

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY  
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT  
POLICY

Required Report - public distribution

**Date:** 6/25/2012

**GAIN Report Number:** NL2014

## **Netherlands**

### **Retail Foods**

#### **The Benelux Food Retail Market**

**Approved By:**

Mary Ellen Smith

**Prepared By:**

Marcel Pinckaers

**Report Highlights:**

The turnover of the Benelux food retail industry for 2011 is estimated at € 56.3 billion. For 2012, turnover is expected to increase by 2.5 percent. The retail market is fairly consolidated. Top 3 food retailers in the Netherlands have a market share of 64 percent while in Belgium the leading 3 retailers have 72 percent of the market. Sustainable food (including organic products) is one of the most important growth markets in food retail. The market share for private label products continues to go up in both Belgium and the Netherlands. The demand for convenient, healthy and new innovative products continues to be strong.

**Post:**  
The Hague

**SECTION I. MARKET SUMMARY**

**Benelux Food Retail Market**

Approximately 80 percent of the Dutch food retail outlets are full service supermarkets, operating on floor space between 500 and 1,500 square meters located downtown and in residential areas. Retailers with full service supermarkets have responded to the need of the Dutch to have these supermarkets close to their house. The remaining 20 percent includes mainly convenience stores (near office buildings and train/metro stations), some wholesalers and just a few superstores (convenient located alongside highways in shopping malls and industrial parks). The Belgians show a different shopping pattern. They prefer large supermarkets and superstores that are easy to access by car. In addition they increasingly appreciate having much smaller convenience stores, or superettes, close to their homes. In Belgium, full service supermarkets therefore account for an estimated 55 percent of the market. The share of convenience stores, superstores and wholesalers in Belgium is much higher than in the Netherlands, an estimated 45 percent. In all markets, independent food retail stores are increasingly leaving the scene. Shrinking margins and on-going consolidation in the retail market drive this trend.



Top 3 food retailers in the Netherlands, Albert Heijn, Jumbo (C1000, Jumbo and Super de Boer) and Aldi, have a market share of 64 percent. The market for discounters like Aldi and Lidl has decreased to 13.5 percent. Dutch discounters like Bas van der Heijden, Dirk van den Heijden and Digros were able to maintain their share of the market. In Belgium, the leading 3 retailers have 72 percent of the market. The market share of the Belgium discounter Colruyt also grew at the expense of German based Aldi and Lidl.

Table 1: Market Shares of Leading Food Retailers

Netherlands		Belgium	
Company:	Market share, percentage:	Company:	Market share, percentage:
Albert Heijn	33.6	Colruyt	27.1
C1000* (Jumbo)	11.5	Delhaize	22.8
Aldi	7.9	Carrefour	22.2
Plus	6.0	Aldi	11.1
Lidl	5.6	Louis Delhaize	5.4
Jumbo	5.5	Lidl	4.6
Super de Boer (Jumbo)	5.5	Makro	4.5
Other	24.4	Other	2.3
Total	100.0	Total	100.0

Source: DistriFood Retailplanner 2012, StoreCheck FoodGids 2012, FEVIA

\*Due to Jumbo’s acquisition of C1000, the latter will gradually disappear and transform into Jumbo

The turnover of the Benelux food retail industry is estimated at € 56.3 billion (€33.5 billion in the Netherlands and €22.8 billion in Belgium). For 2012, turnover is expected to increase by 2.5 percent since consumers are expected

to spend more food euros at retailers than in the HRI industry. Growth is expected to be found in the full-service supermarkets and convenience stores.

Table 2: Turnover Benelux food retail, billion Euros

2007	2008	2009	2010	2011	2012 *
47.7	50.5	52,7	54.5	56.3	57.8

Source: CBL, FEDIS, FEVIA

\* FAS/The Hague forecasts

The Benelux food market is highly productive and export focused. In meeting its customers' needs it also heavily depends on imports. Last year, the Netherlands imported USD 29.3 billion of consumer-oriented products, about a third came from neighboring Germany and Belgium. After Brazil and South Africa, the U.S. is the third largest non-EU supplier of consumer-oriented products. Over 2011, U.S. exports totaled USD 840 million, dominated by food preparations, tree nuts and beef. In the same year Belgium imported USD 22.2 billion of consumer-oriented products, with 60 percent originating from Germany, France and the Netherlands. U.S. exports of consumer oriented products totaled USD 413 million, led by tree nuts and fruit juices.

Table 3: Value of imports of Consumer Oriented and Fishery products, past 5 years, million USD

	2007	2008	2009	2010	2011
<b>Netherlands:</b>					
Consumer Oriented Products					
Total imports:	25,033	28,800	25,690	26,462	29,298
Imports from U.S.:	655	732	704	735	840
Fishery Products					
Total imports:	2,575	2,843	2,646	2,654	3,055
Imports from U.S.:	70	98	92	88	98
<b>Belgium:</b>					
Consumer Oriented Products					
Total imports:	19,662	22,043	19,824	19,431	22,244
Imports from U.S.:	270	319	274	287	413
Fishery Products					
Total imports:	2,046	2,197	1,907	1,945	2,236
Imports from U.S.:	30	27	32	39	54

Source: [www.gtis.com](http://www.gtis.com)

For fishery products the Benelux market also depends on imports. Last year, the Netherlands imported USD 3.1 billion of fishery products. Iceland is the largest supplier; the U.S. is the 7<sup>th</sup> largest non-EU supplier of fishery products. Over 2011, U.S. fish exports totaled 98 million, dominated by frozen fish fillets for further processing, cod, scallops and salmon. In the same year Belgium imported USD 2.2. U.S. fish exports totaled USD 54 million, led by scallops and salmon.

