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The Netherlands

Organic Products

The Dutch Market for Organic Food Products

2002

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Report Highlights:
The organic food market in The Netherlands is small but growing. There are also a number of product areas in which US exporters could feasibly gain share.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
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Executive Summary

Worried by a series of food scares, Dutch consumers are experimenting with organic foods. The main consumers of organic food are people under 35 without children. People over 55 are less interested in organic food products, partly due to their lack of knowledge about organic food. The Dutch Food Retail Organization (CBL) is forecasting that 10 percent of Dutch consumers will frequently eat organic food products by 2010.

In 2001, total organic food sales were about US$ 317 million, or about 1.5 percent of total Dutch expenditures on food and beverages. It is expected that total Dutch organic sales will increase to US$ 363 million in 2002. When the annual increase of 15-20 percent continues, the Dutch organic market is valued US$ 610 million by 2005. In 2001, supermarkets and natural food stores had a market share of 42 and 41 percent in total organic sales, respectively. In The Netherlands, fast food restaurants rarely make use of organic products and ingredients.

Dutch organic consumers buy only organic vegetables, fruit, potatoes, dairy products, eggs, bread, cereals, meat replacers and beverages. In addition, 48 percent of the organic consumers purchase organic meat on a regular basis. In the last couple of years, sales of organic dairy products and vegetables increased about 30 percent. In 2001, an average Dutch supermarket had 56 organic food products in its assortment compared to 48 products in 2000. The number and range of organic food products is minor compared to the UK, Germany and Denmark, where organic food product lines in some major supermarkets number between 750 and 1,000.

Dutch consumers are very price sensitive compared to consumers in certain other EU countries. In The Netherlands, organic food products sell at about a 20-50 percent premium over conventional products. The average Dutch consumer is not prepared to pay more than 5-10 percent extra. Therefore, Dutch food buying organizations increasingly import less expensive organic food products to be able to serve Dutch supermarket chains which want to widen their product range. On the other hand, The Netherlands is an important exporter and re-exporter of organic (outdoor) vegetables, fruit and potatoes. More than half of its production is exported. The main export destinations are the United Kingdom with a 60 percent market share, Germany (20%), Denmark (10%) and Austria (10%). The Netherlands also exports large volumes of organic dairy products, mainly to Germany.

Imports of U.S. organic raw materials are decreasing rapidly, due to high prices. At the moment, China and Brazil are the main competitors of the United States, since they offer cheaper raw materials which supposedly do not contain GMOs. Other competitors are former Eastern European countries, like Hungary and the Czech Republic. Current Dutch imports of U.S. organics with the "EKO" mark are: citrus fruit, apples and pears, dates, nuts and dried fruit, grains (rice, millet, flax), rice, pulses, seeds, oilseeds, and dry groceries. Reasonable opportunities exist for U.S. organic fresh fruit juices and convenience foods, like ready-to-eat meals. In general, organic food products with a high added value have more opportunities than organic raw materials in the Dutch market.

The Dutch Ministry of Agriculture, Nature Management and Fisheries is promoting organic agriculture. According to the Ministry, there are two reasons which hinder organic food sales in The Netherlands. First, organic food products are expensive relative to conventional products. Second, there is reportedly a supply and demand imbalance. Market development for organic agriculture is controlled and driven by a special ministry commission called "Taskforce Organics." One of the commission's tasks is to create an advertising campaign to educate Dutch consumers on the added value of organic foods. The main goal of the campaign will be to attract consumer groups that have not decided whether or not to buy organics. The objective is to increase supermarket organic sales from approximately 1.5 percent

in 2001 to 5 percent by 2004.

