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Netherlands

Food Processing Ingredients

The Dutch Food Processing Ingredients Report

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Report Highlights:

The Dutch food processing sector generated a turnover of USD 82.5 billion last year and demonstrated the highest production growth in five years, supported by growing demand from mainly Germany, Belgium, France and the United Kingdom. Growing exports are also the main driver behind Dutch imports. Dutch food companies have been working closely together to ensure their products are safe and competitive and more recently that they are also healthy, nutritious and sustainable in order to meet consumer demand. Despite fierce competition from suppliers in other European Union member states and other countries, Dutch food companies are always on the lookout for food ingredients from the United States that might give them a competitive advantage.

SECTION I. MARKET SUMMARY

The Dutch Food Industry in Bitesize

There are 5,890 food companies in the Netherlands, ranging from large multinationals to small & medium sized companies. Last year the total number of food companies increased by over three percent. Striking is the growth of small businesses (employing less than 10 employees), a trend that has been around for five years. The food industry employs approximately 136,000 people, or six percent of total employment in the Netherlands.

The Dutch food industry is going well. According to the Dutch Food Industry Federation (FNLI) the sector generated a turnover of \$82.5¹ billion last year and accounts for almost five percent of Dutch GDP. The subsectors of meat, dairy and fresh produce each account for roughly a quarter of the industry's turnover. With an increase of five percent, the food industry demonstrated the highest production growth in five years.

The industry's exports grew last year by 12.1 percent and were valued at \$46.8 billion. In the same year imports totaled \$22.8 billion, nine percent higher than the previous year. As a result, the industry's trade surplus grew by 15 percent to \$24 billion.

About 80 percent of Dutch exports go to other European Union (EU) member states, especially to neighboring countries. Although there continue to be growth opportunities in Europe, discovering and developing markets outside the EU is fundamental for the future of the Dutch food industry.

The World's Second Largest Trader of Agricultural 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 1. 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 U.S. exports to the EU.

¹ 1\$=0.85€

This report's focus is on food ingredients 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 2. Dutch Imports of Consumer Products, 2016			Table 3. Dutch Imports of Fishery Products, 2016		
Partner Country	USD	%	Partner Country	USD	%
Germany	5,280,297,790	17	Iceland	414,125,730	13
Belgium	4,185,439,773	14	Germany	295,696,145	9
Brazil	1,706,349,006	6	Russia	245,462,630	7
France	1,669,356,377	5	Norway	207,437,352	6
Spain	1,507,670,827	5	Belgium	186,533,340	6
United States	1,228,985,057	4	Vietnam	167,961,179	5
United Kingdom	1,066,929,433	3	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, high-value ingredients used in the Dutch food industry. 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 4. Dutch Imports of Intermediate Products, 2016			Table 5. Dutch Imports of Bulk Products, 2016		
Partner Country	USD	%	Partner Country	USD	%
Germany	2,639,366,313	20	United States	984,616,138	10
Belgium	1,277,304,389	10	Brazil	981,657,451	10
Indonesia	993,021,537	8	Cote d Ivoire	965,672,786	10
Brazil	980,686,839	8	France	665,759,599	7
France	761,555,886	6	Germany	647,487,632	7
Malaysia	653,093,999	5	Belgium	562,639,917	6
United States	566,818,116	4	Ghana	545,019,981	6
Argentina	504,323,948	4	Nigeria	383,872,329	4
Philippines	393,249,543	3	Argentina	357,185,943	4
Cote d Ivoire	354,764,137	3	Cameroon	356,179,952	4
Other	3,944,044,391	30	Other	3,194,228,479	33
World	13,068,229,098	100	World	9,644,320,207	100

Source: World Trade Atlas

The Key Market Drivers for Food Processing

I. Food safety and Regulations

Food Safety - Producing safe food stuffs is a basic condition for the Dutch food industry. Products can only be marketed when they meet strict requirements. The food industry itself is responsible for the food safety of the products. Food companies must comply with the requirements as laid down in European regulations and the Dutch Food Law. The Dutch Food and Consumer Product Safety Authority (NVWA) checks to ensure companies have a food safety plan in place and they are complying with the requirements.

Confidence and Product Integrity – The Dutch question the food chain whenever there is a food scandal. For instance when a product is sold containing excess levels of insecticides that are not permitted in the sector, such as was the case when Fipronil was found in eggs or when a product is sold as a completely different product, such as when horsemeat was sold as beef. In order to regain consumers' trust also to eliminate fraud, the sector takes measures to ensure that products are also what they claim to be. The government, the NVWA and the FNLI all work together in the Food Safety Taskforce to ensure product integrity.

