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Netherlands

Exporter Guide

Annual

2006

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Report Highlights:
This report provides an overview for U.S. companies interested in exporting to the Benelux (Belgium, Luxembourg & Netherlands), focusing on exports of consumer-oriented food, beverages and edible fishery products.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
The Hague [NL1]
[NL]

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SECTION I. Market Overview

Economic Situation
The Netherlands

Economic growth in 2006 is expected to come out strong at an estimated 3.25 %, up from 1.5 % in 2005. This positive trend is expected to continue in 2007. Based on current budget proposals, the Netherlands Bureau for Economic Policy Analysis (CPB) has provided an official estimate for 2007 economic growth of 3.0 %.

Overall growth continues to be driven by exports, which were up by 8.3 and 6.9 percent in the first two quarters of 2006 compared to the first two quarters of last year. In 2006, a 2 % increase in consumer spending is expected to become the second driver of growth, The increase in consumer spending is mostly due to a general increase in people's net income for the first year since 2002. For 2007, the cabinet has proposed measures to cut real taxes by 1 billion euros, which it believes should boost private spending further.

Inflation has been below the euro area average for the last three years and is estimated to come out at 1.25% in 2006. The difference between the Netherlands and the eurozone is partly due to a price war between the major super market franchises, which has contributed to drive the prices of food and beverages to well below the eurozone average.

Figure 1: Key Data Dutch Economy

	2005	2006*	2007**
Economic Growth %	1.5	3.25	3.0
Inflation (CPI) %	1.7	1.25	1.5
Unemployment %	6.5	5.5	4.5
GDP	€ billion	€ billion	€ billion

Source: Central Bureau of Statistics
* estimate, ** forecast

Belgium
Economic growth in 2006 is expected to increase by 2.5% up from 1.1% in 2005. Inflation is expected to be 1.8% this year, lower compared to last year's percentage. Unemployment in Belgium is slightly lower than EU average (8.9%). Just like the Dutch, the Belgians spend around 15% of their total spending on food.

Figure 2: Key Data Belgian Economy

	2005	2006*	2007**
Economic Growth %	1.1	2.5	2.0
Inflation (CPI) %	2.8	1.8	1.8
Unemployment %	8.4	8.2	8.2
GDP	€298 billion	€311 billion	€324 billion

Source: National Bank of Belgium
* estimates, ** forecast

The Size And Growth Rate For The Consumer Foods And Edible Fishery Product Markets

Figure 3: US Exports Of Consumer-Oriented Agricultural And Fish & Seafood Products
x US$ 1,000

US exports to Belgium/Netherlands/Luxembourg	CY 2003	CY 2004	CY 2005	Jan-July 2005	Jan-July 2006
Consumer-Oriented Agricultural Total	708,336	755,629	861,107	457,845	508,256
Snack Foods (Excl Nuts)	10,967	10,816	12,581	7,299	6,085
Breakfast Cereals & Pancake Mix	481	3,870	1,553	889	829
Red Meats, Fresh/Chilled/Frozen	13,128	18,933	34,084	17,681	18,056
Red Meats, Prepared/Preserved	1,052	1,510	1,289	761	321
Poultry Meat	10,568	1,070	651	453	313
Dairy Products	16,747	23,446	10,374	6,214	10,441
Eggs & Products	5,616	2,722	3,876	1,868	4,167
Fresh Fruit	30,839	37,108	42,745	27,897	13,216
Fresh Vegetables	13,330	11,229	8,781	6,165	6,313
Processed Fruit & Vegetables	63,468	54,265	57,511	34,618	39,956
Fruit & Vegetable Juices	115,478	103,226	94,362	51,190	80,526
Tree Nuts	176,053	208,903	335,412	146,880	169,378
Wine & Beer	88,931	99,622	46,272	29,141	31,619
Nursery Products & Cut Flowers	54,989	64,649	64,175	37,246	37,612
Pet Foods (Dog & Cat Food)	31,837	18,553	26,812	14,312	19,677
Other Consumer-Oriented Products	74,850	95,707	120,630	75,232	69,945
			0	0	0
Fish & Seafood Products, Edible	112,117	138,183	183,161	81,344	85,618
Salmon, Whole Or Eviscerated	4,297	6,290	11,158	1,205	1,095
Salmon, Canned	8,495	7,225	9,124	4,834	4,789
Crab & Crabmeat	119	125	341	199	1,218
Surimi (Fish Paste)	5,115	3,842	14,995	9,396	4,359
Roe & Urchin (Fish Eggs)	1,071	5,673	4,752	1,332	850
Other Edible Fish & Seafood	93,022	115,028	142,790	64,378	73,308

