USDA Foreign Agricultural Service
GAIN Report
Global Agricultural Information Network

Required Report - public distribution

Date: 7/29/2014

GAIN Report Number: NL4027

Netherlands

Exporter Guide

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

Approved By:
Mary Ellen Smith
Prepared By:
Marcel H. Pinckaers

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:
Last June, the Netherlands Bureau for Economic Policy Analysis (CPB) forecasted that Dutch GDP will grow by 0.75 percent in 2014, after a drop of 0.9 percent in 2013. In 2015 the economy is expected grow by 1.25 percent. The export of goods and services, an essential element of the Dutch economy, grew by 1.4 percent in 2013. According to CPB's forecast the exports will continue to grow by 3.0 percent in 2014 and by 4.0 percent in 2015. Unemployment has steadily increased since 2011 from 4.4 percent to an expected 7.25 percent in 2014 and 2015. The annual inflation rate fluctuated around 2.5 to 3.0 percent up to 2013, but is expected to drop to 0.5 percent in 2014 and 1.0 percent in 2015. Purchasing power was impacted by the economic downfall and government's austerity measures but is expected to grow again in this and the following year; the rates were -2.1 percent in 2012 and -1.2 percent in 2013 but will be 1.5 percent in 2014 and 0.25 percent in 2015. 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

	2011	2012	2013	*2014	*2015
Economic Growth %	0.9	-1.2	-0.9	0.75	1.25
Inflation (HICP) %	2.5	2.8	2.6	0.5	1.0
Unemployment %	4.4	5.3	6.7	7.25	7.25
GDP (billion $)	806	807	813	823	846

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

Belgium:
The Belgian economy weathered the worldwide economic recession relatively better than most of its EU partners. It saw a mild negative growth (- 0.1 percent) in 2012, but was in positive territory again in 2013 (+ 1.3 percent) and 2014 (+ 1.6 Percent). For 2015, the OECD is forecasting an economic growth of 1.9 percent. At 8.5 percent, the current unemployment rate is also significantly below the Euro-area average of 11.7 percent. Most of the growth is driven by exports (Belgium benefits from a significant part of German exports transiting through Antwerp) and consumer demand. The 2014 budget deficit is set at 2.15 percent of GDP, while a balanced budget should be achieved by 2016. Nevertheless, both OECD and IMF estimate that Belgium stands to gain significantly from several structural reforms on which successive governments so far have been dragging their feet: improving wage competitiveness with its neighbors, increasing the pension age and improving labor market flexibility.

Figure 2: Key Data Belgian Economy

	2011	2012	2013	*2014	*2015
Economic Growth %	1.8	-0.1	0.2	1.6	1.9
Inflation (CPI) %	3.4	2.6	1.2	0.9	1.3
Unemployment %	7.2	7.6	8.4	8.5	8.2
GDP (billion $)	428	412	419	428	440

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 is increasingly an important market as 8.4 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 over a fifth was sold on the EU market in 2013. More detailed data are available at http://apps.fas.usda.gov/gats/BicoReport.aspx?type=country.

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

2013	World	EU-27	Benelux
Bulk products	49,649	2,688	297
Intermediate products	29,871	3,737	845
Consumer Oriented products	64,582	5,433	1,492
Agricultural Related products	17,802	3,094	418
Total	161,903	14,852	3,052

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

U.S .exports of agricultural and related products to the EU-28 are up for the fourth consecutive year. Although tree nuts, soybeans and fish products continue to be the largest imported product groups, forest products, distilled spirits, wine and beer, prepared foods and (processed and fresh) fruit are gaining market share. Export figures of January through May 2014 show an increase of 12 percent of U.S. exports of agricultural and related products. More detailed figures can be downloaded on http://apps.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 a fifth 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: **U.S. supplier strengths and market opportunities**	**Challenges:** **U.S. supplier weaknesses and competitive threats**
Favorable image of American products.	Transatlantic transportation is costly and takes time.
Affluent and open-minded consumers.	Saturated markets.

