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Netherlands

Exporter Guide

Annual

2007

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

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

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Section 1. Market Overview

The Netherlands

Economic growth in 2007 is expected to slow slightly to an estimated 2.75%, down from 3% in 2006. This somewhat negative trend is expected to continue in 2008. Based on current budget proposals, the Netherlands Bureau for Economic Policy Analysis (CPB) expects the economy to grow by 2.5% in 2008.

Although somewhat slower, the most important factor behind overall economic growth remains exports. Growth in exports dropped from 9.6% and 7.7% in the first two quarters of 2006 to 6.5% and 5.1% in the first two quarters of 2007. In 2007, consumer spending is expected to grow by 2%, matching 2006 growth levels.

Inflation has been below the euro area average (1.8% in 2006) for the last four years and is estimated to equal 1.5% in 2007. The difference between the inflation rate in the Netherlands and the eurozone average is partly due to a price war among major super market franchises, which has helped to drive the prices of food and beverages to well below the eurozone average.

Figure 1: Key Data Dutch Economy

	2006	2007*	2008**
Economic Growth %	3.25	2.75	2.5
Inflation (CPI) %	1.25	1.5	2
Unemployment %	5.5	4.5	4
GDP	€ 508 billion	€ 534 billion	Growth 2.5%

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

Belgium

Economic growth in 2007 is expected to increase by 2.3% down from 3.1% in 2006. Inflation is expected to be 1.5% this year, lower compared to last year's percentage. Unemployment in Belgium is slightly lower than EU average (8.5%). Just like the Dutch, the Belgians spend around 15% of their total spending on food.

Figure 2: Key Data Belgian Economy

	2006	2007*	2008**
Economic Growth %	3.1	2.3	2.2
Inflation (CPI) %	1.8	1.5	1.5
Unemployment %	8.2	7.6	7.4
GDP, in billion	€302	€309	€316

Source: www.nbb.be
* estimates, ** forecast

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

US exports to Belgium/Netherlands/Luxembourg	CY 2004	CY 2005	CY 2006	Jan-July 2006	Jan-July 2007
Consumer-Oriented Agricultural Total	755,629	861,107	913,467	508,256	536,909
Snack Foods (Excl Nuts)	10,816	12,581	11,527	6,085	10,848
Breakfast Cereals & Pancake Mix	3,870	1,553	1,419	829	1,778
Red Meats, Fresh/Chilled/Frozen	18,933	34,084	33,442	18,056	21,546
Red Meats, Prepared/Preserved	1,510	1,289	1,456	321	587
Poultry Meat	1,070	651	581	313	486
Dairy Products	23,446	10,374	28,752	10,441	22,365
Eggs & Products	2,722	3,876	7,663	4,167	10,794
Fresh Fruit	37,108	42,745	27,733	13,216	19,455
Fresh Vegetables	11,229	8,781	8,154	6,313	6,357
Processed Fruit & Vegetables	54,265	57,511	71,353	39,956	43,835
Fruit & Vegetable Juices	103,226	94,362	125,055	80,526	72,636
Tree Nuts	208,903	335,412	337,678	169,378	177,734
Wine & Beer	99,622	46,272	47,479	31,619	18,025
Nursery Products & Cut Flowers	64,649	64,175	67,024	37,612	50,491
Pet Foods (Dog & Cat Food)	18,553	26,812	33,240	19,677	15,040
Other Consumer-Oriented Products	95,707	120,630	110,909	69,945	127,933
Fish & Seafood Products, Edible	138,183	183,161	206,531	85,618	91,497
Salmon, Whole Or Eviscerated	6,290	11,158	10,916	1,095	2,421
Salmon, Canned	7,225	9,124	9,924	4,789	4,820
Crab & Crabmeat	125	341	1,469	1,218	656
Surimi (Fish Paste)	3,842	14,995	10,735	4,359	416
Roe & Urchin (Fish Eggs)	5,673	4,752	3,300	850	2,058
Other Edible Fish & Seafood	115,028	142,790	170,187	73,308	81,127

Source: Bico

Key Developments and the Impact on Consumer Buying Habits

- The Benelux has over 26.8 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.