Labeling – The new European labeling rules (Regulation 1169/2011) that Dutch food manufacturers must adhere to require food companies to provide consumers with unambiguous, factual, understandable and objective information on the product label.

More information about European and Dutch import regulation, standards and required certificates can be found in the [GAIN NL7005 – Food and Agricultural Import Regulations and Standards Report, February 9, 2017](#).

II. Health

The impact of food on health is an important issue as according to the Dutch Central Bureau of Statistics 53 percent of men and 44 percent of women are overweight. For children and adolescents up to 20 years, this number is 12 percent. Overweight and obesity are major and complex social problems. Food manufacturers are experiencing pressure from society to invest in facilitating healthier choices for consumers. The challenge is to combine healthier nutrition with other consumer needs such as affordability, convenience and taste.

Improved Product Composition - Through innovation and changed product composition, food companies are working on the nutritional impact of food products. They work together with food retailers and foodservice companies in reducing the salt content, saturated fats, and portion sizes to make it easier for consumers to adhere to a responsible diet. On the product label, consumers can find information on the composition of the product, presence of allergens, quantity of the product, shelf life and storage conditions.

III. Competitiveness

Having access to capital, qualified labor, efficient laws and regulations and a good infrastructure are essential for food companies to continue to manufacture food products in the Netherlands. It is important that employees remain competent, productive, motivated and healthy.

The Dutch food industry has voiced concerns that legislation and regulations should not slow down innovation but rather stimulate it in terms of sustainability, nutrition and health. The industry argues that discussions about novel foods, genetic modification and nanotechnology should be conducted on scientifically and factual basis, rather than with emotional arguments.

IV. Sustainability

More and more Dutch food companies are moving towards sustainable business models. They are looking at what can be done better in their factories like reducing energy and saving water. Increasingly they are also spending resources on having a more responsible purchasing policy in place for their raw inputs. As a result, many have switched to more sustainable alternatives for palm oil, soya, meat, fish, coffee or cocoa. In order to ensure sustainability, food companies are working together with partners at different stages in the supply chain.

Food waste has gained more attention over the past few years. Food waste can be caused by production failures, planning errors or disapproval of finished products due to a too-short shelf life. Food companies try to minimize food waste not only from a business point of view but increasingly from an ethical and sustainability point of view. Food companies along with other partners in the foodservice and food retail industry are part of the [Taskforce Food Waste](#) in order to minimize food waste in the Netherlands.

Table 6. Advantages and Challenges

Advantages - sector strengths and opportunities	Challenges - sector weaknesses and threats
U.S. ingredients have a good reputation and image.	Several products cannot be exported to the EU since they are not EU-approved (poultry, GMO derived ingredients, shell fish, etc.).
Food processing companies are on the lookout for new ingredients, ranging from low-value and unprocessed commodities to high-value and highly processed ingredients in order to create new products.	U.S. exporters face competition from other EU member states and third countries such as Canada that have negotiated lower tariff rates through trade agreements.
Growing consumer demand for healthy and sustainable food products has sparked a growing demand for food ingredients that contribute to a healthier lifestyle and certified sustainable food ingredients.	Sustainability standards are increasingly becoming a requirement of the food industry and can act as a barrier to trade.
The food processing industry is growing and needs more imported food ingredients. The U.S. offers a broad range of food ingredients	

and is capable of satisfying demand of the well-developed Dutch food processing industry.
The Netherlands is centrally located and often offers better logistical access to neighboring countries.
Within a within 500 kilometers the Dutch have access to 170 million affluent consumers or one third of the total EU population.

Source: FAS The Hague

SECTION II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

The first step for U.S. companies that would like to start exporting food ingredients to the Netherlands is to determine whether there is a potential market for their product. It is important to gain a good understanding of who the clients and end-users could be. If there is a market, trade statistics can help to indicate whether the Dutch need to import this ingredient or whether it is locally or regionally available. If it needs to be imported, statistics will show the amount being imported, from which competing supplying country the ingredient is coming, and whether imports have recently gone up or down. Section IV below is a good place to start.

