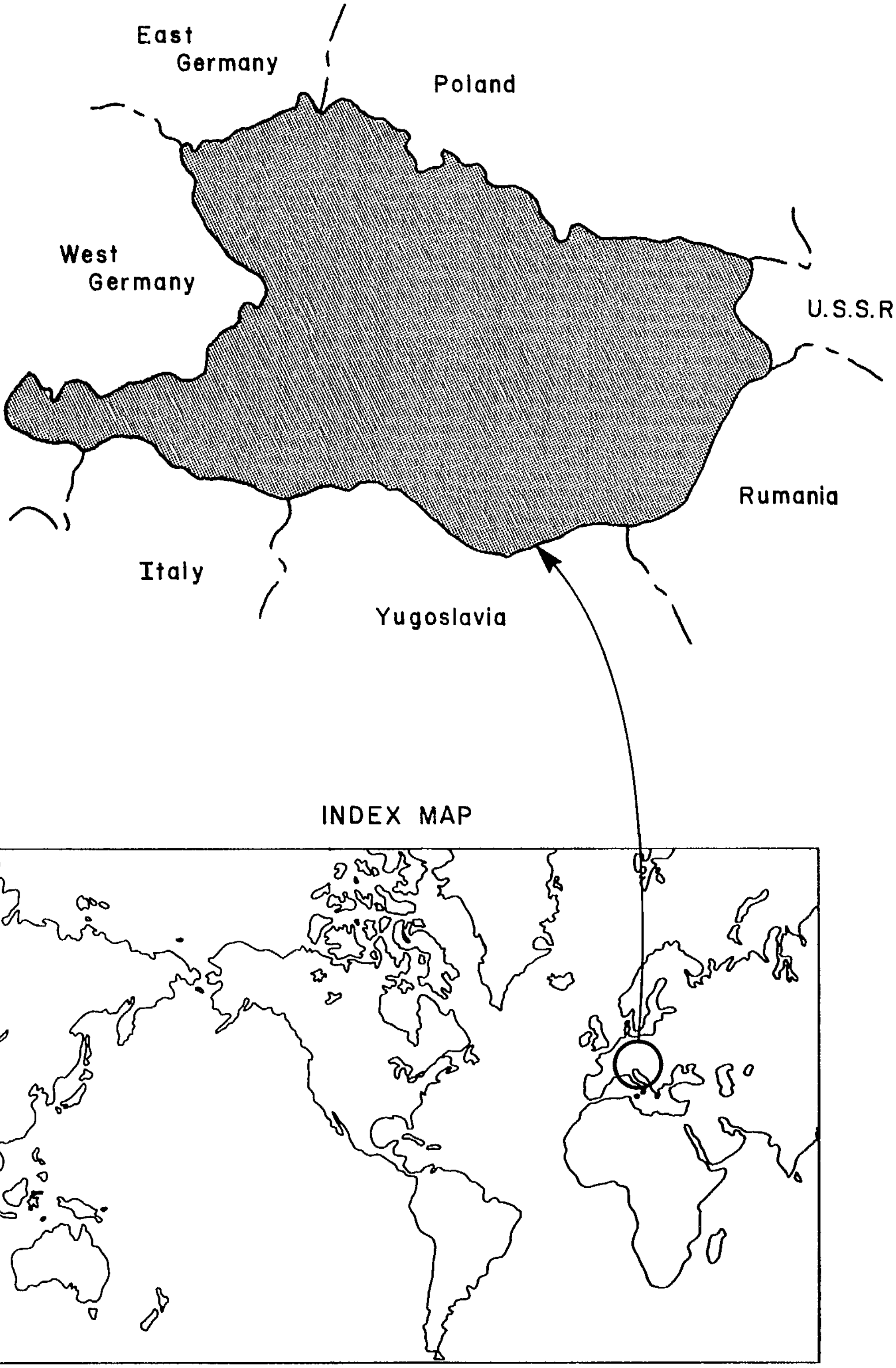
East Germany
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Yearly Average Exchange Rate

1978 1 Schilling=C$.07872

1979 1 Schilling=C$.08769

1980 1 Schilling=C$.090578

INTRODUCTION

Anomalies in statistics will be present in this report due to the fact that published Austrian statistics almost invariably differ with those published by international organizations such as the United Nations. In some cases, statistics were inadequate or unpublished and information obtained during meetings with various officials of industry and government have been used. Wherever possible, statistics published by international organizations have been used in order to provide a degree of uniformity between the various annexes to the Worldwide Fisheries Marketing Study. National statistics have been used to supplement the international and sources noted accordingly to assist the reader. A bibliography is attached at the back of this report for further reference purposes.

A. DEMAND FOR FISH

1. The Market in General

Austria is a small, landlocked country in Western Europe, with a relatively affluent population that has always shown a strong preference for meat and poultry over fish and seafood products.

The country is bounded on the south by Italy and Yugoslavia; on the west by Switzerland and Liechtenstein; on the north by Germany and Czechoslovakia and on the east by Hungary. Imported goods enter Austria through ports of France, Belgium, The Netherlands, Germany, Italy and Yugoslavia.

Austria is a member of the European Free Trade Association (EFTA) and in 1977 more than 80% of its trading was with EFTA and the other two European trading blocs, the European Economic Community (EC) and the Council for Mutual Assistance (COMECON).

The 16 member states of the EC and EFTA have eliminated nearly all customs tariffs and duties among these nations. Austria's main trading partner was the Federal Republic of Germany (FRG) which accounted for 34.6% of trade, followed by Italy at 8.6%, Switzerland at 8.1%, the United Kingdom (UK) at 4.8% and France, 3.7%.

Austria's population was estimated at 7.5 million in 1979, and according to projections is expected to remain fairly constant in the foreseeable future (Table 1).

TABLE 1

Austrian population growth (in millions)

1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1985
7.43	7.46	7.50	7.53	7.53	7.52	7.51	7.52	7.52	7.52	7.51

Source: Demographic Yearbook, 1977. United Nations, Department of International and Social Affairs; New York, 1978.

According to Austrian statistics for 1978, 80% of the total population was in the work force.[1] For the 36% of employed people classed as wage and salary earners, monthly income per employee was approximately C$1 000 or AS11 950 Schilling.[2] Figures were not available for the "administrator" category of employee, but it can be assumed that earnings were much higher.

The picture portrayed by Austrian statistics is that of a strong, healthy economy with a majority of households having two or more incomes, in which individual disposable earnings are relatively high with individual purchases influenced as much by choice as by price. A breakdown of the data reveals there are three distinct consumer demand groups: single people; small household/family units, and people over the age of 50, many of whom are single.

2. Domestic Consumption

Austrians are not heavy consumers of fish. Per capita consumption in 1978 was 4.1 kilograms, which is lower than the average for Western European countries, and projections indicate only a moderate increase to 4.6 kilograms by 1985 (Table 2).

This absence of enthusiasm for fish products is due at least in part to the fact that the country is landlocked, with a small and fragmented domestic freshwater fishery. Other factors include a traditional consumer preference for other protein foods, an emphasis on fresh products in all food forms, and a general lack of experience relative to the purchase, preparation and taste of fish products. In addition, transportation costs tend to keep the price of imported fish high in relation to substitute products which benefit from a system of government subsidies (on meat and poultry production).

Austrians spend approximately 26% of their disposable income on food, but in 1974 fish products accounted for just over 1% of spending, compared to 12% on meat, 3% on poultry, 3% on eggs and 2% on cheese. Indications are these ratios have not altered over time, and no change is expected for the near future.

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1 Statistical Handbook of the Republic of Austria, section 5.06.

2 Austrian Economy in Figures, 1978, Creditanstalt-Bankverein.

As noted earlier, Austrians strongly prefer all food products in fresh form. Frozen products are considered inferior, and this is reflected in demand both in the institutional market and the retail market. The trade is making a considerable effort to change this attitude, but success thus far is only marginal. Austria's major distributor of frozen fish, ESKIMO-IGLO, predicts that frozen fish could displace fresh fish by 1% to 2% per annum, with total per capita consumption remaining almost unchanged.

