USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Netherlands

Exporter Guide

Annual report for the Benelux countries

Approved By:

Prepared By:

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Report Highlights:

The decline in exports of US agricultural, fish and forestry products to the Benelux countries was smaller than the decline to the EU as a total due to stable exports to Belgium over 2009.

Post:
The Hague

Author Defined:

Section 1. Market Overview

Marcoeconomic Situation and Trends

The Netherlands:

Because of the country's strategic location on the North Sea and the Rhine, trade and distribution are in the Dutch genes. The Port of Rotterdam is among the most important sea ports in the world. Amsterdam Schiphol Airport occupies a similar position in Europe. Their geographic location and function as international hubs in Europe are seen as a major advantage. The ports of Rotterdam and Amsterdam have outstanding infrastructure and logistics services. The Dutch are business people. The population is highly educated, internationally oriented and largely multilingual. This explains why the Netherlands has proved attractive for foreign companies.

In December 2009, the Netherlands Bureau for Economic Policy Analysis (CPB) estimated that Dutch GDP shrank by almost 4 percent in 2009 in comparison to 2 percent growth in 2008. In 2010 the economy will start to recover by 1.5 percent. The export of goods, an essential element of the Dutch economy, dropped less dramatically in 2009 than forecast (by 5 percent) and is expected to recover by 6 percent in 2010. Unemployment is expected to increase from 3.9 percent in 2008 to 5 percent in 2009 and 6.5 percent in 2010. At the same time inflation will remain low at 1.25 percent in 2009 and 1 percent in 2010.

Figure 1: Key Data Dutch Economy

	2006	2007	2008	2009*	2010**
Economic Growth %	3.3	3.5	2.0	-4.0	1.5
Inflation (HIPC) %	1.7	1.6	2.5	1.3	1.0
Unemployment %	5.5	4.5	3.9	5.0	6.5
GDP (billion)	€535	€569	€596	€574	€583

Source: Central Bureau of Statistics/Netherlands Bureau for Economic Policy Analysis

* FAS/The Hague estimate

** FAS/The Hague forecast

Belgium:

Economic growth in 2009 was negative (minus 1.5 percent) but is expected to be positive again in 2010 (plus 0.8 percent). Although inflation was nearly zero, the National Bank of Belgium has complained that declining food and energy prices in 2009 have been insufficiently translated into lower consumer prices. At 7.9 percent, Belgian unemployment is lower than that of the Eurozone (9.4 percent), but is expected to deteriorate further in 2010. Just like the Dutch, the Belgians spend around 15 percent of their total spending on food.

Figure 2: Key Data Belgian Economy

	2006	2007	2008	2009	2010*
Economic Growth %	3.0	2.8	1.0	-1.5	0.8
Inflation (CPI) %	2.3	1.8	4.5	-0.1	1.6
Unemployment %	8.3	7.5	7.0	7.9	8.7
GDP (billion)	€319	€320	€326	€321	€323

Source: www.nbb.be

* forecast

Benelux Importers Key in US Exports to the EU-27

Total US exports of agricultural, fish and forestry products declined by almost 15% in 2009 to USD 108 billion. Exports to the EU-27 declined by a quarter to USD 9.2 billion, 8.6% of total US exports. The main reason for this decline is the financial and economic crises the EU is currently experiencing.

The main focus of this report is on Consumer-Oriented and Fish products. The EU continues to be an important market as 9.4% of all US exported Consumer-Oriented products end up here. The importance of the EU for US seafood exports is even greater as a quarter was sold on the EU market in 2009. More detailed data are available at http://www.fas.usda.gov/gats/BicoReport.aspx?type=country.

Figure 3: US Exports Of Agricultural, Fish and Forestry Products, by Destination (in million USD)

2009	**World**	**EU-27**	**Benelux**
Bulk products	39,728	1,683	280
Intermediate products	19,207	2,066	494
Consumer Oriented products	**39,677**	**3,712**	**1,025**
Forest products	5,280	827	135
Fish and Seafood products	**3,737**	**916**	**166**
Total	107,628	9,204	2,101

Source: www.fas.usda.gov (BICO reports)

For the first time in many years, exports of US Consumer-Oriented products to the EU declined, and are back to 2006/2007 levels. Although tree nuts still is the largest product group by far, other important products include processed fruit & vegetables, wine & beer, and fresh fruit. Fish fillets (mainly Alaska pollack) and salmon are still the main selling fish products to the EU.

