

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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

Required Report - public distribution

Date: 7/6/2016

GAIN Report Number: NL6014

Netherlands

Food Service - Hotel Restaurant Institutional

An Overview of the Foodservice Industry in the Netherlands

Approved By:

Susan Phillips

Prepared By:

Marcel H. Pinckaers

Report Highlights:

The Dutch foodservice industry is expected to grow annually by over two percent due to a recovering economy and changing consumer eating culture. The growing segments within the foodservice industry are especially the specialist coffee shops, juice/smoothie bars and food trucks. Young consumers are increasingly looking for new and convenient food solutions. The report furthermore presents a road map for U.S. exporters who wish to expand business in the Dutch market. U.S. food product with clean ingredients and healthy food products have the best sales potential on the Dutch market.

Table of Content

Section I.	Market Summary	2
Section II.	Road Map for Market Entry	7
Section III.	Competition	10
Section IV.	Best Product Prospects	11
Section V.	Post Contact and Further Information	13
Appendix I	Description of the various foodservice sub-sectors	14
Appendix II	Trade shows in Europe	15
Appendix III	Wholesalers in the Netherlands	17

Section I. Market Summary

Description and comparison of the foodservice sub sectors

The Dutch foodservice industry is composed of the following six sub-sectors: full-service restaurants, fast food outlets, cafés/bars, self-service cafeterias, 100% home delivery/takeaway and street stalls/kiosks. A brief description of each sub-sector can be found in Appendix I.

Value of the overall foodservice sales and growth rates by sub sector, past 5 years

In 2015, total sales of food product and beverages in the Netherlands were valued at almost \$50 billion. Food retailers were responsible for roughly three quarter of those sales while the foodservice industry accounted for the remaining quarter, or \$11.9 billion. Restaurants, fast food outlets and cafés/bars were the three largest sub-sectors. In 2015 their combined sales totaled \$10.5 billion, or almost 90 percent of total foodservice sales.

Table 1. Foodservice Sales, in million USD

	2011	2012	2013	2014	2015
Total Foodservice Sales	11,042	11,191	11,400	11,652	11,888

Source: Euromonitor

After several difficult years due to the financial crisis, the Dutch foodservice industry is now in better shape. The economy is recovering and consumer confidence and disposable income levels are growing. Last year the sector grew by two percent mainly due to the growing number of transactions and foodservice outlets. Menu prices however have not increased.

Table 2. Growth Rates by Sub Sector, in percentage

	2010-11	2011-12	2012-13	2013-14	2014-15
Full-Service Restaurants	5.2	1.8	1.8	2.3	1.7
Fast Food	5.3	0.9	2.5	2.6	2.3
Cafés/Bars	2.4	0.2	-0.1	0.5	2.5
Self-Service Cafeterias	-0.2	2.5	5.0	2.5	-1.9
100% Home Delivery/Takeaway	4.6	4.7	5.9	8.8	6.5
Street Stalls/Kiosks	2.6	2.5	0.9	0.7	2.9

Source: Euromonitor

Annual growth rates for full-service restaurants have been stable for the past few years at almost two percent. The same applies to fast food outlets. They demonstrated an annual growth rates between two and three percent. The growth rate for cafés/bars picked up in 2015, driven by growing sales at specialist coffee shops and juice/smoothie bars. The opposite development happened for self-service cafeterias. After several years of positive growth rates, the turnover in this segment dropped by almost two percent in 2015. Chained self-service cafeterias like La Place and HEMA struggled to maintain transaction levels while independent self-service cafeterias saw their number of outlets decline. Although the annual growth rate dropped, last year was another good year for the 100% home delivery/takeaways sub-segment. The growth rate of almost seven percent was driven by strong consumer demand for convenience consumption. Young urban consumers who live in single households are an important group. This group finds it convenient to not prepare food themselves while being able to stay at home. Another important target group is consumers who work out-of-home late in the evening and prefer to order from 100% home delivery/takeaway companies over consuming evening meals brought to work from home.

