USDA Foreign Agricultural Service
GAIN Report
Global Agricultural Information Network

Required Report - public distribution

Date: 6/13/2011

GAIN Report Number: NL1008

Netherlands

Exporter Guide

Exporting to the Netherlands and Belgium

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Report Highlights:
This report provides information about food and agricultural export opportunities to Benelux countries (Belgium, Netherland, and Luxembourg).

Post:
The Hague

Section 1. Market Overview
Macroeconomic Situation and Trends
The Netherlands:
Because of the country's strategic location on the North Sea and the Rhine, trade and distribution are ingrained into Dutch culture and economy. 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.

In February 2011, the Netherlands Bureau for Economic Policy Analysis (CPB) forecast that Dutch GDP will grow by 1.75 percent in 2011, compared to 1.7 percent in 2010. In 2012 the economy is expected to continue fragile growth of 1.5 percent. The export of goods, an essential element of the Dutch economy, recovered rapidly from the recession with a growth of 12.7 percent in 2010, after a dramatic drop of 9.2 percent in 2009. However, the pace of recovery is expected to slow down to 7.25 percent in 2011 and 5.25 in 2012. Unemployment will gradually start to decrease from 4.5 percent in 2010 to 4.25 percent in 2011 and 4 percent in 2012. Inflation is expected to increase from 1.3 percent in 2010 to 2 percent in 2011 and 2012. Purchasing power has been impacted by the recent economic downturn and creeping inflation, declining from -0.4 percent in 2010 to an expected -0.75 percent in 2011 and 2012.

Figure 1: Key Data Dutch Economy

	2006	2007	2008	2009	2010	2011*
Economic Growth %	3.3	3.5	2.0	-4.0	1.7	1.8
Inflation (HIPC) %	1.7	1.6	2.5	1.3	1.3	2.0
Unemployment %	5.5	4.5	3.9	5.0	4.5	4.3
GDP (billion)	€535	€569	€596	€574	€584	€594

Source: Central Bureau of Statistics/Netherlands Bureau for Economic Policy Analysis
* ECON/FAS The Hague forecast

Belgium:
The National Bank of Belgium (NBB) stresses that Belgian unemployment figures have weathered the economic crisis somewhat better than most other EU member states. Belgian unemployment is currently at 8.4 percent, compared to 10 percent in the Eurozone. Economic growth in 2010 amounted to 2 percent, against 1.7 percent in the Eurozone. It was mainly driven by a 20 percent growth in exports and higher household consumption. Similar to the situation in the Netherlands, the Belgians spend around 15 percent of their total spending on food.

Figure 2: Key Data Belgian Economy

	2006	2007	2008	2009	2010	2011*
Economic Growth %	3.0	2.8	1.0	-1.5	2.0	1.9
Inflation (CPI) %	2.3	1.8	4.5	-0.1	2.2	2.1
Unemployment %	8.3	7.5	7.0	7.9	8.4	8.3
GDP (billion)	€319	€320	€326	€321	€327	€334

Source: www.nbb.be
* FAS The Hague forecast

Benelux Importers Key in US Exports to the EU-27

Total US exports of agricultural, fish and forestry products increased by 18% in 2010 to $127 billion. With almost $11 billion, exports to the EU-27 grew by 18% and accounted for almost 9 percent of total U.S. agricultural exports. US Exports seem to be on the road to recovery.

The main focus of this report is on Consumer-Oriented and Fish products. The EU continues to be an important market and 9% of all exported U.S. Consumer-Oriented products end up in this market. The importance of the EU for U.S. seafood exports is even greater: a quarter of U.S. seafood exports were sold on the EU market in 2010.

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

2010	World	EU-27	Benelux	% of EU
Bulk products	47,209	2,337	457	20%
Intermediate products	23,181	2,462	594	24%
Consumer Oriented products	45,419	4,095	1,166	28%
Forest products	6,853	956	123	13%
Fish and Seafood products	4,193	1,010	201	20%
Total	126,855	10,860	2,541	23%

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

After a decline in 2009, US exports of agricultural, fish and forestry products to the EU-27 are up by 15 percent in 2010. Although soybeans, tree nuts and fish products continue to be the largest product groups, fruit & vegetable juices, pulses, and fresh fruit are gaining market share. More details on these figures can be downloaded on http://www.fas.usda.gov/gats/BicoReport.aspx?type=country

The Benelux are (Belgium, the Netherlands and Luxembourg) within the EU-27 and are an excellent market for U.S. products. Benelux countries account for almost a quarter of all EU-27 imports of US agricultural, fish and forestry products.