Table 4: The number and type of retail outlets in the Netherlands

Type of outlet:	Number of Stores:	Average floor space (M2):
Supermarkets	3,545	500 – 1,500
Superstores	30	1,500 – 5,000
Wholesalers	112	>5,000
Convenience Stores	718	<500

Source: Distrifood Retailplanner 2012

Table 5: The number and type of retail outlets in Belgium:

Type of outlet:	Number of Stores:	Average floor space (M2):
Supermarkets	2,853	500 – 1,500
Superstores	995	1,500 – 5,000
Wholesalers	410	>5,000
Convenience Stores	1,216	<500

Source: StoreCheck FoodGids 2012

### More Sustainable Food Products in the Netherlands

During the last decade, especially Dutch retailers have increasingly sourced food products which are either produced sustainably or obtained in a sustainable manner. The Dutch Ministry of Economic Affairs, Agriculture and Innovation recently published a report, Monitor Duurzaam Voedsel 2011, which gives an overview of consumer spending on sustainable food in the Netherlands. Sustainable food is one of the most important growth markets in food retail and foodservice markets. The turnover of sustainable food rose in 2011 by 30.5 percent while total spending on food in the same year only grew by 3.1 percent. As a result, the market share of sustainable food increased from 3.5 percent in 2010 to 4.5 percent last year.

But how is sustainable food being defined and measured? The MinAg defines as food whereby during production and processing, more than what is legally required, environmental, animal welfare and social aspects or criteria have been taking into account. In the report, two criteria have been used to measure the sustainability claim: 1) at consumer level the sustainability efforts are visible by a label or mark and 2) the control of this mark must be independent. In addition, it is more correct to actually speak of **more sustainable food** rather than **sustainable food** in order to indicate that it is a proportionally sustainable product. The emphasis is on the process towards sustainable.

Below labels or marks are examples of sustainable food products, recognized by MinAg:

Beter Leven:



Organic:



FAIRTRADE/Max Havelaar:



Label Rouge:



MSC:



Milieukeur:



Rainforest Alliance:



Scharrelvlees:



UTZ Certified:



Vrije Uitloop:



In the Netherlands, spending on sustainable food in 2011 totaled 1.75 billion Euros, up by 410 million Euros compared to 2010. Total spending on food, including sustainable food, amounted 38.9 billion Euros in 2011.

Table 6: Spending on sustainable food products, per label/mark, million Euros

Label/Mark:	2010:	2011:	Change in percentage:
Beter Leven	153.6	295.3	92.3
Organic	668.5	802.9	20.1
FAIRTRADE/Max Havelaar	155.9	188.3	20.8
Label Rouge	0.8	1.2	50.0
MSC	111.3	130.5	17.3
Milieukeur	31.4	30.1	-4.1
Rainforest Alliance	98.0	97.8	-0.2
Scharrelvlees	0.2	1.7	750.0
UTZ Certified	214.5	328.0	52.9
Vrije Uitloop	8.0	4.3	-46.3
Total	1,442.2	1,880.1	30.4
Products with more than 1 label or mark	102.3	131.5	28.5
Total	1,339.9	1,748.6	30.5

Source: Ministry of Economic Affairs, Agriculture and Innovation

What are the most recent developments per label/mark?

**Beter Leven:** The Beter Leven (or Better Life) is a system by the Dutch Society for the Protection of the Animals (or Dierenbescherming) which is widely accepted in the market. The amount of stars indicates the level of animal welfare friendly, <http://beterleven.dierenbescherming.nl/>

**Organic:** On July 1, 2010, the use of the EU organic logo became mandatory for prepackaged organic food produced in the EU. It may be accompanied by national (EKO) or private logos, <http://www.eko-keurmerk.nl/>.

**FAIRTRADE/Max Havelaar:** This mark continues to demonstrate growth. It focuses on raw materials and fresh produce such as bananas and pineapples, <http://www.maxhavelaar.nl/>.

**Label Rouge/Scharrel/Vrije uitloop:** The supply of more animal welfare friendly products grew strongly in 2011 and sales have doubled. Label Rouge, Scharrel and Vrije uitloop products are slowly being phased out as many of these products are provided with Beter Leven stars.

**Marine Stewardship Council:** The goal of the Dutch retailers association CBL to have all fisheries products MSC certified by 2011 has not been achieved mainly because the supply is still inadequate. MSC certified products have probably the best market penetration of all sustainable food labels and are widely recognized by consumers, [www.msc.org](http://www.msc.org). This year the first ASC (Aquaculture Stewardship Council) certified products, a label for aquaculture products, are being launched at the market, <http://www.asc-aqua.org/>.

**Milieukeur:** The Milieukeur mark, a mark for environment friendly produced products, is used less and less on packaging. Although not visible, it is a certifying system used by B-to-B, <http://www.smk.nl/>.

**Rainforest Alliance:** The use of the Rainforest Alliance logo has stabilized in the Netherlands, <http://www.rainforest-alliance.org/>.

**UTZ Certified:** Initially designed for coffee, UTZ now has programs for cocoa, tea, palm oil and cotton, <http://www.utzcertified.org/>.

In 2011, all food categories demonstrated growth, see below table. The highest gains were achieved in meat and meat products while the largest markets continue to be coffee, tea, cocoa and fresh produce.

Table 7: Spending on sustainable food products, per food category, million Euros

Food category	Spending in 2010	Spending in 2011	Change in percentage	Logo/mark
Fresh produce and potatoes	242.8	257.6	6.1	Organic, Max Havelaar, Fairforest Alliance, Milieukeur
Bread, bakery and breakfast cereals	67.5	75.1	11.3	Organic, Max Havelaar
Dairy	161.7	217.6	34.6	Organic, Beter Leven, Max Havelaar, UTZ Certified (for chocolate milk)
Eggs	48.1	59.3	23.3	Organic, Beter Leven, Vrije uitloop
Meat	122.5	235.1	91.9	Organic, Beter Leven, Milieukeur, Label Rouge, Scharrelkip
Meat products	25.9	37.4	44.4	Organic, Beter Leven, Milieukeur
Meat replacement	12.5	12.8	2.4	Organic
Coffee, tea, cocoa	337.0	406.6	20.7	Organic, UTZ Certified, Max Havelaar, Rainforest Alliance
Fish	109.5	129.6	18.4	Organic, MSC
Miscellaneous	212.4	317.4	49.4	Organic, Beter Leven, Max Havelaar, UTZ Certified, Milieukeur, Rainforest Alliance
<b>Total</b>	<b>1,339.9</b>	<b>1,748.6</b>	<b>30.5</b>	

Source: Ministry of Economic Affairs, Agriculture and Innovation

What are Dutch retailers doing ?