Figure 4: US Exports Of Consumer-Oriented Agricultural And Fish & Seafood Products to the EU-27 (in 1,000 USD)

US exports to the EU-27	CY **2005**	CY **2006**	CY **2007**	CY **2008**	CY **2009**
Consumer-Oriented Agricultural Total	3,505,047	3,606,857	3,837,377	4,357,912	3,712,042
Snack Foods (Excl Nuts)	85,174	83,686	103,086	117,558	104,981
Breakfast Cereals & Pancake Mix	10,791	9,113	11,903	15,517	17,450
Red Meats, Fresh/Chilled/Frozen	151,040	117,786	121,969	246,321	139,270
Red Meats, Prepared/Preserved	4,746	5,772	3,429	5,599	3,832
Poultry Meat	173,916	121,520	131,143	130,336	146,010
Dairy Products	44,890	84,946	152,350	144,880	68,134
Eggs & Products	43,200	44,668	73,374	70,054	76,308
Fresh Fruit	154,649	151,007	179,791	199,302	161,188
Fresh Vegetables	40,663	35,134	39,248	45,859	43,518
Processed Fruit & Vegetables	262,398	320,283	371,757	529,834	458,677
Fruit & Vegetable Juices	121,012	165,290	142,379	163,744	158,268
Tree Nuts	1,546,698	1,445,846	1,428,281	1,475,141	1,284,742
Wine & Beer	329,244	476,025	468,118	492,736	386,319
Nursery Products & Cut Flowers	83,584	83,872	109,597	102,166	90,731
Pet Foods (Dog & Cat Food)	86,548	84,297	99,358	91,485	54,386
Other Consumer-Oriented Products	366,494	377,611	401,594	527,381	518,226
Fish & Seafood Products, Edible Total	927,694	1,043,411	1,067,416	1,105,230	916,192
Salmon, Whole Or Eviscerated	68,396	80,319	106,078	110,372	83,210
Salmon, Canned	84,372	81,859	88,856	90,597	73,608
Crab & Crabmeat	1,475	2,124	3,436	5,073	11,169
Surimi (Fish Paste)	69,961	42,583	32,098	47,163	26,403
Roe & Urchin (Fish Eggs)	19,732	19,614	34,230	54,112	24,940
Other Edible Fish & Seafood	683,758	816,912	802,718	797,913	696,863

Source: www.fas.usda.gov (BICO reports)

The Benelux is an excellent market for US products, taking over a quarter of all Consumer-Oriented products and almost a fifth of all Fishery products imported into the EU.

Figure 5: US Exports Of Consumer-Oriented Agricultural And Fish & Seafood Products to the Benelux (in 1,000 USD)

US exports to Belgium/Netherlands/Luxembourg	CY **2005**	CY **2006**	CY **2007**	CY **2008**	CY **2009**
Consumer-Oriented Agricultural Total	861,107	913,467	950,101	1,092,531	1,025,397
Snack Foods (Excl Nuts)	12,581	11,527	21,662	18,201	19.791
Breakfast Cereals & Pancake Mix	1,553	1,419	2,570	3,832	4,474
Red Meats, Fresh/Chilled/Frozen	34,084	33,442	42,583	78,013	72,397
Red Meats, Prepared/Preserved	1,289	1,456	716	1,272	1,208
Poultry Meat	651	581	1,328	4,210	2,897
Dairy Products	10,374	28,752	72,351	57,105	24,999
Eggs & Products	3,876	7,663	14,133	7,937	7,133
Fresh Fruit	42,745	27,733	33,698	45,721	33,001
Fresh Vegetables	8,781	8,154	8,492	11,208	9,601
Processed Fruit & Vegetables	57,511	71,353	75,691	104,520	91,698
Fruit & Vegetable Juices	94,362	125,055	114,829	136,393	137,987
Tree Nuts	335,412	337,678	307,213	324,847	335,261
Wine & Beer	46,272	47,479	27,798	33,934	27,617
Nursery Products & Cut Flowers	64,175	67,024	85,476	79,308	70,297
Pet Foods (Dog & Cat Food)	26,812	33,240	25,614	21,863	25,160
Other Consumer-Oriented Products	120,630	110,909	115,945	164,167	161,877

Fish & Seafood Products, Edible Total	183,161	206,531	184,166	204,510	166,424
Salmon, Whole Or Eviscerated	11,158	10,916	11,199	12,849	9,566
Salmon, Canned	9,124	9,924	10,397	14,987	9,090
Crab & Crabmeat	341	1,469	920	2,124	7,092
Surimi (Fish Paste)	14,995	10,735	2,964	6,506	5,225
Roe & Urchin (Fish Eggs)	4,752	3,300	5,675	22,912	6,125
Other Edible Fish & Seafood	142,790	170,187	153,011	145,133	129,325

Source: www.fas.usda.gov (BICO reports)

Key Developments and the Impact on Consumer Buying Habits

The Benelux has almost 28 million inhabitants and is the most densely populated region in the EU, with 412 people per square kilometer. More than two-thirds of its slowly growing population lives in a 100 mile corridor stretching from Amsterdam to Brussels.

Over the past decades more and more women have entered the labor force. This has resulted in double-income households, where time has become scarce. In their spare time they want to focus on their family, friends and healthy lifestyle. It seems that daily cooking is not on that priority list unless it's part of socially spending time with family and friends.

The double income households are still willing to pay additional money for variety, taste, and health in food. As a result they are purchasing more meal components and ready-to-eat products, but this group is also experimenting more with ethnic cuisines.

Another development that drives changing consumer buying habits is the on-going trend towards smaller households. There are some 12 million households with an average size of 2.3 people. Single and two person households are growing and households of 4 or more persons declining. Not only does this trend demand smaller portions, industry contacts also claim that these consumers tend to buy more expensive, value-added products or meal components.

The Benelux population is graying as the 0-20 age group is declining and the 65+ age group is growing rapidly. It is worth noting that the 65+ age group has a relatively high purchasing power since, in general, they live in paid-off houses and benefit from a good pension.

Figure 6: Key Demographic Figures For The Benelux

	2005	2006	2007	2008	2009*
Population, in millions	26.7	26.8	27.4	27.6	27.8
Number of Households, in millions	11.5	11.7	11.9	12	12.1
Household Size	2.3	2.3	2.3	2.3	2.3

Source: CBS, Statbel

* FAS/The Hague estimate

Figure 7: Dutch Population By Age Group, In Percentage

Year	0 – 19	20 – 39	40 – 64	65 – 79	80+	Total Population
1963	38.1	26.4	26.1	7.9	1.5	11,889,962
1973	35.0	29.0	25.6	8.6	1.8	13,387,623
1983	29.7	32.6	26.0	9.4	2.4	14,339,551
1993	24.6	32.9	29.5	10.0	3.0	15,239,182
2003	24.5	28.6	33.2	10.4	3.4	16,192,572
2009*	23.9	25.7	35.5	11.2	3.8	16,486,587

Source: CBS, * CBS estimate

Figure 8: Main Non-Dutch Population, By Ethnicity

	2005	2006	2007	2008	2009*
Indonesian	396,080	393,057	389,940	387,124	384,497
Turkish	358,846	364,333	368,600	372,852	378,330
Surinamese	329,430	331,890	333,504	335,679	338,678
Moroccan	315,821	323,239	329,493	335,208	341,528
Netherlands Antilles & Aruba	130,538	129,683	129,965	131,387	134,774

Source: CBS, * CBS estimate

Figure 9: Advantages And Challenges US Products Face In The Benelux

Advantages	**Challenges**
• Affluent and open-minded consumers • Highly developed infrastructure, trade history and mentality • Strong interest in buying new and innovative products and/or concepts • Favorable image of American products	• Saturated markets • Transportation is costsly and takes time • Competition from local companies • Tariffs and Non-Tariff trade barriers • Highly consolidated retail industry • Current economic condition

Source: FAS/The Hague

Figure 10: Consumer Trends

Consumers' needs and preferences:	
Health:	natural ingredients, lower calories, low or no sugar, healthy meals
Convenience:	fresh pre-packed food components, take-away, fresh ready-to-eat meals
Price:	discount, special offers, will only accept higher prices as long as they can be justified
Food Safety:	more information, more guarantees
Stores:	there is a need for the more traditional store that offers a wide assortment of products, fresh, specialty and luxury products, personalized service, etc. while on the other hand there is a need for discounters, stores that focus on price.