Expected growth rates of the foodservice sector and its sub sectors

Table 3. Expected Growth Rates of total Foodservice Sales, in percentage

	2015-16	2016-17	2017-18	2018-19	2019-20
Foodservice	2.0	2.3	2.3	2.6	2.8

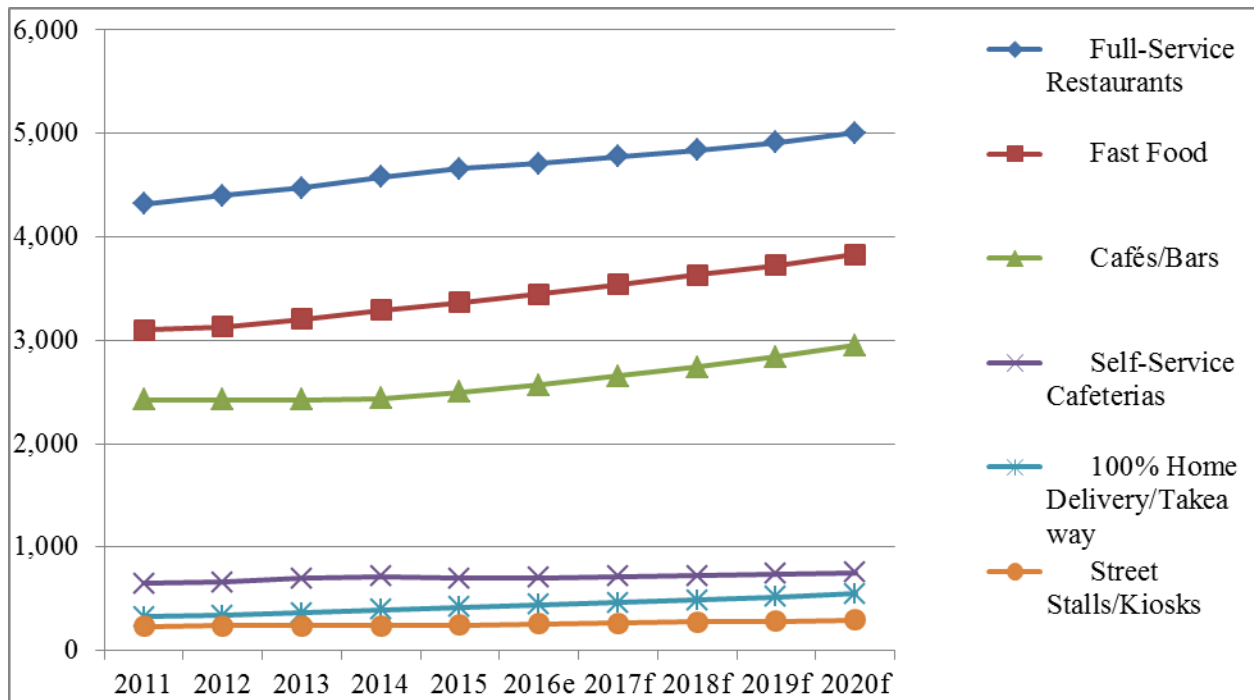
Source: Euromonitor

The future for the Dutch Foodservice industry looks bright. Annual growth rates are expected to increase from two percent this year to almost three percent in 2020. There are two main developments that drive this positive outlook. The first one is the positive performance of the Dutch economy. The Netherlands Bureau for Economic Policy Analysis (CPB) forecasts that Dutch GDP will grow this year by 1.8 percent and 2.1 percent next year. The unemployment rate is forecasted to further drop from 6.4 percent this year to 6.2 percent next year while the annual inflation rate is expected to pick up from 0.1 percent this year to 0.9 percent in 2017.

The Dutch eating culture is changing; this trend is driven by the millennials¹. The traditional 3 meals-a-day (breakfast, lunch and dinner) is slowly being replaced by five snacking moments. At the same time, eating at home is slowly transitioning to eating while traveling, working or meeting friends. Food choices and eating moments are becoming more tailor-made. These developments will all have a positive effect on consumer spending in foodservice outlets.

Figure 1: Turnover of the Consumer Foodservice Sub-Sectors, in million USD, 2011-2020

¹ A consumer group born between the early 1980s to around 2000.



Source: Euromonitor

e = expected sales

f = forecasted sales

The importance of online ordering and delivery services is expected to grow further as the number of single person households continues to grow. There is also a growing interest in finding a good “work-life balance” resulting in more flexibility in working hours and teleworking.