If there is a market for the ingredient, it helps to understand the supply chain and the role of the various players. Not wanting to deal with price volatility and documentation and other import requirements are the main reasons food processors prefer to buy food ingredients from specialized traders rather than sourcing directly. Only large or highly specialized food processors might opt to import ingredients directly from foreign suppliers. Dutch companies prefer to do business with small & mid-size companies rather than with larger corporations. Similar to the commodity groups in the United States, most sectors in the Netherlands also have their own traders or producers groups. Most of these groups have annual reports available on their website which will help to better understand the challenges the industry is facing. FAS The Hague has contact with these Dutch industry groups and can provide you a Foreign Buyers List (FBL) for a specific sector.

Food ingredients from the United States in general have a good quality image. However, after import duties and taxes the ingredient may no longer be price competitive. Shipping costs and time might be disadvantages for U.S. exporters compared to other competitors within the region. In addition to looking into competition, it is highly recommended to study the Dutch import requirements. FAS The Hague annually drafts the [GAIN NL7005 – Food and Agricultural Import Regulations and Standards Report, February 9, 2017](#) which provides an overview of import regulation standards and required certificates.

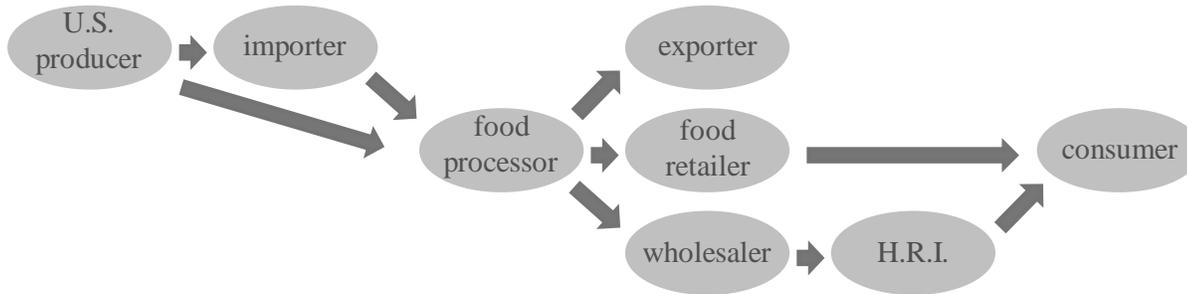
Once the U.S. exporter has this background information, there are several options on how to enter the Dutch market. They may consider exhibiting at a specialized food ingredient trade show in the United States. Dutch buyers regularly travel to the United States to see new products and make new contacts. Exporters should also consider visiting or even exhibiting at European trade show, some of which are USDA Endorsed. Trade shows can serve as a springboard into the market, helping companies to establish new trade contacts and gauge product interests. Dutch buyers visit these shows and often have an exhibitor booth as well. FAS The Hague compiles a complete list of trade shows frequently visited by Dutch buyers of food ingredients. This list can be found in Section V of [GAIN NL7026 – Exporter Guide September 20, 2017](#).

U.S. exporters can also contact their respective U.S. State Regional Trade Groups (SRTG), their commodity Cooperator Group and/or their State Department of Agriculture to obtain additional market entry support. The cooperators regularly organize Trade and Reverse Trade Missions which are often arranged around trade shows or other events. These missions have proven to be an excellent platform for U.S. suppliers of food ingredients to meet and do business with foreign buyers.

B. MARKET STRUCTURE

The Dutch food processing industry is mature, well organized and has access to any food ingredient imaginable. In order to be successful on the Dutch market, U.S. food ingredients must have a competitive advantage, for instance on price, quality, volume, variety, size, (seasonal) availability, packaging, special certification (organic, sustainable), etc.

Figure 1: Distribution Channel Flow Diagram



Depending on the type of food ingredient, the supply chain might differ. The above supply chain applies to the majority of food ingredients. Food processors in the Netherlands source their ingredients from local producers or from specialized traders when the ingredients are locally not (sufficiently) available or not competitive. Finished food products are subsequently sold to Dutch food retailers, foodservice companies or in some cases exporters.

C. COMPANY PROFILES

Below table presents an overview of some of the largest Dutch food companies.

Table 7: An Overview of the Largest Dutch Food Companies, 2016 Figures

	Company Name	Website	Total Turnover, \$ Million	Product Group	End-Use Channels
1	Unilever	Unilever.com	62,012	Specialty Foods	retail and foodservice
2	Heineken	Heineken.com	24,461	Beer	retail and foodservice
3	FrieslandCampina*	Frieslandcampina.com	13,059	Dairy	retail and foodservice
4	DSM	Dsm.com	9,318	Specialized Food Ingredients	food processing
5	VION Food Group	Vionfoodgroup.com	5,587	Meat	food processing, retail and foodservice
6	Greenyard Foods*	Greenyard.group	4,667	Fruit and Vegetables	retail and foodservice
7	Hoogwegt**	Hoogwegt.com	4,118	Dairy	food processing
8	Refresco Group	Refresco.com	2,744	Nonalcoholic Beverages	retail and foodservice
9	Van Drie Group**	Vandriegrup.com	2,400	Veal	retail and foodservice
10	Cosun	Cosun.com	2,339	Ingredients	food processing
11	Plukon	Plukonfoodgroup.com	1,507	Meat	retail and foodservice
12	A-ware Food Group	Royal-aware.com	1,412	Dairy	food processing
13	The Greenery	Thegreenery.com	1,212	Fresh Produce	retail and

					foodservice
14	Corbion	Corbion.com	1,072	Specialized Food Ingredients	food processing
15	Vreugdenhil Dairy Foods	Vreugdenhildairyfoods.nl	694	Dairy	retail and foodservice
16	Wessanen	Wessanen.com	671	Healthy Food	retail and foodservice
17	DOC Kaas**	Dockaas.nl	656	Dairy	retail and foodservice
18	Borgesius Bakkersland	Borgesius.nl	565	Bakery	retail and foodservice
19	Zwanenberg Food Group	Zwanenberg.nl	494	Meat	retail and foodservice
20	Van Rooi Meat	Vanrooimeat.nl	60	Meat	retail and foodservice

Source: FAS The Hague, industry experts, company websites

*2015 figures

**2014 figures

D. SECTOR TRENDS

Consumer Trends

There are three main demographic developments in the Netherlands: 1. the graying of the Dutch population, 2. more ethnic diversity and 3. a drop in the size of the average household. These developments are described in more detail in [GAIN NL7026 – Exporter Guide September 20, 2017](#).

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 Dutch are increasingly looking for food stuffs that improve their health and well-being. This trend is driving sales of fresh & raw foods and sugar-free & gluten free products. Consumers also demand highly processed functional foods and nutritional supplements that complement their daily diet.

Sector Trends

Below GAIN reports describe the foodservice and food retail industry in the Netherlands and the latest trends and developments per sector.

- The [GAIN NL6014 – The Dutch Foodservice Report, July 6, 2016](#) provides an overview of the food service industry and its various sectors within the Netherlands. It provides an understanding of the key channels of distribution for foods and beverages destined for food service.
- The [GAIN NL6037 – The Dutch Food Retail Report, December 14, 2016](#) gives an overview of the food retail market within the Netherlands, the major players and the entry strategy for U.S. exporters.

A complete selection of FAS reports can be viewed online at:

<http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx>

Below table provides an overview of U.S. food companies that are present in the Netherlands and the product groups they are active in.

Table 8: U.S. Food Companies in the Dutch Market

U.S. Companies	Product Groups
ADM	oilseeds, oils, fats, cocoa
Bruce Foods	tex-mex food products
Campbell Foods	soup
Cargill	grains, oilseeds, oils, fats, starch, poultry, sugar, cocoa, feed
Kraft Heinz	salad, convenience, coffee and confectionary products
Lamb Weston	potato
Master foods	confectionary products
PepsiCo	beverages, snacks, fats nuts, chips
Procter & Gamble	confectionery
Simplot	potato

Source: FAS The Hague

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 9: Overall Competitive Situation for Selected Food Ingredients in the Netherlands, 2016

Product Category	Leading Countries of Origins [+ USA], in Percentage	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers
Food Preparations (HS210690)	[USA: 18%] Germany: 18% UK: 12%	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 specialized food preparations	Food preparations are produced throughout the EU.
Total Imports:			
\$1,059 million			