Source: BICO

Key Demographic developments and the Impact on Consumer Buying Habits

The Benelux has over 26.7 million inhabitants and is the most densely populated region in the EU, with 412 people per square kilometer. More than two-thirds of its slowly growing population lives in a 100 mile corridor stretching from Amsterdam to Brussels. There are some 11.5 million households with an average size of 2.3 people.

Figure 4: Key Figures Benelux

	2004	2005
Population	26.6 million	26.7 million
Number of Households	11.4 million	11.5 million
Household Size	2.3	2.3

Source: CBS, Statbel

The trend toward smaller household size will continue and the population is aging (almost 15 percent of the population is 65 years or older).

Figure 5: Dutch Population by Age Group in percentage

Year	0 - 19	20 – 39	40 - 64	65 – 79	80+	Total Population
1963	38.1	26.4	26.1	7.9	1.5	11,889,962
1973	35.0	29.0	25.6	8.6	1.8	13,387,623
1983	29.7	32.6	26.0	9.4	2.4	14,339,551
1993	24.6	32.9	29.5	10.0	3.0	15,239,182
2003	24.5	28.6	33.2	10.4	3.4	16,192,572
2006*	24.3	26.9	34.5	10.7	3.6	16,334,210

Source: CBS, *estimate from CBS

The non-Dutch population in the Netherlands (20%) has grown by 5 percent during the past 2 years whereas the population with Dutch ethnicity grew during the same period by only 1.1 percent. As a result there has been strong growth in the number of stores serving ethnic niche markets and demand for non-traditional Dutch food. The non-Belgian population in Belgium is much smaller and accounts for only 7%.

Figure 6: Main Non-Dutch Population by Ethnicity

	2003	2004	2005	2006*
Indonesian	400,622	398,502	396,080	393,057
Turkish	341,400	351,648	358,846	364,333
Surinamese	320,658	325,281	329,430	331,890
Moroccan	295,332	306,219	315,821	323,239
Netherlands Antilles & Aruba	129,312	130,722	130,538	129,683

Source: CBS
*estimates

Figure 7: Main Non-Belgian Population by Ethnicity

	2003	2004	2005
Italian	193,000	190,000	186,000
French	113,000	115,000	118,000
Dutch	92,000	94,000	97,000
Moroccan	106,000	101,000	94,000
Turkish	59,000	56,000	53,000

Source: Statbel.

Figure 8: Advantages and Challenges, US Products Face In The Benelux

Advantages	Challenges
? Affluent and open minded consumers	? Saturated markets
? Highly developed infrastructure, trade history and mentality	? Transportation costs and time
? Strong interest in buying new and innovative products and/or concepts	? Competition from local companies
? Favorable image of American products	? Tariffs and Non-Tariff trade barriers

Source: USDA

The Need for Convenience
During the past 5 decades women have become increasingly active in the work force. The Benelux ranks among the highest in Europe of women working outside the home. At the same time, the Netherlands has the highest rate of women working part time.

Since time has become more scarce, consumers want to spend a minimum of time on dinner preparation. This, in combination with the increase in double income households, has been the main force behind the increasing demand for convenience food. Consumers increasingly want portioned, easy-to-prepare, healthy and tasty meals.

Food Safety
Safety of food products remains another issue for consumers. Because of a number of food safety scares during past years, this issue has become more important to consumers. These crises prompted the government and many other organizations to focus on consumer demands for safe and traceable products. Retailers, processors and producers are setting up traceable supply chains to minimize risks and regain consumers' trust.

More information on food safety (including traceability) can found on http://useu.usmission.gov/agri/foodsafe.html and http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN BE 6007 and NL 6025.