Growing demand for healthier products sparks increase in demand for processed food products that contribute to a healthier lifestyle.	Sustainability standards are increasingly becoming a requirement of the Benelux food retail industry (MSC, RSPO, etc.).
The demand for sustainable processed food products grows as the market for sustainable food products continues to grow.	U.S. exporters may face competition from suppliers from EU MS due to tariffs and non-tariff trade barriers and transportation costs.
Strong interest in experimenting with new and innovative products and/or concepts.	EU nutrition and health claims differ from the U.S.
Benelux region is the most important gateway for U.S. Consumer Oriented and Seafood products to the EU.	Several processed food products cannot be exported to the EU since they are not EU approved (selected meat and meat products, products containing GMO derived ingredients that are not EU approved, etc.).
	Competition from locally produced U.S. style products and local supply.

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 2014", 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 2013 by 11 percent to almost 2.5 billion. The market share of sustainable food continues to increase. More information 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'.

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: healthy food snacks (the 'free from, low on and rich in' products), nuts (pistachios, almonds, walnuts, etc.), so-called super fruits (cranberries, pomegranates, other berries), seafood products (salmon, halibut, etc.), legumes (beans and lentils) etc.

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'.

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs
Following are some characteristics of doing business in the Netherlands and Belgium:
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 and price 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, importers of processed food products 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 NL4012. A detailed report on the Belgian import regulation standards and also on general import and inspection procedures can be found in GAIN Reports NL4013.

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
P.O. Box 43006
3540 AA Utrecht, the Netherlands
Phone: +31 882 23 33 33
Fax: +31 882 23 33 34
E-mail: info@nvwa.nl
Internet: www.nvwa.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

General Import and Inspection Procedures
Customs provides information of imports from which the NVWA selects the lots for further inspection.
Regulation 2004/882/EC sets out the standards for control of compliance with the General Food Law.

The Import Process:
- Pre-announcement: by Common (Veterinary) Entry Document (CVED or CED), issued by the agent;

- Documentary Check: examination of the original required documents that accompany the consignment based on model certificate according to EU legislation, carried out by Customs based on an agreement between Ministry of Economic Affairs and Ministry of Finance;
- Identity Check: to ascertain that the products correspond to the information given in the accompanying certificates or documents. All veterinary goods undergo an Identity Check. The ID check is conducted by comparing the seal number of the container with the seal number mentioned on the Health Certificate. If no seal number is mentioned on the Health Certificate, the veterinary authorities will need to open the shipment to conduct the Identity Check;
- Physical Check: check on the product itself to verify compliance with food or feed law;

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.

The Foodservice Market
The latest information available on the foodservice market can be found in GAIN Report NL3023.

The Food Processing Ingredients Market
The latest information available on the food processing market can be found in GAIN Report NL4026.

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.

The largest trade show for the Private Label industry takes place in Amsterdam, the Netherlands. Every year around 15 U.S. companies exhibit at the Amsterdam PLMA fair which is scheduled for 2015 on May 19 and 20. 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: pinckaersm@state.gov and +31 70 3102 305

SECTOR IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Figure 5: Netherlands, The Best High-Value Products Prospects, 1,000 $

Commodity / code	Imports, 2013	Imports from U.S., 2013 (U.S. market share)	Key Constraints Over Market Development	Market Attractiveness for USA
Food preparations / 210690	983,395	161,892 (16%)	Competition from Germany, the U.K. and Belgium.	The Benelux has a big export-focused food processing industry.
Bovine Cuts Boneless / 020130	780,187	110,848 (14%)	Competition from Uruguay, Ireland, Brazil and Argentina.	Demand for good quality beef and willingness to pay a premium price.
Pistachios / 080251	89,043	72,253 (81%)	Some, albeit limited, competition from Iran.	Strong demand from food manufacturers, confectionary and snack industry.
Nonalcoholic beverages / 220290	333,844	34,197 (10%)	Competition from Belgium, Germany, the UK and France.	Demand for innovative drinks.
Walnuts / 080232	50,281	12,255 (24%)	Competition from Chile, Ukraine and India.	Demand for healthy products and ingredients; U.S. continues to be a steady and large supplier of walnuts.
Sweet potatoes / 071420	33,460	19,550 (58%)	Competition from Honduras and China.	Demand for variety and healthy and quality products.
Wine / 2204	1,177,100	12,960 (1%)	Competition from France, Germany and New World Wine countries.	Per capita consumption of wine continues to grow in the Benelux countries, demand for New World Wines.
Condiments and sauces / 210390	280,064	4,796 (2%)	Competition from Germany, Belgium, Italy and the UK.	Demand for innovative sauces to complement pasta and rice dishes.
Beer / 220300	291,862	1,452 (1%)	Competition from Belgium and Germany.	Demand for specialty beers from microbreweries.

