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Netherlands

Food Service - Hotel Restaurant Institutional

An overview of the HRI Market in the Netherlands and Belgium

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Report Highlights:
This report gives an overview of the food service industry and its various sectors within the Netherlands and Belgium. It provides an understanding of the key channels of distribution for foods and beverages destined for food service. It identifies the major players as well as giving contact information for all the main groups within the industry. Healthy, organic food and sustainable food products have excellent sales potential, while the market remains receptive for new U.S. products.
Introduction

The Foodservice – Hotel Restaurant Institutional (HRI) report provides an important road map for exporters of U.S. products who wish to enter the food service market in the Netherlands and Belgium. Furthermore they will gain an understanding of the key channels of distribution for foods and beverages destined for food service. The report summarizes key sector developments, provides market opportunities, identifies distribution channels, provides sub-sector profiles, and describes the competitive situation and best products prospects.

Description and Comparison of the Consumer Foodservice Sub Sectors

The Benelux consumer foodservice sector covers cafés/bars, fast-food outlets, full service restaurants, 100% home delivery/takeaway, self-service cafeterias, street stalls/kiosks and pizza consumer foodservice.

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 not uncommon for customers to only order a drink. Cafés/bars includes bars/pubs, cafés, juice/smoothie bars, and specialist coffee shops.

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; counter service. For chained fast food, chained and franchised operations which operate under a uniform fascia and corporate identity.

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.

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. 100% home delivery/takeaway differ from street stalls/kiosks in that outlets tend to be more permanent, often with more elaborate on-site cooking facilities, including ovens. Menus tend to be larger and more meal-based, with street vendors more often specializing in snacks or a particular dish.

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.

Street stalls/Kiosks: Small, mobile foodservice providers characterized by a very limited product offering and by low prices. Includes street hawker and larger branded complexes, for example in Asia-Pacific. Also includes kiosks and carts located externally or internally e.g. shopping malls.

Value Of The Overall Benelux HRI Industry And Sub-Sectors, Past 5 years
The turnover of the Belgian consumer foodservice industry is stable around $10.6 billion\(^1\). After declining sales in 2008 and 2009, especially in the cafés/bars and full-service restaurants, the industry seems to be on the road of recovery. Full service restaurants, fast-food outlets and cafés/bars dominate the Dutch HRI industry.

The Dutch consumer foodservice industry is also recovering from disappointing results in 2008 and 2009. Especially the full-service restaurants and fast food outlets have demonstrated strong growth since 2010. The

\(^1\) 1\$=0.758\€
turnover of cafés/bars however, declined by a quarter, past 5 years. Last year, the turnover of the Dutch consumer foodservice industry reached $13.1 billion.

**Expected Growth Rates of the Benelux Consumer Foodservice Industry and Its Sub-Sectors, Coming Years**

Figure 3: expected value of The Consumer Foodservice sub sectors, in euro, the Netherlands, 2012-2017

![Graph showing expected value of sub sectors in the Netherlands](image)

Source: Euromonitor

Figure 4: expected value of The Consumer Foodservice sub sectors, in euro, Belgium, 2012-2017

![Graph showing expected value of sub sectors in Belgium](image)

Source: Euromonitor

The consumer foodservice industry in Belgium is forecasted to decline by almost 11 percent to $9.5 billion in 2017. The main reason behind this is the declining sales in cafés/bars and full service restaurants. The Dutch market for consumer foodservice is forecasted to stabilize coming years around $13.2 billion. The fast food industry is forecasted to grow slightly in both markets.
Number and Type of Benelux HRI Establishments

Between 2007 and 2012, the number of foodservice outlets decreased in both Belgium (-12 percent) and the Netherlands (-3 percent). The declining number of outlets was especially noticeable in cafés/bars and street stalls/kiosks in Belgium.

The Full service restaurants and cafés/bars are the largest sectors in terms of number of establishments, accounting together for three quarter of all outlets. Fast food is the third largest sector.

Value of Imported Food versus Domestic Products over the Past 5 Years

The Dutch agricultural sector benefits from Holland’s mild climate, fertile soil and favorable geographical location in Europe. Expertise, infrastructure, the food processing industry, commerce and logistics are all advanced in the Netherlands.

Agri-business is one of the driving forces behind the Dutch economy and makes up approximately 10 percent of the Dutch economy. The sector has a strong international focus and accounts for almost 15 percent of the Netherlands’ total export value.

Due to its large and sophisticated processing industry, the Netherlands increasingly depends on stable supplies of bulk, intermediate and also consumer oriented products (e.g. grains, seafood, fresh produce, nuts, meat, specialty products, etc.) from other EU member states and third countries.

The Netherlands continues to be a leading trading nation; it is after the U.S. and Germany the largest exporter and the 6th largest importer of agricultural products in the world. Belgium is after the 9th largest exporter and the 9th largest importer of agricultural products in the world.

Developments and Trends That Affect the HRI Industry

Because of the current crisis consumers are not spending but rather saving money and one way of doing that is cutting expenditures on eating out. If consumers go out they carefully check prices and more than ever seek value for money.

The population in the Benelux is graying. The age groups 55-75 years old are quite outgoing and often enjoy a good pension. Households that have two incomes also continue to grow, especially in the age groups 25-45. Households are also becoming smaller. Finally the ethnic minority groups continue to grow. All developments offer new opportunities for entrepreneurs in the foodservice industry.

Industry analysts believe the Benelux foodservice sector is entering a new phase of development and it is generally believed that within the next two decades, the industry profile will change to accommodate fewer small operators and more medium and large establishments. Industry shakeups will occur, with more mergers and acquisitions or strategic alliances, and branding success. In addition, there is still growth for unique, independent, high-end restaurants.
Lines between Out-Of-Home and At-Home are blurring. Leading (food) retailers are increasingly offering places where customers can enjoy the food they just bought or even order meals. At the same time traditional foodservice outlets are tapping into the retail market by selling specialty products for At-Home. Some of the retailers that have entered the foodservice market and claimed prominent positions include V&D, HEMA, IKEA, Makro and Jumbo.

Consumer tastes are becoming more international. The number of Indian, Thai and Indonesian outlets continues to grow. Strict eating times are changing, leading to an increasing in snacking on the go. Finally consumers are moving to healthier eating habits, while sustainability is used to meet the consumers’ concerns about environment, obesity and animal welfare.

On-line shopping offers potential for food products albeit the market currently is still very small (around 1 percent). It especially offers opportunities for the food retail market, for more information please read the following GAIN report NL2014.

Advantages and Challenges

**Sector Strengths & Market Opportunities:**
- The industry is very fragmented (often family run businesses) and can therefore adjust itself easily to the changing consumer demands.
- The Benelux consumer is curious and wants to try new things; this creates opportunities for new products and service concepts.
- U.S. products enjoy a positive image among the Dutch and Belgian population.
- When compared to the U.S. and some European markets, the Benelux foodservice industry has the opportunity to enhance its share of total food sales.
- The majority of the Benelux foodservice industry is indifferent about sustainability certification.

**Sector Weaknesses & Competitive Threats:**
- The current economic crisis is expected to continue to hit the foodservice hard.
- The small cafés that are especially affected greatly by the smoking ban face an uncertain future.
- Strict import regulations, including the labeling requirements.
- Competition from many ethnic restaurants, including, Italian, Indonesian, Chinese, Spanish, Thai, etc.
- In general the margins on food at foodservice outlets are thin, the margins on beverages (including wines and beer) are much better.

Section II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

Prior to any export, FAS/The Hague suggests U.S. companies invest in research analyzing the Benelux food culture (concepts, flavors, price, and product requirements). Some of the State Regional Trade Groups offer this type of research (Food Exports’ market scan and market builder program). Once the product has been chosen, be aware of fierce competition from not only EU suppliers but also those from outside the EU.
There are several tariff and non-tariff trade barriers that complicate export to the Benelux countries. An experienced and specialized importer knows the industry, the dynamics, the trade barriers and the required documentation. In addition, the Office of Agricultural Affairs in The Hague (OAA) offers guidelines on import regulations for food products that can be found on http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative_The%20Hague_Netherlands_3-8-2013.pdf (the Netherlands) and http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative_The%20Hague_Belgium-Luxembourg_3-8-2013.pdf (Belgium).

Participating in trade shows in Europe (like SIAL, Anuga, ESE, etc.) is a proven way to find the right importer and also facilitates the direct contact with distributors and wholesalers. An overview of all USDA endorsed trade shows in Europe can be found at http://www.fas.usda.gov/agx/trade_events/trade_events.asp and www.usdameurope.com. U.S. cooperators often can help promoting your product in Europe, an overview of U.S. cooperators can be found at http://www.fas.usda.gov/pcd/PartnersSearch.aspx. Be aware that not all U.S. cooperators have programs for the European market.

**Market Structure**

- The Benelux fast-food sector and Catering sector are highly consolidated, dominated by a few international and national players.

**Figure 5: Leading fast-food companies in the Benelux**

<table>
<thead>
<tr>
<th>Name</th>
<th>Turnover in $\text{€}$ (2012 figures)</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonalds</td>
<td>854</td>
</tr>
<tr>
<td>Burger King</td>
<td>115</td>
</tr>
<tr>
<td>Domino’s Pizza</td>
<td>68</td>
</tr>
<tr>
<td>New York Pizza</td>
<td>57</td>
</tr>
<tr>
<td>Febo</td>
<td>46</td>
</tr>
</tbody>
</table>

Source: Misset Horeca

**Figure 6: Leading caterers in the Benelux**

<table>
<thead>
<tr>
<th>Name</th>
<th>Turnover in $\text{€}$ (2012 figures)</th>
</tr>
</thead>
</table>

$^2 1$\text{¥}=0.758\text{€}
1. Sodexo
2. Albron
3. Compass Group
4. Paresto
5. Vermaat Group
6. Jaarbeurs Catering Services
7. Koninklijke Van Den Boer Group
8. Hutten Catering
9. Prorest Catering
10. OSP Catering

Source: Misset Horeca

- Except for the hotel en restaurant chains, most other consumer foodservice sub-sectors are highly fragmented. Often restaurants and more so cafés are independently operated companies with their own purchase patterns and buyers.
- As the chart on the next page indicates, small and independent entrepreneurs buy their products and ingredients from wholesaler/distributors. There are approximately 10 wholesalers in the Benelux. The leading ones are indicated below.

Figure 7: Leading wholesalers/distributors in the Benelux
- Deli XL
- Hanos
- ISPC
- Hocras
- Kweker
- Sligro
- Makro/Metro
- Kruidenier
- MAXXAM/VHC

Source: FAS/The Hague

Figure 8: Distribution Channel Flow Diagram

- Some companies in the foodservice industry purchase imported products directly from specialized importers but in general they buy via wholesalers or local suppliers.
- Fast-food companies are frequently part of a large chain with national, regional or global presence. Products are delivered through proprietary distributors, who normally purchase products for all franchisees.

3 1$=0.758€
Due to its consolidated structure, the Benelux catering sector has a limited number of dedicated distributors. Distributors buy directly from producers. Non-EU products are bought through importers.

Independent restaurants, bars and takeaways buy fresh products (meat, seafood, dairy products, bread and fruits & vegetables) often from local suppliers who in some cases produce those products themselves. These relationships are in most cases personal relationships between the owner of the restaurant and the supplier. For all other products (and non-food) the independent owner generally goes to a wholesaler, except for beer, wine and soft drinks which are delivered. Wholesalers try to become a one-stop-shop point for their clients by expanding specifically in fresh products and beverages.

For bigger restaurants and/or restaurant chains, there are different players in the supply chain. Local suppliers are not competitive and are replaced directly by wholesalers and distributors.

### Sub Sectors Profiles

#### Top 10 largest foodservice companies in the Netherlands

<table>
<thead>
<tr>
<th>Name</th>
<th>Turnover in $4 (2012 figures)</th>
<th>Sub sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  McDonalds</td>
<td>854</td>
<td>Fast food</td>
</tr>
<tr>
<td>2  Van Der Valk</td>
<td>711</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>3  NS Station Retail bedrijf</td>
<td>455</td>
<td>Street stalls/Kiosks</td>
</tr>
<tr>
<td>4  Landal Greenpark</td>
<td>346</td>
<td>Full service restaurants</td>
</tr>
<tr>
<td>5  La Place (V&amp;D)</td>
<td>297</td>
<td>Self service cafeteria</td>
</tr>
<tr>
<td>6  NH Hotels</td>
<td>292</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>7  Accor Hotels</td>
<td>286</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>8  Hampshire hospitality</td>
<td>261</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>9  Louvre Hotel group</td>
<td>198</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>10 Best Western</td>
<td>156</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>11 HMS host Schiphol</td>
<td>139</td>
<td>Self service cafeteria</td>
</tr>
<tr>
<td>12 Fletcher Hotels</td>
<td>132</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>13 Intercontinental Hotels</td>
<td>132</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>14 Hilton Hotels</td>
<td>117</td>
<td>Hotel/full service restaurants</td>
</tr>
<tr>
<td>15 Burger King</td>
<td>115</td>
<td>Fast food</td>
</tr>
</tbody>
</table>

Source: Misset Horeca

### 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.

#### Figure 9: competition, the Netherlands

<table>
<thead>
<tr>
<th>Product Category, Major Supply Sources</th>
<th>Strengths of Key Supply Countries</th>
<th>Advantages and Disadvantages of local suppliers</th>
</tr>
</thead>
</table>

\[1\text{S}=0.758\text{€}\]
<table>
<thead>
<tr>
<th>Category</th>
<th>Total Imports:</th>
<th>Origin</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wine</td>
<td>1,114 million $</td>
<td>France (38%)</td>
<td>Good quality Export tradition/experience Proximity Popular holiday destination</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Germany (10%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Spain (9%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Italy (8%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>USA (3%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>No real commercial availability in the Benelux</td>
<td></td>
</tr>
<tr>
<td>Sauces, condiments and seasonings</td>
<td>250 million $</td>
<td>Germany (25%)</td>
<td>Unique products Excellent quality/taste Availability</td>
</tr>
<tr>
<td>HS 210390</td>
<td></td>
<td>Belgium (14%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Italy (10%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>France (8%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>USA (2%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>The U.S. enjoys a good reputation, identification way-of-life, and unique products.</td>
<td></td>
</tr>
<tr>
<td>Pulses</td>
<td>91 million $</td>
<td>Russia (17%)</td>
<td>Peas in the Netherlands mainly come from Russia while the U.S. has a strong position in exporting kidney beans. Canada dominates Dutch imports of lentils</td>
</tr>
<tr>
<td>Group 48</td>
<td></td>
<td>China (16%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>USA (11%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>No or not enough local supply. The trend towards eating healthier food and experimenting with international cuisines is driving demand for pulses.</td>
<td></td>
</tr>
<tr>
<td>Tree nuts</td>
<td>763 million $</td>
<td>USA (26%)</td>
<td>The U.S. dominates the international trade in almonds and pistachios</td>
</tr>
<tr>
<td>Group 20</td>
<td></td>
<td>Vietnam (24%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>India (9%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>China (5%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>No local supply. The Dutch food processing depends on almonds from Spain and the U.S. The production in the U.S. continues to grow and increasingly supplies Europe with high and consistent quality of almonds. China, Iran and the U.S. are all suppliers of pistachios to the Dutch market.</td>
<td></td>
</tr>
<tr>
<td>Beef</td>
<td>1,913 million $</td>
<td>Germany (16%)</td>
<td>The Dutch meat processing industry and also the high-end foodservice industry depends on imports. EU suppliers benefit from proximity. The U.S., Brazil and Argentina benefit from excellent quality beef.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Poland (10%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Belgium (10%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>UK (9%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>USA (5%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dutch beef is of much lower quality than U.S. beef. The beef from the U.S. is known for its consistency in quality and cuts (famous breeds like Black Angus and Wagyu), its taste and intramuscular fat (grain fed).</td>
<td></td>
</tr>
<tr>
<td>Seafood</td>
<td>2,922 million</td>
<td>Germany (13%)</td>
<td>Iceland and to a lesser extent Russia, Norway and China are suppliers of cod; Vietnam dominates the trade in pangasius; the U.S. leads the supply of</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Iceland (12%)</td>
<td>Frozen fillets of white fish need to be sourced outside the EU. The Dutch also depend on non-EU markets for salmon, coquilles and</td>
</tr>
<tr>
<td>Product Category</td>
<td>Major Supply Sources</td>
<td>Strengths of Key Supply Countries</td>
<td>Advantages and Disadvantages of local suppliers</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------</td>
<td>-----------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Fresh fruit</td>
<td>Colombia (19%) Ecuador (12%) Costa Rica (11%) Spain (11%) USA (1%)</td>
<td>Southern hemisphere countries complement local fresh fruit production and supply product locally not available.</td>
<td>Citrus and exotic fruit are locally not available.</td>
</tr>
<tr>
<td>Wine</td>
<td>France (61%) Spain (9%) Italy (8%) Portugal (4%) USA (1%)</td>
<td>Good quality Export tradition/experience Proximity Popular holiday destination</td>
<td>No real commercial availability in the Benelux</td>
</tr>
<tr>
<td>Snack foods</td>
<td>Belgium (37%) Germany (28%) Italy (7%) UK (6%) USA (1%)</td>
<td>Unique products and excellent quality and taste</td>
<td>The U.S. offers unique and innovative products. Transportation costs and time and also EU import regulations and tariffs hamper.</td>
</tr>
<tr>
<td>Total imports:</td>
<td>1,166 million $</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresh fruit</td>
<td>South Africa (18%) Chile (11%) Spain (10%) Brazil (7%) USA (1%)</td>
<td>Southern hemisphere countries complement local fresh fruit production.</td>
<td></td>
</tr>
<tr>
<td>Total imports:</td>
<td>4,202 million $</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wine</td>
<td>France (61%) Spain (9%) Italy (8%) Portugal (4%) USA (1%)</td>
<td>Good quality Export tradition/experience Proximity Popular holiday destination</td>
<td>No real commercial availability in the Benelux</td>
</tr>
<tr>
<td>Total Imports:</td>
<td>1,247 million $</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Globe Trade Atlas