The fast-food concept is almost unknown, although the Nordsee company (a major wholesaler and retailer of fresh fish) has a number of outlets that could be classified as fast-food fish stores, offering open-faced fish sandwiches, herring preparations, seafood salads, etc. These stores have been very successful. The industry predicts a general growth in fast foods over the medium term, but it will come only by displacing other types of establishments, such as the traditional snack bars, small restaurants and coffee houses.

As for fully prepared fish products, no appreciable growth is anticipated, except possibly in sales of breaded sticks and portions. Cod fillets in different sauces have been introduced, but the trade considers them a failure.

TABLE 2
Austria: Average annual per capita fish consumption (kilograms)

Commodity Group	1970	1971	1972	1973	1974	1975	1976	1977	1978	1985
Fish, fresh, chilled or frozen	2.0	2.0	2.0	2.0	1.9	1.8	2.1	2.1	2.5	2.5
Fish, dried, salted, smoked or in brine	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Canned	1.6	1.6	1.6	1.9	2.1	1.5	1.9	2.0	1.5	2.0
TOTAL	3.7	3.7	3.7	4.0	4.1	3.4	4.1	4.2	4.1	4.6

Source: Austrian Ministry of Agriculture, Green Report, 1978.

TABLE 3

Austria: per capita average annual consumption of selected commodities (kilograms)

Commodity	1974/75	1975/76	1976/77	1977/78
Poultry	8.7	9.6	9.6	10.2
Meat	64.2	65.6	67.5	67.0
(beef)	(23.5)	(23.0)	(22.7)	(22.3)
(pork)	(38.1)	(39.9)	(42.1)	(42.1)
(veal)	(2.6)	(2.7)	(2.7)	(2.6)
Cheese	4.6	4.8	5.3	5.0
Eggs	14.2	14.4	14.5	14.2
Fresh fish	1.8	2.1	2.1	N.A.

Source: Statistical Handbook of the Republic of Austria, section 23.07.

n.a. - not available

TABLE 4

Austria: annual fish consumption (000 tonnes)

Commodity Group	1970	1971	1972	1973	1974	1975	1976	1977	1978	1985
Fish, fresh, chilled or frozen	14.9	14.9	15.0	15.0	14.3	13.5	15.8	15.8	18.8	18.8
Fish, dried, salted, smoked or in brine	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8
Canned	11.9	11.9	12.0	14.3	15.8	11.3	14.3	15.0	11.3	15.0
Total	27.5	27.6	27.8	30.1	30.9	25.6	30.9	31.6	30.9	34.6

Source: Calculated from Tables 1 and 2.

B. SUPPLY

1. The Domestic Industry

Austria's production of freshwater fish increased from an estimated 3 500 tonnes in 1976 to 6 000 tonnes in 1978. Virtually all of this production is purchased and consumed fresh.

The species produced are primarily trout and carp at the relatively stable rate of 1 000 tonnes and 2 500 tonnes per year respectively. Other species harvested include grayling, char, pike and whitefish.

As noted previously, Austrian statistics on fisheries are not always adequate, but in some areas data can be obtained from individual provinces or fishermen's organizations. Approximate production figures can be derived by using international statistics on imports, exports, population and fish consumption. This approach, along with figures contained in the Austrian Ministry of Agriculture Green Report, 1978, were used to compile the following table.

TABLE 5
Austria: freshwater fish production
(tonnes)

	1976	1977	1978
Carp	1 000	1 000	1 000
Trout	2 500	2 500	2 500
Other (pike, char, tench, grayling, whitefish)	n.a.	1 500	2 500
Total	3 500	5 000	6 000

According to Austrian government officials, 6 000 tonnes (product weight) is the maximum productive capability of the domestic fishery. Active stocking of lakes is expected to maintain this annual yield through 1985.

As noted previously, what commercial fishery does exist in Austria is fragmented. Those who fish do so mainly for recreation or to supplement incomes. Responsibility for fish resources rests with the individual provinces, which means there are at least nine variations of rules and regulations.

Ownership rights to lakes are granted by the provinces, and the lake owners are responsible for stocking and control. The resource allocation is normally determined by local fishermen's councils.

The Austrian Federal Institute for Water Research and the Fishing Industry offers the only assistance the government provides for fishermen. Located at Mondsee, it employs seven scientists and three technicians who can give advice and guidance. It produces eggs, fingerlings and fry for sale to lake and pond owners. It also holds training courses and publishes informative articles for fishermen. The institute is encouraging aquaculture and polyculture development in Austria's estimated 9 000 lakes/ponds and 100 000 kilometres of rivers and streams, to counter the effects of water pollution from pulp and paper and sugar refining industries. To date, however, no aquaculture operation exists in the country.

2. Imports

Austria imported 25 305.3 tonnes of fish in 1978, down from 26 733.4 tonnes in 1977 and 28 599.5 tonnes in 1976 (Table 6). Of this total, canned fish accounted for 13 386.2 tonnes, followed by fish preparations, including caviar, at 13 013.5 tonnes, and fresh, chilled and frozen fish at 11 155.4 tonnes.

Of Austria's total imports, Canadian statistics indicate Canada supplied only 42 tonnes, with a value of $182 400. Major suppliers for the period 1975-1978 were the EC and EFTA (Tables 6 and 7).

However, Canadian statistics do not appear to tell the complete story concerning Canadian products that enter Austria. According to Austrian data, during the last three years shipments of Canadian trout and similar species, herring and crustaceans and molluscs have entered the country in greater volumes than would be indicated by Canadian data.

The obvious reason for this is that Austrian import documentation requires a statement of country of origin, and some fish products sold by the European Community are of Canadian origin and transshipped to Austria.

Given that the Austrian market does not require large volume shipments of most fishery products, and that EC countries are significant trading partners of Canada, it is not surprising that consolidated shipments are arriving from the EC with some Canadian content.

Statistics Canada reports Canadian exports to Austria of the following types of fisheries products:

- salmon, Atlantic, fresh, whole dressed
- salmon, spring, frozen, whole dressed
- salmon, smoked
- salmon, canned
- sea fish fillets, frozen
- crabs, fresh or frozen
- crabs, canned
- lobster, fresh or frozen
- lobster and products, canned

This trade has not been consistent and the value per annum has not usually exceeded $75 000. In 1980, Canada sold less than 4 tonnes of fish to Austria for about $46 000; most of this was frozen lobster. However, since Austrian trade figures (Table 6) indicate that the volume of Canadian imports in 1978 was 42 tonnes while Canadian figures show barely 3 tonnes, it is obvious that Canadian fish is being imported by companies in other European countries and re-exported to Austria. Austrian figures show that freshwater fish (especially trout), herring, molluscs and crustaceans have been imported from Canada. This transshipment is not surprising considering that direct routes to Austria are limited and the distribution channels are so clearly defined.

In addition to the foregoing, Austrian trade sources have expressed an interest in the following fisheries supplies:

- salmon, pink, frozen, whole dressed (for smoking)
- herring, frozen, whole or headed and gutted
- mackerel, 14%-16% fat content, size unspecified
- perchpike, frozen, boneless fillets (150-300 grams each, packaged two per poly-bag with a divider between)
- cheap frozen fish for sale to Eastern bloc trading partners
- lobster, live, 700-900 grams size and 1 100-2 000 grams size
- canned fish soups, chowders and matjes* fillets in 125 gram cans.