Figure 4: US Exports Of Consumer-Oriented Agricultural And Fish & Seafood Products to the Benelux countries

				January - December	
				Cumulative To Date Values in Thousands of dollars	
	2006	2007	2008	2009	2010
Product	Value	Value	Value	Value	Value
Bulk Total	795,790	709,501	687,582	278,773	456,603
Wheat	8,545	76,472	15,340	10,035	35,137
Coarse Grains	72	37,721	91,184	109	83
Rice	12,265	5,364	4,333	10,171	4,353
Soybeans	542,740	370,747	315,583	54,931	81,590
Cotton	8,252	9,367	6,295	1,606	457
Tobacco	158,251	120,600	166,287	134,828	250,283
Pulses	5,825	5,652	12,945	3,319	7,451
Peanuts	32,956	33,003	31,064	36,294	26,456
Other Bulk Commodities	25,883	50,576	44,550	27,499	50,843
Intermediate Total	465,553	457,678	534,940	493,906	594,339
Wheat Flour	62	222	348	7,794	102
Soybean Meal	7,342	4,605	8,338	2,877	3,203
Soybean Oil	290	469	1,173	4,349	974
Vegetable Oils (Ex Soybea	77,958	87,095	101,252	79,970	148,728
Feeds & Fodders	61,990	61,240	56,767	30,387	36,051
Live Animals	8,448	6,974	10,638	23,053	11,561
Hides & Skins	7,562	10,566	11,594	7,164	9,803
Animal Fats	2,409	10,168	17,496	4,291	19,667
Planting Seeds	50,951	51,457	86,226	80,944	88,244
Sugar, Sweeteners, Bev Ba	12,874	12,387	14,050	45,030	40,145
Other Intermediate Produ	215,646	212,706	227,064	208,047	235,922
Consumer Oriented Total	913,467	950,101	1,091,795	1,084,925	1,165,688
Snack Foods	11,527	21,662	18,201	19,791	24,769
Breakfast Cereals	1,409	2,570	3,800	4,475	5,477
Red Meats, FR/CH/FR	33,443	42,583	77,381	72,666	99,166
Red Meats, Prep/Pres	1,457	716	1,258	1,208	962
Poultry Meat	581	1,328	4,134	2,895	3,884
Dairy Products	28,752	72,352	57,305	24,998	47,037
Eggs & Products	7,663	14,133	7,937	7,133	10,229
Fresh Fruit	27,733	33,699	45,702	33,001	31,665
Fresh Vegetables	8,154	8,491	11,208	9,566	9,903
Processed Fruit & Vegetab	71,353	75,691	104,520	91,698	96,409
Fruit & Vegetable Juices	125,055	114,829	136,251	137,989	170,386
Tree Nuts	337,679	307,213	325,142	334,560	369,133
Wine and Beer	47,479	27,798	33,873	27,630	33,307
Nursery Products	67,034	85,477	79,305	70,297	69,115
Pet Foods	33,240	25,605	21,863	25,160	21,939
Other Consumer Oriented	110,909	115,946	164,156	160,875	172,299
Forest Products	79,165	83,330	99,609	135,192	123,185
Logs and Chips	8,269	14,771	14,858	8,551	8,693
Hardwood Lumber	33,229	28,921	26,209	12,925	17,951
Softwood and Treated Lum	5,404	4,783	5,184	5,730	5,190
Panel Products (Incl Plywo	16,029	20,061	16,895	13,165	16,154
Other Value-Added Wood	16,193	14,795	36,464	94,821	75,197
Fish Products	206,531	184,167	204,084	166,205	200,706
Salmon Whole or Eviscerat	10,906	11,200	12,849	9,321	17,844
Salmon Canned	9,934	10,397	14,987	9,091	7,320
Crab & Meat	1,469	920	2,118	537	4,631
Surimi (Fish Paste)	10,735	2,964	6,506	5,225	10,622
Roe & Urchin (Fish Eggs)	3,300	5,675	22,901	6,125	8,981
Other Edible Fish & Seafoo	170,187	153,011	144,713	135,906	150,309
Agricultural Products	2,174,810	2,117,280	2,314,319	1,797,604	2,216,701
Ag, Fish & Forest Prods	2,460,506	2,384,776	2,608,003	2,099,001	2,540,593