- During the past decades more and more women have entered the labor force, especially in times of economic growth. In these double income households, time has become scarce. In their spare time they want to focus on their family, health and travel. Daily cooking is not on that priority list. This group of consumers is willing to pay additional money for variety, taste, and health in food. As a result of increased purchases of meal components and ready-to-cook products, consumers are less knowledgeable about how to cook and prepare meals.

- Another development that drives changing consumer buying habits is the on-going trend towards smaller households. There are some 11.6 million households with an average size of 2.3 people. Single and two person households are growing and households of 4 or more persons declining. Not only does this trend demand smaller portions, industry contacts also claim that consumers tend to buy more expensive, value added products or meal components when cooking for only one or two persons.

- The Benelux population is graying. Last year, the age group of 55 years and older accounted for 26.4% of the population while 10 years ago this number was only 22.8%. Especially the growing age group of 55-65 years old has relatively high purchasing power. In general they have paid off the mortgage on their house and benefit from a good pension.

Figure 4: Key Demographic Figures for the Benelux

	2004	2005	2006
Population	26.6 million	26.7 million	26.8 million
Number of Households	11.4 million	11.5 million	11.6 million
Household Size	2.3	2.3	2.3

Source: CBS, Statbel

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
2007*	24.2	26.4	34.9	10.8	3.7	16,357,992

Source: CBS, *estimate from CBS

Figure 6: Main Non-Dutch Population by Ethnicity

	2003	2004	2005	2006	2007*
Indonesian	400,622	398,502	396,080	393,057	389,940
Turkish	341,400	351,648	358,846	364,333	368,600
Surinamese	320,658	325,281	329,430	331,890	333,504
Moroccan	295,332	306,219	315,821	323,239	329,493
Netherlands Antilles & Aruba	129,312	130,722	130,538	129,683	129,965

Source: CBS
*estimates

Figure 7: Main Non-Belgian Population by Ethnicity

	2003	2004	2005	2006
Italian	193,000	190,000	186,000	171,282
French	113,000	115,000	118,000	129,889
Dutch	92,000	94,000	97,000	122,671
Moroccan	106,000	101,000	94,000	79,694
Turkish	59,000	56,000	53,000	41,808

Source: www.dofi.fgov.be

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

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

Changing Tastes

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 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%. More information on this subject can be found on http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN NL 7021.

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 be 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 consumers 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.

Awareness of Health and Well-Being

Consumers are becoming more aware and concerned about foods and their impact on health and well-being. The drivers behind this trend are the following; the occurrence of several food scares (like BSE and Dioxin scare), the fight against obesity and finally the desire to live a healthy and fit life. More information in this area and having access to this information has increased awareness. TV, magazines and the Internet continue to play an important role in getting the message across. Food processors and retailers play a crucial role as well; in the end they decide what the consumer is being offered.

Section 2. 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 speaks English and has 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 weaker dollar, more than before looking for added value, healthy or unique products from the U.S. for their customer.

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: NL7017 and BE7003.
http://www.fas.usda.gov/scriptsw/attacherep/default.asp

Section 3. Market Sector Structure and Trends

The Food Retail Market

In 2006, the turnover of the total food retail industry was 48 billion USD. The consolidated full service supermarkets sector makes around 90% of total food retail sales. The remaining 10% covers food sales made at department stores, delicatessen stores and non-food stores.

Supermarkets

The supermarket industry in the Benelux is highly consolidated and quite often supermarket organizations even work together in purchase organizations, which consolidates the market even more. The figures below reflect the level of consolidation.

Figure 10: Supermarket Chains 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: Supermarket Chains 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, also the upscale department stores and delicatessen stores that start selling specialty food products and drinks.

Department Stores

Department stores, generally part of a larger chain, offer only specialty foods. More and more the traditionally non-food upscale department stores are moving into selling food products although still on a small scale. They have become an excellent outlet for selling specialty foods. They mainly focus on innovative and season or event related specialty products. Some smaller independent non-food stores follow this trend as well. Other non-food retail chains (like De Tuinen and Xenos) have moved into food retailing as well, by focusing on healthy foods, Asian and Mediterranean cuisines.