Organic Food
Recent figures show that although consumer are increasingly buying more organic products (mainly bread and dairy products) the organic industry still remains a niche industry and has an overall 1.8 percent market share in the Benelux. More information on the Benelux market for organic products can be found on http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN NL 6024.

SECTION II. Exporter Business Tips

Local Business Customs

Following are some characteristics of doing business in the Netherlands, Belgium or Luxembourg:

- The majority of the business people speak English (especially in the Netherlands) and have a high level of education (Masters or Bachelors degree).
- Generally speaking, they are straightforward and business minded. They want to be well informed on the product/service and the counterpart before doing business. At the same time they do not want to waste their time and can be quick decision makers.
- Due to the increasing power by retailers and changing consumers' demands, food processors are increasingly looking for long-term partnerships rather than a one-off business transaction.
- Importers are now, due to the growing economy, more than before looking for added value, healthy or unique products for their customer.

General Consumer Tastes and Preferences

As a result of changing demographics, the need for convenience, food safety and the threat of obesity, consumer preferences are changing.

Figure 9: Consumer Trends

Consumers' needs and preferences:	
Health:	natural ingredients - lower calories – no sugar – healthy meals
Convenience:	fresh pre-packed food components – take-away – fresh ready-to-eat meals
Price:	discount - special offers – higher prices as long as they can be justified
Distribution:	more specialty shops
Food Safety:	more information – more guarantees
Stores:	personalized service – wider assortment- more fresh and non-food – convenience foods – while at the same time there is huge demand for limited assortment as long as the products are low cost

Source: USDA

Food Standards & Regulations and General Import & Inspection Procedures

A detailed report on import regulation standards and also on general import and inspection procedures can be found on the FAS homepage: GAIN Report Number: NL6025 and BE6007. http://www.fas.usda.gov/scriptsw/attacherep/default.asp

SECTION III. Market Sector Structure and Trends

Market Overview – Food Retail

In the Benelux, the food retail industry had a total turnover of about 43 billion EURO in 2005. Total turnover is finally going up, after an almost three year period of Dutch retailers fighting each other on p rices. The price war led to Laurus, second largest food retailer in Netherlands, selling two of their formulas, for more information on Laurus, please go to http://www.fas.usda.gov/scriptsw/attacherep/default.asp and search for GAIN Report NL 6017.

The food retail industry in the Benelux is highly consolidated and quite often retailers even work together in purchase organizations which consolidates the market even more. The figure below reflects the level of consolidation.

Figure 10: Retailers in Belgium

Company name	market share in retail market	market share on the purchase side
Carrefour	24.8%	26.9%
- Mestdagh	2.1%	
Delhaize	20.2%	21.5%
- DistriGroup 21	1.0%	
Colruyt	16.9%	20.6%
- Spar	2.6%	
- Alvo	1.1%	
Aldi	11.2%	11.2%
Louis Delhaize	2.0%	9.0%
- Cora	3.9%	
- Match	1.6%	
- Other	1.5%	
Lidl	3.9%	3.9%
Other		6.9%

Source: Store Check

Figure 11: Retailers in the Netherlands

Company name	market share in retail market	market share on the purchase side
Albert Heijn	26.4%	26.4%
Laurus	14.3%	14.3%
Schuitema/C1000	14.8%	14.8%
Aldi	9.5%	9.5%
Lidl	3.8%	3.8%
Superunie		25.9%
- Plus	4.6%	
- Jumbo	3.1%	
- Coop	1.9%	
- Spar	1.4%	
- Other	14.9%	
Dirk van den Broek Bedrijven		4.4%
- Bas van der Heijden		
- Dirk van den Broek		
- Digros		

Source: AC Nielsen

Besides the traditional supermarket chains as discussed above, we see new firms entering the food retail market. Not only non food retailers like Ikea, HEMA and V&D increasingly sell food products, it's the upscale department stores (like de Bijenkorf) and independent specialty stores that start selling, mainly specialty, food products and drinks. Their focus, so far, has been on sauces, condiments, snacks and specialty drinks. Finally we see that, in this segment, US products are competing with English, Australian and Canadian products for shelf space.