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 130 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 who place a premium on time. Double income households are willing to pay for convenience, variety, 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 and new food concepts.

Another development driving changes in 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 four or more are declining. Not only does this trend demand smaller food 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 good pensions and retirement benefits.

Figure 5: Key Demographic Figures For The Benelux

	2006	2007	2008	2009	2010
Population, in millions	26.8	27.4	27.6	27.8	28.0
Number of Households, in millions	11.7	11.9	12	12.1	12.4
Household Size	2.3	2.3	2.3	2.3	2.25

Source: CBS, Statbel

Figure 6: 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
2010	23.7	25.3	35.7	11.4	3.9	16,574,989

Source: CBS

Figure 7: Main Non-Dutch Population, By Ethnicity

	2006	2007	2008	2009	2010
Indonesian	393,057	389,940	387,124	384,497	381,500*
Turkish	364,333	368,600	372,852	378,330	383,957
Surinamese	331,890	333,504	335,679	338,678	342,279
Moroccan	323,239	329,493	335,208	341,528	349,005
Former NLs Antilles & Aruba	129,683	129,965	131,387	134,774	138,420

Source: CBS, * FAS The Hague estimate

Figure 8: Advantages And Challenges US Products Face In The Benelux

Advantages	Challenges
• Affluent and open-minded consumers • Highly developed infrastructure • Trade history and mentality	• Saturated markets • Transatlantic transportation is costly and takes time

• Strong interest in experimenting with new and innovative products and/or concepts • Favorable image of American products	• Competition from local/regional supply • Tariffs and Non-Tariff trade barriers • Highly consolidated retail industry

Source: FAS/The Hague

Figure 9: 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 when 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%) annually grows by 2 percent whereas ethnic Dutch population growth is stagnate. 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 in GAIN NL7021 at http://www.fas.usda.gov/scriptsw/attacherep/default.asp.

Organic Food

Recent figures show that consumers are increasingly buying organic products (mainly bread and dairy products), the organic industry however is still a rather small industry with a market share in the Benelux of roughly 3 percent. More information on the Benelux market for organic products can be found in GAIN NL6024http://www.fas.usda.gov/scriptsw/attacherep/default.asp. Information on the EU market can be found in GAIN NL0022 or http://gain.fas.usda.gov/Recent%20GAIN%20Publications/EU-27%20Organic%20Products%20Market%20Report_The%20Hague_EU-27_8-17-2010.pdf.

Awareness of Health and Well-Being

Consumers are becoming more aware of and concerned about the effect food types have on their health and well-being. There is a clear trend to more healthful lifestyle in Western European 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.) and to some extent pulses. Another driver is that consumers are more cautious about food borne 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.

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 anybody's 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 NL1001 and BE1001.

Manufacturers (that are not eligible to export to the European Union) that want to send their products to the EU for e.g. exhibiting at a trade show or for research purposes can request an import waiver. Contact the VWA for obtaining the right documents and specific requirements:

Food and Consumer Product Safety Authority (nVWA)

Division PRIMEX	Tel.	+31 78 6112100
Department TVE Import	Fax	+31 78 6112141
Postbus 3000	E-mail:	import@vwa.nl
3330 DC Zwijndrecht		

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 or http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Retail%20Foods_The%20Hague_Netherlands_1-26-2010.pdf

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.

