

USDA Foreign Agricultural Service

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Global Agricultural Information Network

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Netherlands

Food Processing Ingredients

Growing Opportunities in the Benelux Market

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Report Highlights:

The turnover of the Benelux food processing industry is estimated at 104 billion euro, with 9,300 companies employing 220,000 people. Benelux based importers are responsible for almost a quarter of total U.S. exports to the EU-27. This year exports are expected to be up by a quarter compared to last year. When meeting EU and Benelux standards, the following products have good sales potential: nuts, fish fillets, processed fruit and vegetables, cane molasses, juice concentrate, ingredients for the natural or healthy foods industry, bakery products dairy products, millet, spelled and meslin.

Post:

The Hague

Executive Summary:

Author Defined:

SECTION I. MARKET SUMMARY

The Food Processing Market

- The turnover of the Dutch food processing industry is estimated at almost 65 billion euro. Slaughter and meat processing, beverages, animal feed and chocolate and confectionary are the largest sectors. Around 4,300 food processing companies employ about 131,000 people.
- The turnover of the Belgian food processing industry is estimated at 39 billion euro with roughly 5,000 companies employing 89,000 people. The largest sectors continue to be the meat and meat processing sector, the dairy sector and the chocolate and confectionary sector.
- Due to the current economic conditions, the food processing industry is more than ever looking at ways to increase margins and diversify risk.

Table 1: U.S. exports of agriculture, fish and forestry products to the Benelux countries

	Belgium-Luxembourg	the Netherlands	Benelux countries
Bulk Agricultural Products	232,199	224,451	456,650
Intermediate Agricultural Products	159,414	434,822	594,236
Consumer-Oriented Agricultural Products	400,850	764,883	1,165,733
Forest Products	52,144	71,024	123,168
Fish and Seafood Products	34,984	165,748	200,732
Total	879,591	1,660,928	2,540,519

Source: FAS/The Hague

- Benelux based importers are responsible for almost a quarter of total U.S. exports of agriculture, fish and forestry products to the EU-27. Based on first 8 months figures of 2011, U.S. exports to the EU-27 are expected to be up by a fifth possibly denoting the highest export levels in the past decades. Exports to the Benelux countries look even more promising, up by over a quarter. Except for forest products, exports of all product groups are expected to increase.

Table 2: Exchange rate

Exchange rate	Year
1 USD = € 0.80	2006
1 USD = € 0.73	2007
1 USD = € 0.67	2008
1 USD = € 0.72	2009
1 USD = € 0.75	2010
1 USD = € 0.71	2011*

*first 10 months

Source: FAS/The Hague

Key Market Drivers:

- The majority of the processing companies are located close to the main port cities Rotterdam, Antwerp and Amsterdam. Knowledgeable traders, an excellent distribution system and an innovative economy make the Benelux an attractive market for processing and trading ingredients.
- Although the Benelux itself has a population of only almost 28 million people, within a radius of 200 miles from the Benelux border, the food processing industry has access to roughly 75 million affluent consumers, or 15% of the total EU population. This densely populated region covers important markets like North Rhine Westphalia, London and Paris. Germany, France and the UK continue to be important markets for the Benelux food processing industry.
- Benelux food processing industry has benefitted from EU expansion with over three-fourth of the region’s agricultural exports going to other EU MS. Greater growth opportunities are to be found outside the EU, in growing markets like Brazil, Russia, India and China.
- The on-going consolidation in the food processing industry, driven by the growing buying power of retailers, impacts the price and condition negotiations between processors and food ingredient suppliers. The food retail market is slightly growing at the expense of the foodservice market.
- In addition, more than ever before, the food processing industry is consolidating across the border. Not only did Benelux companies invest heavily in North and South America in recent years, international companies are also investing in the Benelux.
- In order to be successful in the Benelux food market and the larger EU market, U.S. exporters of food ingredients will have to comply with EU and national import regulations.
- The Benelux market can be characterized by an aging population, smaller households, growing ethnic diversity, greater awareness of healthy lifestyles and sustainable production systems, growing demand for new tastes, products and experiences.
- Obesity is a growing problem within the EU, suppliers of healthy ingredients can therefore claim added-value to their products.

