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GAIN Report

Global Agricultural Information Network

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Netherlands

Food Processing Ingredients

Demand for stable supplies of quality food ingredients is up

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Report Highlights:

The turnover of the Benelux food processing industry is estimated at \$155 billion, with 9,500 companies employing just over 200,000 people. Benelux based importers are responsible for over a fifth of total U.S. exports of agricultural and fish products to the EU-28. When meeting EU standards, the following products have good sales potential: nuts, fish fillets, fruit and vegetables, highly processed ingredients, bakery products, dairy products, pulses and specialty grains.

SECTION I. MARKET SUMMARY

The food processing industry is defined as the link between the primary producer whether domestically or internationally and food retail, wholesale & foodservice companies. Products used in the food processing industry range from low-value, unprocessed inputs to high-value, highly-processed products. They can come in bulk form or as specialized food ingredients.

The number of food processors and the size of the food processing industry and its expected growth rate

In the Netherlands there are over 4,000 food processing companies ranging from large multi nationals to a few small & medium sized companies. Approximately 133,000 people are employed in the food processing industry. Last year, the industry generated a turnover of over \$90 billion and turnover is expected to grow by 2 percent in 2014. Meat, dairy and fresh produce each comprise 25 percent of the market. The remaining subsectors contribute the remaining quarter of the turnover.

In Belgium there are roughly 4,500 food processing companies including some large multi nationals but mainly small & medium sized companies. Over 73,000 people are employed in the food processing industry. The industry generated a turnover of almost \$65 billion and turnover is also expected to grow in 2014. The following three subsectors were the largest contributors to this turnover: confectionary, meat and oils/fats.

The majority of the food processing companies are located close to the main port cities Rotterdam, Antwerp and Amsterdam or in places close to the German consumer market North Rhine-Westphalia (with almost 20 million consumers).

Estimate of the value of food ingredients imported versus domestic inputs

EU-28 imports of agricultural and fish products from the U.S. in 2013 were \$13 billion. The Netherlands was responsible for 16 percent (\$2.1 billion) of these imports percent and Belgium for over 5 percent (\$678 million). These figures show the importance of the Netherlands and Belgium within the U.S. and EU trade in food ingredients.

The Netherlands and Belgium (Benelux) are both small countries geographically but the EU traders and food processors are here. Due to their large and sophisticated processing industries, the Netherlands and Belgium increasingly depend on stable supplies of food ingredients from other EU member states and third countries, like the U.S. Expertise, infrastructure, commerce and logistics are all advanced in both countries.

Table 1: Imports of agricultural and fish products, Belgium, 2013 figures, million \$

Bulk Agricultural Products, total imports	7,086
Bulk Agricultural Products, imports from U.S.A.	92 (1%)
Intermediate Agricultural Products, total imports	8,492
Intermediate Agricultural Products, imports from U.S.A.	200 (2%)
Consumer-Oriented Agricultural Products, total imports	5,433
Consumer-Oriented Agricultural Products, imports from U.S.A.	389 (7%)
Fish and Seafood Products, total imports	2,105
Fish and Seafood Products, imports from U.S.A.	29 (1%)

Source: FAS/The Hague

Table 2: Imports of agricultural and fish products, The Netherlands, 2013 figures, million \$

Bulk Agricultural Products, total imports	10,314
Bulk Agricultural Products, imports from U.S.A.	865 (8%)
Intermediate Agricultural Products, total imports	17,276
Intermediate Agricultural Products, imports from U.S.A.	561 (3%)

Consumer-Oriented Agricultural Products, total imports	5,433
Consumer-Oriented Agricultural Products, imports from U.S.A.	1,103 (20%)
Fish and Seafood Products, total imports	3,063
Fish and Seafood Products, imports from U.S.A.	104 (3%)

Source: FAS/The Hague

Identify the key market drivers for food processing and any consumption trends influencing the type and quality of inputs being used in processed foods

There are 3 areas that drive the market for food processing and that are relevant for U.S. suppliers of food ingredients. They are briefly discussed below:

- Nutrition, health and food safety: The Dutch and Belgians are concerned about the impact of food products on people’s health. Food processors are therefore encouraged to develop products that contribute to a healthy diet but also meet consumers’ needs like convenience, taste, affordability and variety. A healthier diet can be reached by developing food products with less salt, less fat and of smaller portions (and therefore fewer calories). Another direction is to inform consumers through Nutritional labeling and Recommended daily allowances (RDAs). More information on the latter can be found in GAIN NL4012.
- Food safety and food trust: Only food products that meet all food safety requirements can be sold on the market. The industry itself is responsible for the safety of the products. The Dutch Food Safety Authority (NVWA) and Belgian Food Safety Authority (FAVV) are responsible to protect human and animal health. It therefore monitors food products to safeguard public health and controls the whole production chain (from raw materials and processing aids to end products and consumption). Food trust became an issue last year when horsemeat was sold as beef. Although the products were safe, the consumer was deliberately misled. As a result the Dutch Minister of Agriculture established the Taskforce Food Trust in order to regain the consumer’s trust in the entire food production chain.
- Sustainability: Food processors are working in various fields together with government, food retail & foodservice, NGOs and farmers to make supply chains more sustainable. The chain starts with raw materials and that is why increasingly companies switch to sustainably produced palm oil, soy products, fish, fresh produce, coffee and cocoa. In the Netherlands, spending on sustainable food in 2013 totaled almost \$3.5 billion, up by 11 percent compared to 2012.

Table 3: Advantages and Challenges

Advantages (sector strengths and opportunities)	Challenges (sector weaknesses and threats)
Growing demand for healthier products sparks increase in demand for food ingredients that contribute to a healthier lifestyle a.k.a. the ‘free from, low on and rich in’ ingredients.	Sustainability standards are increasingly becoming a requirement of the Benelux food industry (MSC, RSPO, etc.).
The demand for sustainable food ingredients grows as the market for sustainable food products continues to grow.	Non-tariff trade barriers may at times disturb trade between the EU and the U.S.
The Netherlands and Belgium depend on stable supplies of food ingredients from other countries, including the U.S.	EU nutrition and health claims differ from the U.S.
A favorable exchange rate makes U.S. food ingredients more price competitive for Benelux food processors.	U.S. exporters may face competition from suppliers from EU MS due to tariffs and non-tariff trade barriers and transportation costs.

Benelux region is the most important gateway for food ingredients trade to the EU.	Several product cannot be exported to the EU since they are not EU-approved (selected meat and meat products, GMO derived ingredients that are not EU approved, etc.).
The large and well developed food processing industry requires a wide range of ingredients, from low-value, unprocessed commodities to high-value, highly processed ingredients.	
U.S. ingredients have a good reputation and image in the Benelux food processing industry.	

Source: FAS/The Hague

SECTION II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

U.S. companies that want to start exporting food ingredients to the Benelux market should research the market for a better understanding. This can be done by reading FAS Attaché Reports and contacting FAS/The Hague. Once U.S. companies have this background information, they have several choices on how to enter the market. They may consider attending or visiting one of Europe's many USDA Endorsed trade shows, <http://www.fas.usda.gov/international-trade-shows-2014> and <http://www.fas.usda.gov/international-trade-shows-2015> and other trade shows in Europe like the Health ingredients show and the Food ingredients show. They serve as a springboard into the market, helping companies to establish new trade contacts and gauge product interests.

U.S. exporters can also contact their respective U.S. State Regional Trade Groups (SRTG), their commodity Cooperator Group and their State Department of Agriculture to obtain additional market entry support. The cooperators regularly organize (Reverse) Trade Missions, often organized around trade shows or other events. They also are excellent platforms for U.S. suppliers of food ingredients to meet with foreign buyers.

1. FAS Attaché Reports

Excellent FAS Attaché reports for new-to-market exporters to the Benelux are:

- The Benelux Exporter Guide which contains a general overview of the macro-economic situation, discusses demographic trends, food trends, offers exporter business tips and shares overviews of the food retail and HRI sectors, GAIN Report – NL4027.
- The Import Regulations and Standards (FAIRS) reports (GAIN Reports: NL4012 and NL4013) provide an overview of import regulation standards and required health and origin certificates.
- The Food Service - Hotel Restaurant Institutional Report (GAIN Report – NL3023) gives an overview of the food service industry and its various sectors within the Netherlands and Belgium. It provides an understanding of the key channels of distribution for foods and beverages destined for food service. It identifies the major players as well as giving contact information for all the main groups within the industry.
- The Retail Foods Report (GAIN Report – NL2014) gives an overview of the food retail market within the Netherlands and Belgium.
- A complete selection of FAS reports can be viewed online at: <http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx>

2. FAS' Office of Agricultural Affairs in The Hague

The Office of Agricultural Affairs in The Hague can be contacted for assistance with questions regarding the Benelux market, trade shows and other marketing or sales opportunities in that market. Contact information for FAS/The Hague is found at the end of this report.

