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Netherlands

Exporter Guide

Exporting U.S. agricultural products to the Netherlands and Belgium

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Report Highlights:
The exporter guide provides practical tips to U.S. exporters on how to conduct business in the Benelux countries. The report also identifies the three market sectors (food retail, food service and food processing) and describes the best market entry approach and best high-value product prospects. The exporter guide finally focuses exclusively on consumer-oriented and fishery products.

SECTION I. MARKET OVERVIEW

Macroeconomic Situation and Trends

The Netherlands:

In December 2013, the Netherlands Bureau for Economic Policy Analysis (CPB) forecasted that Dutch GDP will drop by 1.25 percent in 2013, after a drop of 1.2 percent in 2012. In 2014 the economy is expected grow by 0.5 percent. The export of goods, an essential element of the Dutch economy, recovered rapidly from the recession with a growth of 13.5 percent in 2010 after a dramatic drop of 9.3 percent in 2009. However, recovery of exports slowed to 4.4 percent in 2011 and 1.9 percent in 2012. According to CPB's forecast the exports will continue to grow moderately by 0.5 percent in 2013 and by 4 percent in 2014. Unemployment has steadily increased since 2011 from 4.4 percent to expected 6.75 percent this year and 7.5 percent in 2014. The annual inflation rate fluctuated around 2.5 to 3.0 percent since 2011, but is expected to drop to 1.5 percent in 2014. Purchasing power has been impacted by the recent economic downfall and government's austerity measures; the negative growth continued from -1.0 percent in 2011 to -2.4 percent in 2012. This year the purchasing power is expected to drop by 1 percent, but it is expected to increase by 1 percent in 2014. Arguably the sluggish domestic demand impacted by the government's austerity measures, problematic housing market and increasing unemployment continues be the biggest cause for slow economic growth.

Figure 1: Key Data Dutch Economy

	2010	2011	2012	*2013	*2014
Economic Growth %	1.7	0.9	-1.2	-1.3	0.5
Inflation (HIPC) %	0.9	2.5	2.8	2.8	1.5
Unemployment %	4.5	4.4	5.3	6.8	7.5
GDP (billion $)	754	768	768	781	794

Source: Central Bureau of Statistics/Netherlands Bureau for Economic Policy Analysis/Eurostat
* ECON/FAS forecast

Belgium:

The Belgian economy is slowly getting into positive growth territory, with an expected net GDP growth of 0.1 percent in 2013 and 1.1 percent in 2014. The government of Belgium (GOB) now aims at a 2014 budget deficit of 2.15 percent of GDP, and seems to be well on track to have no budget deficit by 2016. The unemployment rate will rise through 2013, but stabilize by the end of 2014.

Figure 2: Key Data Belgian Economy

	2010	2011	2012	*2013	*2014
Economic Growth %	2.3	1.8	-0.1	0.1	1.1
Inflation (CPI) %	2.3	3.4	2.6	1.1	1.1
Unemployment %	8.3	7.2	7.6	8.6	9.1
GDP (billion $)	419	428	412	419	428

Source: www.nbb.be
* ECON/FAS forecast

Benelux Importers Key in U.S. Exports to the EU-28

The main focus of this report is on consumer-oriented and fish products. The EU-28 continues to be an important market as 7.5 percent of all U.S. exported Consumer-Oriented products end up in this market. The importance of the EU for U.S. seafood exports is even greater as almost a quarter was sold on the EU market in 2012. More detailed data are available at http://www.fas.usda.gov/gats/BicoReport.aspx?type=country.

Figure 3: U.S. Exports Of Agricultural and Related Products, by Destination (in million $)

2012	World	EU-27	Benelux
Bulk products	53,606	2,502	237
Intermediate products	28,485	3,098	825
Consumer Oriented products	59,179	4,467	1,319
Agricultural Related products	16,868	3,221	643
Total	158,138	13,289	3,024

Source: www.fas.usda.gov (BICO reports)

U.S .exports of agricultural and related products to the EU-28 are up for the third consecutive year. Although tree nuts, soybeans and fish products continue to be the largest product groups, prepared foods, vegetable oils, distilled spirits, pet food and (processed and fresh) fruit are gaining market share. Export figures of January through September 2013 show an increase of 14 percent of U.S. exports of agricultural and related products. More detailed figures can be downloaded on http://www.fas.usda.gov/gats/BicoReport.aspx?type=country

The Benelux (Belgium, the Netherlands and Luxembourg) is within the EU-28 an excellent market for U.S. products, as it is responsible for almost a quarter of all EU-28 imports of U.S. agricultural and related products (figure 3).