Table 3: Advantages and Challenges

Advantages (sector strengths and opportunities)	Challenges (sector weaknesses and threats)
A favorable exchange rate make U.S. food ingredients more price competitive for Benelux food manufacturers	Sustainability standards are increasingly becoming a requirement of the Benelux food industry (MSC, RSPO, etc.)
Due to its geographical location, easy access to 15% of the EU population and excellent infrastructure and distribution system, the Benelux region forms an excellent gateway to the rest of Europe	Non-tariff trade barriers may at times even disturb trade between the EU and the U.S.
Benelux businessmen are in general considered to be business oriented, open-minded, straightforward, educated and often speak more languages	EU nutrition and health claims differ from the U.S.

A high level of knowledge and productivity; automation of production procedures	U.S. exporters may face competition from suppliers from EU MS due to tariffs and non-tariff trade barriers
The large and well developed food processing industry requires a wide range of ingredients, from low-value, unprocessed commodities to high-value, highly processed ingredients.	Relatively high labor costs and administrative burdens may lead to outsourcing activities to low labor costs countries
The high level of innovation and flexibility will lead to the ability to add more value to the finished food products	Several product cannot be exported to the EU since they are not approved (selected meat and meat products, GMO derived ingredients that are not EU approved, etc.)

Source: FAS/The Hague

SECTION II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

- U.S. companies that want to start exporting food ingredients to the Benelux market should research the market for a better understanding. This can be done by reading FAS Attaché Reports and contacting FAS/The Hague for clarification on specific issues.
- Once U.S. companies have this background information, they have several choices of how to enter the market. Many companies have benefited from attending at one of Europe's many USDA Endorsed trade shows, http://www.fas.usda.gov/agx/trade_events/2011_2012TSCalendar.pdf. They serve as a springboard into the market, helping them establish new trade contacts and gauge product interests. U.S. exporters can also contact their respective U.S. State Regional Trade Groups (SRTG), their commodity Cooperator Group and their State Department of Agriculture to obtain additional market entry support.

1. FAS Attaché Reports

- New-to-market exporters should begin the entry process by studying the FAS Attaché reports on the Benelux. The Benelux Exporter Guide contains a general overview of the macro-economic situation, discusses demographic trends, food trends, offers exporter business tips and shares overviews of the food retail and HRI sectors, GAIN Report – NL1008.
- Other helpful Attaché reports include the FAIRS (GAIN Reports: NL1001 and BE1001) and the Export Certification Report (GAIN Reports: NL0029 and BE0003), which provides an overview of import regulation standards and required health and origin certificates. A complete selection of FAS reports can be viewed online at: <http://www.fas.usda.gov/scripts/attacherep/default.asp>

2. FAS' Office of Agricultural Affairs in The Hague

- The Office of Agricultural Affairs in The Hague can be contacted for assistance with questions regarding the Benelux market, trade shows and other marketing or sales opportunities in that market. Contact information for FAS/The Hague is found at the end of this report.

3. Participation in Trade Shows

- Trade shows are excellent venues for U.S. exporters to make contact with potential business partners, to conduct product introductions and to gauge buyer interest. Several of the largest trade shows in the world

take place in Northwest Europe. Appendix 2 of the Benelux Exporter Guide GAIN Report – NL1008 will give you a complete overview of trade shows frequently visited by Benelux food buyers.

4. State Regional Trade Groups

- The State Regional Trade Groups (SRTG) are regionally located in the U.S. and are non-profit trade development organizations that help U.S. food producers and processors sell their products overseas. They are funded by FAS, the State Departments of Agriculture and private industry. They carry out promotional activities that increase exports of U.S. high-value food and agricultural products. Activities include participation in international trade shows, overseas trade missions, reverse trade missions, export education, in-country research, and point-of-sale promotions in foreign food chains and restaurants in markets around the world. The SRTGs also administer a cost-share funding program called the Brand program, which supports the promotion of brand name food and agricultural products in overseas markets. For more information, contact the state regional trade group responsible for your state:

Table 4: The four State Regional Trade Groups

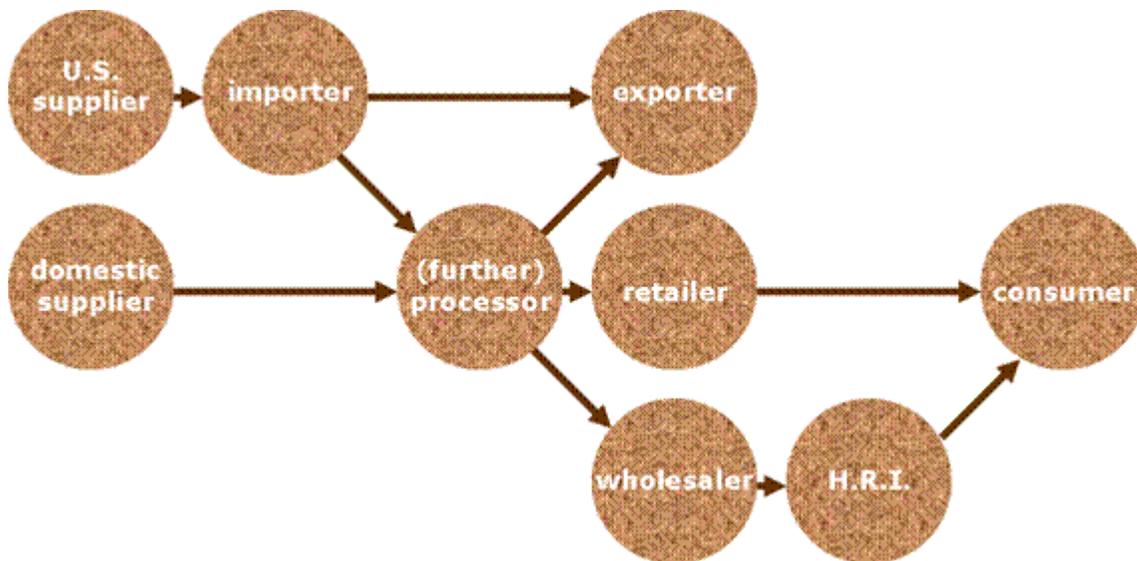
<p><u>Food Export USA - Midwest</u> Member states: Indiana, Illinois, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin E-mail: info@foodexport.org Web site: www.foodexport.org</p>	<p><u>Southern United States Trade Association</u> Member states: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas, Virginia, West Virginia E-mail: susta@susta.org Web site: www.susta.org</p>
<p><u>Western U.S. Agricultural Trade Association</u> Member states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming E-mail: export@wusata.org Web site: www.wusata.org</p>	<p><u>Food Export USA - Northeast</u> Member states: Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont E-mail: info@foodexport.org Web site: www.foodexportusa.org</p>

- The U.S. Agricultural Export Development Council is composed of U.S. trade associations and other organizations, in addition to the SRTGs, with an interest in promoting U.S. agricultural exports. For an overview and additional information on the various Commodity Groups, you can go to www.usaedc.org.

B. MARKET STRUCTURE

- Depending on the ingredient, there are different supply chains in the Benelux market. The general supply chain described below applies to the majority of the food ingredients. Benelux food processors source their ingredients from local producers and from importers (when ingredients are locally not available or not competitive). Only large processors might opt to import ingredients directly from foreign suppliers.

Figure 1: Supply chain



- U.S. exporters of food ingredients generally enter the Benelux market through a specialized importer. A good importer is not only aware of all import regulations and standards but can also be your partner in marketing your product. The Benelux food processing industry is well developed and has access to any food ingredient imaginable. In order to be successful in the Benelux market, the U.S. product has to have a competitive advantage like a lower price, innovative quality, different variety, desired size, seasonal available, high quality, etc. Products not produced in the EU or unavailable in large quantities have the potential to fare well in the Benelux although they might face fierce competition from other third country suppliers.

C. COMPANY PROFILES

Table 5: An overview of the largest food processing companies.