Table 4. Expected Growth Rates by Sub-Sector, in percentage

	2015-16	2016-17	2017-18	2018-19	2019-20
full-service restaurants	1.2	1.3	1.3	1.6	1.9
fast food	2.3	2.6	2.6	2.6	2.8
cafés/bars	2.7	3.2	3.4	3.7	3.9
self-service cafeterias	0.9	1.1	1.5	1.8	1.7
100% home delivery/takeaway	5.3	5.1	5.3	5.7	6.3
street stalls/kiosks	4.2	3.5	2.7	3.4	3.8

Source: Euromonitor

Number and type of foodservice establishments by subsector

Last year the total number of establishments increased by one percent. This number is not expected to change much in the coming years. Restaurants, cafés/bars and fast food outlets have the highest number of establishments. The real changes will take place in the latter two sub-sectors along with street stalls/kiosks.

Table 5. Number of Foodservice Establishments by Sub-Sector

	2011	2012	2013	2014	2015	2016 ^f	2017 ^f	2018 ^f	2019 ^f	2020 ^f
full-service restaurants	12,733	12,749	12,781	12,844	13,085	13,174	13,213	13,244	13,260	13,266
cafés/bars	13,162	12,939	13,007	13,059	12,835	12,628	12,444	12,278	12,128	11,989
fast food	10,026	9,755	9,765	9,802	9,953	10,030	10,116	10,203	10,286	10,363
street stalls/kiosks	2,474	2,502	2,525	2,549	2,700	2,808	2,907	3,010	3,120	3,238
100% home delivery/takeaway	936	966	996	1,055	1,103	1,134	1,159	1,186	1,216	1,252
self-service cafeterias	524	503	510	499	490	486	487	480	474	475
Total	39,855	39,414	39,584	39,808	40,166	40,260	40,326	40,401	40,484	40,583

Source: Euromonitor

f = forecast

Cafés/bars

The number of cafés/bars is expected to drop further. Traditional cafés are suffering from low popularity among younger consumers. Older consumers too are increasingly abandoning cafés in favor of restaurants which offer a more varied food selection. The increase of the minimum drinking age from 16 to 18 which entered into force on January 1st, 2015 was a setback for the growth prospects of bars and pubs as they rely heavily on sales of alcoholic beverages. Also the growing popularity of food festivals¹ tends to draw away consumers. The only growing segments within the cafés/bar sub-sector are the specialist coffee shops and juice/smoothie bars due to the rising interest among young and affluent urban consumers in high-quality coffee and healthy drinks.

Fast food

The so-called “snack bars” is the segment within the fast-food sector with the largest amount of outlets (2,900 in 2015). Snack bars traditionally serve French fries and meat-based deep-fried snacks. The number of snack bars however is dropping as they suffer from an outdated image. They also have a reputation for offering food which is both unhealthy and excessively traditional. The total number of fast food establishments however is forecasted to grow as younger consumers are looking for new, non-Western, less formal and low priced fast-food formulas. This explains the entry of Baba Rafi’s Indonesia based kebab chain and also the further expansion of Middle Eastern fast food outlets.

Street stalls/kiosks

The number of street stalls/kiosks grew in 2015 by almost six percent due to the growing number of food trucks. Coming years the number of food trucks will continue to grow as young consumers are looking for new types of fast food. The number of food truck festivals is also rising. Due to the relative low startup costs it is easy for new entrants. Food trucks do not sell French fries or hot dogs but innovative high-end foods and drinks inspired by cuisines from all over the world. The city of Amsterdam launched a pilot project permitting 50 food trucks owners to sell their products from 24 designated locations. If successful, this project could be rolled out in other Dutch cities.

Value of imported food versus domestic products over the past 5 years

In 2015, Dutch agricultural imports were valued at \$54.5 billion. Imports from the United States totaled \$2.7 billion, or 17 percent of EU imports from the United States. The port of Rotterdam is the largest port in Europe

and the world's sixth largest port. The Dutch are excellent traders and much of the agricultural imports are re-exported directly or after adding value.

The vast majority of fresh and processed food products destined for the Foodservice industry fall in the Consumer-Oriented and Fish and Seafood Products category. The Netherlands is the largest market within the EU for these products from the United States. The United States is the 6th largest supplier of Consumer-Oriented Products to the Netherlands and trade continues to grow. The U.S. market share also grew from almost three percent in 2011 to over four percent last year. In 2015, the highest export levels since at least 1970 were posted for beef & beef products, processed vegetables, tree nuts and condiments & sauces.

After Iceland, Germany, Russia, Norway, Belgium and Vietnam, the United States is the 7th largest supplier of Fish and Seafood Products to the Netherlands. U.S. exports of Fish and Seafood Products to the Netherlands are also growing, especially for scallops, shrimp and prawns, hake, dogfish and octopus. The U.S. market share grew from three percent in 2011 to five percent last year. On the following website, <http://apps.fas.usda.gov/gats/BicoReport.aspx?type=country>, you will find additional trade statistics and an overview of the various products that fall under Consumer-Oriented products and under Fish and Seafood products.

Table 6. Netherlands Import of Consumer-Oriented products, in million USD

	2011	2012	2013	2014	2015
Total imports	30,116	29,576	31,292	32,803	28,732
U.S. imports	845	844	976	1,134	1,186

Source: Global Trade Atlas

Table 7. Netherlands Import of Fish and Seafood products, in million USD

	2011	2012	2013	2014	2015
Total imports	3,129	3,023	3,067	3,560	2,969
U.S. imports	99	95	104	121	139

Source: Global Trade Atlas

Developments and trends that affect the foodservice industry

The Foodservice Institute Netherlands (FSIN) follows the trends in the Dutch foodservice market. Below are the main consumer trends that will affect the foodservice market:

- Time is becoming scarce as consumers are busy with work, school, hobbies, sports and other (social) engagements. There is less time for cooking and as a result a growing demand for convenience. Eating is increasingly combined with travel, meeting friends, working or studying.
- There is a growing demand for single portion food solutions as the number of single households is growing. Also family members are not eating together at the same time anymore; eating becomes more individual.
- Consumers are also increasingly ‘engaged’. They are more than ever interested in fair-trade, animal welfare, buying local, organic food products and sustainable production methods. This type of consumer, often young and urban, is interested to hear the story behind the product. They are looking for real products, real ingredients and real stories. This especially applies to full-service restaurants.

- It is very common in the Netherlands to have a smart phone. Consumers inform themselves by visiting websites of foodservice outlets and they take decisions online. Sending an email, a text message or what's app is preferred above ringing up a restaurant.
- Through social media consumers inform one another about 'what's hot' and 'what's not'. What was the service like? Was the food any good? Where there any extras? What was the atmosphere like? Was it affordable? These are all part of the discussion. Pictures of the dishes, along with a comment, are often shared through social media. Consumers use platforms like iens.nl, eetnu.nl, zoover.nl and tripadvisor.nl to recommend a foodservice establishment or not.
- The number of international tourists that visit the Netherlands is growing. Foodservice establishments are likely to benefit by drawing in more tourists as customers. This also means that more customers will order in English and will want to learn about what food or dishes are offered. Product information, service and hospitality are 'key' for tourists.

Figure 2. Advantages and Challenges U.S. Exporters Face in the Netherlands

<i>Advantages (product strengths and market opportunities)</i>	<i>Challenges (product weakness and competitive threats)</i>
Favorable image of U.S. products.	Transatlantic transportation is costly and takes time (3 to 5 weeks).
Affluent, curious and open-minded consumers.	Fierce competition on price, quality, unique-ness and innovation.
The foodservice industry is fragmented (often family run businesses) and therefore flexible enough to meet changing consumer demands.	Profit margins on food are thin while the margins on beverages (including wines and beer) are higher.
Growing demand for organic food products, sustainable production methods and food products with clean ingredients.	Suppliers from other EU MS have a competitive advantage on tariffs and non-tariff trade barriers, transportation costs and transportation time.
Interest in experimenting with new and innovative products and/or concepts.	Non-NHTC beef, poultry, shellfish and products containing GMO derived ingredients that are not EU approved cannot be exported to the Netherlands.
Growing demand for fresh and processed food products that contribute to a healthier lifestyle.	The EU has several Free Trade Agreements which may advantage other 3rd country competitors.

Section II. Road Map for Market Entry

A. Entry Strategy

Success in introducing your product in the Dutch market depends on the level of market knowledge. The Office of Agricultural Affairs in The Hague writes several Exporter Assistance reports like the [Food Processing Ingredients Market](#) report, The [Food Retail Market](#) report, the [Exporter Guide](#) and the [Food and Agriculture Import Regulations and Standards](#) (FAIRS) Report. These and other commodity reports will help you to understand the Dutch market for your products. The reports can be downloaded on the [FAS](#) website.

