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An Overview of the Dutch Pulse Market

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Product Brief

Vegetables

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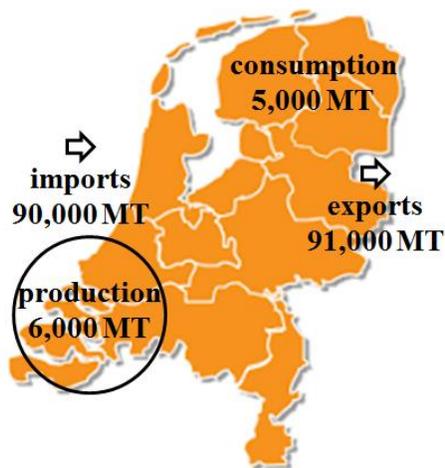
Report Highlights:

The United States is a leading supplier of pulses to the Netherlands. Using the United Nations declaration of 2016 as the International Year of Pulses and the recent publication by the Dutch Health Council recommending increased pulse consumption, FAS/The Hague will actively promote U.S. pulses this year. As a nutritious, healthy, convenient, sustainable and affordable food product, we believe the value of U.S. pulses will resonate with Dutch consumers. Traditionally considered a 'poor man's food', Dutch annual per capita consumption of pulses, at about 0.3 kg, is very low. The Dutch retail and food industry are working together to change this perception. U.S. pulse exporters who are interested in this market can contact us for a list of buyers at AgTheHague@fas.usda.gov.

Introduction

- Pulses are part of the legume family and cover dry beans, dry peas, chickpeas and lentils. (See Appendix 1 for more general information on U.S. pulses). Although there are some pulses used by the feed industry, the focus in this report is on pulses destined for the food market.
- The United Nations (UN) declared 2016 the International Year of Pulses. An International Year designation provides the opportunity to raise awareness and to celebrate the role of dry beans, chickpeas, lentils and dry peas in feeding the world. Even more importantly, it is a good moment to draw together key stakeholders to highlight the contributions pulses make to health, nutrition, and sustainability. More information can be found on iyp2016.org.
- In the Netherlands, the Dutch Health Council, which is the independent scientific advisory body for the government, published in November 2015 new Guidelines for a healthy diet (Richtlijnen Goede Voeding). In these Guidelines, the Council advises to increase the intake of plant protein products. The Council even advises to eat pulses every week. The Guidelines can be found on gezondheidsraad.nl.
- The Dutch Dietary Centre (Voedingscentrum) is using these new guidelines to update their Recommended Dutch Daily Diet, also known as the ‘Wheel of Five’. The current Wheel of Five dates from 1981 and is out-of-date. It is expected that the ‘2016 Wheel of Five’, which will be presented in March, will stress the importance of eating pulses regularly, which has been shown to reduce cholesterol and risk of heart disease.

Section 1. - Market Overview



The Netherlands produces annually about 6,000 MT of pulses, predominantly brown beans. Production takes place in the South-West (provinces of Zeeland and Zuid Holland). An estimated 80 percent of these brown beans are dried and used by the Dutch food industry. The remaining is exported.

The Netherlands is also an importer of pulses. Roughly 80 percent are imports of dry peas and dry kidney beans & navy bean. Pulses are sourced from various countries (Table 1). There are reported imports from France, Belgium, Germany and the United Kingdom which, according to industry sources, are re-exported imports from third countries. France is the only country that actually produces pulses. It is a large producer of yellow peas, often destined for the feed industry. Table 1 shows that Dutch imports vary depending on price, availability and variety.