	Company Name	Turnover, worldwide (mln €)	Turnover, Netherlands (mln €)	Product group
1	Unilever	44,262	* 12,015	food
2	Heineken	16,133	* 7,894	beverages
3	VION Food Group **	9,600	n.a.	meat and ingredients
4	FrieslandCampina	8,972	2,291	dairy
5	Nutreco	4,938	554	meat, feed
6	DSM	3,005	n.a.	ingredients
7	CSM	2,990	n.a.	bakery ingredients
8	Cosun	1,766	639	potato, sugar, bakery
9	Wessanen	796	157	snacks, natural foods

* Western Europe

** 2009 figures

Source: www.lei.dlo.nl

D. SECTOR TRENDS

1. Sector trends

Sustainability

- Sustainability is in several ways a key concept for the strategy for the food industry in the near future. The FNLI, the Dutch Food Industry Federation, wants to position the industry as a responsible player in the Dutch society. Herewith a sound balance is sought between financial returns, social interests and the environment. Some of the sustainable themes include: (A) Sustainable food: enhancing the sustainability of the business practices in the food chain and increasing the turnover of the assortment of sustainable food products; (B) International Corporate Social Responsibility: increasing transparency regarding CSR within the food processing industry and supporting initiatives like Roundtable on Sustainable Palm Oil (RSPO). New initiatives are taken to further enhance the sustainability of the Coffee and Cocoa production chain.

Investments

- The Netherlands' trade and investment policy is among the most open in the world. With combined merchandise exports and imports virtually equal to GDP, the Dutch economy is one of the most internationally oriented in the world.
- Investors have found the Netherlands a favorable location for their European investments projects. The Dutch actively solicit foreign investment through the Netherlands Foreign Investment Agency (NFIA) and related regional economic development companies.
- Investment surveys indicate that U.S. investors favor the Netherlands as a location for European Distribution Centers (EDCs). The introduction of a more friendly tax regime in the late 1990s and a drop in the corporate tax rate to 25.5% in 2007 make the Netherlands an attractive location for European headquarters.
- Foreign investors find the Netherlands attractive because of the country's stable political and macroeconomic climate, a highly developed financial sector, the presence of a well-educated and productive labor force, and the high quality of the physical and communications infrastructure.
- Some potential bottlenecks in attracting foreign direct investments to the Netherlands include relatively high wage costs, heavy administrative burden and labor market imperfections (complex labor laws resulting in restricting hiring and firing practices for employers).
- For more information on the investment climate in the Netherlands, please go to the following website of the U.S. Department of State <http://www.state.gov/e/eeb/ifd/2008/101018.htm>.
- Information on the investment climate in Belgium can be found at the following website, <http://www.state.gov/e/eeb/ifd/2008/100822.htm>.
- The following table will give you an overview of some of the U.S. food companies (in alphabetical order) active in the Benelux market through joint ventures, acquisitions, etc.

Table 6: US companies in the Benelux market

U.S. companies:	Sector:
ADM	soya, oils, fats, cocoa
Bruce Foods	tex-mex food products
Campbell Foods	soup
Cargill	orange juice, grains, soft drinks, starch, poultry oils, fats, poultry, sugar, chocolate
Kraft	salad, convenience, coffee and confectionary products
Lamb Weston	potato

Master foods	confectionary products
PepsiCo	beverages, snacks, fats nuts, chips
Procter & Gamble	confectionery
Sara Lee	Coffee, meat products
Simplot	potato
Smithfield	meat products

Source: FAS/The Hague

II. Consumer trends

- 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, where time has become scarce. In their spare time they want to focus on their family, friends and a healthy lifestyle. Spending hours on preparing meals is not on that priority list unless the preparation of the dinner becomes is part of this spending time with family and friends.
- The double income households are willing to pay additional money 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 other concepts.
- 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.

Table 7: 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

Table 8: 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

Table 9: 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

Source: CBS, * FAS The Hague estimate

Table 10: Advantages And Challenges US Products Face In The Benelux

Advantages	Challenges
<ul style="list-style-type: none"> • Affluent and open-minded consumers • Highly developed infrastructure • Trade history and mentality • Strong interest in experimenting with new and innovative products and/or concepts • Favorable image of American products 	<ul style="list-style-type: none"> • Saturated markets • Transatlantic transportation is costly and takes time • Competition from local/regional supply • Tariffs and Non-Tariff trade barriers • Highly consolidated retail industry

Source: FAS/The Hague

Changing Tastes

- The non-Dutch population in the Netherlands (20%) annually grows by 2 percent whereas the population with Dutch ethnicity doesn't grow. 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 NL7021)

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. There has been a trend to a 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 born 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.