TABLE 6

Austria: Fisheries Imports
1975 - 1978
(by volume, tonnes)

Product	1975	1976	1977	1978
Fish, fresh, chilled, frozen	10 741.6	11 880.6	11 436.6	11 155.4
Fish, salted, dried, smoked	489.7	546.6	648.5	504.9
Crustaceans, molluscs	202.8	239.3	213.7	258.8
Fish, canned	11 897.1	15 933.0	14 434.6	1 386.2
				- - - - -
Fish preparations, caviar				13 013.5
Crustaceans/molluscs				372.7
Total fish/crustaceans of which:	23 331.2	28 599.5	26 733.4	25 305.3
EC	11 131.9	14 249.9	13 222.2	12 593.5
EFTA	4 409.6	5 626.9	5 601.6	6 288.5
COMECON	1 309.6	1 221.5	1 322.3	948.3
Rest of world	6 480.1	7 501.2	6 587.3	5 475.0
of which:				
CANADA	10.2	8.7	13.2	42.0

* Matjes refer to gibbed fat herring, light cured with a mixture of salt, sugar, and sometimes saltpetre, packed in barrels.

Sources: Austria, Annual Fisheries Review, 1977, Dept. of Industry, Trade and Commerce, Ottawa
Austrian Statistical Office, (SITC) Revised

TABLE 7

Austria: Fisheries Imports
1975 - 1978
(by value, ($000)

Product	1975	1976	1977	1978
Fish, fresh, chilled, frozen	13 928.6	19 051.0	25 809.7	26 856.0
Fish, salted, dried, smoked	869.8	1 345.3	1 890.8	1 952.0
Crustaceans, molluscs	536.1	790.0	1 341.0	1 683.0
Fish, canned	17 201.2	26 209.1	32 767.5	34 770.0
Fish, canned				32 941.0
Crustaceans/molluscs				1 829.0
Total fish/crustaceans	32 535.7	47 395.4	61 809.0	65 261.0
of which:				
EC	17 919.2	24 370.4	31 429.1	33 396.0
EFTA	7 228.7	10 977.9	14 975.0	17 572.0
COMECON	1 365.2	1 540.1	2 279.9	2 109.0
Rest of world	6 022.6	10 487.0	13 125.0	12 184.0
of which:				
CANADA	40.7	58.6	156.9	182.4

Sources: Austria, Annual Fisheries Review, 1977, Dept. of Industry, Trade and Commerce, Ottawa.
Austrian Statistical Office, (SITC) Revised.

Exchange Rate Used: 1975 C$1.00 = AS 18.00
1976 C$1.00 = AS 16.00
1977 C$1.00 = AS 13.00
1978 C$1.00 = AS 12.00
1979 C$1.00 = AS 11.00

3. Demand-Supply Balance

The assessment of the demand-supply balance in Austria to 1985 can simply be expressed as, no drastic change.

This is a highly organized and defined market with no apparent evidence of existing companies jockeying or otherwise competing for another's territory. For example:

ESKIMO-IGLO	wholesaler/retailer of frozen fish	operates as an importer/distributor of frozen fish
NORDSEE	wholesaler/retailer of fresh fish	operates fish fast-food style snack bars/distributor of fresh fish
WIKING	wholesaler/distributor of full fish product line to retailers	operates as importer/wholesale distributor of full product line and smokes fish
SCHENKEN	wholesaler of a gourmet line of canned and preserved food products	operates as an importer/wholesaler
TRADERS	Conduct the full spectrum of trading operations	importer/exporter/wholesaler primarily handling Eastern bloc transactions

Source: Canadian Embassy, Vienna and representatives of the Austrian Fisheries trade.

Therefore, no significant change to 1985 is forecast for the national commercial marketing aspect of the fishing industry.

4. Exports

Obviously, given its small and fragmented freshwater fishery, Austria cannot be a significant exporter of fish products. For 1978, the country's exports of these products totalled 365.2 tonnes, a decline from 432.6 tonnes in 1977 and 576.2 tonnes in 1976. It is likely that some of these were re-exports. The majority of sales were to EFTA countries, followed by COMECON and the EC, with the rest of the world accounting for only 0.3 of a tonne of purchases. Nothing was sold to Canada.

In value, however, Austria's fish exports increased to $1.526 million in 1978 from $1.356 million in 1977, $1.350 million in 1976 and $874 100 in 1975.

Once again, EFTA countries were the major buyers, followed by the EC and COMECON, and Canada was again listed at nil.

C. POTENTIAL FOR CANADIAN SALES

1. Penetrating the Market

There are significant problems to be overcome by any Canadian supplier interested in penetrating the limited market in Austria.

First there is the relatively low level of fish consumption. Then there is the tendency of consumers to stick with brand images that are familiar; the difficulty of obtaining shelf or freezer display space, and the price of fish relative to other protein food products.

Nonetheless, there are possibilities worth exploring, and the most promising appears to be the shipping of familiar products, packed for the labels of well-known companies, through traditional customers such as FRG, Denmark and France, which in turn supply consolidated shipments of fish products to Austria.

Potential exists also for direct sales of live lobster as well as container shipments of perchpike and herring.

The ESKIMO-IGLO firm buys its products direct but contracts the processing to the Unilever company in FRG. Products marketed by ESKIMO-IGLO in Austria, by rank order, are cod, saithe and Argentine hake, in various semi-processed and processed forms. There is some potential here for processed blocks, but the Canadian product suffers from a poor quality image which must be overcome if suppliers are to capitalize on this opportunity.

Potential exists for sales of canned herring, mackerel, shrimp, crabmeat and lobster, if they can be packed under the purchaser's label.

Opportunity exists as well for large-volume sales of cheap frozen fish products to Austrian traders who specialize in transactions with the Eastern Bloc countries.

2. Pricing Considerations

Competitive pricing of suitable products will prove challenging because of the quality requirements of the market, the proximity advantage enjoyed by EC suppliers, the competitive price of substitute protein food products, and consumer preferences.

A brief survey of supermarkets (Appendix XII) shows the only Canadian product found (canned lobster) was very much on the upper end of the price scale at C$7.43 for a can containing 71 grams of meat. Statistics Canada figures show that exports of canned lobster fell to zero in 1980; however frozen lobster exports doubled.

There is an additional problem for Canadian sales of frozen boneless cod fillets in the 400 gram (most common size) pack. This product is listed on the Austrian Cost of Living Index and therefore subject to price control. Any price increase must be approved by the Parity Commission which has a voluntary membership including representation from trade organizations, unions, Chambers of Commerce and the federal government.

D. SUMMARY AND CONCLUSION

1. A landlocked country with a population of around 7.5 million that is expected to remain fairly constant in the foreseeable future, Austria is not, by either world or European standards, a large market for fish products.

2. Per capita consumption of fish in 1978 was 4.1 kilograms, which is lower than the average for Western European countries, and projections indicate only a moderate increase to 4.6 kilograms by 1985. Total fish consumption stood at 30 800 tonnes in 1978, and was expected to reach 35 500 tonnes by 1985.

3. Traditionally and historically, Austrians prefer poultry, pork, beef and veal. The relatively affluent population spends approximately 26% of disposable income on food, but in 1974 fish products accounted for just over 1% of this.

4. A number of factors contribute to the absence of enthusiasm for fish. The country is landlocked, with a domestic freshwater fishery that is small and fragmented. Apart from the traditional preference for other protein foods, there is a general demand for fresh products in all food forms, and a lack of experience relative to the purchase, preparation and taste of fish products. Transportation costs tend to keep the price of imported fish high, and a contributing factor here is a system of government subsidies on meat and poultry production.

5. Productive capacity of the domestic freshwater fishery has probably reached its limit with an annual output of around 6 000 tonnes, virtually all of which is consumed in Austria. Thus the country relies heavily on imports to meet domestic demand. Main suppliers are countries of the European Economic Community (EC), the European Free Trade Association (EFTA) and the Council for Mutual Assistance (COMECON).

6. The strong consumer preference for fresh foodstuffs is accompanied by a belief that frozen products are of inferior quality. The local trade is attempting to turn this attitude around in Austria's highly organized and

defined market, and it expects that frozen fish products will displace fresh fish by 1% to 2% per annum, but without any significant change in per capita consumption.