Figure 12: Leading Department Stores in the Benelux

Company Name	Website
Bijenkorf	www.bijenkorf.nl
Hema	www.hema.nl
Inno	www.inno.be
V&D	www.vd.nl

Source: USDA

Delicatessen Stores

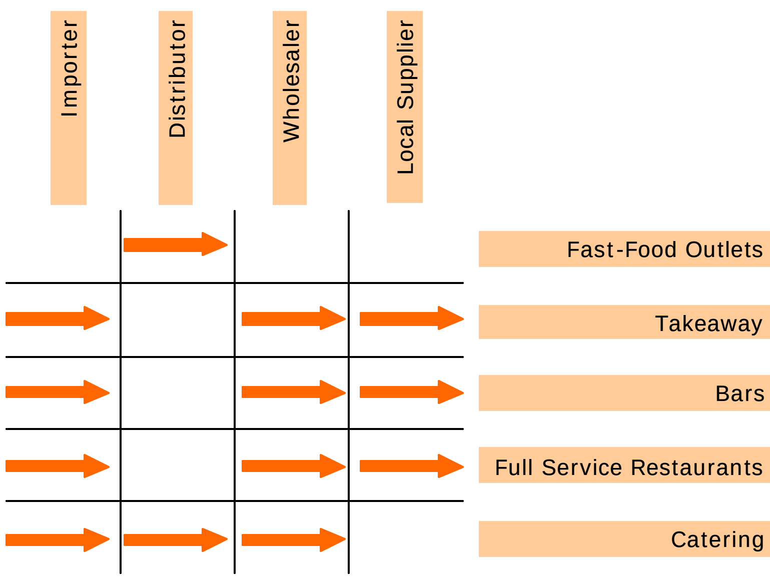
Traditional butcher and fruit & vegetable shops but also small independent family run supermarkets are losing market share. The supermarkets are either bought by big retailer chains or are closed down. The traditional butcher and fruit & vegetable shops are increasingly changing into delicatessen shops and the majority of these have moved into making meal components or into catering. 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.

The Foodservice Market

Figures indicate that almost 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 35 percent of total food expenditures. 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 2006 was almost €19 billion.

Restaurants dominate the Benelux foodservice industry and make up roughly 50% of the industry. Restaurant owners are generally independent operating entrepreneurs, working with both local suppliers and wholesalers. An overview of leading Dutch wholesalers and distributors are detailed in Appendix 1. The 2nd largest foodservice segment covers all cafés and bars, where the focus is mainly on serving drinks and to a much lesser extent finger foods and basic meals. Finally, a handful of international and national players dominate the much smaller fast food (20%) and catering industry (10%) and their products are delivered through proprietary large distributors. For more information on the HRI foodservice market please visit www.fas.usda.gov GAIN NL5005.

Figure 13: Distribution Channel Flow Diagram



Source: USDA The Hague

Unfortunately, the same obstacles that limit sales to the retail sector hamper potential U.S. sales to the foodservice industry. 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.

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. More information on this subject can be found on http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN NL 7021.

The Food Processing Market

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 Ghent, Antwerp, Rotterdam and Amsterdam.

Figure 14: Trade Statistics Benelux, (excluding intra Benelux trade)

	2005	2006
Turnover Food Processing Industry	83,500	84,250
Export Agriculture, Fish and Forestry Products	72,705	79,431
Import Agriculture, Fish and Forestry Products	52,169	56,930
Net Export, € million	20,536	22,501
Number Food Processors	10,000	9,750

Source: World Trade Atlas, CBS, FEVIA
NOTE: all numbers in this figure are in million EUROS, except estimated number of processors

These processors serve not only the Benelux market, which would be too small to sustain them, but also 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 around €84,000 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 almost €23 billion in 2006.

Knowledgeable traders, Europe's leading ports (Rotterdam, Antwerp, Amsterdam and Ghent), 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. However, trade barriers, import regulations, import and transportation costs and time constraints all complicate imports from non-EU countries.