Source: FAS/The Hague

Changing Tastes

The non-Dutch population in the Netherlands (20%) has grown by 5 percent during the past 2 years, whereas the population with Dutch ethnicity grew during the same period by only 1

percent. As a result there has been strong growth in the number of stores serving ethnic niche markets and in demand for non-traditional Dutch food. The non-Belgian population in Belgium is much smaller and accounts for only 7%. More information on this subject can be found on http://www.fas.usda.gov/scriptsw/attacherep/default.asp
GAIN NL 7021.

Organic Food
Recent figures show that although consumers are increasingly buying organic products (mainly bread and dairy products), the organic industry still remains a niche industry and has only 1.8 percent market share in the Benelux. More information on the Benelux market for organic products can be found
on http://www.fas.usda.gov/scriptsw/attacherep/default.asp
GAIN NL 6024.

Awareness of Health and Well-Being
Consumers are becoming more aware of and concerned about the effects food has on their health and well-being. One driver is that there has been a trend to a more healthful lifestyle in Western countries. The following US industries have all benefitted from this trend: nuts (pistachios, almonds, walnuts, etc.), fruits (cranberries, pomegranates, berries, etc.), seafood (salmon, halibut, etc.). Another driver is that consumers are more cautious about foodborne illnesses. 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.

Section 2. Exporter Business Tips

Local Business Customs
Following are some characteristics of doing business in the Netherlands, Belgium or Luxembourg:

- Most business people speak English and have a high level of education (Masters or Bachelors degree).

- Generally speaking, they are straightforward and business-minded. They want to be well informed about the product/service and their business partner before doing business. At the same time, they do not want to waste their time and can be quick decision makers.

- Due to the increasing power of retailers and to changing consumers' demands, food processors are increasingly looking for long-term partnerships rather than a one-off business transaction.

- In times of a weaker dollar, importers are especially looking for added value from the US. They are looking for healthy or unique products for their retail/foodservice customers.

Food Standards & Regulations and General Import & Inspection Procedures
A detailed report on import regulation standards and also on general import and inspection procedures can be found in GAIN Reports NL9020 and BE9004.

Section 3. Market Sector Structure And Trends

The Food Retail Market
The latest information available on the food retail market can be found in GAIN Report NL0002.

The Foodservice Market
The latest information available on the foodservice market can be found in GAIN Report NL9002 or
http://www.fas.usda.gov/gainfiles/200901/146327090.pdf.

The Food Processing Market
The latest information available on the food processing market can be found in GAIN Report NL8012 or
http://www.fas.usda.gov/gainfiles/200806/146294840.pdf.

Section 4. Best High-value Products Prospects

Figure 17: The Best High-Value Products Prospects, USD 1,000

Commodity	Benelux Imports 2009 [1]	Benelux Imports from US 2009 [2]	Key Constraints Over Market Development	Market Attractiveness for USA
Scallops / 030721	10,320	6,793 (66%)	price - lack of knowledge by customer	growing awareness and demand in the high-end HRI industry
Salmon prepared or preserved / 160411	30,972	11,299 (36%)	some competition from Canada	great image and growing demand
Milk and cream in solid form /	332,123	485 (0%)	competition from Germany, France and Poland	the Benelux has a big export-focused food processing industry

040210				
Food preparations / 210690	855,132	131,211 (15%)	competition from Germany and Switzerland	the Benelux has a big export-focused food processing industry
Almonds / 080212	123,120	74,823 (61%)	US represents 63% of total imports, some competition comes from Spain	growing demand from the food ingredients market
Pistachios / 080250	211,629	148,955 (70%)	competition from Iran	growing demand from the snack food and confectionary industry
Fruit and other edible parts of plants / 200899	217,768	27,912 (13%)	competition from Costa Rica, India and Ecuador	
Foliage / 060491	262,633	69,340 (26%)	depending on the developments in the cutflower industry, competition from Costa Rica, Guatemala, Israel, Mexico, etc.	Benelux dominates global trade in cut flowers and therefore the trade in foliage within the EU
Fresh fruit	6,080,554	46,109 (1%)	competition from South Africa, Chile, Spain, Brazil, etc.	Benelux is important in importing and distributing fresh fruit within the EU
Wine / 2204	2,140,102	25,140 (1%)	competition from France, Germany and New World Wine countries	per capita consumption of wine continues to grow in the Benelux

Source: World Trade Atlas

Section 5. Key Contacts and Further Information

U.S. Embassy

FAS/The Hague

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Website: www.usembassy.nl/fas.html

or www.fas.usda.gov

To obtain the appropriate commodity code for your product, you can contact the Dutch customs at +31 45 574 3031 or visit the following website

http://ec.europa.eu/taxation_customs/dds/en/tarhome.htm.
This website also provides tariff classification and rates.

It is also possible to obtain a written binding ruling called a Binding Tariff Information (BTI). This will provide assurances that you have the correct tariff classification for your product. More information on how to apply for BTI is available online at:
http://www.douane.nl/zakelijk/invoer/en/invoer-05.html

More information on EU import duties can be found on
http://useu.usmission.gov/agri/import.html.

Marketing
An overview of leading trade shows can be found in Appendix 2.

Reports
Related Reports from FAS/The Hague and other European offices can be found on
http://www.fas.usda.gov/scriptsw/attacherep/default.asp.
Below you will find a selection of the reports from FAS/The Hague.

Figure 18: FAS/The Hague reports

Report Number	Report Title	Date Released
NL5002/BE5001	Benelux Horticulture Report	01/2005
NL6009	Dutch Snack and Confectionary Market	03/2006
NL6024	Benelux Organic Market	07/2006
NL7002/BE7001	Benelux Tree Nuts Market	01/2007
NL7008	Benelux Beef Market	04/2007
NL7021	Dutch Specialty Foods	09/2007
NL8009	EU Seafood Marketing Report	04/2008
NL8012	Food Processing Industry	06/2008
NL9020/BE9004	FAIRS	09/2009
NL9015/BE9005	Export Certification Guide	10/2009
NL9035	Frozen Potato Report	12/2009
NL9002	HRI Foodservice Industry	01/2009
NL9009	Fishery Report	04/2009
NL0002	Food Retail Report	01/2010

For more information on exporting to the Benelux market and market development related questions, please contact Marcel Pinckaers
at marcel.pinckaers@usda.gov or +31 (0)70-3102 305.

Appendix 1. Leading Wholesalers/Distributors in the Benelux

(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
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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
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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

JAVA
Wingepark 10
B-3110 Rotselaar, Belgium
P: +32-(0)16 589 620
F: +32-(0)16 589 611
W: www.jave-coffee.be

De Kruidenier Foodservices Nederland
Sluisjesdijk 111
3087 AE Rotterdam
P: +31-(0)10-4950790
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E: info@kruidenier.nl
W: www.kruidenier.nl

De Kweker
Mr. P. Poelstra
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Jan van Gaalenstraat 4
1040 KH, Amsterdam, the Netherlands
P: +31-(0)20-6063606
F: +31-(0)20-6063600
E: info@kweker.nl
W: www.kweker.nl

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
W: www.makro.nl

Sligro
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5460 AA, Veghel, the Netherlands
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I: info@sligro.nl
W: www.sligro.nl