In May of this year, a new App was launched to help consumers of food products making responsible choices; the food products are measured on several sustainability aspects (animal welfare, effect on environment) and health, <http://www.superwijzer.com/site/superwijzer>.

The website [www.duurzaameten.nl](http://www.duurzaameten.nl) (eat more sustainable) is a platform for consumers to learn more about the available labels, marks and certificates on sustainability. In addition it provides a brief overview of some of the sustainable initiatives by Dutch food retailers.

Market leader Albert Heijn plans to have all their private label products produced and labeled sustainable by the end of 2015 by focusing on the following six product groups: coffee, tea, cocoa, soy, palm oil and seafood. Albert Heijn introduced the private label brand "Puur&Eerlijk". For seafood Albert Heijn would like to have all private label fishery products MSC certified, or equivalent, and all private label aquaculture products ASC certified by 2015. For two years now, Albert Heijn sells eggs from a Rondeel stable. This is a stable that is adapted to the needs of chicken en where they can potter about. The Rondeel eggs have the maximum 3 stars Beter Leven mark and are now also on the German market, <http://www.rondeeleieren.nl/>

PLUS supermarkets recently dedicated a TV commercial on their sustainability initiatives. The video focuses on FAIRTRADE bananas and pineapple and on sustainable fish, <http://www.youtube.com/watch?v=876eQks1C6k>.

Jumbo recently stated that in 2015 it wants to be the most sustainable supplier of meat products in the Netherlands. This year all pork on the shelves will receive the Milieukeur mark. Next year Jumbo plans to introduce antibiotics-free meat products. In addition Jumbo wants to pay more attention to the level of animal



welfare friendly. Also on the seafood side, Jumbo is taking steps; non-sustainable fishery products are being replaced by MSC certified products. Jumbo's C1000 recently introduced private label UTZ certified coffee. This coffee has been produced by farmers that comply with the social and economical norms and environmental criteria that have been established in the internationally accepted code of conduct of UTZ certified.

German based discounter Lidl wants to boost its assortment of sustainable food products. All cooled and frozen fishery products will be MSC certified while all fresh milk will carry the weidemelk logo. Finally all its private label chocolate products will only be using UTZ certified cocoa while at the same time expanding into FAIRTRADE/Max Havelaar.

DEEN supermarkets only sell fresh pork through their Sustainable Pork Value chain (KDV) with a Milieukeur mark. DEEN special focus has been on animal welfare and environmental concerns. Together with World Wild Fund, Stichting Noordzee and MSC, DEEN adapted its fish product by using the viswijzer, [www.goedevis.nl](http://www.goedevis.nl). Endangered species have been replaced by MSC certified fishery products.

More information on sustainability in the EU commodity market can be found in GAIN Report NL2004, [http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Sustainability%20in%20the%20EU%20Commodity%20Markets%20The%20Hague%20Netherlands%20EU-27\\_1-31-2012.pdf](http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Sustainability%20in%20the%20EU%20Commodity%20Markets%20The%20Hague%20Netherlands%20EU-27_1-31-2012.pdf).

**More Private Label products:**

The market share for private label products continues to go up in most European markets. The largest market shares are to be found in the Western European countries, led by Spain (49 percent), the U.K. (47 percent) and Portugal (43 percent). Belgium and the Netherlands had a market share of 40 percent and 36 percent, respectively. Market shares in the Nordic region and most of the Central and Eastern European countries are between 25 percent and 30 percent.

Research has shown that the market share of private label is higher in those markets that have a highly consolidated food retail structure in combination with professional and innovative retailers. Furthermore, in the Benelux market, retailers have developed two private labels, where one is mainly focused on price whereas the other is aiming at adding value. Consumers are discovering the good value for money that private label brands are offering and how they can be a good alternative for A-branded products.

Below table gives a good indication that private label not only grows in years of recession but also fare well in more prosperous times. The profitability of private label has increased retailers' interest to offer more private label products (e.g. gluten-free, healthy, and organic) and move into other areas of private label (e.g. bakery and cosmetics). The on-going expansion of local and international discounters continues to fuel the growing market for private label products as well.

Table 8: Private label as a percentage of the total food market

	1999	2011
Belgium	35	40
Germany	27	40
The Netherlands	21	36
France	22	36
Italy	12	20

Source: Private Label Manufacturing Association, 2012

**On-line Shopping offers potential:**

The market for shopping on-line as a percentage of the total retail (food and non-food) is according to the Institute of Grocery Distribution (IGD) expected to grow from 5 percent to 10 percent between 2010 and 2016. Although

the percentage is around 1 percent for just food according to industry contacts, it is a part of the market which offers a great potential. Within Europe, the largest market for on-line shopping of food products can be found in the U.K. In the Netherlands, Ahold’s Albert.nl recently acquired market leader Bol.com to further tap into the on-line shopping market. DeKa drive (shop-online and pick up groceries 7 days a week at the DeKa drive, www.dekadrive.nl) recently announced it plans to open 8 new DeKa drives next year. In Belgium, Delhaizedirect.be leads the way. Consumers in the age group 18-44 years shop most on-line driven by saving time and money. Key though for on-line shopping is a high quality on-line experience and a reliable delivery of the purchased goods. Shopping by using smart phones and tablets has boosted in the past two years.