Exchange Rate			
Year	**U.S. $**	**EURO**	**Dutch florin (guilder)**
1998	1	-	1.98
1999	1	0.94	2.07
2000	1	1.09	2.39
2001	1	1.12	2.46

The Consumer

Worried by a series of food scares, certain Dutch consumers trying organic foods. Over half of Dutch consumers occasionally buy organic food products. About half of these consumers purchase organic food products for health reasons. Others are attracted to them due to environmentally friendly production methods, no use of chemical plant protection products, taste, and food safety. About 35 percent of Dutch consumers do not buy organic food products because of higher prices relative to conventional products. Conventional products are purchased because of price, availability, appearance and wide product range. The Dutch Food Retail Organization (CBL) has forecasted that 10 percent of Dutch consumers will frequently eat organic food products by 2010.

Reasons to Purchase Organic Food Products (%)	
Environmental friendly	51%
Health	49%
Taste	41%
No use of chemicals	28%
Supporting organic agriculture	14%
Quality	12%
Animal welfare	10%

Source: Platform Biologica, 2001

The main consumers of organic food are people under 35 without children. People over 55 are less interested in organic food products, partly due to their lack of knowledge about organic food. Average Dutch organic food product consumers are women with above average income and education. Of all consumers of organic foods 15 percent are termed "heavy buyers", 54 percent are "medium buyers" and 31 percent are "light buyers." The light and medium buyers are also called "part time organic consumers." Most "part time organic consumers" began by buying organic milk and have extended their organic shopping list since then. In 2000, 23.1 percent of all Dutch consumers bought organic dairy products. Heavy and light buyers purchase very different products. For example, 39 percent of the light buyers rarely buy organic bread, while 93 percent of the heavy buyers always eat organic bread.

Categories of Dutch Organic Consumers		
Heavy Buyers	**Medium Buyers**	**Light Buyers**
Called: "Post materialist" Counterculturalist/idealist who values: - no use of chemicals - environmental friendly production - no additives Buys mainly in natural food shops	Called: "Cosmopolist" Someone with a higher than average income and education who values: - health - environmental friendly production Buys in supermarkets as well as in natural food shops	Called: "Average consumer" Someone who is concerned about food safety who values: - health - food safety - taste Buys in supermarkets

Source: Albert Heijn, 2001 Albert Heijn’s target group is the category "Light Buyers".

Characteristics of Dutch Organic Consumers	
Gross Family Income (US$):	Market Share
< 16,250	20%
16,250 - 28,450	***31%**
28,450 - 40,650	25%
> 40,650	24%
Age:	Market Share
< 35 years	20%
35 - 55 years	**60%**
> 55 years	20%
Household Size:	Market Share
No children (at home)	**53%**
1 - 2 children	37%
> 3 children	10%
Buyer Type:	Market Share
Light buyers	31%
Medium buyers	**54%**
Heavy buyers	15%

Source: Platform Biologica, 2001 * Including many students and heavy buyers

Dutch organic consumers mainly buy organic vegetables, fruit, potatoes, dairy products, eggs, bread, cereals, meat replacers and beverages. In addition, 48 percent of organic consumers purchase organic meat on a regular basis. In the last couple of years, sales of organic dairy products and vegetables increased about 30 percent. Consumers under 35 do not care if they purchase their organic food products in a natural food shop or in a supermarket. Elderly consumers (> 55 years), however, prefer natural food shops.

Ranking of Organic Products Always Bought by Dutch Organic Consumers (%)	
1. Potatoes	66 %
2. Eggs	57%
3. Cereals, Muesli, Rice	51%
4. Vegetables and Fruit	47%
5. Dairy Products	47%
6. Bread	44%

Source: Platform Biologica, 2002

The Retail Sector

In 2001, total organic food sales were about US$ 317 million, or about 1.5 percent of total Dutch expenditures on food and beverages. In Europe, Denmark is taking the lead with a 5 percent organic market share, followed by Austria and Germany with 3 percent each. It is expected that total Dutch organic sales will increase to US$ 363 million in 2002. When the annual increase of 15-20 percent will continue, the Dutch organic market is valued US$ 610 million by 2005. Since durability is reported to be the main issue of Dutch agriculture policy in the 21st century, a further increase of organic sales is expected.

Share of the Main Product Groups in Total Organic Sales (%)	
Dry Foods	35%
Potatoes, Vegetables, Fruit	19%
Dairy Products	18%
Other	11%
Meat Products	10%
Bread	7%
Total	100%

Platform Biologica, 2002

Market Share

In 2001, natural food shops had a 41 percent share in the Dutch organic food market with a total turnover of US$ 129 million. There are approximately 380 natural food stores throughout The Netherlands. Only 25 stores are larger than 200m². In 2000, there was a big boost in the number of organic food stores, most of them under the name "Natuurwinkel," a franchising system for Dutch natural food shops.

The share of total organic food sales in supermarkets has increased from 19 percent in 1997 (US$ 36 million) to 42 percent in 2001 (US$ 134 million). The market share of supermarkets is still increasing, since natural food shops will increasingly be affected by the trend of one-stop shopping. According to Erik Hemmes, an independent Dutch retail consultant, the total supermarket turnover in organic food is about the same as total supermarket sales of magazines. By 2010, organic food products are expected to account for 2.4 percent of supermarket sales on average, up from 0.6 in 2001. Supermarkets which actively promote organic food products could boost that share to 5 percent of total sales. Within ten years, organic food supermarkets with a floor space of 500-1000m² are predicted to appear in the Netherlands. However, apart from supermarket chains Albert Heijn, Vomar (part of Superunie) and Konmar (part of Laurus), most Dutch supermarkets have not changed their marketing and product mixes to feature more organic food products. In the Netherlands, about 1,200 Dutch supermarkets now sell organic produce, up from 70 in 1995. Albert Heijn's "AH Bio" private label organic food products (265 in total) constitutes about 65 percent of total supermarket organic food sales. It is reported that Albert Heijn's (AH) organic products have a 3 percent share of total Albert Heijn's sales. Albert Heijn's objective is to increase its organic share to 5 percent in 2004.

Sales of Organic Products (billion US$)							
	1999	2000	2001		2002		2003
	US$	US$	US$	%	US$	%	%
Supermarkets	74	101	134	+33	61	+20	+15
Natural Food Shops	122	115	129	+12	138	+7	+10
Other Specialty Shops*	32	30	33	+10	39	+18	+10
Other**	16	18	21	+17	25	+19	+15
Total	244	264	317		363		

Source: Platform Biologica, 2002

* organic butchers, reform shops ** open air farm markets, direct farm sales, subscription, direct marketing, food service etc.

Ranking of Quality Aspects used by Supermarket Chain Albert Heijn to Purchase Food Products for their Stores
1. Availability 2. Food Safety 3. Quality 4. Respect for humans, animals and the natural environment 5. Ethics

Source: Albert Heijn, 2001

Assortment

In 2001, an average Dutch supermarket had 56 organic food products in its assortment compared to 48 products in 2000. In the Netherlands, an average sized supermarket sells about 15,000 different products and, therefore, the number of organic food products is still very small. According to the Dutch Agricultural Economic Research Institute (LEI), dry foods have a 42 percent share of the organic assortment. Dairy products, potatoes, vegetables and fruit make up 20 percent, while meat and bread account for a 10 percent share each. In 2001, Albert Heijn (AH) was chosen by Greenpeace and the Dutch environmental organization, "Milieudefensie," as the best organic food supplier in The Netherlands. At the moment, AH stocks organic food products in all of its 744 supermarkets in The Netherlands. The range of products currently covers all conceivable product categories, from vegetables through bread to tea and coffee, and numbers on average 113 different products in a store. Only 40 Albert Heijn stores sell organic pork and beef products. Other important organic food retailers are Vomar with 99 different products and Konmar with 88 products. Organic potatoes, vegetables, fruit, milk and buttermilk are the most popular products in supermarkets. The number and range of organic food products is minor compared to the UK, Germany and Denmark, where organic food product lines in some major supermarkets number between 750 and 1,000. In 2000, about 6,800 products produced by 844 Dutch manufacturers were registered as "organic products" by the Dutch certification organization SKAL.