3. Participation in Trade Shows

Appendix 2 of the Benelux Exporter Guide GAIN Report – NL4027 gives you a complete overview of trade shows frequently visited by Benelux buyers of food ingredients.

4. State Regional Trade Groups

The State Regional Trade Groups (SRTG) are regionally located in the U.S. and are non-profit trade development organizations that help U.S. food producers and processors sell their products overseas. They are funded by FAS, the State Departments of Agriculture and private industry. They carry out promotional activities that increase exports of U.S. high-value food and agricultural products.

Activities include participation in international trade shows, overseas trade missions, reverse trade missions, export education, in-country research, and point-of-sale promotions in foreign food chains and restaurants in markets around the world. The SRTGs also administer a cost-share funding program called the Branded Program, which supports the promotion of brand name food and agricultural products in overseas markets. For more information, contact the state regional trade group responsible for your state:

Table 4: The four State Regional Trade Groups

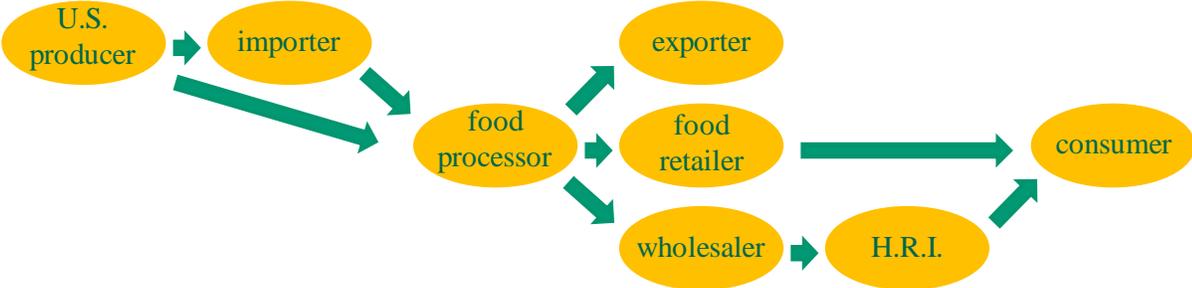
<p><u>Food Export USA - Midwest</u> Member states: Indiana, Illinois, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin E-mail: info@foodexport.org Web site: www.foodexport.org</p>	<p><u>Southern United States Trade Association</u> Member states: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, Puerto Rico, South Carolina, Tennessee, Texas, Virginia, West Virginia E-mail: susta@susta.org Web site: www.susta.org</p>
<p><u>Western U.S. Agricultural Trade Association</u> Member states: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming E-mail: export@wusata.org Web site: www.wusata.org</p>	<p><u>Food Export USA - Northeast</u> Member states: Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont E-mail: info@foodexport.org Web site: www.foodexportusa.org</p>

The U.S. Agricultural Export Development Council is composed of U.S. trade associations and other organizations, in addition to the SRTGs, with an interest in promoting U.S. agricultural exports. For an overview and additional information on the various Commodity Groups, you can go to www.usaedc.org.

B. MARKET STRUCTURE

Depending on the type of food ingredient, there are different supply chains in the Benelux market. The supply chain shows below applies to the majority of the food ingredients. Food processors in the Netherlands and Belgium source their ingredients from local producers or from specialized traders when the ingredients are locally not available or not competitive. Price volatility, documentation and other import requirements, volume, etc. are reasons for food processors to buy ingredients from specialized traders rather than doing business directly. Only large and/or highly specialized food processors might opt to import ingredients directly from foreign suppliers.

Figure 1: Supply chain



The Benelux food processing industry is well developed and has access to any food ingredient imaginable. In order to be successful in the Benelux market, the U.S. food ingredient must have a competitive advantage on for instance price, quality, innovation, quantity, variety, size, (seasonal) availability, packaging, special certification (organic, sustainable), etc. Such products have good potential to fare well in the Benelux although still facing competition from other (third country) suppliers. More detailed information on the Food Retail and Foodservice industry can be found in above mentioned reports.

