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Netherlands

Market Development Reports

Revised - The Dutch Specialty Foods Market Report

2007

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U.S. Embassy

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Report Highlights:
This report gives a view of the specialty foods market in the Netherlands, its distribution and the opportunities for U.S. exporters.

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

Table of Contents

I. The Specialty Foods Market

Specialty foods represent those food products and beverages that are high value-added products because of the processing, packing and marketing involved. The specialty foods market covers a wide range of products within the consumer oriented agricultural products group, including snack foods, beverages, ethnic food products, breakfast cereals and sauces. Table 1 gives an overview of the value of the consumer oriented agricultural products imports on the Dutch market and the share of the United States.

Table 1: Dutch imports of Consumer Oriented Agricultural Products, million USD:

Country	**2006**
Germany	4,013
Belgium	2,698
France	1,342
Brazil	1,253
Spain	1,101
U.S.	580
South Africa	572
U.K.	561
Other countries	7,055
Total imports	19,175

Source: www.gtis.com/gta

Wholesalers, supermarkets and other retail outlets sell specialty foods in the Netherlands. Both small companies and large multinationals are domestically and internationally involved in the production process. The U.S. food processing industry continues to be an important supplier of specialty foods and competes in general with products coming from neighboring countries and France, the UK, Spain, Australia and Canada.

II. What drives the specialty food market?

The Dutch market for specialty foods continues to grow. What drives the demand for these high value added food products?

Changing demographics

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

Another factor that drives the market for specialty foods is the on-going trend towards smaller households. The average household size in the Netherlands is 2.2 with single and two person households growing and households of 4 or more persons declining. Not only does this trend demand smaller portions, industry contacts also claim that consumers tend to buy more expensive, value added products or meal components when cooking for only one or two persons.

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

Economical growth

The Dutch economy continues to grow by an estimated 3% this year. This positive trend is expected to continue in 2008. The unemployment rate in the Netherlands, currently at 4.5%, is the lowest in the past 5 years. The interest rate has been very stable and relatively low, which encourages consumption. Finally food has become relatively cheap, and consumers are spending only 15% of their income on food products.

Awareness of health and well-being

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

The Dutch traditionally have had a healthy and varied diet and are also quite sportive. For the younger generation buying light, sugar-free, low calorie or low-fat products has become normal. The demand for functional foods, although still very small, is growing.

Changing tastes

The Dutch population is one that's very open to new tastes, new products and new concepts. One of the reasons for its openness can be found in its history. The Netherlands has a long tradition in international trade.

Another reason can be found in its multi cultural society, especially in the cities of Amsterdam, Rotterdam and The Hague. Of the total 16.4 million inhabitants, almost 20% are of foreign descent, and the share and diversity continues to grow. Indonesians, Germans, Turks, Surinamese, Moroccans, Antilleans and Belgians dominate this group. The Netherlands' historical relationship with Indonesia, Surinam and the Netherlands' Antilles explains their presence. The Germans and Belgians are neighbors. The current large Turkish and Moroccan community can be explained because of young Turks and Moroccans that came to the Netherlands in the 60s and 70s to fill the gap in the Dutch labor market. The fact that several international organizations and companies have offices (in mainly The Hague and Amsterdam) has fueled the diversity of the Dutch population.

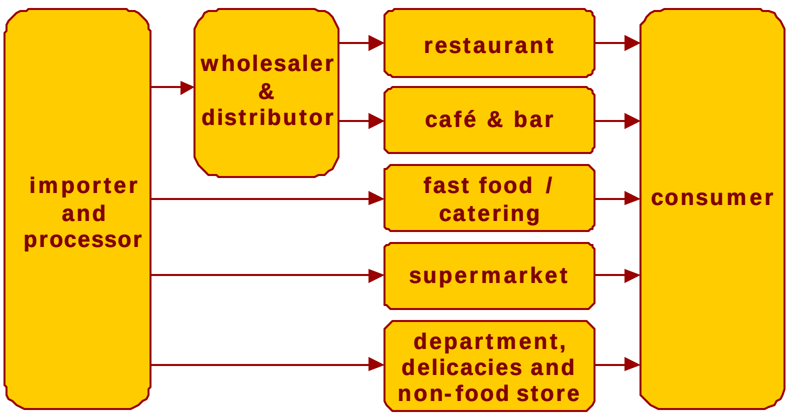
The Dutch like to travel. Annually over a million Dutch people go skiing in France, Austria and Switzerland while another good five million spend their summer holiday in France, Spain, Italy and Germany. Not only are more people traveling, they are also traveling more frequently and increasingly to new destinations in the Americas, Africa and Asia. Increased travel within Europe and especially outside the continent has triggered consumers to try those products and tastes once they are back home to relive their vacation.