Market Share of Organic Food Products in Total Sales (%)			
Product Group	**2001**	**Turnover (US$ million)**	**2004***
Potatoes, Vegetables, Fruit	3.0%	51	5.0%
Pork	1.3%	-	5.0%
Beef	3.9%	-	5.0%
Poultry Meat	0.9%	-	5.0%
Dairy Products	2.5%	51	5.0%
Bread	2.0%	-	5.0%

Platform Biologica, 2002 * The objective of the Dutch government is to increase supermarket organic sales from approximately 1.5 percent on average in 2001 to 5 percent by 2004.

Private Labels

Many Dutch manufacturers of branded food products do not want to produce organic foods, since they are afraid that their conventional food products will be perceived as lower quality. Even if a manufacturer produces organic food products and conventional food products, he often does not want the public to be aware of it. He gives his products another brand name or produces private label products for specific supermarket chains.

Albert Heijn offers all its organic food products under the "AH Bio" private label. More Dutch supermarket chains seem to be following this strategy as well. Organic private labels are a sign of quality, taste and food safety which adds a dimension to the supermarket's consumer appeal. Organic private labels should convince consumers that organic food products have an added value. In general, supermarket chains which offer organic food products under a private label, do not want to have branded organic products on their shelves. In addition, these supermarket chains prefer contract farming above deliveries thru auctions and/or wholesalers. It is expected, however, that a choice between different brands will encourage Dutch consumption of organic food products.

The Food Service

In The Netherlands, fast food restaurants hardly make use of organic products and ingredients. Only "Shakie's" and "New York Pizza" have organic snacks in their assortment. However, company canteens are using more and more for organic ingredients.

Prices

Dutch consumers are very price sensitive compared to consumers in neighbouring countries. Therefore, many Dutch wholesalers and retailers prefer cheaper import products above more expensive domestic products.

In The Netherlands, organic food products sell at about a 20-50 percent premium than conventional products. The average Dutch consumer does not want to pay 5-10 percent extra. At the moment, a very large price differential exists between organic and conventional poultry products, fruit juices, deciduous fruits, tomatoes, and jams. According to the Dutch Farmers Organization (LTO), however, the prices for conventional products are being kept at artificially low levels and, therefore, prices of organic food products seem to be extra expensive. Dutch food retailers claim that the high prices are caused by more labor intensive production, lower production capacities, more food products which have to be thrown away after exceeding their "sold by" date, promotional costs, and lower volumes. These extra costs have to be paid by organic farmers, retailers and consumers. When volumes increase, efficiency would increase and more attention could be paid to taste and added value. Therefore, Dutch food retailers are reportedly encouraging organic agriculture in The Netherlands.

Trade

Dutch Wholesalers are buying lower priced imported organic food products to be able to serve Dutch supermarket chains which want to widen their product range. This trend will depend on the stocks, quality and prices of Dutch organic food products. For example, there is a shortage of daily fresh glasshouse vegetables in The Netherlands at the moment. Therefore, The Netherlands is dependant on foreign organic fresh glasshouse vegetables. The Netherlands also imports potatoes, fruit, pork, beef, poultry products, cattle, and cattle feed, mainly from other EU countries.

The Netherlands is an important exporter and re-exporter of organic (outdoor) vegetables, fruit and potatoes. More than half of its production is exported. The main export destinations are the United Kingdom with a 60 percent market share, Germany (20%), Denmark (10%) and Austria (10%). The Netherlands also exports large volumes of organic dairy products, mainly to Germany. Large Dutch organic exports are mainly due to its central location and the slow development of the domestic market for organic food products. Foreign supermarket chains are more willing to pay higher prices for organic food products than Dutch supermarket chains.

