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Report Highlights:

The exporter guide provides an economic and market overview, as well as demographic trends and practical tips to U.S. exporters on how to conduct business in the Netherlands. The report additionally describes three market sectors (food retail, food service, and food processing), the best market entry strategy, and the best high-value product prospects, and focuses exclusively on consumer-oriented products. Additional reports referenced herein can be found at the following website:
<https://gain.fas.usda.gov/#/search>.

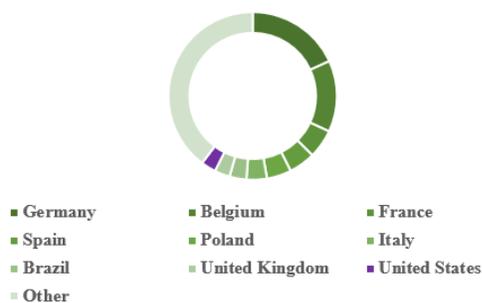
Market Fact Sheet: The Netherlands

Executive Summary:

Although the Netherlands is a small country geographically, it is the gateway for U.S. products into the European Union (EU). It is also the EU's largest importing country and continues to be the second largest exporter of agricultural products in the world.

Imports of Consumer-Oriented Products:

Products from other EU Member States lead Dutch imports of consumer-oriented products. In 2022, the United States was the ninth largest supplier of these products to the Netherlands, with imports valued at over \$1.5 billion.



Source: Trade Data Monitor

Food Processing Industry:

About 8,435 food companies generated net sales of \$98 billion in 2022. The industry has been a steady supplier of jobs in the Netherlands (152,000) and the number of food companies continues to grow due to an increasing number of small food companies.

Food Retail Industry:

The Dutch retail sector is rather consolidated, employing over 300,000 people, and operating in an estimated 4,500 stores. The sector's turnover for 2022 is forecasted \$48.7 billion. Due to the increased costs of living, consumers are looking for products on sale and moving from branded products to private labeled products. Cheaper further processed variants are gaining popularity as well as discount stores. Interest in shopping for groceries on-line continues to grow.

Foodservice – HRI Industry:

Despite the rising costs of living, the Dutch foodservice industry's turnover is back on track. Last year, total sales were valued at \$15.6 billion and exceeded the pre-pandemic level for the first time. Consumers returned en-masse to HRI foodservice outlets and picked up their social life they led prior to the pandemic.

Quick Facts CY 2022

Imports of Consumer-Oriented Products, total:
\$52.9 billion

List of Top 10 Growth Products in the Netherlands (imported from the World):

- | | |
|----------------------|------------------|
| 1. Cocoa beans | 6. Bananas |
| 2. Food preparations | 7. Baked goods |
| 3. Fats and oils | 8. Ethyl alcohol |
| 4. Wheat and meslin | 9. Cheese |
| 5. Meat | 10. Coffee |

Food Industry by Channels 2022, in \$ billion:

Consumer-Oriented Products Imports	\$53
Consumer-Oriented Products Exports	\$97
Agricultural & Related Products Imports	\$113
Agricultural & Related Products Exports	\$150
Food Industry	\$98
Food Retail	\$49
Food Service	\$16

Top 10 Food Retailers in the Netherlands, Market Share:

Albert Heijn	35.9%	Dirk/Deka	5.1%
Jumbo	21.8%	Hoogvliet	2.0%
Lidl	10.7%	Spar	1.2%
Plus/Coop	10.4%	Jan Linders	1.1%
Aldi	5.2%	Poiesz	1.0%

GDP/Population:

Population: 17.9 million
GDP: \$1,021 billion
GDP per capita: \$57,039

Strengths/Weaknesses/Opportunities/Challenges

Strengths:

U.S. producers offer a great variety of food products that have a great story to tell about sustainability, farm to table supply chains, and their heritage.

Opportunities:

There is a growing demand for healthy and nutritious food products and product with a special claim and sustainable production method.

Data and Information Sources: Trade Data Monitor, industry experts, company websites

Contact: FAS The Hague, agthe Hague@fas.usda.gov

Weakness:

Transatlantic transportation is costly and takes time. Some U.S. food products suffer from a negative perception among Dutch consumers due to misinformation.