7. Opportunities for Canadian sales are limited, but some do exist and are worth exploring by suppliers who are willing to face challenges, not the least of which is the price advantage enjoyed by traditional European suppliers in terms of proximity to the market and thus lower transportation costs.

8. The most promising of possibilities would appear to be the shipping of familiar products, packed for the labels of well-known companies, through traditional customers such as FRG, Denmark and France, which in turn supply consolidated shipments of fish products to Austria.

9. Potential exists as well for direct sales of live lobster and container shipments of perchpike and herring. One of Austria's major distributors, ESKIMO-IGLO, buys its products direct but contracts processing to the Unilever company in FRG. There could be some potential here for processed blocks, but the Canadian product suffers from a poor quality image, which must be overcome if suppliers are to take advantage of this opportunity. Possibilities are there also for sales of canned herring, mackerel, shrimp, crabmeat and lobster, if they can be packed under the purchaser's label. Canadian suppliers might also explore the possibility of large-volume sales of cheap frozen fish products to Austrian traders who specialize in resale to Eastern Bloc countries.

A P P E N D I C E S

APPENDIX I

AUSTRIAN TRADE IN FISH AND FISH PRODUCTS

1970 - 1978

APPENDIX I

AUSTRIAN TRADE IN FISH AND FISH PRODUCTS

1970 - 1978

	Unit	1970	1971	1972	1973	1974	1975	1976	1977	1978
Imports: Fish, fresh, chilled or frozen	t	12 400	11 400	10 800	10 800	10 100	10 700	11 900	11 437	11 155
Exports: (as above)	t	200	200	200	200	200	200	300	286	258
Imports: Fish, dried, salted or smoked	t	500	400	400	400	400	500	500	648	505
Exports: (as above)	t	--	--	--	--	--	--	--	--	--
Imports: Crustaceans & Molluscs, fresh frozen, dried, salted, etc.	t	300	200	200	100	200	200	200	214	259
Exports: (as above)	t	400	300	400	100	200	100	200	19	20
Imports: Fish products & preparations, whether or not in airtight containers	t	11 000	12 800	12 600	15 300	14 000	11 600	15 500	14 003	13 013
Exports: (as above)	t	100	100	100	100	100	100	100	126	86
Imports: Crustacean & Mollusc products and preparations, whether or not in airtight containers	t	200	300	200	400	300	300	500	431	373
Exports: (as above)	t	0	0	--	0	0	0	0	2	0
Imports: Oils & Fats, crude or refined, of aquatic animal origin	t	1 000	1 000	1 000	1 200	1 100	900	1 200	755	na
Exports: (as above)	t	0	--	0	0	0	0	0	0	na
Imports: Meals, soluables and similar animal foodstuffs, or aquatic animal origin	t	57 500	56 700	52 000	24 200	32 400	37 600	38 300	32 613	na
Exports: (as above)	t	100	--	100	200	300	--	--	686	na
Total Imports of Seven Fishery Commodity Groups	t	82 900	82 800	77 200	52 400	58 500	61 800	68 100	60 101	na
Total Exports of Seven Fishery Commodity Groups	t	800	600	800	600	800	400	600	1 119	na
(Exports as a Ratio of Imports)		(.965)	(.724)	(1.036)	(1.145)	(1.367)	(.647)	(.881)	(1.861)	na

Source: FAO, 1977 Yearbook of Fishery Statistics, Fishery Commodities. Vol. 45, Rome, Italy.

APPENDIX II

AUSTRIA: FISHERIES IMPORTS
1975 - 1978
(by volume, tonnes)

Product	1975	1976	1977	1978
Fish, fresh, chilled, frozen	157.3	261.9	285.6	258.2
Fish, salted, dried, smoked	0.1	--	--	0.1
Crustaceans, molluscs	146.0	189.3	19.2	20.2
Fish, canned	82.3	125.0	127.8	86.7
Fish preparations, caviar				86.4
Crustaceans/molluscs				0.3
Total fish/crustaceans	385.7	576.2	432.6	365.2
of which:				
EC	174.9	247.3	91.0	77.9
EFTA	134.1	211.6	232.5	201.5
COMECON	76.5	101.7	109.1	85.5
Rest of world	0.2	15.6	--	0.3
of which:				
CANADA	--	--	--	--

Sources: Austria, Annual Fisheries Review, 1977, Dept. of Industry, Trade and Commerce, Ottawa
Austrian Statistical Office, (SITC) Revised

APPENDIX III

AUSTRIA: FISHERIES IMPORTS

1975 - 1978

(by value, $000)

Product	1975	1976	1977	1978
Fish, fresh, chilled, frozen	367.9	589.6	888.8	1 052.3
Fish, salted, dried, smoked	0.8	--	0.3	1.4
Crustaceans, molluscs	348.6	537.8	157.9	226.3
Fish, canned	156.8	223.5	309.7	246.3
Fish preparations, caviar				245.7
Crustaceans/molluscs				0.6
Total fish/crustaceans	874.1	1 350.9	1 356.7	1 526.3
of which:				
EC	450.8	723.1	456.5	639.6
EFTA	268.6	417.5	622.8	642.2
COMECON	149.2	191.3	274.4	244.0
Rest of world	5.5	19.0	3.0	0.5
of which:				
CANADA	--	--	--	--

Sources: Austria, Annual Fisheries Review, 1977, Dept. of Industry, Trade and Commerce, Ottawa
Austrian Statistical Office, (SITC) Revised

Exchange Rate Used: 1975 C$1.00 - AS 18.00
1976 C$1.00 - AS 16.00
1977 C$1.00 - AS 13.00
1978 C$1.00 - AS 12.00
1979 C$1.00 - AS 11.00

APPENDIX IV

TRANSPORTATION COSTS

Given the close geographic proximity a number of European suppliers have, there is no doubt that transportation costs place Canada at a considerable disadvantage in exporting products to Austria and could conceivably price the Canadian products out of the market. However, some Canadian fish exporters already have branch offices and cold storage facilities in Europe and are in a position to penetrate and supply this market on a sustained basis, providing product and price can match consumer demand.

Austrians have a distinct preference for fresh fish. At present this demand is being met by domestic production and imports from Denmark and FRG which arrive via surface transport within a maximum of two days. Canadian exporters would have to airfreight product in order to compete with the fresh quality aspect and in so doing would almost certainly become non-competitive in price.

Credit Arrangements and Financial Practices

Commercial transactions are conducted in a manner similar to those of Canada, i.e., initial shipments by irrevocable letter of credit, whereas, long established trading relationships might use bank drafts.

APPENDIX V

MARKET ENTRY REQUIREMENTS AND BARRIERS

Regarding product, there are three prime considerations: top quality, competitive pricing, and limited volume (or consolidated) shipments. If these considerations can be met, then existing or potential Canadian fisheries exports will be competitive in Austria.

Regulatory Considerations

Processed Food Imports

The Austrian Federal Ministry of Health and Environmental Protection during 1978 issued a new regulation regarding imported processed foods, which is to be complied with when shipments arrive in Austria. Basically, the ordinance requires that food shipments must be carefully inspected upon arrival in Austria to ascertain, inter alia, that such shipments are in compliance with Austrian sanitary and other applicable regulations.

Labelling Regulations for Canned and Preserved Fish

The Labelling Act for Food published in the Federal Gazette on December 20, 1973 provides the following for fish, crustaceans and molluscs and products thereof as well as for products with additions of these animals or of products from these animals or of products from these animals as far as the addition is not serving as a garnish:

The marking has to be clear, legible and indelible. It must be in the German language, have Roman letters, Arabic figures with the exception of foreign language characteristics used in normal commercial usage. The marking according to the hereunder mentioned points 9, 10 and 12 must show clearly the referred time indication.

I. Marking Characteristics:

1) The trade name.