Table 1. The Netherlands: Pulse Imports by Country (tons)

		2012	2013	2014	2014*	2015*
1	France	12,911	13,952	11,745	9,907	6,310
2	Canada	4,511	6,702	9,703	8,830	3,455
3	Ukraine	7,999	10,226	8,941	8,919	903
4	Belgium	913	1,928	8,122	7,885	888
5	China	9,742	11,465	8,075	6,723	6,214
6	United States	5,333	6,063	7,302	6,539	4,785
7	Germany	12,186	5,665	7,072	6,135	9,363
8	Lithuania	2,775	2,213	6,446	1,854	5,069
9	Turkey	2,817	3,330	4,747	4,158	2,934
10	United Kingdom	3,020	3,505	4,423	3,725	1,204
	Other	63,331	26,761	14,006	13,007	15,911
	World	125,538	91,810	90,582	77,682	57,036

*January - October figures
Source: Global Trade Atlas

The U.S. is a leading supplier of pulses to the Netherlands. Pulses are traded in 22-ton full container loads packed in bags of 25 kg, 50 kg, or 1,000 kg. Around 80 to 85 percent of U.S. pulse exports to the Netherlands are dry kidney beans and navy beans (Table 2). Another 10 to 15 percent is dry peas. Based on the first ten months of 2015 trade figures, exports of U.S. peas and beans are down while exports of U.S. lentils and chickpeas are up.

Table 2. The Netherlands: Pulse Imports from the United States (tons)

<u>HS code</u>	<u>Description</u>	2012	2013	2014	2014*	2015*
071333	dried kidney beans & navy beans	4,152	3,992	6,150	5,444	3,700
071310	dried peas	244	1,485	673	628	63
071340	lentils	911	542	433	433	632
071339	dried beans nesoi	0	40	32	32	110
071350	dried broad beans & horse beans	0	0	10	0	0
071320	chickpeas (garbanzos)	27	3	2	2	281
0713	total	5,333	6,063	7,302	6,539	4,785

*January - October figures
Source: Global Trade Atlas

The majority of Dutch pulse imports are re-exported directly or after processing. In 2014 the Netherlands unprocessed pulse exports totaled around 60,000 MT. In addition, the Dutch exported another 31,000 MT of processed pulses. Canned beans (HS200551+HS200559) and canned peas (HS200540) dominate exports of processed pulses.

The per capita consumption of pulses in the Netherlands is low, especially compared to countries in the Southern and Eastern part of Europe. According to the Dutch Health Council, half of the Dutch population even doesn't eat pulses at all. Mainly due to the fact that pulse production in the Netherlands is low and restricted to only brown beans, pulses are not part of the traditional Dutch diet. Eating pulses is often considered as 'poor man's food' and a cheap replacer for meat. The Dutch have a history cooking with rice and pasta-based cuisines and not so much with pulses. Consumers are also in general not aware of the nutritious value of pulses or how to use or prepare them. Total consumption of pulses in the Netherlands is estimated at 5,000 MT annually, or almost 300 grams

per person. The most popular pulses in the Netherlands are ‘Dutch grown brown beans’ and ‘imported navy beans in red tomato sauce’ followed by kidney beans and chickpeas.

FAS/The Hague believes that the market prospects for pulses in the Netherlands look bright. Dutch consumers, and especially young consumers, are more than ever before looking for food products that are healthy, nutritious, convenient, tasty and sustainable. U.S. pulses meet all these criteria. There are lots of activities that are being initiated by the Dutch organization ‘Blije Boon’, which is an initiative from the industry and retail under U.N. IYOP 2016. Pulses are back in the spotlight. Below you will find some interesting links:

- <https://www.youtube.com/watch?v=uF4FkD1Vk5U>
- <https://www.youtube.com/watch?v=zbsYQR273YM>
- <https://www.youtube.com/watch?v=tXXAibY-GX8>
- <http://www.blijeboon.nl/>

Figure 1. Advantages and Challenges U.S. exporters of Pulses Face in the Netherlands