Threats:

There is fierce competition on price, quality, uniqueness, and innovation from other EU member states.

SECTION I. MARKET OVERVIEW

Population and Key Demographic Trends

At the end of 2023, the Dutch population is expected to total 18 million, and is forecast to continue to grow by over 100,000 people annually to 19 million in 2034. The population growth is mainly due to immigration and increasing lifespans. By 2050, roughly a quarter of the population will be 65 years and older. Not only is this group of consumers growing, but they are also expected to be more affluent, more active, and more experimental with food than ever before.

About half of the Dutch population currently lives in cities and the overall trend of moving to urban areas is expected to continue. Between 2024 and 2034, the Dutch population will grow by another million, of which three-quarters are expected to be born in cities. The population of Amsterdam alone will grow by 150,000 and have more than 1 million inhabitants in 2036. Currently the mean population density is 517 inhabitants per square kilometer, making the Netherlands the second most densely populated country, after Malta, in the European Union.

In 2023, there were 8.3 million households, of which 3.3 million were single-person households. This means that 18 percent of all residents have a single-person household. On average, 2.12 people live in a Dutch household, while sixty years ago the average household size was 3.52. Single-person households now account for 40 percent of all households, and this number is expected to continue to rise. In Amsterdam, 55 percent of all households are already one-person households. The aging Dutch population is expected to want to live independently for as long as possible. At the same time, over half of the people who live alone have never been in a long-term relationship and are not planning on doing so. An older and more individual population that increasingly lives in urban areas is expected to lead to an increased demand for innovative products, smaller portions, healthy and nutritious food options, functional foods, and affordable convenience.

Economy Size, Purchasing Power, and Consumer Behavior

The Netherlands in a Nutshell

The Netherlands is a small country in **Error! Hyperlink reference not valid.**, bordering **Error! Hyperlink reference not valid.** to the east, **Error! Hyperlink reference not valid.** to the south, and the **Error! Hyperlink reference not valid.** to the northwest. The largest and most important cities in the Netherlands are **Error! Hyperlink reference not valid.**, **Error! Hyperlink reference not valid.**, **Error! Hyperlink reference not valid.**, and Utrecht, together referred to as the Randstad. Amsterdam is the **Error! Hyperlink reference not valid.**, while **Error! Hyperlink reference not valid.** is home to the Dutch seat of **Error! Hyperlink reference not valid.** and **Error! Hyperlink reference not valid.**. The Netherlands' name literally means "**Error! Hyperlink reference not valid.**," influenced by its low land and flat geography, with only half of its land exceeding one meter **Error! Hyperlink reference not valid.**.

Dutch Traders are Key in Distributing U.S. Exports Throughout the EU

The Netherlands is the largest importing country within the European Union (EU) and continues to be 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 and imported products that are re-exported, often after sorting, repacking, or further processing. The port of Rotterdam is the world's 11th largest seaport and Amsterdam Schiphol is Europe's fourth largest airport. Two of

Europe’s largest rivers, the Maas and the Rive, run via the Netherlands to the North Sea. Moreover, the Netherlands has an excellent rail, river, and road infrastructure.

The GDP of the Netherlands is estimated at \$1,021 billion, or \$57,039 per capita. The Dutch [Netherlands Bureau for Economic Policy Analysis](#), or CPB in Dutch, publishes the most recent figures and forecasts about the Dutch economy, purchasing power, unemployment rate, and other national statistics. More detailed information about the Dutch consumer market and consumer behavior can be found Sections II and IV.

Overall Business Climate

The fundamental strengths of the Dutch economy continue to be the Netherlands’ stable political climate, highly developed financial sector, strategic location, a well-educated and productive labor force, and high-quality physical and communications infrastructure. On September 19, 2023, or [Budget Day](#), the caretaking government presented its plans in the [Budget Memorandum](#). These plans should lead to an improvement in the purchasing power of those with lower incomes and prevent an increase in the number of people below the poverty line. Since the measures are funded by increases in the financial burden, the government deficit remains unchanged, compared to earlier projections. Additional information on the overall business climate in the Netherlands can be found on the website of the CPB at: **Error! Hyperlink reference not valid.** On November 22, 2023, general elections were held to elect the members of the House of Representatives, followed by the process of cabinet formation.