Alaska Pollack. Bangladesh and India are the Netherlands’ leading suppliers of shrimps and prawns.
<table>
<thead>
<tr>
<th>Product</th>
<th>Country of Origin</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Snack foods</strong></td>
<td><strong>Netherlands (31%)</strong></td>
<td>Unique products and excellent quality and taste</td>
</tr>
<tr>
<td><strong>Imports:</strong> 1,378 million $</td>
<td>France (23%)</td>
<td>The U.S. offers unique and innovative products.</td>
</tr>
<tr>
<td></td>
<td>Germany (20%)</td>
<td>Transportation costs and time and also EU import regulations and tariffs hamper.</td>
</tr>
<tr>
<td></td>
<td>Italy (7%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UK (4%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USA (1%)</td>
<td></td>
</tr>
<tr>
<td><strong>Pulses</strong></td>
<td><strong>France (44%)</strong></td>
<td>Imports from France and Netherlands are re-exports. Peas in Belgium mainly come from China while the U.S. has a strong position in exporting kidney beans. Canada dominates imports of lentils.</td>
</tr>
<tr>
<td><strong>Group 48</strong></td>
<td><strong>Netherlands (13%)</strong></td>
<td>No or not enough local supply. The trend towards eating healthier food and experimenting with international cuisines is driving demand for pulses.</td>
</tr>
<tr>
<td><strong>Total Imports:</strong> 88 million $</td>
<td>Canada (10%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>China (10%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USA (4%)</td>
<td></td>
</tr>
<tr>
<td><strong>Tree nuts</strong></td>
<td><strong>USA (29%)</strong></td>
<td>The U.S. dominates the international trade in almonds and pistachios.</td>
</tr>
<tr>
<td><strong>Group 20</strong></td>
<td><strong>Netherlands (16%)</strong></td>
<td>No local supply. The Belgian food processing depends on almonds from Spain and the U.S. The production in the U.S. continues to grow and increasingly supplies Europe with high and consistent quality of almonds. The U.S. is also a leading supplier of pistachios to the Dutch market.</td>
</tr>
<tr>
<td><strong>Total Imports:</strong> 364 million $</td>
<td>Turkey (9%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>France (7%)</td>
<td></td>
</tr>
<tr>
<td><strong>Sauces, condiments and seasonings</strong></td>
<td><strong>Netherlands (32%)</strong></td>
<td>Unique products Excellent quality/taste Availability</td>
</tr>
<tr>
<td><strong>HS 210390</strong></td>
<td>France (18%)</td>
<td>The U.S. enjoys a good reputation, identification way-of-life, and unique products.</td>
</tr>
<tr>
<td><strong>Total Imports:</strong> 160 million $</td>
<td>Germany (15%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>UK (7%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Italy (7%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USA (2%)</td>
<td></td>
</tr>
<tr>
<td><strong>Beef</strong></td>
<td><strong>Netherlands (26%)</strong></td>
<td>The Belgian meat processing industry and also the high-end foodservice industry depends on imports. EU suppliers benefit from proximity. The U.S., Australia and New Zealand benefit from excellent quality beef.</td>
</tr>
<tr>
<td><strong>Total Imports:</strong> 386 million $</td>
<td>France (20%)</td>
<td>Local beef is of much lower quality than U.S. beef. The beef from the U.S. is famous for its consistency in quality and cuts (known breeds like Black Angus and Wagyu), its taste and intramuscular fat (grain fed).</td>
</tr>
<tr>
<td></td>
<td>Ireland (13%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Germany (12%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>USA (2%)</td>
<td></td>
</tr>
</tbody>
</table>
Section IV. BEST PRODUCT PROSPECTS

Products that meet one or more of the following criteria have the best prospect to be sold on the Dutch and Belgian market. 1. Products (innovative, price, packaging, taste, size) that are unique to the U.S.; 2. Products those are not sufficiently available in the Benelux market and 3. Products that are available during the off season in the Benelux (often fresh products).

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, etc.;
- Fresh fruit and vegetables: sweet potatoes, grapefruit, Minneola, cranberries, etc.;
- Fruit juice concentrates: orange juice, cranberry, grapefruit;
- Sauces, snacks and condiments;
- Bourbons and orange bitter;
- California wines;

Products Not Present in Significant Quantities, but Which Have Good Sales Potential
- Wines from other States;
- Dried peas and lentils;
- Micro breweries’ beers;
- Healthy food, organic food and sustainable food;
- Sweet corn;
- Guavas and cherries;

Products Not Present Because They Face Significant Barriers
- Specialty products containing GMO derived ingredients;

Figure 11: Table Best Product Prospects for the Netherlands

<table>
<thead>
<tr>
<th>Product category</th>
<th>Total Netherlands imports, $ million</th>
<th>Netherlands imports from the U.S., $ million</th>
<th>2008-2012 Average annual import growth</th>
<th>Key constraint over market development</th>
<th>Market attractiveness for U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snack foods</td>
<td>1,166</td>
<td>15</td>
<td>25 %</td>
<td>Competition from suppliers from EU countries. Transportation costs/time, EU import tariffs, and GMO contents.</td>
<td>Unique products, excellent quality and taste.</td>
</tr>
<tr>
<td>Beef</td>
<td>1,913</td>
<td>98</td>
<td>31 %</td>
<td>Competition from South America, Australia/New Zealand and Ireland. Price, EU import</td>
<td>Strong demand in high-end HRI industry. Growing awareness at mainstream HRI</td>
</tr>
</tbody>
</table>
requirements and unfamiliarity of less familiar cuts.

<table>
<thead>
<tr>
<th>Product category</th>
<th>Total Belgian imports, $ million</th>
<th>Belgian imports from the U.S., $ million</th>
<th>2008-2012 Average annual import growth</th>
<th>Key constraint over market development</th>
<th>Market attractiveness for U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh vegetables</td>
<td>1,822</td>
<td>3</td>
<td>11 %</td>
<td>Unfamiliarity how and when to use sweet corn and sweet potatoes.</td>
<td>The U.S. provides consistent and good quality vegetables.</td>
</tr>
<tr>
<td>Tree nuts</td>
<td>763</td>
<td>201</td>
<td>11 %</td>
<td>The U.S. dominates the market</td>
<td>Strong demand from the food processing and snack industry.</td>
</tr>
</tbody>
</table>


**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 Agricultural Specialist at the U.S. Office of Agricultural Affairs in The Hague, the Netherlands:
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