Source: World Trade Atlas

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

Commodity / code	Imports 2013	Imports from U.S., 2013 (U.S. market share)	Key Constraints Over Market Development.	Market Attractiveness for USA.
Fresh fruit	3,050,271	17,726 (1%)	Competition from China, Cote d’Ivoire, Senegal and Israel.	Growing demand for tropical and exotic fruit.

Processed fruit and vegetables	1,962,724	19,732 (1%)	Competition from Belgium's neighboring countries.	Demand for processed fruit and vegetables products.
Tree nuts	394,406	119,481 (30%)	Some, albeit limited, competition from Spain, Turkey and Iran.	Confectionary and snack industry demand healthy products and ingredients and the U.S. continues to be a steady and large supplier of walnuts, pistachios and almonds.
Wine / 2204	1,302,662	7,239 (1%)	Competition from France, Germany and New World Wine countries.	Per capita consumption of wine continues to grow in the Benelux countries, demand for New World Wines.

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: pinckaersm@state.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 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 trade. 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.

Customs authorities designated for the purpose of receiving applications and issuing binding tariff information:

Belastingdienst Douane Regio Rotterdam Rijnmond Team Bindende Tariefinlichtingen, POBox 3070, 6401 DN Heerlen, the Netherlands.

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 U.S. 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

Hocras
Franse Kampweg 38
1406 NW BUSSUM, the Netherlands
P: +31-(0)35 - 69 79 701
F: +31-(0)35 - 69 79 899
E: hocras@hocras.nl
W: www.hocras.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, 2015	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	February 01 - 04, 2015	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 4 - 6, 2015	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 11 - 14, 2015	www.biofach.de
Tavola, Kortrijk, Belgium Regional food retail show Contact: Marcel Pinckaers marcel.pinckaers@fas.usda.gov +31 70 3102 305	March, 2016	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 15 – 17, 2015	www.prowein.com
Seafood Exhibition Global (SEG), Brussels, Belgium World’s largest seafood show **USDA Endorsed Show** Contact: Marcel Pinckaers	April 21 - 23, 2015	tel: +1-207-8425504 fax: +1-207-8425505 www.euroseafood.com

Trade Shows Frequently Visited by Benelux Food Buyers		
Show	When	Show Details & Organizers
marcel.pinckaers@fas.usda.gov +31 70 3102 305		
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 19 – 20, 2015	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 26 - 29, 2016	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. H. Voorschuur P.O. Box 433 1200 AK, Hilversum, the Netherlands P: +31-(0)35-6560244 F: +31-(0)35-6563824 E: hans.voorschuur@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 F: +45 9627 6061 E: info@jensogco.dk W: www.jensogco.dk	Maer Foods Mr. H. Rijpma P.O. Box 79 7590 AB, Denekamp, the Netherlands P: +31-(0)541-358010 F: +31-(0)541-358011 E: hillebrand.rijpma@maerfoods.eu W: www.maerfoods.eu

Norsk Polar Mr. Eivind Wang PO Box 290 Skoyen NO-0213 Oslo, Norway P: +47-24113555 F: +47-24113540 E: - W: www.unil.no	Oluf Lorentzen Mr. Petter Tandberg Postboks 244 1541 Vestby, Norway P: +47-23142500 F: +47-23142510 E: firmapost@oluf.no W: www.oluf.no
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	Pietercil Delby's Mr. P. Deschaepmeester Vitseroelstraat 74 B-1740 Ternat, Belgium tel.: +32 2583 81 00 fax: +32 2582 29 63 E: philippe.de.schaepmeester@pietercil.com W: www.pietercil.com
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	Starsweets Holland Mr. B. Van Montfrans Stadionstraat 13 b2 4815 NC, Breda, the Netherlands P: +31-(0)76-5964649 F: +31-(0)76-5963011 E: info@starsweets.nl W: www.starsweets.com
Two Food Mrs. L. van Eijden Textielweg 18B 3812 RV Amersfoort, the Netherlands P: +31-(0)35-6090990 F: +31-(0)35-6090988 E: l.vaneijden@2food.nl W: www.2food.nl	Wessanen Mr. R. Miedema P.O. Box 2554 Beneluxlaan 9 3500 GN, Utrecht, the Netherlands P: +31-(0)30-2988738 F: +31-(0)30-2988703 E: Richard.Miedema@wessanen.com W: www.boas.nl
Wonderfood Mr. M. Lazraq Avenue de L'Artisanat, 6 4420 Braine-l'Alleud, Belgium P: +32-(0)2-332-1320 F: +32-(0)2-403-0740 E: majid@wonderfood.eu W: www.wonderfood.eu	Zenobia Mr. P. Cosse Rue du Grand Cortil 17 B-1300 Wavre, Belgium P: +32-(0)10-222394 F: +32-(0)10-222394 E: info@zenobia.be W: www.zenobia.be

