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The Netherlands

Retail Food Sector

Report

2000

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Report Highlights:
Dutch eating habits are changing with consumers demanding more convenience, more fresh foods, a greater variety and more specialty food items.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
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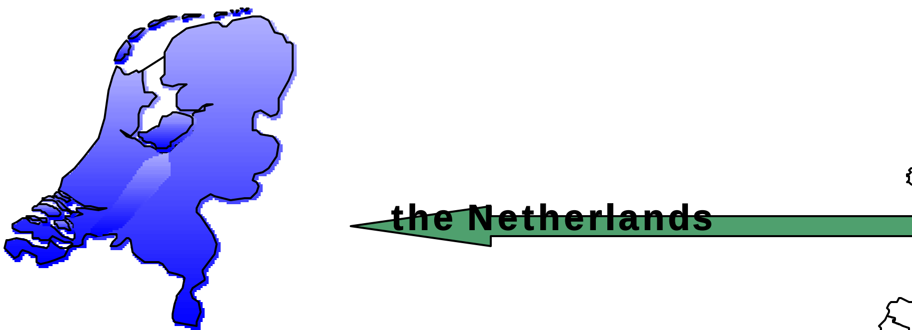
Section I. Market Summary

Demographic Characteristics

The Netherlands is one of the most densely populated countries in the world, with a population of 15.8 million consumers. The Netherlands has 971 inhabitants per square mile (468 people per square kilometer) as compared to 860 in Japan and 75 in the United States. In size, the Netherlands is about ¾ that of Maryland which has 502 inhabitants per square mile. More than half of the population lives in the triangle Rotterdam-Amsterdam-Utrecht. Five percent of the Dutch population, is non-Dutch with Turkish and Moroccan inhabitants comprising the largest, single, ethnic groups. The number of Americans in the Netherlands is over 20,000.



The most important demographic trends in the Netherlands are:

- Population is growing steadily (16.6 million expected in 2010)
- Average household size is declining (37 percent one person households in 2010)
- Percentage of people with higher education levels (university/technical college) is growing (from 11 percent in 1991 to 15 percent in 1998)
- More elderly people (15 percent of the population will be older than 65 in 2010)

Economic Development

The Dutch economy is in its sixth year of expansion, combining strong GNP growth, with sharply falling unemployment and modest inflation. The economy expanded by 3.6 percent in 1999. Economic growth in 1999 was driven predominantly by investment and consumer spending, buoyed by sizable income gains resulting from a boom in land, real estate and stock market prices. With job growth outpacing the expansion of the labor force, unemployment in 1999 fell to less than 3 percent, a level last seen in the early 1970s. Consumer price inflation remained modest as the effects of higher crude oil prices and depreciation of the EURO lifted the CPI in 1999 slightly more than 2 percent.

Economic Development					
	1997	1998	1999	2000	2001
Gross domestic production (%)	3.80	3.70	3.60	4.00	3.50
Unemployment (%)	6.20	4.90	4.00	3.25	2.75
Consumer price inflation (%)	2.20	2.00	2.20	2.25	3.25
Average buying power (%)	0.30	1.40	-0.40	1.00	5.25
Total private consumption (%)	2.60	4.10	4.20	3.75	4.25
Private consumption of food and beverages (%)	2.00	0.20	0.00	0.50	0.50

Source: Centraal Planbureau, 2000

Due to predictions of strong world trade growth, the official forecast is for the Dutch economy to expand by 4 percent in 2000, followed by 3.5 percent GNP growth in 2001. A tight labor market is expected to result in a fall in unemployment to 2 percent. Consumer price inflation, on the other hand, is expected to rise to 2.25 percent in 2000, and 3.25 percent in 2001. Average buying power will grow 1 percent in 2000. Adoption of a new tax system in the Netherlands in 2001 will likely result in a 5.25 percent increase of average buying power. In 2000, total private consumption is expected to grow by 3.74 percent. The strong increase in private consumption especially deals with the purchase of consumer durables, like cars and domestic appliances. Of total private consumption, 15 percent (US$ 24.5 billion) was spent on food and beverages in 1998. In 1999, total sales in food and beverages stuck at the 1999 level. However, a growth of 0.5 percent is foreseen for 2000 and 2001. In 1999 Dutch households spent US$ 68.8 on food per week, of which US$ 54.5 was spent in supermarkets. Large supermarkets have 65 percent of the market, specialty stores have a market share of more than 20 percent, and open air markets, department stores, gas station stores, etc., make up the balance.

Dutch Food Purchasing Attributes

As a result of changing demographics and increased wealth, Dutch eating habits are changing with consumers demanding convenience, fresh foods, more variety, and more specialty food items. Health and convenience foods are increasingly valued by the customer. In addition to low prices, the Dutch consumer wants quality, a wide variety, and service.

The Dutch Consumer in 2000	
The consumer in the Drivers seat:	maturity, internet, large amount of choices, mega-experience
Multi-channel:	increasing distribution channels food, 24-hours economy, catering
Food-trends:	health, functional food, grazing, multi-moment consumption, convenience, time efficiency, knowledge of heritage/ingredients, nutritional awareness, increase of fresh cooled products
Brands as churches of the future:	pillars of trust, confidence, responsibility of the society, experiences

Source: NFO Trendbox, 2000

According to the Dutch Central Bureau for Provision Trade (CBS) the following consumer trends are visible:

- Most consumers (53 percent) visit the supermarket by car, 29 percent use the bicycle and 18 percent of the consumers go by foot. On average, traveling time to the supermarket is about nine minutes.