Private Label Products
Albeit slowly, the market for private label products continues to grow in Europe, the current market share is around 30-35%. Retailers are investing a lot in their own Retail Brands by focusing on adding value rather than competing on price. These Retail Brands are increasingly competing with the international A-brands. The big difference between an A-brand and a retail brand is that the latter is limited to this specific retailer. Other private label brands that focus on price are found in the lower end of the market. Research has shown that the buyers of private label products are indeed the larger households (4 or more persons). Frequent buyers are also the high educated and more affluent buyers. The Private Label Show that annually takes place in Amsterdam can offer good opportunities for U.S. companies that want to expand business overseas. There are great possibilities for U.S. suppliers of tree nuts, peanuts, pulses, rice, fruit (juices), seafood, and other food ingredients.

Section 4. Best High-value Products Prospects

Figure 10: Netherlands, The Best High-Value Products Prospects, USD 1,000

Commodity / code	Imports, 2010	Imports from US, 2010	Key Constraints Over Market Development	Market Attractiveness for USA
Bovine Cuts Boneless / 020130	559,072	56,880 (10%)	Competition from Argentina, Ireland and Brazil	Demand for good quality beef and willingness to pay a premium price
Vegetable seeds / 120991	300,545	46,088	Competition from France, China and Chile	Highly sophisticated, specialized and internationally operating horticultural industry
Grapefruit / 080540	187,081	34,178	Competition from China, South Africa and Spain	Demand for healthy products and good fresh produce
Non alcoholic beverages / 220290	317,582	30,864	Competition from Germany, Austria, the UK and Belgium	Demand for different and value added drinks
Walnuts / 080232	26,657	11,920	Competition from Chile and India	Demand for healthy products, US continues to be a steady and large supplier of walnuts
Berries / 081020	34,045	1,040	Competition from Mexico, Poland, Spain and Belgium	Demand for healthy products and good fresh produce
Cane molasses / 170310	42,711	10,964 (26%)	Competition from Pakistan and Mauritius	Sophisticated food processing industry
Sweet potatoes / 071420	18,545	7,486 (40%)	Competition from China, Egypt and South Africa	Demand for healthy products and good fresh produce
Sockeye Salmon / 030311	7,985	6,584 (82%)	There is no real competition	Demand for healthy products, Demand for seafood is up, Alaska seafood has great image
Frozen Orange juice / 200911	5,329	125 (2%)	Competition from most of Latin American countries	Demand for healthy products, demand for fruit (products) is good, US is a good supplier of citrus products
Sawdust and wood waste / 440130	186,295	51,006 (27%)	Competition from Canada and Germany	Demand for bio-fuels
Scallops / 030721	3,111	1,649 (53%)	price - lack of knowledge by customer	growing awareness and demand in the high-end HRI industry
Food preparations / 210690	638,034	112,277 (18%)	competition from Germany, Belgium and Switzerland	the Benelux has a big export-focused food processing industry
Almonds / 080212	91,300	66,382 (73%)	US represents 73% of total imports, some competition comes from Spain	Strong demand from food manufacturers, confectionary and snack industry
Pistachios / 080250	104,171	71,323 (68%)	competition from Iran	Strong demand from food manufacturers, confectionary and snack industry
Fruit and other edible parts of plants / 200899	210,469	33,725 (16%)	competition from India, Costa Rica and Ecuador	Demand for healthy products and good fresh produce
Foliage / 060491	222,466	43,618 (20%)	depending on the developments in the cut flower industry, competition from Costa Rica, Israel and Guatemala	Benelux dominates global trade in cut flowers and therefore the trade in foliage within the EU
Wine / 2204	1,019,401	8,999 (1%)	competition from France, Germany and New World Wine countries	per capita consumption of wine continues to grow in the Benelux, demand for new world wines grows

Source: World Trade Atlas

Figure 11: Belgium, The Best High-Value Products Prospects, USD 1,000

Commodity / code	Imports 2010	Imports from US 2010	Key Constraints Over Market Development	Market Attractiveness for USA
Walnuts / 080232	14,000	6,795 (51%)	Competition from France, Italy and Moldova	Demand for healthy products, US continues to be a steady and large supplier of

				walnuts
Orange juice / 200912	222,724	22,864 (10%)	Competition from most of Latin American countries	Demand for healthy products, demand for fruit (products) is good, US is a good supplier of citrus products
Scallops / 030729	49,274	22,325 (45%)	price - lack of knowledge by customer	growing awareness and demand in the high-end HRI industry
Nuts & Seeds / 200819	81,077	8,596 (11%)	Competition from Turkey, Italy and Spain	Strong demand from food manufacturers, confectionary and snack industry
Butter / 040510	382,301	5,683 (1%)	Competition from Netherlands, Ireland, France and Germany	Sophisticated food processing industry
Mixes & Doughs / 190120	95,395	4,064 (4%)	Competition from France, Netherlands and Germany	Demand for specialty and value added processed food products