Estimated Sales by Principle Dutch Trading Companies for Organic Fresh Produce in 2000 (US$ million)		
Eosta	vegetables, fruit	42
Nautilus	vegetables, fruit, potatoes, cereals, seeds, cattle feed	16
Odin	vegetables, fruit, mushrooms, flowers, plants, seeds, vegetarian products, meat, meat products, eggs, dairy products	14
Biocenter Zahn	vegetables, fruit, mushrooms, flowers, plants, dairy products	10
Kroon	vegetables, fruit, potatoes, vegetarian products, dairy products	4
Bick/Udea	vegetables, fruit, potatoes, mushrooms, vegetarian products, eggs, dairy products	4
Bakker	vegetables, fruit, potatoes, herbs, spices, mushrooms	4
The Greenery/Disselkoen	vegetables, fruit, potatoes, herbs, spices, mushrooms	2
De Zaaister	vegetables, fruit, potatoes, mushrooms, vegetarian products, meat, meat products, eggs, dairy products	2

Source: Aurelia, 2001

U.S. Trade
The quality of U.S. organic raw materials is very high, according to Dutch organic traders. However, imports of U.S. organic raw materials are decreasing rapidly, due to high prices. At the moment, China and Brazil are the main competitors of the United States, since they offer cheaper raw materials which are GMO-free. Other competitors are former Eastern European countries, like Hungary and the Czech Republic. Argentina is not really seen as an important competitor of the United States, since the exchange rate was too high until 2002. Also, Dutch consumers believe that organics from Argentina contain GMOs. Dutch organic product consumers are very concerned about GMO’s and consequently, they do not buy U.S. organic soy, corn, soy products and corn products.

Many U.S. certifying organizations are not accredited according to IFOAM standards. This makes it more difficult to get the Dutch "EKO" mark by the Dutch certifying organization, "Skal." Many U.S. organic products are seen as "natural products," since they supposedly cannot meet European organic standards. Consequently they are not allowed to carry the Dutch "EKO" mark. Current Dutch imports of U.S. organics with the "EKO" mark are: citrus fruit, apples and pears, dates, nuts and dried fruit, grains (rice, millet, flax), rice, pulses, seeds, oilseeds, and dry foods. Good opportunities exist for U.S. organic fresh fruit juices and convenience foods, like ready-to-eat meals. Because of the relatively high prices, due to the high US-dollar rate, U.S. organic food products with a higher added value have greater potential opportunities than U.S. organic raw materials in the Dutch market.

A General Overview on the Dutch Market for Organic Food Products
• Increasing consumer demand for organic food products • The market requires a continuation of availability for product quality, good taste and affordable prices • Supply does not equal demand for certain organic food products • A large price difference exists between organic and conventional food products • Intense competition between private labels and branded organic food products • Good communication with consumers and the different links of the supply chain is necessary • Product innovation is needed to meet consumer demand • Marketing efforts should be focused on the occasional buyers, so called "Light Buyers" • The organic image of processed food products is less clear than for fresh products • The small market is highly competitive due to numerous suppliers

Source: Office of Agricultural Affairs/The Hague, 2002

Policy

Organic products have been given official recognition under EU Regulation 2092/91 and the subsequent amendments thereof. The regulation provides consumer guarantees regarding production methods and principles applied to organic farming processing and marketing practices. The legislation applies to all products destined for human consumption including livestock which was added in June 1999. It does not cover textiles and forestry products. EU Regulation 2092/91 is implement by each member state. In The Netherlands, "Skal" is the responsible agency. Its activities, however, are not limited to The Netherlands. "Skal" has offices in Germany, Turkey, Sri Lanka, Suriname, Peru and India and conducts inspections in more than 30 countries.

In 2000, the European Commission developed an EU logo to identify organically produced foods under EC Regulation 331/2000. The logo provides a guarantee that the consumer is purchasing an organic product. Inspections are expected to be conducted by an appointed public authority or by an inspection body recognized in each Member State to ensure that standards are being met. Use of the logo is optional. The logo may be used in combination with other national or private logos used to identify organic products.

On September 7, 2001, the EU published Commission Regulation 1788/2001 establishing a certificate of inspection for imports from third countries. Starting on July 1, 2002, certifiers of US organic products will have to use the EU certificate for products exported to the EU.

