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Netherlands

Retail Foods

The Dutch Food Retail Market

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Report Highlights:

The turnover of the Dutch food retail industry in 2014 totaled € 33.3 billion. For 2015, turnover is expected to increase by 2.5 percent. The retail market is fairly consolidated with a market share of almost 60 percent for the top 3 food retailers. Sustainable food (including organic products) is one of the most important growth markets in food retail. The market share for private label products and also for convenient, healthy and innovative products continues to be strong.

SECTION I. MARKET SUMMARY

Dutch 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 homes. The remaining 20 percent includes mainly convenience stores (near office buildings, city center, motorways and train/metro stations), some wholesalers and just a few superstores (conveniently located alongside highways in shopping malls and industrial parks).



Top 3 food retailer formulas in the Netherlands, Albert Heijn, Jumbo, and Lidl, have a market share of 58 percent. The market of German discounters Aldi and Lidl combined has increased to 17.3 percent. Dutch discounters like Dirk and Dekamarkt (the former Bas van der Heijden, Dirk van den Heijden and Digros) have a market share of 3.8 percent.

Independent food retail stores are increasingly leaving the scene. Shrinking margins and on-going consolidation in the retail market drive this trend.

Table 1: Market Shares of Leading Food Retailers	
Company:	Market share, percentage:
Albert Heijn	34.1
Jumbo	14.0
Lidl	9.7
Aldi	7.4
Plus	5.9
C1000	5.8
Coop Supermarkten	2.9
Deen	2.1
Hoogvliet	2.1
Dekamarkt	1.9
Dirk	1.9
Spar	1.6
Nettorama	1.4
Jan Linders	1.0
Poiesz	1.0
Other	7.2
Total	100.0

Source: Distrifood Retailplanner 2015/2016

In 2014, the turnover of the Dutch food retail industry totaled € 33.3 billion, similar to the turnover in 2013. For 2015, turnover is expected to increase by 2.5 percent due to the improving economy in the Netherlands and greater confidence in the economy among consumers.

Table 2: Turnover Dutch food retail, billion Euros

2011	2012	2013	2014	2015*
32.2	32.6	33.3	33.3	34.1

Source: www.gfk.nl

* FAS/The Hague forecast

Trade In Food Products

The Dutch food market depends heavily on both imports and exports. Last year, the Netherlands imported USD 31.7 billion of consumer-oriented products, about a third came from neighboring Germany and Belgium. After Brazil, the U.S. is the second largest non-EU supplier of consumer-oriented products. Over 2014, U.S. exports totaled USD 1.1 billion, dominated by food preparations, tree nuts, wine and beef. U.S. exports of consumer-oriented products grew by almost 60 percent over the last 5 years.

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

	2010	2011	2012	2013	2014
Netherlands:					
Consumer Oriented Products					
Total imports:	26,462	29,298	29,576	31,292	31,709
Imports from U.S.:	735	840	844	976	1,111
Fishery Products					
Total imports:	2,654	3,055	3,023	3,067	3,470
Imports from U.S.:	88	98	95	104	121

Source: www.gtis.com

For fishery products the Dutch market also depends on imports. Last year, the Netherlands imported USD 3.5 billion of fishery products. Iceland is the largest supplier; the U.S. is the 9th largest non-EU supplier of fishery products. Over 2014, U.S. fish exports totaled 121 million, dominated by frozen fish fillets for further processing, cod, 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):
Convenience Stores	700*	<500
Supermarkets	3,624	500 – 1,500
Superstores	99	1,500 – 5,000
Wholesalers	100*	>5,000

Source: DistriFood Retailplanner 2015/2016

*FAS/The Hague estimate

Demand for Sustainable Food Products Is Up

During the last decade, Dutch food retailers have increasingly sourced food products which are either produced sustainably or obtained in a sustainable manner. The Dutch government published annually a report, “Monitor Duurzaam Voedsel”, 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 in 2013 by totaled almost USD 2.5 billion. The “Monitor Duurzaam Voedsel 2015”, detailing the 2014 figures, will be published in September this year. For more information go to www.monitorduurzaamvoedsel.nl.