Traditional butcher and fruit & vegetable shops but also small independent family run supermarkets are losing market share. Th e supermarkets are either bought by big retailer chains or are closed down. The traditional butcher and fruit & vegetable shops are increasingly changing into specialty shops and the majority of these have moved into making meal components or into caterin g. By adding more value to their once basic products, they manage to stay in business and serve products that the regular retailer does not sell.

Market Overview – Food Service

Figures indicate that 70 percent of food expenditures in the Benelux wind up in supermarket tills; however their share of the total food dollar has been declining. Analysts expect the hotel and restaurant and institutional food service (HRI) market share to grow further to approximately 40 percent of total food expenditures (especially in the Netherlands). This is the result of increasing disposable income, scarcity of time for cooking and continued increases in the number of working women. The turnover of the Benelux HRI foodservice industry in 2005 was €16 billion.

Unfortunately, potential U.S. sales to the foodservice industry are hampered by the same obstacles that limit sales to the retail sector. Basic products such as beef, chicken and pork are essentially barred from the market due to sanitary restrictions, while high tariffs and the restrictions on many biotech products keep processed foods from the US off store shelves.

The Benelux fast-food sector and catering industries are highly consolidated. A few international and national players dominate those sub sectors. The other HRI sub sectors, like restaurants, cafés/bars and kiosks, are highly fragmented. In general they are independently operated companies with their own purchase patterns and buyers.

Figure 13: Leading Fast-Food Companies in the Benelux

Source: USDA The Hague

Figure 14: Leading Caterers in the Benelux

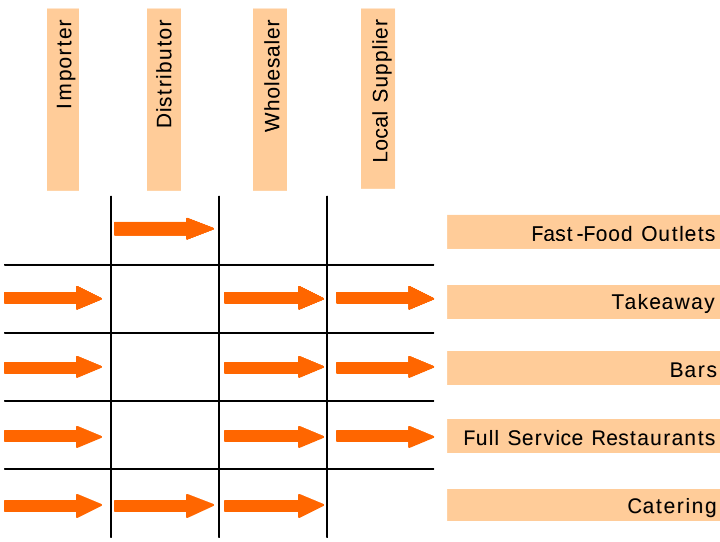
Source: USDA The Hague

Figure 15: Leading Wholesalers/Distributors in the Benelux

Source: USDA The Hague

As figure 16 indicates, small and independent entrepreneurs buy their products and ingredients at the wholesaler that matches their product requirements. There are several wholesalers/distributors in the Benelux, the leading ones are indicated above. In addition to wholesalers, some products are bought directly from importers (meat, fish) or local suppliers (fruit, vegetables, bread, pastry).

Figure 16: Distribution Channel Flow Diagram



Source: USDA The Hague

Fast-food companies are frequently part of a large chain with national, regional or global presence. Products are delivered through proprietary distributors, who normally purchase products for all franchisees.

The profile of Dutch consumers shows signs of long-term transformation. New consumers are more apt to eat out as a leisure or social activity or a convenient alternative to home cooking. They are also more informed, social, health conscious and outward-looking in their consumption attitudes. This offers ample opportunities for new product and service concepts to tap these new interests.

Competition in the Benelux HRI Foodservice market will remain tough as new firms enter the market. Retailers of both food (Makro) and non-food industries (V&D, HEMA, Ikea) have already claimed prominent positions in the market. Operators are always eager to tap into the consumer foodservice market. It is necessary to keep an eye on the movement of prospective competitors from all fronts.