- Good quality is the most important reason for the consumer in choosing a supermarket, followed by a pleasant store atmosphere. Low prices are rated in the sixth place. As a result of the strong competition between supermarkets, sometimes with special offers for owners of client cards, the consumer is becoming more sensitive for special offers and slightly more price sensitively. Almost 80 percent of all consumers have a client card of at least one supermarket.

- For all fresh food products, the supermarket has the highest market share. The number of consumers that buy their fresh food products prepackaged or in self-service is rapidly increasing. The trend toward prepacked fresh food products is irreversible. In this trend the demand for convenience plays an important role. Young households with children buy more often prepacked fresh food than other households.

- Except for detergents and potato chips, the preference by the consumer for branded products has increased or remained stable. The highest increase in preference for branded products incurred in pet food, and coffee. Consumers appreciate private label products most because they offer good quality for attractive prices. Therefore, price conscious consumers, such as families, favor private label products.

- In an increasing number of households less time, or no time at all, is spent in preparing meals. In more than one out of ten households, warm meals are often or always consumed out of the home. The percentage of consumers that eat ready-to-eat meals has increased from 19 percent in 1995 to 25 percent in 1999. Main reasons to choose ready-to-eat meals are lack of time to cook. Particularly on weekends less meals are cooked at home. Almost 75 percent of Dutch households own a microwave oven, compared to 49 percent in 1995.

- Customers are increasing demands for a wider product range and better service. In particular younger consumers like to be surprised with new products in the supermarket. Almost 70 percent of all households like finding new products in the supermarket and 45 percent indicate that cooking demonstrations and tasting new products make shopping more fun. Sales of medicines in a supermarket drugstore-department are most appreciated among the customers.

- For the modern consumer, product quality exceeds being tasteful and healthy. Sustain ability, environmental and animal care play an increasingly important role. Functional foods and organic produced products are new in the shelves. Consumer interest in functional food and organic products is growing, although many believe that organic products are expensive. On average, organic products are regarded as healthier. The supermarket will become the most important outlet for these products in the near future.

- The demand for Halal food (Muslim food) and Kosher food (Jewish food) is increasing. Non- Jewish consumers, like Muslims, behaved vegetarians, and intolerant consumers to lactose or milk, represent today 40 to 50 percent of the consumers of Kosher food. The same can be said about Halal food. In the perception of non-Muslim or non-Jewish consumers, Halal and Kosher food are very pure. In addition, because of its traceability consumers have the feeling that the food is very safe to consume.

- In the Netherlands, genetically modified organisms (GMO's) in food are generally less of an issue with the consumer then with the food producer, importer/wholesaler and retailer. Consumer organizations usually have a balanced opinion, whereas pressure groups are against the use of GMO's in food. Producers and retailers are sometimes targeted by anti GMO pressure groups and therefore fear consumer scare and consequent loss of market share. If more than 1 percent of GMO's are used in food, the law and the Dutch retailers want it clearly specified on the label.

Trends in the Dutch Food Market	
Health	natural ingredients - low calories - no sugar - fresh - organic
Convenience	frozen foods - fresh, prepacked - take-away - easy to prepare
Price	special offers - shop-around
Winners	fish - meals - petfood
Distribution	more power to the supermarket - fewer specialty stores - more shopping at the gas and railway station
Stores	more personal service - wider assortment - more fresh and non-food - convenience foods - more exotic products - environmental friendly products

Opportunities for U.S. Products

U.S. food product must be highly competitive or differentiated to sell in the Dutch food market. At the moment, the main trade barriers for U.S. food products are high freight costs, due to high oil prices, and in particular the high US dollar. However, some continue to be successful (see Annex: 1.).

Advantages	Challenges
Sophisticated market, good buying power	Markets are saturated, competition is fierce
Well organized trading system, many speak English	Transportation costs, import duties
Favorable image of American products	Label & ingredient requirements
Strong interest with buyers in unique and innovative products	Difficult to attract the attention of the large buying groups

Section II. Road Map for Market Entry

Entry Strategy

- Start testing the Dutch market by sending your **product- and price information** to importers. Include labels and provide harmonized tariff numbers. Ask importers for their frank opinion on the marketability of your product and, ask if they want to receive samples. Make it easy for them to reply, use a preprinted fax form which they can fill out and fax-return to you. **Request a list of importers** and available market information from **OAA/The Hague**. Suggestion: send copy of your mailing to importers to AgAffairs Office The Hague, enclose your mailing list. Contact info * see Section V.

- Consider the range of trade shows and demonstrate your product in the most relevant show. Either the SIAL in Paris, October 20 - 24, 2002 (even years) or the ANUGA in Cologne, October 13-18, 2001 (odd years). These food shows are the largest of their kind and visited by Dutch and other European food buyers. See Annex 2.

- Participate in the U.S. Food Export Showcase (USFES) at the Food Marketing Institute (FMI) Convention in Chicago, May 6 - 8, 2001. The USFES is visited by Dutch and other international buyers. See Annex 2.

- Once you have established contact with an interested Dutch party, visit the person and his company and together formulate a plan of action. Be patient, show perseverance and involvement. In the Dutch food retail market, listing fees do not exist. However, a Dutch company usually expects your financial involvement in a promotional plan. Contact your State Department of Agriculture and/or your State International Marketing Office and Trade Association. Seek their assistance and find out if you can participate in the Market Access Program (MAP).

- Dutch supermarket organizations rarely import foreign foods directly. They often refer foreign exporters to Dutch specialty food importers. See Annex 3.