The relationship with the buyer is also very important. Not only does he know the market, the specialized importer also knows what document and certificate needs to accompany your product. Final approval of any product is subject to the Dutch rules and regulations as interpreted by border officials at the time of product entry. More detailed information on the Netherlands import regulations and standards can be found in the above FAIRS report. The Office of Agricultural Affairs (OAA) in The Hague maintains a list of buyers of various Consumer Oriented products and Seafood products.

Trade shows are excellent venues for U.S. exporters to make contact with potential Dutch buyers, to conduct product introductions and to gauge buyers' interest. Depending on the products, U.S. exporters should consider visiting or exhibiting at one of the many trade shows in Europe. A detailed overview of the trade shows can be found in Appendix II.

For more information, please contact:

Marcel H. Pinckaers

Embassy of the United States

Lange Voorhout 102, 2514 EJ The Hague, The Netherlands

Phone: +31 (0)70 3102 305

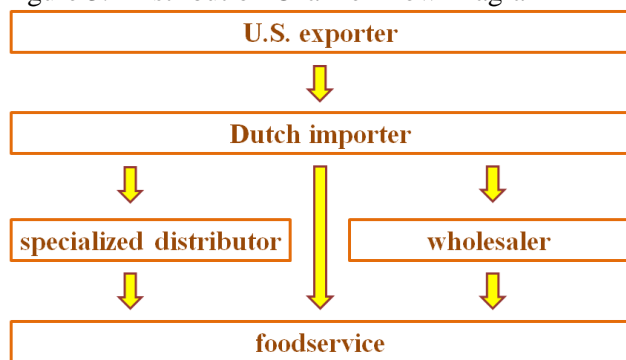
marcel.pinckaers@fas.usda.gov

www.fas.usda.gov

B. Market Structure

The overall Dutch foodservice industry is highly fragmented and characterized by independent entrepreneurs. This is especially the case for cafés/bars, restaurants, cafeterias and street stalls/kiosks. The majority of fast food outlets on the other hand are not fragmented as they are often part of a chain. Well-known examples of chained fast food outlets in the Netherlands are McDonalds, Burger King, KFC, Délifrance and Bakker Bart, together responsible for 60 percent of the fast food market. Also 100% delivery/takeaway outlets are often part of a larger chain. Domino's Pizza, New York Pizza and Spare Rib Express are all active on the Dutch market.

Figure 3. Distribution Channel Flow Diagram



Source: FAS/The Hague

The independent foodservice entrepreneurs buy through different channels as the figure indicates. In general all products are delivered. The entrepreneur does not have the time to go to a shop to buy the ingredients he needs that week. Also there is always the risk that products are not in stock. By ordering the products and having them delivered, the entrepreneur knows he will have the right quantities at the right time.

Appendix III gives an overview of all wholesalers active in the Netherlands. Almost all wholesalers have shops and delivery services. DeliXL and HORESCA have no shops and only deliver their products while Marko only has shops and hardly delivers. Most wholesalers operate nationwide with the exception of Kweker, Zegro and HORESCA who are active regionally.

Fresh products like bread, cakes, produce and dairy products are predominantly bought via specialized distributors. The added value lies in the possibility to have tailor-made orders, the interpersonal relationship and the guarantee you will receive the product and right amount you were looking for. Depending on the product, the distributors source their products directly from primary producers, food companies or Dutch importers. In some cases the distributor and the importer are the same company. This is especially the case for fresh products like meat and seafood.

For shelf stable grocery products, such as spices, nuts, sauces, and cooking ingredients, foodservice entrepreneurs turn to wholesalers. Wholesalers traditionally do not import from outside the European Union but work with specialized importers.

Alcoholic drinks like beer and wines are often bought directly from a brewery and local wine importer who also buy directly from the foreign supplier.