EU-approval of stevia

- The third Commission Regulation 1131/2011 approves the sweetener steviol glycosides, commonly known as stevia, which is extracted from the leaves of the Stevia Rebaudiana Bertoni plant. Stevia's approval for its use in several food categories will allow industry to innovate and to develop new products.

SECTION III. COMPETITION

Table 11: Overall competitive situation in the Netherlands

Product Category	Leading Countries of Origins	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers

	[+ USA]		
Peanuts Total Imports: 338 million USD 301 thousand MT	Argentina: 69% USA: [7%] China: 6% Brazil: 6%	Argentina continues to be the largest supplier	No local supply
Almonds (HS080212) Total Imports: 92 million USD 20 thousand MT	USA: [75%] Spain: 14%	Spain is an EU MS and located closer to the Netherlands than the U.S. The U.S. dominates the international almonds trade	The food processing industry needs more almonds than Spain can supply. The production in the U.S. continues to grow and increasingly supplies Europe with high and consistent quality of almonds
Pistachios (HS080250) Total Imports: 106 million USD 15 thousand MT	USA: [66%] Iran: 5% China: 1%	The U.S. dominates the international pistachios trade	Although China, Iran and the U.S. are all non-EU countries, the first two have experienced problems with aflatoxin in the past
Frozen fillets of Alaska Pollack (HS03042985) Total Imports: 30 million USD 16 thousand MT	USA: [51%] China: 32%	The U.S. leads the supply of Alaska Pollack; Iceland, Norway and China are suppliers of cod; Iceland and China supply respectively coalfish and saltwater fish	No or not enough local availability of price competitive fish fillets
Milk powder (HS040210) Total Imports: 351 million USD 131 thousand MT	Germany: 34% France: 27% Italy: 10% Poland: 9% USA: [2%]	Increasing prices of dairy products on the EU market induced imports from outside the EU, including the U.S.	Due to increased competition on bulk products on the world market, the EU sector is increasingly focusing on added value; this gives opportunities for U.S. producers to supply the EU market with certain dairy products
Processed fruit (HS200899) Total Imports: 211 million USD 205 thousand MT	Costa Rica: 23% India: 19% Ecuador: 18% USA: [4%]	The vast majority is mixed processed fruit with added sugar from predominantly Costa Rica, India and Ecuador	No local availability of price competitive (tropical) fruit
Soybeans	Brazil: 38%	South American origins are	The EU has only a minor

(HS12010090) Total Imports: 1,566 million USD 3,553 thousand MT	U.S.: [29%] Paraguay: 15% Canada: 8% Uruguay: 6%	competitive throughout most of the year. U.S. bean production could be able to claim to be more sustainable	production, which is insufficient to fulfill the domestic demand
Animal and vegetable fats and oils (HS15) 153 million USD 55 thousand MT	Belgium: 82% Germany: 8% U.K.: 3% U.S.: [1%]	EU demand for oils and fats is growing due to biofuels production. Crushing is increasingly conducted in the country of origin	EU production of rapeseed and sunflower seed is limited
Fruit and vegetable juices Total Imports: 1,422 million USD 975 thousand MT *	Brazil: (39%) Costa Rica: (8%) Thailand: (5%) USA: (4%) China: (3%)	Half of Dutch fruit juice import is citrus juice with Brazil and to a lesser extent Israel, the U.S. and Cuba as leading suppliers. The other half is dominated by pineapple juice imports from Thailand and Costa Rica, apple juice imports from China and grapefruit juice from Israel and the U.S.	No local availability of fruit and vegetable juices
Wheat Total Imports: 1,079 million USD 5,262 thousand MT	France: 49% Germany: 27% UK: 13% U.S.: [<1%]	U.S. wheat is high protein wheat and therefore useful for bakery and pasta preparation	Of the locally produced wheat only a portion is suitable for the food processing industry, with the remaining destined for feed
Starches (HS1108) Total Imports: 104 million USD 164 thousand MT	Germany: 42% France: 24% Belgium 18% Thailand: 7% U.S.: [1%]	U.S. exports are dominated by wheat starch (facing competition from EU MS like Germany, Lithuania and Belgium) and corn starch (facing competition from EU MS like France, Germany and Spain)	n.a.
Specialty grains (HS1008) Total Imports: 60 million USD 243 thousand MT	Germany: 58% Poland: 18% France: 9% U.S.: [<1%]	EU MS dominate trade. U.S. exports are dominated by millet; competition comes from Germany and Poland	n.a.
Spelt and meslin	France: 50%	The U.S. is a stable supplier	Domestic production is not

(HS100190) Total Imports: 1,068 million USD 5,211 thousand MT	Germany: 26% U.K.: 13% U.S.: [<1%]	compared to Russia and the Ukraine	subject to an import tariff
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Source: Globe Trade Atlas, 2010 data

* FAS/The Hague estimates

Table 11: Overall competitive situation in Belgium

Product Category	Leading Countries of Origins [+ USA]	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers
Almonds (HS080212) Total Imports: 60 million USD 13 thousand MT	USA: (59%) Spain: (20%)	Spain is an EU MS which makes trade with Belgium easier; the U.S. dominates the international almonds trade	The Belgian food processing industry needs more almonds than Spain can supply. The production in the U.S. continues to grow and increasingly supplies Europe with high and consistent quality of almonds
Pistachios (HS080250) Total Imports: 73 million USD 9 thousand MT	USA: (62%) Iran: (19%)	The U.S. dominates the international trade in pistachios	Although China, Iran and the U.S. are all non-EU countries, the first two have experienced problems with aflatoxin in the past
Fruit and vegetable juices Total Imports: 818 million USD 950 thousand MT *	Brazil: (65%) USA: (7%) Costa Rica: (2%)	Belgium's import of fruit juices is dominated by citrus juice imports from Brazil	No local availability of fruit and vegetable juices
Soybeans (HS12010090) Total Imports: 265 million USD 584 thousand MT	Canada: 21% U.S.: [10%] Paraguay: 8% Brazil: 5% China 1%	South American origins are competitive throughout most of the year. U.S. bean production could be able to claim to be more sustainable	The EU has only a minor production, which is insufficient to fulfill the domestic demand
Frozen fillets of Alaska Pollack (HS03042985)	China: 32% USA:	China leads the supply of Alaska Pollack; Iceland, Norway and China are	No or not enough local availability of price competitive fish fillets

Total Imports: 6 million USD 5 thousand MT	[2%]	suppliers of cod; Iceland and China supply respectively coalfish and saltwater fish	
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Source: Globe Trade Atlas, 2010 data

* FAS/The Hague estimates

SECTION IV. BEST PRODUCT PROSPECTS

Ingredients present in the market which have good sales potential

- Nuts (almonds, peanuts, pistachios, walnuts, hazelnuts and pecans)
- Fish fillets (frozen fillets of Alaska Pollack)
- Processed fruit
- Cane molasses
- Juice concentrate (juice from oranges, cranberries and grapefruit)

Ingredients not present in significant quantities, but which have good sales potential

- Ingredients for the natural or healthy foods industry
- Bakery products
- Dairy products (milk powder)
- Millet, spelt and meslin

Ingredients not present because they face significant barriers

- Meat products (chicken meat)
- GMO derived ingredients that are not EU approved

Category A: Products Present in the Market Which Have Good Sales Potential

Product category	2010 Market Size (volume)	2010 Imports (sales, million USD)	5 year average annual import growth	Key constraints over market development	Market attractiveness for USA
Tree nuts	663	663	1 percent	The U.S. dominates international trade	Growing demand and only small local production within EU
Soybeans	1,566	1,566	Stable	Competition comes from several South American countries	Good demand which provides opportunities for U.S. suppliers

SECTION V. POST CONTACT AND FURTHER INFORMATION

- If you have questions or comments regarding this report, or need assistance exporting to the Benelux, please contact the U.S. Office of Agricultural Affairs in The Hague:

U.S. Department of Agriculture's Foreign Agricultural Service
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<http://thehague.usembassy.gov/fas.html>

- Please view our website for more information on exporting U.S. food ingredients to the Benelux. Importer listings are available at the Office of Agricultural Affairs in The Hague.
- Please find below reports of interest to U.S. exporters that are exploring the opportunities to start exporting to the Benelux food processing market. These reports can be downloaded from the following FAS website: <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>