Source: World Trade Atlas

Section 5. Key Contacts and Further Information

U.S. Embassy
FAS/The Hague
Marcel Pinckaers
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Phone: +31-70-310-2305
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E-mail: marcel.pinckaers@fas.usda.gov
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.

US Cooperators

An overview of US cooperators can be found at http://www.usaedc.org/about.cfm#members (click on "Click Here for a list of USAEDC Members"). Be aware that not all US cooperators have programs for the European market.

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 12: 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-27 Seafood Marketing Report	04/2008
NL8012	Food Processing Industry	06/2008
NL1001/BE1001	FAIRS Report	01/2011
NL0029/BE0003	Export Certification Guide	12/2010
NL0025	EU-27 Frozen Potato Report	10/2010
NL9002	HRI Foodservice Industry	01/2009
NL9009	Fishery Report	04/2009
NL0002	Food Retail Report	01/2010
NL0022	EU-27 Organic Market Report	09/2010

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

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, the Netherlands
P: +31-(0)10-4950790
F: +31-(0)10-4956696
E: info@kruidenier.nl
W: www.kruidenier.nl

De Kweker
Mr. Jan Boer
P.O. Box 59345
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. M. (Maarten) Van Hamburg
Mr. B. Eijssink
Diermervijver, Gebouw Vijverpoort, Dalsteindreef 101-139
1112 XC Diemen, the Netherlands
P: +31-(0)20-3980200
F: +31-(0)20-3980201
I: bas.eijssink@metro-mcc.nl
W: www.makro.nl

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

VHC – MAXXAM
P.O. Box 90
3340 AB Hedrik-Ido-Ambacht, the Netherlands
P: +31-(0)78-6833400
F: +31-(0)78-6833830
I: info@vhc.nl
W: www.vhc.nl
W: www.maxxam.nl

Source: FAS/The Hague

Appendix 2. Trade Shows

Trade Shows Frequently Visited by Benelux Food Buyers		
Show	When	Show Details & Organizers
Interzum, Cologne, Germany Regional tradeshow for wood products (furniture and interior) Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	May 25 – 28, 2011	Tel: +31-(0)10-2064850 www.koelnmesse.nl www.interzum.de
Food Week, Utrecht, The Netherlands National food and beverage show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	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** Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	October 8 – 12, 2011 Bi-Annual	tel: +49-180-5204220 fax: +49-221-821991010 www.anuga.com
Hortifair, Amsterdam, The Netherlands Horticultural show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	November 01 - 04, 2011	tel: +31 (0)297-344033 fax: +31 (0)297-326850 www.hortifair.nl info@hortifair.nl
Food Ingredients, Paris, France **USDA Endorsed Show** Contact: Laurent Journot Laurent.journot@fas.usda.gov	November 29 – December 01, 2011	
Horeca Expo, Gent, Belgium Regional hotel, restaurant and catering show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	November 20 - 24, 2011	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 Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	January 10 – 13, 2012	tel: + 31-(0)20-5753032 fax: + 31-(0)20-5753093 www.horecava.nl

Sirha, Lyon, France **USDA Endorsed Show** Contact: Laurent Journot Laurent.journot@fas.usda.gov	January 26 – 30, 2012	
ISM, Cologne, Germany International sweets show **USDA Endorsed Show** Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	January 29 – February 1, 2012	www.ism-cologne.com
European Fine Food Fair, Maastricht, The Netherlands Regional high-end Hotel and restaurant show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	January 30 – February 01, 2012	tel: +31-(0)43-3838383 fax: +31-(0)43-383830 www.efff.nl
Fruit logistica, Berlin, Germany European fresh fruit and vegetable show **USDA Endorsed Show** Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	February 8 – 10, 2012	www.fruitlogistica.com
BioFach, Nuremberg, Germany European organic show **USDA Endorsed Show** Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	February 15 - 18, 2012	www.biofach.de
Tavola, Kortrijk, Belgium Regional food retail show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	March 11 – 13, 2012	www.tavola-xpo.be
European Seafood Exhibition, Brussels, Belgium World's largest seafood show **USDA Endorsed Show** Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	April 24 – 26, 2012	tel: +1-207-8425504 fax: +1-207-8425505 www.euroseafood.com
Interzoo, Nuremberg, Germany Petfood show **USDA Endorsed Show** Trade Show Office Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	May 17 - 20, 2012	www.interzoo.com
World of Private Label (PLMA) Amsterdam, The Netherlands Europe's largest private label show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	May 24 – 25, 2012	tel: +31-(0)20-5753032 fax: +31-(0)20-5753093 www.plmainternational.com
SIAL, Paris, France Europe's largest food & beverages show in 2010 **USDA Endorsed Show** Contact: Laurent Journot Laurent.journot@fas.usda.gov	October 21 -25, 2012 Bi-Annual	tel: +33-(0)1-49685498 fax: +33-(0)1-49685632 www.sial.fr
Internationale BouwBeurs, Utrecht, The Netherlands National show for wood products (construction) Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	February 4 – 9, 2013	Tel: +31-(0)30-295 2731 www.bouwbeurs.nl

IFE London, the U.K. Contact: Julie Nichols julie.nicholson@fas.usda.gov	March 17 – 20, 2013	

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
3602 AG Maarssen, the Netherlands
P: +31-(0)30-2613604
F: +31-(0)30-2613624
E: g.chin@americanfood.nl
W: www.americanfood.nl

Bickery Food Group
Mr. J. Manassen
P.O. Box 433
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
Mr. W. Westerveld
Ondernemingsweg 264
1422 DZ, Uithoorn, the Netherlands
P: +31-(0)297-533833
F: +31-(0)297-531665
E: w.westerveld@effbv.nl
W: www.engelforeignfood.com

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

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

Pietercil Barends
Mr. D. van Bueren
Bleiswijkseweg 51
2280 AB, Zoetemeer, the Netherlands
P: +31-(0)79-3441148
F: +31-(0)79-3424549
E: danny.van.Bueren@pietercil.com
W: www.pietercil.com

Pietercil Delby's
Mr. P. Deschaepmeester
Vitseroelstraat 74
B-1740 Ternat, Belgium

Two Food
Mrs. L. van Eijden-Vellekoop
Steenhoffstraat 5
3764 BH Soest, the Netherlands

tel.: +32 2583 81 00
fax: +32 2582 29 63
E:philippe.de.schaepmeester@pietercil.com
W: www.pietercil.com

P: +31-(0)35-6090990
F: +31-(0)35-6090988
E: info@2food.nl
W: www.2food.nl

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

Wonderfood
Mr. M. Lazraq
Avenue de L'Artisanat, 6
4420 Braine-l'Alleud, Belgium
P: +32-(0)2-332-1320
F: +32-(0)2-403-0740
E: majid@wonderfood.eu
W: www.wonderfood.eu

Zenobia
Mr. P. Cosse
Rue du Grand Cortil 17
B-1300 Wavre, Belgium
P: +32-(0)10-222394
F: +32-(0)10-222394
E: info@zenobia.be
W: www.zenobia.be

Source: FAS/The Hague

Table A. Key Trade & Demographic Information For The Netherlands & Belgium

2010 Figures
The Netherlands:

Agricultural, Fish and Forestry Imports From All Countries (USD Million) / U.S. Market Share (%)	51,682 / 4
Consumer Oriented Food Imports From All Countries (USD Million) / U.S. Market Share (%)	25,364 / 3
Fish and Seafood Imports From All Countries (USD Million) / U.S. Market Share (%)	2,617 / 3
Population (Million) / Annual Growth Rate (%)	16.7 / almost 1
Number of Major Metropolitan Areas	Amsterdam, Rotterdam, The Hague and Utrecht
Per Capita Gross Domestic Product (USD)	46,627
Unemployment Rate (%)	4.5

Source: World Trade Atlas

Belgium:

Agricultural, Fish and Forestry Imports From All Countries (USD Million) / U.S. Market Share (%)	36,854 / 2
Consumer Oriented Food Imports From All Countries (USD Million) / U.S. Market	19,611 / 0

Share (%)	
Fish and Seafood Imports From All Countries (USD Million) / U.S. Market Share (%)	1,931 / 2
Total Population (Millions) / Annual Growth Rate (%)	10.7 / 0.5
Number of Major Metropolitan Areas	Brussels and Antwerp
Per Capita Gross Domestic Product (USD)	40,748
Unemployment Rate (%)	8.4

Source: World Trade Atlas

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
2010	1	0.75

Table B. Consumer-Oriented & Fish Products Imports

Netherlands Imports	Imports from the World			Imports from the US.			US Market Share		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
	USD Million			USD Million			%		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	28,800	25,690	25,364	732	704	729	3	3	3
Snack Foods (Excl. Nuts)	1,600	1,412	1,267	9	10	8	1	1	1
Breakfast Cereals & Pancake Mix	133	133	108	0	0	0	0	0	0
Red Meats, Fresh/Chilled/Frozen	2,961	2,726	2,724	44	54	69	1	2	3
Red Meats, Prepared/Preserved	1,280	1,155	1,117	0	0	0	0	0	0
Poultry Meat	855	708	674	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	2,634	2,058	2,189	27	7	11	1	0	1
Cheese	910	775	803	14	0	1	2	0	0
Eggs & Products	233	243	262	7	5	6	3	2	2
Fresh Fruit	4,379	3,807	4,014	46	41	49	1	1	1
Fresh Vegetables	1,711	1,525	1,686	6	4	4	0	0	0
Processed Fruit & Vegetables	2,154	1,984	1,893	69	73	79	3	4	4
Fruit & Vegetable Juices	1,630	1,346	1,402	64	65	61	4	5	4
Tree Nuts	620	634	653	145	173	182	23	27	28
Wine & Beer	1,525	1,404	1,228	35	22	10	2	2	1
Nursery Products & Cut Flowers	1,913	1,649	1,547	64	49	50	3	3	3

Pet Foods (Dog & Cat Food)	278	266	199	6	2	1	2	1	1
Other Consumer-Oriented Products	3,986	3,865	3,599	196	197	198	5	5	6
FISH & SEAFOOD PRODUCTS	2,843	2,646	2,617	98	92	88	3	3	3
Salmon	100	105	106	16	18	15	16	17	14
Surimi	1	0	0	0	0	0	0	0	0
Crustaceans	622	658	661	2	2	1	0	0	0
Groundfish & Flatfish	424	376	369	1	1	0	0	0	0
Molluscs	114	97	95	19	17	10	17	18	11
Other Fishery Products	1,582	1,410	1,386	60	54	61	4	4	4
AGRICULTURAL PRODUCTS TOTAL	52,620	44,991	46,159	1,967	1,423	1,805	4	3	4
AGRICULTURAL, FISH & FORESTRY TOTAL	59,511	50,510	51,682	2,119	1,592	1,979	4	3	4