As a result their diet has been influenced substantially. For a long time already they have stopped eating a typically Dutch meal: potatoes, meat and vegetables. The Asian kitchen, more specifically the Indonesian kitchen, can be considered the earliest influence that still has remained. Rice based dishes are now prepared once or twice per week. More recent influences come from Southern Europe, especially Italy. Pasta has gained enormous popularity and is now used twice or three times per week. Other cuisines that have impacted the Dutch cuisine include Tex-Mex and Surinamese.

III. Segmentation of the Dutch Food and Beverage Distribution Market

The Dutch food and beverage distribution market is estimated to be €41 billion. Of that, over 30% of sales are made within the foodservice industry with the remaining or €28 billion, made via food retailers. Industry analysts say that since the foodservice industry continues to grow faster than the food retail industry, it will gain market share and expect it to balance out to an estimated 35% for the Netherlands. This trend and number also applies to other North Western European countries.

Chart 1: the supply chain for specialty foods



Source: FAS/The Hague

The chart above gives a basic overview of the product flow for specialty foods in the Netherlands. All distribution channels buy directly from importers or production companies, except for restaurants and cafés & bars, who work with local distributors and wholesalers.

The foodservice industry

Restaurants

Restaurants dominate the Dutch foodservice industry and make up roughly 50% of the industry, or € 6.5 billion. Restaurant owners are generally independent operating entrepreneurs, working with both local suppliers and wholesalers. An overview of leading Dutch wholesalers and distributors are detailed in Appendix III. The 2[nd] largest foodservice segment, or over € 2.5 billion of the market, covers all cafés and bars, where the focus is mainly on serving drinks and to a much lesser extent finger foods and basic meals. Finally, a handful of international and national players dominate the much smaller fast food (20%) and catering industry (10%) and their products are delivered thro ugh proprietary large distributors.

The restaurant sector is within the foodservice industry the most interesting market for specialty foods. Not only is it the biggest sector, more importantly, this is the place were the consumer is exposed to new cuisines, tastes and concepts, often already established in the UK or US market. Asian cuisines account for one third of the Dutch restaurant sector. Restaurants that serve Chinese and Indonesian food are within this cuisine the most important. Other types of Asian cuisines that are becoming more popular are Thai and Indian. The enormous increase of wok restaurants has added to its popularity. Besides the Asian cuisine restaurants, the traditional Dutch and French cuisines cover a fair amount as well. The market for restaurants that focus on the popular Mediterranean cuisine (mainly Italian) has reached its peak. Although still limited, restaurants that focus on new international cuisines and develop new concepts represent the fastest growing part of the restaurant market segment.

The food retail industry

The turnover of the Dutch food retail industry is € 28 billion. The consolidated full service supermarkets sector makes around 90% of total food retail sales. The remaining 10% covers food sales made at department stores, delicacies stores and non-food stores.

All three sectors are important to the specialty foods industry. Consumers tend to start buying specialty food products after they have tried them (mostly in restaurants) or have read or heard about them. The openness of the Dutch, the multicultural society and the diverse restaurant industry, makes the Netherlands an interesting retail market for specialty foods.

Supermarkets

Supermarkets, and in particular the full service supermarkets, are of great importance for selling specialty foods. Discount supermarkets (like Aldi and Lidl) traditionally compete on price, offer a limited array of products and sell mainly private label products. As a result, discounters, accounting for approximately 10-15% of the market, are not considered the best platform for selling specialty foods. Full service supermarkets (like Albert Heijn, C1000, Jumbo, Plus), on the contrary, have a great potential for launching nationwide branded specialty foods.

Products, targeted for the evening meal, that have gained popularity over the years are spices, sauces, marinades, dried products, condiments, meal components (pasta, rice, noodles, tortillas) and ready-to-heat meals. Other popular products include beverages (wine, water, juices, soft drinks, tea), snack foods, bread toppings (marmalade, peanut butter), cake (mixes) and desserts.

Department stores, Non-food stores and Delicatessen stores

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

Non-food stores
It's not only the food retailers that face competition, foodservice companies have started sharing their market as well. Department stores like V&D (La Place formula) and HEMA,

do-it-yourself stores like Ikea, and garden centers like Intratuin have been extremely successful in attracting people to their restaurants. This industry's food sales is estimated to be valued at a third of a billion and some of them have only just begun. Whether the traditional supermarkets will move into this direction as well is not clear. One big difference with the U.S. is that the average Dutch supermarket is simply not big enough to have restaurant facilities. So far, no supermarket is experimenting in this area.