Source: FAS/The Hague

Appendix 2. Trade Shows

Food Shows Frequently Visited by Benelux Food Buyers		
Show	When	Show Details & Organizers
Tavola, Kortrijk, Belgium Regional food retail show	March 14 – 16, 2010	www.tavola-xpo.be
European Seafood Exhibition, Brussels, Belgium World's largest seafood show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	April 27 – 29, 2010	tel: +1-207-8425504 fax: +1-207-8425505 www.euroseafood.com
Interzoo, Nuremberg, Germany Petfood show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	May 13 - 16, 2010	www.interzoo.com
World of Private Label (PLMA) Amsterdam, The Netherlands Europe's largest private label show	May 18 – 19, 2010	tel: +31-(0)20-5753032 fax: +31-(0)20-5753093 www.plmainternational.com
Hortifair, Amsterdam, The Netherlands Horticultural show	October 12 – 15, 2010	tel: +31 (0)297-344033 fax: +31 (0)297-326850 www.hortifair.nl info@hortifair.nl
SIAL, Paris, France Europe's largest food & beverages show in 2010 **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	October 19 -23, 2010 Bi-Annual	tel: +33-(0)1-49685498 fax: +33-(0)1-49685632 www.sial.fr
Horeca Expo, Gent, Belgium Regional hotel, restaurant and catering show	November, 2010	tel: +32-(0)9-2419211 fax: +32-(0)9-2419475 email: horeca@flandersexpo.be www.horecaexpo.be
HORECAVA, Amsterdam, The Netherlands National hotel and restaurant show	January 10 – 13, 2011	tel: + 31-(0)20-5753032 fax: + 31-(0)20-5753093 www.horecava.nl
European Fine Food Fair, Maastricht, The Netherlands	January, 2011	tel: +31-(0)43-3838383 fax: +31-(0)43-383830

Regional high-end Hotel and restaurant show		www.efff.nl
ISM, Cologne, Germany International sweets show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	January 30 – February 2, 2011	www.ism-cologne.com
Fruit logistica, Berlin, Germany European fresh fruit and vegetable show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	February 9 – 11, 2011	www.fruitlogistica.com
BioFach, Nuremberg, Germany European organic show **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	February 16 - 19, 2011	www.biofach.de
Fresh Rotterdam, Rotterdam, The Netherlands Fruit & vegetable show	September, 2011 Bi-Annual	tel: +31-(0)10-2933300 fax: +31-(0)10-2933399 www.freshrotterdam.nl
Food Week, Utrecht, The Netherlands National food and beverage show	September 2011 Bi-Annual	tel: +31-(0)30-2952799 fax: +31-(0)30-2952814 www.foodweek.nl
ANUGA, Cologne, Germany. Europe's largest food & beverages show in 2011 **USDA Endorsed Show** Trade Show Office Contact: Sharon Cook tel: +1-202-7203425 Sharon.Cook@usda.gov	October 8 – 12, 2011 Bi-Annual	tel: +49-180-5204220 fax: +49-221-821991010 www.anuga.com

Source: FAS/The Hague

Appendix 3. An Overview Of The Leading Benelux Importers Of Specialty Foods Supplying Both Foodservice And Food Retail

(in alphabetic order)

American Food Service
Mr. G. Chin-A-Kwie
Gageldijk 1
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Bickery Food Group
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1200 AK, Hilversum, the Netherlands
P: +31-(0)35-6560244
F: +31-(0)35-6563824
E: joost.manassen@bickery.nl
W: www.bickery.nl

Engel Foreign Food
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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. O. Brokke
P.O. Box 19045
Saturnusstraat 43
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Source: FAS/The Hague

Table A. Key Trade & Demographic Information For The Netherlands & Belgium, 2009* Figures

The Netherlands

Agricultural, Fish and Forestry Imports From All Countries (USD Million) / U.S. Market Share (%)	43,826 / 3
Consumer Oriented Food Imports From All Countries (USD Million) / U.S. Market Share (%)	22,165 / 3
Fish and Seafood Imports From All Countries (USD Million) / U.S. Market Share (%)	2,315 / 4
Population (Million) / Annual Growth Rate (%)	16.6 / 0.5
Number of Major Metropolitan Areas	Amsterdam, Rotterdam, The Hague and Utrecht
Per Capita Gross Domestic Product (USD)	39,295
Unemployment Rate (%)	5.0

Source: World Trade Atlas

* figures include first 11 months of 2009

Belgium

Agricultural, Fish and Forestry Imports From All Countries (USD Million) / U.S. Market Share (%)	33,307 / 2
Consumer Oriented Food Imports From All Countries (USD Million) / U.S. Market Share (%)	18,078 / 1
Fish and Seafood Imports From All Countries (USD Million) / U.S. Market Share (%)	1,715 / 2
Total Population (Millions) / Annual Growth Rate (%)	10.7 / 0.3
Number of Major Metropolitan Areas	Brussels and Antwerp
Per Capita Gross Domestic Product (USD)	35,645
Unemployment Rate (%)	8.0