**Blurring boundaries:**

Especially in the cities, Benelux consumers are shopping at different times and locations. During lunch breaks, people buy their lunch and dinner is bought on the way home. As a result innovative convenience stores, like “AH To Go”, “GB Express” and “Delhaize shop ‘n go” are opened at locations near heavy traffic like train stations, schools, and shopping malls. The traditional neighborhood grocery stores are in order to survive moving into this direction as well. Consumers request regional cuisine products (tex-mex, sushi, etc.) and fresh and convenient food products. These new convenience stores are in fact not so much competing with traditional supermarkets but more so with foodservice outlets like La Place, HEMA, Starbucks, Kiosk, McDonalds, Quick, etc.

**Awareness of Health and Well-Being**

Consumers are becoming more aware of and are more concerned about the effects food has on their health and well-being. There is a trend to a healthier lifestyle in Western countries. The following U.S. industries have all benefitted from this trend: nuts (pistachios, almonds, walnuts, etc.), fruits (cranberries, pomegranates, berries, etc.), seafood (like salmon, halibut, etc.). Consumers are looking for and finding more information on this topic; the media, including the Internet, TV and magazines, respond to this desire and feed into it. Food processors and retailers play a crucial role as well, as they develop and market food products to create, anticipate and meet consumers’ needs.

Table 9: Advantages and Challenges of the Benelux Food Retail Market

<u>Advantages</u>	<u>Challenges</u>
<i>Sector Strengths &amp; Market Opportunities:</i>	<i>Sector Weaknesses and Competitive Threats:</i>
Turnover figures indicate that the Benelux retail market is not being affected by the current economic conditions.	EU import regulation and tariffs. EU enlargement will give preferential access to products from new member countries.
Affluent, open minded and curious consumers create opportunities for new products.	Discounters fare well in the Benelux retail market; margins continue to be under pressure.
The region has an excellent infrastructure and therefore serves as a trading hub for Europe.	The industry is highly consolidated and therefore has a strong negotiating position.
Opportunities for healthy food products not sufficiently available on the local European market; e.g. tree nuts, seafood, (exotic) fruit, vegetables, juices, ingredients, etc.	Listing fees paid to retailers and money spend on creating brand awareness hamper the introduction of new U.S. brands.
The Benelux is a trading hub where importers make purchasing decisions for hundreds of millions of USD of Consumer-Oriented products that are transshipped to other European countries.	Sustainable food (including organic food) is one of the most important growth markets.
The Equivalency Arrangement on Organics offers ample opportunities especially as 75 percent of all U.S. exports of	



---

organics are traded by U.K. and Benelux importers.

---

Source: FAS/The Hague

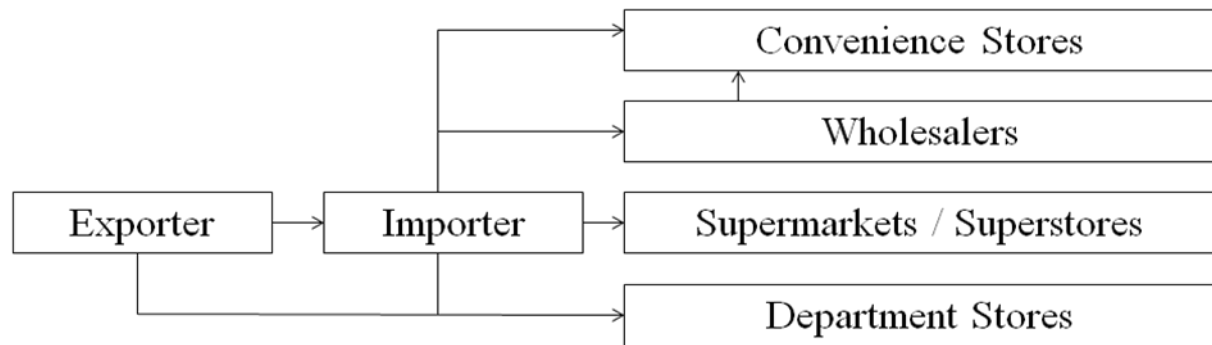
## SECTION II. ROAD MAP FOR MARKET ENTRY

U.S. exporters seeking to enter the Benelux market place have many opportunities, as indicated in above table. However there are a number of challenges (e.g. the import regulations and standards) U.S. exporters must meet before exporting to the Benelux market.

### Entry Strategy:

Success in introducing your product in the Benelux market depends mainly on knowledge of the market and building personal contact with knowledgeable and established importers. Prior to any export, invest in research that analyzes the Benelux food culture (concepts, flavor, price, requirements). Once the product has been chosen, be aware of fierce competition. There are tariff and non-tariff trade barriers that can complicate exporting to the Benelux market. The EU also has several FTAs which may advantage other 3<sup>rd</sup> country competitors. An importer knows the market, the trade barriers and the required documentation. The Office of Agricultural Affairs (OAA) offers guidelines on business practices and import regulations. The OAA also maintains lists of Benelux buyers (FBL lists). For a complete overview of offered reports, see Section V of this report.

### Market Structure:



Source: FAS/The Hague

The vast majority of supermarkets and superstores buy foreign (specialty) products via specialized importers. This is especially the case for retail-ready consumer-oriented products like sauces, beverages and snack products. Convenience stores operate, in general, on a much smaller scale and therefore often buy smaller quantities through wholesalers. Department stores work either through importers or buy directly from U.S. exporters. Many imported Intermediate and even some consumer-oriented products are often processed, mixed or packed before being sold to the consumer. Products like nuts, fresh produce, wine and in most cases fish products fall in this category.

Retailers increasingly have their stores divided in different categories. For each category they will have 2 or 3 preferred suppliers who are responsible for supplying the full range of products within the category. This way, the retailer negotiates with just a handful of suppliers for fruits & vegetables, meat products, seafood products, groceries, beverages, bakery products, etc. For the international specialty products (covering branded retail ready U.S. products) area within supermarkets, retailers usually work with only one or two specialized importers who are responsible for selecting products and filling those shelves.