Delicatessen Stores
Compared to the large (hyper) supermarkets, delicatessen stores operate on a much smaller surface, on average 200 m2. Due to the limited space, location and, in some cases, opening hours, they mainly focus on non-perishable value added products. As a result, specialty foods have relatively more shelve space compared to full service supermarkets. In these locally oriented types of stores, product offerings are a reflection of the clientele.

Kosher food
The demand for kosher food in the Benelux region is primarily from kosher-observant Jews and the market is expected to remain stable in the near future. Only a few delicatessen stores in the Netherlands (in Amsterdam and The Hague) focus on selling kosher food due to the limited demand, as less than 5 percent of the estimated 30,000 Jewish citizens purchase kosher food products on a regular basis. The situation is somewhat different in neighboring Belgium where there is not only a larger Jewish community, an estimated 50,000, but the percentage that actually buys kosher food is higher as well, an estimated 10 to 20 percent. Although it has only approximately 10 stores, Antwerp is considered the main city for buying kosher food products in the Benelux region. Most kosher products are imported, including beverages, cereals, confectionary, dairy and meat products which are supplied mainly by producers in the UK, France, Israel and the United States. Shop owners have indicated that they import directly from the country of origin and trade with other stores. Kosher food products imported from the United States carry a number of different kosher certifications such as OU, OK and Star-K. Appendix 5 provides an overview of the main kosher food importers and distributors in the Benelux region.

IV. Opportunities for the U.S. Industry

The foodservice industry

Restaurants

FAS/The Hague sees opportunities in this market for those U.S. exporters who can supply wholesale volumes of quality products at competitive prices targeting the various cuisines.

As indicated in the previous section, the Dutch restaurant industry alone accounts for about 15% (=50% x 30%) of the total food distribution market. Also, the chefs that work in this part of the market are considered to be the pioneers in introducing new products, tastes and concepts into the market. Finally, the money conscious Dutch consumer is willing to pay more for food products in restaurants.

The market for Asian cuisine in the Netherlands is strong. Although the Chinese and Indonesian foods are the most popular, it's the Thai and Indian cuisines that are growing. The market for Mediterranean and French based cuisines is stable but popular. Restaurants that focus on new cuisines (like Japanese, African, etc.) are the fastest growers.

Café & Bar, fast food and Catering

FAS/The Hague sees no direct opportunities for U.S. exporters of specialty foods in this part of the market.

The Food Retail Industry

Supermarkets

FAS/The Hague sees opportunities for U.S. exporters in full service supermarkets.

The full service supermarkets are by far the largest market within the Dutch food distribution market since they cover 63% (=90% x 70%). Authentic ingredients, sauces, dry mixes or other products that can be used for meal preparation form an important category and have great potential for U.S. exporters. Another product category that continues to grow and where various U.S. companies have been successful in is bread spreads, baking ingredients, cookies and snacks. Beverages, both alcoholic and non-alcoholic, continue to be an important retail segment. The U.S. industry has been successful in selling juices, wines and (flavored) waters.

Department stores, Non-food stores and Delicatessen stores

FAS/The Hague sees opportunities for U.S. exporters in above stores since these stores differentiate themselves from mainstream supermarkets in their product offerings. Their total market share is rather small, an estimated 7% (=10% x 70%), but consumers in general are willing to pay extra premium when buyingfood products in these stores. Opportunities for the U.S. exporter differ from one store to another.

Department stores
Nearly all department stores in the Netherlands are part of a larger chain. The most well known are, in order of importance (market share), Hema, V&D and Bijenkorf. Hema (200 outlets) moved into selling food products a couple of years ago and has a strong position in meals and meal components, pastry, wines and snacks. Except for wines all products are private label. V&D (60 outlets) has been extremely successful with their La Place formula, a restaurant inside the store. Bijenkorf with its 12 outlets is considered to be the most upscale department store, selling high-quality and unique food products. Since their product offering is often related to a season or an event, it changes rapidly, although some products are on the shelves year round. U.S. products that have been successful at Bijenkorf are sauces, cocktail mixes, flavored nuts, caviar and mixes for cookies. These products face fierce competition from similar products from Italy, Spain, the U.K. Bijenkorf imports its products directly from the country of origin.

Non-food stores
In addition to the department stores, there are several other non-food retail chains like De Tuinen, Dille & Camille, Oil & Vinegar and Xenos, that sell food products. De Tuinen, with almost 70 outlets, targets the health conscious consumer by offering large varieties of tea (including tea from the U.S), fruit juices, spices, some organic products and several bread spreads (marmalade, peanut butter, stroop/syrup). U.S. products directly compete with products from South Africa and the U.K. De Tuinen works with local importers.