Source: World Trade Atlas

* figures include first 11 months of 2009

Exchange Rate

Year	USD	EURO
2001	1	1.12
2002	1	1.06
2003	1	0.88
2004	1	0.81
2005	1	0.80
2006	1	0.80
2007	1	0.73
2008	1	0.68

2009	1	0.72

Table B. Consumer-Oriented & Fish Products Imports

Netherlands Imports	Imports from the World			Imports from the US.			US Market Share		
	2007	**2008**	**2009***	**2007**	**2008**	**2009***	**2007**	**2008**	**2009**
	USD Million			USD Million			%		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	25,168	27,104	22,165	656	725	633	3	3	3
Snack Foods (Excl. Nuts)	1,414	1,450	1,215	10	9	8	1	1	1
Breakfast Cereals & Pancake Mix	101	125	108	0	0	0	0	0	0
Red Meats, Fresh/Chilled/Frozen	2,440	2,842	2,360	16	44	46	1	2	2
Red Meats, Prepared/Preserved	884	1,233	1,006	1	0	0	0	0	0
Poultry Meat	732	745	601	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	2,848	2,514	1,771	27	26	6	1	1	0
Cheese	731	880	667	6	14	0	1	2	0
Eggs & Products	170	223	196	7	7	4	4	3	2
Fresh Fruit	3,565	4,079	3,354	28	45	34	1	1	1
Fresh Vegetables	1,707	1,605	1,239	3	6	3	0	0	0
Processed Fruit & Vegetables	1,954	1,964	1,707	40	68	67	2	3	4
Fruit & Vegetable Juices	1,131	1,284	1,155	63	61	59	6	5	5
Tree Nuts	603	613	566	165	145	155	27	24	27
Wine & Beer	1,433	1,482	1,120	36	35	20	2	2	2
Nursery Products & Cut Flowers	1,624	1,854	1,447	65	64	45	4	3	3
Pet Foods (Dog & Cat Food)	249	259	239	9	6	1	4	2	0
Other Consumer-Oriented Products	3,580	3,952	3,408	179	194	179	5	5	5
FISH & SEAFOOD PRODUCTS	2,622	2,804	2,315	71	99	83	3	4	4
Salmon	85	88	80	14	16	14	16	19	18
Surimi	63	46	40	1	3	2	2	6	5
Crustaceans	470	616	584	1	2	1	0	0	0
Groundfish & Flatfish	1,247	1,215	1,028	32	51	45	3	4	4
Molluscs	109	109	80	16	19	15	15	17	19
Other Fishery Products	648	729	500	8	8	3	1	1	1
AGRICULTURAL PRODUCTS TOTAL	42,001	49,402	39,138	1,587	1,949	1,280	4	4	3
AGRICULTURAL, FISH & FORESTRY TOTAL	48,429	55,871	43,826	1,694	2,093	1,431	4	4	3

Source: World Trade Atlas

* figures include first 11 months of 2009

Belgium Imports	Imports from the World			Imports from the US.			US Market Share		
	2007	**2008**	**2009***	**2007**	**2008**	**2009***	**2007**	**2008**	**2009**
	USD Million			USD Million			%		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	20,008	22,537	18,078	271	320	249	1	1	1
Snack Foods (Excl. Nuts)	1,141	1,243	1,156	2	3	3	0	0	0
Breakfast Cereals & Pancake Mix	141	169	157	0	1	1	0	1	1
Red Meats, Fresh/Chilled/Frozen	980	1,177	946	9	12	9	1	1	1
Red Meats, Prepared/Preserved	720	809	667	0	0	0	0	0	0
Poultry Meat	372	417	358	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	2,257	2,222	1,566	8	12	4	0	1	0
Cheese	1,245	1,473	1,156	0	0	0	0	0	0
Eggs & Products	127	158	135	0	0	0	0	0	0
Fresh Fruit	3,148	3,765	2,876	35	35	16	1	1	1
Fresh Vegetables	1,137	1,165	960	0	0	0	0	0	0
Processed Fruit & Vegetables	1,524	1,805	1,470	20	25	22	1	1	1
Fruit & Vegetable Juices	979	1,044	908	15	13	21	2	1	2
Tree Nuts	315	372	294	85	118	89	27	32	30
Wine & Beer	1,642	1,850	1,281	4	7	3	0	0	0
Nursery Products & Cut Flowers	560	618	580	35	35	25	6	6	4
Pet Foods (Dog & Cat Food)	447	534	481	20	16	17	5	3	4
Other Consumer-Oriented Products	3,292	3,717	3,179	38	42	33	1	1	1
FISH & SEAFOOD PRODUCTS	2,093	2,236	1,715	33	30	30	2	1	2
Salmon	120	129	120	4	4	3	3	3	3
Surimi	10	11	12	0	0	0	0	0	0
Crustaceans	809	859	596	3	4	1	0	0	0
Groundfish & Flatfish	573	615	481	5	3	2	1	1	0
Molluscs	224	230	182	15	13	17	7	6	9
Other Fishery Products	356	392	322	5	5	4	2	1	1
AGRICULTURAL PRODUCTS TOTAL	30,945	37,118	29,170	626	634	432	2	2	1
AGRICULTURAL, FISH & FORESTRY TOTAL	36,483	42,671	33,307	699	706	518	2	2	2