Key Developments and the Impact on Consumer Buying Habits

The Benelux has over 28 million inhabitants and is the most densely populated region in the EU, with 412 people per square kilometer. More than two-thirds of its slowly growing population lives in a 130 mile corridor stretching from Amsterdam to Brussels.

The majority of households are dual income. The household size continues to drop as the single and also double income (and no children) households are growing. All are willing to pay for convenience, variety and healthy food. As a result they are purchasing more meal components and ready-to-eat products, but this group is also experimenting more with ethnic cuisines and other concepts.

Another development that drives changing consumer buying habits is the on-going trend towards smaller households. There are some 12 million households with an average size of 2.3 people. Single and two person households are growing and households of 4 or more persons declining. Not only does this trend demand smaller portions, industry contacts also claim that these consumers tend to buy more expensive, value-added products or meal components.

The Benelux population is graying as the 0-20 age group is declining and the 65+ age group is growing rapidly. It is worth noting that the 65+ age group has a relatively high purchasing power since, in general, they live in paid-off houses and enjoy a generous pension.

Figure 4: Advantages and Challenges U.S. Products Face In The Benelux

Advantages	Challenges

• Affluent and open-minded consumers • Highly developed infrastructure • Trade history and mentality • Strong interest in experimenting with new and innovative products and/or concepts • Favorable image of American products	• Saturated markets • Transatlantic transportation is costly and takes time • Competition from locally produced U.S. style products and local supply • Tariffs and Non-Tariff trade barriers • Highly consolidated retail industry

Source: FAS/The Hague

Demand For Sustainable Food Products up by a Quarter

During the last decade, especially Dutch retailers have increasingly sourced food products which are either produced sustainably or obtained in a sustainable manner. The Dutch government published a report, "Monitor Duurzaam Voedsel 2012", which gives an overview of consumer spending on sustainable food in the Netherlands. Sustainable food is one of the most important growth markets in food retail and foodservice markets. The turnover of sustainable food rose in 2012 by 25.2 percent while total spending on food in the same year only grew by 0.3 percent. As a result, the market share of sustainable food increased from 4.4 percent in 2011 to 5.5 percent last year. More information on the market for sustainable products can be found in GAIN NL 2014 or http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Retail%20Foods_The%20Hague_Netherlands_6-25-2012.pdf.

The report 'Using sustainability to market U.S. foods in Europe' provides information and analysis for U.S. exporters of food and agricultural products on the topic of sustainability. More information can be found in GAIN AU12008 or 'http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Using%20%e2%80%98Sustainability%e2%80%99%20to%20Market%20U.S.%20Foods%20In%20Europe_Vienna_EU-27_11-2-2012.pdf'.

The Market for Organic Food Continues To Grow

The Partnership on Organics between the EU and U.S. offers export opportunities for U.S. organic products. The report 'Export opportunities for U.S. organics in the EU' provides information on the organic market in the EU and opportunities for U.S. products. More information can be found in GAIN NL 3003 or 'Export opportunities for U.S. organics in the EU market'.

Awareness of Health and Well-Being

As consumers are becoming more aware of and concerned about the effects food has on their health and well-being, there has been a trend to a more healthful lifestyle in Western European countries. The following U.S. industries have all benefitted from this trend: nuts (pistachios, almonds, walnuts, etc.), fruits (cranberries, pomegranates, berries, etc.), seafood (salmon, halibut, etc.) and to some extent beans and lentils.

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs

Following are some characteristics of doing business in the Netherlands, Belgium or Luxembourg:

- Most business people speak English and have a high level of education (Masters or Bachelor's degree).

- Generally speaking, they are straightforward and business-minded. They want to be well informed about the product/service and their business partner before doing business. At the same time, they do not want to waste anybody's time and can be quick decision makers.

- Due to the increasing power of retailers and to changing consumers' demands, food processors and traders are increasingly looking for long-term partnerships rather than a one-off business transaction.