C. Sub Sector Profiles

Table 8. Top Five Largest Fast Food Companies, million USD, 2014 figures

	Name	Turnover	Sub sector
1	McDonalds	733	Fast food
2	Burger King	102	Fast food
3	KFC	93	Fast food
4	Subway	52	Fast food
5	FEBO	42	Fast food

Source: Misset Horeca

Table 9. Top Five Largest 100% Delivery/Takeaway Companies, million USD, 2014 figures

	Name	Turnover)	Sub sector
1	Domino's Pizza	80	100% delivery/takeaway
2	New York Pizza	61	100% delivery/takeaway
3	Bufkes	35	100% delivery/takeaway
4	Spare Rib Express	17	100% delivery/takeaway
5	Verhage	16	100% delivery/takeaway

Source: Misset Horeca

Table 10. Top Five Largest Self-Service Catering Companies, million USD, 2014 figures

	Name	Turnover	Sub sector
1	La Place	258	self-service catering
2	Vermaat Groep	124	self-service catering
3	HEMA	118	self-service catering
4	Albron	110	self-service catering
5	Ikea	71	self-service catering

Source: Misset Horeca

Table 11. Top Five Largest Full Service Restaurants, million USD, 2014 figures

	Name	Turnover	Sub sector
1	Van Der Valk	661	full service restaurants
2	Landal Greenpark	331	full service restaurants
3	Accor Hotels	254	full service restaurants
4	NH Hotels	247	full service restaurants
5	Hampshire hospitality	208	full service restaurants

Source: Misset Horeca

A list of Dutch wholesalers can be found in Appendix III.

Section III. Competition

This section summarizes the overall competitive situation that U.S. suppliers face in the food service market and their market share. In addition the strengths of the key supplying countries and the advantages and disadvantages of local suppliers are discussed per product category.

Table 12. Competitive Situation U.S. Suppliers Face in the Dutch Foodservice Market

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers
Seafood Total imports: 2,969 million USD	1.Iceland - 12% 2.Germany - 9% United States - 5%	Iceland is the leading supplier of cod while Germany dominates Dutch imports of pelagic fish. The United States leads the supply of Alaska Pollack and scallops.	Except for herring, the Dutch depend on foreign suppliers for almost all seafood species ranging from Pollack and cod to salmon, scallops and lobster. The Netherlands is an active importer and exporter of seafood and serves the food processing, retail and foodservice markets.
Fresh fruit Total imports: 3,739 million USD	1.South Africa - 18% 2.Chile - 11% United States - 1%	Southern hemisphere countries complement EU fresh fruit production. South Africa and Chile are both leading suppliers of grapes and avocados. The U.S. mainly exports grapefruits, mandarins, guavas, cranberries and dates to the Netherlands.	Citrus and exotic fruit are locally not available.
Wine Total Imports: 1,016	1.France – 31% 2.Germany - 12%	France and Germany have good quality wines at competitive price. They are also neighboring countries and popular holiday destinations for the Dutch.	No commercial availability in the Netherlands.

million USD	United States - 1%		
Pulses Total imports: 68 million USD	1.China - 18% 2.United States – 15% 3.Turkey - 9%	China is a large supplier of various dry beans to the Netherlands while the United States has a strong position in exporting kidney beans and increasingly lentils. Turkey dominates Dutch imports of lentils and to a lesser extent chickpeas.	No or not enough local supply. The trend towards eating healthier food and experimenting with international cuisines is driving demand for pulses.
Beef Total imports: 1,887 million USD	1.Germany - 15% 2.Brazil - 9% 3.United States - 9%	Germany predominantly sells great volumes of lower quality and price competitive beef (milk cows) targeting the Dutch meat processing industry. The United States exports high quality and grain fed beef for the high-end foodservice industry. It is known for its quality, consistency and taste. Brazil serves both markets.	There is not enough Dutch beef of high quality available. Ireland, the United States, Argentina and Brazil profit from this deficit in the Dutch market.

Source: Globe Trade Atlas

Section IV. Best Product Prospects

Products that meet the following criteria, in addition to a competitive price, have the best prospect to be sold on the Dutch market:

1. Unique and innovative products (taste, packaging, size);
2. Products not sufficiently available in the Dutch market;

Products Present in the Market Which Have Good Sales Potential

- Nuts: almonds, peanuts, pistachios, walnuts, hazelnuts, pecans;
- Seafood: Alaska Pollack, salmon cod, halibut, scallops, lobster;
- Fresh fruit and vegetables: sweet potatoes, grapefruit, Minneola, cranberries, etc.;
- Fruit juice concentrates: orange juice, cranberry, grapefruit;
- Sauces and condiments;
- Snack foods;
- California wines;