Section 4. Best High-Value Product Prospects

Commodity	Total Benelux Imports 2006 X US$ 1,000	Benelux Imports from US 2006 X US$ 1,000	Key Constraints Over Market Development	Market Attractiveness for USA
Fish Fillets HS: 030420	712,349	31,577	competition from Iceland and China	growing opportunities in the further processing industry
Cod HS: 030360	21,759	9,228	competition from Russia and Norway	growing demand due to lower stocks in European waters and growing consumption
Scallops HS: 030721	14,915	9,011	price - lack education customer	growing demand in the high end HRI industry
Rock lobster HS: 030611	12,678	4,040	No real competition	growing demand in the high end HRI industry
Food preparations HS: 210690	694,022	110,597	competition from Germany and Switzerland	the Benelux has an export focused and big food processing industry
Almonds HS: 080212	184,893	117,734	US represents 63% of total imports, some competition comes from Spain	growing demand from the food ingredients market
Pistachios HS: 080250	111,896	81,744	competition from Iran	growing demand from the snack food and confectionary industry
Wine HS: 2204	1,900,390	44,598	competition from France, Germany and New World Wine countries	per capita consumption of wine continues to grow in the Benelux

source: World Trade Atlas

Section 5. Key contacts and Further Information

U.S. Embassy
Office of Agricultural Affairs, Marcel Pinckaers
Lange Voorhout 102, 2514 EJ The Hague, The Netherlands
U.S. Mailing Address: U.S. Embassy/ the Hague, PSC 71 Box 1000 APO AE 09715
Phone: +31-70-310-2305
Fax: +31-70-365-7681
E-mail: marcel.pinckaers@fas.usda.gov
Website: www.usembassy.nl/fas.html or www.fas.usda.gov

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.

Marketing
An overview of leading trade shows can be found in Appendix 2

Reports
Related Reports from FAS/The Hague and other European offices can be found on http://www.fas.usda.gov/scriptsw/attacherep/default.asp.

Report Number	Report Title	Date Released
NL5005	HRI Foodservice Industry	03/2005
NL5010	Food Processing Industry	03/2005
NL5035	Food Retail Industry	11/2005
NL6009	Dutch Snack and Confectionary Market	03/2006
NL6017	Consolidation Food Retail Market	06/2006
NL6024	Benelux Organic Market	07/2006
NL7002/BE7001	Benelux Tree Nuts Market	01/2007
NL7008	Benelux Beef Market	04/2007
NL7017/BE7003	FAIRS	08/2007
NL7021	Dutch Specialty Foods	09/2007
NL7026	Export Certification Guide	09/2007

For more information on how to export to the Benelux market and above subjects, please contact Marcel Pinckaers at marcel.pinckaers@usda.gov or +31 (0)70-3102 305.

Appendix 1. Leading Wholesalers/Distributors in the Benelux
(in alphabetic order)

Deli XL
Mr. D. Slootweg
P.O. Box 440
Frankeneng 18
6710 BK, Ede, the Netherlands
P: 31-(0)318-678911
F: 31-(0)318-622347
E: dick.slootweg@ahold.nl
W: www.delixl.nl

Hanos
Mr. V. Looijengoed
P.O. Box 10378
Stadhoudersmolenweg 37
7301 GJ, Apeldoorn, the Netherlands
P: 31-(0)55-5294444
F: 31-(0)55-5224621
E: hvanlooijengoed@hanos.nl
W: www.hanos.nl

ISPC
Mr. M. Vugts
Kalshoven 25
4825 AL, Breda, the Netherlands
P: 31-(0)76-5726726
F: 31-(0)76-5726810
E: mvugts@ispc-int.com
W: www.ispc-int.com

De Kweker
Mr. P. Poelstra
P.O. Box 59345
Jan van Gaalenstraat 4
1040 KH, Amsterdam, the Netherlands
P: 31-(0)20-6063606
W: 31-(0)20-6063600

Makro (Metro Cash & Carry)
Mr. J. Cervera
Diermervijver, Gebouw Vijverpoort,
Dalsteindreef 101-139
1112 XC Diemen, the Netherlands
P: 31-(0)20-3980200
F: 31-(0)20-3980201
www.makro.nl

Sligro
Mr. R. van Herpen
P.O. Box 47
Corridor 11
5460 AA, Veghel, the Netherlands
P: 31-(0)413-343500
F: 31-(0)413-341520
I: info@sligro.nl
W: www.sligro.nl

Appendix 2. Trade Shows

Food Shows Frequently Visited by Benelux Food Buyers		
Show	When	Show Organizers
HORECAVA, Amsterdam, The Netherlands Hotel and Restaurant Show	January 07 – 10, 2008	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 21 – 23, 2008	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, 2009 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 22 – 24, 2008	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 04 – 07, 2008	tel: +1-202-4528444 fax: +1-202-4294559 www.fmi.org
World of Private Label (PLMA) Amsterdam, The Netherlands Private Label Trade Show	May 27 – 28, 2008	tel: +31-(0)20-5753032 fax: +31-(0)20-5753093 www.plmainternational.com
Fresh Rotterdam, Rotterdam, The Netherlands Fruit & Vegetable Trade show	September, 2009 Bi-Annual	tel: +31-(0)10-2933300 fax: +31-(0)10-2933399 www.freshrotterdam.nl
ANUGA, Cologne, Germany. One of Europe's food & beverages largest trade show	October 13 – 17, 2007 Bi-Annual	tel: +49-180-5204220 fax: +49-221-821991010 www.anuga.com

Food Shows Frequently Visited by Benelux Food Buyers		
Show	When	Show Organizers
USDA Endorsed Show Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov		
Hortifair, Amsterdam, The Netherlands Worldwide Horticultural Trade Fair	October 09 – 12, 2007 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 19 -23, 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

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

The Netherlands

Agricultural, Fish and Forestry Imports From All Countries ($Mil) / U.S. Market Share (%)	$38,281 / 3.9%
Consumer Oriented Food Imports From All Countries ($Mil) / U.S. Market Share (%)	$20,585 / 2.9%
Fish and Seafood Imports From All Countries ($Mil) / U.S. Market Share (%)	$2,256 / 3.5%
Total Population (Millions) / Annual Growth Rate (%)	16.4 / 0.6%
Number of Major Metropolitan Areas	4 (Amsterdam, Rotterdam, The Hague, Utrecht)
Per Capita Gross Domestic Product (U.S. Dollars)	$ 38,814
Unemployment Rate (%)	5.5
Per Capita Food Expenditures (U.S. Dollars)	$ 2,575

Source: World Trade Atlas

Belgium

Agricultural, Fish and Forestry Imports From All Countries ($Mil) / U.S. Market Share (%)	$29,721 / 1.9%
Consumer Oriented Food Imports From All Countries ($Mil) / U.S. Market Share (%)	$16,496 / 1.3%
Fish and Seafood Imports From All Countries ($Mil) / U.S. Market Share (%)	$1,886 / 2.1%
Total Population (Millions) / Annual Growth Rate (%)	10.4 / 0.2%
Number of Major Metropolitan Areas	2 (Brussels, Antwerp)
Per Capita Gross Domestic Product (U.S. Dollars)	$ 36,159
Unemployment Rate (%)	8.2
Per Capita Food Expenditures (U.S. Dollars)	$ 2,879

Source: World Trade Atlas

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
2007*	1	0.75

* Average exchange rate from Jan to Sept.