As described in Section I, the retail industry in the Benelux is rather consolidated; however, on the purchase side the industry is even more consolidated since several smaller retailers have joined forces. The following figures will give you an overview of the different buying combinations in the Netherlands and Belgium.

Table 10: Leading Buying Groups in The Netherlands

Purchase Group:	Market Share, percentage:	Company name:
Albert Heijn Provincialeweg 11 1506 MA Zaandam <a href="http://www.ah.nl">www.ah.nl</a>	33.6	Albert Heijn, AH XL, Albert.nl, AH To Go
Superunie Industrieweg 22B 4153 BW Beesd <a href="http://www.superunie.nl">www.superunie.nl</a>	29.6	Sperwer (PLUS), Jan Linders, Vomar, Spar, Coop, Hoogvliet, Dirk van de Broek, Bas van der Heijden, etc.
Bijeen Laanakkerweg 4 4131 PA Vianen <a href="http://www.bijeen.com">www.bijeen.com</a>	22.5	C1000, Jumbo, Super de Boer
Aldi Pascalweg 21 4104 BE Culemborg <a href="http://www.aldi.com">www.aldi.com</a>	7.9	Aldi
Lidl Huizermaatweg 45 1273 NA Huizen <a href="http://www.lidl.nl">www.lidl.nl</a>	5.6	Lidl

Source: Distrifood Retailplanner 2012

Table 11: Leading Buying Groups in Belgium

Purchase Group	Market Share, percentage	Store name
Carrefour Olympiadenlaan 20 B-1140 Brussels +32 2729 2111 <a href="http://www.carrefour.eu">www.carrefour.eu</a>	22.2	Carrefour Hyper/Planet, Carrefour Market/GB, Carrefour Express, ROB
Delhaize Group Osseghemstraat 53 B-1080 Brussels +32 2412 2111 <a href="http://www.delhaizegroep.com">www.delhaizegroep.com</a>	22.8	Delhaize Belgie, AD Delhaize, Delhaize City, Proxy Delhaize, Delhaize Supermarket and Delhaize Shop 'n Go, Tom & Co

Colruyt Steenweg op Edingen 196 B-1500 Halle +32 2360 1040 <a href="mailto:colruyt@colruyt.be">colruyt@colruyt.be</a> <a href="http://www.colruyt.be">www.colruyt.be</a>	27.1	Colruyt, Bio-Planet, Spar, Dreamland, Spar/Eurospar, OKay
Aldi Keerstraat 4 B-9420 Erpe-Mere +32 5382 7272 <a href="http://www.aldi.be">www.aldi.be</a>	11.1	Aldi
Louis Delhaize Rue de Ligne 13 B-1000 Brussel +32 2229 2850 <a href="http://www.supermarche-match-supermarkt.be">www.supermarche-match-supermarkt.be</a>	5.4	Louis Delhaize, Cora Belux, Delfood, Delitraitteur, Match Belux, Smatch Belux, Profi
Lidl Guldensporenpark blok J nr. 90 B-9820 Merelbeke +32 9243 7400 <a href="http://www.lidl.be">www.lidl.be</a>	4.6	Lidl

---

Source: AC Nielsen, StoreCheck FoodGids 2012, USDA estimates

#### A. SUPER STORES, SUPERMARKETS, HYPER MARKETS OR SUPER CENTERS, CLUBS AND WAREHOUSE OUTLETS

Table 12: Supermarkets and Super Stores

Name	Format	Stores	Ownership	Locations
Netherlands				
Albert Heijn	Supermarket	769	Royal Ahold	Nation wide
Deen	Supermarket	61	Deen	Regional
Aldi	Supermarket	488	Aldi	Nation wide
Lidl	Supermarket	346	Lidl	Nation wide
DeKaMarkt	Supermarket	86	DeKaMarkt	Regional
Emté	Supermarket	107	Sligro Food Group	Regional
Hoogvliet	Supermarket	60	Hoogvliet	Regional
Jan Linders	Supermarket	55	Jan Linders	Regional
Jumbo	Supermarket	223	Jumbo	Nation wide
C1000	Supermarket	400	Schuitema	Nation wide

Plus	Supermarket	269	Sperwer Groep	Nation wide
Poiesz	Supermarket	59	Poiesz Supermarkten	Regional
Super de Boer	Supermarket	135	Jumbo	Regional
Coop	Supermarket	147	CoopCodis	Nation wide
AH XL	Super Stores	30	Royal Ahold	Nation wide
Vomar	Super Stores	55	Vomar	Regional
Belgium				
AD Delhaize	Supermarket	227	Delhaize Group	Nation wide
Delhaize Belgie	Supermarket	805	Delhaize Group	Nation wide
Bio Planet (Organic)	Supermarket	6	Colruyt	Nation wide
Colruyt	Supermarket	214	Colruyt	Nation wide
Champion	Supermarket	67	Mestdagh	Nation Wide
Delhaize City	Supermarket	18	Delhaize Group	Nation wide
Delhaize Proxy	Supermarket	191	Delhaize Group	Nation wide
Eurospar	Supermarket	265	Colruyt/Spar	Nation wide
Carrefour GB Contact	Supermarket	400	Carrefour	Nation wide
O'Cool	Supermarket	107	Frost Invest	Nation wide
Match Belux	Supermarket	65	Louis Delhaize	Nation wide
Aldi	Supermarket	928	Aldi	Nation wide
Lidl	Supermarket	298	Lidl	Nation wide
Intermarché	Supermarket	77	Intermarché	Nation wide
ROB	Super Stores	1	Carrefour	Nation wide
Cora Belux	Super Stores	9	Louis Delhaize Group	Nation wide
Delhaize Supermarket	Super Stores	140	Delhaize Group	Nation wide
Carrefour Hyper	Super Stores	45	Carrefour	Nation wide