Source: FAS/The Hague

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

2013 Figures
The Netherlands:

Agricultural, Fish and Forestry Imports From All Countries ($ Million) / U.S. Market Share (%)	64,498 / 4
Consumer Oriented Food Imports From All Countries ($ Million) / U.S. Market Share (%)	31,239 / 3
Fish and Seafood Imports From All Countries ($ Million) / U.S. Market Share (%)	3,063 / 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 ($)	48,393
Unemployment Rate (%)	6.7

Source: World Trade Atlas

Belgium:

Agricultural, Fish and Forestry Imports From All Countries (USD Million) / U.S. Market Share (%)	44,177 / 2
Consumer Oriented Food Imports From All Countries (USD Million) / U.S. Market Share (%)	23,332 / 2
Fish and Seafood Imports From All Countries (USD Million) / U.S. Market Share (%)	2,116 / 2
Total Population (Millions) / Annual Growth Rate (%)	11.0 / 3.8
Number of Major Metropolitan Areas	Brussels and Antwerp
Per Capita Gross Domestic Product ($)	38,091
Unemployment Rate (%)	8.4

Source: World Trade Atlas

Exchange Rate

Year	$	€
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
2013	1	0.75

Appendix B. Consumer-Oriented & Fish Products Imports

Netherlands Imports	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
	$ Million			$ Million			percentage		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	30,126	29,614	31,239	843	844	976	3	3	3
Food preparations / 210690	812	855	983	135	135	162	17	16	16
Meat of bovine animals / 020130	637	696	780	93	98	111	15	14	14
Almonds / 080212	101	117	155	74	80	106	73	68	68
Pistachios / 080250	91	96	93	63	70	72	69	73	77
Foliage / 060491	234	219	210	56	62	58	24	28	28
Cranberries / 200893	n.a.	44	72	n.a.	36	57	n.a.	82	80
Nonalcoholic beverages / 220290	281	316	334	27	29	34	10	9	10
Nuts / 080290	70	68	113	33	29	32	47	43	28
Grapefruit / 080540	185	168	174	38	24	23	21	14	13
Sweet potatoes / 071420	28	26	33	12	14	20	43	54	61
Tomato paste / 200290	98	92	109	12	14	20	12	15	18
Enzymes / 350790	258	267	299	14	17	18	5	6	6
Cranberry juice / 200981	n.a.	40	39	n.a.	17	18	n.a.	43	46
Cocoa preparations / 180690	523	458	607	8	10	15	2	2	2
Walnuts / 080232	40	40	50	14	12	12	35	30	24
Dried prunes / 081320	12	14	22	5	5	12	42	36	55
Wine / 220421	976	978	1,016	9	11	11	1	1	1
Other Consumer-Oriented Products	25,780	25,120	26,150	250	181	195	0	0	0
FISH & SEAFOOD PRODUCTS	3,129	3,023	3,063	99	95	106	3	3	3
Alaska Pollock / 030475	55	55	72	33	34	52	62	62	72
Cod / 030363	99	99	113	22	20	13	17	15	12
Scallops / 030729	36	33	40	10	10	12	28	30	30
Salmon / 160411	14	16	17	8	8	8	57	50	47
Other Fishery Products	2,892	2,878	2,821	26	23	21	1	1	1