2) The name (company's name or abbreviation) and location of the producer, packer or sales organization. Foreign companies also have to add the producer's country.

3) The filled weight in metric (average weight of the packed food).

5) The weight of the raw value determining parts must be indicated in metric at the time of packing (the amount of filled fish). Technically and technologically conditioned variations are to be tolerated.

6) Indications of the type of process used such as "pasteurisiert" (pasteurized), "sterilisiert" (sterilized), "ultrahoch erhitz" (ultra-violet heated), "getrocknet" (dried), "gefriergetrocknet" (freeze-dried), or "tiefgekühlt" (deep frozen).

7) Indication as to the shelf-life limitations by adding for example "auch bei Kühlung nur beschränkt haltbar" (even when cooled limited storage life) or "zum alsbaldigen Verbrauch bestimmt" (to be used as soon as possible). If the date of final consumption is indicated on the can, above is not necessary.

8) Conditions for storage.

9) The time of packing, not coded, according to:
   a) day, month and year
   b) month and year
   c) year

10) A time indication up to which the food -- provided the indicated storage conditions are kept -- is edible coded according to:

a) day and month
b) day, month and year
c) month and year
d) year.

12) The time of packing in coded form -- according to day, month and year -- or the charge number.

13) An indication of kind and amount of added vitamins.

16) The indication of the number of pieces whereby technically conditioned variations are to be tolerated.

18) A list of the main parts -- except water -- in a decreasing line of their share or their importance whereby generic names can be used.

19) An indication of additives contained in the food such as "chemisch konserviert" (chemically conserved), "gefärbt" (coloured), "künstlich artomatisiert" (artificially flavoured), natürlich aromatisiert" (naturally flavoured), "gebleicht" (bleached) or with their generic name such as "mit chemischen Konservierungsmittel" (chemically conserved) etc.

II. Catalogue of Goods

A) Durable products:
1, 2, 3, 5, 13, 18, 19 and by choice 9c or 10d in addition with 12.

B) Semi-durable products:
1, 2, 3, 5, 6, 7, 8, 10c, 12, 13, 18 and 19.

C) Other:
1, 2, 3, 5, 6, 7, 8, 9a, 10a, 13, 16, 18 and 19.

These regulations came into force on January 1, 1974.

Additives and Preservatives Regulations

Three separate ordinances apply as follows:

1. Preservatives for Canned Fish
2. Color Additives in Salmon Substitutes
3. Additives to Canned Fish and Prepared Dishes

Further information regarding these regulations is available upon request from the Department of Industry, Trade and Commerce, European Bureau, Ottawa or the Canadian Embassy, Commercial Division, Vienna, Austria.

Customs Tariff

Duties are ad valorem and are computed on the basis of price, to which is added all charges for delivery to the place of clearance, freight, insurance, packing, brokerage, and various other incidental costs. It does not include delivery expenses accruing after the commodity has crossed the Austrian customs border.

Under the Austrian Customs Law, provision is made for a two-column tariff, with general and convential (i.e., lower) duty rates. Conventional rates are granted to all countries which are adherents to the GATT agreement, including Canada and, since January 1, 1971, to all other countries, as well. General rates only serve as the basis for certain tariff reductions. The Austrian tariffs affecting fisheries products imports are shown in Appendix VI.

As of April 1, 1972, Austria decided to extend preferential tariffs to developing nations, with the scope of the tariff cuts, generally speaking, exceeding recommended levels.

Austria is moving toward increasing the exchange of goods with Eastern Europe and has concluded long-term trade and industrial co-operation agreements with a number of Eastern European countries.

Customs Surcharges and Indirect Taxes

There are no customs surcharge as such, but all imports are subject to a value-added tax and some products to various other taxes.

The VAT replaced the turnover tax in January, 1973. For imports, it is levied at a rate of 18% on the duty paid price at the time customs clearance is made. The reduced rate of 8% is applicable to food products. From January 1, 1978, a 30% rate is applied to luxury goods, including new cars and motorcycles, jewelry, antiques, Persian rugs, furs, entertainment equipment, etc.

There are monopoly fees on spirits, salt and tobacco products; excise taxes on alcoholic beverages and petroleum products.

All imported goods are subject to a foreign trade promotion charge of 0.3% assessed on the CIF value. This tax applies to exports also. The proceeds are used to defray the expenses of the measures to promote Austrian foreign trade, notably the offices of the Austrian trade delegates abroad. In addition, a small trade statistical fee is levied on both imports and exports.

Import and Exchange Controls

Austria has no import restrictions on fisheries products.

There are no exchange controls over imports from Canada.

Consular Requirements

There are no consular requirements.

Commercial Invoices

Commercial invoices should be forwarded at least in duplicate. There are no special requirements as to form or phraseology. It is advisable, however, to specify the following information, as the importer will be required to file an import declaration containing these particulars: shipper's name and address; consignee's name and address; a full description of the goods with regard to marks, number of packages, quantities, class and contents of packages, value, net and gross weight (should be in metric units); and the country of origin. The original invoice must be signed by the sender.

Goods subject to ad valorem duties in Austria should be accompanied by a commercial invoice. These should be made out in duplicate in the German language, and should give detailed information of transportation costs, rebates and commissions. One copy of the invoice is retained by the customs authorities.

Bill of Lading

There are no special requirements affecting the preparation of bills of lading. "To order" bills of lading are acceptable.

Certificates of Origin

Austrian authorities may require a certificate of origin for certain goods. The importer should advise the exporter when such a certificate is needed.

General

While shipping documents should be completed preferably in the German language, English and French is also acceptable. Weights and measures must be stated in metric units. Values should be shown in the currency of the country, i.e. Austrian Schilling.

Special Certificates

Imports of a number of animals and raw materials of animal origin, including fish meal, must be accompanied by a certificate of origin issued by veterinary authorities and/or a health certificate, and in some cases, are subject to veterinary inspection at the Austrian border.

Air Shipments

For imports by air the same Customs regulations apply.

Parcel Post

For imports by parcel post the same Customs regulations apply. However, such shipments must also comply with international postal regulations.

Samples

Samples of no commercial value are admitted into Austria free of duty. Those regarded by the Customs authorities to be of commercial value are dutiable at regular commodity rates or may be admitted upon deposit or bond of an amount equal to the duty normally payable, subject to refund upon re-exportation of the goods.

Advertising Matter

While advertising matter for the tourist industry, fairs, festivals, etc. is exempt from duty, but not from equalization tax, commercial advertising material (prospectuses, price lists, etc.) is subject to customs duty and equalization tax.

Notwithstanding anything hitherto mentioned, exporters should be prepared to deviate in order to comply with specific instructions received from agents or importers.

APPENDIX VI

TARIFF SCHEDULE

Review of the following tariff schedule for Austria will reveal that those fish products identified in Section 4(c) of this report as having the most potential in the Austrian market generally enter tariff-free, the exception being canned shrimp, crabmeat and lobster which is subject to a 20% tariff.

Applicable tariff schedules follow.

AUSTRIA - No. 191 (9th Edition)

Tariff Heading	Description of Goods	Duty Rates in % Ad Val or in Schillings/100 KG	
		GENERAL	GATT

CHAPTER 3

Fish, Crustaceans and Molluscs

Note: This Chapter does not cover:

a) Marine mammals (heading No. 01.06) or meat thereof (heading No. 02.04 or 02.06);
b) Fish (including livers and roes thereof), crustaceans and molluscs, dead, unfit or unsuitable for human consumption by reason of either their species or their condition (Chapter 5); or
c) Caviar or caviar substitutes (heading No. 16.04).

