Required Report: Required - Public Distribution

Date: April 02, 2026

Report Number: NL2026-0006

Report Name: Food Processing Ingredients Annual

Country: Netherlands

Post: The Hague

Report Category: Food Processing Ingredients

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Report Highlights:

The Dutch food processing industry maintained a turnover of $129 billion in 2024, with 62 percent of production sold internationally – 35 percent of which goes to Germany, France, and Belgium. The total number of companies in the food industry was 9,045 and together they provide 162,000 jobs. Despite geopolitical tensions, trade shifts, and high costs for raw materials, energy, and labor, the sector remains a stable pillar of the economy. The Dutch grocery basket continues to be relatively affordable compared to other nearby European countries.

Market Fact Sheet: The Netherlands

Executive Summary:

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

Consumer-Oriented Agricultural Imports

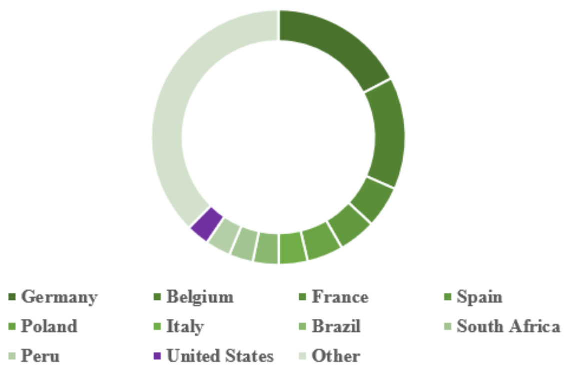


Chart 1: Top Exporting Countries to the Netherlands

Food Retail Industry

The Dutch retail sector is rather consolidated, employing over 300,000 people, and operating in 6,130 stores. The sector's turnover for 2025 was estimated at €51.1 billion ($58 billion) – 80 percent being sales of food products. Consumers are looking for products on sale, while sales of private labeled products remain strong. Cheaper, further processed variants and discount stores are gaining popularity. Interest in on-line shopping continues to grow.

Food Processing Industry

Over 9,045 food companies in the Netherlands generated net sales of €114 billion ($129 billion) in 2024. The industry is a steady supplier of jobs in the Netherlands (162,000). The Dutch food industry is an internationally operating sector with 62% of its products sold internationally, focusing on the German, French, and Belgian consumer market.

Foodservice – HRI Industry

In 2025, the industry's turnover was up by four percent and valued at €16.4 billion ($18.5 billion), as consumer spending power improved and warm spring and summer weather boosted sales. At the same time, due to low profit margins, many restaurants, bars and cafés were forced to close their doors. Businesses that respond well to changing market conditions, adapt easily, or develop innovative new concepts still thrive.

Quick Facts CY 2025

Imports of Consumer-Oriented Products

$68.7 billion

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

1. Cocoa beans	6. Meat
2. Food preparations	7. Grapes
3. Fats and oils	8. Cocoa butter
4. Avocados	9. Cheese
5. Baked products	10. Coffee

Food Industry by Channels 2025, in $ billion:

Retail Food Industry	$58
Food Service-HRI	$19
Food Processing	$129
Food and Agriculture Exports	$177

Top 10 Food Retailers in the Netherlands, Market Share:

1. Albert Heijn	38.2%	6. Dirk/Deka	5.1%
2. Jumbo	19.9%	7. Hoogvliet	1.9%
3. Lidl	10.7%	8. Spar	1.7%
4. Plus/Coop	8.4%	9. Jan Linders	1.1%
5. Aldi	5.9%	10. Poiesz	1.1%

GDP/Population:

Population: 18.0 million

GDP: $1,298 billion (€1,150 billion)

GDP per capita: $71,670 (€63,500)

Strengths/Weaknesses/Opportunities/Challenges

Strengths:	Weaknesses:
The Netherlands is a gateway to the EU for U.S. ingredients and the home to specialized traders and food processing companies. There is a long tradition of processing food ingredients.	Transatlantic transportation is costly and takes time. U.S. products are subject to import tariffs and non-tariff trade barriers.
Opportunities:	**Threats:**
Dutch traders and food processors have a good track record working with U.S. suppliers. There is a strong demand for a wide variety of food ingredients.	There is fierce competition on price, quality, uniqueness, and innovation from other EU member states and from third countries that have negotiated lower tariff rates.