Food Standards & Regulations and General Import & Inspection Procedures
A detailed report on the Dutch import regulation standards and also on general import and inspection procedures can be found in GAIN Reports NL3004 or 'Food and Agricultural Import Regulations and Standards - Narrative'.

A detailed report on the Belgian import regulation standards and also on general import and inspection procedures can be found in GAIN Reports BE3003 or
'Food and Agricultural Import Regulations and Standards - Narrative'.

Manufacturers (that are not eligible to export to the European Union) that want to send their products for e.g. exhibiting at a trade show or for research purposes can request an import waiver. However this practice is uncommon as the product cannot be consumed and must be destroyed under supervision.

For the Netherlands, you can contact the Netherlands Food and Consumer Product Safety Authority (NVWA) for obtaining the right documents and specific requirements:
NVWA
Division PRIMEX
Department TVE Import
Postbus 3000
3330 DC Zwijndrecht, the Netherlands
Phone : +31 78 6112100
Fax: +31 78 6112141
E-mail: import@vwa.nl
Internet : www.vwa.nl

For Belgium, you can contact the Federal Agency for the Safety of the Food Chain (FAVV) for obtaining the right documents and specific requirements:
FAVV
AC-Kruidtuin
Food Safety Center
Kruidtuinlaan 55 – 5th floor
B-1000 Brussels, Belgium
Phone: +32 2 211 8622
Fax: +32 2 211 8640
Email: import.export@favv.be
Internet: www.favv.be

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

The Food Retail Market
The latest information available on the food retail market can be found in GAIN Report NL2014 or 'The Benelux Food Retail Market'.

The Foodservice Market
The latest information available on the foodservice market can be found in GAIN Report NL3023 or 'An overview of the HRI Market in the Netherlands and Belgium'.

The Food Processing Market
The latest information available on the food processing market can be found in GAIN Report NL2022 or 'The Food Processing Ingredients Market'.

Private Label Products

- The market share for private label products continues to increase in most European markets. The largest market shares are to be found in the Western European countries, led by Spain (49 percent), the U.K. (47 percent) and Portugal (43 percent). Belgium and the Netherlands had a market share of 40 percent and 36 percent, respectively. Market shares in the Nordic region and most of the Central and Eastern European countries are between 25 percent and 30 percent.

- The market share of private label is high in retail markets that are highly consolidated and innovative. Several retailers in the Benelux market have developed two private labels; one focusing on price whereas the other is aiming at adding value. Consumers are discovering the good value for money that private label brands are offering; they can be a good alternative for A-branded products.

- Private label seems to fare well not only in years of recession but also in more prosperous times. The profitability of private label products has fueled retailers' interest to offer more private label products (e.g. gluten-free, healthy, and organic) and move into other areas of private label (e.g. bakery and cosmetics). The on-going expansion of local and international discounters continues to boost the growing market for private label products as well.

- There are great possibilities for U.S. suppliers of tree nuts, peanuts, pulses, rice, fruit (juices), seafood, and other food ingredients.

- The largest trade show for the Private Label industry takes place in Amsterdam, the Netherlands. Every year around 10 U.S. companies exhibit at the Amsterdam PLMA fair which is scheduled for 2014 on May 20 and 21. Please contact our office in The Hague, the Netherlands for more information about the show and to check if your commodity cooperator or State Regional Trade Group is planning on participating.
  FAS/The Hague: Marcel Pinckaers: marcel.pinckaers@fas.usda.gov and +31 70 3102 305

SECTOR IV. BEST CONSUMER ORIENTED PRODUCT PROSPECTS
Figure 5: Netherlands, The Best High-Value Products Prospects, 1,000 $

Commodity / code	Imports, 2012	Imports from U.S., 2012 (U.S. market share)	Key Constraints Over Market Development	Market Attractiveness for USA