For more information on The HRI Foodservice industry please visit www.fas.usda.gov GAIN NL5005.

Market Overview – Food Processing

Figure 17: Trade Statistics Benelux

	2001	2002	2003	2004	2005
Turnover Food Processing Industry, €	83,341	82,746	83,000	83,250	83,500
Export All Agriculture And Food, €	59,514	64,850	78,095	77,951	80,820
Import All Agriculture And Food, €	41,303	44,560	54,139	56,240	58,180
Balance Trade Agriculture And Food, €	18,210	20,290	23,956	21,711	22,640
Number Food Processors	11,449	11,047	11,000	10,000	10,000

Source: World Trade Atlas, CBS, FEVIA

NOTE: all numbers in table are in million EURO, except estimated number of processors

The food-processing sector in the Benelux, is heavily oriented toward import, transformation and export. While the Belgian-Dutch border separates many food processors, in point of fact major food processors are clustered in a corridor formed by the port cities of Antwerp, Rotterdam and Amsterdam.

These processors serve not only the Benelux market, which would be too small to sustain them, but the entire European market. This international focus gives rise to and sustains a number of features that are unique to the Benelux food processing sector.

Turnover of the Benelux processing industry has been stable at €83,000 for the past five years. The value of imported inputs has gone up but the value of exports has grown even faster, resulting in a trade surplus estimated at €23 billion in 2005.

Knowledgeable traders, Europe's leading ports (Rotterdam, Antwerp and Amsterdam), a good distribution system, a competitive processing industry and efficient marketing systems, make the Benelux an attractive market for trading and processing agricultural products.

Food manufacturing, handling and import regulations are almost completely harmonized within the EU, making regional trade fairly easy. Trade barriers, import regulations, import and transportation costs and time constraints all complicate imports from non-EU countries.

SECTION IV. Best High-Value Product Prospects

Commodity	Total Benelux Imports 2005 X US$ 1,000	Benelux Imports from US 2005 X US$ 1,000	Key Constraints Over Market Development	Market Attractiveness for USA
Pacific Salmon HS:030319	7,833	6,011	price - competition from farmed salmon	growing demand
Cod HS:030360	20,355	4,411	competition from Russia and Norway	growing demand due to lower stocks in European waters and growing consumption
Fish Fillets HS:030420	627,028	45,668	competition from Iceland and China	growing opportunities in the further processing industry
Scallops HS:030721	18,629	7,841	price - lack education customer	growing demand in the high end HRI industry
Prepared Fish HS:1604	436,033	11,206	competition from Morocco, Ecuador and Thailand	the further processing industry has shown growth
Almonds HS:080212	166,494	93,116	US represents 63% of total imports, competition comes from Spain	growing demand from the food ingredients market
Pistachios HS:080250	151,126	99,175	competition from Iran	growing demand from the snack food and confectionary industry
Wine HS:2204	2,020,483	71,949	competition from France, South Africa, Spain and Germany	per capita consumption of wine continues to grow in the Benelux

source: GTIS

To obtain the appropriate commodity code for your product, you can contact the Dutch customs at +31 45 574 3031 or visit the following website http://ec.europa.eu/taxation_customs/dds/en/tarhome.htm. This website also provides tariff classification and rates.

It is also possible to obtain a written binding ruling called a Binding Tariff Information (BTI). This will provide assurances that you have the correct tariff classification for your product. More information on how to apply for BTI is available online at: http://www.douane.nl/zakelijk/invoer/en/invoer-05.html

More information on EU import duties can be found on http://useu.usmission.gov/agri/import.html.