Table B. Consumer Food & Edible Fishery Products Imports

Netherlands Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
	2004	2005	2006	2004	2005	2006	2004	2005	2006
	US $ Million			US $ Million			US $ Million		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	17,385	18,385	20,585	513	546	596	2.95	2.97	2.89
Snack Foods (Excl. Nuts)	933	973	1,100	7	8	5	0.74	0.83	0.47
Breakfast Cereals & Pancake Mix	87	73	85	0	0	0	0.5	0.45	0.35
Red Meats, Fresh/Chilled/Frozen	1,410	1,489	1,880	4	5	6	0.3	0.36	0.34
Red Meats, Prepared/Preserved	685	704	765	0	1	0	0.00	0.08	0.06
Poultry Meat	492	556	528	0	0	0	0.00	0.00	0.00
Dairy Products (Excl. Cheese)	2,084	2,134	2,230	20	1	15	0.98	0.05	0.67
Cheese	567	578	611	0	0	0	0.00	0.06	0.05
Eggs & Products	125	130	135	3	5	5	2.40	3.75	3.43
Fresh Fruit	2,121	2,627	3,025	32	35	26	1.52	1.32	0.86
Fresh Vegetables	1,181	1,235	1,427	1	3	5	0.13	0.21	0.35
Processed Fruit & Vegetables	1,334	1,307	1,441	42	34	37	3.14	2.62	2.53
Fruit & Vegetable Juices	938	934	1,129	72	60	71	7.71	6.44	6.30
Tree Nuts	321	477	557	74	128	171	23.19	26.87	30.72
Wine & Beer	1,120	1,126	1,132	64	70	40	5.70	6.21	3.55
Nursery Products & Cut Flowers	1,185	1,240	1,366	65	58	58	5.52	4.71	4.26
Pet Foods (Dog & Cat Food)	183	203	202	4	6	7	2.02	3.05	3.67
Other Consumer-Oriented Products	2,620	2,598	2,973	123	131	148	4.69	5.04	4.98
FISH & SEAFOOD PRODUCTS	1,810	2,041	2,256	67	86	78	3.71	4.20	3.47
Salmon	46	52	75	11	11	12	22.93	21.60	16.04
Surimi	35	35	45	6	7	2	16.02	19.33	5.07
Crustaceans	337	377	417	1	2	5	0.38	0.43	1.18
Groundfish & Flatfish	838	933	1,053	35	47	38	4.22	5.06	3.65
Molluscs	86	92	117	9	14	14	10.26	15.12	11.58
Other Fishery Products	468	551	548	5	5	7	1.17	0.91	1.26
AGRICULTURAL PRODUCTS TOTAL	29,493	30,378	32,967	1,420	1,231	1,381	4.81	4.05	4.19
AGRICULTURAL, FISH & FORESTRY TOTAL	33,804	34,900	38,281	1,517	1,346	1,494	4.49	3.86	3.90

Source: World Trade Atlas

Belgium Imports	Imports from the World			Imports from the U.S.			U.S Market Share		
	2004	2005	2006	2004	2005	2006	2004	2005	2006
	US $ Million			US $ Million			US $ Million		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	15,028	15,492	16,496	159	182	214	1.06	1.18	1.29
Snack Foods (Excl. Nuts)	914	946	967	2	1	2	0.17	0.14	0.17
Breakfast Cereals & Pancake Mix		105	128	0	0	0	0.28	0.38	0.21
Red Meats, Fresh/Chilled/Frozen	766	841	893	7	10	9	0.94	1.14	1.01
Red Meats, Prepared/Preserved	541	566	594	0	0	0	0.01	0.00	0.01
Poultry Meat	322	337	301	0	0	0	0.00	0.00	0.00
Dairy Products (Excl. Cheese)	1,744	1,676	1,672	3	3	3	0.18	0.18	0.15
Cheese	1,015	1,043	1,077	0	0	0	0.00	0.00	0.00
Eggs & Products	100	85	100	0	1	0	0.08	0.83	0.23
Fresh Fruit	2,575	2,628	2,800	14	19	28	0.55	0.73	1.00
Fresh Vegetables	741	773	892	0	0	0	0.05	0.03	0.01
Processed Fruit & Vegetables	1,091	1,148	1,240	11	14	16	1.03	1.25	1.26
Fruit & Vegetable Juices	575	572	733	13	6	12	2.33	1.11	1.61
Tree Nuts	213	296	261	50	59	63	23.47	19.91	23.93
Wine & Beer	1,184	1,184	1,240	4	3	5	0.31	0.24	0.40
Nursery Products & Cut Flowers	440	458	474	12	13	24	2.79	2.88	5.02
Pet Foods (Dog & Cat Food)	338	349	385	14	18	24	4.17	5.10	6.24
Other Consumer-Oriented Products	2,352	2,487	2,739	28	34	29	1.17	1.38	1.06
FISH & SEAFOOD PRODUCTS	1,514	1,631	1,886	21	31	40	1.36	1.91	2.13
Salmon	88	98	118	4	4	7	4.92	3.61	5.67
Surimi	4	8	9	0	0	0	0.25	0.00	0.59
Crustaceans	546	584	702	1	2	2	0.24	0.30	0.34
Groundfish & Flatfish	450	491	547	7	5	5	1.56	0.92	0.86
Molluscs	161	182	211	5	17	20	3.19	9.07	9.67
Other Fishery Products	266	267	300	3	5	6	1.06	1.78	2.01
AGRICULTURAL PRODUCTS TOTAL	22,920	23,695	25,149	453	488	482	1.98	2.06	1.91
AGRICULTURAL, FISH & FORESTRY TOTAL	26,687	27,711	29,721	513	556	560	1.92	2.01	1.88