APPENDIX VI (cont'd)

Tariff Heading	Description of Goods	Duty Rates in % Ad Val or in Schillings/100 KG GENERAL	GATT
03.01	Fish, fresh (live or dead), chilled or frozen:		
	A. Freshwater fish:		
	1. Whole fish, not exceeding 20 cm. in length	Free	---
	2. Other:		
	a) Trout and fish of the trout kind	1 500	25%
	b) Carp	300	---
	c) Other	20%	---
	B. Saltwater fish:		
	1. Herring, except filleted herring	Free	---
	2. Fillets of herring	18%	Free
	3. Other	Free	---
	Note: Carp of 03.01A2(b), up to an annual quota of 100 tonnes	Free	---
	The annual quota may be increased by the Federal Ministry of Finance, with the agreement of the Federal Ministry of Agriculture and Forestry, when domestic sources of supply prove to be insufficient.		
03.01	Fish, dried salted or in brine, smoked fish, whether or not cooked before or during the smoking process:		
	A. Smoked	250	---
	1. Eels and salmon, in other than airtight containers	---	11%

APPENDIX VI (cont'd)

Tariff Heading	Description of Goods	Duty Rates in % Ad Val or in Schillings/100 KG	
		GENERAL	GATT
	2. Kippers (salted and smoked herring without any addition), in airtight containers	---	120
	B. Dried, but not further prepared	Free	---
	C. Cut herring (Schneideheringe)	Free	---
	D. Other:		
	1. In immediate containers containing 15 kg or less	530	25%
	2. Other	10%	---
	ex. D 1 and 2: Herring, salted, in other than airtight containers	---	Free
	Note: Salted fish of subheading 03.02D, for the preparation, on an industrial scale, of fish-based products, subject to permit	Free	---
03.03	Crustaceans and molluscs, whether in shell or not, fresh (live or dead), chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water	2 000	---
	Shrimps, whether in shell or not, fresh (live or dead), chilled, frozen, salted or in brine	---	15%

APPENDIX VI (cont'd)

AUSTRIA - No. 191 (9th Edition)

Tariff Heading	Description of Goods	Duty Rates in % Ad Val or in Schillings/100 KG	
		GENERAL	GATT

SECTION IV

PREPARED FOODSTUFFS; BEVERAGES, SPIRITS AND VINEGAR; TOBACCO

Chapter 16

Preparations of meat, of fish, of crustaceans or molluscs.

Note - This Chapter does not cover meat, meat offal, fish, crustaceans or molluscs, prepared or preserved by the processes specified in Chapters 2 and 3.

Tariff Heading	Description of Goods	Duty Rates in % Ad Val or in Schillings/100 KG	
		GENERAL	GATT
16.04	Prepared or preserved fish, including caviar and caviar substitutes		
	A. Caviar and caviar substitutes	7 000	---
	1. Caviar	---	30%
	2. Caviar substitutes	---	1 000
	B. Other:		
	1. In airtight containers:		

APPENDIX VI (cont'd)

Tariff Heading	Description of Goods	Duty Rates in % Ad Val or in Schillings/100 KG	
		GENERAL	GATT
	(a) Fish (except anchovies and preparations of the anchovy kind, of all kinds) in oil only	15%	---
	(b) Other	530	---
	1. Fish, cooked or smoked, in sauces, mayonnaise, remoulade, or in not jellying liquids	---	110
	2. Fish, cooked or smoked, in own juice	---	90
	3. Grilled herring (Bratheringe)	---	360
	4. Eels, in airtight containers of a gross weight of 4.5 kg or more	---	250
	5. Other	---	430
	2. Otherwise put up	530	---
	- Eels in barrels or similar containers	---	275
16.05	Crustaceans and molluscs, prepared or preserved	3 000	20%

APPENDIX VII

MARKET IMPLICATIONS FOR CANADIAN TRADE OF THIRD COUNTRY EXPORTS

Exports

Austrian fisheries exports to 1985 will not have any serious implications for Canadian trade as they are only expected to range from 600 to 1 000 tonnes of fresh freshwater fish product per annum.

General Trade Agreements

Austria is a member of the OECD and the GATT.

Austria has trade relations with all three European trading blocs, the EC, EFTA and COMECON but in no case has it entered into trade relations which might violate its neutrality or prejudice its sovereignty.

As a member of EFTA, Austria grants duty-free entry to 11 industrial imports and certain agricultural imports from its EFTA partners: Finland, Iceland, Norway, Portugal, Sweden and Switzerland.

The 16 member-states of the EC and EFTA have also removed almost all customs tariffs and duties among themselves. Exceptions are those covering 'sensitive' products, such as paper and some agricultural products.

Austria has long-term bilateral trade agreements with countries of COMECON.

APPENDIX VIII

FISHERIES POLICIES

The Austrian Ministry of Health and Environmental Protection is responsible for legislation and regulations governing food products in Austria.

Responsibility for the resource rests with the Austrian Ministry of Agriculture and Forestry. The Austrian Federal Institute for Water Research and the Fishing Industry reports to this Ministry and at present represents the sole government office actively involved with the fishing industry.

Licensing of fishermen falls within provincial mandate. Each province's policies vary somewhat.

Control of the fishery rests with the "water owners". Registration of these rights is not required by the federal government, therefore, no records are available in this respect. Control appears to be exercised by individual judgement.

No profile of the domestic fishery exists.

Import and export permits are not required.

Tariffs are established under the GATT.

APPENDIX IX

DISTRIBUTION AND SALES CHANNELS

Marketing Centres

Austria has four easily definable marketing areas. The largest and most important is the capital city of Vienna and the surrounding area. It is highly industrialized, containing 26% of the country's total industrial establishments. Roughly one third of Austria's total purchasing power is concentrated in this small area.

The second marketing area comprises the three provinces of Styria, Lower Austria, and Upper Austria. Half of Austria's purchasing power is found in these three provinces.

Of the two remaining markets, roughly 15% of total purchasing power is centred in Carinthia, Tirol, and Salzburg, and the other 7% in the provinces of Vorarlberg in the extreme west and Burgenland in the extreme east. Burgenland is basically a rural area with little industry. Vorarlberg is a highly industrialized province with a per capita income equal to that of Vienna.

East-West Trade

In addition to the key marketing areas within the country, Austria also serves as a gateway to markets in Eastern Europe. Austria's many trading firms specializing in East-West Trade can be of considerable assistance to exporters seeking outlets in Eastern Europe.

Marketing Practices

In recognition of the relatively small size of the marketing area, local agents are generally given exclusive distribution rights for a particular product line. Most Austrian firms insist on a written contract specifying the period during which the arrangements may not be cancelled except for reasons provided in the contract. Depending upon the product and the promotional effort involved, this period may range from one to five years, following a test period of as much as one year.

Major exporters from many European countries generally give their Austrian representatives extremely favorable financial and material support in introducing new products on the local market. They share in or cover the costs of advertising, preparing prospectuses and manuals in the German language, as well as of demonstration units, display materials, and spare parts. Exporters not prepared to offer such assistance may encounter difficulty in finding satisfactory representatives, even though their products may be superior to those of their competitors.

The establishment of a brand name in the Austrian market may take some time and effort. Samples are quite helpful to distributors, agents, wholesalers, and retailers. It is also advisable to supply them with high-quality sales literature in the German language, as importers are often unwilling to spend time and money on translating such material.

Import Channels

Canadian suppliers can approach the Austrian market through various channels. Some entail little participation by Canadian firm and others require direct and active involvement. The most appropriate channel would depend on the product itself, financial considerations, and such other factors as the size of the market, long-term sales potential, and the need for promoting, installing, or servicing the product.

APPENDIX X

TRANSPORTATION

Surface shipping time from eastern Canada to Vienna for general cargo on scheduled carriers normally runs at least three weeks. Since Austria is landlocked, sea cargo must first pass through German, Dutch, Belgian, Italian, or Yugoslav ports. The closest ones are the port of Rijeka in Yugoslavia and Trieste in Italy. These southern ports offer the advantage of proximity and hence lower surface transportation costs but are no match for the lower ocean freight rates, faster services, and more frequent sailings of the North Sea ports.