Source: World Trade Atlas

* figures include first 11 months of 2009

Table C. Top 15 Suppliers Of Consumer Foods And Edible Fishery Products

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Netherlands Imports - Top 15 Ranking

USD 1,000	2007	2008	2009*
Germany	5,411,300	5,577,861	4,336,653
Belgium	3,619,036	3,813,742	3,278,705
France	1,975,657	2,010,130	1,447,736
Brazil	1,640,251	1,668,153	1,541,949
Spain	1,402,330	1,374,072	1,081,349
South Africa	794,552	909,393	742,191
UK	790,573	904,262	710,429
Italy	650,352	748,639	612,298
Chile	556,803	744,106	668,545
U.S.A.	655,566	725,032	633,540
Other	7,671,240	8,628,563	7,111,986
World	25,167,660	27,103,953	22,165,381

FISH & SEAFOOD PRODUCTS
Report: Netherlands Imports - Top 15 Ranking

USD 1,000	2007	2008	2009*
Iceland	435,645	406,764	343,567
Germany	327,687	309,521	276,367
Belgium	191,530	177,957	160,585
China	152,384	175,872	157,969
Denmark	155,836	148,358	91,731
Vietnam	135,447	142,695	109,299
Norway	115,300	137,508	122,531
Morocco	75,188	129,333	124,807
Ecuador	70,191	122,636	43,676
UK	143,474	119,956	77,218
U.S.A.	71,199	98,943	83,133
Other	702,670	833,985	725,092
World	2,621,551	2,803,528	2,315,975

Source: World Trade Atlas

* figures include first 11 months of 2009

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Belgium Imports - Top 15 Ranking

USD 1,000	2007	2008	2009*
France	5,021,317	5,694,429	4,347,295
Netherlands	4,486,297	4,013,684	4,136,705
Germany	2,566,755	2,781,765	2,202,368
Spain	832,044	949,309	808,015
Italy	757,698	884,962	729,756
Brazil	692,887	711,226	634,683
Colombia	364,137	709,401	581,908
Costa Rica	562,729	658,085	456,854
New Zealand	421,555	534,020	375,600
UK	537,488	532,643	429,344
Ecuador	373,280	380,695	319,840
U.S.A.	271,341	319,684	249,780
Other	3,120,949	4,367,522	2,806,009
World	20,008,477	22,537,425	18,078,157

FISH & SEAFOOD PRODUCTS
Report: Belgium Imports - Top 15 Ranking

USD 1,000	2007	2008	2009*
Netherlands	498,375	548,420	448,325
France	200,729	221,419	182,062
Bangladesh	119,964	134,973	76,336
Germany	119,058	134,186	104,477
China	89,902	106,546	62,573
Denmark	101,602	102,928	78,701
India	109,203	98,377	60,201
Vietnam	82,950	96,076	83,883
U.K.	80,225	83,230	59,478
Iceland	96,008	74,142	75,676
Indonesia	65,645	60,957	39,261
U.S.A.	32,819	29,617	30,249
Other	496,269	545,113	414,477
World	2,092,749	2,235,984	1,715,699

Source: World Trade Atlas

* figures include first 11 months of 2009

[1] projected figures, based on imports between jan-nov 2009

[2] projected figures, based on imports between jan-nov 2009