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

Contact: FAS The Hague, agthehague@usda.gov

SECTION I. MARKET OVERVIEW

Although the Netherlands is a small country geographically, it is the gateway for U.S. ingredients into the European Union (EU) due to the presence of the Ports of Rotterdam and Amsterdam, Amsterdam Schiphol Airport, the confluence of two major European rivers, and an excellent road and railway infrastructure. It is the largest importing country within the EU and continues to be the second largest exporter of agricultural products in the world, after the United States. These exports ($177 billion in 2025) include products produced in the Netherlands as well as imported products that are re-exported, often after further processing and adding value.

Overall Business Climate

The CPB Netherlands Bureau for Economic Policy Analysis published its latest projections on March 12 in the Central Economic Plan 2026 (CEP). The Dutch economy continues to grow steadily for the time being, but international uncertainty remains high. Purchasing power is expected to rise in 2026 but remain broadly unchanged overall in 2027 as real wage growth is offset by increased costs. At the same time, public finances are set to deteriorate due to higher expenditure on defense, healthcare and social security, among other things. This is according to the latest projections by CPB Netherlands Bureau for Economic Policy Analysis, https://www.cpb.nl/en/forecast/central-economic-plan-cep-2026.

Market Dynamics and Underlying Causes

In its https://fnli.nl/publicaties/monitor-levensmiddelenindustrie-2025, the Federation of the Dutch Grocery and Food Industry (FNLI) presents the economic key figures for the year 2024 (and partly 2025). The turnover of the Dutch food processing industry for 2024 (most recent data available) remained at $129 billion (€114 billion[1]).

The Dutch food industry is an internationally operating sector. The majority (62 percent in 2024) of what the sector produces is sold internationally, of which 35 percent alone ended up on the German, French, and Belgian consumer market. Conversely, the Dutch shopping basket is largely dependent on imported food ingredients including fresh produce, grains, meat, coffee, tea, cocoa, and spices. In the same year, the export value of the food industry was valued at $80.1 billion (€71 billion), an increase of 27 percent compared to the previous year. The import value of the food industry increased by 2.8 percent to $52.3 billion (€46.3 billion). The export balance, the difference between exports and imports amounted to $27.9 billion (€24.7 billion), similar to 2023.

Because the number of micro-enterprises (< 10 employees) did not grow in 2025, the total number of companies in the food industry declined by 1.2 percent compared to 2024, falling to 9,045 companies. The number of jobs in the food and beverage industry remained unchanged in 2024 and totaled 162,000 jobs.

What is Driving the Food Industry

The Dutch food industry remains a stable pillar of the economy within an increasingly complex landscape. Geopolitical tensions, shifts in international trade, and the lingering effects of inflation are felt across every link of the supply chain. High costs for raw materials, energy, and labor exert sustained

[1] USD 1 = 0.886

pressure on profit margins and prices, while the debate regarding the affordability of groceries continues in both politics and the media. Once again, the Federation observed that in 2025 – despite the significant price increases of recent years – the Dutch grocery basket remains relatively affordable from a European perspective.

Labor costs also play a crucial role in the industry's expenses. The wages set by collective labor agreements (including special allowances) grew steadily in 2021 but saw a sharper increase in 2022 and 2023. By July 2023, collective labor agreement wages were over 12 percent higher than in January 2021. Within the EU, Denmark, the Netherlands, and Finland already had some of the highest labor costs in 2021, while Bulgaria and Romania had the lowest. In the first quarter of 2024, the number of job vacancies fell by almost ten percent compared to the same period in 2023, suggesting a decrease in labor market tightness. However, the labor shortage is expected to persist in the coming years, and a further rise in personnel costs is likely due to increases in wages. Additionally, finding and retaining skilled staff remains a challenge, further compounding rising wage costs.

The discussion regarding food prices is lively during times of inflation. In 2024, the average cost of processed food and non-alcoholic beverages in the Netherlands was lower than in most other Eurozone countries. In 2024, a Dutch consumer was able to purchase 'the same quantity of groceries' for $1 as the average European could for $1. On average, food products were relatively more expensive in nearby countries such as Germany, Belgium, France, and Italy. The average cost of alcoholic beverages in the Netherlands was virtually equal to the European average and Dutch consumers were able to purchase 'the same quantity of alcoholic beverages' for $1 as the average European could for $1. Alcoholic beverages were relatively inexpensive in Italy and Germany, whereas they were relatively expensive in Belgium.