Products Not Present in Significant Quantities, but Which Have Good Sales Potential

- Food products with clean ingredients (also known as free-from products, organic food, sustainable food products);
- Pulses: dried peas, beans, chickpeas and lentils;
- Sweet corn;
- Micro breweries' beers;
- Wines from other States;

Products Not Present Because They Face Significant Barriers

- Specialty products containing GMO derived ingredients;
- Poultry;
- Non-NHTC beef
- Clams

Table 13. Table Best Product Prospects for the Netherlands, in million USD, for 2015

Product category	Dutch imports	Dutch imports from the United States	2011-2015 Average annual import growth	Key constraint over market development	Market attractiveness for the United States
Beef	1,887	172	15%	Unfamiliarity of secondary cuts. Competition from South America, Australia/New Zealand and Ireland on price.	Strong demand in high-end HRI industry. Growing awareness at mainstream HRI level and specialty retail outlets.
Craft beer	278	3.7	35 %	Transportation costs and time. Competition from wines. Competition from suppliers from EU countries.	Restaurants are increasingly serving craft beer to complement different meals.
Scallops	81	36	35%	Price concern and unawareness among the average Dutch consumer.	Growing awareness and interest in scallops.
Sweet potatoes	59	32	30%	The majority of the Dutch is unfamiliar on how to prepare sweet potatoes and when to use it.	Restaurants are increasingly serving sweet potatoes.
Chickpeas	3.8	0.2	30%	The older and more traditional consumer is unfamiliar with humus or when to use chickpeas.	The younger and more traveled consumers simply love humus and use chickpeas in soups, salads, and meals.

Source: Global Trade Atlas

Section IV. Post Contact and Further Information

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

U.S. Department of Agriculture’s Foreign Agricultural Service
Office of Agricultural Affairs

Mr. Marcel H. Pinckaers
Embassy of the United States
Lange Voorhout 102, 2514 EJ The Hague, The Netherlands
Phone: +31 (0)70 3102 305
marcel.pinckaers@fas.usda.gov
www.fas.usda.gov

FoodService Instituut Nederland (FSIN)
Ms. Inga Blokker
Galvanistraat 1
6716 AE Ede
+31 (0)88 730 48 00
info@fsin.nl
www.fsin.nl

Appendix I. Description of the various foodservice sub-sectors

Full-service restaurants: Full-service restaurants encompass all sit-down establishments where the focus is on food rather than on drink. It is characterized by table service and a relatively higher quality of food offering. It also includes à la carte, all-you-can-eat and sit-down buffets within restaurants. Restaurants at resorts and hotels are in general categorized as full-service restaurants.

Fast food outlets: Fast food outlets are typically distinguished by the following characteristics: a standardized and restricted menu, food for immediate consumption, tight individual portion control on all ingredients and on the finished product, individual packaging of each item, a young and unskilled labor force, and counter service.

Cafés/bars: This sector encompasses all establishments where the focus is on drinking both alcoholic or non-alcoholic beverages and where food is also served. While a wide variety of snacks and full meals are offered, it is more common for customers to only order a drink. Cafés/bars includes bars/pubs, cafés, juice/smoothie bars, and specialist coffee shops.

Self-service cafeterias: They provide no (or limited) service content. Food is presented on counters or available made-to-order through food stalls. The customer chooses the items they want and pays for everything at a separate pay station or check-out.

100% home delivery/takeaway: Fixed units which provide no facilities for consumption on the premises. Food can either be picked up by the consumer, or delivered, often for an additional charge. Common offerings include: pizzas, Chinese, Indian, Mexican, and other local national offerings.

Street stalls/kiosks: Small, mobile foodservice providers characterized by a very limited product offering and by low prices. It includes kiosks and carts located externally or internally e.g. shopping malls. They are often specialized in snacks or a particular dish. This sub-sector also includes food trucks.