Supermarket - retail surface  $\leq 1,500$  m<sup>2</sup>  
Super Stores – retail surface  $> 1,500$  m<sup>2</sup>

#### Department Stores

Table 13: Department Stores

Name	Stores	Ownership	Locations
Netherlands			
Bijenkorf	3	Selfridges	Nation wide
HEMA	492	Lion Capital LLP	Nation wide
V&D	62	Sun European	Nation wide
Belgium			
HEMA	87	Lion Capital LLP	Nation wide
Inno	15	METRO	Nation wide

#### Discounters

Table 14: Discounters

Name	Stores	Ownership	Locations
------	--------	-----------	-----------

Netherlands			
Aldi	488	Aldi-Gruppe	Nation wide
Lidl	346	Lidl & Schwarz	Nation wide
Dirk van de Broek	53	Dirk van de Broek	Nation wide
Bas van der Heijden	27	Bas van der Heijden	Nation wide
Digros	16	Digros	Nation wide
Belgium			
Colruyt	214	Colruyt	Nation Wide
Aldi	928	Aldi Inkoop	Nation Wide
Lidl	298	Lidl Belgium GmbH & Co KG	Nation Wide
Tecno	63	Tecno N.V.	Regional

## B. CONVENIENCE STORES, GAS MARTS, KIOSKS

Table 15: Convenience Stores

Name	Ownership	Locations
Netherlands		
AH To Go	Royal Ahold	Regional
CoopCompact	Coop Supermarkten	Nation wide
Kiosk	Servex	Nation wide
Spar	Spar Holding	Nation wide
Troefmarkt	Van Tol Retail	Nation wide
Buurtwinkels	Van Tol Retail	Nation wide
Attent	Spar Holding	Nation wide
Attent Super op Vakantie	Spar Holding	Nation wide
Belgium <sup>1</sup>		
Delitraiteur	Louis Delhaize Group	Nation wide
BLOC	BLOC	Nation wide
Carrefour Express	Carrefour	Nation wide
Okay	Colruyt	Nation wide
Tecno	Tecno	Nation wide
Spar	Lambrechts/Spar	Nation wide
Prima	Huygebaert	Nation wide
Profi	Louis Delhaize	Nation wide
Smatch	Louis Delhaize	Nation wide
Louis Delhaize	Louis Delhaize Group	Nation wide
Supra	Lambrechts	Nation wide
Night & Day	Night & Day Presse	Regional
White Night	Louis Delhaize Group	Regional

<sup>1</sup> In Belgium convenience stores are often called superettes

“AH to go” are situated at train stations, busy shopping streets and business districts, products sold are ready to eat meals, and other meal components or snacks.

Source: AC Nielson

Table 16: Gas Marts

Name	Ownership	Gas Company	Locations
Netherlands			
On the Run/Snack & Shop	ExxonMobil	ESSO	Nation wide
Shell Station	Shell	Shell	Nation wide
Texaco Service stations	Chevron	Texaco	Nation wide
Café Bonjour	Total	Total	Nation wide
Wild Bean Café	British Petroleum	BP	Nation wide
AH To Go	Royald Ahold	Shell	Nation wide
Belgium			
Delhaize Shop ‘n Go	Delhaize Group	Q8	Nation wide
Shell Station	Shell	Shell	Nation wide
On the Run/Snack & Shop	ExxonMobil	ESSO	Nation wide
Q8 Shops	Q8	Q8	Nation wide
Texaco Shops/GO shops	Chevron	Texaco	Nation wide
Total Shop/Café Bonjour	Total	Total	Nation wide

Source: AC Nielson

Table 17: Wholesalers

Name	Ownership	Locations
Netherlands		
Hanos (incl. ISPC)	Royal Ahold	Nation wide
VHC	Maxxam C.V.	Nation wide
Makro	Metro Cash & Carry	Nation wide
Sligro (incl. VEN)	Sligro Food Group	Nation wide
Belgium		
ISPC	ISPC	Nation wide
Delfood	Louis Delhaize	Nation wide
JAVA	JAVA	Regional
Makro	Metro Cash & Carry	Nation wide

### C. TRADITIONAL MARKET – “MOM AND POP” SMALL INDEPENDENT GROCERY STORES AND WET MARKETS

Grocery stores, butcher stores, bakeries etc. increasingly face competition from food retail chains. Through extra service, sales of high-quality added value products and the serving of niche markets, they try to survive. Traditional butcher shops and fruit & veggie shops are becoming specialty shops and high-end caterers, while traditional bakery shops are moving into pastry and artisanal specialty breads.



### SECTION III. COMPETITION

Knowledgeable and experienced traders, excellent logistics, a highly sophisticated processing industry, a professional distribution channel and affluent consumers make the Benelux an attractive export market.

The Benelux is (except for several horticultural products) in general not the most competitive producer of bulk and intermediate products, due to the high prices for agricultural land and labor, lack of scale and multiple rules and regulations. The Benelux however has a highly sophisticated processing industry. As a result, the Benelux increasingly is dependent on stable supplies of bulk and intermediate products (like grains, seafood, fruit juices, fresh produce, nuts, meat, etc.) from other EU member states and third countries. In addition to sufficiency, the Benelux also depends on other countries, especially Southern Hemisphere countries, for the year-round availability of fresh fruit and certain vegetables. Another reason why importers and food distributors turn to foreign markets is to look for unique products. This can be both new products and well-known products that are different one way or another. U.S. beef, beverages, fruits, nuts, sweet potatoes, and a full range of specialty food products have gained popularity over the years.