The Oil & Vinegar (35 outlets) and Dille & Camille (10 outlets) stores are popular places for consumers to buy presents. Here, consumers are willing to pay extra as well. Their food offerings focus strongly on specialty sauces, including gourmet Japanese sauces from the U.S. The main supplying countries are Australia and South Africa. Xenos has 120 outlets and focuses on ingredients and sauces for the Asian, Tex-Mex and Mediterranean cuisines for the price conscious consumer. Tea from U.S. is available at Xenos. The above -mentioned stores import, in general, directly from the country of origin.

Delicatessen stores
Delicatessen stores represent a mixture of independent stores. A huge variety of specialty foods have great opportunities in delicatessen stores. U.S. products that have been successful include various beverages (teas, wines, flavored water) mustards, cookies, flavored nuts and cake mixes. These products face direct competition from products from the U.K., Australia, and Canada. The small independent stores only work via local importers.

For a detailed ove rview of U.S. products currently available per segment, see Appendix 1.

Supermarkets, wholesalers and independent stores work mainly with specialized importers for buying specialty foods from third countries. Appendix 2 gives a detailed overview of the main importers of specialty foods.

U.S. exports to the Netherlands are subject to a set of import requirements and standards. The FAIRS report, which can be found at http://www.fas.usda.gov/scriptsw/attacherep/default.asp (report nr. NL 6025), discusses these import regulations.

V. Marketing

Trade Shows
Trade shows have proven to be an excellent platform for U.S. exporters to present their products. Many U.S. companies have found importers by participating in a trade show. For an overview of various trade shows that are visited by Dutch food buyers, please see table below.

Table 2: Trade shows frequently visited by Dutch food buyers

Show	When	Show Organizers
HORECAVA, Amsterdam, The Netherlands Hotel and Restaurant Show	January 07 – 10, 2008	tel: + 31-(0)20-5753032 fax: + 31-(0)20-5753093 www.horecava.nl
European Fine Food Fair Maastricht, The Netherlands Exclusive Hotel and Restaurant Show	January 21 – 23, 2008	MECC Maastricht tel: +31-(0)43-3838383 fax: +31-(0)43-383830 www.efff.nl
National Food Week Utrecht, The Netherlands International food and beverage trade show	Spring, 2009 Bi-Annual	tel: +31-(0)30-2952799 fax: +31-(0)30-2952814 www.nationalefoodweek.nl
European Seafood Exhibition, Brussels, Belgium **One of the world's largest seafood trade show** **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	April 22 - 24, 2008	tel: +1-207-8425504 fax: +1-207-8425505 www.euroseafood.com

Show	When	Show Organizers
FMI, Chicago, United States The largest international food trade show in North America. **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	May 04 – 07, 2008	tel: +1-202-4528444 fax: +1-202-4294559 www.fmi.org
World of Private Label (PLMA) Amsterdam, The Netherlands Private Label Trade Show	May, 2008	tel: +31-(0)20-5753032 fax: +31-(0)20-5753093 www.plmainternational.com
AGFTOTAAL, Ahoy Rotterdam, The Netherlands World Wide Fruit & Vegetable Trade show	Summer, 2009 Bi-Annual	tel: +31-(0)10-2933300 fax: +31-(0)10-2933399 www.agftotaal
ANUGA, Cologne, Germany. One of Europe's food & beverages largest trade show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	October, 2009 Bi-Annual	tel: +49-180-5204220 fax: +49-221-821991010 www.anuga.com
SIAL, Paris, France One of Europe's food & beverages largest trade show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	October 19 - 23, 2008 Bi-Annual Show	tel: +33-(0)1-49685498 fax: +33-(0)1-49685632 www.sial.fr
Horeca Expo, Gent, Belgium Hotel, Restaurant and Catering Show	November 18 – 22, 2007	tel: +32-(0)9-2419211 fax: +32-(0)9-2419475 email: horeca@flandersexpo.be www.horecaexpo.be

Reports

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

Report Number	Report Title	Date Released
NL5005	HRI Industry	03/2005
NL5010	Food Processing Industry	03/2005
NL5035	Food Retail Industry	11/2005
NL6025 / BE6007	FAIRS	08/2006
NL6036 / BE6009	Export Certification guide	09/2006
NL6064	Exporter Guide	10/2006
NL7002	Benelux Tree Nuts Market	01/2007
NL7008	Benelux Beef Market	04/2007

For more information on the Dutch specialty foods industry, please contact Marcel Pinckaers at marcel.pinckaers@usda.gov or +31 (0)70-3102.305.

Appendix 1: A selection of U.S. specialty foods currently available on the Dutch market

The Foodservice Industry

Wholesale

Category	Brand
Sauces, Seasonings, Spices	Skippy Peanut Butter Hellmans Mayonnaise Weaver Popcorn Mississippi Pancake Mix Louisiana gold Tabasco Casa Fiesta
Beverages	U.S. wines (E & J gallo and private label) Florida's Natural Ocean Spray

The Food Retail Industry

Supermarkets

Category	Brand
Bread spreads, Baking, Toppings, Cookies, Snacks	Skippy Peanut Butter Hellmans Mayonnaise Bosco Syrup Betty Crocker Dunkin Hines
Sauces, Seasonings, Spices	Oak Hill Farms Jim Beam Campbell's Louisiana gold Casa Fiesta Tabasco
Beverages	Arizona Tea Ocean Spray Celestial Seasoning Tea Snapple Hansen's Smoothie Wines

Department Stores

Category	Brand
	LT. Blender's Cocktail El Paso Chile Company Tabasco Pelican Bay Ltd. Bone Suckin' Sauce Wines Tabasco

Delicacies Stores

Category	Brand
	Arizona Tea Various soft drinks Hansen's Smoothies New York bagel chips Jim Beam sauces March mellows Cake mixes Eli's cheese cake

Non-food retail chains

Category	Brand
	Celestial Seasoning Tea Snapple Ton Ton Sauce

Appendix 2: An overview of the leading Dutch importers of specialty foods supplying both foodservice and food retail, in alphabetic order:

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

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

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

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

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

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

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

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

Appendix 3: An overview of the leading Dutch wholesalers and distributors, in alphabetic order:

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

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

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

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

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

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

Appendix 4: An overview of the leading Dutch supermarket chains, in alphabetic order, and their estimated market shares and supermarket formats, 2007:

Albert Heijn Provincialeweg 11 1506 MA, Zaandam, the Netherlands P: 31-(0)75-6599111 F: 31-(0)75-6313030 W: www.ah.nl	Estimated Market Share: 28% Supermarket formats: Albert Heijn
Aldi Erasmusweg 3 AK Culemborg P: 31-(0)345-472282 F: 31-(0)345-521692 W: www.aldi.nl	Estimated Market Share: 10% Supermarket formats: Aldi
Koop Consult Edisonstraat 11 2171TV Sassenheim	Estimated Market Share: 5% Supermarket formats: Dirk van den Broek Bas van der Heijden Digros Jan Bruijns
Lidl P.O. Box 198 1270 AD Huizen P: 31-(0)35-5287400 F: 31-(0)35-5264139 W: www.lidl.nl	Estimated Market Share: 5% Supermarket formats: Lidl
Superunie Industrieweg 22B 4153 BW Beesd P: 31-(0)345-686666 F: 31-(0)345-686600 W: www.superunie.nl	Estimated Market Share: 27% Supermarket formats: Jumbo Plus Spar Jan Linders Hoogvliet
Trade Service Netherlands (Schuitema) Databankweg 26 3821 AL Amersfoort P: 31-(0)33-4533600 F: 31-(0)33-4551087 W: www.schuitema.nl	Estimated Market Share: 16% Supermarket formats: C1000

Appendix 5: An overview of the main kosher food importers and distributors in the Benelux, in alphabetic order

The Netherlands:

Fromagerie Du Patron
Irislaan 71
2343 CH Oegstgeest
Phone: +31 (0)71 523 7400

Jacobs
Haverkamp 220
2592 BM The Hague
Phone: +31 (0)70 347 4980
Fax: +31 (0)70 383 7909

Mouwes
Kastelenstraat 261
1082 EG Amsterdam
Phone: +31 (0)20 661 0180
Fax: +31 (0)20 641 8345

Theeboom
2e Sweelinckstraat 5
1073 EG Amsterdam
Phone: +31 (0)20 676 0751
Fax: +31 (0)20 664 7215

Belgium:

Diskabel
Henri Chomestraat 52
B-1030 Brussels
Phone: +32 (0)2705 3504
Fax: +32 (0)2705 2864

Firma Feldman
Van Leriusstraat 1
B-2018 Antwerp
Phone: +32 (0)3232 2563

Firma Grosz
Terliststraat 28
B-2018 Antwerp
Phone: +32 (0)3231 8090

Firma Kind
Pelikaanstraat 118
B-2018 Antwerp
Phone: +32 (0)3233 7043

Hod Taim
Boulevard Jamar 51
B-1070 Brussels
Phone: +32 (0)2527 1852