- A U.S. food company interested in selling its food products to the Netherlands maximizes its selling opportunities by using a Dutch importer/wholesaler. This importer already has an entree with a number of supermarket buyers and is able to easily introduce the U.S. product. Besides, the importer is already supplying products to the particular wholesale- or retail operation, which make the logistics much easier.

- Logistics are a very important issue. Dutch retail stores are usually in the inner cities and difficult to reach by truck. They are daily supplied and often even twice a day. Retailers want small stocks, which means frequent and fast delivery to the distribution centers by food producers/wholesalers.

- The importer/wholesaler already has a good contact with supermarket buyers and will “test market” your product with these buyers. Their negative or positive reply weighs heavily in the importers’ decision to import your product.

- The Netherlands has a highly developed and competitive food market. There is fierce price competition between supermarket operators in order to maintain or enlarge their market share. The Netherlands itself has a large food production industry and nearby EU countries as Germany, Belgium, France and the U.K. are supplying sophisticated foods and beverages to the Dutch market. These foreign suppliers operate with relatively low transportation costs and their products are not subject to import duties.

- A product will be of great interest to the buyer if it is innovative and will produce a profit. Innovation, can be either the product itself, the packaging and/or the pricing. Most popular products are those which have:
  - Innovation and therefore added value
  - A higher than average trade margin
  - A professional and substantial support plan

Success Factors for U.S. Products in the Dutch Market	
Brand	***Private Label***
' price/quality	' distribution
' emotion	' power of trade
' advertising	' shelf space
' added value promotions	' price/quality
' product-innovations	

Source: ACNielsen, 2000

Market Structure
The Netherlands has a high number of supermarkets with relatively small floor space. There are only a few “hypermarkets” or superstores. Therefore, the average size of a Dutch supermarket is small compared to those in the U.S. “Large” Dutch supermarkets have 65 percent of the market, specialty stores have a market share of more than 20 percent, and open air markets, department stores, gas station stores, etc., make up the balance. Specialty stores, like butchers, greengrocers, fishmongers, etc., are continuously losing market shares to supermarkets because of their lack of economies of scale. The longer opening hours also create problems for the specialty store, which is often operated by family members. Since 1996, most Dutch supermarkets have been open in the evening till 08:00 P.M. In addition, an increasing number of supermarkets are open till 10:00 P.M.

Changes in Numbers of Stores per Format in the Netherlands				
Store formats	**1981**	**1991**	**1998**	**2010**
Mobile/driving stores	4,860	3,510	1,131	250
Neighborhood stores < 150 m2	4,684	2,065	1,209	120
Service supermarkets < 900 m2	1,871	1,222	1,020	550
Service supermarkets < 2,000 m2	820	1,303	1,427	1,550
Soft discounters	976	746	643	230
Hard discounters	**143**	**440**	**638**	**920**
Superstores < 6,000 m2	28	51	30	55
Hypermarkets > 6,000 m2	17	9	7	5
Quality discounting	-	-	**2**	**40**
Non retail*	3	1	2	4
Multi-cultural immigrant shops	**25**	**45**	**325**	**650**
Superconvenience shops**	**210**	**510**	**1,120**	**1,600**

Source: Cap Gemini Ernst & Young, 2000
* including homeshopping-systems
** including evening shops, petrol shops, railway-shops, camping-shops and excluding delicatessen shops

Relatively new food retailers in the Dutch market are gas stations, food stores at railway stations/airports and small convenience food stores in the inner cities. To an increasing extent, large supermarket organizations are suppliers to, or owners of these outlets. In addition, the wine, liquor, and drug chain-stores are practically all owned by the large supermarket organizations and growing in importance at the expense of privately owned stores in this market sector. The position of Dutch supermarket organizations is still becoming stronger, although the classic supermarket will probably disappear because of:

- a 10 percent annual increase of out-of-home consumption
- an increasing number of restaurants which sell ready-made meals
- upcoming Dining & Meal-shops (something in between restaurant, catering and supermarket)
- tighter cooperation between the food industry and wholesalers/retailers
- use of e-commerce (by the food industry, the wholesalers and the retailers)

Shares in Turnover by Product Segments		
	1999	**2000**

Grocery	18.8	18.6
Confectionery	18.8	18.9
Drinks	16.4	15.0
Dairy Chilled	28.4	27.6
Frozen	21.5	20.7
Cigarettes	5.0	4.6
Personal Care	15.6	15.1
Household	16.8	16.4

Source: AC Nielsen, 2000

In 1999, the preference by the Dutch consumer for branded products has increased or remained stable. Private label sales in the Netherlands decreased by 5 percent to an 18.4 percent market share in value. Private labels account for one in five products sold. Yet while neighboring markets have witnessed a dramatic expansion of private labels over the last few years, the sales in the Netherlands have been decreasing for the second year. According to Erasmus Food Management Institute (EFMI), the market share of private labels in the Netherlands is more favorable than mentioned above. In fact, not all of the fresh products are taken into account, while Dutch supermarkets have invested heavily in private labels for fresh food. EFMI gives three reasons for the fact that it is more interesting to conduct private labels in fresh than in groceries:

- Lower competition by A-brands
- High gross margins
- More possibilities to establish a supermarket "cachet" to attract consumers

Private Label Market Share by Country (%)

	Volume			Value		
	1998	1999	Diff.	1998	1999	Diff.
United Kingdom	45.2	45.4	0.2	43.6	43.5	-0.1
Belgium	34.8	34.7	-0.1	25.9	26.0	0.1
Germany	31.6	33.2	1.6	26.1	27.4	1.3
France	21.0	22.1	1.1	18.1	19.1	1.0
The Netherlands	21.1	20.6	-0.5	18.9	18.4	-0.5