[Table 1. Advantages and Challenges U.S. Exporters Face in the Netherlands](#)

Advantages (U.S. supplier strengths and market opportunities)	Challenges (U.S. supplier weaknesses and competitive threats)
Local traders and food processors prefer to work with U.S. suppliers because they are professional and deliver products with a consistent and high quality. U.S. companies also have a great variety of products to offer.	Growing demand for single-portion packaged food products. U.S. companies tend to manufacture packaged food in larger packages. A standard U.S. label on food products fails to comply with EU labeling requirements.
Growing demand for food products with a special claim, certification, and sustainable production methods. U.S. farmers have a good story to tell about sustainability, their supply chain (farm to table), and their State/regional heritage (provenance).	The Dutch are price-conscious consumers. Transatlantic transportation is costly. Products from the United States are subject to import tariffs ¹ . Suppliers from other EU member states have a competitive advantage on tariffs and non-tariff trade barriers, transportation costs, and transportation time.
Growing demand for comfort food, innovative food concepts, and international cuisine. Many U.S. products are innovative, often trend setting, and known for their strong brands.	Some U.S. food products suffer from a negative perception among Dutch consumers due to misinformation or an image issue (e.g., U.S. foodstuffs are considered unhealthy).
The Netherlands is the most important	U.S. beef from hormone-treated cattle,

¹ Retaliatory tariffs: The WTO allowed the EU to raise additional tariffs up to \$4 billion worth of imports from the United States.

gateway for U.S. products to the European Union.	poultry, and products containing GMO derived ingredients that are not EU approved cannot be exported to the Netherlands.
Growing demand for nutritious, fresh, and food products that contribute to a healthier lifestyle.	The EU has several Free Trade Agreements that may advantage other 3rd country competitors, including Canada and Mexico.
	Fierce competition on price, quality, uniqueness, and innovation.

Source: FAS/The Hague

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs and Trends

Most Dutch entrepreneurs speak and write in English and have a high level of education. They can be informal, straightforward, open-minded, and experienced in traveling internationally. During a first introduction, many may talk about their last visit to the United States, or about another occasion that they spent time in the USA. The Dutch also engage in small talk that enables them to get to know the other person in an informal way. They tend to communicate on a ‘first name’ basis. It is widely accepted to communicate via email and increasingly via WhatsApp. The Dutch expect to receive a response quickly, or at least within 24 hours.

The Dutch are business-minded and like to be well informed about the company they are about to do business with the product in question, price, and future business opportunities. They can be quick discussion makers. Doing business does not require ‘wining & dining.’ The Dutch preferably want to get the job done during regular business hours since a healthy ‘work-life’ balance is important to them.

Food retailers, foodservice companies, and wholesalers normally do not buy directly from suppliers from third (non-EU) markets, such as the United States. Instead, they work with dedicated and highly specialized local traders. These traders have in most cases a lot of experience in doing business with overseas producers, are informed about what documents need to accompany the goods from the United States, and know which products or ingredients are not approved to import into the EU. They look for long-term partnerships rather than a one-off business transaction.

General Consumer Tastes and Trends

General consumer trends that affect the Dutch food retail and foodservice market can be found in the reports [the Dutch Food Retail Market – June 28, 2023](#) and [the Dutch Foodservice Market – September 22, 2023](#).

Market Research

Other exporter assistance and market research reports can be downloaded from the following website: <https://gain.fas.usda.gov/#/search>.

Trade Shows

Please find below an overview of the trade shows that annually take place in the Netherlands.