Source: World Trade Atlas

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

CONSUMER-ORIENTED AGRICULTURAL TOTAL

Report: Netherlands Imports - Top 15 Ranking

$1,000	2004	2005	2006
Germany	3,830,937	3,956,932	4,352,899
Belgium	2,912,038	2,859,563	3,040,564
France	1,287,594	1,251,517	1,475,816
Brazil	1,022,788	1,171,720	1,331,409
Spain	1,112,265	1,140,836	1,202,776
United Kingdom	636,822	548,204	623,721
South Africa	476,427	618,799	605,016
United States	513,135	545,854	595,885
Italy	458,467	488,462	506,659
Chile	292,128	426,686	464,252
Poland	235,251	347,876	459,754
Ireland	392,085	403,561	416,044
China	232,305	299,510	413,744
New Zealand	260,502	288,230	350,918
Costa Rica	165,891	193,605	331,550
Other	3,556,153	3,843,303	4,414,257
World	17,384,788	18,384,658	20,585,264

Source: World Trade Atlas

FISH & SEAFOOD PRODUCTS

Report: Netherlands Imports - Top 15 Ranking

$1,000	2004	2005	2006
Iceland	306,451	343,928	394,939
Germany	242,389	292,419	277,522
Belgium	163,408	124,951	149,860
Denmark	118,802	140,150	135,840
United Kingdom	108,041	117,740	134,046
China	82,710	129,867	131,269
Vietnam	27,299	45,191	103,890
United States	67,213	85,831	78,183
Norway	31,701	33,582	53,772
Morocco	43,881	53,809	51,272
France	39,906	48,096	49,850
Russia	23,282	30,417	46,460
Tanzania	43,907	38,974	44,481
Bangladesh	13,616	15,471	42,699
Thailand	19,655	33,130	41,961
Other	477,563	507,801	520,299
World	1,809,824	2,041,357	2,256,343

CONSUMER-ORIENTED AGRICULTURAL TOTAL

Report: Belgium Imports - Top 15 Ranking

$1,000	2004	2005	2006
France	3,824,745	3,822,446	4,133,697
Netherlands	3,398,158	3,459,829	3,629,290
Germany	1,888,105	1,974,305	2,083,771
Spain	595,489	654,059	696,691
Italy	617,088	671,221	656,548
Brazil	370,878	390,085	496,246
United Kingdom	477,874	435,295	458,127
Colombia	416,997	442,700	452,956
New Zealand	436,861	448,659	438,642
Costa Rica	376,551	364,117	350,922
Ecuador	209,185	224,244	267,429
Ireland	132,339	134,043	227,883
United States	159,132	182,199	213,533
Argentina	164,425	176,566	156,607
South Africa	145,599	138,912	140,919
Others	1,814,799	1,973,082	2,092,594
World	15,028,225	15,491,762	16,495,855

Source: World Trade Atlas

FISH & SEAFOOD PRODUCTS

Report: Belgium Imports - Top 15 Ranking

$1,000	2004	2005	2006
Netherlands	378,656	414,513	434,145
France	162,495	163,125	190,683
Denmark	92,504	97,169	106,937
Germany	78,506	83,204	102,882
Bangladesh	70,568	76,285	96,609
India	63,243	70,267	96,420
Iceland	68,631	86,504	87,673
Vietnam	44,862	59,982	83,119
United Kingdom	66,572	63,734	79,144
Indonesia	50,409	43,467	65,350
China	27,884	49,386	62,626
Uganda	45,464	63,275	52,618
Canada	36,368	46,168	52,113
United States	20,601	31,073	40,254
Chile	17,705	18,754	27,048
Other	289,655	263,600	308,638
World	1,514,123	1,630,506	1,886,259