

Netherlands Food Report Q4 2010

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Date: September 2010

Pages: 61

Price: US\$ 1,295.00 (Single User License)

ID: NA78FAEBE0FEN

Abstracts

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The Dutch economy has returned to growth in 2010 and data from the Central Bureau for Statistics suggest that the economic recovery has gained traction in the latest quarter. This growth has had a positive impact on consumer confidence, which has advanced significantly since the start of the year. However, with confidence unlikely to reach pre-crisis levels for many months, the Dutch food and drink sector is likely finding the operating environment tough in 2010 and a focus on price is going to continue playing an important role. Looking further ahead, the Dutch consumer sector appears to be better positioned than many of its regional neighbours to register growth beyond 2010. Relatively strong growth forecasts and a favourable business environment explain why the Netherlands is at the top of our Food & Drink Risk/Reward Ratings for the Western Europe region.

Headline Industry Data

2010 per capita food consumption = 1.9%; forecast to 2014 = 16.8%

2010 alcoholic drink sales = 2.8%; forecast to 2014 = 25.1%

2010 soft drink sales = 1.1% ; forecast to 2014 = 24.8%

2010 mass grocery retail sales = 3.0%; forecast to 2014 = 33.2%

Key Industry Trends & Developments Netherlands positioned as R&D hub – In May 2010, France-based Groupe Danone announced plans to open a new innovation centre in the Netherlands to strengthen its expertise in the areas of baby nutrition and medical

nutrition. The facility will consolidate the firm's existing Dutch-based research and development (R&D) activities and is expected to open in 2012. As well as highlighting Danone's commitment to the area of functional nutrition, the move demonstrates the Netherlands' strength as an R&D hub for some of Europe's largest food and drink (F&D) companies.

Consolidation in retail – In July 2010, Netherlands-based retailer Sligro announced the acquisition of supermarket operator Sanvier for around EUR50mn. The acquisition is part of a consolidation process in the Dutch retail sphere, which has resulted in significant merger and acquisition activity over the past 12 months. The current increase in consolidation activity was kick-started in late 2009, when family-owned Dutch supermarket group Jumbo launched a successful bid for its larger domestic rival Super De Boer. The move meant that Jumbo leapfrogged Sligro and Schuitema to become the country's second largest retailer behind market leader Ahold (which controls nearly 40% of the market).

Key Risk to Outlook

Export Recovery – There are upside risks to our short-term forecasts as the timing of the anticipated slowdown in export growth is difficult to gauge. Our core view is for deterioration in the external environment over H210 as global growth slows, macroeconomic headwinds mount in China and fiscal consolidation takes effect across the eurozone. Nonetheless, the rebound in export volumes has been robust in 2010 so far and further strength in the coming months would present upside risks to our headline GDP growth forecasts and hence our consumption outlook.

Eurozone debt crisis – On the other hand, the ongoing eurozone crisis poses a threat to investor confidence towards the entire region. The risk of a major sovereign credit event in Europe would further damage confidence, putting significant pressure on export demand and therefore on the Netherlands' economic growth and consumption.

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