Table 2. Trade Shows in the Netherlands

Name:	Target Audience:	Dates:	Website:
Horecava	Foodservice HRI industry buyers	January 8-11, 2024	http://horecava.nl/
PLMA (Private Labeling Manufacturing Association)	International buyers of private label products	May 28-29, 2024	https://www.plmainternational.com/
BBB & Folie Culinaire	Local high-end gastronomy	October 7-9, 2024	https://www.bbbmaastricht.nl/folie-culinaire/
WBWE (World Bulk Wine Expo)	International buyers of (private label) bulk wine	November, 2024	https://www.worldbulkwine.com/en/
FFFFE (Free From Functional Food Expo)	Buyers of innovative products with a free from, vegan, and organic claim	November 5-6, 2023	https://amsterdam.freefromfoodexpo.com/

Source: FAS/The Hague

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

Information about customs clearance, required documentation for imported products, labeling requirements, tariff information and FTAs, and trademarks and patent market research can be found in the Food and Agricultural Import Regulations and Standards (FAIRS) Country and Certificate Reports which can be downloaded from the following website: <https://gain.fas.usda.gov/#/search>.

Most Dutch food legislation is harmonized at the EU level. Where EU regulatory harmonization is not yet complete or absent, imported products must meet existing Dutch requirements. U.S. exporters should be aware that national measures still exist for the choice of language, use of stickers, samples, special use foods, vegetarian and vegan products, packaging waste management, food contact materials, enzymes, processing aids, product registration, novel foods, fortified foods, food supplements, and irradiated foodstuffs.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Key Developments in the Food Industry

Demand for Sustainable Food Products Is Still Up

Total consumer spending on foods certified as sustainable grew by an impressive 13 percent in 2022 to €10.8 billion (an estimated \$10 billion). The share of sustainable food compared to total spending on food is estimated at 18 percent in 2022. Sustainable food continues to be the most important growth market in the Dutch food industry and consumption of these products is expected to continue to increase albeit at a slower pace. This is mainly because the overall costs of living, including food prices, continue to increase. A wider range of certified products and changing consumer preferences (paying

more attention to sustainability and health) explained the growth in spending on these products. More information can be found in [Monitor Duurzaam Voedsel 2022](#) (in Dutch).

Growing Interest in Authenticity

In addition to sustainability, consumers, and in particular Millennials and Generation Z, seem to be willing to pay for authenticity. They are interested in hearing or reading about who produced a food product and what the story behind the product is. This desire for authenticity also applies to foodservice outlets. Hosts that have a story to tell about their restaurant, cafe, or bar appeal to today’s consumers.

Growing Awareness of Health and Well-Being and Demand for Nutritious Food

Consumers seem to increasingly be rushed and are struggling to do many things on a regular day. Moreover, they are facing a dilemma: less time for buying food and preparing meals versus a growing awareness of and interest in health and nutrition. The demand for convenient healthy and nutritious food products (albeit at an affordable price) is growing more than ever before. Overall, consumers are more interested in food and beverages. Beyond traditional media outlets, influencers are rapidly gaining power. Consumers seem to trust what an influencer has to say about a product while retailers play a crucial role as well, as they market food products to create, anticipate, and meet consumer needs.

Price is gaining Importance

The [Consumers’ Association](#) reports that during the last few months of 2022 and the first of 2023, prices of some basic shopping items, including rice, coffee, milk, butter, and potatoes, increased by 15 percent compared to those year ago. Although it is expected that this increase will level off in the second half of 2023, consumers are visiting multiple supermarkets in their search for the lowest price. Consumers are also choosing more often private label products instead of A-brands and are exchanging products between categories. For meat as an example, this means less meat (such as smaller portions), cheaper variants (such as minced meat or chicken or less organic meat), or more vegetables instead of meat. The number of people going to food banks has also grown by 15 percent in 2023. While sustainability, authenticity, health, and nutrition are important purchasing factors for many Dutch consumers, price has become the most important factor.

The following sectors offer opportunities for new sales: tree nuts, pulses, food products with a special certification (organic, sustainable, free-from claim, etc.), healthy and nutritious food snacks, and innovative alcoholic and non-alcoholic beverages.