Table 18: Netherlands' U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented and Fish & Seafood Products, (value in million US \$), 2011

Product Category	Main Suppliers, in percentage	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
PG 30 Breakfast Cereals			
Total Imports	US\$ 1,448	1. Belgium 32.3 2. Germany 29.3 3. France 8.6 15. U.S. 0.7	Distance, availability and regional products Developed processed food industry
PG 31 Snack Foods			
Total Imports	US\$ 129	1. Belgium 44.9 2. Germany 23.3 3. France 13.0 11. U.S. 0.3	Distance, availability and regional products Developed confectionary industry
HS 02: Meat and Edible Meat Offal			
Total Imports	US\$ 5,067	1. Germany 23.6 2. Belgium 15.3 3. Brazil 14.6 12. U.S. 2.0	1,2: distance and availability 3: price/quality ratio Focus on dairy production instead of beef production
HS 03: Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates			
Total Imports	US\$ 2,741	1. Germany 14.4 2. Iceland 14.3 3. Belgium 7.3 10. U.S. 3.3	2: great variety and availability due to geographical location 1: large processing industry Long tradition in seafood trading; Good geographical location
HS 04: Dairy Produce; Birds' Eggs; Natural Honey			
Total Imports	US\$ 4,298	1. Germany 44.8 2. Belgium 17.5 3. France 10.1 16. U.S. 0.3	1,2,3: Proximity Great tradition of producing milk and milk based processed products
HS 07: Edible Vegetables And Certain Roots And Tubers			

Total Imports	US\$ 2,769	1. Spain 26.5 2. Belgium 15.0 3. Germany 12.9 15. U.S. 1.1	1: different climate/varieties 2,3: proximity	Great innovative industry producing horticultural products
HS 08: Edible Fruit And Nuts; Peel Of Citrus Fruit Or Melons				
Total Imports	US\$ 5,892	1. S. Africa 13.5 2. Chile 9.3 3. Spain 8.9 9. U.S. 4.6	1,2: different climate/supply season/taste/varieties	Products not (sufficiently) available on the local market
HS 09: Coffee, Tea, Mate And Spices				
Total Imports	US\$ 1,374	1. Belgium 19.9 2. Germany 15.2 3. Switzerland 9.3 41. U.S. 0.2	1, 2: trading tradition	No domestic availability
HS 16: Edible Preparations of Meat, Fish, Crustaceans, Molluscs or other Aquatic Invertebrates				
Total Imports	US\$ 2,038	1. Brazil 24.4 2. Belgium 19.3 3. Germany 13.9 24. U.S. 0.2	3: price / quality ratio	Not (sufficiently) domestically available
HS 19: Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares				
Total Imports	US\$ 1,813	1. Belgium 33.0 2. Germany 25.5 3. France 9.7 13. U.S. 1.0	Proximity and re-export	Not (sufficiently) domestically available
HS 20: Preparations Of Vegetables, Fruit, Nuts, Or Other Parts Of Plants				
Total Imports	US\$ 3,389	1. Belgium 16.214.7 2. Brazil 14.4 3. Germany 3.7 8. U.S.	Price / quality ratio	Not (sufficiently) domestically available
HS 21: Miscellaneous Edible Preparations				
Total Imports	US\$ 2,151	1. Germany 21.8 2. Belgium 15.6 3. France 8.2 5. U.S. 7.2	Proximity and re-export	Not (sufficiently) domestically available
HS 22: Beverages, Spirits, Wine and Vinegar				
Total Imports	US\$ 3,832	1. Germany 22.7 2. France 22.1 3. Belgium 15.1 8. U.S. 2.5	Excellent regional products	Not (sufficiently) domestically available

Source: [www.gtis.com](http://www.gtis.com)

Table 19: Belgium's U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented and Fish & Seafood Products, (value in million US \$), 2011

Product Category	Main Suppliers, in percentage	Strengths of Key supply Countries	Advantages and Disadvantages of Local Suppliers
PG 30 Breakfast Cereals			

Total Imports	US\$ 1,323	1. Netherlands 31.5 2. France 23.1 3. Germany 19.8 14. U.S. 0.5	Distance, availability and regional products	Developed processed food industry
PG 31 Snack Foods				
Total Imports	US\$ 166	1. France 34.9 2. Germany 24.1 3. U.K. 13.6 11. U.S. 0.5	Distance, availability and regional products	Developed confectionary industry
HS 02: Meat and Edible Meat Offal				
Total Imports	US\$ 1,814	1. Netherlands 25.1 2. France 21.1 3. Germany 9.5 19. U.S. 0.8	1,2: distance and availability 3: excellent price/quality ratio	Good domestic availability of beef
HS 03: Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates				
Total Imports	US\$ 1,789	1. Netherlands 22.5 2. France 9.3 3. Bangladesh 6.6 16. U.S. 3.0	1,2: European traders of seafood; 3: aquaculture supplier	tradition in seafood trading; good geographical location
HS 04: Dairy Produce; Birds' Eggs; Natural Honey				
Total Imports	US\$ 4,111	1. Netherlands 33.3 2. France 28.2 3. Germany 17.9 12. U.S. 0.4	1,2,3: Proximity	Long tradition of producing milk and milk based processed products
HS 07: Edible Vegetables And Certain Roots And Tubers				
Total Imports	US\$ 1,822	1. Netherlands 35.7 2. France 25.5 3. Spain 11.1 16. U.S. 0.6	1,2: proximity; 3: different climate/varieties	Growing and innovative horticultural industry in Flanders
HS 08: Edible Fruit And Nuts; Peel Of Citrus Fruit Or Melons				
Total Imports	US\$ 3,718	1. Colombia 17.7 2. Costa Rica 10.7 3. Ecuador 10.0 5. U.S. 3.5	1,2,3: different climate/supply season/tastes/varieties	A mature industry (especially apples and pears)
HS 09: Coffee, Tea, Mate And Spices				
Total Imports	US\$ 1,810	1. Brazil 22.2 2. Honduras 10.1 3. Peru 9.2 42. U.S. 0.1	Availability	No domestic availability
HS 16: Edible Preparations of Meat, Fish, Crustaceans, Molluscs or other Aquatic Invertebrates				
Total Imports	US\$ 1,141	1. Netherlands 28.8 2. France 21.0 3. Germany 18.7 27. U.S. 0.3	Proximity and re-export	Not (sufficiently) domestically available
HS 19: Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares				