Private Label Products

The market share for private label products continues to increase in most European markets. The largest market shares are to be found in the Western European countries, led by Spain (51 percent), the U.K. (45 percent) and Portugal (45 percent). Belgium and the Netherlands had a market share of 41 percent and 29 percent, respectively. Market shares in the Nordic region and most of the Central and Eastern European countries are between 30 percent and 35 percent.

The market share of private label is high in retail markets that are highly consolidated and innovative. Several retailers in the Netherlands market have developed two private labels; one focusing on price whereas the other is aiming at adding value. Consumers are discovering the good value for money that private label brands are offering; they can be a good alternative for A-branded products.

Private label seems to fare well not only in years of recession but also in more prosperous times. The profitability of private label products has fueled 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 boost the growing market for private label products as well.

The largest trade show for the Private Label industry takes place in Amsterdam, the Netherlands. Every year around 15 U.S. companies exhibit at the Amsterdam PLMA fair which is scheduled for 2016 on May 24 and 25. In 2015, SUSTA had a pavilion featuring 6 companies. Please contact our office in The Hague, the Netherlands for more information about the show and to check if your commodity cooperator or State Regional Trade Group is planning on participating at pinckaersm@state.gov or +31 70 3102 305.

On-Line Shopping Offers Potential:

The market for shopping on-line as a percentage of the total food retail is still small at the moment (an estimated 1 percent) but expected to grow. According to industry contacts, it is this part of the market which offers 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 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 more DeKa drives within the next few years. 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 five years.

Blurring Boundaries:

Especially in the cities, consumers are shopping at different times and locations. Breakfast is often bought on the way to work. During lunch breaks, people decide what they like to eat for lunch and buy it on the spot. Dinner is increasingly bought on the way to home. As a result innovative convenience stores, either small independent or part of a larger chain, are opened near metro/train stations, schools, office buildings and shopping malls. The traditional neighborhood grocery stores are, in order to survive, offering more and more meal components and ready-to-eat meals. Consumers request regional cuisine products (Asian, Italian, Tex-Mex, etc.) and overall tasty and fresh food. These new convenience stores are in fact not so much competing with traditional supermarkets but more so with foodservice outlets like La Place, Kentucky Fried Chicken, HEMA, Starbucks, Kiosk, McDonalds, 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: healthy food snacks (the 'free from, low on and rich in' products), nuts (pistachios, almonds, walnuts, etc.), so-called super fruits (cranberries, pomegranates, other berries), seafood products

(salmon, halibut, etc.) and legumes (beans and lentils). 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. Bloggers and Vloggers are rapidly gaining power in influencing consumers. Food processors and retailers play a crucial role as well, as they develop and market food products to create, anticipate and meet consumers' needs.

The Market For Organic Food Continues To Grow

The Partnership on Organics between the EU and U.S. offers export opportunities for U.S. organic products. The report 'Export opportunities for U.S. organics in the EU' provides information on the organic market in the EU and opportunities for U.S. products. More information can be found in GAIN NL 5003 or 'Export opportunities for U.S. organics in the EU market'.

Table 5: Advantages and Challenges of the Dutch Food Retail Market

<u>Advantages</u>	<u>Challenges</u>
<i>Sector Strengths & Market Opportunities:</i>	<i>Sector Weaknesses and Competitive Threats:</i>
Turnover figures indicate that the Dutch retail market is solid and strong. It was not affected by the economic crisis.	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 Dutch retail market; margins continue to be under pressure.
The largest sea port of Europe (Rotterdam) is located in the Netherlands; it furthermore has an excellent infrastructure.	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 spent on creating brand awareness hamper the introduction of new U.S. brands.
The Netherlands is a trading hub where importers make purchasing decisions valued at hundreds of millions of USD for Consumer-Oriented products that are transhipped to other European countries.	Sustainable food (including organic food) is one of the most important growth markets.

Source: FAS/The Hague

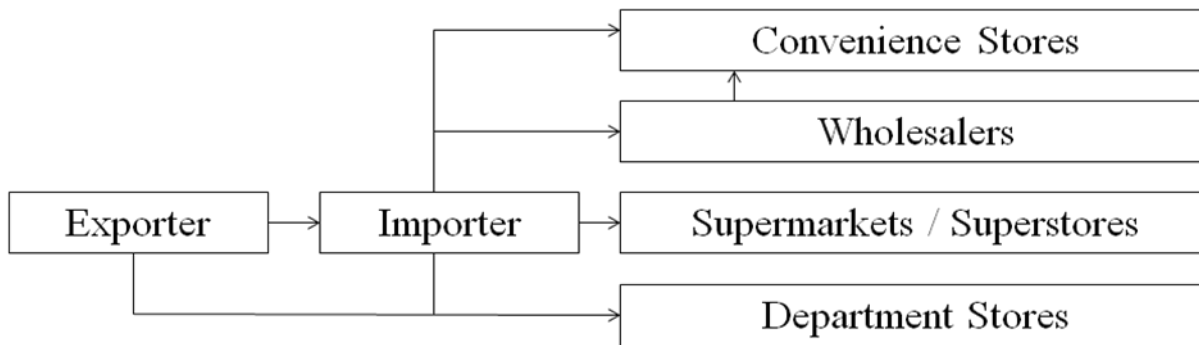
SECTION II. ROAD MAP FOR MARKET ENTRY

U.S. exporters seeking to enter the Dutch 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 Dutch market.

Entry Strategy

Success in introducing your product in the Dutch market depends mainly on knowledge of the market and building personal contact with knowledgeable and established importers. An importer knows the market, the trade barriers and the required documentation. Prior to any export, invest in research that analyzes the Dutch 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 Dutch market. The EU also has several FTAs which may advantage other 3rd country competitors. The Office of Agricultural Affairs (OAA) offers guidelines on business practices and import regulations. The OAA also maintains lists of Dutch 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, condiments, 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 sometimes 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, wines 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 a few specialized importers who are responsible for selecting products and filling those shelves.

As described in Section I, the Dutch retail industry 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.

Table 6: Leading Buying Groups in The Netherlands

Purchase Group:	Market Share, percentage:	Company name:
Albert Heijn Provincialeweg 11 1506 MA Zaandam www.ah.nl	34.1	Albert Heijn, AH XL, Albert.nl, AH To Go
Superunie Industrieweg 22B 4153 BW Beesd www.superunie.nl	29.1	Boni-Markten, Boon Beheer, Coop Holding, Deen Supermarkten, Detailresult Groep, Hoogvliet Super, Jan Linders, Nettorama Distributie, Poiesz Supermarkt, Sligro Food Group, Spar Holding, Plus Holding, Vomar Holding
Jumbo Groep Holding Rijksweg 15	19.8	C1000, Jumbo

Veghel, 5462 CE
The Netherlands
www.jumbo.com

Lidl
Huizermaatweg 45
1273 NA Huizen
www.lidl.nl

9.7 Lidl

Aldi Holding
Pascalweg 21
4104 BE
Culemborg
www.aldi.com

7.4 Aldi

Source: Distrifood Retailplanner 2015/2016

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

Table 7: Supermarkets and Super Stores (in alphabetic order)

Name	Format	Stores	Ownership	Locations
Albert Heijn	Supermarket	850	Royal Ahold	Nation wide
Aldi	Supermarket	496	Aldi	Nation wide
Amazing Oriental	Supermarket	17	Oriental Holding	Nation wide
Boni	Supermarket	43	Boni Supermarkten	Regional
C1000	Supermarket	63	Jumbo	Nation wide
Coop	Supermarket	183	Coop Cooperative	Nation wide
Deen	Supermarket	70	Deen	Regional
DekaMarkt	Supermarket	83	Detailresult Groep	Regional
Dirk	Supermarket	106	Detailresult Groep	Nation wide
EkoPlaza	Supermarket	71	Udea	Nation wide
Emté	Supermarket	130	Sligro Food Group	Nation wide
Hoogvliet	Supermarket	65	Hoogvliet	Regional
Jan Linders	Supermarket	58	Jan Linders	Regional
Jumbo	Supermarket	540	Jumbo	Nation wide
Lidl	Supermarket	400	Lidl	Nation wide
Marqt	Supermarket	13	Quirijn Bollen	Regional
MCD	Supermarket	40	Boon Beheer	Regional
Natudis	Supermarket	28	Natudis	Nation wide
Nettorama	Supermarket	31	Nettorama	Nation wide
Poiesz	Supermarket	68	Poiesz Supermarkten	Regional
Plus	Supermarket	255	Sperwer Groep	Nation wide
Superrr	Supermarket	14	Support&Co	Nation wide
AH XL	Super Stores	35	Royal Ahold	Nation wide
Jumbo Foodmarkt	Super Stores	2	Jumbo	Regional
Vomar	Super Stores	62	Vomar	Regional

Supermarket - retail surface $\leq 1,500$ m²

Super Stores - retail surface $> 1,500$ m²

Department Stores

Table 8: Department Stores

Name	Stores	Ownership	Locations
Bijenkorf	7	Selfridges	Nation wide
HEMA	530	Lion Capital LLP	Nation wide
Marks & Spencer	2	Marks & Spencer	Regional
V&D	63	Sun European Partners	Nation wide

Discounters

Table 9: Discounters

Name	Stores	Ownership	Locations
Aldi	496	Aldi-Gruppe	Nation wide
Lidl	400	Lidl & Schwarz	Nation wide
Dekamarkt	83	Detailresult Groep	Nation wide
Dirk	106	Detailresult Groep	Nation wide

B. CONVENIENCE STORES, GAS MARTS, KIOSKS

Table 10: Convenience Stores

Name	Ownership	Locations
AH To Go	Royal Ahold	Regional
CoopCompact	Coop Cooperative	Nation wide
Recreatiemarkten	Van Tol Retail	Nation wide
Spar City Store	Spar Holding	Regional
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

Source: AC Nielson

Table 11: Gas Marts

Name	Ownership	Gas Company	Locations
On the Run/Snack & Shop	ExxonMobil	ESSO	Nation wide
Shell Station	Shell	Shell	Nation wide
GO shops – the fresh way	Chevron	Texaco	Nation wide
Café Bonjour	Total	Total	Nation wide
M&S	Marks & Spencer	BP	Regional
Wild Bean Café	British Petroleum	BP	Nation wide

Source: AC Nielson

Table 12: Wholesalers

Name	Ownership	Locations
Netherlands		
Hanos (incl. ISPC)	Royal Ahold	Nation wide
VHC - Horesca	Maxxam C.V.	Nation wide
De Kruidenier Foodservices	Kruidenier	Rotterdam
Makro	Metro Cash & Carry	Nation wide

Sligro (incl. VEN) De Kweker	Sligro Food Group De Kweker	Nation wide Amsterdam
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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 service 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 Netherlands an attractive export market.

The Netherlands 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 Netherlands however has a highly sophisticated processing industry. As a result, the Netherlands 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 & veggies and nuts and a full range of specialty food products have gained popularity over the years.

Table 13: Netherlands' U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented and Fish & Seafood Products, (U.S. exports), value in million USD, 2014

Product Category	Main Suppliers, in percentage	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
PG 30 Breakfast Cereals			
Total Imports USD 149 (USD 0.3)	1. Belgium 42 2. Germany 26 3. France 14 15. U.S. 0.2	1, 2 and 3 are close to market and offer different good quality products	Local suppliers don't offer specialty products
PG 31 Snack Foods			
Total Imports USD 1,738 (USD 33)	1. Belgium 32 2. Germany 27 3. France 10 11. U.S. 2	1, 2 and 3 are close to market and offer different good quality products	Developed confectionary industry
HS 02: Meat and Edible Meat Offal			

Total Imports	USD 6,000 (USD 112)	1. Germany 25 2. Belgium 13 3. Brazil 12 12. U.S. 2	1,2: distance and availability 3: price/quality ratio	For local producers beef is a side product since their focus is on dairy production.
HS 03: Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates				
Total Imports	USD 3,110 (USD 117)	1. Iceland 12 2. Germany 10 3. Belgium 8 9. U.S. 4	1: they offer seafood for the sophisticated food processing industry	Long tradition in seafood trading; Good geographical location
HS 04: Dairy Produce; Birds' Eggs; Natural Honey				
Total Imports	USD 4,560 (USD 22)	1. Germany 44 2. Belgium 15 3. France 10 14. U.S. 1	1,2 and 3: Proximity	Great tradition of producing milk and milk based processed products
HS 07: Edible Vegetables And Certain Roots And Tubers				
Total Imports	USD 2,702 (USD 61)	1. Spain 29 2. Belgium 16 3. Germany 13 15. U.S. 2	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	USD 6,779 (USD 361)	1. S. Africa 13 2. Spain 9 3. Chile 9 5. U.S. 5	1,2 and 3: different climate/supply season/taste/varieties	Products not (sufficiently) available on the local market
HS 09: Coffee, Tea, Mate And Spices				
Total Imports	USD 1,649 (USD 3)	1. Belgium 27 2. Germany 19 3. France 7 34. U.S. 0.1	1, 2: trading tradition	No domestic availability
HS 16: Edible Preparations of Meat, Fish, Crustaceans, Molluscs or other Aquatic Invertebrates				
Total Imports	USD 1,985 (USD 7)	1. Belgium 18 2. Brazil 14 3. Germany 13 25. U.S. 0.4	2: price/quality ratio	Not (sufficiently) domestically available
HS 19: Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares				
Total Imports	USD 2,114 (USD 21)	1. Belgium 29 2. Germany 27 3. France 10 13. U.S. 1	Proximity and re-export	Not (sufficiently) domestically available

HS 20: Preparations Of Vegetables, Fruit, Nuts, Or Other Parts Of Plants					
Total Imports	USD	1. Brazil	18	Price/quality ratio	Not (sufficiently) domestically available
	3,528	2. Germany	14		
	(USD	3. Belgium	14		
	156)	5. U.S.	4		
HS 21: Miscellaneous Edible Preparations					
Total Imports	USD	1. Germany	21	Proximity and re-export	Not (sufficiently) domestically available
	2,421	2. UK	14		
	(USD	3. Belgium	14		
	211)	4. U.S.	9		
HS 22: Beverages, Spirits, Wine and Vinegar					
Total Imports	USD	1. Germany	19	Excellent regional products	Not (sufficiently) domestically available
	4,207	2. France	18		
	(USD	3. Belgium	16		
	103)	8. U.S.	2		

Source: www.gtis.com

SECTION IV. BEST PRODUCT PROSPECTS

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

- Nuts (almonds, peanuts walnuts, pistachios, pecan and hazelnuts)
- Fruit juices (orange and grapefruit)
- Processed fruit and vegetables
- Non Alcoholic Beverages
- (Super) Fruits containing high levels of antioxidants like pomegranates, all berries, etc.
- Craft beers
- 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 import requirements and standards for above products can be found in GAIN Report FAIRS Report NL5011.

SECTION V. POST CONTACT AND FURTHER INFORMATION

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Further information on the Dutch retail market is available from:

Netherlands:

CBL
 PO Box 262
 2260 AG Leidschendam, the Netherlands
 Phone: +31 70 3376200
www.cbl.nl

The GAIN Reports can be downloaded from the following FAS website:

<http://www.fas.usda.gov/scripts/attacherep/default.asp>

Leading Importers of Specialty Foods in the Netherlands and Nordic region (in alphabetic order):

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