

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Netherlands

Retail Foods

Benelux Food Retail Market

Approved By:

Stephen Huete

Prepared By:

Marcel Pinckaers

Report Highlights:

Despite the current economic situation, the turnover of the Benelux food retail market in 2009 was €52.7 billion, 4.4% higher than previous year. In addition, the food retail market continues to consolidate further.

Post:

The Hague

Author Defined:

Section I. Market Summary

Benelux Food Retail Market

Approximately 80 percent of the Dutch food retail outlets are full service supermarkets, operating on floor space between 500 and 1,500 square meters located downtown and in residential areas. The remaining 20 percent includes superstores located in industrial parks, convenience stores near human traffic and department stores. In Belgium, full service supermarkets, like Colruyt and AD Delhaize, account for an estimated 75 percent of the market. The share of superstores and convenience stores in Belgium is higher than in the Netherlands, an estimated 25%. In Luxembourg, full service supermarkets like Cactus, Alvo and Match dominate the market as well. In all three markets, independent food retail stores are increasingly leaving the scene. On-going consolidation in the retail market, changing consumer demands and shrinking margins seem to drive this trend.

The top 3 biggest retailers in the Netherlands, Albert Heijn, C1000, and Jumbo [1], have a market share of 56 percent. The market for discounters like Aldi and Lidl has stabilized around 15%. Also discounters like Bas van der Heijden, Dirk van den Heijden and Digros were able to maintain their share of the market. In Belgium, the leading 3 retailers have 75 percent of the market. The market share of the discounters in Belgium is about 40% where Colruyt saw its market share growing at the expense of Aldi and Lidl. Recent market share figures for Luxembourg were not available when writing the report.

Table 1: Market Shares of Leading Food Retailers in 2010

Netherlands		Belgium		Luxembourg	
Company Name	Market Share	Company Name	Market share	Company Name	No. of Stores
Albert Heijn	31.1%	Carrefour	29.0%	Delhaize	30
C1000	14.9%	Delhaize	25.0%	Cactus	18
Jumbo	9.9%	Colruyt	23.5%	Match	14
Aldi	8.5%	Aldi	12.5%	Alvo	11
Plus	6.1%	Lidl	4.0%	Smatch	8
Lidl	5.5%	Louis Delhaize	3.0%	Cora	2
Other	23.8%	Other	3.0%	Auchan	1
Total	100.0%	Total	100.0%		

Source: USDA estimates

Higher Prices For Food Products

The turnover of the Benelux food retail industry in 2009 was an estimated €52.7 billion (€31.1 billion in the Netherlands, €21.1 billion in Belgium and €0.5 billion in Luxembourg). For 2010,

turnover is expected to increase by 1.5%. Reasons for this moderate growth:

- Expected moderate increase of the unemployment rate
- Limited economic growth
- Consumers plan to spend more food euros at retail than foodservice
- Due to the current economic situation the growth of value-added products has decreased at the expense of more basic products

Table 2: Turnover Benelux food retail, past 5 years

2005	2006	2007	2008	2009
€ 44.1 billion	€ 45.7 billion	€ 47.7 billion	€ 50.5 billion	€ 52,7 billion

The trend of higher prices for raw materials and therefore consumer products, as discussed in the previous Food Retail report, seems to have stopped. Benelux consumer prices rank among the cheapest within the EU-27.

Changing Consumer Needs

In addition to the fact that Benelux consumers are shedding retailer-loyalty, they shop at different times and locations. During lunch breaks, people buy their lunch and often the ingredients for that evening's meal. Small convenience stores, like "AH To Go" and "Delhaize shop 'n go" are opened at locations near heavy traffic like train stations, schools, and shopping malls to satisfy these consumers' needs.

The traditional neighborhood grocery stores are either going out of business, are taken over or are changing their product portfolio. They are expanding the grocery line of fresh and convenient prepared-foods with tailor-made sandwiches, filled tortillas and drinks to satisfy the consumers' need for "food for now". The ready-to-cook segment is also expanding.