Table 1. Advantages and Challenges

Advantages – U.S. Supplier strengths and Market Opportunities	**Challenges – U.S. Supplier weaknesses and Competitive Threats**
U.S. suppliers are professional, deliver food ingredients with a consistent high quality, and have a wide product range. Dutch food processing companies have had positive experiences working with U.S. suppliers.	U.S. suppliers of beef from hormone-treated cattle, poultry, and products containing genetically engineered-derived ingredients that are not EU approved cannot export to the Netherlands.
U.S. producers tell a good story about their heritage, sustainability, and quality. Strong demand for ingredients with a special claim and sustainable production methods.	The EU has several Free Trade Agreements (FTAs) that may advantage other 3rd country competitors.
The Netherlands is the most important gateway for U.S. food ingredients to the European Union (EU) as the specialized traders and food processing companies are often located in the Netherlands.	Transatlantic transportation is costly, takes time, and requires the use of containers. U.S. products are subject to import tariffs and non-tariff trade barriers.

SECTION II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

The first step for U.S. manufacturers of food ingredients that would like to start exporting to the Netherlands is to make sure your product is eligible to be imported into the Netherlands followed by whether there is a potential market for their product. It is important to gain a good understanding of who the buyers, distributors, and end-users will be.

After ascertaining whether there is a market for your product, it helps to understand the supply chain and the role of the various players have. Dutch buyers of U.S. food ingredients can be both specialized importers, as well as food processing companies.

Trade shows serve as a springboard into the market, to establish new trade contacts, and to gauge product interests. U.S. exporters are encouraged to exhibit at one of the shows in the United States as Dutch buyers regularly attend these shows as well. Visiting or exhibiting at trade show in Europe may be considered as well, and depending on your product, one of the following trade shows. Trade Missions, which are often organized around trade shows in the United States or other industry trade events, have also proven to be an excellent platform for U.S. companies to meet with Dutch buyers.

Table 2. Trade Shows in Europe

Leading Trade Shows in Europe	
SIAL, Paris, France Europe’s largest food & beverages show (alternating with Anuga) **USDA Endorsed** sialparis.com	ANUGA, Cologne, Germany Europe’s largest food & beverages show (alternating with SIAL) **USDA Endorsed** anuga.com
Food Ingredients Europe, Frankfurt, Germany European food ingredients show **USDA Endorsed** foodingredientsglobal.com	ISM, Cologne, Germany European confectionery and ingredients show ism-cologne.com
Fruit Logistica, Berlin, Germany European produce, dried fruit, and nuts show **USDA Endorsed** fruitlogistica.com	PLMA World of Private Label, Amsterdam, the Netherlands World’s largest private label show plmainternational.com
Fruit Attraction, Madrid, Spain Regional produce, dried fruits, and nuts show https://www.ifema.es/en/fruit-attraction	World Bulk Wine Exhibition, Amsterdam, the Netherlands Leading trade show for bulk wine. worldbulkwine.com
BioFach, Nuremberg, Germany European organic show **USDA Endorsed** biofach.de	

Source: FAS/The Hague

U.S. exporters can also consider reaching out to the U.S. State Regional Trade Groups (SRTG), a commodity Cooperator Group, and the National Association of State Departments of Agriculture to obtain additional market entry support.

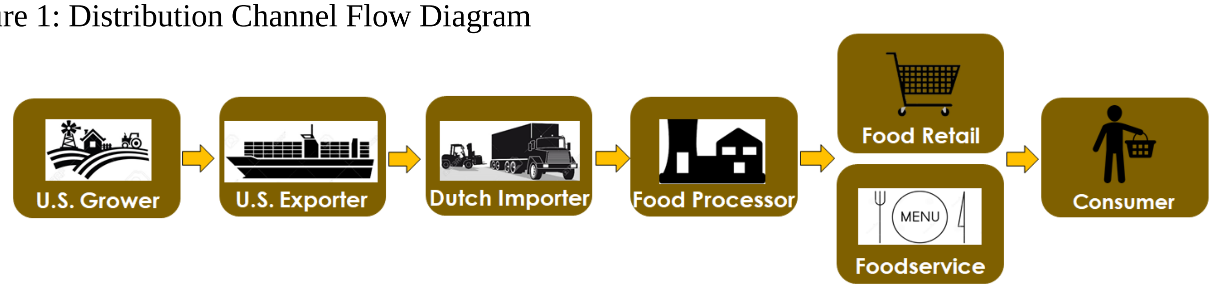
Import Procedure

While almost all import regulations and standards within the European Union (EU) are harmonized, U.S. exporters should be aware that, due to a lack of EU harmonized regulations, national measures still exist for several matters which are explained in the 2025 EU Food and Agricultural Import Regulations and Standards. This report also provides an overview of the required health certificates. It is recommended that U.S. exporters verify the full set of import requirements with their Dutch buyer. The buyer and local freight forwarder or customs agent are often in the best position to research such matters, advise U.S. exporters, and verify it with the Netherlands Food and Product Safety Authority. The final approval of any U.S. product is subject to the Dutch rules and regulations as interpreted by border officials at the time of product entry. Additional information about importing food products from the Netherlands can be found here, https://www.nvwa.nl/onderwerpen/themas/import.