Animal or Vegetable Fats, Oils & Their Fractions (HS151800) Total Imports: \$614 million	Germany: 18% [USA: 13%] Indonesia: 9% UK: 8% Belgium: 7%	EU demand for oils and fats is growing due to biofuels production.	EU availability of animal fats and production of rapeseed and sunflower seed is limited.
Peanuts (HS120242) Total Imports: \$426 million	Argentina: 67% [USA: 10%] China: 7% Brazil: 5%	Argentina continues to dominate the market and supplies good quality peanuts.	No local supply.
Odoriferous Substances (HS330210) Total Imports: \$326 million	Ireland: 34% [USA: 19%] Germany: 19% France: 14%	Odoriferous Substances are compounds (natural and synthetic) with odors used in the manufacture of various non-food and food products and are locally available.	EU suppliers don't have to pay import taxes and are closer to the market.
Sunflower Seeds (HS120600) Total Imports: \$318 million	Romania: 22% Bulgaria: 19% Hungary: 12% [USA: 11%] Russia: 7% France: 7%	Third country supply is price competitive at Northwest EU ports.	EU production of sunflower seed is limited.
Almonds (HS080212) Total Imports: \$189 million	[USA: 74%] Spain: 12% Australia: 7%	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.
Cod (HS030363) Total Imports: \$185 million	Russia: 49% Norway: 37% [USA: 6%]	All suppliers offer good quality cod.	No or not enough local availability. Strong demand for producing breaded deep fried white fish products.
Peptones and Derivatives (HS350400) Total Imports: \$170 million	[USA: 34%] Belgium: 20% France: 15%	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.

	Germany: 8%		
Pistachios (HS080251)	[USA: 82%] Iran: 12%	The U.S. dominates the international pistachios trade.	According to industry sources Iran has experienced problems with aflatoxin in the past.
Total Imports: \$93 million			

Cranberries (HS200893)	[USA: 59%] Chile: 17% Canada: 16%	Main supplying countries of cranberries are the U.S., Chile and Canada. The market share of the first is 70 percent but declining at the expense of Chile.	No local availability. 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.
Total Imports: \$76 million			
Alaska Pollock Fillets (HS030475)	[USA: 65%] China: 23%	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.
Total Imports: \$70 million			

Source: Globe Trade Atlas

SECTION IV. BEST PRODUCT PROSPECTS

This section identifies the best product prospects for the food ingredients market. Table Category A provides a more detailed overview of the products that are currently in the Netherlands and have good sales potential. The tariff rates for these product including changes in market access or import regulations and standards can be found in the [GAIN NL7005 – Food and Agricultural Import Regulations and Standards Report, February 9, 2017](#).

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, asparagus and mangoes)

Food Ingredients Not Present in Significant Quantities, But Which Have Good Sales Potential

- Ingredients for natural and healthy food stuffs
- Bakery products
- Dairy products (whey, milk powder)
- Specialty grains (millet, spelt and meslin)
- Pulses

Food Ingredients Not Present Because They Face Significant Barriers

- Poultry
- GMO derived ingredients that are not EU approved
- Shell fish

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

Commodity / HS code	Imports, 2016, million USD	Imports from the U.S., 2016, million USD (U.S. market share)	2012 – 2016 average annual import growth	Key constraints over market development	Market attractiveness for U.S. suppliers
Tomato Paste (HS200290)	107	28 (27%)	0-5%	Competition from Italy, Spain and Portugal.	Strong demand from the food manufacturers.
Dried Prunes (HS081320)	17	7 (46%)	0-5%	A dried prune is a more expensive snack than sweets or a savory snack. U.S. dried prunes face competition from Argentina and Chile.	Dried prunes benefit from a healthy image. They are also a healthy snack replacement for sweets. Growing demand from food manufacturers and snack industry.
Chickpeas (HS071320)	6	0.2 (4%)	0-5%	The older and more traditional consumer is unfamiliar with humus or when to use chickpeas.	The younger and more traveled consumers simply love humus and use chickpeas in soups, salads, and meals.
Food Preparations (HS210690)	1,059	186 (18%)	0-5%	Competition from producers based in the EU.	Food companies are looking for unique, new and innovative food preparations.
Orange Juice (HS200919)	502	35 (7%)	100-150%	Brazil dominates the Dutch market. There is additional competition from South Africa and Argentina.	Growing demand for natural flavors and as an ingredient in smoothies.
Edible Fats & Oils (HS151790)	214	98 (46%)	0-5%	The United States dominates the Dutch market. There is competition from Belgium, Germany and Switzerland.	Food companies are looking for unique, new and innovative edible fats & oils products.
Mixtures Odoriferous substances (HS330210)	326	61 (19%)	0-5%	Competition from Ireland, Germany, France, the U.K. and Belgium.	Food companies are looking for flavoring powders, syrups and concentrates.
Peptones & Derivatives (HS350400)	170	57 (34%)	0-5%	Competition from Belgium, France, Germany, New Zealand, Hungary and China.	Food companies are looking for savory flavors.

Source: Globe Trade Atlas

SECTION V. POST CONTACT AND FURTHER INFORMATION

If you have questions or comments regarding this report, or need assistance exporting to the Netherlands, please contact our office:

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