Awareness of Health and Well-Being

Consumers are becoming more aware of and are more concerned about the effects food has on their health and well-being. There is a trend to a healthier lifestyle in Western countries. The following US industries have all benefitted from this trend: nuts (like pistachios, almonds, walnuts, etc.), fruits (like cranberries, pomegranates, berries, etc.), seafood (like salmon, halibut, etc.). Consumers are more cautious about foodborne illnesses.

Consumers are looking for and finding more information on this topic; the media, including the Internet, TV and magazines, respond to this desire and feed into it. Food processors and retailers play a crucial role as well, as they develop and market food products (like juices from POMwonderfull, Healthy People, etc.) to create, anticipate and meet consumers' needs.

Climate Change – Carbon Footprint Labeling

Last year the European Commission conducted a survey on mandatory Carbon Footprint Labeling (CFL). Popular support for CFLI by country, varied between 47% to 90% of all 27,000 Europeans that were interviewed. Seventy percent of the respondents in Belgium and Luxemburg were supportive of a mandatory label whereas this was only supported by half of the Dutch interviewees. The latter, on the other hand, were after the Finnish the most likely (28%) to prefer a voluntary labeling system. The outcome of the survey can be found at http://ec.europa.eu/environment/eusss/pdf/FL256_analytical%20report_final.pdf

After the December 2009 U.N. Climate Change Conference in Copenhagen, the discussion on CFL got a new boost. Belgian federal Minister of Climate and Energy, Mr. Paul Maignette, stated that in addition to the price, the CO2 emission should also be mentioned on each product. This way, consumers become aware and see to what extent the products they buy influence global warming.

Carbon Footprint Labeling is not (yet) an issue in the Netherlands. The government hasn't come out with a statement or position on CFL. It seems that all the individual stakeholders are waiting for the other to make the first move.

Within the EU-27, the U.K. and Sweden are taking a leading role in CFL. For more information on Sweden, see GAIN Report SW9016. The overall labeling requirements for the Benelux can be found in the following GAIN Reports: NL9020 and GAIN BE9004.

Advantages and Challenges of the Benelux Food Retail Market

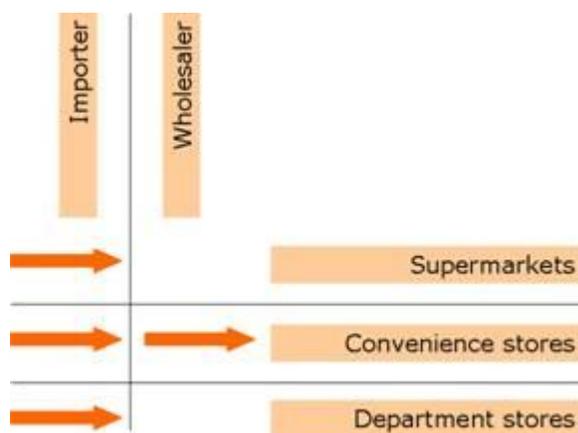
<u>Advantages</u>	<u>Challenges</u>
<i>Sector Strengths & Market Opportunities:</i>	<i>Sector Weaknesses and Competitive Threats:</i>
Expected slight recovery of the economy in the Benelux is a promising prospect (especially compared to some other EU economies) for the retail industry.	EU import regulation and tariffs. EU enlargement has given and will give preferential access to products from new member countries.
Affluent, open minded and curious consumers create opportunities for new products.	Discounters are the fastest growing segment in the Benelux retail market; margins continue to be under pressure.
The region has an excellent infrastructure which offers great opportunities.	Competition is growing from non-food retail players like IKEA, HEMA, V&D and Bijenkorf as they enter the food market.
Greater demand for healthy food products not or not sufficiently available on the local EU market; e.g. seafood, tree nuts, (exotic) fruit, vegetables, juices,	The industry is highly consolidated and therefore has a strong negotiating position and good contacts.