Distribution Channels and Market Structure

The Dutch food processing industry is mature, well organized, has a long tradition, and has access to nearly all food ingredients. Dutch food companies will source ingredients locally and if needed internationally. Quality, availability, price, specifications, and time are all factors that are taken into consideration. For food ingredients originating from the United States, Dutch food companies often prefer to source through specialized local traders rather than sourcing directly. Only large or highly specialized food companies might opt to import ingredients directly from the United States. Many of the food companies' finished products are sold directly to food retailers and the HRI-foodservice industry, who subsequently sell the products to end-consumers.

Figure 1: Distribution Channel Flow Diagram



Share of Major Segments in the Food Processing Industry

Dairy, meat, and animal feed account for almost half of this turnover. Fresh produce, bakery, beverages, and oils & fats each have a share of approximately seven percent. The share of other foodstuffs is estimated at approximately 20 percent and includes confectionary, tea and coffee, ready-made meals, and spices & herbs.

Company Profiles and Company Products

The table below provides an overview of some of the largest Food Companies in the Netherlands. All companies supply both the food retail as well as the HRI-foodservice industry. The presented turnover figures are for 2025, unless otherwise indicated.

Table 3. Largest Food Companies in the Netherlands

Company Name	Website	Turnover, USD million	Product Group	End Use Channel
AB Inbev	Ab-inbev.com	59,320	Beer	All
Arla Foods	Arla.com	17,043	Dairy	All
Beyond Meat	Beyondmeat.com	** 335	Plant Based	All
Cargill	Cargill.com	** 154,000	Commodities	
Coca Cola	Cocacolanederland.nl	47,900	Soft drinks	All
Cono Kaasmakers	Cono.nl	#** 339	Cheese	All
Danone	Danone.com	# 27,283	Dairy	All
Dr. Oetker Nederland	Oetker-group.com	#** 4,300	Baking and Pizza	All
Heineken	Heineken.com	# 34,257	Beer	All
Jacob Douwe Egberts	Jacobdouweegberts.com	# 10,100	Coffee	All
Kraft Heinz	Kraftheinzcompany.com	24,942	Beverages, dairy, and convenience, snacks	All
Lamb Weston Meijer	Lambweston.com	6,450	Potato products	All
Mars	Mars.nl	55,000	Confectionary and sauces	All
Nestlé	Nestle.com	115,450	Coffee, pet food, chocolate, and dairy	All
Pepsico	Pepsico.nl	93,900	Soft drinks	All
Royal Cosun	Cosun.com	#** 3,439	Ingredients	All
Royal FrieslandCampina	Frieslandcampina.com	# 13,400	Dairy	All
The Greenery	Thegreenery.com	#** 768	Fresh produce	All
Unilever	Unilever.com	#** 60,761	Specialty foods	All
Van Drie Group	Vandriegroup.nl	#*** 3,400	Veal	All
Vion Food	Vionfoodgroup.com	#*** 3,130	Meat	All
Zwanenberg Food Group	Zwanenberg.nl	** 674		

Source: FAS/The Hague, industry experts, and company websites
* Estimates, ** 2024 figures, *** 2023 figures, # figures in €

Sector Trends
Rising consumer spending with stable food share: Dutch household consumption reached around $553 billion (€490 billion) in 2024, up from $530 billion (€470 billion) in 2023, with approximately $73 billion (€65 billion) spent on food and beverages. Despite this increase, food and beverage expenditure remained broadly stable at around 13 percent of total consumer spending, with growth largely driven by higher prices.

Stable category mix with gradual dietary shifts: Spending patterns within food and beverages remain relatively unchanged, led by dry groceries such as coffee, tea, sugar, and other long-life products (around 25 percent), followed by potatoes, vegetables and fruit (19 percent), and meat and meat products (15 percent). Over time, there has been a gradual increase in the share of fresh produce and groceries, at the expense of categories such as meat and bakery products.

Changing demographics driving new demand patterns: An aging, increasingly urban and diverse population – combined with smaller households – is driving demand for convenient, affordable, and smaller-sized food options, as well as greater product variety. At the same time, interest in certified (e.g. sustainable, organic, animal welfare) and healthier products is rising, with plant-based options becoming more mainstream alongside a growing number of flexitarians, although the Netherlands remains a highly price-driven market. More detailed information about current trends can be found in the Netherlands Exporter Guide, dated June 30, 2025.