Table 3. Best Consumer-Oriented Product Prospects

Commodity (HS code)	Imports, million USD, 2022	Imports from U.S., million USD, 2022 (U.S. market share)	Estimated average annual import growth
Bread, pastry, cakes (HS190590)	1,244	32 (3 %)	16%
Wine (HS220421)	1,337	26 (2 %)	9%
Coffee extracts (HS210111)	220	32 (15 %)	74%
Sugar confectionary (HS170490)	458	16 (3 %)	10%
Hake (HS030474)	41	4 (9 %)	143%
Peas (HS071310)	44	3 (7 %)	167%
Vodka (HS220860)	75	3 (4 %)	9%

Source: www.tradedatamonitor.com

Links to access retailer-specific information and expected growth rates of each sector, as well as a qualitative assessment of the market opportunities for consumer-oriented products in the food retail, foodservice, and food processing sectors, can be found in the reports [the Dutch Food Processing Ingredients Market – April 4, 2023](#), [the Dutch Food Retail Market – June 28, 2023](#) and [the Dutch Foodservice Market – September 22, 2023](#).

Competitive Situation for Selected U.S. Consumer-Oriented Products

Table 4. Netherlands' Imports of Consumer Oriented Products, 2022 figures

Product Category (Product Code) Imports in Millions of USD	Main Suppliers, By Percentage		Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Craft beer (HS2203) Total imports: \$533 From USA: \$4	1. Belgium 2. Germany 3. Poland 4. The U.K. 9. USA	59 13 5 4 1	Competition from neighboring countries, dominated by Belgium and Germany.	Strong demand for cans, new flavors, funky labels, and innovative tastes.
Sweetpotatoes (HS071420) Total imports: \$157 From USA: \$59	1. USA 2. Egypt 3. Belgium 4. Germany	37 25 8 5	Competition from Egypt, China, and Honduras.	The availability of fresh and processed sweetpotato products continues to grow. Strong demand for variety and quality.
Wine (HS2204) Total Imports: \$1,586 From USA: \$27	1. France 2. Italy 3. Germany 4. Spain 5. Chile 11. USA	30 16 14 10 6 1	France, Italy, Germany, and Spain have well known, good quality wines at competitive prices and are popular holiday destinations.	Limited commercial availability of domestic wines in the Netherlands.
Distilled spirits (Product group) Total imports: \$1,414 From USA: \$129	1. The U.K. 2. Belgium 3. Germany 4. USA	21 17 17 9	Competition from good quality products produced in neighboring countries, dominated by Belgium and Germany.	Strong demand for whiskies with funky labels, innovative tastes and that have a story to tell.

Seafood products (Product group) Total imports: \$5,515 From USA: \$118	1. Iceland 2. Norway 3. Germany 4. Belgium 5. Denmark 14. USA	14 8 7 7 6 2	Iceland and Norway are the leading supplier of cod and salmon, respectively while Germany dominates Dutch imports of pelagic fish. The USA dominates the supply of Alaska Pollack, scallops, and wild salmon. For shrimp & prawns, cod, and lobster, the USA competes with other non-EU exporters.	The Netherlands is an international trader in and processor of seafood products, serving foodservice markets and retail throughout Europe. The Dutch increasingly depend on imports for Alaska Pollack, scallops, wild salmon, shrimp & prawns, cod, and lobster.
Beef and beef products (Product group) Total imports: \$2,662 From USA: \$183	1. Germany 2. Belgium 3. Ireland 4. Argentina 8. USA	15 10 10 8 7	Germany and Belgium sell lower quality and price competitive beef. The USA exports high quality and grain fed beef, known for its consistency and taste, to the high-end foodservice industry and retail outlets.	There is not enough Dutch beef of high quality available. Ireland, Argentina, Uruguay, Brazil, and the USA all profit from this deficit.
Condiments and sauces (Product group) Total imports: \$678 From USA: \$18	1. Germany 2. Belgium 3. Thailand 4. Poland 11. USA	17 14 8 8 3	Germany, Belgium, and Poland benefit from proximity and being in the EU market.	Demand for unique and good quality products.
Walnuts (HS080231) Total imports: \$14 From USA: \$5	1. USA 2. Chile 3. France 4. Germany	36 33 13 13	Competition from Chile and France.	Growing demand from the snack industry. Walnuts benefit from their healthy reputation.
Food Preparations (HS210690) Total Imports:	1. Germany 2. USA 3. Belgium	17 14 14	Due to proximity, neighboring countries are the	Food preparations are produced and used throughout the EU.

\$2,100 From USA: \$294	4. U.K. 5. France	8 6	leading suppliers of flavored or colored sugar, isoglucose, lactose, and glucose and maltodextrine syrups.	
Odoriferous Substances (HS330210) Total Imports: \$585 From USA: \$105	1. Ireland 2. Germany 3. USA 4. The U.K.	40 18 18 7	Odoriferous Substances are compounds (natural and synthetic) with odors used in the manufacture of various non-food and food products and are locally available.	U.S. suppliers are often at a price disadvantage compared to EU suppliers mainly due to time, shipping costs, and taxes.
Peptones and Derivatives (HS350400) Total Imports: \$550 From USA: \$99	1. USA 2. Germany 3. Belgium 4. France	18 17 15 11	Peptones are used by producers of food supplements and are locally available.	U.S. suppliers are often at a price disadvantage compared to EU suppliers, mainly due to time, shipping costs, and taxes.
Snack food (Product group) Total imports: \$2,204 From USA: \$46	1. Germany 2. Belgium 3. France 4. U.K. 10. USA	27 26 8 5 2	1, 2, and 3 are close to the market and offer good quality products.	Demand for branded, good quality, and unique products that have a story to tell.
Chewing Gum & Candy (Product group) Total imports: \$489 From USA: \$16	1. Belgium 2. Germany 3. Spain 4. Poland 8. USA	26 22 6 6 3	1, 2, 3, and 4 are close to the market and offer good quality products.	Driven by social media there is local demand for extra sour and extra spicy candy and the United States is popular.
Sugar Confectionary (HS170490) Total Imports: \$458 From USA: \$16	1. Belgium 2. Germany 3. Spain 4. Italy 8. USA	26 23 6 6 3	1, 2, 3, and 4 are close to the market and offer good quality products. U.S. confectionary is known for its unique flavors, strong brands, and fun packaging. Moreover, they are popular on social media	Driven by social media there is local demand for extra sour and extra spicy candy and the United States is popular.

Bakery Goods (Product group)	1. Belgium	25	Competition from neighboring countries	Growing demand for pastry containing chocolate or confectionary
Total imports: \$2,978	2. Germany	24		
From USA: 44	3. France	7		
	4. Italy	7		
	5. U.K.	5		
	12. USA	1		

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SECTION V. AGRICULTURAL AND FOOD IMPORTS

Agricultural & Food Import Statistics

Dutch imports of U.S. agricultural and food products can be downloaded from the following website <https://apps.fas.usda.gov/gats/BicoReport.aspx?type=country>. Please make the following selection: Product Type: exports; Market Year: calendar year; Report Type: year-to-date; Country: Netherlands; Product: agricultural & related products and Download: word.

Table 4 in this report provides an overview of the best high value consumer-oriented products prospects.

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

If you are a U.S. interested party and have questions or comments regarding this report, need assistance exporting to the Netherlands, a list of Dutch wholesalers and distributors, or you are looking for the Foreign Buyers Lists (FBL) of various consumer-oriented products and seafood products, please contact the Foreign Agricultural Service in The Hague, the Netherlands:

U.S. Department of Agriculture’s Foreign Agricultural Service (FAS)

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This FAS office also covers the countries in the Nordic markets and has Exporter Guides for the following countries: Denmark, Finland, Iceland, Norway, and Sweden. These Exporter Guides can be found on their respective country pages on the following website: <https://gain.fas.usda.gov/#/search>. Additional information about promotional events taking place in Europe, U.S. trade associations active in this market, delicious recipes with U.S. ingredients, articles highlighting U.S. food and agricultural products, and other information can be found on **Error! Hyperlink reference not valid..**

Attachments:

No Attachments