Total Imports	US\$ 1,789	1. France 37.4 2. Netherlands 20.2 3. Germany 17.4 11. U.S. 1.0	Proximity and re-export	Not (sufficiently) domestically available
HS 20: Preparations Of Vegetables, Fruit, Nuts, Or Other Parts Of Plants				
Total Imports	US\$ 2,091	1. Brazil 24.5 2. France 17.5 3. Netherlands 15.9 5. U.S. 5.3	1: price / quality ratio	Not (sufficiently) domestically available
HS 21: Miscellaneous Edible Preparations				
Total Imports	US\$ 1,239	1. Netherlands 28.9 2. France 25.1 3. Germany 18.1 5. U.S. 4.2	Proximity, availability and re-export	Not (sufficiently) domestically available
HS 22: Beverages, Spirits, Wine and Vinegar				
Total Imports	US\$ 3,024	1. France 49.2 2. Germany 11.9 3. Netherlands 9.1 11. U.S. 0.9	1,3: Excellent regional products	Not (sufficiently) domestically available

Source: [www.gtis.com](http://www.gtis.com)

## SECTION IV. BEST PRODUCT PROSPECTS

### A. Products Present In The Market That Have Good Sales Potential

- Peanuts and tree nuts (almonds, walnuts, pistachios, pecan and hazelnuts)
- Fruit juices (orange and grapefruit)
- Processed fruit and vegetables
- Beverages
- (Super) Fruits containing high levels of antioxidants like cranberries, pomegranates, berries, etc.
- Wines
- Dried fruits (dates, figs, cranberries, raisins)

### B. Products Not Present In Significant Quantities But Which Have Good Sales Potential

- Functional/health foods
- Organic products
- High Value beef cuts and hamburgers (only Non-Hormone Treated Cattle)
- Innovative sauces, condiments and confectionary products

### C. Products Not Present Because They Face Significant Barriers

- Poultry (sanitary procedures)
- Processed food with GMO ingredients, bleached flour etc.

The EU uses the Combined Nomenclature (CN) for the customs classification of goods. The CN eight digit code numbers are based on the Harmonized System (HS) nomenclature: the first six digits refer to the HS headings, the two following digits represent the CN subheadings. The EU's on-line customs database can be consulted to look up commodity codes and relevant import duties:

[http://ec.europa.eu/taxation\\_customs/dds2/taric/taric\\_consultation.jsp?Lang=en&redirectionDate=20101215](http://ec.europa.eu/taxation_customs/dds2/taric/taric_consultation.jsp?Lang=en&redirectionDate=20101215). The EU's 2012 Tariff Schedule was published on October 28, 2011 in Official Journal L 282.

It is also possible to obtain Binding Tariff Information (BTI) from the MS's customs authority to get the proper product classification. Through this system, traders know in advance the tariff classification of the goods they intend to import. BTI is legally binding in all the member states. Information on how to obtain a BTI can be downloaded from the European Commission's Taxation & Custom's website at [http://ec.europa.eu/taxation\\_customs/customs/customs\\_duties/tariff\\_aspects/classification\\_goods/index\\_en.htm](http://ec.europa.eu/taxation_customs/customs/customs_duties/tariff_aspects/classification_goods/index_en.htm).

More information on the Netherlands' customs authorities can be found at [http://www.belastingdienst.nl/wps/wcm/connect/bldcontentnl/belastingdienst/douane\\_voor\\_bedrijven/index.html](http://www.belastingdienst.nl/wps/wcm/connect/bldcontentnl/belastingdienst/douane_voor_bedrijven/index.html). Customs authorities designated for the purpose of receiving applications and issuing binding tariff information: Belastingdienst Douane Regio Rotterdam Rijnmond Team Bindende Tariefinlichtingen Postbus 3070 6401 DN Heerlen, the Netherlands

More information on Belgium's customs authorities can be found at <http://fiscus.fgov.be/interfdan/>. Customs authorities designated for the purpose of receiving applications and issuing Binding Tariff Information: Centrale administratie der douane en accijnzen Dienst Nomenclatuur (Tarief), Landbouw en Waarde Cel BTI North Galaxy — Gebouw A — 8ste verdieping Koning Albert II-laan 33 1030 Brussel, Belgium

## SECTION V. POST CONTACT AND FURTHER INFORMATION

United States Department of Agriculture Foreign Agricultural Service  
U.S. Embassy  
Lange Voorhout 102, 2514 EJ The Hague, The Netherlands  
Phone: +31 (0)70 3102.305  
Fax: +31 (0)70 365.7681  
E-mail: [agthehague@fas.usda.gov](mailto:agthehague@fas.usda.gov)

Further information on the Benelux retail market is available from:

### Netherlands:

CBL  
PO Box 262  
2260 AG Leidschendam, the Netherlands  
Phone: +31 70 3376200  
Fax: +31 70 3176887  
[www.cbl.nl](http://www.cbl.nl)

### Belgium:

COMEOS  
Edmond van Nieuwehuyselaan 8  
1160 Brussels, Belgium  
Phone: +32 2 7880500  
Fax: +32 2 7880501  
[www.comeos.be](http://www.comeos.be)  
[info@comeos.be](mailto:info@comeos.be)

Table 20: Reports from FAS/The Hague

Country:	Title:	Report Number:
Belgium	FAIRS Report	BE2002
Netherlands	FAIRS Report	NL2005

---

Benelux	Processing Ingredients Report	NL1026
Benelux	Exporter Guide	NL1008
Benelux	HRI report	NL9002

---

The GAIN Reports can be downloaded from the following FAS website:  
<http://www.fas.usda.gov/scriptsw/attacherep/default.asp>