There is no fee for authorization if carried out by EU government bodies. Some independent bodies may charge. US exporters should carefully choose the organization they use. This also applies to the certifying body they use in the US. Those having "IFOAM" status are considered to be the most competent.

Dutch Policy

The Dutch Ministry of Agriculture, Nature Management and Fisheries is promoting organic agriculture. According to the Ministry, there are two reasons which hinder the growth of organic food sales in The Netherlands. First, organic food prices are too high relative to conventional products. Second, supply does not equal demand.

Market development for organic foods is controlled and driven by a special Ministry commission called "Taskforce Organics." One of the commission's tasks is to devise an advertising campaign to convince Dutch consumers of the additional value of organic food products. The main goal of the campaign will be attracting consumer groups which have not yet made up their minds about organic food products.

The Dutch Food Retail Organization (CBL) participates in the "Taskforce Organics." CBL states in its "Action Plan for Stimulating Organic Sales," June 2000, that organic food products should get priority in Dutch supermarkets. For example, CBL agreed to provide more shelf-space for organic food products in general and for Dutch organic food products in particular in Dutch supermarkets. At the moment, however, the supply of some organic food products, like glasshouse vegetables and meat products, does not meet demand. In general, the supply of organic food products in the Dutch market is increasing by 10 percent per year. To increase supermarket organic sales from approximately 1.5 percent in 2001 to 5 percent by 2004, the "Taskforce Organics" has launched a US$ 8 million organic promotion campaign. This "enjoy life" campaign focuses on people around 30 years old, who like to travel and who value quality, taste and health. This target group accounts for 13.5 percent of all supermarket clients. The old target group of so called "adventurers" has already been served by the supermarkets and accounts for 2.5 percent of all supermarket clients.

Certification

"Skal" is the only organic certifying organization in The Netherlands. "Skal" is an independent, international operating organization which inspects and certifies sustainable agricultural production methods and products. "Skal" has been appointed as the sole organic inspection authority in The Netherlands by the Dutch Ministry of Agriculture. "Skal" closely examines the entire production process to ensure that it takes place as required by the EU organic regulations. If this is the case, "Skal" certifies the production method, and the product may carry the "EKO" quality mark. The "EKO" quality mark gives consumers the guarantee that the products meet the strict requirements for organic production.

Relevant Addresses

Skal
(Dutch certifying organization for organic products)
P.O. Box 284
8000 AJ Zwolle
The Netherlands
Tel: +31-38-4268181
Fax: +31-38-4213063
Email: info@skal.com
Internet: http://www.skal.com

Platform Biologica
(Dutch organization for organic agriculture and food products)
P.O. Box 12048
3501 AA Utrecht
The Netherlands
Tel: +31-30-2339970
Fax: +31-30-2304423
Email: info@platformbiologica.nl
Internet: http://www.platformbiologica.nl

Main Trading Companies for Organic Fresh Produce in The Netherlands			
EOSTA P.O. Box 348 2740 AH Waddinxveen The Netherlands	Tel: +31-180-635500 Fax: +31-180-638343 Email: volkerte@eosta.com Internet: www.eosta.com	Contact: Mr. Volkert Engelsman	vegetables, fruit
Nautilus Bronsweg 22 8222 RB Lelystad	Tel: +31-320-237000 Fax: +31-320-215883 Email: mfranzen@nautilusorganic.nl Internet: www.nautilusorganic.nl	Contact: Mr. Michiel Franzen	vegetables, fruit, potatoes, cereals, seeds, cattle feed
ODIN Holland c.v. De Panoven 1 4191 GV Geldermalsen The Netherlands	Tel: +31-345-572554 Fax: +31-345-577018 Email: Info@odin Internet: www.odin.nl	Contact: Mr. Jos van Hal	vegetables, fruit, potatoes, mushrooms, flowers, plants, seeds, vegetarian products, meat, meat products, eggs, dairy products
Bio-Center ZANN Marconistraat 1-11 3029 AE Rotterdam The Netherlands	Tel: +31-10-4775688 Fax: +31-10-4775070 Internet: www.zannorganics.com	Contact: Mr. Geoffrey Harreman	vegetables, fruit, mushrooms, flowers, plants, dairy products