SECTION V. Key Contacts And Further Information

Office of Agricultural Affairs, American Embassy
U.S. Mailing Address: U.S. Embassy/ the Hague, PSC 71 Box 1000 APO AE 09715
International Mailing Address: Lange Voorhout 102, 2514 EJ The Hague, The Netherlands
Phone: 31-70-310-2299
Fax: 31-70-365-7681
e-mail: agthehague@fas.usda.gov

Food Shows Frequently Visited by Benelux Food Buyers

Show	When	Show Organizers
HORECAVA, Amsterdam, The Netherlands Hotel and Restaurant Show	January 08 – 11, 2007	tel: + 31-(0)20-5753032 fax: + 31-(0)20-5753093 www.horecava.nl
European Fine Food Fair Maastricht, The Netherlands Exclusive Hotel and Restaurant Show	January 22 – 24, 2007	MECC Maastricht tel: +31-(0)43-3838383 fax: +31-(0)43-383830 www.efff.nl
National Food Week Utrecht, The Netherlands International food and beverage trade show	March 26 – 28, 2007 Bi-Annual	tel: +31-(0)30-2952799 fax: +31-(0)30-2952814 www.nationalefoodweek.nl
European Seafood Exhibition, Brussels, Belgium One of the world's largest seafood trade show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	April 24 – 26, 2007	tel: +1-207-8425504 fax: +1-207-8425505 www.euroseafood.com
FMI, Chicago, United States The largest international food trade show in North America. **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	May 06 – 08, 2007	tel: +1-202-4528444 fax: +1-202-4294559 www.fmi.org
World of Private Label (PLMA) Amsterdam, The Netherlands Private Label Trade Show	May 22 – 23, 2007	tel: +31-(0)20-5753032 fax: +31-(0)20-5753093 www.plmainternational.com
AGFTOTAAL, Ahoy Rotterdam, The Netherlands World Wide Fruit & Vegetable Trade show	Sept. 10 – 12, 2007 Bi-Annual	tel: +31-(0)10-2933300 fax: +31-(0)10-2933399 www.agftotaal
ANUGA, Cologne, Germany.	October 13 – 17, 2007	tel: +49-180-5204220

Food Shows Frequently Visited by Benelux Food Buyers		
Show	**When**	**Show Organizers**
One of Europe's food & beverages largest trade show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	Bi-Annual	fax: +49-221-821991010 www.anuga.com
Hortifair, Amsterdam, The Netherlands Worldwide Horticultural Trade Fair	Oct. 31 – Nov. 3, 2006 Annual	tel: +31 (0)297-344033 fax: +31 (0)297-326850 www.hortifair.nl info@hortifair.nl
SIAL, Paris, France One of Europe's food & beverages largest trade show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	October, 2008 Bi-Annual Show	tel: +33-(0)1-49685498 fax: +33-(0)1-49685632 www.sial.fr
Horeca Expo, Gent, Belgium Hotel, Restaurant and Catering Show	November 18 – 22, 2007	tel: +32-(0)9-2419211 fax: +32-(0)9-2419475 email: horeca@flandersexpo.be www.horecaexpo.be

APPENDIX

Table A. Key Trade & Demographic Information for the Netherlands & Belgium

The Netherlands

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$25,875 / 4%
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$15,778 / 2%
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$1,221 / 3%
Total Population (Millions) / Annual Growth Rate (%) 2/	16.3 / 0.5%
Number of Major Metropolitan Areas	2
Per Capita Gross Domestic Product (U.S. Dollars) 3/	$30,500
Unemployment Rate (%) 2/	6.6
Per Capita Food Expenditures (U.S. Dollars) 3/	$ 2,475

1/ Source: UN Trade Database CY 2004
2/ Source: Central Bureau of Statistics. 2005
3/ Source: CIA 2005

Belgium

Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$22,263 / 2%
Consumer Food Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$14,600 / 1%
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%) 1/	$1,480 / 1%
Total Population (Millions) / Annual Growth Rate (%) 2/	10.4 / 0.13%
Number of Major Metropolitan Areas	2
Per Capita Gross Domestic Product (U.S. Dollars) 3/	$31,400
Unemployment Rate (%) 2/	8.4
Per Capita Food Expenditures (U.S. Dollars) 2/	$ 2,779

1/ Source: UN Trade Database CY 2004
2/ Source: National Bank of Belgium 2005
3/ Source: CIA 2005

Exchange Rate

Year	U.S. $	EURO
2001	1	1.12
2002	1	1.06
2003	1	0.88
2004	1	0.81
2005	1	0.80
2006*	1	0.80

* Average exchange rate from Jan to Sept.