Food preparations / 210690	854,704	134,988 (16%)	Competition from Germany, the U.K. and Belgium	The Benelux has a big export-focused food processing industry
Bovine Cuts Boneless / 020130	696,399	98,053 (14%)	Competition from Australia, Uruguay, Argentina and Ireland	Demand for good quality beef and willingness to pay a premium price
Pistachios / 080251	90,853	69,805 (72%)	Some competition from Iran	Strong demand from food manufacturers, confectionary and snack industry
Foliage branches / 060420	218,502	61,615 (28%)	depending on the developments in the cut flower industry, competition from Costa Rica, Guatemala and Israel	Benelux countries dominate global trade in cut flowers and therefore the trade in foliage within the EU
Vegetable seeds / 120991	372,539	62,192 (17%)	Competition from France, China and Chile	Highly sophisticated, specialized and internationally operating horticultural industry
Grapefruit / 080540	169,603	22,813 (13%)	Competition from China, South Africa and Israel	Demand for healthy products and good quality fresh fruit
Nonalcoholic beverages / 220290	315,939	28,764 (9%)	Competition from Germany, Belgium, the UK and China	Demand for innovative drinks
Walnuts / 080232	39,851	12,189 (31%)	Competition from Chile, Moldova and India	Demand for healthy products and ingredients, U.S. continues to be a steady and large supplier of walnuts
Sweet potatoes / 071420	26,449	14,168 (54%)	Competition from Honduras, China and South Africa	Demand for new, healthy and quality products
Wine / 2204	1,149,826	12,720 (1%)	competition from France, Germany and other New World Wine countries	Per capita consumption of wine continues to grow in the Benelux countries, demand for new world wines grows
Snack foods	1,347,295	15,576 (1%)	Competition from Belgium and Germany	Demand for luxury and tasty confectionary products
Condiments and sauces / 210390	257,486	5,007 (2%)	Competition from Germany, Belgium, Italy and France	Demand for innovative sauces to complement pasta and rice dishes
Beer / 220300	273,587	1,523 (1%)	Competition from Belgium and Germany	Demand for specialty beers from microbreweries

Sockeye Salmon / 030311	4,639	3,938 (85%)	There is no real competition	Demand for healthy and sustainable products, demand for seafood is up, Alaska seafood has great image
Berries / 081020	43,514	3,786 (9%)	Competition from Mexico, Spain and Poland	Demand for healthy products and good quality fresh fruit
Scallops / 030721	4,751	648 (14%)	Competition from Denmark	Growing awareness and demand in the high-end HRI industry

Source: World Trade Atlas

Figure 6: Belgium, The Best High-Value Products Prospects, 1,000 $

Commodity / code	Imports 2012	Imports from U.S., 2012 (U.S. market share)	Key Constraints Over Market Development	Market Attractiveness for USA
Condiments and sauces / 210390	158,567	3,746 (2%)	Competition from the Netherlands, France, Germany, Italy and the U.K.	Demand for innovative sauces to complement pasta and rice dishes
Snack foods	1,367,821	9,307 (1%)	Competition from the Netherlands, France, Germany and Italy	Demand for luxury and tasty confectionary products
Scallops / 030729	12,070	1,812 (15%)	Competition from Denmark	Growing awareness and demand in the high-end HRI industry
Nuts & Seeds / 200819	107,384	18,945 (18%)	Competition from Turkey, Italy and Spain	Strong demand from food manufacturers, confectionary and snack industry
Mixes & Doughs / 190120	114,714	3,417 (3%)	Competition from France, Netherlands and Germany	Demand for specialty and value added processed food products
Walnuts / 080232	11,072	1,256 (11%)	Competition from France, Italy and India	Demand for healthy products and ingredients, U.S. continues to be a steady and large supplier of walnuts

Source: World Trade Atlas

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

U.S. Embassy
FAS/The Hague
Marcel H. Pinckaers
Lange Voorhout 102, 2514 EJ The Hague, The Netherlands
Phone: +31 (0)70-310.2305

Fax: +31 (0)70-365.7681
E-mail: marcel.pinckaers@fas.usda.gov
Website: http://thehague.usembassy.gov/fas.html or www.fas.usda.gov

The EU uses the Combined Nomenclature (CN) for the customs classification of goods. The CN eight digit code numbers are based on the Harmonized System (HS) nomenclature: the first six digits refer to the HS headings; the two following digits represent the CN subheadings. The EU's on-line "Taric" customs database can be consulted to look up commodity codes and relevant import duties. Taric is a multilingual database covering all measures relating to tariff and trade legislation. The EU's 2013 Tariff Schedule was published on October 31, 2012 in Official Journal L 304. A list of customs authorities can be found at http://ec.europa.eu/taxation_customs/common/links/customs/index_en.htm.