Kroon BV Laagraven 15b 3439 LG Nieuwegein The Netherlands	Tel: +31-30-2899376 Fax: +31-30-2800839	Contact: Mr. C. Kroon	vegetables, fruit, potatoes, vegetarian products, dairy products
Bick/Udea BV Vluchtoord 41 5406 XP Uden The Netherlands	Tel: +31-413-256700 Fax: +31-431-256156 Email: info@ekoland.com Internet: www.ekoland.com	Contact: Mr. Erik Does	vegetables, fruit, potatoes, mushrooms, vegetarian products, eggs, dairy products
Bakker BV P.O. Box 1164 2990 CA Barendrecht The Netherlands	Tel: +31-180-695258 Fax: +31-180-695900	Contact: Mr. C.J.B. van Greuningen	vegetables, fruit, potatoes, herbs, spices, mushrooms
The Greenery International/Disselkoen P.O. Box 79 2990 AB Barendrecht The Netherlands	Tel: +31-180-655140 Fax: +31-180-655201 Email: b.linthorst@thegreenery.com Internet:www.thegreenery.com	Contact: Mr. Ben Linthorst	vegetables, fruit, potatoes, herbs, spices, mushrooms
De Zaaister V.O.F. Van 't Hoffstraat 6 9351 VH Leek The Netherlands	Tel: +31-594-515578 Fax: +31-594-515849	Contact: Mr. Paul Goorden	vegetables, fruit, potatoes, mushrooms, vegetarian products, meat, meat products, eggs, dairy products
Tradin Organic Agriculture B.V. Latexweg 12 1047 BJ Amsterdam The Netherlands	Tel. +31-20-4074499 Fax. +31-20-4972100 Email: gerard@tradinorganic.nl Internet: www.tradinorganic.nl	Contact: Mr. Gerard Versteegh	grains, cereals, flours, starches, rice, soy beans, nuts, seeds, dried fruits, pulses, coffee, cocoa, sugar, sweeteners, oilseeds, oils, bakery fats, tomato products, dairy products, frozen fruits and vegetables, fruit concentrates and purees and juices, freeze dried fruit products, canned fruits, animal feeds, oil cakes etc.
DO-IT (Dutch Organic International Trade) Prins Hendrikweg 19 3771 AK Barneveld The Netherlands	Tel. +31-342-423119 Fax. +31-342-423571 Email: andre@organic.nl Internet: www.organic.nl	Contact: Mr. André Pauw	soy beans, oils and fats, sugars and sweeteners, grains, seeds, pulses, nuts, dried fruits, rice, oilseeds, flours, starch, gluten, lentils, dairy products, pasta, cocoa, tomato products, fruit preserves etc.

Euroherb De Smalle Zijde 37 3903 LM, Veenendaal The Netherlands	Tel: +31-318-543288 Fax: +31-318-542458 Email: loe@euroherb.nl	Contact: Ms. Loes Scheeres	herbs and spices