Source: World Trade Atlas

Belgium Imports	Imports from the World			Imports from the US.			US Market Share		
	2008	2009	2010	2008	2009	2010	2008	2009	2010
	USD Million			USD Million			%		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	22,043	19,783	19,611	319	275	288	1	1	1
Snack Foods (Excl. Nuts)	1,234	1,176	1,145	3	4	4	0	0	0
Breakfast Cereals & Pancake Mix	167	171	143	1	2	1	1	1	1
Red Meats, Fresh/Chilled/Frozen	1,170	1,051	993	12	12	7	1	1	1
Red Meats, Prepared/Preserved	798	757	742	0	0	0	0	0	0
Poultry Meat	413	415	443	0	0	0	0	0	0
Dairy Products (Excl. Cheese)	2,193	1,741	2,094	12	6	11	1	0	1
Cheese	1,455	1,299	1,325	0	0	0	0	0	0
Eggs & Products	156	153	153	0	0	0	0	0	0
Fresh Fruit	3,754	3,134	2,926	35	18	10	1	1	0
Fresh Vegetables	1,154	1,071	1,134	0	0	0	0	0	0
Processed Fruit & Vegetables	1,787	1,615	1,627	25	24	31	1	2	2
Fruit & Vegetable Juices	1,023	986	822	13	23	39	1	2	5
Tree Nuts	372	323	297	118	99	82	32	31	28
Wine & Beer	1,832	1,459	1,375	7	4	6	0	0	0
Nursery Products & Cut Flowers	613	649	670	35	27	29	6	4	4
Pet Foods (Dog & Cat Food)	543	534	464	16	20	18	3	4	4
Other Consumer-Oriented Products	3,379	3,248	3,256	42	36	49	1	1	1
FISH & SEAFOOD PRODUCTS	2,197	1,875	1,931	27	32	38	1	2	2
Salmon	128	138	152	5	4	6	4	3	4

Surimi	0	0	0	0	0	0	0	0	0
Crustaceans	858	668	709	4	2	1	0	0	0
Groundfish & Flatfish	97	80	78	1	1	1	1	1	1
Molluscs	229	205	199	13	19	26	6	10	13
Other Fishery Products	885	783	794	5	5	5	1	1	1
AGRICULTURAL PRODUCTS TOTAL	36,515	32,018	32,046	635	513	540	2	2	2
AGRICULTURAL, FISH & FORESTRY TOTAL	42,148	36,649	36,854	707	604	624	2	2	2

Source: World Trade Atlas

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	2008	2009	2010
Germany	5,836,113	5,103,300	4,662,961
Belgium	3,973,107	3,796,620	3,675,686
Brazil	2,122,390	1,796,040	1,799,803
France	2,078,491	1,726,205	1,609,183
Spain	1,460,366	1,355,936	1,419,179
South Africa	975,677	830,156	1,018,441
United Kingdom	962,928	860,181	836,341
Italy	797,279	752,963	822,092
United States	731,647	703,633	729,457
Poland	751,817	699,466	674,933
Other	9,110,628	8,065,186	8,115,499
World	28,800,443	25,689,686	25,363,575

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

USD 1,000	2008	2009	2010
Iceland	407,083	372,106	351,232
Germany	320,858	326,098	304,393
Belgium	185,691	209,080	160,553
China	176,866	171,684	156,489
Morocco	129,336	139,528	151,408
Norway	138,087	137,286	143,234
Vietnam	145,179	119,362	129,231
United Kingdom	120,299	105,097	117,355
Denmark	164,248	106,235	103,337
United States	97,951	91,759	87,622
Russia	60,311	71,306	72,416
Other	896,821	796,547	839,492
World	2,842,730	2,646,088	2,616,762

Source: World Trade Atlas

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

USD 1,000	2008	2009	2010
Netherlands	4,954,673	4,561,024	4,669,994
France	5,358,745	4,695,903	4,619,560
Germany	2746,463	2,415,739	2,365,400
Spain	939,228	906,764	946,507
Italy	866,648	815,603	816,668
Colombia	708,945	636,906	643,330
Brazil	697,381	689,101	544,254
United Kingdom	527,766	473,027	511,769
Costa Rica	658,714	494,169	430,000
New Zealand	534,137	394,435	353,633
Ecuador	379,747	345,401	348,336
United States	319,262	274,757	288,122
Other	3,351,687	3,079,898	3,073,352
World	22,043,396	19,782,727	19,610,925

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

USD 1,000	2008	2009	2010
Netherlands	530,930	493,683	476,618
France	211,091	203,433	194,607
Germany	131,805	114,988	115,570
Bangladesh	134,973	82,877	103,113
Denmark	99,785	85,101	90,244
Vietnam	97,070	92,874	86,197
Iceland	74,168	83,105	79,143
United Kingdom	82,104	66,998	75,271
China	107,689	67,215	73,366
India	98,690	64,782	67,054
Sweden	41,559	40,186	56,818
United States	27,367	31,523	37,948
Other	560,175	448,185	475,349
World	2,197,406	1,874,950	1,931,298

Source: World Trade Atlas