Table B. Consumer Food & Edible Fishery Product Imports

Netherlands Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
	US$ Million			US$ Million			Percentage		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	11,288	14,457	15,778	343	337	389	3	2	2
Snack Foods (Excl. Nuts)	585	818	914	4	5	7	1	1	1
Breakfast Cereals & Pancake Mix	42	62	87	1	1	1	1	1	0
Red Meats, Fresh/Chilled/Frozen	783	1,132	1,335	1	1	1	0	0	0
Red Meats, Prepared/Preserved	451	549	610	1	1	1	0	0	0
Poultry Meat	293	444	446	0	0	1	0	0	0
Dairy Products (Excl. Cheese)	1,523	1,848	2,064	1	1	20	0	0	1
Cheese	348	472	567	1	1	1	0	0	0
Eggs & Products	97	170	136	1	2	3	1	1	2
Fresh Fruit	1,304	1,869	1,869	24	32	31	2	2	2
Fresh Vegetables	841	1,075	1,138	1	2	1	0	0	0
Processed Fruit & Vegetables	818	988	1,118	31	27	29	4	3	3
Fruit & Vegetable Juices	620	663	641	41	34	39	7	5	6
Tree Nuts	159	266	301	36	54	69	23	20	23
Wine & Beer	654	869	1,037	15	12	8	2	1	1
Nursery Products & Cut Flowers	905	1,053	1,135	54	54	65	6	5	6
Pet Foods (Dog & Cat Food)	137	188	183	12	8	4	9	4	2
Other Consumer-Oriented Products	1,727	1,992	2,198	122	106	112	7	5	5
FISH & SEAFOOD PRODUCTS	936	1,167	1,221	21	27	36	2	2	3
Salmon	44	34	44	6	7	10	14	21	23
Surimi	7	12	23	1	1	2	1	2	8
Crustaceans	258	276	245	1	1	1	0	0	0
Groundfish & Flatfish	315	458	512	8	11	11	3	2	2
Molluscs	44	73	68	3	5	6	7	6	9
Other Fishery Products	268	313	329	3	4	5	1	1	2
AGRICULTURAL PRODUCTS TOTAL	19,071	23,454	25,875	1,131	1,136	1,119	6	5	4
AGRICULTURAL, FISH & FORESTRY TOTAL	21,673	26,610	29,479	1,180	1,191	1,181	5	4	4

Source: United Nations Statistics Division

Belgium Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
	US $ Million			US $ Million			Percentage		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	10,313	13,030	14,600	154	150	158	1	1	1
Snack Foods (Excl. Nuts)	686	863	917	2	2	2	0	0	0
Breakfast Cereals & Pancake Mix	76	105	115	1	1	1	0	0	0
Red Meats, Fresh/Chilled/Frozen	500	639	766	8	8	7	2	1	1
Red Meats, Prepared/Preserved	353	467	538	1	1	1	0	0	0
Poultry Meat	230	304	319	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	1,185	1,553	1,767	1	1	3	0	0	0
Cheese	782	982	1,014	0	1	0	0	0	0
Eggs & Products	67	89	103	1	3	1	1	3	0
Fresh Fruit	1,617	2,161	2,587	13	14	14	1	1	1
Fresh Vegetables	542	680	739	1	1	1	0	0	0
Processed Fruit & Vegetables	791	951	1,011	15	12	11	2	1	1
Fruit & Vegetable Juices	467	519	565	25	13	14	5	2	2
Tree Nuts	153	175	209	39	44	51	26	25	24
Wine & Beer	873	1,035	1,153	3	3	4	0	0	0
Nursery Products & Cut Flowers	313	385	444	6	6	12	2	2	3
Pet Foods (Dog & Cat Food)	253	332	341	14	19	14	5	6	4
Other Consumer-Oriented Products	1,424	1,790	2,013	26	26	27	2	1	1
FISH & SEAFOOD PRODUCTS	1,094	1,381	1,480	16	16	21	1	1	1
Salmon	68	81	87	3	3	4	5	3	5
Surimi	2	3	4	1	1	1	4	2	0
Crustaceans	372	501	520	2	2	1	1	0	0
Groundfish & Flatfish	328	381	449	4	4	7	1	1	2
Molluscs	107	146	157	2	2	5	2	2	3
Other Fishery Products	217	269	263	5	5	3	2	2	1
AGRICULTURAL PRODUCTS TOTAL	16,047	19,978	22,263	483	504	452	3	3	2
AGRICULTURAL, FISH & FORESTRY TOTAL	18,731	23,317	26,007	548	566	512	3	2	2

Source: United Nations Statistics Division

Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Netherlands Imports - Top 15 Ranking

$1,000	2002	2003	2004
Germany	2,426,136	3,343,596	3,666,101
Belgium	1,972,376	2,529,865	2,805,432
France	915,198	1,190,688	1,248,940
Spain	759,487	1,038,832	1,096,337
Brazil	652,581	790,554	797,930
United Kingdom	469,173	564,828	607,673
Italy	272,141	388,576	432,990
United States	343,144	337,448	388,731
Ireland	239,976	331,162	382,118
South Africa	258,959	389,648	375,655
Denmark	188,369	256,947	283,393
Chile	172,025	238,060	236,122
Poland	102,899	120,438	233,826
Kenya	151,120	194,804	229,846
Thailand	161,184	168,911	227,450
Others	2,203,004	2,572,614	2,765,221
World	11,287,772	14,456,971	15,777,765

Source: United Nations Statistics Division

FISH & SEAFOOD PRODUCTS
Report: Netherlands Imports - Top 15 Ranking

$1,000	2002	2003	2004
Germany	177,645	236,211	241,743
Belgium	79,055	144,632	163,605
Denmark	98,857	103,923	112,070
United Kingdom	90,314	119,502	107,880
China (Peoples Republic of)	9,233	25,480	41,239
Indonesia	28,632	39,772	39,945
France	42,049	34,725	39,449
Tanzania	32,086	38,265	36,819
United States	21,184	26,846	35,637
Morocco	40,936	50,328	32,934
Nigeria	20,888	25,368	29,666
Vietnam	7,312	9,975	24,214
Norway	22,628	17,830	20,946
Ireland	9,877	12,661	16,047
Sweden	7,516	12,792	16,011
Others	247,718	269,138	262,682
World	935,930	1,167,448	1,220,887

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Belgium Imports - Top 15 Ranking

$1,000	2002	2003	2004
France	2,751,968	3,428,595	3,615,023
Netherlands	2,402,525	3,030,342	3,327,148
Germany	1,257,918	1,699,852	1,807,070
Italy	394,918	516,349	591,152
Spain	405,381	534,280	582,008
United Kingdom	332,165	411,307	465,610
New Zealand	287,680	385,447	442,725
Colombia	202,640	271,437	416,741
Costa Rica	203,183	289,721	377,995
Brazil	275,233	298,731	358,631
Ecuador	90,116	139,938	209,440
Argentina	138,068	153,513	166,959
United States	154,159	150,482	158,321
South Africa	172,137	153,870	151,990
Ireland	79,435	105,149	135,440
Rest of World	1,165,076	1,461,149	1,794,012
World	10,312,602	13,030,162	14,600,265

Source: United Nations Statistics Division

FISH & SEAFOOD PRODUCTS
Report: Belgium Imports - Top 15 Ranking

$1,000	2002	2003	2004
Netherlands	276,558	347,927	365,316
France	105,342	125,951	148,178
Denmark	79,992	93,803	92,519
Germany	66,410	82,472	77,746
Bangladesh	47,849	74,554	70,733
Iceland	34,408	46,792	68,545
United Kingdom	59,791	69,683	66,629
India	23,549	50,905	63,406
Indonesia	17,304	39,471	50,585
Uganda	40,957	32,979	45,233
Vietnam	18,462	33,383	43,571
Canada	28,593	35,016	36,009
China	4,886	20,504	28,182
Sweden	16,670	22,663	25,371
Tanzania	38,746	27,428	22,504
Other	234,015	277,096	275,970
World	1,093,532	1,380,627	1,480,497