Appendix II. Trade shows in Europe

Show	When	Show Details
<p>SIAL, Paris, France Europe's largest food & beverages show in 2016 <i>*USDA Endorsed*</i> Contact: Laurent Journo +33 14312 2245 laurent.journo@fas.usda.gov</p>	<p>October 16 -20, 2016 Bi-Annual</p>	<p>sial.fr</p>
<p>International Confectionary Fair (ISM), Cologne, Germany European confectionary show Contact: Kelly Stange +49 3083 05 1151 kelly.stange@fas.usda.gov</p>	<p>January 29 - February 01, 2017</p>	<p>ism-cologne.com</p>
<p>Fruit logistica, Berlin, Germany European fruit, vegetable and nuts show <i>*USDA Endorsed*</i> Contact: Kelly Stange +49 3083 05 1151 kelly.stange@fas.usda.gov</p>	<p>February 8 - 10, 2017</p>	<p>fruitlogistica.com</p>
<p>BioFach, Nuremberg, Germany European organic show <i>*USDA Endorsed*</i> Contact: Kelly Stange +49 3083 05 1151 kelly.stange@fas.usda.gov</p>	<p>February 15 - 18, 2017</p>	<p>biofach.de</p>
<p>ProWein, Dusseldorf, Germany Europe's largest wine trade show in 2017 Contact: Kelly Stange +49 3083 05 1151 kelly.stange@fas.usda.gov</p>	<p>March 19 – 21, 2017 Annually</p>	<p>prowein.com</p>
<p>Seafood Exhibition Global (SEG), Brussels, Belgium World's largest seafood show <i>*USDA Endorsed*</i> Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305</p>	<p>April 25 - 27, 2017</p>	<p>euroseafood.com</p>
<p>ANUGA, Cologne, Germany Europe's largest food & beverages show in 2017 <i>*USDA Endorsed*</i> Contact: Kelly Stange</p>	<p>October 07 - 11, 2017 Bi-Annual</p>	<p>anuga.com</p>

+49 3083 05 1151
kelly.stange@fas.usda.gov

Food Ingredients Europe, Frankfurt, Germany
European food ingredients show
USDA Endorsed
Contact: Kelly Stange
+49 308 305 1151
kelly.stange@fas.usda.gov

November 28 – 30, 2017
Bi-Annual

foodingredientsglobal.com

Appendix III. Wholesalers in the Netherlands

<p>Deli XL [Delivery] Mr. D. Slootweg P.O. Box 440 Frankeneng 18 6710 BK, Ede, the Netherlands P: +31-(0)318-678911 E: dick.slootweg@ahold.nl W: www.delixl.nl</p>	<p>Hanos [Shop and Delivery] Mr. H. van Looijengoed P.O. Box 10378 Stadhoudersmolenweg 37 7301 GJ, Apeldoorn, the Netherlands P: +31-(0)55-5294646 E: hvanlooijengoed@hanos.nl W: www.hanos.nl</p>
<p>HOESCA [Delivery] Weversbaan 25F 2352 BZ Leiderdorp, the Netherlands P: +31 (0)71-5412011 E: info@horesca-horecavo.nl W: www.horesca-horecavo.nl</p>	<p>De Kweker [Shop and Delivery] Mr. Jan Boer Jan van Gaalenstraat 4 1040 KH, Amsterdam, the Netherlands P: +31-(0)20-6063606 E: info@kweker.nl W: www.kweker.nl</p>
<p>Makro (Metro Cash & Carry) [Shop] Mr. M. (Maarten) Van Hamburg Mr. B. Eijssink Diermervijver, Gebouw Vijverpoort, Dalsteindreef 101-139 1112 XC Diemen, the Netherlands P: +31-(0)20-3980200 I: bas.eijssink@metro-mcc.nl W: www.makro.nl</p>	<p>Sligro [Shop and Delivery] Mr. Dries Beugels P.O. Box 47 Corridor 11 5460 AA, Veghel, the Netherlands P: +31-(0)413-343500 E: info@sligro.nl E: dbeugels@sligrofoodgroup.nl W: www.sligrofoodgroup.nl</p>
<p>VHC [Shop and Delivery] P.O. Box 90 3340 AB Hendrik-Ido-Ambacht, the Netherlands P: +31-(0)78-6833400 I: info@vhc.nl W: www.vhc.nl</p>	<p>Zegro [Shop and Delivery] Schuttevaerweg 24, 3044 BB Rotterdam, the Netherlands P: +31 (0)10 298 7474 E: info@zegro.nl W: www.zegro.nl</p>

Source: FAS/The Hague

ⁱ Food festivals are events where a group of different food trucks are grouped together. Each food truck offers a unique high quality product. Food festivals often take place in the summer and in larger cities.