Source: AC Nielsen, 2000

The private label market in the Netherlands shows significant signs of growth in the future, with consumers asking supermarkets to provide a wider variety of private label products, to introduce higher quality goods into the market and offer more value for the money. At the moment, the perishable departments led private label performance in the Netherlands. Delicatessens had the highest value share, nearly 30 percent, while dairy posted the greatest volume share, almost 33 percent. According to GfK Information Resources, approximately 61 percent of daily fresh milk and buttermilk sold in Dutch supermarkets are private-label. A further increase of this share is expected. Meals, eggs and biscuits also have private label shares of more than 50 percent. However, these value shares are decreasing. Albert

Heijn is the overall market leader in private labels in the Netherlands.

Gainers in Private Label Market Share in the Netherlands in 1999 (%)			
Volume		Value	
Product	**Share**	**Product**	**Share**
Sweeteners	9.1	Sweeteners	6.4
Fruit drinks	6.6	Vegetables, herbs	3.1
Snack bases	4.1	Chilled ready meals	2.5
Milk/Buttermilk	2.8	Oils	2.5
Chilled ready meals	2.6	Pasta	2.3
Peanuts, nuts etc.	2.5	Peanuts, nuts etc.	2.1
Dutch packaged cheese	2.5		

Source: PMLA, 2000

Company Profiles

Because consumers prefer one-stop shopping, supermarkets expand their services and assortments with products such as crockery, textile, books and services such as photo development and shoe repair. In 1999, the turnover of these articles and services was already US$ 671.1 million. A rapid increase in the near future is expected. In 1999, the total turnover of supermarkets was US$ 19.9 billion. This is an increase of 5.6 percent, compared to US$ 18.8 billion in 1998. The Dutch supermarket sector is dominated by Albert Heijn with a market share of 28 percent. The next most important retailers are Laurus N.V. (24% market share), TSN (21%) and Superunie, a wholesale buyer for private supermarkets (18%). Supermarket chains could be divided by:

- National coverage: Albert Heijn and the members of the Laurus Group (like Edah and Super de Boer)
- Regional coverage: members of Superunie
- Independence: supermarkets who buy through Trade Service Nederland (like C1000)
- Others

Market Shares of the Top Four Supermarket Chains in the Netherlands		
	1980	**1999**
Albert Heijn	13.2	27.9
C1000	5.2	10.7
Super de Boer	5.0	9.1
Edah	6.2	6.9
Total	**29.6**	**54.6**

Source: AC Nielsen, 2000

Six major "buying groups" control 98.8 percent of the market. These buying groups sell to supermarket chains directly, or indirectly by selling to their wholesalers. Members of these buying groups retain some decision making authority. It is expected that in 10 years the majority of Dutch food will be bought by centralized buying offices of large retailers or by buying offices of cooperating smaller retailers throughout Europe. As an example, Albert Heijn belongs to the Swiss-based AMS (Associated Marketing Services AG). This buying association buys for 12 different European supermarket companies, with a total of 14,000 stores in 12 countries. In 1996 AMS, bought over US$ 96 billion of food products which were sold in the 14,000 stores under private label "Euroshopper." AMS is just one of the 12 European buying associations for supermarkets, although it is one of the largest.

The Six Largest Food Buying Organizations in the Netherlands in 2000

Retailer/Wholesaler - type of outlet	Sales/ Market share	Number of Outlets	Purchasing
Albert Heijn, Retailer, National Multiple	US$ 5.5 billion 27.8 percent	1,790 nation wide	Direct, Imp./ wholesaler
Laurus Group, Buying organization for supermarket chains Super De Boer, Edah, Konmar, Spar, Groenwoudt Supermarkten and Basismarkt	US$ 4.7 billion 23.8 percent	1,908 nation wide	Direct, Imp./ wholesaler
Trade Service Nederland, (TSN) Buying organization for wholesalers Schuitema, Sperwer, A&P, Prisma Food Groep, Boon Sliedrecht and Codis	US$ 4.2 billion 21.0 percent	1,730 nation wide and regional	Direct, Imp./ wholesaler
Superunie, Buying organization for 14, usually family owned, regional supermarket chains	US$ 3.5 billion 17.8 percent	1,240 regional	Direct, Imp./ wholesaler
Aldi, Retailer	US$ 1.3 billion 6.3 percent	359 nation wide	Direct, Imp./ wholesaler
Koopconsult, Buying organization for the regional wholesaler Samenwerkende Dirk van den Broek Bedrijven	US$ 0.4 billion 2.1 percent	173 regional	Direct, Imp./ wholesaler
IN TOTAL	**US$ 19.6 billion 98.8 percent**	**7,200**	**Direct, Imp./ wholesaler**

Source: Elsevier Bedrijfsinformatie, 2000

Buying Procedures

- Dutch supermarket organizations very seldom import directly. They are not interested in buying directly due to the lower volume, niche type, foreign products. They often refer foreign exporters to Dutch importers (see Annex 3.). Usually the purchasing department of a retail/wholesale grocery operation is split up into several units headed by a Unit Manager and each unit has several Category- or Product Managers. In contrast to the former "food buyer", category - or product managers have full profit responsibility. Therefore, generally, the manager will only purchase products which will bring a profit to the company in order not to endanger his bonus. The purchasing departments of the main supermarket organizations in the Netherlands are organized as follows:

- **Albert Heijn**'s buying department consists of seven separate units, headed by a Unit manager who supervises various Category managers (± 40 in total). Category managers are responsible for one or more products and they handle buying, sales, logistics and all merchandising activities. Category managers have profit-responsibility for their own products.