Source: World Trade Atlas

Belgium Imports	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
	$ Million			$ Million			percentage		
CONSUMER-ORIENTED AGRICULTURAL TOTAL	22,232	21,410	23,332	415	356	383	2	2	2
Almonds / 080212	72	77	109	42	42	60	58	55	55
Pistachios / 080250	88	76	68	54	56	50	61	74	74
Food preparations / 210690	588	587	655	35	39	41	6	7	6
Orange juice, Brix value <20 / 200912	239	267	369	44	37	32	18	14	9
Foliage / 060491	60	56	53	21	25	23	35	45	43
Pet food / 230910	484	466	536	21	18	19	4	4	4
Meat of horses / 020500	106	104	98	7	9	16	7	9	16
Enzymes / 350790	159	141	143	9	10	14	6	7	10
Meat of bovine animals / 020130	178	163	180	6	4	13	3	2	7
Grapefruit / 080540	26	27	27	9	9	10	35	33	37
Nuts / 200819	100	107	113	12	19	9	12	18	8
Orange juice, Brix value >20 / 200919	467	372	509	46	12	9	10	3	2
Wine / 220421	840	798	825	7	7	7	1	1	1
Other Consumer-Oriented Products	18,825	18,169	19,647	102	69	80	0	0	0
FISH & SEAFOOD PRODUCTS	2,250	1,983	2,116	55	31	29	2	2	1
Scallops, frozen / 030729	79	53	56	37	19	15	47	36	27
Other Fishery Products	2,177	1,930	2,030	18	12	14	1	0	0

Source: World Trade Atlas

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

CONSUMER-ORIENTED AGRICULTURAL TOTAL

Report: Netherlands Imports

$ 1,000	2011	2012	2013
Germany	5,648,565	5,577,969	6,001,881
Belgium	4,498,960	4,348,613	4,298,390
Brazil	2,150,081	2,051,024	1,973,160
France	1,866,697	1,771,568	1,836,682
Spain	1,563,069	1,543,579	1,683,558
UK	1,153,495	1,254,990	1,254,792
South Africa	936,545	914,077	1,103,833
Italy	956,499	952,027	1,017,060
United States	843,497	842,618	976,035
Poland	826,132	859,258	929,456
Other	9,682,615	9,497,878	11,093,389
World	30,126,155	29,613,601	31,238,780

Source: World Trade Atlas

FISH & SEAFOOD PRODUCTS

Report: Netherlands Imports

$ 1,000	2011	2012	2013
Iceland	411,927	353,775	341,677
Germany	398,821	410,848	313,424
Belgium	211,024	204,796	230,415
Russia	134,844	144,416	189,511
Norway	154,988	161,002	170,249
Denmark	123,580	130,454	144,045
China	185,726	162,688	134,093
Morocco	147,808	140,905	131,446
UK	151,653	137,453	127,724
United States	98,854	94,852	103,553
Other	961,042	951,848	1,060,064
World	3,129,196	3,022,912	3,062,683

CONSUMER-ORIENTED AGRICULTURAL TOTAL

Report: Belgium Imports

$ 1,000	2011	2012	2013
Netherlands	5,386,900	5,271,497	5,917,273
France	5,247,457	5,039,457	5,157,961
Germany	2,721,191	2,692,553	3,023,489
Spain	970,963	1,004,971	1,079,848
Italy	894,582	868,545	971,776
Brazil	558,918	637,635	839,760
UK	650,168	694,980	766,383
Colombia	648,825	557,572	514,599
United States	415,307	355,709	383,197
Ireland	347,440	276,343	354,066
Costa Rica	439,669	369,657	343,329
Other	3,950,243	3,641,216	3,140,272
World	22,231,663	21,410,135	23,331,713

Source: World Trade Atlas

FISH & SEAFOOD PRODUCTS

Report: Belgium Imports

$ 1,000	2011	2012	2013
Netherlands	546,257	549,594	582,161
France	224,393	204,061	241,968
India	109,267	105,822	136,763
Germany	113,350	103,742	115,783
Bangladesh	124,069	85,607	87,710
China	97,173	83,843	85,430
Denmark	107,998	90,582	83,265
Vietnam	87,272	73,333	77,923
UK	83,340	71,318	72,927
Iceland	79,955	71,412	66,827
United States	55,411	31,413	29,231
Other	570,520	474,149	486,773
World	2,256,478	1,983,462	2,116,093