Advantages (product strengths and market opportunities)	Challenges (product weakness and competitive threats)
Dutch Health Council advises consumers to eat pulses every week.	Fierce competition on quality with Canada and on price with France, China, Canada, Eastern Europe, Australia and Argentina.
Pulses are healthy, nutritious, convenient and tasty.	Traditional consumers consider pulses to be ‘the poor man’s food’, as a cheap replacer for meat and as a product without much taste.
There are no tariffs on U.S. pulses and they are in complete conformity with EU regulations.	Consumers often are not aware of its nutritious value or how to prepare and use pulses.
U.S. pulses are non-GMO, high in fiber and protein, and low in fat & gluten-free.	Competition from other plant proteins like specialty and ancient grains.
Pulses have a long shelf-life.	
U.S. pulses are sustainable as they require less water, fewer fertilizers and improve the soil by replenishing nitrogen as they grow naturally.	
Production of U.S. pulses is expanding.	
The Dutch food industry and retail are working together in promoting the consumption of pulses.	

Section II. - Market Sector Opportunities and Threats

Both Dutch food companies and specialized importers of pulses operate on the international pulse market. There are food processing companies that will buy directly from local producers or exporters, while others prefer to source via specialized importers, especially when dealing with suppliers from developing countries.

There are two types of food companies active in the pulse industry. The first group, relatively small, includes businesses that produce small consumer size packages of dry pulses for the food retail, wholesale and HRI sector or export markets. The second, and much larger, group covers food companies that cook and can or freeze pulses; also for the food retail, wholesale and HRI sector or export markets. Most popular in the Netherlands are pulses sold in a can or a jar (Figure 2).

1. Entry Strategy

The U.S. Dry Bean Council and the U.S.A. Dry Pea & Lentil Council have a wealth of information and experience in helping U.S. companies in their endeavors expanding business overseas, including the Netherlands. Information about these U.S. industry groups and how they can help U.S. pulse exporters can be found on www.usdrybeans.com and www.pea-lentil.com.

In addition, the local State Department of Agriculture and State Regional Trade Groups can be of assistance in promoting your pulses in the Netherlands. An overview of the local State Department of Agriculture can be found at <http://www.nasda.org/9383/States.aspx>.

Trade shows are excellent venues for U.S. exporters to make contact with potential business partners, to conduct product introductions and to gauge buyers' interest. For pulse exporters there are several interesting trade shows that take place in Europe. U.S. exporters should consider visiting or even exhibiting at these shows.

Table 3. Trade Shows Visited by Dutch Buyers of Pulses

Show	When	Show Details & Organizers
BioFach, Nuremberg, Germany European organic show *USDA Endorsed* Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	February 10 - 13, 2016	biofach.de
PLMA World of Private Label, Amsterdam, The Netherlands World's largest private label show Contact: Marcel Pinckaers +31 70 3102 305 marcel.pinckaers@fas.usda.gov	May 24 – 25, 2016	plmainternational.com
SIAL, Paris, France Europe's largest food & beverages show in 2016 *USDA Endorsed* Contact: Laurent Journo +33 14312 2245 Laurent.journo@fas.usda.gov	October 16 -20, 2016 Bi-Annual	sial.fr

Show	When	Show Details & Organizers
ANUGA, Cologne, Germany Europe's largest food & beverages show in 2017 *USDA Endorsed* Contact: Kelly Stange +49 3083 05 1151 kelly.stange@fas.usda.gov	October 07 - 11, 2017 Bi-Annual	anuga.com
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	foodingredientglobal.com

Another excellent tool to find foreign buyers of pulses is to participate in a Buyers Mission. The Western U.S. Agriculture Trade Association (WUSATA) organizes the Specialty Grain and Edible Beans Inbound Trade Mission to Colorado and Montana every year. Dutch buyers have successfully participated in the past on various occasions. Additional reports that might be useful include:

- Dutch food retail [NL5023](#).
- Dutch foodservice market [NL3023](#).
- Dutch food processing market Report [NL4026](#).