- **Laurus** buys for member retailers, Super De Boer, Edah, Konmar and the Basismarkt all having nation wide representation. The Central Buying Department of Laurus negotiates and receives offers from food sellers. The Laurus buyers, about 25 in total, present the offers to the buyers of the various member chains.

- **Superunie** has about 25 buyers who buy on behalf of its 14 members. These are mostly family owned, regional supermarket chains. After the central buying department of Superunie accepts the offer of the supplier, the product is offered to all members of Superunie during regularly held buying meetings. Superunie has about 25 buyers.

- **Trade Service Nederland (TSN)** buys among others for the wholesale organizations Schuitema and Sperwer. TSN is a fully owned subsidiary of Schuitema and AHOLD (holding company of Albert Heijn) owns 73 percent of the Schuitema shares. TSN has about 30 Assortment managers/buyers, each responsible for their own products and its profits.

• Contact the category manager or importer/wholesaler by writing him a short personal letter, and follow up by a telephone call to make an appointment.

• Before visiting the category manager or importer/wholesaler, make sure you are informed about the company. In case of a retailer, visit a few of their stores in advance.

Evaluating Importers

Select an importer who has an excellent network of contacts in the retail trade, preferably with nationwide distribution. A Dutch importer with nationwide distribution gives a U.S. exporter access to the Dutch supermarket buyer along with valuable expertise. In return, a Dutch importer typically expects loyalty and promotional support. An importer often insists on an exclusive contract for the Netherlands. As a rule of thumb, the importer/wholesaler expects a margin of 23 to 24 percent of the CIF price, including costs. The retailer's margin is generally a minimum of 30 percent. These margins are representative of the specialty foods typically imported from the United States.

For a partial listing of Dutch Specialty food Importers/Wholesalers see Annex: 3.

General profile of the Dutch Businessman/woman

These are some generalities often heard about Dutch businessmen or women:

< Practically all speak English.
< They usually have no time for business lunches or dinners.
< The Dutch don’t beat around the bush and don’t skirt the issues. After very brief introductions, they expect you to come straight to the point. They give you their frank opinion and let you know if you offer them something they don’t want.
< Dutch food buyers, the category managers and/or product managers, are fully responsible for the buying process and profits the product will bring. They are only interested to speak to decision makers.
< The Dutch businessman is looking for a relationship, almost a partnership. Once you start doing business with him, he expects continued support from you.
< The Dutch usually know their business and know what your competition is doing. The Dutch businessman understands that you need to make a profit. He is a tough but a fair negotiator.

Section III. Competition

The EU produces, a large variety of foods at competitive prices. This is partly due to the fact that an increasing number of European firms pay with the Euro currency instead of US dollars. Therefore, they do not suffer from the high US dollar rate. At January 1, 2002, the Dutch guilder will be, like the other currencies of EU-member states, replaced by the Euro. In addition, EU food producers and exporters have the advantage of relative low transportation cost and fast delivery times. Their product is not charged with import duties nor do they face major ingredient or labeling requirements.

Section IV. Best Products Prospects

The U.S. has a significant share of the Dutch import market for the following products in 1998:

<	Texmex foods	80 percent
<	Grapefruit	50 percent
<	Canned salmon	25 percent
<	Tree nuts	22 percent
<	Wine	4 percent

A. Popular U.S. Food Products in the Dutch Market

- Texmex foods
- Snack foods
- Fruit and vegetables juices
- Processed fruit and vegetables
- Fresh fruit
- Tree nuts
- Wine
- Pet food
- Canned salmon

B. U.S. Food Products not present in significant quantities, but which have good sales potential, include:

- A variety of grocery items, from peanut butter to Pringle chips, from sport drinks to cheese balls, etc.
- Red apples
- Fresh fruit juices
- American cheeses
- Organic foods, like organic apples and pears
- Halal foods
- Kosher foods
- Functional foods
- Native foods
- Natural food supplements

C. U.S. Food Products not present because they face significant barriers

- Canned fruits (high tariffs)
- Frozen whole turkeys and parts (high tariffs)
- Fresh pork (high tariffs)
- Poultry meat (phytosanitary)
- Fresh beef (phytosanitary)

Section V. Post Contact and Further Information

- Office of Agricultural Affairs (O.A.A.) American Embassy
  Postal Address: U.S. Embassy-AGR, Unit 6707, Box 038, APO AE 09715
  Phone: 31-70-3109299, *Fax:* 31-70-3657681, *e-mail:* agthehague@fas.usda.gov,
  Http://www.usemb.nl
  Visitor Address: Lange Voorhout 102, 2514 EJ The Hague, the Netherlands

- The Netherlands follows EU policies in regard to labeling and ingredient requirements. The Dutch Commodities Act (Warenwet) supplies general guidelines and requirements for foods. The basic objectives of this law are health protection, product safety and labeling. A more detailed report which specifically addresses labeling and ingredient requirements in the Dutch market entitled, **the Netherlands: Food and Agricultural Import Regulations & Standards (FAIRS)** report can be obtained from the FAS homepage: http://www.fas.usda.gov etc.

Annex 1.

U.S. Exports of Consumer-Oriented Products to the Netherlands (US$ 1,000)				
	1996	**1997**	**1998**	**1999**
Consumer-Oriented Products	346,881	351,907	404,676	466,897
Snack Foods (ex nuts)	6,924	6,068	7,595	**8,374**
Breakfast Cereal & Pancake mix	572	547	375	220
Red Meats, Fresh/Chilled/Frozen	14,581	15,492	16,284	12,031
Red Meats, Prepared/Preserved	717	926	1,775	818
Poultry Meat	17,542	9,039	1,616	**3,869**
Dairy Products	9,941	8,083	11,821	5,938
Eggs & Products	8,902	5,857	5,318	1,442
Fresh Fruit	31,429	26,681	24,649	23,684
Fresh Vegetables	1,843	3,867	2,999	2,681
Processed Fruit & Vegetables	43,170	40,823	59,314	**60,522**
Fruit & Vegetables Juices	32,267	50,816	47,451	**58,718**
Tree nuts	96,495	77,111	80,990	67,340
Wine & Beer	10,598	17,097	47,712	**78,905**
Nursery Products & Cut Flowers	37,951	42,851	42,574	42,574
Pet Food (dog & cat)	13,156	17,610	12,397	**16,546**
Other Consumer-Oriented Products	21,115	28,956	42,305	83,234

Source: BICO

Annex 2.

Food Shows Frequently Visited by Dutch Food Buyers		
Show	**When**	**Show Organizers**
HORECAVA, Amsterdam, the Netherlands (Hotel, Restaurant Show)	January 8-11, 2001	tel: + (31) 20 575 30 32 fax: + (31) 20 575 30 93 http://www.rai.nl
ROKA, Utrecht, the Netherlands	March 10 - 13, 2002	tel: + (31) 30 295 59 11 fax: + (31) 30 294 03 79 http://www.jaarbeursutrecht.nl
FMI, Chicago, United States < **Participation in** U.S. Food Export Showcase tel: + (1) 202 296 9680 fax: + (1) 202 296 9686	May 6 - 8, 2001	tel: + (1) 202 452 8444 fax + (1) 202 429 4559 http://www.fmi.org
World of Private Label (PLMA) Amsterdam, the Netherlands < **U.S. Participation** USDA/FAS, Washington Trade Show Office tel: + (1)202 720 3623 fax + (1)202 690 4374	May 22 - 23, 2001	tel: + (31) 20 575 30 32 fax: + (31) 20 575 30 93 http://www.plma.com
SIAL, Paris, France < **U.S. Participation:** USDA/FAS, Paris, France tel: + (33) 1 431 222 77 fax + (33) 1 431 226 62	October 20 - 24, 2002	tel: + (33) 149 68 54 99 fax: + (33) 147 31 37 75 http://www.frenchfoodfinder.com/sial.htm
ANUGA, Cologne, Germany < **U.S. Participation:** USDA/FAS/ATO Hamburg, Germany tel: + (49) 40 414 6070 fax: + (49) 40 414 60720	October 13 - 18, 2001	tel: + (49) 221 82 10 fax: + (49) 821 34 10 http://www.koelmesse.de/anuga/english/index.html

Or contact the International Marketing Section of your State Department of Agriculture.

Annex 3.
Partial Listing of Dutch Specialty Food Importers/Wholesalers

AMERICAN FOOD SERVICE
Gageldijk 1
3602 AG Maarssen
Ph. 030-2613604
fax. 030-2613624 Contact: Mr. G. Chin A. Kwie

BOAS b.v.
Stephensonstraat 40
2723 RN Zoetermeer
Ph. 079-3442600
fax. 079-3421722 Contact: Mr. Th. van Ham

CORNY BAKERS b.v.
Gouwzeestraat 6
1382 KD Weesp
Ph. 0294-417897
Fax. 0294-411826 Contact: Mr. R. Kamerbeek

FELIX COHEN b.v.
Koopvaardijweg 3 P.O. Box 410
4906 CV Oosterhout 4900 AK Oosterhout
Ph. 0162-684120
fax. 0162-686536 Contact: Mr. F. Bertens

GranFood b.v.
Saturnusstraat 43 P.O. Box 19045
2516 AE Den Haag 2500 CA Den Haag
Ph. 070-3815007
fax. 070-3850259 Contact: Mr. Onno Brokke

DE KWEKER
Centrale Groothandelsmarkt S1
1051 KL Amsterdam
Ph. 020-6828866
fax. 020-6827366 Contact: Mr. P.F. Poelstra

LUSTO b.v.
Vareseweg 121
3047 AT Rotterdam
Ph. 010-4621233
fax. 010-4621270 Contact: Mr. W. Storm

PIETERCIL BARENDS b.v.
Bleiswijkseweg 51
2712 PB Zoetermeer
Ph. 079-3441100
fax. 079-3420831 Contact: Mr. J. Hoop/ Mrs.. R. Andreoli

SUNCOMEX b.v.
Vanadiumweg 15
3812 PX Amersfoort
Ph. 033-4659075
fax 033-4651449 Contact: Mr. B.E. Boerema

Note: Country Code for the Netherlands is (31)

Annex 4.

The Netherlands : Buying Association / Supermarket				
Organization	**Chain/Supermarket**	**No. of Outlets**	**Retail surface in sq. m.***	**Location**
Super Unie 18% approx. mkt. share HQ : Industrieweg 22 b P.O. Box 80 4153 ZH Beesd. Tel : 31-345-686 666 Fax : 31-345-686 600				
Dekamarkt B.V. **HQ : Velsen Noord/Beverwijk** Tel: 31-251-276 666 Fax: 31-251-276 600	Dekamarkt	62	825 m2	North & South Holland and Flevoland
	Wine & Liquer Store	24	71 m2	
	Drug Store Bubbles	4	200 m2	
	Dekamarkt Gas Station	1		
Deen Supermarket B.V. **HQ : Hoorn** Tel: 31-299-252 100 Fax: 31-299-252 102	Deen	26	829 m2	North Holland
EM-TÉ Trommelen Beheer **HQ :Kaatsheuvel** Tel: 31-416-542 500 Fax: 31-416-542 519	Em-Té	11	1,000 m2	North Brabant
	Wine & Liquer Store	11	70 m2	
Jan Linders **HQ : Nieuw Bergen (L)** Tel: 31-485-349 911 Fax: 31-485-342 284	Jan Linders	43	650 m2	South East-Gelderland, East Brabant & Limburg
Gekoma **HQ : Apeldoorn** Tel: 31-55-599 8499 Fax: 31-55-599 8490	Komart Supermarket	16	850 m2	Apeldoorn and surrounding area
	Wine & Liquer Store	6	86 m2	
Kluft Distrifood **HQ : Beverwijk** Tel: 31-251-275 700 Fax: 31-251-226 969	Komart Supermarket	25	900 m2	Utrecht & North Holland
	Wine & Liquer Store	15	41 m2	
Hoogvliet B.V. **HQ : Alphen a/d Rijn** Tel: 31-172-418 218 Fax: 31-172-421 074	Hoogvliet	31	1,000 m2	Utrecht, South-Holland & Gelderland
	Wine & Liquer Store	18	35 m2	

Nettorama Distributie B.V. **HQ : Oosterhout** **Tel: 31-162-455 950** **Fax: 31-162-456 520**	**Nettorama Users Markets**	**20**	**1,105 m2**	**Overijssel, Utrecht, South-Holland, North-Brabant Drenthe & Limburg**
Poiesz Supermarkten B.V. **HQ : Sneek** **Tel: 31-515-428 800** **Fax: 31-515-428 801**	**Poiesz Supermarket**	**32**	**675 m2**	**Friesland, Groningen, Flevoland & Drenthe**
	Wine & Liquer Store	**30**	**30 m2**	
Sanders Supermarkt B.V. **HQ : Enschede** **Tel: 31-53-484 8500** **Fax: 31-53-484 8501**	**Sanders**	**18**	**610 m2**	**Enschede and surrounding area**
Vomar Voordeelmarkt B.V. **HQ : IJmuiden** **Tel: 31-255-563 700** **Fax: 31-255-521 649**	**Vomar (Voordeelmarket)**	**33**	**1,150 m2**	**North-Holland**
	Wine & Liquer Store	**31**		
Co-op ‘82 U.A. **HQ : Arnhem** **Tel: 31-26-384 3900** **Fax: 31-26-384 3999**	**Co-op**	**53**	**667 m2**	**Gelderland, Overijssel, Utrecht & Zaanstreek**
Van Eerd Food Groep B.V. **HQ : Veghel** **Tel: 31-413-380 200** **Fax: 31-413-343 634**	**Jumbo** **(incl. 17 franchisers)**	**50**	**750 m2**	**North-Brabant, Limburg, Gelderland & Zeeland**
	Pryma **(franchise)**	**20**	**300-400 m2**	**South-Holland, North-Brabant, Zeeland & Limburg**
	Others	**19**		
Sligro **HQ : Veghel** **Tel: 31-413-343 500** **Fax: 31-413-341 520**	**Thuismarkt**	**115**	**100-350 m2**	**Nation Wide**
	SRV **(incl. Springer & Partner/Milk etc.)**	**150**		**Nation Wide**
	Eigen Formule/eigen naam	**250**	**100-350 m2**	**Nation Wide**
	Milo	**71**		**Nation Wide**
	Drop Inn	**40**	**20-50 m2**	**Nation Wide**
	Snoep Express (candy)	**15**	**100-150 m2**	**Nation Wide**

Laurus N.V. 24% approx. mkt. share HQ : Paralelweg 64 P.O. Box 175 5201 AD Den Bosch Tel: 31-73-622 3622 Fax: 31-73-622 3636				
Konmar **HQ: The Hague** Tel: 31-70-321 5121 Fax: 31-70-329 1174	Konmar	30	3,000 m2	Nation Wide
Super de Boer **HQ: Amersfoort** Tel: 31-33-454 7777 Fax: 31-33-454 7454	Super de Boer franchise	159 253	825 m2	Nation Wide
Edah **HQ: Amersfoort** Tel: 31-492-571 911 Fax: 31-492-571 388	Edah franchise	235 84	900 m2	Nation Wide
Spar Convenience **HQ: Amersfoort** Tel: 31-33-454 4111 Fax: 31-33-454 4189	Spar	260	<500 m2	Nation Wide
	Independent Supermarkets	300	<150 m2	Nation Wide
	Mobile Shops	400	<150 m2	Nation Wide
Basismarkt **HQ: Zaltbommel** Tel: 31-418-574 444 Fax: 31-418-514 580	Basismarkt	187	400-700 m2	Nation Wide
Groenwoudt Groep HQ : Renswoude Tel: 31-318-579 254 Fax: 31-318-579 242	Groenwoudt Supermarkets	61	1,050 m2	Overijssel, Gelderland, Flevoland, Utrecht, North Brabant, & South-Holland
	Nieuwe Weme Supermarket	36	1,105 m2	Groningen, Friesland Drenthe, Overijssel & Flevoland
	Lekker & Laag	2	1,500 m2	Tilburg & Boxtel
Aldi 7% approx. mkt. share				
Aldi Netherlands B.V. HQ : Erasmusweg 3 4101 AK Culemborg Tel: 31-345-472 911 Fax: 31-345-419 383	**Aldi** Districts; Best Culemborg	**359** 83 49	**500 m2**	**Nation Wide**

	Drachten	52		
	Ommen	71		
	Roosendaal	50		
	Zaandam	54		
Albert Heijn 28% approx. mkt. share				
Albert Heijn B.V. **HQ :** Provinvialeweg 11 1506 MA Zaandam Tel: 31-75-659 9111 Fax: 31-75-631 3030 **Mother Co.** **Koninlijke Ahold N.V.**	Albert Heijn	488	1,127 m2	Nation Wide
	Franchises	175	874 m2	Nation Wide
	Primarkt	24	1,350 m2	South-Holland, North-Brabant & Limburg
	Wine & Liquer Store	17	60 m2	
	Den Toom (incl. Wine & Liquer Store)	1	2,300 m2	Rotterdam
	Albert Heijn Home Delivery Service	1		Heemstede
	Ter Huurne	2		Buurse & Venlo
	Etos (Drug store)	460	170 m2	Nation Wide
	Gall & Gall (Wine & Liquer)	488	84 m2	Nation Wide
	Jamin (candy)	134	97 m2	Nation Wide
Purchase combination Wholesaler - Van Tol/ZHM				
Van Tol **HQ :** Europaweg 2 P.O. Box 64 2410 AB Bodegraven Tel: 31-172-619 311 Fax: 31-172-613 796	Troefmarkt	73	140 m2	West, East & South Holland
	Emha mobile shops neighbourhood shops recreational shops	 239 91 41	<100 m2	West, East Central & South Holland
	Vers Garant	5	80 m2	
Zuivel Handels-maatschappij (ZHM) HQ : Oosterwolde Tel: 31-516-568 600 Fax: 31-516-520 691	SRV mobile shops	310	25 m2	Nation Wide
	Springer & Partners	80	25 m2	Nation Wide
	Melk & Meer	50	10 m2	Nation Wide
	PRO Markt	40	150 m2	Nation Wide
	Others	115		
Lidl				
Lidl Netherlands **HQ :** Huizermaatweg 45 1273 NA Huizen Tel: 31-35-524 2411 Fax: 31-35-526 4139	Lidl	65	700 m2	Nation Wide

Koopconsult 5% approx. mkt. share see Dirk van den Broek Bedrijven				
Cooperating Dirk van den Broek Bedrijven B.V. **HQ :** Flemmingweg 1 P.O. Box 631 2400 AP Alphen a/d Rijn Tel: 31-172-448 200 Fax: 31-172-474 636	Dirkson/Dirk van den Broek	35	1,000 m2	Amsterdam and surrounding area
	Bas ven der Heijden	27	900 m2	Rotterdam and surrounding area
	Digros	13	925 m2	Leiden and surrounding area
	Jan Bruijns	10	925 m2	Zeeland & North-Brabant
	Dino	3	500 m2	The Hague & Katwijk
	Slijterijen Dirk III (Wine & Liquer)	51		
	Drogisterijen Drix (Drug store)	34		
T.S.N. 15% approx. mkt. share Trade Service Netherlands B.V. Plotterweg 4 P.O. Box 325 3800 AH Amersfoort Tel : 31-33-453 3600 Fax: : 31-33-455 0172				
SchuitemaN.V. **HQ : Amerfoort** Tel: 31-33-453 3600 Fax: 31-33-455 1087 Mother Co. Ahold holds 73%	C1000	377	725 m2	Nation Wide
	Kopak	47	276 m2	Nation Wide
	Others	29		
A & P Holding b.v. **HQ: Baarn** Tel: 31-35-548 3311 Fax: 31-35-541 1751	A & P	125	750 m2	Nation Wide
	A & P Hypermarkten	6	7,700 m2	Arnhem, Ede, Muiden, Venlo, Leeuwarden & Alkmaar
BV Sperwer **HQ : De Bilt** Tel: 31-30-221 9211 Fax: 31-30-220 2074 Mother Co. B.V. Sperwer Holding	Plusmarkt	123	750 m2	Nation Wide
	Garantmarkt	100	285 m2	Nation Wide
	4=6 Service	15	124 m2	Nation Wide
	Gastrovino	43	140 m2	Nation Wide
	Holiday Resorts Shops	11		Nation Wide
	Others	42	150 m2	Nation Wide

Prisma Food Group **HQ : Nijkerk** **Tel: 31-33-245 5455** **Fax: 31-33-245 5401**	Golff	63	680 m2	Nation Wide
	Attent	65	197 m2	Nation Wide
	Boni Markten	33	750 m2	Central, East, & North Holland
	Meermarkt	86	360 m2	Nation Wide
	Zomermarkt/Rekra	85	207 m2	Nation Wide
	Own Brand & Formula Shops	104		Nation Wide
Boon Sliedrecht **HQ : Sliedrecht** **Tel: 31-184-418 500** **Fax: 31-184-412 159**	M.C.D.	30	500-1,200 m2	Utrecht, South-Holland & North Brabant
	Own Brand & Formula Shops Wine & Liquer Store	53 4	250-1,000 m2	Nation Wide
Codis C.V. **HQ : The Hague** **Tel: 31-70-359 0390** **Fax: 31-70-366 9098**	E-markt	102	260 m2	Nation Wide
	Stipt	17	105 m2	Nation Wide
	Thuiswinkel (Mobile Shop)	12	29 m2	Nation Wide
	Volumemarkt	44	440 m2	Nation Wide
	Others	160		