It is also possible to obtain Binding Tariff Information (BTI) from a member state's customs authority to get the proper product classification. Through this system, traders know in advance the tariff classification of the goods they intend to import. BTI is legally binding in all the member states. Information on how to obtain a BTI can be downloaded from the European Commission's Taxation & Custom's website at http://ec.europa.eu/taxation_customs/customs/customs_duties/tariff_aspects/classification_goods/index_en.htm. More information on the Netherlands customs authorities can be found at http://www.belastingdienst.nl/wps/wcm/connect/bldcontentnl/belastingdienst/douane_voor_bedrijven/index.html

More information on EU import duties can be found on http://useu.usmission.gov/agri/import.html.

Marketing
An overview of leading trade shows can be found in Appendix 2.

U.S. Cooperators
An overview of U.S. cooperators can be found at http://www.usaedc.org/about.cfm#members (click on "Click Here for a list of USAEDC Members"). Be aware that not all US cooperators have programs for the European market.

Appendix 1. Leading Wholesalers and Distributors in the Benelux

Deli XL
Mr. D. Slootweg
P.O. Box 440
Frankeneng 18
6710 BK, Ede, the Netherlands
P: +31-(0)318-678911
F: +31-(0)318-622347
E: dick.slootweg@ahold.nl
W: www.delixl.nl

Hanos / ISPC
Mr. H. van Looijengoed
P.O. Box 10378
Stadhoudersmolenweg 37
7301 GJ, Apeldoorn, the Netherlands
P: +31-(0)55-5294444
F: +31-(0)55-5224621
E: hvanlooijengoed@hanos.nl
W: www.hanos.nl

JAVA
Wingepark 10
B-3110 Rotselaar, Belgium
P: +32-(0)16 589 620
F: +32-(0)16 589 611
W: www.jave-coffee.be

De Kruidenier Foodservices Nederland
Sluisjesdijk 111
3087 AE Rotterdam, the Netherlands
P: +31-(0)10-4950790
F: +31-(0)10-4956696
E: info@kruidenier.nl
W: www.kruidenier.nl

De Kweker
Mr. Jan Boer
P.O. Box 59345
Jan van Gaalenstraat 4
1040 KH, Amsterdam, the Netherlands
P: +31-(0)20-6063606
F: +31-(0)20-6063600
E: info@kweker.nl
W: www.kweker.nl

Makro (Metro Cash & Carry)
Mr. M. (Maarten) Van Hamburg
Mr. B. Eijssink
Diermervijver, Gebouw Vijverpoort, Dalsteindreef 101-139
1112 XC Diemen, the Netherlands
P: +31-(0)20-3980200
F: +31-(0)20-3980201
I: bas.eijssink@metro-mcc.nl
W: www.makro.nl

Sligro - VEN
Mr. R. van Herpen
Mr. J. te Voert
P.O. Box 47
Corridor 11
5460 AA, Veghel, the Netherlands
P: +31-(0)413-343500
F: +31-(0)413-341520
E: info@sligro.nl
E: jtevoert@sligro.nl
W: www.sligro.nl

VHC – MAXXAM
P.O. Box 90
3340 AB Hedrik-Ido-Ambacht, the Netherlands
P: +31-(0)78-6833400
F: +31-(0)78-6833830
I: info@vhc.nl
W: www.vhc.nl
W: www.maxxam.nl

Source: FAS/The Hague

Appendix 2. Trade Shows

Trade Shows Frequently Visited by Benelux Food Buyers		
Show	When	Show Details & Organizers
HORECAVA, Amsterdam, The Netherlands National hotel and restaurant show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	January 12 – 15, 2014	tel: + 31-(0)20-5753032 fax: + 31-(0)20-5753093 www.horecava.nl
International Confectionary Fair (ISM), Cologne, Germany European confectionary show Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	January 26 – 29, 2014	www.ism-cologne.com
Fruit logistica, Berlin, Germany European fresh fruit and vegetable show **USDA Endorsed Show** Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	February 6 – 8, 2014	www.fruitlogistica.com
BioFach, Nuremberg, Germany European organic show **USDA Endorsed Show** Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	February 05 - 07, 2014	www.biofach.de
Tavola, Kortrijk, Belgium Regional food retail show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	March 16 – 18, 2014	www.tavola-xpo.be
International Trade Fair Wine and Spirits, Dusseldorf (ProWein), Germany European wine and spirits show Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	March 23 – 25, 2014	www.prowein.com
Seafood Exhibition Global (SEG), Brussels, Belgium	May 06 - 08,	tel: +1-207-8425504