Most of the traffic between Austria and the seaports is carried by rail at preferential rates. However, in the case of the Belgian and Dutch ports, about one third of the traffic is carried by road. Some of the oceangoing trade between the North German ports and Austria is carried in combination rail-river barge service, with transshipment at Regensburg.

Once cargo has arrived in Austria, it can be forwarded within the country in a matter of hours. The well-developed railway, airline, inland waterway, and highway network is fully equipped to handle the efficient and rapid movement of goods within the Austrian market.

APPENDIX XI

AUSTRIAN IMPORTERS OF FISHERIES PRODUCTS

Company	Telex (founded) Telephone	Type of Trade
"Alpi" Handelsges.m.b.H. Schillerstrasse 35 A-5021 Salzburg	06-3914 (1962) 06222 - 78591	A B 1 3
Gottlieb Budin Heinrich von Türlinstrasse 5 A-9500 Villach	--- (1930) 04242 - 24789	B 2
Otto Borowicka Holochergasse 29-31 A-1150 Vienna	--- (1912) 92-51-11	C 1
Cerny & Teklits * Treustrasse 84 A-1200 Vienna	7-4369 --- 35-22-12	A B 2 3 4
Hans Chalupsky Kaiser-Josef-Platz 7 A-4601 Wels	--- (1926) 07242 - 7666	B 2 3
Samuel Diamantstein Wenrgasse 27 A-1050 Vienna	--- (1949) 56-14-28	A C 1
Eskimo-Iglo GmbH * Industriestrasse 2 A-2301 Gross-Enzersdorf	07-4373 (1946) 02249 - 8221	A 1 3 4

APPENDIX XI (cont'd)

Company	Telex (founded) Telephone	Type of Trade
Gebr. Fasthuber Pfarrgasse 15 A-4601 Wels	--- (1905) 07242 - 7087	A B 3 4
Fürbass GmbH Griesauweg 31 A-6020 Innsbruck	05-3603 (1893) 05222 - 51602	A B 2 3 4
Alois Gmeiner Domgasse 22 A-9020 Klagenfurt	--- (1928) 04222 - 85384	A B 2 3
Hella Gruber Naschmarkt 33 A-1040 Vienna	--- (1972) 56-32-73	A B 2 3 4
Max Hawlik K.G. Waldeggstrasse 44 A-4020 Linz	02-1519 (1931) 0732 - 80890	A B C 1 2 3
Hilcona GmbH * Rheinstrasse 72 A-6900 Bregenz	05-7625 (1949) 05574 - 31496	A B C 1 2 3
Hofbauer & Hammerschmidt KG * Rudolfsplatz 3 A-1010 Vienna	--- (1941) 63-83-07	A B C 2 3 4
J. Hornig Waagner Biro-Str. 39-41 A-8020 Graz	03-1232 (1852) 0316 - 51511	B 2 3 4

APPENDIX XI (cont'd)

Company	Telex (founded) Telephone	Type of Trade
Kamleitner & Kraupa *	02-1699	A B 2 3 4
Lederergasse 78	(1899)	
A-4-20 Linz	0732 - 77246	
Paul Kerber	01-2011	B 2 3
Dapontegasse 11	(1874)	
A-1031 Vienna	72-24-95	
IMGRO	07-4400	B 2 3
Nordbahnhof	(1949)	
A-1020 Vienna	24-85-61	
Hugo Kollmer	---	B C 1 2 3
Steingasse 25	(1902)	
A-1030 Vienna	73-35-55	
Hans Krieg	06-3460	A B C 1 2 3 4
Hanuschplatz 1	(1945)	
A-5020 Salzburg	06222 - 81732	
Adolf Krieglstein	07-4961	A B 2 3
Rötzergasse 36	(1930)	
A-1170 Vienna	46-13-01	
LEGA KG	01-9255	B 2 3
Erlaufpromenade 84	(1924)	
A-3270 Scheibbs	07482 - 2517	
Löwa Warenhandels GmbH *	---	B 2 3 4
Favoritenstrasse 183	(1972)	
A-1100 Vienna	43-35-21	

APPENDIX XI (cont'd)

Company	Telex (founded) Telephone	Type of Trade
Karl Meltschok Griesplatz 36 A-8020 Graz	03-1133 (1930) 0316 - 86837	A B C 1 2 3 4
Nagel & Blum OHG A-6973 Höchst 265	--- (1952) 05578 - 301	A B 3
Nordsee GmbH Rosengasse 4 A-1010 Vienna	--- (1911) 66-19-0	A B C 2 3 4
Gustav Orgonyi Columbusgasse 102 A-1100 Vienna	--- --- 64-22-94	B C 2 3
Schallaböck, Sasina & Co. Pappenheimgasse 3 A-1200 Vienna	--- (1930) 33-72-53	A B C 2 3
Enrich Schenkel & Sohn Hasenauerstrasse 2-4 A-1190 Vienna	07-5811 (1885) 34-93-63	A B 2 3
Rud. Schneider sen. & Comp. Leibnizgasse 55-57 A-1100 Vienna	--- (1890) 64-12-91	A B C 1 2 3
VOG GmbH * Bäckermühlweg 44 A-4010 Linz	02-1202 (1916) 0732 - 42361	B 2 3

APPENDIX XI (cont'd)

Company	Telex (founded) Telephone	Type of Trade
C. Warhanek Troststrasse 73-75 A-1100 Vienna	01-2640 (1858) 64-15-81	B 1 2 3
Wiking AG * Nordwestbahnhof A-1201 Vienna	07-4004 (1924) 33-41-45	A B C 1 2 3
Anton Zack Schlossergasse 25 A-6010 Innsbruck	05-3470 (1896) 05222 - 27148	A B 2 3 4
Ferd. Mayr KG A-4631 Krenglbach 13	02-5542 (1909) 07249 - 29114	D

Source: <u>Austrian Trade Compass</u>) 1979/80
<u>Austrian Manufacturers Compass</u>)

Explanation of Codes:

1 - manufacturer	A - fish general	* - large company
2 - importer	B - canned	
3 - wholesale	C - marinades	
4 - retail	D - fishmeal	

APPENDIX XII

RETAIL SURVEY

APPENDIX XII

Monday (afternoon) March 17, 1980

TOUR SUPERMARKETS TO VIEW AND PRICE FISHERIES PRODUCTS AND FISH SUBSTITUTES

PRODUCT	COUNTRY OF ORIGIN	BRAND/PRODUCER	SIZE	CONTENT	PRICE (AS)	PRICE (C$)
Canned						
Sardines in hot sauce	Portugal	NURI	125gr	95gr fish 30gr carrots, salt, pepper, cucumber	9.90	0.87
Light tuna in dressing sauce	Japan	GEISHA Nozaki & Co. Ltd., Tokyo	185gr	100gr fish, 85gr peas, onions, oil sauce, salt, spices	7.50	0.66
Smoked gray fish in sauce	West Germany	LISNER SCHILLERLOCKEN	100gr	70gr fish 30gr soya oil, salt, spices, tomato ketchup	19.90	1.75
Tuna	Japan	Mitsubishi, Japan	185gr	100 tuna 85 onions, peas, vegetable oil, spices	8.40	0.74
Light tuna (fancy)	Japan	Mitsubishi, Japan	200gr		13.90	1.22
Sprats in sauce	West Germany	Otto Richter KG	113gr	fish, soybean oil, tomato paste, spices	13.90	1.22
Sprats smoked in sauce	West Germany	Otto Richter KG	113gr	fish, soybean oil, tomato paste, spices	16.90	1.49
Cod liver paste	West Germany	GUNKEL Baltamare Fienkost, Kiel	113gr	cod liver, mushrooms, spices	13.90	1.22

APPENDIX XII (cont'd)