C. COMPANY PROFILES

Table 5: An overview of the largest food processing companies in the Netherlands

	Company Name	Turnover, worldwide, \$ million	Product group
1	Unilever	30,359	Meal components
2	Heineken	21,511	Alcoholic beverages
3	FrieslandCampina	11,989	Dairy
4	VION Food Group	11,963	Meat and ingredients
5	Nidera Handelscompagnie	10359	Ingredients
6	DSM	4,076	Ingredients
7	CSM	3,993	Bakery ingredients
8	Hoogwegt	2,868	Dairy
9	Cosun	2,483	Ingredients
10	Greenery	2,457	Fresh produce
11	Van Drie Group	2,231	Veal
12	Refresco Group	1,632	Nonalcoholic beverages
13	Loders Croklaan Group	1,381	Ingredients
14	Mars Nederland	1,332	Confectionary
15	Nutreco	1,281	Meat

Source: EVMI, http://koc342rvtzt10dfhwu8lq8xxz.wpengine.netdna-cdn.com/wp-content/uploads/2012/03/EBM_2012_01_EVMI_Food_Top_100.pdf

The food processing industry has benefitted from EU expansion with over half of the region’s agricultural exports going to other EU Member States. Greater growth opportunities are nowadays to be found outside the EU, in for instance the BRICS countries. The on-going consolidation in the food processing industry, driven by the growing buying power of retailers, impacts the price and condition negotiations between processors and food ingredient

suppliers. More than ever before, the food processing industry is consolidating across the border. Not only did companies invest in North and South America in recent years, international companies are also investing in the Benelux countries.

D. SECTOR TRENDS

Investments

- The Netherlands’ trade and investment policy is among the most open in the world. With combined merchandise exports and imports virtually equal to GDP, the Dutch economy is one of the most internationally oriented in the world.
- Investors have found the Netherlands a favorable location for their European investments projects. The Dutch actively solicit foreign investment through the Netherlands Foreign Investment Agency (NFIA) and related regional economic development companies.
- Investment surveys indicate that U.S. investors favor the Netherlands as a location for European Distribution Centers (EDCs). The introduction of a more friendly tax regime in the late 1990s and a drop in the corporate tax rate to 25 percent in 2011 make the Netherlands an attractive location for European headquarters.
- Foreign investors find the Netherlands attractive because of the country’s stable political and macroeconomic climate, a highly developed financial sector, the presence of a well-educated and productive labor force, and the high quality of the physical and communications infrastructure. Some potential bottlenecks in attracting foreign direct investments to the Netherlands include relatively high wage costs and heavy administrative burden.
- For more information on the investment climate in the Netherlands, please go to the following website of the U.S. Department of State <http://www.state.gov/e/eb/rls/othr/ics/2014/227893.htm>.
- Information on the investment climate in Belgium can be found at the following website, <http://www.state.gov/e/eb/rls/othr/ics/2014/226915.htm>.
- The following table will give you an overview of the main U.S. food companies (in alphabetical order) active in the Benelux market through joint ventures, acquisitions, etc.

Table 6: U.S. companies in the Benelux market

U.S. companies:	Product groups:
ADM	oilseeds, oils, fats, cocoa
Bruce Foods	tex-mex food products
Campbell Foods	soup
Cargill	orange juice, grains, oilseeds, oils, fats, soft drinks, starch, poultry, sugar, cocoa
Kraft	salad, convenience, coffee and confectionary products
Lamb Weston	potato
Master foods	confectionary products
PepsiCo	beverages, snacks, fats nuts, chips
Procter & Gamble	confectionery
Sara Lee	coffee, meat products
Simplot	potato
Smithfield	meat products

Source: FAS/The Hague

Consumer trends

- The Benelux has almost 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. In addition, within a radius of 200 miles from the Benelux border, the Benelux food processing industry has access to roughly 75 million affluent consumers, or 15 percent of the total EU population. This densely populated region covers important markets like North Rhine Westphalia, London and Paris. Germany, France and the UK continue to be important markets for the Benelux food processing industry.
- Over the past decades more and more women have entered the labor force. This has resulted in double-income households, where time has become scarce. In their spare time they want to focus on their family, friends and a healthy lifestyle. Spending hours on preparing meals is not on that priority list unless the preparation of the dinner is part of this spending time with family and friends.
- The double income households are willing to pay additional money for convenience, taste, variety, and health in 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 consumer trends 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 benefit from a good pension.
- The non-Dutch population in the Netherlands accounts for 20 percent and continues to grow annually by 2 percent whereas the population with Dutch ethnicity doesn't grow. As a result there has been strong growth in the number of stores serving ethnic niche markets and in demand for non-traditional Dutch food. The non-Belgian population in Belgium is much smaller and accounts for only 7 percent. More information on this subject can be found in GAIN Report - NL7021.
- 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. As a result there is demand for 'free from, low on and rich in' food ingredients. The following U.S. industries have all benefitted from this trend: nuts (pistachios, almonds, walnuts, etc.), (dried and fresh) fruits (cranberries, pomegranates, berries, etc.), seafood (salmon, halibut, etc.) and pulses.

SECTION III. COMPETITION

Table 7: Overall competitive situation for selected food ingredients in the Netherlands

Product Category	Leading Countries of Origins [+ USA], in value	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers

Alaska Pollock Fillets, Frozen (HS030475) Total Imports: 72 million \$ 22 thousand MT	[USA: 73%] China: 15%	The U.S. leads the supply of Alaska Pollack; Iceland, Norway and China are suppliers of cod; Iceland and China supply respectively coalfish and saltwater fish.	No or not enough local availability of price competitive fish fillets.
Cod, Frozen (HS030363) Total Imports: 113 million \$ 41 thousand MT	Russia: 55% Norway: 32% [USA: 12%]	All suppliers offer good quality cod.	No or not enough local availability.
Soybeans (HS120190) Total Imports: 1,908 million \$ 3,310 thousand MT	Brazil: 39% [USA: 32%] Paraguay: 11% Canada: 11%	South American origins are competitive throughout most of the year. U.S. bean production could be able to claim to be more sustainable.	The EU has only a minor production, which is insufficient to fulfill the domestic demand.
Peanuts, Shelled (HS120242) Total Imports: 591 million \$ 354 thousand MT	Argentina: 49% [USA: 20%] Brazil: 5% China: 7%	Argentina continues to dominate the market and supplies good quality peanuts.	No local supply.
Sunflower Seeds (HS120600) Total Imports: 387 million \$ 636 thousand MT	Bulgaria: 33% Romania: 26% Hungary: 18% France: 5% [USA: 4%]	Third country supply is price competitive at NW EU ports.	EU production of sunflower seed is limited.
Animal or Vegetable Fats, Oils & Their Fractions (HS151800) Total Imports: 468 million \$ 549 thousand MT	Germany: 31% [USA: 17%] Belgium: 10% UK: 9%	EU demand for oils and fats is growing due to biofuels production. Crushing is increasingly conducted in the country of origin.	EU production of rapeseed and sunflower seed is limited.
Odoriferous Substances (HS330210)	Ireland: 47% [USA: 15%] Germany: 14%	Odoriferous Substances are compounds (natural and synthetic) with odors used in the manufacture of various	EU suppliers don't have to pay import taxes and are closer to the market.

Total Imports: 306 million \$ 41 thousand MT	France: 7%	non-food and food products and are locally available.	
Peptones and Derivatives (HS350400) Total Imports: 172 million \$ 58 thousand MT	Belgium: 29% [USA: 25%] France: 11% Germany: 7%	Peptones are used by producers of food supplements and are locally available.	EU suppliers don't have to pay import taxes and are closer to the market.
Food Preparations (HS210690) Total Imports: 162 million \$ N.A.	Germany: 16% [USA: 16%] UK: 16%	Due to proximity, neighboring countries are leading suppliers of flavored or colored sugar, isoglucose, lactose, and glucose and maltodextrine syrups.	The U.S. is a competitive supplier of some food preparations.
Almonds (HS080212) Total Imports: 155 million \$ 23 thousand MT	[USA: 68%] Spain: 12%	Spain is an EU MS and located closer to the Netherlands than the U.S. The U.S. dominates the international almonds trade.	The food processing industry needs more almonds than Spain can supply. The production in the U.S. continues to grow and increasingly supplies Europe with high and consistent quality of almonds.
Pistachios (HS080251) Total Imports: 89 million \$ 10 thousand MT	[USA: 81%] Iran: 3%	The U.S. dominates the international pistachios trade.	According to industry sources Iran has experienced problems with aflatoxin in the past.
Cranberries (HS200893) Total Imports: 72 million \$ 21 thousand MT	[USA: 78%] Canada: 8% Chile: 7%	Main supplying countries of cranberries are the U.S., Canada and Chile. The market share of the first is 78 percent and growing.	The use of cranberries continues to grow. They are no longer just used in sauces but also in all kinds of food and drink products. The cranberry industry has been able to demonstrate the health advantages of drinking and eating cranberry products.

Source: Globe Trade Atlas, 2013 data

Table 8: Overall competitive situation for selected food ingredients in Belgium

Product Category	Leading Countries of Origins [+ USA], in value	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers
Almonds	[USA: 55%]	Spain is an EU MS and	The food processing industry needs

(HS080212) Total Imports: 109 million \$ 16 thousand MT	Spain: 26%	located closer to the Netherlands than the U.S. The U.S. dominates the international almonds trade.	more almonds than Spain can supply. The production in the U.S. continues to grow and increasingly supplies Europe with high and consistent quality of almonds.
Pistachios (HS080251) Total Imports: 68 million \$ 8 thousand MT	[USA: 74%] Iran: 15%	The U.S. dominates the international pistachios trade.	According to industry sources Iran has experienced problems with aflatoxin in the past.
Food Preparations (HS210690) Total Imports: 655 million \$ N.A.	Netherlands: 34% France: 20% Germany: 15% [USA: 6%]	Due to proximity, neighboring countries are leading suppliers of flavored or colored sugar, isoglucose, lactose, and glucose and maltodextrine syrups.	The U.S. is a competitive supplier of some food preparations.
Orange Juice (HS200912) Total Imports: 369 million \$ 712 thousand MT	Brazil: 77% [USA: 9%] Germany: 8% France: 4%	Belgium's import of fruit juices is dominated by citrus juice imports from Brazil.	No local availability of fruit and vegetable juices.
Durum Wheat (HS100119) Total Imports: 149 million \$ 388 thousand MT	Canada: 61% France: 20% [USA: 7%]	U.S. wheat is high protein wheat and therefore useful for bakery and pasta preparation	Of the locally produced wheat only a portion is suitable for the food processing industry, with the remaining destined for feed
Peptones and Derivatives (HS350400) Total Imports: 82 million \$ 18 thousand MT	[USA: 45%] Netherlands: 20% France: 10%	Peptones are used by producers of food supplements and are locally available.	EU suppliers don't have to pay import taxes and are closer to the market.
Protein Concentrates (HS210610)	[USA: 41%] Netherlands: 17%	Protein concentrates and textures protein substances from the U.S. are used by the	The U.S. is a competitive supplier of protein concentrates and textures protein substances.

Total Imports: 72 million \$ 14 thousand MT	UK: 13%	food processing industry.	
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Source: Globe Trade Atlas, 2013 data

SECTION IV. BEST PRODUCT PROSPECTS

Food ingredients present in the market which have good sales potential

- Nuts (almonds, peanuts, pistachios, walnuts, hazelnuts and pecans)
- Highly processed ingredients (dextrins, peptones, enzymes, lecithins and protein concentrates)
- Fish fillets (frozen fillets of Alaska Pollack, cod and hake)
- (fresh and processed) fruit and vegetables (cranberries, sweet potatoes, grapefruit)

Food ingredients not present in significant quantities, but which have good sales potential

- Ingredients for the natural and healthy foods industry
- Bakery products
- Dairy products (whey, milk powder)
- Millet, spelt and meslin
- Pulses

Food ingredients not present because they face significant barriers

- Poultry
- GMO derived ingredients that are not EU approved

Category A: Products Present in the Market Which Have Good Sales Potential

Product category	2013 Market Size (volume, '000 MT)	2013 Imports (sales, million \$)	5 year average annual import growth	Key constraints over market development	Market attractiveness for USA
Tree nuts	130	782	5%	The U.S. dominates international trade.	Growing demand and limited local production.
Cranberries	21	72	20%	Competition comes from Canada and Chile.	The use of cranberries continues to grow as they are used in all kinds of food and drink products due to its health advantages and no local production.

SECTION V. POST CONTACT AND FURTHER INFORMATION

If you have questions or comments regarding this report, or need assistance exporting to the Benelux, please contact the U.S. Office of Agricultural Affairs in The Hague:

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