Trade Shows Frequently Visited by Benelux Food Buyers		
Show	When	Show Details & Organizers
World's largest seafood show **USDA Endorsed Show** Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	2014	fax: +1-207-8425505 www.euroseafood.com
World of Private Label (PLMA) Amsterdam, The Netherlands Europe's largest private label show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	May 20 – 21, 2014	tel: +31-(0)20-5753032 fax: +31-(0)20-5753093 www.plmainternational.com
Interzoo, Nuremberg, Germany Petfood show **USDA Endorsed Show** Trade Show Office Contact: Andrea Fennesz Berka +43 1313 39 2364 andrea.fennesz-berka@fas.usda.gov	May 29 – June 01, 2014	www.interzoo.com
SIAL, Paris, France Europe's largest food & beverages show in 2014 **USDA Endorsed Show** Contact: Laurent Journot Laurent.journot@fas.usda.gov	October 19 -23, 2014 Bi-Annual	tel: +33-(0)1-49685498 fax: +33-(0)1-49685632 www.sial.fr
Horeca Expo, Gent, Belgium Regional hotel, restaurant and catering show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	November 23 - 27, 2014	tel: +32-(0)9-2419211 fax: +32-(0)9-2419475 email: horeca@flandersexpo.be www.horecaexpo.be
Health Ingredients Europe, Amsterdam, the Netherlands **USDA Endorsed Show** Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	December 02 - 04, 2014	www.foodingredientsglobal.com

Source: FAS/The Hague

Appendix 3. An Overview of the Leading Benelux and Nordic Importers of Specialty Foods (in alphabetic order)

American Food Service
Mr. G. Chin-A-Kwie
Gageldijk 1
3602 AG Maarssen, the Netherlands
P: +31-(0)30-2613604
F: +31-(0)30-2613624
E: g.chin@americanfood.nl
W: www.americanfood.nl

Bickery Food Group
Mr. J. Manassen
P.O. Box 433
1200 AK, Hilversum, the Netherlands
P: +31-(0)35-6560244
F: +31-(0)35-6563824
E: joost.manassen@bickery.nl
W: www.bickery.nl

Camps Food
Mr. P. (Pascal) Camps
Ginnekenweg 251
4835 NB, Breda, the Netherlands
P: +31-(0)6-20056024
E: pascal@campsfood.nl
W: www.campsfood.nl

Engel Foreign Food
Mr. W. Westerveld
Ondernemingsweg 264
1422 DZ, Uithoorn, the Netherlands
P: +31-(0)297-533833
F: +31-(0)297-531665
E: w.westerveld@effbv.nl
W: www.engelforeignfood.com

GranFood
Mr. O. Brokke
Zuiderweg 12
2289 BN, Rijswijk, the Netherlands
PO Box 1039
2280 CA, Rijswijk, the Netherlands
P: +31-(0)70-3815007
F: +31-(0)70-3850259
E: obrokke@granfood.nl
W: www.granfood.nl

Gray's American Stores
Mr. Johan Höglund
Storsätragränd 5
127 39 Skärholmen, Sweden
P: +46-(0)70-4804471
E: johan@grays.se
W: www.grays.se

Haugen-Gruppen
Mr. Mats Holmstedt
Hydraulvägen 12
616 34 Åby, Sweden
P: +46-(0)70-6007039
F: +46-(0)11-362940
E: Mats.Holmstedt@Haugen-Gruppen.se
W: www.haugen-gruppen.se

His & Hers Oy
Ari Halme
01301 Vantaa, Finland
P: +358-9-823 1200 / +358 500 423 729
F: +358-010-296 0267
E: ari.halme@kolumbus.fi
W: www.hisandhers.fi

Jens & Co
Mr. Jens Peder Damgaard
Virkelyst 2-4
Gjellerup
7400 Herning, Denmark
P: +45 9627 6066

Maer Foods
Mr. H. Rijpma
P.O. Box 79
7590 AB, Denekamp, the Netherlands
P: +31-(0)541-358010
F: +31-(0)541-358011