Source: Platform Biologica, 2001

Main Players in the Dutch Market for Organic Processed Food Products			
Natudis P.O. Box 376 3480 AJ Harderwijk The Netherlands	Tel: +31-341-464211	Contact: Mr. M. Westering	*Organic food wholesaler* - specialized in dry foods brand: Biorganic brand: De Rit
De Nieuwe Band Noorderringweg 12 9363 TC Marum The Netherlands	Tel: +31-594-643355 Fax: +31-594-643385	Contact: Ms. Ria Engen	*Organic food wholesaler* - specialized in dry foods
Terrasana P.O. Box 70 2450 AB Leimuiden The Netherlands	Tel: +31-172-503333 Fax: +31-172-503355 Email: infor@terrasana.nl	Contact: Mr. K. Barnhard	*Organic food wholesaler* - specialized in delicacies
Wessanen P.O. Box 410 1180 AK Amstelveen The Netherlands	Tel: +31-20-5479547 Fax: +31-20-6459160 Email: info@wessanen-hq.com Internet: www.wessanen.com	Contact: Mr. Timo de Grefte	*Food multinational* - specialized in natural & specialty foods - owner of Tree of Life Inc., St. Augustine (U.S.A.) brand: Tree of Life brand: Zonnatura
Albert Heijn P.O. Box 3000 1500 HA Zaandam The Netherlands	Tel: +31-75-6599111 Fax:: +31-75-6313030 Email: john.valster@ahold.com Internet: www.ahold.com Internet: www.ah.nl	Contact: Mr. John Valster	*Food retailer* (part of Ahold) private label: AH Bio
Laurus N.V. P.O. Box 175 5201 AD Den Bosch The Netherlands	Tel: +31-73-6223622 Fax: +31-73-6223636 Internet: www.laurus.nl Internet: www.konmar.nl	Contact: Mr. R. Huitenga	*Food buying group* member: Konmar (supermarket chain)
Trade Service Nederland (TSN) B.V. P.O. Box 325 3800 AH Amersfoort The Netherlands	Tel: +31-33-4533600 Fax: +31-33-4550172	Contact: Mr. J. Mensinga	*Food buying group* member: Schuitema (food wholesaler)

Superunie B.A. P.O. Box 80 4153 ZH Beesd The Netherlands	Tel: +31-345-686666 Fax: +31-345-686600 Internet: www.superunie.nl	Contact: Mr. L. Holtman	*Food buying group* member: Vomar (supermarket chain)

Source: Platform Biologica, 2001

Publications on the Dutch Market for Organic Food Products (http://www.fas.usda.gov)		
Title of Report	**GAIN Report No**	**Date**
The Netherlands Organic Products, Benelux Organic Food Market 2002	#NL2008	2/1/2002
The Netherlands Retail Food Sector Report 2001	#NL1081	12/3/2001
The Netherlands Exporter Guide Annual Report 2001	#NL1072	10/12/2001
Retail Restructuring May Spur Sluggish Organic Food Sales 2001	#NL1052	7/18/2001
Market for U.S. Apples & Pears 2000	#NL0061	11/15/2000

Appendix

The Netherlands: The Six Largest Buying Organizations (Food Retailers and Food Buying Groups) in 2001			
Retailer/Wholesaler - type of outlet	**Sales/ Market share**	**Number of Outlets**	**Purchasing**
Albert Heijn, Food retail organization/food retailer, national multiple	US$ 5.5 billion 27.6 percent	744 nation wide	Direct, Imp./ wholesaler
Laurus Group, Food buying group for supermarket chains Super De Boer, Edah, Konmar, Spar Convencience, Groenwoudt Supermarkten, Basismarkt and ZHM	US$ 5.2 billion 26.0 percent	2,418 nation wide	Direct, Imp./ wholesaler
Trade Service Nederland (TSN), Food buying group for wholesalers Schuitema, A&P Holding and Codis	US$ 4.7 billion 23.6 percent	871 nation wide and regional	Direct, Imp./ wholesaler
Superunie, Food buying group for 18, usually family owned, regional supermarket chains	US$ 2.4 billion 11.9 percent	1,948 regional	Direct, Imp./ wholesaler
Aldi, Food retail organization/food retailer, national multiple	US$ 1.2 billion 6.2 percent	370 nation wide	Direct, Imp./ wholesaler
Koopconsult*, Food buying group for the regional wholesaler Samenwerkende Dirk van den Broek Bedrijven	US$ 0.7 billion 3.7 percent	176 regional	Direct, Imp./ wholesaler
IN TOTAL	**US$ 19.7 billion 99.0 percent**	**7,200**	**Direct, Imp./ wholesaler**

Source: AC Nielsen, 2001 and Information Resources, 2001 (*)

Note: 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
Independent supermarkets: who buy through Trade Service Nederland (like C1000)