PRODUCT	COUNTRY OF ORIGIN	BRAND/PRODUCER	SIZE	CONTENT	PRICE (AS)	PRICE (C$)
Canned						
Cod liver paste	West Germany	GUMKEL Baltamare Fienkost, Kiel	113gr	cod liver, oil, spice	13.90	1.22
Cod liver paste	West Germany	GUNKEL Baltamare Fienkost, Kiel	113gr	cod liver, mushrooms, oil, spices	13.90	1.22
Lobster	Canada	KRONEN HUMMER	85gr	71gr meat	84.40	7.43
Lobster	Canada	SCHECKEN	85gr	71gr meat	84.40	7.43
Squid	Russia	——	250gr	112gr meat	13.90	1.22
Herring in 1. pepper sauce 2. herb sauce 3. barbeque sauce	West Germany	LISNER	190gr	——	17.40	1.53
Herring in 1. tomato sauce 2. paprika sauce 3. mustard sauce 4. hungarian sauce	West Germany	BEACH FLOUR produced by Lubick FRG for Interfood London GB	170gr	105gr fish	11.90	1.05
Herring	West Germany	BEACH FLOUR Produced by Lubick, FRG for Interfood London GB	170gr	105gr fish, oil juice	14.90	1.31
Mackerel in sauce	West Germany	GUNKEL Baltamare	190gr	fish, onions, vinegar, paprika, cucumber, sugar, pumpkin, salt, herbs, spices	17.40	1.53

APPENDIX XII (cont'd)

PRODUCT	COUNTRY OF ORIGIN	BRAND/PRODUCER	SIZE	CONTENT	PRICE (AS)	PRICE (C$)
Canned						
Party Snack	West Germany	GUNKEL Baltamare	113gr	50gr fish, onions, mushrooms, vinegar, soya oil	12.90	1.14
Sardines	Portugal	LAGE	125gr	fish, soya oil	10.90	0.96
Sardines	Portugal	PO VEIRA	125gr	fish, soya oil	9.90	0.87
Sardines	Yugoslavia	CORSO	125gr	90gr fish, salad oil	3.90	0.34
Sardines	Yugoslavia	NURI	125gr	90gr fish, salad oil	3.90	0.34
Carp in sauce	Hungary	UNGER LAND	400gr	220gr fish, onions, paprika, tomatoes,salt, spice	10.90	0.96
Lobster soup	England	CAMPBELL	298gr	28gr lobster	15.40	1.36
Preserved						
Herring pickled	—	GABELROLLA	390gr	200gr fish, 190gr sauerkraut, etc.	36.90	3.24
Fish eggs	Sweden	SEEHASENROGN (SEARABBIT)	100gr 59gr		19.80 16.40	1.74 1.44
Caviar-black	—	—	50gr	glass jar	15.80	1.39

APPENDIX XII (cont'd)

PRODUCT	COUNTRY OF ORIGIN	BRAND/PRODUCER	SIZE	CONTENT	PRICE (AS)	PRICE (C$)
Preserved						
Shrimp - very small pink	—	—	370gr	290gr shrimp bottled	84.00	7.39
Herring	West Germany	NORDA Nordsee, Bremerhaven	200gr	100gr herring packaged in plastic tray in variety of ways	20.30 to 22.40	1.79 1.97
Smoked						
Salmon, sliced	West Germany	—	200gr	—	85.90	7.56
Rainbow trout, whole	Austria	—	1 kg	—	170.00	14.96
Rainbow trout, fillets	Austria	—	1 kg	—	330.00	29.04
Carp, fillet	Austria	—	1 kg	—	170.00	14.96
Frozen						
Cod fillets-boneless (dorsch filets)	West Germany	—	400gr	6 portions	29.80	2.62
Cod fillets-with bones	West Germany	—	400gr	6 portions	28.90	2.54
Halibut fillets-boneless (sea salmon)	Norway	—	400gr	6 portions	27.90	2.46
Plaice fillets (scholle filets)	Denmark	—	350gr	single pack	38.90	3.42
Cod fillets (dorsch filets)	West Germany	—	400gr	—	26.90	2.37

APPENDIX XII (cont'd)

PRODUCT	COUNTRY OF ORIGIN	BRAND/PRODUCER	SIZE	CONTENT	PRICE (AS)	PRICE (C$)
Frozen						
Sea pike	West Germany	—	1 kg	10 portions	55.90	4.92
Rainbow trout	Denmark	—	340gr	2 whole fish in vac pack	39.90	3.51
Rainbow trout	Denmark	—	1 kg	fillets	330.00	29.04
Sardines (sardinen)	Italy	PINGUINO	500gr	whole frozen on styrofoam tray wrapped in cello	16.90	1.49
Pagel Zahn Vrassen	Italy	PINGUINO	500gr	whole frozen on styrofoam tray wrapped in cello	24.90	2.19
Anchovy (sardellen)	Italy	PINGUINO	500gr	whole frozen on styrofoam tray wrapped in cello	16.90	1.49
Red mullet barbel (rote meerbarben)	Italy	PINGUINO	500gr	3 whole frozen on styrofoam tray wrapped in cello	37.90	3.34
Mussels (mies muscheln)	Italy	PINGUINO	500gr	whole frozen on styrofoam tray wrapped in cello	37.90	3.34
Shrimp	Denmark	NORDSEE West Germany	200gr	I.Q.F. poly bag	64.90	5.71

APPENDIX XII (cont'd)

PRODUCT	COUNTRY OF ORIGIN	BRAND/PRODUCER	SIZE	CONTENT	PRICE (AS)	PRICE (C$)
Frozen						
Fish soup mix	—	IGLO	250gr	—	26.90	2.37
Frozen Breaded						
Halibut/pollook (sea lack)	Norway	—	—	8 portions 290gr fish	26.90	2.37
				12 portions 444gr fish	38.50	3.39
				bread, flour, onions, salt, sugar, oil, skim milk powder, glutenates, yeast	—	—
Cod fish stocks (dorsch)	Norway	—	180gr	117gr fish 6 portions	14.90	1.31
			225gr	185gr fish 10 portions	22.50	1.98
			420gr	273gr fish 14 portions	30.50	2.68
Fish cakes	Norway	—	300gr	37gr fish 6 portions	16.90	1.49
Sea pike steak	West Germany	—	700gr	100gr fish	44.90	3.95
SUBSTITUTES						
Frozen						
Chicken leg and thigh	Hungary	—	500gr	Grade A	19.90	1.75

PRODUCT	COUNTRY OF ORIGIN	BRAND/PRODUCER	SIZE	CONTENT	PRICE (AS)	PRICE (C$)
SUBSTITUTES						
Frozen						
Chicken leg and thigh	Hungary	____	500gr	Grade A	19.90	1.75
Turkey fillets (schnitzel)	Israel	____	100gr	10 pieces	89.00	7.83
Fresh						
Beef, rib roast (tafelspitz)			per kg		85.00	7.48
Beef, sirloin roast (gusto)			per kg		84.90	7.47
Beef, rump roast			per kg		89.90	7.91
Beef, round steak			per kg		89.90	7.91
Beef, porterhouse			per kg		105.90	9.32
Hamburger (beef & pork)			per kg		44.90	3.95
Pork, rib loin			per kg		59.80	5.26
Pork, spare ribs			per kg		39.90	3.51
Pork, shoulder roast			per kg		27.90	2.46
Pork, leg			per kg		29.90	2.63
Pork, leg & shank (for spit cooking)			per kg		16.90	1.49

APPENDIX XII (cont'd)

PRODUCT	COUNTRY OF ORIGIN	BRAND/PRODUCER	SIZE	CONTENT	PRICE (AS)	PRICE (C$)
Fresh						
Chicken, whole broiler			per kg		29.90	2.63
Chicken, whole roaster			per kg		37.90	3.36
Veal, chop/steak			per kg		99.00	8.71
Veal, cutlet			per kg		59.80	5.26

Conversion rate used:

$1 Cdn = .0878 Schilling

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