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# Netherlands

# Exporter Guide

# Benelux

# 2008

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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]

## Section 1. Market Overview


**The Netherlands**

Economic growth in 2008 is expected to slow down to an estimated 2.25%, down from 3.5% in 2007. This negative trend is expected to continue. Based on current budget proposals, the Netherlands Bureau for Economic Policy Analysis (CPB) expects the economy to grow only by 1.25% in 2009.

Although the growth in exports has declined, exporting remains the most important factor in the growth of the total economy. Trade volumes grew less in 2007 than in 2006. In 2007 imports were up 6 percent and exports 8 percent, versus 10 and 9 percent, respectively, in 2006. In 2008, consumer spending is expected to grow minimally by 1.5%, dropping from 2.1% in 2007. Inflation has been below the euro-zone average for the last four years and is forecast to equal 2.3% in 2008.

Figure 1: Key Data Dutch Economy

| | 2006 | 2007 | 2008* | 2009** |
|---|---|---|---|---|
| Economic Growth % | 3.25 | 3.5 | 2.25 | 1.25 |
| Inflation (HIPC) % | 1.7 | 1.6 | 2.3** | n.a. |
| Unemployment % | 5.5 | 4.5 | 4 | 4.25 |
| GDP (billion) | €534 | €560 | €573 | €580 |

Source: Central Bureau of Statistics
* estimate
** forecast

**Belgium**

Economic growth in 2008 is expected to be 1.9%, down from 2.9% in 2007. Inflation is expected to be 4.1% this year, more than double last year's rate. Unemployment in Belgium is slightly higher than the EU average (7.5%). Just like the Dutch, the Belgians spend around 15% of their total spending on food.

Figure 2: Key Data Belgian Economy

| | 2006 | 2007 | 2008* | 2009** |
|---|---|---|---|---|
| Economic Growth % | 2.9 | 2.9 | 3.1 | n.a. |
| Inflation (CPI) % | 2.3 | 1.8 | 4.1 | 2.3 |
| Unemployment % | 8.3 | 7.5 | 6.9 | 6.8 |
| GDP (billion) | €311 | €320 | €326 | n.a. |

Source: www.nbb.be
* estimate
** forecast

Figure 3: U.S. Exports Of Consumer-Oriented Agricultural And Fish & Seafood Products (in 1,000 U.S.$)

| US exports to Belgium/Netherlands/Luxembourg | CY **2005** | CY **2006** | CY **2007** | Jan-July **2007** | Jan-July **2008** |
|---|---|---|---|---|---|
| **Consumer-Oriented Agricultural Total** | 861,107 | 913,467 | 950,101 | 537,164 | 635,325 |
| Snack Foods (Excl Nuts) | 12,581 | 11,527 | 21,662 | 10,803 | 11,816 |
| Breakfast Cereals & Pancake Mix | 1,553 | 1,419 | 2,570 | 1,791 | 1,963 |
| Red Meats, Fresh/Chilled/Frozen | 34,084 | 33,442 | 42,583 | 21,956 | 39,541 |
| Red Meats, Prepared/Preserved | 1,289 | 1,456 | 716 | 597 | 886 |
| Poultry Meat | 651 | 581 | 1,328 | 510 | 3,016 |
| Dairy Products | 10,374 | 28,752 | 72,351 | 22,365 | 44,358 |
| Eggs & Products | 3,876 | 7,663 | 14,133 | 10,794 | 5,510 |
| Fresh Fruit | 42,745 | 27,733 | 33,698 | 19,420 | 29,374 |
| Fresh Vegetables | 8,781 | 8,154 | 8,492 | 6,296 | 8,421 |
| Processed Fruit & Vegetables | 57,511 | 71,353 | 75,691 | 43,835 | 58,616 |
| Fruit & Vegetable Juices | 94,362 | 125,055 | 114,829 | 72,703 | 76,463 |
| Tree Nuts | 335,412 | 337,678 | 307,213 | 177,734 | 181,828 |
| Wine & Beer | 46,272 | 47,479 | 27,798 | 17,985 | 20,240 |
| Nursery Products & Cut Flowers | 64,175 | 67,024 | 85,476 | 50,418 | 51,432 |
| Pet Foods (Dog & Cat Food) | 26,812 | 33,240 | 25,614 | 15,040 | 13,826 |
| Other Consumer-Oriented Products | 120,630 | 110,909 | 115,945 | 64,916 | 88,034 |
| | | | | | |
| **Fish & Seafood Products, Edible Total** | 183,161 | 206,531 | 184,166 | 90,769 | 108,607 |
| Salmon, Whole Or Eviscerated | 11,158 | 10,916 | 11,199 | 2,421 | 4,302 |
| Salmon, Canned | 9,124 | 9,924 | 10,397 | 4,820 | 9,071 |
| Crab & Crabmeat | 341 | 1,469 | 920 | 662 | 2,051 |
| Surimi (Fish Paste) | 14,995 | 10,735 | 2,964 | 416 | 3,197 |
| Roe & Urchin (Fish Eggs) | 4,752 | 3,300 | 5,675 | 2,058 | 6,005 |
| Other Edible Fish & Seafood | 142,790 | 170,187 | 153,011 | 80,392 | 83,981 |

Source: www.fas.usda.gov (BICO reports)

**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 12 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%. It is worth noting that the 55-65 year old group has relatively high purchasing power. In general they have paid off the mortgage on their house and benefit from a good pension.

The recent financial crisis is having an impact on European consumers. Their confidence in the economy has gone down dramatically and people are worried about their savings, jobs and pensions. As a result they are adjusting their lifestyle. Sales of luxury food products and beverages are expected to go down.

Figure 4: Key Demographic Figures For The Benelux

| | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|
| Population, in millions | 26.7 | 26.8 | 27.4 | 27.6 |
| Number of Households, in millions | 11.5 | 11.7 | 11.9 | 12 |
| Household Size | 2.3 | 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 |
| 2008* | 24.0 | 26.0 | 35.3 | 11.0 | 3.8 | 16,404,282 |

Source: CBS, *estimate from CBS

Figure 6: Main Non-Dutch Population By Ethnicity

| | 2004 | 2005 | 2006 | 2007 | 2008* |
|---|---|---|---|---|---|
| Indonesian | 398,502 | 396,080 | 393,057 | 389,940 | 387,124 |
| Turkish | 351,648 | 358,846 | 364,333 | 368,600 | 372,852 |
| Surinamese | 325,281 | 329,430 | 331,890 | 333,504 | 335,679 |
| Moroccan | 306,219 | 315,821 | 323,239 | 329,493 | 335,208 |
| Netherlands Antilles & Aruba | 130,722 | 130,538 | 129,683 | 129,965 | 131,387 |

Source: CBS
*estimates

Figure 7: Main Non-Belgian Population By Ethnicity

| | 2003 | 2004 | 2005 | 2006 |
|---|---|---|---|---|
| Italian | 193,000 | 190,000 | 186,000 | 175,912 |
| French | 113,000 | 115,000 | 118,000 | 123,076 |
| Dutch | 92,000 | 94,000 | 97,000 | 113,320 |
| Moroccan | 106,000 | 101,000 | 94,000 | 81,339 |
| Turkish | 59,000 | 56,000 | 53,000 | 42,733 |

Source: www.dofi.fgov.be

Figure 8: Advantages And Challenges US Products Face In The Benelux

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

Source: USDA

Figure 9: Consumer Trends

| Consumers' needs and preferences: | |
|---|---|
| Health: | natural ingredients, lower calories, low or no sugar, healthy meals |
| Convenience: | fresh pre-packed food components, take-away, fresh ready-to-eat meals |
| Price: | discount, special offers, will accept higher prices as long as they can be justified |
| Food Safety: | more information, more guarantees |
| Stores: | There is a need for 2 types of stores: the more traditional store that offers a wide assortment of products, fresh, specialty and luxury products, personalized service, etc. while on the other hand there is a need for discounters, stores that focus on price. |

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 in 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 recent 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 only 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 of and concerned about the effect of food on health and well-being. One driver is that there has been a trend to a more healthful lifestyle in Western countries. Another is a reaction to events highlighting foodborne illnesses (like BSE and the Dioxin scare). Consumers are looking for and finding more information on this topic; the media, including the Internet, TV and magazines, respond to this desire and feed into it.

Food processors and retailers play a crucial role, as well, as they develop and market food products to create, anticipate and meet consumer needs.

## Section 2. Exporter Business Tips

### Local Business Customs

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

- Most business people speak English 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 about the product/service and their business partner 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 of retailers and to changing consumers' demands, food processors are increasingly looking for long-term partnerships rather than a one-off business transaction.

- In times of a weaker dollar, importers are especially looking for added value from the U.S. They are looking for healthy or unique products for their customers.

### 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: NL8017 and BE8006. http://www.fas.usda.gov/scriptsw/attacherep/default.asp

## Section 3. Market Sector Structure And Trends

### The Food Retail Market

In 2007, the turnover of the total food retail industry was almost USD 65 billion (1USD=0.731€). The consolidated full-service supermarket sector makes around 90% of total food retail sales. The remaining 10% includes food sales made at department stores, delicatessen stores and traditionally non-food stores.

Supermarkets:

The supermarket industry in the Benelux is highly consolidated. Quite often, supermarket organizations even work together in purchase organizations, which consolidate 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 | 30.0% | 30.0% |
| - Mestdagh | 2.7% | |
| Delhaize | 24.0% | 24.0% |
| Colruyt | 20.0% | 20.0% |
| - Spar | 3.0% | |
| - Alvo | 2.4% | |
| Aldi | 13.0% | 13.0% |
| Louis Delhaize | 3.5% | 3.5% |
| - Match Bel | 1.9% | |
| - Profi | 0.7% | |
| Intermarche | 2.0% | 2.0% |
| Lidl | 4.7% | 4.7% |
| Other | 2.8% | 2.8% |

Source: Store Check, FAS/TheHague calculations

Figure 11: Supermarket Chains In The Netherlands

| Company name | market share in retail market | market share on the purchase side |
|---|---|---|
| Albert Heijn | 29.5% | 29.5% |
| Laurus/Super de Boer | 7.3% | 7.3% |
| Schuitema/C1000 | 14.3% | 14.3% |
| Aldi | 8.9% | 8.9% |
| Lidl | 3.8% | 3.8% |
| S&S Winkels | 4.8% | 4.8% |
| -Edah | | |
| Superunie | 30.0% | 30.0% |
| - Dirk van den Broek | | |
| - Plus | | |
| - Jumbo | | |
| - Coop | | |
| - Spar | | |
| - Prisma | | |
| - Boni | | |
| - Vomar | | |
| - Deen | | |
| - Dekamarkt | | |
| - Hoogvliet | | |

Source: AC Nielsen/ FAS/TheHague calculations

Besides the traditional supermarket chains as discussed above, we see new firms entering the food retail market. Not only are traditionally non-food retailers like Ikea, HEMA and V&D increasingly selling food products, also upscale department stores and delicatessen stores have started 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 seasonal or event-related specialty products. Some smaller independent non-food stores are following 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, and Asian and Mediterranean cuisines.

Figure 12A: 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

Figure 12B: Leading Non-Food Retail Chains In The Benelux Selling Specialty Foods

| Company Name | Website |
|---|---|
| De Tuinen | www.detuinen.nl |
| Oil & Vinegar | www.oilvinegar.com |
| Xenos | www.xenos.nl |

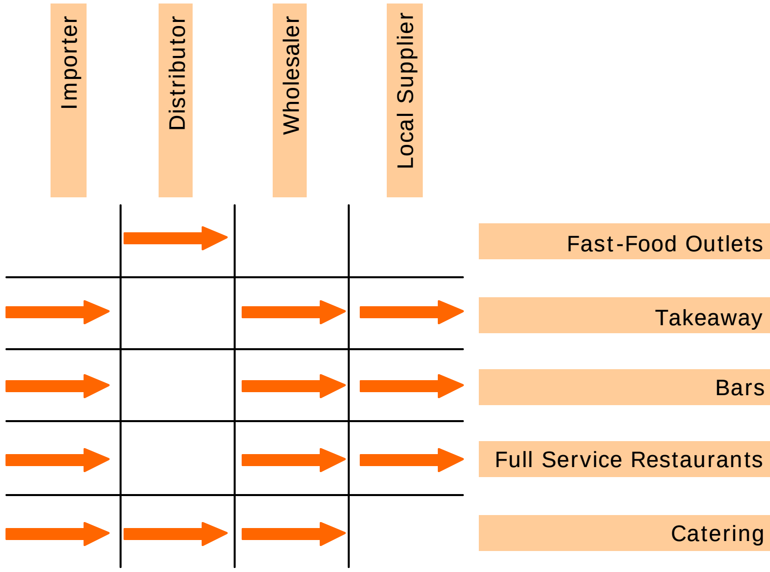
More information on this segment can be found in the following report, http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN NL 7021.

Delicatessen Stores:
Traditional butcher and fruit & vegetable shops, as well as small independent family-run supermarkets, are losing market share. These supermarkets are being either bought by big retailer chains or 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 2007 was over USD 27 billion.

Restaurants dominate the Benelux foodservice industry and make up roughly 50% of the industry. Restaurant owners are generally independent entrepreneurs, working with both local suppliers and wholesalers. An overview of leading Dutch wholesalers and distributors are detailed in Appendix 1. The second 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 regular beef and poultry are essentially barred from the market due to sanitary restrictions, while high tariffs and the restrictions on many biotech products keep many processed foods from the US off store shelves.

Competition in the Benelux HRI Foodservice market will remain tough as new firms enter the market. Traditionally food (Makro) and non-food (V&D, HEMA, Ikea) retailers 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 in http://www.fas.usda.gov/scriptsw/attacherep/default.asp GAIN NL 7021.

**The Food Processing Market**

The food processing industry is an important sector in the Benelux economy as it represents about 10% of total GDP. The industry has an estimated turnover of $ 114 billion for 2007[1] and an average annual growth rate of 2.5%. Within the food processing industry, the production of meat and dairy products forms the largest segment, followed by cigarettes, bakery, confectionary, flour and sugar industry.

Figure 14: An Overview Of The Benelux Food Processing Market, 2007 figures

| | |
|---|---|
| Turnover food processing industry | $ 114 billion |
| Number of processing companies | 5,400 |
| U.S. exports to the Benelux: | |
| - Bulk Agricultural Products | $ 710 million |
| - Intermediate Agricultural Products | $ 458 million |
| - Consumer-Oriented Agricultural Products | $ 949 million |
| - Fish and Seafood Products | $ 185 million |

Source: FAS/The Hague

[1] Estimates by FAS/The Hague based on figures of the FNLI and Centrale Raad voor het Bedrijfsleven

The majority of the processing companies are located close to the main port cities of Rotterdam, Antwerp and Amsterdam. Knowledgeable traders, an excellent distribution system and an innovative economy make the Benelux an attractive market for processing and trading agricultural products.

Although the Benelux itself has a population of only 27.6 million people, the food processing industry has access to roughly 75 million affluent consumers within 200 miles of the Benelux border, or 15% of the total EU population. This densely populated region covers important markets like North Rhine Westphalia, London and Paris. Germany, France and the UK continue to be important markets for the Benelux food processing industry.

As in other Western European countries, GDP and population only grow slowly in the Benelux countries. Greater growth opportunities are to be found in South, Central and Eastern Europe. Processors therefore benefit from the expansion of the EU. Opportunities are also to be found outside the EU, in growing markets in South America and Asia.

The on-going consolidation in the food processing industry, driven by the growing buying power of retailers, affects the price and negotiations between processors and food ingredient suppliers. In addition, more than ever before, the food processing industry is consolidating across the border. Not only did Benelux companies invest heavily in North and South America in recent years, international companies are also investing in the Benelux.

In order to be successful in the Benelux food market and the larger EU market, U.S. exporters of food ingredients will have to comply with EU and national regulations.

## Section 4. Best High-value Products Prospects

Figure 15: The Best High-Value Products Prospects

| Commodity | Total Benelux Imports 2007, (US$ 1,000) | Benelux Imports from US 2007, (US$ 1,000) | Key Constraints Over Market Development | Market Attractiveness for USA |
|---|---|---|---|---|
| Fish Fillets HS: 030429 | 788,702 | 32,472 | competition from Iceland and China | growing opportunities in the further processing industry |
| Cod HS: 030352 | 38,657 | 1,949 | fierce competition from Russia and Norway | growing demand due to lower stocks in European waters and growing consumption |
| Scallops HS: 030721 | 14,634 | 8,818 | price - lack of knowledge by customer | growing demand in the high end HRI industry |
| Salmon prepared or preserved HS: 160411 | 29,014 | 10,991 | some competition from Canada | great image and growing demand |

| | | | | |
|---|---|---|---|---|
| Milk and cream in solid form HS: 040210 | 534,000 | 9,407 | competition from Germany, France and Poland | the Benelux has a big export-focused food processing industry |
| Food preparations HS: 210690 | 785,665 | 116,887 | competition from Germany and Switzerland | the Benelux has a abig export-focused food processing industry |
| Almonds HS: 080212 | 175,595 | 104,438 | US represents 63% of total imports, some competition comes from Spain | growing demand from the food ingredients market |
| Pistachios HS: 080250 | 152,017 | 108,620 | competition from Iran | growing demand from the snack food and confectionary industry |
| Fruit and other edible parts of plants HS: 200899 | 210,686 | 13,710 | competition from Costa Rica, India and Ecuador | |
| Wine HS: 2204 | 2,538,888 | 38,458 | 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
FAS/The Hague
Marcel Pinckaers
Lange Voorhout 102, 2514 EJ The Hague, The Netherlands
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. Below you will find a selection of the reports from FAS/The Hague.

| Report Number | Report Title | Date Released |
|---|---|---|
| NL5005 | HRI Foodservice Industry | 03/2005 |
| 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 |
| NL7021 | Dutch Specialty Foods | 09/2007 |
| NL7028/BE7006 | Food Retail | 11/2007 |
| NL8009 | EU Seafood Marketing Report | 04/2008 |
| NL8012 | Food Processing Industry | 06/2008 |
| NL8017/BE8006 | FAIRS | 09/2008 |
| NL8022 | Export Certification Guide | 10/2008 |

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 |
| Hortifair, Amsterdam, The Netherlands<br>Worldwide Horticultural Trade Fair | October 14 – 17, 2008<br>Annual | tel: +31 (0)297-344033<br>fax: +31 (0)297-326850<br>www.hortifair.nl<br>info@hortifair.nl |
| SIAL, Paris, France<br>One of Europe's food & beverages largest trade show<br>*USDA Endorsed Show*<br>Trade Show Office<br>Contact: Sharon Cook<br>tel: +1-202-7203425<br>Sharon.Cook@usda.gov | October 19 -23, 2008<br><br><br><br>Bi-Annual Show | tel: +33-(0)1-49685498<br>fax: +33-(0)1-49685632<br>www.sial.fr |
| Horeca Expo, Gent, Belgium<br>Hotel, Restaurant and Catering Show | November 23 – 27, 2008 | tel: +32-(0)9-2419211<br>fax: +32-(0)9-2419475<br>email: horeca@flandersexpo.be<br>www.horecaexpo.be |
| HORECAVA, Amsterdam,<br>The Netherlands<br>Hotel and Restaurant Show | January 12 – 15, 2009 | tel: + 31-(0)20-5753032<br>fax: + 31-(0)20-5753093<br>www.horecava.nl |
| European Fine Food Fair<br>Maastricht, The Netherlands<br>Exclusive Hotel and Restaurant Show | January 06 – 08, 2009 | MECC Maastricht<br>tel: +31-(0)43-3838383<br>fax: +31-(0)43-383830<br>www.efff.nl |
| National Food Week<br>Utrecht, The Netherlands<br>International food and beverage trade show | March, 2009<br>Bi-Annual | tel: +31-(0)30-2952799<br>fax: +31-(0)30-2952814<br>www.nationalefoodweek.nl |
| European Seafood Exhibition, Brussels, Belgium<br>One of the world's largest seafood trade show<br>*USDA Endorsed Show*<br>Trade Show Office<br>Contact: Sharon Cook<br>tel: +1-202-7203425<br>Sharon.Cook@usda.gov | April 28 – 30, 2009 | tel: +1-207-8425504<br>fax: +1-207-8425505<br>www.euroseafood.com |
| World of Private Label (PLMA)<br>Amsterdam, The Netherlands<br>Private Label Trade Show | May 26 – 29, 2009 | tel: +31-(0)20-5753032<br>fax: +31-(0)20-5753093<br>www.plmainternational.com |

| Food Shows Frequently Visited by Benelux Food Buyers | | |
|---|---|---|
| Show | When | Show Organizers |
| Fresh Rotterdam, Rotterdam,<br>The Netherlands<br>Fruit & Vegetable Trade show | September, 2009<br>Bi-Annual | tel: +31-(0)10-2933300<br>fax: +31-(0)10-2933399<br>www.freshrotterdam.nl |
| ANUGA, Cologne, Germany.<br>One of Europe's food & beverages largest trade show<br>*USDA Endorsed Show*<br>Trade Show Office<br>Contact: Sharon Cook<br>tel: +1-202-7203425<br>Sharon.Cook@usda.gov | October 10 – 14, 2009<br>Bi-Annual | tel: +49-180-5204220<br>fax: +49-221-821991010<br>www.anuga.com |

## Appendix 3. An Overview Of The Leading Benelux Importers Of Specialty Foods Supplying Both Foodservice And Food Retail

(in alphabetic order)

American Food Service
Mr. G. Chin-A-Kwie
Gageldijk 1
3602 AG Maarssen, the Netherlands
P: 31-(0)30-2613604
F: 31-(0)30-2613624
E: gchin@americanfood.nl
W: www.americanfood.nl

Bickery Food Group
Mr. R.G. Bikkers
P.O. Box 433
1200 AK, Hilversum, the Netherlands
P: 31-(0)35-6560244
F: 31-(0)35-6563824
E: r.g.bikkers@bickery.nl
W: www.bickery.nl

Engel Foreign Food
Mr. W. Engel
Ondernemingsweg 264
1422 DZ, Uithoorn, the Netherlands
P: 31-(0)297-533833
F: 31-(0)297-531665
E: w.engel@xs4all.nl
W: www.engelforeignfood.com

GranFood
Mr. M. Jol
P.O. Box 19045
Saturnusstraat 43
2500 CA, The Hague, the Netherlands
P: 31-(0)70-3815007
F: 31-(0)70-3850259
E: maarten.jol@granfood.nl
W: www.grandfood.nl

Maer Foods
Mr. H. Rijpma
P.O. Box 79
7590 AB, Denekamp, the Netherlands
P: 31-(0)541-358010
F: 31-(0)541-358011
E: hillebrand.rijpma@maerfoods.eu
W: www.maerfoods.eu

Pietercil Barends
Mr. D. van Bueren
Bleiswijkseweg 51
2280 AB, Zoetemeer, the Netherlands
P: 31-(0)79-3441100
F: 31-(0)79-3424549
E: danny.van.Bueren@pietercil.com
W: www.pietercil.com

Pietercil Delby's
Mr. D. van Steenberghe
Vitseroelstraat 74
B-1740 Ternat, Belgium
tel.: +32 583 81 00
fax: +32 582 29 63
E: dirk.van.steenberghe@pietercil.com
W: www.pietercil.com

Two Food
Mrs. L. van Eijden-Vellekoop
Vosseveldlaan 23
3768 GK, Soest, the Netherlands
P: 31-(0)35-6090990
F: 31-(0)35-6090988
E: info@twofood.nl
W: www.twofood.nl

Wessanen
Mr. R. Miedema
P.O. Box 2554
Beneluxlaan 9
3500 GN, Utrecht, the Netherlands
P: 31-(0)30-2988738
F: 31-(0)30-2988703
E: Richard.Miedema@wessanen.com
W: www.boas.nl

## 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 (%) | $48,429 / 3.5% |
| Consumer Oriented Food Imports From All Countries ($Mil) / U.S. Market Share (%) | $25,168 / 2.6% |
| Fish and Seafood Imports From All Countries ($Mil) / U.S. Market Share (%) | $2,622 / 2.7% |
| 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) | $ 73,762 |
| Unemployment Rate (%) | 4.0 |

Source: World Trade Atlas

### Belgium

| | |
|---|---|
| Agricultural, Fish and Forestry Imports From All Countries ($Mil) / U.S. Market Share (%) | $36,483 / 1.9% |
| Consumer Oriented Food Imports From All Countries ($Mil) / U.S. Market Share (%) | $20,008 / 1.4% |
| Fish and Seafood Imports From All Countries ($Mil) / U.S. Market Share (%) | $2,093 / 1.6% |
| 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) | $ 43,476 |
| Unemployment Rate (%) | 6.9 |

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 | 0.73 |
| 2008* | 1 | 0.66 |

* 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.A. | | | U.S. Market Share | | |
|---|---|---|---|---|---|---|---|---|---|
| | **2005** | **2006** | **2007** | **2005** | **2006** | **2007** | **2005** | **2006** | **2007** |
| | US $ Million | | | US $ Million | | | % | | |
| **CONSUMER-ORIENTED AGRICULTURAL TOTAL** | 18,385 | 20,585 | 25,168 | 546 | 596 | 656 | 2.97 | 2.89 | 2.61 |
| Snack Foods (Excl. Nuts) | 973 | 1,100 | 1,414 | 8 | 5 | 9.5 | 0.83 | 0.47 | 0.67 |
| Breakfast Cereals & Pancake Mix | 73 | 85 | 101 | 0 | 0 | 0.2 | 0.45 | 0.35 | 0.20 |
| Red Meats, Fresh/Chilled/Frozen | 1,489 | 1,880 | 2,440 | 5 | 6 | 16.4 | 0.36 | 0.34 | 0.67 |
| Red Meats, Prepared/Preserved | 704 | 765 | 884 | 1 | 0 | 0.7 | 0.08 | 0.06 | 0.08 |
| Poultry Meat | 556 | 528 | 732 | 0 | 0 | 0 | 0.00 | 0.00 | 0.00 |
| Dairy Products (Excl. Cheese) | 2,134 | 2,230 | 2,848 | 1 | 15 | 26.5 | 0.05 | 0.67 | 0.93 |
| Cheese | 578 | 611 | 731 | 0 | 0 | 6.3 | 0.06 | 0.05 | 0.86 |
| Eggs & Products | 130 | 135 | 170 | 5 | 5 | 7.4 | 3.75 | 3.43 | 4.35 |
| Fresh Fruit | 2,627 | 3,025 | 3,565 | 35 | 26 | 27.7 | 1.32 | 0.86 | 0.78 |
| Fresh Vegetables | 1,235 | 1,427 | 1,707 | 3 | 5 | 3.3 | 0.21 | 0.35 | 0.19 |
| Processed Fruit & Vegetables | 1,307 | 1,441 | 1,954 | 34 | 37 | 40.1 | 2.62 | 2.53 | 2.05 |
| Fruit & Vegetable Juices | 934 | 1,129 | 1,131 | 60 | 71 | 63.4 | 6.44 | 6.30 | 5.61 |
| Tree Nuts | 477 | 557 | 603 | 128 | 171 | 165.2 | 26.87 | 30.72 | 27.40 |
| Wine & Beer | 1,126 | 1,132 | 1,433 | 70 | 40 | 35.5 | 6.21 | 3.55 | 2.48 |
| Nursery Products & Cut Flowers | 1,240 | 1,366 | 1,624 | 58 | 58 | 64.7 | 4.71 | 4.26 | 3.98 |
| Pet Foods (Dog & Cat Food) | 203 | 202 | 249 | 6 | 7 | 9.4 | 3.05 | 3.67 | 3.78 |
| Other Consumer-Oriented Products | 2,598 | 2,973 | 3,580 | 131 | 148 | 179.3 | 5.04 | 4.98 | 5.01 |
| **FISH & SEAFOOD PRODUCTS** | 2,041 | 2,256 | 2,622 | 86 | 78 | 71.2 | 4.20 | 3.47 | 2.72 |
| Salmon | 52 | 75 | 85 | 11 | 12 | 13.8 | 21.60 | 16.04 | 16.24 |
| Surimi | 35 | 45 | 63 | 7 | 2 | 1.3 | 19.33 | 5.07 | 2.06 |
| Crustaceans | 377 | 417 | 470 | 2 | 5 | 0.7 | 0.43 | 1.18 | 0.15 |
| Groundfish & Flatfish | 933 | 1,053 | 1,247 | 47 | 38 | 32.0 | 5.06 | 3.65 | 2.57 |
| Molluscs | 92 | 117 | 109 | 14 | 14 | 15.9 | 15.12 | 11.58 | 14.59 |
| Other Fishery Products | 551 | 548 | 648 | 5 | 7 | 7.6 | 0.91 | 1.26 | 1.17 |
| **AGRICULTURAL PRODUCTS TOTAL** | 30,378 | 32,967 | 42,001 | 1,231 | 1,381 | 1,587 | 4.05 | 4.19 | 3.78 |
| **AGRICULTURAL, FISH & FORESTRY TOTAL** | 34,900 | 38,281 | 48,429 | 1,346 | 1,494 | 1,694 | 3.86 | 3.90 | 3.50 |

Source: World Trade Atlas

| Belgium Imports | Imports from the World | | | Imports from the U.S.A. | | | U.S. Market Share | | |
|---|---|---|---|---|---|---|---|---|---|
| | **2005** | **2006** | **2007** | **2005** | **2006** | **2007** | **2005** | **2006** | **2007** |
| | US $ Million | | | US $ Million | | | % | | |
| **CONSUMER-ORIENTED AGRICULTURAL TOTAL** | 15,492 | 16,496 | 20,008 | 182 | 214 | 271.40 | 1.18 | 1.29 | 1.36 |
| Snack Foods (Excl. Nuts) | 946 | 967 | 1,141 | 1 | 2 | 1.82 | 0.14 | 0.17 | 0.16 |
| Breakfast Cereals & Pancake Mix | 105 | 128 | 141 | 0 | 0 | 0.22 | 0.38 | 0.21 | 0.16 |
| Red Meats, Fresh/Chilled/Frozen | 841 | 893 | 980 | 10 | 9 | 8.46 | 1.14 | 1.01 | 0.86 |
| Red Meats, Prepared/Preserved | 566 | 594 | 720 | 0 | 0 | 0.06 | 0.00 | 0.01 | 0.01 |
| Poultry Meat | 337 | 301 | 372 | 0 | 0 | 0.00 | 0.00 | 0.00 | 0.00 |
| Dairy Products (Excl. Cheese) | 1,676 | 1,672 | 2,257 | 3 | 3 | 7.82 | 0.18 | 0.15 | 0.35 |
| Cheese | 1,043 | 1,077 | 1,245 | 0 | 0 | 0.00 | 0.00 | 0.00 | 0.00 |
| Eggs & Products | 85 | 100 | 127 | 1 | 0 | 0.41 | 0.83 | 0.23 | 0.33 |
| Fresh Fruit | 2,628 | 2,800 | 3,148 | 19 | 28 | 34.75 | 0.73 | 1.00 | 1.10 |
| Fresh Vegetables | 773 | 892 | 1,137 | 0 | 0 | 0.14 | 0.03 | 0.01 | 0.01 |
| Processed Fruit & Vegetables | 1,148 | 1,240 | 1,524 | 14 | 16 | 19.86 | 1.25 | 1.26 | 1.30 |
| Fruit & Vegetable Juices | 572 | 733 | 979 | 6 | 12 | 15.42 | 1.11 | 1.61 | 1.58 |
| Tree Nuts | 296 | 261 | 315 | 59 | 63 | 85.34 | 19.91 | 23.93 | 27.09 |
| Wine & Beer | 1,184 | 1,240 | 1,642 | 3 | 5 | 3.63 | 0.24 | 0.40 | 0.22 |
| Nursery Products & Cut Flowers | 458 | 474 | 560 | 13 | 24 | 35.44 | 2.88 | 5.02 | 6.32 |
| Pet Foods (Dog & Cat Food) | 349 | 385 | 447 | 18 | 24 | 20.44 | 5.10 | 6.24 | 4.57 |
| Other Consumer-Oriented Products | 2,487 | 2,739 | 3,292 | 34 | 29 | 37.53 | 1.38 | 1.06 | 1.14 |
| **FISH & SEAFOOD PRODUCTS** | 1,631 | 1,886 | 2,093 | 31 | 40 | 32.82 | 1.91 | 2.13 | 1.57 |
| Salmon | 98 | 118 | 120 | 4 | 7 | 4.09 | 3.61 | 5.67 | 3.42 |
| Surimi | 8 | 9 | 10 | 0 | 0 | 0.00 | 0.00 | 0.59 | 0.00 |
| Crustaceans | 584 | 702 | 809 | 2 | 2 | 2.60 | 0.30 | 0.34 | 0.32 |
| Groundfish & Flatfish | 491 | 547 | 573 | 5 | 5 | 5.31 | 0.92 | 0.86 | 0.93 |
| Molluscs | 182 | 211 | 224 | 17 | 20 | 15.46 | 9.07 | 9.67 | 6.91 |
| Other Fishery Products | 267 | 300 | 356 | 5 | 6 | 5.36 | 1.78 | 2.01 | 1.50 |
| **AGRICULTURAL PRODUCTS TOTAL** | 23,695 | 25,149 | 30,945 | 488 | 482 | 625.79 | 2.06 | 1.91 | 2.02 |
| **AGRICULTURAL, FISH & FORESTRY TOTAL** | 27,711 | 29,721 | 36,483 | 556 | 560 | 699.17 | 2.01 | 1.88 | 1.92 |

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 | 2005 | 2006 | 2007 |
|---|---|---|---|
| Germany | 3,956,932 | 4,352,899 | 5,411,300 |
| Belgium | 2,859,563 | 3,040,564 | 3,619,036 |
| France | 1,251,517 | 1,475,816 | 1,975,657 |
| Brazil | 1,171,720 | 1,331,409 | 1,640,251 |
| Spain | 1,140,836 | 1,202,776 | 1,402,330 |
| United Kingdom | 548,204 | 623,721 | 790,573 |
| South Africa | 618,799 | 605,016 | 794,552 |
| U.S.A. | 545,854 | 595,885 | 655,566 |
| Italy | 488,462 | 506,659 | 650,352 |
| Chile | 426,686 | 464,252 | 556,803 |
| Poland | 347,876 | 459,754 | 618,930 |
| Ireland | 403,561 | 416,044 | 411,888 |
| China | 299,510 | 413,744 | 549,833 |
| New Zealand | 288,230 | 350,918 | 350,692 |
| Costa Rica | 193,605 | 331,550 | 320,895 |
| Other | 3,843,303 | 4,414,257 | 5,419,002 |
| World | 18,384,658 | 20,585,264 | 25,167,660 |

Source: World Trade Atlas

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

| $1,000 | 2005 | 2006 | 2007 |
|---|---|---|---|
| Iceland | 343,928 | 394,939 | 435,645 |
| Germany | 292,419 | 277,522 | 327,687 |
| Belgium | 124,951 | 149,860 | 191,530 |
| Denmark | 140,150 | 135,840 | 155,836 |
| United Kingdom | 117,740 | 134,046 | 143,474 |
| China | 129,867 | 131,269 | 152,384 |
| Vietnam | 45,191 | 103,890 | 135,447 |
| U.S.A. | 85,831 | 78,183 | 71,199 |
| Norway | 33,582 | 53,772 | 115,300 |
| Morocco | 53,809 | 51,272 | 75,188 |
| France | 48,096 | 49,850 | 48,847 |
| Russia | 30,417 | 46,460 | 77,922 |
| Tanzania | 38,974 | 44,481 | 49,262 |
| Bangladesh | 15,471 | 42,699 | 30,113 |
| Thailand | 33,130 | 41,961 | 37,274 |
| Other | 507,801 | 520,299 | 574,443 |
| World | 2,041,357 | 2,256,343 | 2,621,551 |

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

| $1,000 | 2005 | 2006 | 2007 |
|---|---|---|---|
| France | 3,822,446 | 4,133,697 | 5,021,317, |
| Netherlands | 3,459,829 | 3,629,290 | 4,486,297 |
| Germany | 1,974,305 | 2,083,771 | 2,566,755 |
| Spain | 654,059 | 696,691 | 832,044 |
| Italy | 671,221 | 656,548 | 757,698 |
| Brazil | 390,085 | 496,246 | 692,887 |
| United Kingdom | 435,295 | 458,127 | 537,488 |
| Colombia | 442,700 | 452,956 | 364,137 |
| New Zealand | 448,659 | 438,642 | 421,555 |
| Costa Rica | 364,117 | 350,922 | 562,729 |
| Ecuador | 224,244 | 267,429 | 373,280 |
| Ireland | 134,043 | 227,883 | 273,782 |
| U.S.A. | 182,199 | 213,533 | 271,341 |
| Argentina | 176,566 | 156,607 | 159,310 |
| South Africa | 138,912 | 140,919 | 100,844 |
| Others | 1,973,082 | 2,092,594 | 2,587,014 |
| World | 15,491,762 | 16,495,855 | 20,008,477 |

Source: World Trade Atlas

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

| $1,000 | 2005 | 2006 | 2007 |
|---|---|---|---|
| Netherlands | 414,513 | 434,145 | 498,375 |
| France | 163,125 | 190,683 | 200,729 |
| Denmark | 97,169 | 106,937 | 101,602 |
| Germany | 83,204 | 102,882 | 119,058 |
| Bangladesh | 76,285 | 96,609 | 119,964 |
| India | 70,267 | 96,420 | 109,203 |
| Iceland | 86,504 | 87,673 | 96,008 |
| Vietnam | 59,982 | 83,119 | 82,950 |
| U.K. | 63,734 | 79,144 | 80,225 |
| Indonesia | 43,467 | 65,350 | 65,645 |
| China | 49,386 | 62,626 | 89,902 |
| Uganda | 63,275 | 52,618 | 54,561 |
| Canada | 46,168 | 52,113 | 49,215 |
| U.S.A. | 31,073 | 40,254 | 32,819 |
| Chile | 18,754 | 27,048 | 29,724 |
| Other | 263,600 | 308,638 | 279,819 |
| World | 1,630,506 | 1,886,259 | 2,092,749 |