Section II. Road Map For Market Entry

Entry Strategy

Success in introducing your product in the Benelux market depends mainly on knowledge of the market and building personal contact with knowledgeable and established importers. Prior to any export, invest in research that analyzes the Benelux food culture (concepts, flavor, price, requirements). Once the product has been chosen, be aware of fierce competition. There are tariff and non-tariff trade barriers that can complicate exporting to the Benelux. An importer knows the market, the trade barriers and the required documentation. The Office of Agricultural Affairs (OAA) offers guidelines on business practices and import regulations. For a complete overview of offered reports, see Section V of this report.

Market Structure



Supermarkets and Superstores

The vast majority of supermarkets and superstores buy foreign (specialty) products via specialized importers. This is especially the case for retail-ready consumer-oriented products like sauces, beverages and snack products. Convenience stores operate, in general, on a much smaller scale and therefore buy smaller quantities through wholesalers. Department stores work either through importers or buy directly from third countries' exporters. Many imported intermediate and even some consumer-oriented products are often processed before being sold to the consumer. Products like nuts, fresh produce, in some cases fish and wine would fall in this category.

Retailers increasingly have their stores divided in different categories. For each category they will have 2 or 3 preferred suppliers who are responsible for supplying the full range of products within the category. This way, the retailer negotiates with just a handful of suppliers for supplying fruits & vegetables, meat products, seafood products, drinks, bakery products, etc. For the international specialty products area within supermarkets, retailers usually work with a few specialized importers who are responsible for composing and filling those shelves.

As described in Section I, the retail industry in the Benelux is rather consolidated; however, on the purchase side the industry is even more consolidated since several smaller retailers have joined forces. As a result, they have been able to increase their bargaining power. The following figures will give you an overview of the different buying combinations in the Netherlands and Belgium.

Table 3: Leading Buying Groups in The Netherlands, 2010

Purchase Group:	Market Share:	Company name:
Albert Heijn Provincialeweg 11 1506 MA Zaandam www.ah.nl	31.3%	Albert Heijn
Superunie Industrieweg 22B 4153 BW Beesd www.superunie.nl	29.9%	PLUS, Jan Linders, Vomar, Spar, DeKamarkt [2] , Coop, Hoogvliet, Golff, Dirk van de Broek, Bas van der Heijden, Digros, etc.
Bijeen [3] Databankweg 26 3821 AL Amersfoort www.schuitema.nl Rijksweg 15 5462 CE Veghel www.jumbosupermarkten.nl	24.8%	C1000, Jumbo, Super de Boer
Aldi Erasmusweg 3 AK Culemborg www.aldi.nl	8.5%	Aldi
Lidl P.O. Box 198 1270 AD Huizen www.lidl.nl	5.5%	Lidl

Source: AC Nielsen/USDA estimates

Table 4: Leading Buying Groups in Belgium, 2010

Purchase Group	Market Share	Store name
Carrefour Olympiadenlaan 20 B-1140 Brussels www.carrefourbelgium.be	29.0%	Mestdagh/Champion
Delhaize Group Osseghemstraat 53 B-1080 Brussels www.delhaizegroep.com	25.0%	AD Delhaize, Delhaize City, Proxy Delhaize, Delhaize Supermarket and Shop 'n Go,
Colruyt Steenweg op Edingen 196 B-1500 Halle www.colruyt.be	23.5%	Colryt, Bio Planet, Spar, Alvo and OKay
Aldi Keerstraat 4 B-9420 Erpe-Mere www.aldi.be	12.5%	Aldi
Louis Delhaize Group Purchaser; Provera Belux Av. J. Mermoz 22 B-6041 Gosselies www.supermarche-match-supermarkt.be	6.0%	Louis Delhaize, Cora Belux, Louis Delhaize De Kruidernier (grocer), Delitrateur and Match,
Lidl Guldensporenpark 90 blok J B-9820 Merelbeke www.lidl.be	4.0%	Lidl

Source: AC Nielsen/USDA estimates

Table 5: Supermarkets and Super Stores

Name	Format	Ownership	Locations
Netherlands			
Albert Heijn	Supermarket	Royal Ahold	Nation wide
Jan Linders	Supermarket	Jan Linders	Regional
C1000	Supermarket	Schuitema	Nation wide
Jumbo	Super Stores	Jumbo	Nation wide
Plus	Supermarket	Sperwer Groep	Nation wide

Coop	Supermarket	CoopCodis	Nation wide
Jumbo XL [4]	Super Stores	Jumbo	Nation wide
C1000	Super Stores	Schuitema	Nation wide
AH XL	Super Stores	Royal Ahold	Nation wide

Belgium

AD Delhaize	Supermarket	Delhaize Group	Nation wide
Alvo Supermarkt	Supermarket	Colruyt	Nation wide
Bio Planet (Organic)	Supermarket	Colruyt	Nation wide
Colruyt	Supermarket	Colruyt	Nation wide
Delhaize City	Supermarket	Delhaize Group	Nation wide
Delhaize Proxy	Supermarket	Delhaize Group	Nation wide
Eurospar	Supermarket	Colruyt	Nation wide
GB Contact	Supermarket	Carrefour	Nation wide
Match	Supermarket	Louis Delhaize Group	Nation wide
O'Cool	Supermarket	Frost Invest	Nation wide
Okay	Supermarket	Colruyt	Nation wide
Profi	Supermarket	Louis Delhaize Group	Nation wide
Smatch	Supermarket	Louis Delhaize Group	Nation wide
Spar Supermarkt	Supermarket	Colruyt	Nation wide
Carrefour	Super Stores	Carrefour	Nation wide
Cora Belux	Super Stores	Louis Delhaize Group	Nation wide
Delhaize Supermarkt	Super Stores	Delhaize Group	Nation wide
Carrefour Hyper	Super Stores	Carrefour	Nation wide

Supermarket - retail surface ≤ 1,500 m2

Super Stores - retail surface > 1,500 m2

Discounters

Table 6: Discounters

Name	Ownership	Locations
Netherlands		
Aldi	Aldi-Gruppe	Nation wide
Lidl	Lidl & Schwarz	Nation wide
Dirk van de Broek	Dirk van de Broek	Nation wide
Bas van der Heijden	Bas van der Heijden	Nation wide
Digros	Digros	Nation wide
Belgium		
Colruyt	Colruyt	Nation Wide
Aldi	Aldi Inkoop	Nation Wide
Lidl	Lidl Belgium GmbH & Co KG	Nation Wide
Tecno	Tecno N.V.	Regional

Department Stores

Table 7: Department Stores

Name	Ownership	Locations
Netherlands		
Bijenkorf	Lion Capital LLP (UK)	Nation wide

HEMA V&D	Lion Capital LLP (UK) Maxeda (NL)	Nation wide Nation wide
Belgium		
HEMA Inno	Lion Capital LLP (UK) GALERIA INNO/ Kaufhof A.G.	Nation wide Nation wide

Convenience Stores, Gas Marts and Kiosks

Table 8: Convenience Stores

Name	Ownership	Locations
Netherlands		
AH To Go	Royal Ahold	Regional
Belgium		
Delitrateur	Louis Delhaize Group	Nation wide
Louis Delhaize	Louis Delhaize Group	Nation wide
Louis Delhaize Kruidenier	Louis Delhaize Group	Regional
Night & Day	Night & Day Presse	Regional
White Night	Louis Delhaize Group	Regional

"AH to go" are situated at train stations, busy shopping streets and business districts, products sold are ready to eat meals, and other meal components or snacks.

Source: AC Nielson

Table 9: Gas Marts

Name	Ownership	Gas Company	Locations
Netherlands			
On the Run/Snack & Shop	ExxonMobil	Esso	Nation wide
Shell Station	Shell	Shell	Nation wide
Texaco Servicestations	Chevron	Texaco	Nation wide
Wild Bean Cafe	British Petroleum	BP	Nation wide
Café Bonjour	Total	Total	Nation wide
AH To Go	Royal Ahold	Shell	Nation wide
Belgium			
Delhaize Shop 'n Go	Delhaize Group	Q8	Nation wide
Shell Station	Shell	Shell	Nation wide
On the Run/Snack & Shop	ExxonMobil	Esso	Nation wide
Texaco Stations	Chevron	Texaco	Nation wide
Total Shop/Café Bonjour	Total	Total	Nation wide

Source: AC Nielson

Kiosks

Independent small shops dominate food outlets at train stations.

Traditional Outlets

Grocery stores, butcher stores, bakeries etc. are still popular in the Netherlands although

increasingly they face competition from food retailers. Through extra service, sales of high-quality added value products and the serving of niche markets, they try to survive.

Section III. Competition

Knowledgeable and experienced traders, excellent logistics, a highly sophisticated processing industry, a professional distribution channel and affluent consumers make the Benelux an attractive export market.

The Benelux is (except for several horticultural products) in general not the most competitive producer of bulk products, due to the high prices for agricultural land and labor, lack of scale, animal welfare and multiple rules and regulations. The Benelux however has a highly sophisticated processing industry. As a result, the Benelux increasingly is dependent on stable supplies of bulk and intermediate products (like grains, seafood, fruit juices, fresh produce, nuts, meat, etc.) from other EU member states and third countries. In addition to sufficiency, the Benelux also depends on other countries, especially Southern Hemisphere countries, for the year-round availability of fresh fruit and certain vegetables. Another reason why importers and food distributors turn to foreign markets is to look for unique products. This can be both new products and well-known products that are different one way or another. U.S. cranberries, grapefruits, pistachios, sweet potatoes, and a full range of specialty food products have gained popularity over the years.

Table 10: Netherlands' U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented and Fish & Seafood Products, (value in million US \$), 2008

Product Category	Main Suppliers Including %	Strengths of Key Countries	Advantages and Disadvantages of Local Suppliers
HS 02: Meat and Edible Meat Offal			
Total Imports US\$ 4,511	1. Germany 26.9 2. Belgium 16.7 3. Brazil 14.5 15. U.S. 1.0	1,2: distance and availability 3: price/quality ratio	Focus on dairy production instead of beef production
HS 03: Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates			
Total Imports US\$ 2,507	1. Iceland 15.7 2. Germany 11.9 3. Denmark 8.5 9. U.S. 3.5	1,3: great variety due to geographical location 2: big processing industry	tradition in seafood trading; Good geographical location
HS 04: Dairy Produce; Birds' Eggs; Natural Honey			
Total Imports US\$ 3,883	1. Germany 44.2 2. Belgium 15.7 3. France 10.9 12. U.S. 1.9	1,2,3: Proximity	Great tradition of producing milk and milk based processed products
HS 07: Edible Vegetables And Certain Roots And Tubers			

Total Imports	US\$ 2,702	1. Spain 26.2 2. Belgium 14.7 3. Germany 12.9 16. U.S. 0.9	1: different climate/supply season 2,3: proximity	Great innovative industry producing horticultural products
HS 08: Edible Fruit And Nuts; Peel Of Citrus Fruit Or Melons				
Total Imports	US\$ 5,870	1. S. Africa 13.8 2. Chile 11.5 3. Belgium 8.5 9. U.S. 3.6	1,2: different climate/supply season/taste/varieties	A mature industry (especially apples and pears)
HS 09: Coffee, Tea, Mate And Spices				
Total Imports	US\$ 861	1. Germany 21.4 2. Belgium 18.2 3. Switzerland 7.7 31. U.S. 0.3	2: trade	No domestic availability
HS 16: Edible Preparations of Meat, Fish, Crustaceans, Molluscs or other Aquatic Invertebrates				
Total Imports	US\$ 1,932	1. Brazil 25.1 2. Belgium 15.3 3. Germany 14.4 20. U.S. 0.6	3: price / quality ratio	No domestic availability
HS 19: Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares				
Total Imports	US\$ 1,777	1. Germany 32.5 2. Belgium 31.4 3. France 9.8 13. U.S. 0.7	Proximity and re-export	No domestic availability
HS 20: Preparations Of Vegetables, Fruit, Nuts, Or Other Parts Of Plants				
Total Imports	US\$ 3,047	1. Brazil 19.0 2. Germany 15.6 3. Belgium 11.2 8. U.S. 3.4	Price / quality ratio	No domestic availability
HS 21: Miscellaneous Edible Preparations				
Total Imports	US\$ 1,826	1. Germany 26.2 2. Belgium 16.3 3. France 8.0 4. U.S. 7.9	Proximity and re-export	No domestic availability
HS 22: Beverages, Spirits and Vinegar				
Total Imports	US\$ 4,086	1. France 23.6 2. Germany 19.6 3. Belgium 12.7 8. U.S. 1.8	Excellent regional products	No domestic availability

Source: www.gtis.com

Table 11: Belgium's U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented and Fish & Seafood Products, (value in million US \$), 2008

Product Category	Main Suppliers	Strengths of Key Countries	Advantages and Disadvantages of Local Suppliers
HS 02: Meat and Edible Meat Offal			

Total Imports	US\$ 1,793	1. France 21.3 2. Netherlands 20.0 3. N. Zealand 16.3 18. U.S. 0.7	1,2: distance and availability 3: excellent price/quality ratio	Good domestic availability of beef
HS 03: Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates				
Total Imports	US\$ 1,715	1. Netherlands 23.5 2. France 8.1 3. Bangladesh 7.5 16. U.S. 1.6	1,2: big traders within the industry	tradition in seafood trading; good geographical location
HS 04: Dairy Produce; Birds' Eggs; Natural Honey				
Total Imports	US\$ 3,629	1. Netherlands 32.1 2. France 29.2 3. Germany 20.3 17. U.S. 0.2	1,2,3: Proximity	Great tradition of producing milk and milk based processed products
HS 07: Edible Vegetables And Certain Roots And Tubers				
Total Imports	US\$ 1,805	1. Netherlands 34.4 2. France 24.0 3. Spain 11.4 15. U.S. 0.8	3: different climate/supply season 1,2: proximity	Great innovative industry producing horticultural products
HS 08: Edible Fruit And Nuts; Peel Of Citrus Fruit Or Melons				
Total Imports	US\$ 4,385	1. Colombia 16.0 2. Costa Rica 14.5 3. Ecuador 8.5 9. U.S. 3.8	1,2,3: different climate/supply season/tastes/varieties	A mature industry (especially apples and pears)
HS 09: Coffee, Tea, Mate And Spices				
Total Imports	US\$ 1,356	1. Brazil 20.0 2. Vietnam 11.6 3. Germany 7.6 42. U.S. 0.2	2: availability	No domestic availability
HS 16: Edible Preparations of Meat, Fish, Crustaceans, Molluscs or other Aquatic Invertebrates				
Total Imports	US\$ 1,167	1. Netherlands 25.2 2. Germany 22.4 3. France 21.4 29. U.S. 0.2	Proximity and re-export	No domestic availability
HS 19: Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares				
Total Imports	US\$ 1,720	1. France 33.9 2. Netherlands 22.0 3. Germany 21.0 12. U.S. 0.5	Proximity and re-export	No domestic availability
HS 20: Preparations Of Vegetables, Fruit, Nuts, Or Other Parts Of Plants				
Total Imports	US\$ 1,952	1. Brazil 28.9 2. France 17.4 3. Netherlands 14.9 12. U.S. 0.9	1: price / quality ratio	No domestic availability
HS 21: Miscellaneous Edible Preparations				