F: +45 9627 6061
E: info@jensogco.dk
W: www.jensogco.dk

Pietercil Barends
Mr. D. van Bueren
Bleiswijkseweg 51
2280 AB, Zoetemeer, the Netherlands
P: +31-(0)79-3441148
F: +31-(0)79-3424549
E: danny.van.Bueren@pietercil.com
W: www.pietercil.com

E: hillebrand.rijpma@maerfoods.eu
W: www.maerfoods.eu

Springwater
Mr. Marc Bod
Amsteldijk Zuid 198b
1188 VP Amstelveen, the Netherlands
P: +31-(0)297-231824
F: +31-(0)297-231841
E: marc@springwater.nl
W: www.springwater.nl

Source: FAS/The Hague

Table A. Key Trade & Demographic Information for the Netherlands & Belgium

2012 Figures

The Netherlands:

Agricultural, Fish and Forestry Imports From All Countries ($ Million) / U.S. Market Share (%)	64,600 / 4
Consumer Oriented Food Imports From All Countries ($ Million) / U.S. Market Share (%)	29,614 / 3
Fish and Seafood Imports From All Countries ($ Million) / U.S. Market Share (%)	3,023 / 3
Population (Million) / Annual Growth Rate (%)	16.8 / 0.5
Number of Major Metropolitan Areas	Amsterdam, Rotterdam, The Hague and Utrecht
Per Capita Gross Domestic Product ($)	45,711
Unemployment Rate (%)	5.3

Source: World Trade Atlas

Belgium:

Agricultural, Fish and Forestry Imports From All Countries (USD Million) / U.S. Market Share (%)	42,089 / 2
Consumer Oriented Food Imports From All Countries (USD Million) / U.S. Market Share (%)	21,410 / 2
Fish and Seafood Imports From All Countries (USD Million) / U.S. Market Share (%)	1,983 / 2
Total Population (Millions) / Annual Growth Rate (%)	11.0 / 3.8
Number of Major Metropolitan Areas	Brussels and Antwerp
Per Capita Gross Domestic Product ($)	37,413
Unemployment Rate (%)	7.6

Source: World Trade Atlas

Exchange Rate

Year	$	€
2003	1	0.88
2004	1	0.81
2005	1	0.80
2006	1	0.80
2007	1	0.73
2008	1	0.68
2009	1	0.72
2010	1	0.75
2011	1	0.76
2012	1	0.78

Table B. Consumer-Oriented & Fish Products Imports

Netherlands Imports	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
	$ Million			$ Million			percentage		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	26,462	30,126	29,614	734	843	843	3	3	3
Food preparations / 210690	677	812	855	113	135	135	17	17	16
Meat of bovine animals / 020130	564	637	696	57	93	98	10	15	14
Almonds / 080212	92	101	117	66	74	80	71	73	68
Pistachios / 080250	106	91	96	71	63	70	67	69	73
Foliage / 060491	224	234	219	44	56	62	20	24	28
Cranberries / 200893	n.a.	n.a.	44	n.a.	n.a.	36	n.a.	n.a.	82
Nuts / 080290	68	70	68	23	33	29	34	47	43
Nonalcoholic beverages / 220290	337	281	316	31	27	29	9	10	9
Grapefruit / 080540	188	185	168	37	38	24	20	21	14
Enzymes / 350790	206	258	267	15	14	17	7	5	6
Cranberry juice / 200981	n.a.	n.a.	40	n.a.	n.a.	17	n.a.	n.a.	43
Sweet potatoes / 071420	19	28	26	8	12	14	42	43	54
Tomato paste / 200290	61	98	92	0	12	14	0	12	15
Walnuts / 080232	28	40	40	12	14	12	43	35	30
Wine / 220421	982	976	978	8	9	11	1	1	1
Cocoa preparations / 180690	478	523	458	6	8	10	1	2	2
Other Consumer-Oriented Products	22,432	25,792	25,134	243	255	185	1	0	0
FISH & SEAFOOD PRODUCTS	2,654	3,129	3,023	88	99	95	3	3	3
Alaska Pollock / 030475	55	55	55	34	33	34	62	62	62
Cod / 030471	132	132	132	18	22	20	14	17	15
Scallops / 030729	35	36	33	7	10	10	20	28	30
Salmon / 160411	15	14	16	6	8	8	40	57	50
Other Fishery Products	2,417	2,892	2,878	23	26	23	1	1	1

