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Market Brief - Product

The Netherlands : Sauces & Liquid Condiments in the Benelux

The Hague [NL1], NL

BACKGROUND TO THE REGION

EUROPEAN UNION

Since its foundation, the EU has grown from its original six members to 15 member states. These are: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Luxembourg, Italy, Portugal, Spain, Sweden, the Netherlands and the United Kingdom.

A major objective of the European Union is to create a single market. Harmonization of legislation is an important component of the single market. The legislation is made up of regulations and directives. Regulations must be adopted by each Member State while directives must be transposed into each member state's own national legislation. The harmonization of food legislation is not yet completed and this means that exporters into Europe always have to check their product formulation and labeling for compliance with national legislation in the member state they are considering exporting to. Also, when exporting to Europe you will have to realize that despite the cooperation within the European Union, the member countries remain very different, e.g. languages, ways of doing business, culture, taste, etc.

BENELUX

Belgium (capital: Brussels), the Netherlands (capital: Amsterdam) and Luxembourg (capital: Luxembourg city) are three independent European countries, situated in the northwestern part of Europe. All three countries are member states of the European Union and they have a superficial cooperation in the so- called Benelux. This Benelux may be seen as a predecessor of the European Community that was founded in 1957. The name Benelux is nowadays also often used as a geographic indication. The cooperation between Belgium and Luxembourg is somewhat deeper because these two countries have a monetary union. All three countries are monarchies with a parliamentary democracy. Belgium is a federation consisting of three parts: Flanders (Dutch speaking), Wallonia (French speaking) and the Brussels region.

Until the introduction of the Euro, the new currency for the European Union which is expected to be in place in 2002, the Benelux countries will use their own currencies: the Dutch Guilder, the Belgian Franc and the Luxembourg Franc. In this market brief the values as of January 15th , 1998 are used: 1 Hfl = 0.487 US $ and 1 Bfr / 1 LFr = 0.0263 US $.

The countries have a legal system of their own which is partly harmonized within the regulations of the European Union.

Europeans speak many different languages. The people in the Netherlands speak Dutch. Many Dutch also speak one or more other languages, e.g. English, German or French. Belgium has formally three official languages: In the North and West of the country (this part is called Flanders) Flemish is the mother tongue, a Dutch dialect. In the south and east people speak French. In the east there is a small part of the country where German is the official language. The Luxembourg population speaks a dialect which is a mixture of the two official languages in this small country: French and German.

The Benelux is no homogeneous block, especially as regards cooking traditions, buying patterns etc.

Success in the Netherlands is no guarantee for success in Belgium/Luxembourg, and vice versa.

BELGIUM AND LUXEMBOURG

Demographic Characteristics

The total population of Belgium is 10.2 mln persons. There are 331 Belgians per km2. Of the 4.2 mln households, 1.1 mln are single persons. This number is expected to grow due to population aging, children leaving the home earlier and increasing divorce levels. Average household size is 2.5 persons. The largest cities are Brussels (1 mln inhabitants), Antwerp (500,000) and Gent, Charleroi, Liege (all approximately 200,000). Brussels is also the capital of the European Union.
Luxembourg is a mini-state (Duchy) with about 500,000 inhabitants, most of whom live in and around Luxembourg City.

Economic Developments

The Belgian economy grew 1.6% in 1996. However, disposable income actually decreased by 0.6%. Unemployment is a major problem, with 12% of the work force out of a job. Inflation is increasing slightly, now at around 2.1%.

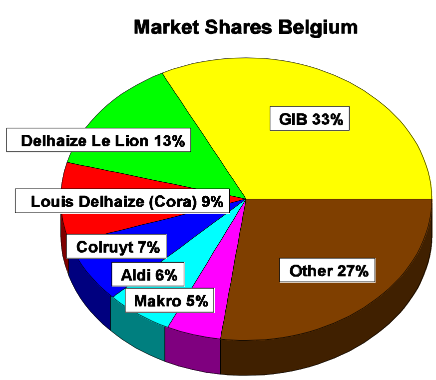
The percentage of disposable income spent on food has continued to fall, from 23.7% in 1975 down to 16.3% in 1995. However, total foods expenditure grew by 29% between 1988 and 1995.

Belgian Retail Structure

Smaller retailers have declined drastically. (From 16,668 stores in 1980 down to 10,325 stores in 1996.)

Winners have been the large supermarket chains dominated by GIB (511 stores), Delhaize 'Le Lion' (243 stores), Louis Delhaize (833 stores) and Colruyt (132 stores).
The continued growth of discount stores, such as Aldi, has also been remarkable, with the growth of their share between 1980 and 1996 measured at 77% (source: Distributie Vandaag).

In **Luxembourg**, the most important retailers are Match (13 stores, 40% share) and Cactus (16 stores, 40% share). French retailer Auchan is developing a presence in Luxembourg.



French retailers, such as the very aggressive Intermarché, are expected to increase their presence strongly throughout Belgium and Luxembourg

THE NETHERLANDS

Demographic Characteristics

The total population of the Netherlands is 15.5 mln persons. It is a country with a very high population density, 455 inhabitants per km2. The western part of the Netherlands with the cities of Amsterdam, Rotterdam, The Hague and Utrecht can be seen as one urban region.

The most important demographic trends in the Netherlands are:

- The population will grow steadily towards 17.6 mln in 2035
- Average household size is becoming smaller (43% 1 or 2 persons households)
- More elderly people (13% older than 65)
- Percentage of people with high level education (university/technical college) is growing (20% in 1980, 30% in 1996).

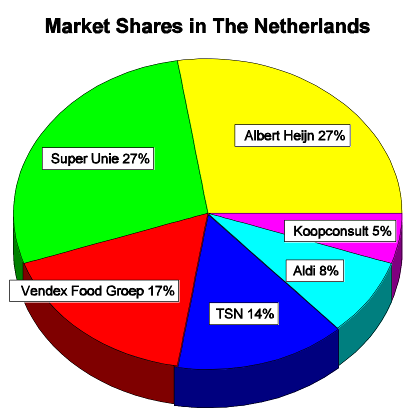
Economic Development

The Dutch economy is flourishing. The growth of national income has been 2.5 to 3% per year since 1994. Average buying power has been growing since 1991 at slightly less than 1% per year. Inflation has been at a level of approximately 2.5% since 1993. Private consumption grew in 1995 and 1996 by about 2%. Unemployment is decreasing so fast that there are emerging concerns that the economy may overheat.

In 1985 42% of consumer expenditure was spent via retail. In 1994 this had fallen to 36%. Nevertheless in the same period total sales in food grew from $ US 25.9 bln to $ US 30.3 bln.

Dutch Retail Structure

Holland has a high density of supermarkets with relatively small floor space. There are only a few hypermarkets or superstores. The Dutch supermarket sector is dominated by Albert Heijn (640 stores) with a market share of 27.2%. The Albert Heijn holding company, Ahold, also holds a majority stake in Schuitema n.v. After a period of concentration, 98% of the market is now in the hands of 6 major buying groups. However, members of these buying groups do retain some buying-decision making authority.



Super Unie		Vendex Food Groep		TSN	
De Boer/Unigro	10.9 %	Edah	8.1 %	C1000	8.5 %
Hermans	2.7 %	Basismarkt	1.3 %	Spar Schuitema	1.2 %
Other Super Unie	13.9 %	Konmar	2.7 %	Other Schuitema	0.8 %
Total Super Unie	**27.5 %**	Total Vendex	12.4 %	Total Schuitema	10.5 %
		Markant	3.6 %	Plusmarkt	2.6 %
		Total Radar Food	4.3 %	Total Sperwer	3.1 %
		Total Vendex Food	**16.7 %**	**Total TSN**	13.6 %

KEY FINDINGS

- Growth continues due to increased popularity of prepared meat, pasta and rice dishes; the consumer looks for convenience, variety and ethnic food
- There are important differences in buying behavior between the Netherlands on the one hand and Belgium/Luxembourg on the other hand
- Top marketing companies are successfully introducing new concepts; warm sauces are an important new segment
- American concepts (e.g. Tex-Mex) have established strong foothold

Market Size Netherlands
(retail sales, without condiments)

	1994	**1995**	**1996**	**1997***
Dfl mln	596	616	665	686
Kg Mln	137	141	152	157

* Estimated

Condiments

The dividing line between liquid condiments and sauces is difficult to define. For this market brief, we have defined liquid condiments as being those products which consumers use only in small quantities to enhance the flavor of a meal. In the Netherlands, important liquid condiments are: Maggi Aroma (Nestle) and ketjap (Indonesian soy sauce; diverse brands). Less important products are Worcester sauce and Tabasco.

Condiments in the Netherlands
(retail sales)

	1994	1995	1996
Dfl mln	121	129	141 = US$ 69 mln

Market Leaders in Belgium
In warm meal component sauces in Belgium Uncle Ben's (Master Food) is the market leader with a market share of 34.2%. The range was introduced in Belgium in 1989 and consisted of three tastes: sweet and sour, curry and chili. Sweet and sour developed into the number one item. Uncle Ben's introduced two new varieties: sweet and sour medium hot and sweet and sour with extra pineapple.

Knorr is the absolute leader in dry sauces in Belgium with a market share of almost 90%. In the assortment of pasta and rice sauces, the consumer can find besides the Italian products also a few Chinese sauces and other ethnic specialties like gyros and goulash.

In Belgium, the Tex-Mex market is smaller than in the Netherlands with a market size of US $ 2.1 mln in 1996. As in Holland, the market leader is Casa Fiesta.

In Belgium the originally local brand Devos & Lemmens (acquired by Campbell) is competing successfully against the multinationals with high quality products. Devos & Lemmens fast movers are the cocktail sauce (300 ml. and 550 ml.), mild mustard (300 ml.), Dijon mustard (300 ml), Belgian pickles (300 ml.), curry (300 ml) and mayonnaise (550 ml and 1100 ml). The warm meal sauces DL introduced at the end of 1997 (similar to the Calve range) have not yet realized strong sales.

Growth in Benelux from:

- wet cooking sauces (convenience) innovations
- meal component enrichers (e.g. vegetable sauces)
- fondue and BBQ sauces
- more frequent use of cold sauces

Market Segments Sauces
For the segmentation of this market three divisions are important:

- warm and cold sauces
- dry and liquid sauces
- complete meal sauces and meal component sauces

Some important sub segments are:

- x cold liquid meal component sauces: barbecue and fondue, dip, salsa, curry, ketchup, salad sauce, salad dressing, mayonnaise, French fries sauce, mustard
- x cold dry meal component sauces:
  barbecue and fondue, dip, salad dressings, herb butter, salad enhancer
- x warm liquid meal component sauces:
  meat and fish, sate and peanut, gravy, stock, vegetable, potato
  (for example: Chicken Tonight and Aardappel Anders)
- x warm dry meal component sauces:
  meat and fish, sate and peanut, gravy, vegetable, potato, basic (for example: Groentesmoor)

Belgium complete meal sauces: 1990 US $ 0.5 mln and 1996 US $ 11.8 mln (continuing annual growth 8%)

Figures for a Few Specific Market Segments

- ˜ Meal component sauces dry and liquid (1996 US $ 77.4 mln +23% of which liquid sauces like Aardappel Anders' now have a share of about 32.5%)
- ˜ Cold meal component sauces in the Netherlands 1995 US $ 130 mln; 1996 US $ 133.4 mln (+2% growth esp. in French fry sauces and salsa); 1997 US $ 137.8 mln. (+3% growth because of more frequent buying and high promotion efforts)
- ˜ Warm meal sauces dry and liquid in the Netherlands: 1996 US $ 113 mln (+6% has been caused mainly by growth of liquid sauces). The market of liquid complete meal sauces in the Netherlands can be divided in Italian US $ 18.5 mln and Non Italian US $ 23.9 mln. (1996)

Consumer Buying Behavior

- þ 60% of consumers decide in the shop whether to buy a meal sauce and which variety to choose
- þ Shift from dry mix to wet sauces in Netherlands
- þ Consumers prefer to see the sauce through the packaging
- þ Dutch consumers try out new tastes but often return to the basic products
- þ Advertising campaigns have a lot of impact. In the Netherlands promotional spending of manufacturers of sauces were in 1995 13.0% of supermarket sales and in 1996 even 15.2%.

Important Food Fairs

ROKA, Utrecht, Netherlands (food)	March 8-11, 1998	tel: + 31 30 295 59 11 fax: + 31 30 294 03 79
Tavola ,Kortrijk, Belgium (food and delicacies)	March 22-24, 1998	tel: + 32 56 21 55 51 fax: + 32 56 21 79 30
World of Private Label, Amsterdam, the Netherlands	May 26-27, 1998	tel: + 31 20 575 30 32 fax: + 31 20 575 30 93
SIAL, Paris, France (food)	October 18-22, 1998	tel: + 33 149 68 54 99 fax: + 33 147 31 37 75
Anuga, Köln, Germany (food)	April 11-15, 2000	tel: + 49 221 82 10 fax: + 49 821 34 10

Most Important Brands in the Netherlands

Brand	Holding Company	Product
Calve	Unilever	cold and warm sauces
Heinz	Heinz	cold and warm sauces
Gouda’s Glorie	Van Dijk Foods	cold sauces
Remia	Remia	cold sauces
Knorr	Bestfoods (CPC)	dry sauces and warm sauces
Unox	Unilever	warm meal sauces (only Chicken Tonight)
Maggi	Nestlé	dry meal sauces
Duyvis	Sara Lee	dry sauces
Honig	CSM	dry meal sauces
Casa Fiesta	Bruce Foods	tex-mex
McCormik	McCormik	dry sauces
Conimex	Best Food (CPC)	Indonesian meal sauces
Suzi Wan	Master Foods	Indonesian meal sauces
Uncle Ben’s	Master Foods	warm meal sauces
Grand Italia	Star (I)	Italian meal sauces
Devos & Lemmers	Campbell Foods	cold sauces
Koninklijke Brinkers		cold sauces

The private label share in The Netherlands in sauces is only 6%. (average 20%) This can be explained by the relatively high retail margin on branded products and the very innovative

character of the product group.
The five largest manufacturers of sauces in 1997 in the Netherlands were Unilever (Van den Bergh), Bestfoods (CPC), Honig, private label and Remia. (Source Nielsen). Nestlé (Maggi) expects in 1998 a growth of 10 to 20% for the Netherlands in the group of potato and vegetable sauces. 'The consumer buys these products most of the time on impulse. The use has not yet become a habit, but we will work on that via our advertising.'

Tex-Mex in the Netherlands

Casa Fiesta is the absolute market leader in tex-mex products in the Netherlands. With in total 40 items the brand holds a market share of 84.7%. Competitors Old El Paso (less than 5% market share) and Santa Maria (between 10 and 15 % market share) are way behind in the battle. The success of Casa Fiesta has been achieved by block merchandising in supermarkets. The total market for tex-mex products is estimated at US $ 5.8 mln (1997).

Most Important Brands in Belgium

Brand	Holding Company	Products
Devos & Lemmens	Campbell Foods	cold sauces, warm meals sauces and fonds
Heinz	Heinz	cold sauces
Miracoli	Kraft Jacob Suchard	Italian meal sauces
Calve	Unilever	cold sauces and warm meals sauces
La William		cold sauces
La Croix	Campbell Foods	fonds
Knorr	CPC Monda	dry sauces
Fondua	La William (B)	cold sauces
Unox	Unilever	warm meal sauces
Kraft	Kraft Jacobs Suchard	cold sauces
Manna		Italian meal sauces
Santane	Kraft Jacobs Suchard	cold sauces and salad dressings
Benedictine	Unilever	cold sauces
Vandermoortele		cold sauces
Reddy	Vandermoortele	salad dressing
Suzi Wan	Master Foods	Indonesian meal sauces
Casa Fiesta	Bruce Foods	Tex-mes sauces

Private labels are very important in all product segments in Belgium.

In Belgium private labels in sauces and condiments are far stronger than in the Netherlands. The consumption of sauces is more built on tradition. The Dutch market has a more innovative character.

A Dutch supermarket manager: 'The margins on the potato and vegetable sauces are almost 30% and we're very content about that. I would prefer to place them also in the vegetable department of my shop. The problem is a lack of space there and also our vegetable people have to get used to the idea of also selling groceries on their floor.'

Opportunities in Sauces and Liquid Condiments

- American regional specialties. Tex-mex sauces and food have already established a stronghold. Cajun is also fairly popular and is becoming well known
- Authenticity is increasingly important. Products with 'roots' have a good chance to become established.
- BBQ sauces with an original and unique character.
- Products with only natural ingredients or organic ingredients.
- Wet cooking sauces with excellent taste and positioned towards a particular meal/eating moment. Italian style meal component sauces are particularly popular, but the market is already crowded.

Merchandising

in this product segment is an important problem for retailers:

- differing merchandising advice from manufacturers
- presentation of Italian and ethnic sauces in blocked groups or combined with other sauces?
- combination with fish, meat and or vegetable counters?

Effective merchandising has a radical influence on sales:

- Trials have indicated that merchandising vegetable sauces at two spots in the supermarket means +66% in sales.
- A special boutique for specialty products, in for example, Delhaize has had a good influence on sales.

Advantages of Dry Sauces

- convenient to store at home
- long shelf life
- Do-It-Your self image
- lower price

Sauce Manufacturers have a strong Innovation Record:

Introductions in the Netherlands in 1997

- Jan '97 Remia introduced French Fries sauce (Vlaamse Fritessaus)
- April '97 Uncle Ben's introduced Goulash Sauce in their range Sauces of the World (475 gr.)
- May '97 Conimex replaced two cooking sauces (Madura and Malayan) with Hot Babi Pangang and Hot Ajam Pangang (500 gr)
- May '97 Koninklijke Brinkers introduced a double sauce (500 ml bottle with two snack sauces)
- June '97 Remia introduced 5 new so called Wereldsauzen ('Sauces of the World')
- June '97 Calve introduced Ravigote sauce (a cold sauce) to use with fish
- October '97 Knorr introduced 4 warm meal sauces
- November '97 Calve introduced 4 warm meal sauces (stroganoff, pepper cream, curry, mushroom) 240 ml US $ 1.31
- Jan '98 Remia ntroduced 5 500 ml top-down tubes (cold sauces) US $ 1.16

A Success Story

Calve Aardappel Anders (Nl) ('Potato in Another Way') 390 ml. US $ 1.60

Gratin sauce to be poured over raw peeled and sliced potatoes and put into the oven. Introduced in February 1996; in 1996 7,5 mln jars sold in The Netherlands (4 to 5 times more than was planned). Because of the enormous success in 1996, 3 other tastes were introduced in January '97 (tomato-cheese, mushroom-onion and spicy).

In Belgium Unilever has introduced the same product under the name 'Gratinoise' (3 tastes) (390 ml. US $ 1.81). Seems to be also successful but less so than in Netherlands.

Fresh (chilled) Sauces: A New Trend

Albert Heijn is leveraging increasing interest in gourmet products in the Netherlands. There are three lines of sauces in the chilled cabinet of a medium sized supermarket:

- Dairy company Mona has launched a fresh sauce range (mushroom cream, pepper cream and red pepper cream) 225 ml US $ 1.60
- Albert Heijn (private label) dip sauce 170 gr. US $ 1.94 (garlic, salsa, avocado, pesto and cheese)
- Buitoni 200 gr. US $ 1.94 (bolognese, mushroom, pesto and 4 cheeses)

At a Belgian GB Maxi hypermarket we found the following fresh sauces:

- Buitoni (same range)
- Sosanne sauces gastronomiques 200 ml. US $ 1.45
- Didden (12 items) 125 gr. US $ 1.55

Sauces and Health

Benelux consumers are apparently less heath-conscious whilst buying sauces. There are only a few light sauces in Mayonnaise (Calve and Kraft). Not much growth is expected. Calve Yogonaise is a low-cholesterol concept. Unilever sells Becel plant oil mayonnaise in both countries as part of a broad umbrella brand strategy. The Vitelina brand is quite successful in Belgium

Differences between the Netherlands and Belgium

- Belgians have traditionally the highest sauce consumption in Europe
- Belgians spend more on delicacies; the country has a strong culinary tradition
- Home made sauce is still very popular in Belgium
- Bi-lingual labels are required in Belgium
- In the Netherlands, the sauces department is dominated by mayonnaise and mayonnaise based salad dressing
- The market for pickles is small in the Netherlands
- Dry sauces are more important in Netherlands
- Price level of sauces in Belgium is higher than in the Netherlands

Top Tastes in the Netherlands	Top Tastes in Belgium
Garlic	Curry
Cocktail	Cocktail
Mushroom	Béarnaise
Sate	Tartar

Examples of Specific Products and Prices

Product	Brand	Contents	Price in US$
The Netherlands			
garlic sauce	Gouda's Glorie	750 ml	1.45
tomato ketchup	Heinz	1000 g	2.43
mayonnaise	Albert Heijn	650 ml	0.95
salad sauce	Euroshopper (Albert Heijn)	750 ml	0.58
mayonnaise (free range eggs)	Calve	500 g	0.95
Belgium			
salad dressing	Reddy	250 ml	1.18
mayonnaise	Devos & Lemmens	550 ml	1.76
chicken tonight	Unox	500 g	1.97
cocktail sauce	Delhaize	494 g	1.66
mayonnaise	Derby (Delhaize)	470 g	0.57
pickles	Devos & Lemmens	300 ml	1.03

these are service supermarket price leves

Food Law

Labeling Requirements

In general labeling must not be misleading. The following information must be on the label:

- the name of the product
- list of ingredients in descending order of weight
- net quantity in metric units (suggested, not yet required)
- the date of minimum shelf life
- special storage conditions or conditions of use
- the name of the 'sender'
- instructions for use (if necessary for appropriate use)

Many manufacturers also provide nutritional values on their packaging. This is obligatory when a nutritional claim is used on the label. There are specific, detailed regulation for all of the points made above. These regulations may differ from country to country within the EU and should be studied before finalizing packaging. All the above mentioned information must be given in the language or the languages of the region in which the product is to be sold. This means that in Belgium all packaging must be in both French and Flemish (Dutch).

Other Food law

Besides the labeling requirements, there are also regulations regarding inspection and sampling, food-additives, flavorings, pesticides and other contaminants, control and hygiene, radioactive contamination, products in contact with foodstuffs, provenance and origin and packaging and packaging waste. As mentioned before, these regulations are only partly harmonized within the EU. Most importers are well informed about these subjects.

Short list importers US food in Belgium

~	Bisschops Verachter	
	Mr. M. van Halder	tel +32 3 877 22 60
	Oudestraat 5,9630 Aartselaar	fax +32 3 877 23 67
~	Delby's n.v	
	Mr. Ph. Lambert	tel +32 3 870 97 40
	Kontichsesteenweg 38, 9630 Aartselaar	fax +32 3 870 97 41
~	Pietercil Resta	
	Mr. M. van Deun	tel +32 2 582 29 58
	Industrielaan 24, 1740 Ternat	fax +32 2 582 29 63
~	Van Hove bvba	
	Mr. R. van Hove	tel +32 3 480 68 25
	Industriestraat 14, 2500 Lier	fax +32 3 480 69 05
~	Zenobia	
	Mr. P. Cosse	tel +32 10 22 23 94
	Rue du grand Cortil 17, 1300 Wavre	fax + 32 10 222 799

Short list importers US food in the Netherlands

~	American Food Service b.v.	
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~	Boas b.v.	
	Mr. Th. Van Ham	tel +31 79 344 26 00
	Postbus 340, 2700 AH Zoetermeer	fax +31 79 342 17 22
~	Felix Cohen b.v.	
	Mr. F. Bertens	tel +31 162 68 41 20
	Postbus 50, 4920 AB Made	fax +31 1626 8 65 36
~	GranFood b.v.	
	Mr. O. Brokke	tel +31 70 381 50 07
	Postbus 19045, 2500 CA Den Haag	fax +31 70 385 02 59
~	Pietercil Barends b.v.	
	Mr. G.W. Rijsdijk	tel +31 79 344 11 00
	Postbus 273, 2700 AG Zoetermeer	fax +31 79 342 08 31
~	Sunshine Food b.v.	
	Mr. B. Boerema	tel +31 33 46 590 75
	Vanadiumweg 15, 3812 PX Amersfoort	fax +31 33 46 51 449

Short list importers health food in Belgium

~	Hagor (Distriborg)	
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~	Hygiena	
	Mr. J. Muyldermans	tel +32 3 776 34 61
	Oost Jachtpark 3, 9100 Sint Niklaas	fax + 32 3 778 14 13
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~	Revogan	
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Tariff Regulations and Requirements for US Exporters

The EU common customs tariff classification, import duty, VAT (Value Added Tax) and import certificates are an important but complex area for export into Europe. Import companies and transport companies with customs declaration facilities can assist you. To determine the customs tariff assessed on your product, please contact:

for the Netherlands:	for Belgium and Luxembourg:
Amsterdam Customs Office	Customs Office Ministry of Finance
tel + 31 20 586 75 11	tel + 32 2 210 32 86
fax +31 20 682 17 41	fax + 32 2 210 32 76
Att. Mr. J.H.F. Blom	Att. Mr. J.P. Coudur

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