Total Imports	US\$ 1,151	1. Netherlands 28.5 2. France 24.6 3. Germany 20.4 6. U.S. 2.3	Proximity and re-export	No domestic availability
HS 22: Beverages, Spirits and Vinegar				
Total Imports	US\$ 3,611	1. France 61.7 2. Netherlands 8.6 3. Germany 7.8 15. U.S. 0.6	1,3: Excellent regional products	No domestic availability

Source: www.gtis.com

Section IV. Best Products Prospects

A. Products Present In The Market That Have Good Sales Potential

- Peanuts and tree nuts
- Fruit juices
- Processed fruit and vegetables
- Beverages
- Fruits containing high levels of antioxidants like cranberries, pomegranates, berries, etc.
- Wines

B. Products Not Present In Significant Quantities But Which Have Good Sales Potential

- Dried fruits
- Functional/health foods
- High Value beef cuts and hamburgers (only Non-Hormone Treated Cattle)
- Innovative sauces, beverages and condiments

C. Products Not Present Because They Face Significant Barriers

- Red meat and meat preparations (hormone ban)
- Poultry (sanitary procedures)
- Processed food (with GMO ingredients, bleached flour etc.,)

Section V. Post Contact and Further Information

United States Department of Agriculture Foreign Agricultural Service

Mr. Marcel Pinckaers at the U.S. Embassy

Lange Voorhout 102, 2514 EJ The Hague, The Netherlands

Phone: +31 (0)70 3102.305

Fax: +31 (0)70 365.7681

E-mail: agthehague@fas.usda.gov

For more information on exporting U.S. Products to the Benelux, please contact Mr. Marcel Pinckaers at marcel.pinckaers@fas.usda.gov or +31 (0)70 3102.305 or visit the FAS website at www.fas.usda.gov and www.usembassy.nl/fas.html.

Further information on the Benelux retail market is available from:

Netherlands:

Dutch Food Retail Association (CBL)
Postbus 262
2260 AG Leidschendam, the Netherlands
Phone: +31 70 3376200
Fax: +31 70 3176887
www.cbl.nl
miranda.boer@cbl.nl

Belgium:

Belgian Federation for the Distribution (FEDIS)
Edmond van Nieuwehuyselaan 8
1160 Brussels, Belgium
Phone: +32 2 7880500
Fax: +32 2 7880501
www.fedis.be
info@fedis.be

Related reports from FAS Post in the European Union:

Country	Title	Date	Report Number
EU-27	Potato Products Report	2009	E49094
Belgium	FAIRS Report	2009	BE9004
Netherlands	FAIRS Report	2009	NL9020
Benelux	Exporter Guide	2009	NL9015
Netherlands	Fishery Report	2009	NL9008
Benelux	HRI report	2009	NL9002
Netherlands	Specialty Foods Report	2007	NL7021
Benelux	Beef Report	2007	NL7008
Benelux	Tree Nuts Report	2007	NL7002
Austria	Retail Report	2008	AU8015
France	Retail Report	2009	FR9016
UK	Retail Report	2009	UK----
Czech Republic	Retail Report	2009	EZ9010

The GAIN Reports can be downloaded from the following FAS website:

<http://www.fas.usda.gov/scriptsw/attacherep/default.asp>

[1] Super de Boer has agreed to a buy-out offer from rival Jumbo. Jumbo's market share is expected to double.

[2] Koop consult's activities have merged with DeKamarkt and therefore are now part of the buying group Superunie

[3] The name for the new Buying Group that combines Schuitema, Jumbo and Super de Boer is Bijeen

[4] The introduction of the Jumbo XL is planned for 2011