Source: World Trade Atlas

Belgium Imports	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2010	2011	2012	2010	2011	2012	2010	2011	2012
	$ Million			$ Million			percentage		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	19,431	22,232	21,410	284	415	356	1	2	2
Pistachios / 080250	73	88	76	41	54	56	56	61	74
Almonds / 080212	60	72	77	32	42	42	53	58	55
Food preparations / 210690	458	588	587	20	35	39	4	6	7
Orange juice, Brix value <20 / 200912	221	239	267	23	44	37	10	18	14
Foliage / 060491	62	60	56	28	21	25	45	35	45
Nuts / 200819	81	100	107	9	12	19	11	12	18
Pet food / 230910	457	484	466	18	21	18	4	4	4
Orange juice, Brix value >20 / 200919	358	467	372	13	46	12	4	10	3
Enzymes / 350790	147	159	141	8	9	10	5	6	7
Meat of horses / 020500	96	106	104	1	7	9	1	7	9
Grapefruit / 080540	27	26	27	6	9	9	22	35	33
Wine / 220421	762	840	798	5	7	7	1	1	1
Cocoa preparations / 180690	214	231	259	2	5	6	1	2	2
Other Consumer-Oriented Products	16,415	18,772	18,073	78	103	67	0	0	0
FISH & SEAFOOD PRODUCTS	1,933	2,256	1,983	39	55	31	2	2	2
Scallops, frozen / 030729	51	79	53	23	37	19	45	47	36
Other Fishery Products	1,882	2,177	1,930	16	18	12	1	1	0

Source: World Trade Atlas

Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Netherlands Imports

$ 1,000	2010	2011	2012
Germany	4,998,991	5,648,565	5,577,969
Belgium	3,904,268	4,498,960	4,348,613
Brazil	1,808,351	2,150,081	2,051,024
France	1,760,150	1,866,697	1,771,568
Spain	1,493,167	1,563,069	1,543,579
UK	925,512	1,153,495	1,254,990
Italy	877,468	956,499	952,027
South Africa	988,403	936,545	914,077
Poland	693,501	826,132	859,258
United States	734,682	843,497	842,618
Other	8,277,991	9,682,615	9,497,878
World	26,462,484	30,126,155	29,613,601

FISH & SEAFOOD PRODUCTS
Report: Netherlands Imports

$ 1,000	2010	2011	2012
Germany	314,726	398,821	410,848
Iceland	351,233	411,927	353,775
Belgium	163,622	211,024	204,796
China	157,361	185,726	162,688
Norway	143,235	154,988	161,002
Russia	72,416	134,844	144,416
Morocco	151,913	147,808	140,905
UK	120,618	151,653	137,453
Denmark	112,712	123,580	130,454
Vietnam	129,349	148,929	129,875
United States	87,923	98,854	94,852
Other	849,285	961,042	951,848
World	2,654,393	3,129,196	3,022,912

Source: World Trade Atlas

CONSUMER-ORIENTED AGRICULTURAL TOTAL
Report: Belgium Imports

$ 1,000	2010	2011	2012
Netherlands	4,610,777	5,386,900	5,271,497
France	4,573,462	5,247,457	5,039,457
Germany	2,338,712	2,721,191	2,692,553
Spain	933,251	970,963	1,004,971
Italy	810,144	894,582	868,545
UK	505,720	650,168	694,980
Brazil	547,374	558,918	637,635
Colombia	643,260	648,825	557,572
Costa Rica	429,800	439,669	369,657
United States	287,181	415,307	355,709
Ecuador	348,699	379,995	340,495
Other	3,226,929	3,917,688	3,577,064
World	19,255,309	22,231,663	21,410,135

FISH & SEAFOOD PRODUCTS
Report: Belgium Imports

$ 1,000	2010	2011	2012
Netherlands	472,114	546,257	549,594
France	196,389	224,393	204,061
India	67,049	109,267	105,822
Germany	114,677	113,350	103,742
Denmark	89,475	107,998	90,582
Bangladesh	106,768	124,069	85,607
China	85,181	97,173	83,843
Vietnam	87,370	87,272	73,333
Iceland	79,462	79,955	71,412
UK	74,599	83,340	71,318
Ecuador	33,796	72,577	55,275
United States	38,788	55,411	31,413
Other	487,898	555,416	457,460
World	1,933,566	2,256,478	1,983,462

Source: World Trade Atlas