2. Market Size, Structure, Trends

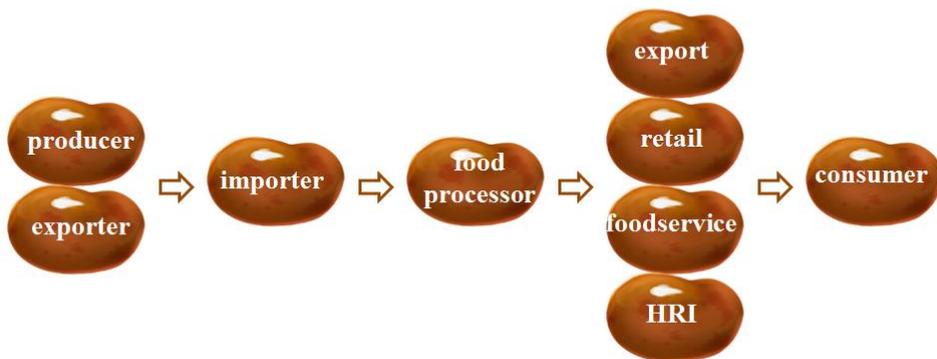
The vast majority of pulses are sold via food retail channels. Figure 2 gives a good indication how they are presented on retail shelves. The majority of pulses are cooked and packed conveniently in a jar or can. These products are ready to use. A relative small market covers pulses (dry product) packed in a consumer size pack. These products first need to be prepared before they can be used.

Figure 2. Pulses on Retail Shelves



Figure 3.

Distribution Channel



3. Company Profile

U.S. pulse exporters can request a detailed Foreign Buyers List by contacting the FAS office in The Hague, please see Section V.

Section III. – Costs and Prices

There are no tariffs on U.S. pulses and they are in complete conformity with EU regulations, for more detailed information please go to [European Commission](#) (page 92 and 93).

HIDC, or Holland International Distribution Council, can answer questions U.S. exporters might have on supply chain challenges. HIDC represents distributors and understands logistics, legal and financial regulations.

HIDC

Mr. Jan Paul Olijslager

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Email: jp.olijslager@ndl.nl / jp.olijslager@hidc.nl

www.hidc.nl.

Section IV. – Market Access

Detailed information on all the market access regulations, standards and procedures can be found in the Food and Agricultural Import Regulation Standards (FAIRS) report [GAIN NL5011](#) or http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative%20The%20Hague%20Netherlands_4-13-2015.pdf. The 2016 FAIRS report for the Netherlands is expected to be published this spring and can be downloaded from fas.usda.gov.

Section V. – Key Contacts and Further Information

USA Dry Pea & Lentil Council, US Dry Bean Council

Mrs. Johanna Stobbs
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75007 Paris, France
Tel: + 33 (0) 1 45 51 36 03
Fax: + 33 (0) 1 47 53 72 85
Mobile: + 33 (0) 6 14 11 04 19
Email: jstobbs@marketbase.fr

Western U.S. Agriculture and Trade Association (WUSATA)

Mr. Ted Horton
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Tel: +44 20 3468 0123
Mobile: +44 7947 570 614
Email: ted@tradescope.eu

USDA – FAS/The Hague

Please contact FAS/The Hague for a Foreign Buyers List (FBL) of pulses.
Marcel H. Pinckaers
U.S. Embassy covering the Netherlands and the Nordics
Tel: +31 70 3102 305
Pinckaersm@state.gov

Appendix 1.

U.S. Pulses are part of the legume family and cover dry beans, dry peas, chickpeas and lentils. They grow on a vine, yielding 1-12 seeds per pod. Pulses dry naturally in the field. U.S. pulses mature and harvest in 4 to 5 months (planting in April/May, harvest in August/September). They are one of the healthiest foods in the world as they are high in fiber and protein compared to other plant protein. Below you will find a detailed overview of all U.S. pulses available.

U.S. dry peas:



whole green peas



split green peas



whole yellow peas



split yellow peas

U.S. dry beans:



Small Red



Great Northern



Light Red Kidney



Pink



Pinto



Black



Navy



Cranberry



Chickpea



Black Eye



Dark Red Kidney



Baby Lima

U.S. chickpeas:



U.S. Richlea Lentils:



U.S. Red Chief Lentils:

