

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY
USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT
POLICY

Required Report - public distribution

Date: 12/18/2017

GAIN Report Number: NL7042

Netherlands

Retail Foods

The Dutch Food Retail Market

Approved By:

Susan Phillips

Prepared By:

Marcel Pinckaers

Report Highlights:

The Dutch retail sector is characterized by heavy consolidation, the top two retailers control over 50 percent of the market, and a large number of smaller neighborhood stores. Consumers are increasingly looking for sustainable products, products that are healthy and convenience products. The Dutch will continue to buy more groceries online and private label brands. Borders between new food retail formats and innovative foodservice concepts are beginning to blur.

Post:
The Hague

SECTION I. MARKET SUMMARY

Dutch Food Retail Market

In 2016, the turnover of the Dutch food retail industry totaled \$43.1¹ billion. For 2017, turnover is expected to increase further due to the improving economy in the Netherlands and greater confidence in the economy among consumers.

Table 1. Turnover Dutch food retail, Billion USD

2011	2012	2013	2014	2015	2016
37.9	38.4	39.2	40.4	42.2	43.1

Source: www.cbl.nl

There are roughly 4,300 food retail outlets in the Netherlands providing over 260,000 jobs. Around 80 percent of all food retail outlets are full service supermarkets, operating on floor space between 500 and 1,500 square meters located downtown and in residential areas. Retailers with full service supermarkets have responded to the need of the Dutch to have these supermarkets close to their homes. The remaining 20 percent includes mainly convenience stores (near office buildings, city center, motorways and train/metro stations), some wholesalers and just a few superstores (conveniently located in shopping malls and industrial parks).

The top two food retailer formulas in the Netherlands, Albert Heijn and Jumbo, have a market share of 54 percent. The market of German discounters Aldi and Lidl combined has increased to 17 percent. Independent food retail stores are increasingly leaving the scene. Shrinking margins and on-going consolidation in the retail market drive this trend.

Table 2. Market Shares of Leading Food Retailers, in Percentage, 2016

Company:	Market share
Albert Heijn	35.3
Jumbo	18.4
Lidl	10.3
Aldi	7.0
Plus	6.2
Dirk	3.7
Coop	3.1
Emté	2.6
Deen	2.2
Hoogvliet	2.1
Dekamarkt	1.8
Spar	1.6
Jan Linders	1.1
Poiesz	1.0
Other	3.0
Total	100.0

Source: www.distrifood.nl/service/marktaandeelen

Current Availability of U.S. Products

¹ \$1=€0.85

The average Dutch supermarket offers the following products from the United States: wine, confectionary, tree nuts, cranberries, sweet potatoes, sauces, pulses and sauces.

The Netherlands' wine production is low and therefore depends on imports. Both old and new world wines are popular. Most supermarkets carry one or two U.S. brands (often Gallo and Barefoot). Retail prices for **white and red wines** from the United States vary from \$5.28 to \$7.05 per bottle. A wider range of U.S. wines, and mostly more expensive ones, can be found at liquor stores like market leader Gall & Gall and Grapedistrict. In addition there are a dozen independent wine boutiques per city that all offer a diverse range of wines from the United States.

Picture 1. Barefoot and Gallo wines



Source: FAS The Hague

Craft beer has gained popularity past few years. Dutch supermarkets sell some craft beer but their focus seems to be on regular lager beer often from Dutch, German or Belgian origin. Craft beers from the United States are predominantly sold via liquor stores and specialty beer shops. The latter tend to sell craft beer with more outspoken tastes (IPAs, Stouts, etc.) and from smaller and foreign breweries. Beer is increasingly competing with wine as a drink to serve with dining; there is also more attention on cooking with beer.

Picture 2. Magic Time products

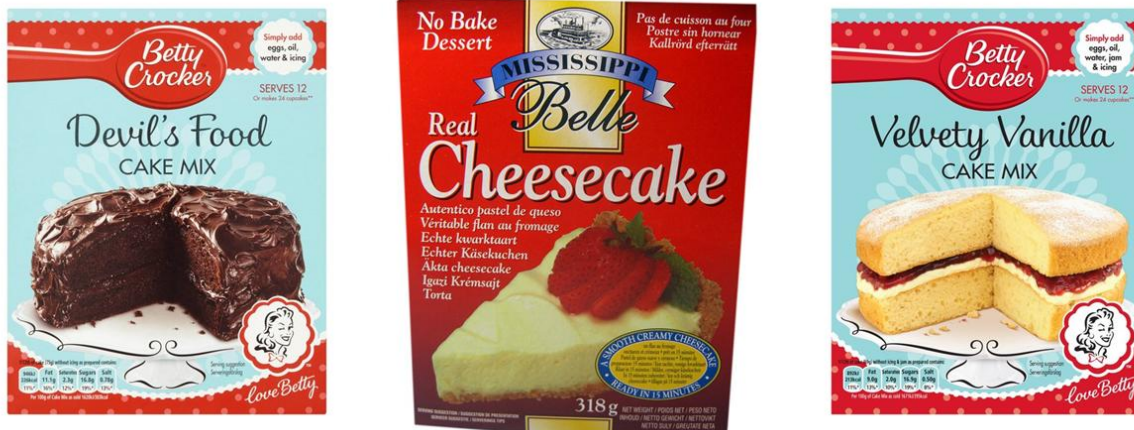


Source: FAS The Hague

Dutch supermarkets like Hoogvliet, SPAR and Jumbo all offer a special “U.S. Foods Section” while at other supermarkets a limited selection of **U.S. specialty foods** can be found in the category shelves. In particular SPAR and Hoogvliet both offer a wide selection of products from Magic Time, Reese’s, Hershey and Oreo. Jumbo on

the other hand offers several baking products from Betty Crocker and Mississippi Belle. Except for Aldi and Lidl, almost all supermarkets sell Tabasco red and green pepper sauces. Some retailers even sell more varieties, such Louisiana jalapeno pepper and chipotle hot sauces. Jumbo is the only Dutch supermarket that sells BBQ sauces from the United States, all other supermarkets sell U.S. inspired BBQ sauces that are produced in the Netherlands.

Picture 3. Betty Crocker and Mississippi Belle products



Source: FAS The Hague

Tree nuts are no longer used only by the food processing industry. Almonds, walnuts, pistachios and pecan nuts are increasingly being sold as a snack, in packages ranging from 100 to 200 grams. The nuts are also often mixed with for instance dried fruit. Nuts-based healthy snack bars are also popular in the Netherlands and can be found at all supermarkets. The United States is a big supplier of tree nuts although there is competition from Spain, France, Moldova and Romania.

Picture 4. Tree Nuts at Albert Heijn



Source: FAS The Hague

Pulses are also gaining popularity in the Netherlands. Supermarkets often sell pulses (dry goods) in small bags of 400 grams. Popular are pulses in tins or pouch packaging which are ready to use. Consumer like these pulses in particular as they are already prepared and can be used for salads, soups and stews. European brands HAK and Bonduelle are both active in this segment.

Almost all Dutch supermarkets sell **sweet potatoes**, rapidly becoming a conventional product. Although the majority comes from the United States, some supermarkets carry sweet potatoes from Spain and Honduras as well. Retail prices vary from \$2.34 to \$3.51 per kilo while organic sweet potatoes from Spain are sold for \$4.68 per kilo.

Grapefruits can also be found at all supermarkets and nowadays come from Israel, Spain and South Africa. Jumbo and Coop are the only Dutch retailers that offer fresh cranberries, and in both cases from the United States.

Frozen Pacific wild salmon can also be found at all supermarkets, except for SPAR. The most common quantity offered is 250 gram for on average \$2.93.

Trade In Food Products

The Netherlands is a small country geographically but some of the largest European food processing companies have facilities here. The Netherlands is the perfect gateway for U.S. products due to the presence of the Port of Rotterdam, Amsterdam Airport Schiphol, the confluence of two European rivers and an excellent road and railway infrastructure. The Dutch are known for their expertise in transportation and logistics.

The Netherlands is the second largest exporter of agricultural products in the world after the United States and before Germany. These exports include agricultural products produced in the Netherlands, such as flowers and plants, and also imported agricultural products that are re-exported, directly or after further processing, like fruit and cocoa products.

In 2016, total Dutch agricultural imports were valued at \$59.1 billion. Imports from the United States totaled \$2.9 billion, up for the fifth consecutive year. Imports of U.S. rice, fresh vegetables, fruit and vegetable juice, prepared foods, condiments & sauces, fish and beverages were all up. Dutch imports during the first eight months of 2017 compared to the same period last year are up by 20 percent. Also Dutch imports from the United States were up by six percent.

Table 3. Dutch Imports of Agricultural, Fish and Forestry Products, Million USD

	2012	2013	2014	2015	2016
Total imports	62,563	64,604	65,332	59,447	59,121
Imports from U.S.	2,258	2,582	2,750	2,844	2,943

Source: World Trade Atlas

The Netherlands is the largest export market in the EU for U.S. products. Other important EU markets are the United Kingdom, Germany, Spain and Italy. U.S. exports to the Netherlands (\$14.6 billion) represented 20 percent of all U.S. exports to the EU.

This report's focus is on food retail ready products within the following product categories: bulk, intermediate, consumer-oriented and fishery products. The United States is the 6th largest supplier of consumer-oriented products to the Netherlands after Germany, Belgium, Brazil, France and Spain. Dutch imports of consumer-oriented products from the United States continued to grow until 2015. Imports in 2016 were similar to those in 2015 (\$1,231 million). Imports figures during the first eight months of 2017 however demonstrate that Dutch imports are down by almost nine percent, driven by lower imports of almonds, pistachios and tomato paste.

The United States is the 8th largest supplier of seafood products to the Netherlands. U.S. exports of seafood products to the Netherlands also continued to grow until 2015 (\$140 million) but dropped in 2016 to \$131 million, mainly due to decreasing frozen cod exports. The Netherlands however continues to be a growth market for U.S. cuttlefish & squid, frozen fish fillets, lobster, shrimp & prawns and sockeye salmon.

Table 4. Dutch Imports of Consumer Products, 2016

Partner Country	USD	%
Germany	5,280,297,790	17
Belgium	4,185,439,773	14
Brazil	1,706,349,006	6
France	1,669,356,377	5
Spain	1,507,670,827	5
United States	1,228,985,057	4
United Kingdom	1,066,929,433	3

Table 5. Dutch Imports of Fishery Products, 2016

Partner Country	USD	%
Iceland	414,125,730	13
Germany	295,696,145	9
Russia	245,462,630	7
Norway	207,437,352	6
Belgium	186,533,340	6
Vietnam	167,961,179	5
China	136,966,047	4

South Africa	1,053,193,773	3	United States	131,434,519	4
Italy	981,171,065	3	Turkey	125,104,486	4
Poland	809,130,391	3	India	118,184,498	4
Other	11,252,854,046	37	Other	1,199,011,838	37
World	30,741,377,538	100	World	3,227,917,764	100

Source: World Trade Atlas

The United States is also a top ten supplier of intermediate products to the Netherlands dominated by fats & oils, odoriferous substances and peptones. In 2016, Dutch imports of intermediate products from the United States were up by almost three percent. The United States is the largest supplier of bulk products to the Netherlands, although these are mainly soybeans for the compound feed industry. Ingredients used by food companies in this category include pulses and rice.

Table 6. Dutch Imports of Intermediate Products, 2016

Partner Country	USD	%
Germany	2,639,366,313	20
Belgium	1,277,304,389	10
Indonesia	993,021,537	8
Brazil	980,686,839	8
France	761,555,886	6
Malaysia	653,093,999	5
United States	566,818,116	4
Argentina	504,323,948	4
Philippines	393,249,543	3
Cote d Ivoire	354,764,137	3
Other	3,944,044,391	30
World	13,068,229,098	100

Table 7. Dutch Imports of Bulk Products, 2016

Partner Country	USD	%
United States	984,616,138	10
Brazil	981,657,451	10
Cote d Ivoire	965,672,786	10
France	665,759,599	7
Germany	647,487,632	7
Belgium	562,639,917	6
Ghana	545,019,981	6
Nigeria	383,872,329	4
Argentina	357,185,943	4
Cameroon	356,179,952	4
Other	3,194,228,479	33
World	9,644,320,207	100

Source: World Trade Atlas

Table 8. The Number and Type of retail Outlets in the Netherlands

Type of outlet:	Number of Stores:	Average floor space (M2):
Convenience Stores	665	<500
Supermarkets	3,443	500 – 1,500
Superstores	94	1,500 – 5,000
Wholesalers and Department Stores	95	>5,000

Source: Distrifood Retailplanner and FAS The Hague

Demand for Sustainable Food Products Is Up

During the last decade, Dutch food retailers have increasingly sourced food products which are either produced sustainably or obtained in a sustainable manner. Wageningen University and Research publishes annually the “Monitor Duurzaam Voedsel” report which gives an overview of consumer spending on sustainable food in the Netherlands. Total consumer spending on foods certified as sustainable grew by 26 percent in 2016 to over \$4.2 billion. The share of sustainable food compared to total spending on food grew from eight percent in 2015 to ten percent in 2016. Sustainable food continues to be the most important growth market in the Dutch food industry. The consumption of certified sustainable products is expected to continue to increase. A wider range of certified products and changing consumer preferences by paying more attention to sustainability and health, explains the

growth in spending on these products. Most of the spending takes place in the supermarket, mainly due to wider availability of sustainable products. The “Monitor Duurzaam Voedsel 2017”, detailing the 2016 figures, can be found at agrimatie.nl.

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 (52 percent), the U.K. (46 percent) and Germany (45 percent). The Netherlands had a market share of 30 percent.

The market share of private label is high in retail markets that are highly consolidated and innovative. Several retailers in the Netherlands 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.

Picture 5. The Private Label Market Share in Several European Countries



Source: <http://www.plmainternational.com/industry-news/private-label-today>

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; the next edition is scheduled for May 28 – 30, 2018. Please contact us should you require more information about the show and also check if your commodity cooperator or State Regional Trade Group is planning on participating.

On-Line Shopping Offers Potential

The market for shopping on-line as a percentage of the total food retail is three percent which is still small but growing. According to industry contacts, it is this part of the market which offers great potential. At the moment one out of six households occasionally shops its groceries online. The largest market in Europe for on-line shopping of food products is the U.K. In the Netherlands, Ahold’s Albert.nl acquired market leader Bol.com to further tap into the on-line shopping market. DeKa drive (shop-online and pick up groceries 7 days a week at the DeKa drive, www.dekadrive.nl) recently announced it plans to open more DeKa drives within the next few year. Consumers in the age group 18-44 years shop most on-line driven by saving time and money. Key though for on-

line shopping is a high quality on-line experience and a reliable delivery of the purchased goods. Shopping by using smart phones and tablets has boosted sales in the past five years.

Blurring Boundaries

Especially in the cities, consumers are shopping at different times and locations. Breakfast is often bought on the way to work. During lunch breaks, people decide what they like to eat for lunch and buy it on the spot. Dinner is increasingly bought on the way to home. As a result innovative convenience stores, either small independent or part of a larger chain, are opened near metro/train stations, schools, office buildings and shopping malls. The traditional neighborhood grocery stores are, in order to survive, offering more and more meal components and ready-to-eat meals. Consumers request regional cuisine products (Asian, Italian, Tex-Mex, etc.) and overall tasty and fresh food. These new convenience stores are in fact not so much competing with traditional supermarkets but more so with foodservice concepts.

Awareness of Health and Well-Being

Consumers are becoming more aware of and are more concerned about the effects food has on their health and well-being. There is a trend to a healthier lifestyle in Western countries. The following U.S. industries have all benefitted from this trend: healthy food snacks ('free from, low on and rich in' products), tree nuts (pistachios, almonds, walnuts, etc.), so-called super fruits (cranberries, pomegranates, other berries) and pulses. Consumers are looking for and finding more information on this topic; the media, including the Internet, TV and magazines, respond to this desire and feed into it. Bloggers and vloggers are rapidly gaining power in influencing consumers. Food retailers play a crucial role as well, as they market food products to create, anticipate and meet consumers' needs.

Table 9. Advantages and Challenges of the Dutch Food Retail Market

Advantages	Challenges
<i>Sector Strengths & Market Opportunities</i>	<i>Sector Weaknesses and Competitive Threats</i>
Turnover figures indicate that the Dutch retail market is solid and strong.	The industry is highly consolidated and therefore has a strong negotiating position.
Affluent, open minded and curious consumers create opportunities for new products.	Discounters fare well in the Dutch retail market and the Dutch like to spend their money wisely.
Due to its location, infrastructure and facilities the Netherlands is a trading hub. Importers make purchasing decisions valued at hundreds of millions of USD for Consumer-Oriented products that are transshipped to other European countries.	Listing fees paid to retailers and money spent on creating brand awareness hamper the introduction of new U.S. brands.
Sustainable food (including organic food) is one of the most important growth markets.	Sustainability certification can be costly and onerous. Dutch import regulations and standards

Source: FAS The Hague

SECTION II. ROAD MAP FOR MARKET ENTRY

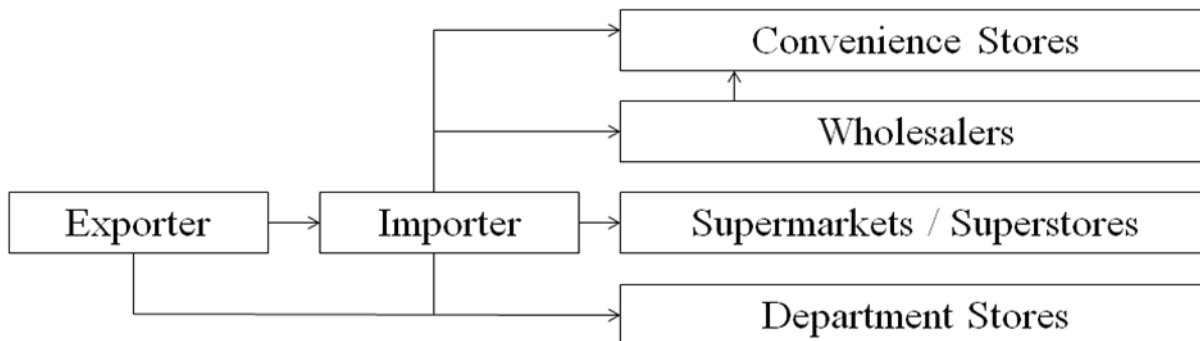
U.S. exporters seeking to enter the Dutch market place have many opportunities, as indicated in the above table. However there are a number of challenges U.S. exporters must meet before exporting to the Dutch market.

Entry Strategy

Success in introducing your product in the Dutch market depends mainly on knowledge of the market and building personal contact with knowledgeable and established importers. An importer knows the market, the trade barriers and the required documentation. Prior to any export, invest in research that analyzes the Dutch food culture (concepts, flavor, price, requirements). Once the product has been chosen, be aware of fierce competition. There are tariff and non-tariff trade barriers that can complicate exporting to the Dutch market. The EU also has

several FTAs which may advantage other 3rd country competitors. FAS The Hague offers guidelines on business practices and import regulations and also maintains lists of Dutch buyers (FBL lists).

Market Structure:



Source: FAS The Hague

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

Retailers increasingly have their stores divided in different categories. For each category they will have two or three preferred suppliers who are responsible for supplying the full range of products within the category. This way, the retailer negotiates with just a handful of suppliers for fruits & vegetables, meat products, seafood products, groceries, beverages, bakery products, etc. For the international specialty products (covering branded retail ready U.S. products) area within supermarkets, retailers usually work with only a few specialized importers who are responsible for selecting products and filling those shelves.

As described in Section I, the Dutch retail industry is rather consolidated; however, on the purchase side the industry is even more consolidated since several smaller food retailers have joined forces. The following figures will give you an overview of the different buying combinations in the Netherlands.

Table 10. Leading Buying Groups in the Netherlands

Purchase Group:	Market Share, percentage:	Company name:
Albert Heijn Provincialeweg 11 1506 MA Zaandam www.ah.nl	35.2	Albert Heijn, AH XL, Albert.nl, AH To Go
Superunie Industrieweg 22B 4153 BW Beesd www.superunie.nl	29.6	Plus Holding, Deen Supermarkten, Coop Holding, Hoogvliet Super, Spar Holding, Boni-Markten, Boon Beheer, Detailresult Groep, Jan Linders, Nettorama Distributie, Poiesz Supermarkt, Sligro Food Group
Jumbo Groep Holding Rijksweg 15 Veghel, 5462 CE The Netherlands www.jumbo.com	18.4	Jumbo

Lidl Huizermaatweg 45 1273 NA Huizen www.lidl.nl	10.3	Lidl
Aldi Holding Pascalweg 21 4104 BE Culemborg www.aldi.com	7.0	Aldi

Source: Distrifood Retailplanner 2015/2016

A. SUPER STORES, SUPERMARKETS, HYPER MARKETS OR SUPER CENTERS, CLUBS AND WAREHOUSE OUTLETS

Table 11. Supermarkets and Super Stores (in alphabetic order)

Name	Format	Stores	Ownership	Locations
Albert Heijn	Supermarket	850	Royal Ahold	Nation wide
Aldi	Supermarket	496	Aldi	Nation wide
Amazing Oriental	Supermarket	17	Oriental Holding	Nation wide
Boni	Supermarket	42	Sligro Food Group	Regional
Coop	Supermarket	183	Coop Cooperative	Nation wide
Deen	Supermarket	70	Deen	Regional
Dekamarkt	Supermarket	83	Detailresult Groep	Regional
Dirk	Supermarket	106	Detailresult Groep	Nation wide
EkoPlaza	Supermarket	71	Udea	Nation wide
Emté	Supermarket	130	Sligro Food Group	Nation wide
Hoogvliet	Supermarket	65	Hoogvliet	Regional
Jan Linders	Supermarket	58	Jan Linders	Regional
Jumbo	Supermarket	540	Jumbo	Nation wide
Lidl	Supermarket	400	Lidl	Nation wide
Marqt	Supermarket	13	Quirijn Bollen	Regional
MCD	Supermarket	32	Boon Beheer	Regional
Nettorama	Supermarket	31	Nettorama	Nation wide
Poiesz	Supermarket	68	Poiesz Supermarkten	Regional
Plus	Supermarket	255	Sperwer Groep	Nation wide
AH XL	Super Stores	35	Royal Ahold	Nation wide
Jumbo Foodmarkt	Super Stores	2	Jumbo	Regional

Supermarket - retail surface \leq 1,500 m²

Super Stores - retail surface $>$ 1,500 m²

Department Stores

Table 12. Department Stores

Name	Stores	Ownership	Locations
Bijenkorf	7	Selfridges	Nation wide
HEMA	530	Lion Capital LLP	Nation wide
Hudson's Bay	20	Hudson's Bay	Nation wide

Discounters

Table 13. Discounters

Name	Stores	Ownership	Locations
Aldi	496	Aldi-Gruppe	Nation wide
Lidl	400	Lidl & Schwarz	Nation wide

Dekamarkt	83	Detailresult Groep	Nation wide
Dirk	106	Detailresult Groep	Nation wide

B. CONVENIENCE STORES, GAS MARTS, KIOSKS

Table 14. Convenience Stores

Name	Ownership	Locations
AH To Go	Royal Ahold	Regional
CoopCompact	Coop Cooperative	Nation wide
Recreatiemarkten	Van Tol Retail	Nation wide
Spar City Store	Spar Holding	Regional
Lekker Makkelijk	Van Tol Retail	Nation wide
Buurtwinkels	Van Tol Retail	Nation wide
Attent	Spar Holding	Nation wide
Attent Super op Vakantie	Spar Holding	Nation wide

Source: AC Nielson

Table 15. Gas Marts

Name	Ownership	Gas Company	Locations
On the Run/Snack & Shop	ExxonMobil	ESSO	Nation wide
Shell Station	Shell	Shell	Nation wide
GO shops – the fresh way	Chevron	Texaco	Nation wide
Café Bonjour	Total	Total	Nation wide
M&S	Marks & Spencer	BP	Regional
Wild Bean Café	British Petroleum	BP	Nation wide

Source: AC Nielson

Table 16. Wholesalers

Name	Ownership	Locations
Zegro	Zegro	Regional
Hanos	Royal Ahold	Nation wide
VHC - Horesca	Maxxam C.V.	Nation wide
Bidfood	Bidfood	Regional
Makro	Metro Cash & Carry	Nation wide
Sligro	Sligro Food Group	Nation wide
De Kweker	De Kweker	Amsterdam

C. TRADITIONAL MARKET – “MOM AND POP” SMALL INDEPENDENT GROCERY STORES AND WET MARKETS

Grocery stores, butcher stores, bakeries etc. increasingly face competition from food retail chains. Through extra service, sales of high-quality added value products and the service of niche markets, they try to survive. Traditional butcher shops and fruit & veggie shops are becoming specialty shops and high-end caterers, while traditional bakery shops are moving into pastry and artisanal specialty breads.

SECTION III. COMPETITION

Below table summarizes the competitive situation that U.S. suppliers face in the Dutch food processing sector in terms of locally produced goods and imports and their respective market shares. In addition, the strengths of supplying countries and also the advantages and disadvantages of local suppliers are discussed.

Table 17. Netherlands' U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented and Fish & Seafood Products, (U.S. exports), Million USD, 2016

Product Category	Main Suppliers, in percentage		Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Breakfast Cereals (PG30) Total Imports: USD 175 From USA: USD 0.3	1. Belgium 2. Germany 3. The U.K. 15. USA	44 23 17 0.2	1, 2 and 3 are close to market and offer different good quality products.	Local suppliers don't offer specialty products
Snack Foods (PG31) Total Imports: USD 1,750 From USA: USD 27	1. Belgium 2. Germany 3. Poland 7. USA	36 25 7 2	1 and 2 are close to market and offer different good quality products. The growing Polish population in the Netherlands prefers snack foods from Poland.	Developed confectionary industry
Meat Products (HS02) Total Imports: USD 4,552 From USA: USD 155	1. Germany 2. Belgium 3. Brazil 10. USA	24 11 11 3	1,2: distance and availability 3: price/quality ratio	For local producers beef is a side product since their focus is on dairy production.
Seafood Products (HS03) Total Imports: USD 3,073 From USA: USD 121	1. Iceland 2. Germany 3. Russia 9. USA	13 12 8 4	1: they offer seafood for the sophisticated food processing industry	Long tradition in seafood trading; Good geographical location
Dairy Products (HS04) Total Imports: USD 3,840 From USA: USD 7	1. Germany 2. Belgium 3. France 21. USA	37 22 9 0.2	1,2 and 3: Proximity	Great tradition of producing milk and milk based processed products
Vegetables (HS07) Total Imports: USD 2,668 From USA: USD 77	1. Spain 2. Belgium 3. Germany 8. USA	23 17 16 3	1: different climate/varieties 2,3: proximity	Great innovative industry producing horticultural products
Fruit	1. S.	12	1,2 and 3: different climate/supply	Products not (sufficiently)

(HS08) Total Imports: USD 7,219 From USA: USD 357	Africa 2. Chile 3. Spain 8. USA	8 7 5	season/taste/varieties	available on the local market
Coffee, Tea and Spices (HS09) Total Imports: USD 1,604 From USA: USD 9	1. Belgium 2. Germany 3. France 23. USA	25 20 9 0.6	1, 2: trading tradition	No domestic availability
Preparations of Meat and Fish (HS16) Total Imports: USD 1,743 From USA: USD 13	1. Belgium 2. Germany 3. Brazil 20. USA	19 14 14 0.8	2: price/quality ratio	Not (sufficiently) domestically available
Preparations of Cereals (HS19) Total Imports: USD 2,176 From USA: USD 20	1. Belgium 2. Germany 3. France 16. USA	28 24 7 1	Proximity and re-export	Not (sufficiently) domestically available
Preparations of Vegetables and Fruit (HS20) Total Imports: USD3,444 From USA: USD 176	1. Brazil 2. Belgium 3. Germany 5. USA	17 13 13 5	Price/quality ratio	Not (sufficiently) domestically available
Other Edible Preparations (HS21) Total Imports: USD 2,493 From USA USD 231	1. Germany 2. Belgium 3. The U.K. 4. USA	22 16 10 9	Proximity and re-export	Not (sufficiently) domestically available
Beverages (HS 22) Total Imports: USD 4,183 From USA: USD 106	1. Germany 2. Belgium 3. France 8. USA	21 18 15 3	Excellent regional products	Not (sufficiently) domestically available

Source: www.gtis.com

SECTION IV. BEST PRODUCT PROSPECTS

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

- Nuts (almonds, peanuts walnuts, pistachios, pecan and hazelnuts)
- Fruit juices (orange and grapefruit)
- Beverages
- (Super) Fruits containing high levels of antioxidants like pomegranates, all berries, etc.
- Craft beers
- Dried fruits (dates, figs, cranberries, raisins)

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

- Functional/health foods
- High value organic products
- High value beef cuts and hamburgers (Non-Hormone Treated Cattle Program)
- Innovative sauces, condiments and confectionary products

C. Products Not Present Because They Face Significant Barriers

- Poultry (sanitary procedures)
- Processed food with GMO ingredients, bleached flour etc.

SECTION V. POST CONTACT AND FURTHER INFORMATION

United States Department of Agriculture - Foreign Agricultural Service
U.S. Embassy
Marcel Pinckaers
*Lange Voorhout 102, 2514 EJ The Hague, The Netherlands
Phone: +31 (0)70 3102.305
E-mail: marcel.pinckaers@fas.usda.gov

*after January 28, 2018 the new address will be: John Adams Park 1, 2244 BZ Wassenaar.

Additional FAS GAIN Reports can be downloaded from the FAS website:
<http://www.fas.usda.gov/scriptsw/attacherep/default.asp>