SECTION III. COMPETITION

The table below summarizes the competitive situation U.S. suppliers face in the Dutch food processing sector in terms of regionally produced goods and imports and their respective market shares. The strengths of supplying countries and also the advantages and disadvantages of local suppliers are discussed. The statistical information is obtained from Trade Data Monitor.

Table 4: Overall Competitive Situation for Select Food Ingredients in the Netherlands, 2025

Product Category	**Leading Countries of Origins, and USA, in Percentage**	**Strengths of Key Supply Countries**	**Advantages and Disadvantages of local suppliers**
Food Preparations (HS210690) Total Imports: $2,610 million	Germany: 17% Belgium: 16% USA: 13% U.K.: 6% France: 5%	Due to proximity, neighboring countries are the leading suppliers of flavored or colored sugar, isoglucose, lactose, and glucose and maltodextrine syrups.	Food preparations are produced and used throughout the EU.
Sweetpotatoes (HS071420) Total Imports: $226 million	Egypt: 56% USA: 23%	Egypt is gaining ground in the Dutch import market by offering lower prices, closer proximity, favorable seasonal availability, and rapidly expanding supply.	Egypt has also benefited from supply gaps in Europe and strong EU demand for sweet potatoes. The Netherlands acts as a distribution hub for Europe.
Mixtures or preparations of animal or	Belgium: 31% USA: 23% Germany: 7%	EU demand for oils and fats is growing due to advanced biofuels	EU availability of animal and waste fats is limited.

vegetable fats or oils (HS151790) Total Imports: $298 million	Poland: 6%	production.	
Peanuts (HS120242) Total Imports: $625 million	Argentina: 69% China: 9% Brazil: 6% USA: 6%	Argentina is outperforming the USA in the Dutch peanut import market because its industry is highly export-oriented and most production is destined for export markets like the Netherlands	No local supply.
Odoriferous Substances (HS330210) Total Imports: $1,006 million	Ireland: 67% Germany: 11% USA: 7% U.K.: 4%	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: $660 million	France: 17% USA: 15% Germany: 15% Belgium: 11% China: 8%	Peptones are used by producers of food supplements and are locally available.	EU suppliers are often at a price disadvantage compared to EU suppliers, mainly due to shipping time, shipping costs, and taxes.
Almonds (HS080212) Total Imports: $329 million	USA: 80% Spain: 10% Germany: 4% Australia: 2%	The U.S. dominates international almond trade while Spain is located closer to the Netherlands and part of the European Union.	The food processing industry needs more almonds than Spain can supply.
Cranberries (HS200893) Total Imports: $117 million	USA: 46% Canada: 35% Chile: 12%	Leading supplier of cranberries is the USA, followed by Canada and Chile.	No real local availability. There is a strong demand for cranberries which are now used in a variety of food and drink products.
Walnuts (HS080232) Total Imports $118 million	USA: 23% Chile: 22% Germany: 15% China: 12%	The USA competes directly with suppliers that have closer proximity to the Netherlands and more competitive pricing.	Growing demand from the snack industry. Walnuts benefit from their healthy reputation.
Pistachios (HS080251)	USA: 72% Germany: 22%	The U.S. dominates the international pistachios	There are no local suppliers. Germany re-

Total Imports: $104 million		trade.	exports pistachios.
Alaska Pollock Fillets (HS030475) Total Imports: $132 million	USA: 66% China: 18% Russia: 6%	The USA leads the supply of whole Alaska Pollock where imports from China are focused on fillets. Russia is excluded from the 2024-2026 EU Autonomous Tariff Quota (ATQ).	No availability or not enough local availability of competitive fish fillets.

Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS

This section identifies the best product prospects by category and product.

Products Present in the Market with Good Sales Potential

- Food ingredients (food preparations and protein concentrates, essential oils, odoriferous substances, peptones and derivates, and enzymes)
- Alcoholic beverages (whiskies, Ready-To-Drink mixes, wine, beer, and "no & low" alcoholic beverages)
- Seafood (whole flat fish, salmon, and hake)
- Nuts (almonds, pistachios, hazelnuts, and pecans)

Products Not Present in the Markets with Good Sales Potential

- Food ingredients with special certification
- Pulses

Products Not Present due to Significant Barriers

- Poultry
- Flour bleaching agents
- (Products containing) GMO derived ingredients that are not EU approved
- Products need to have a warning label if it contains 'Southampton Six' colors

Links to Top Food Processing Companies
See table 3.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

The Federation of the Dutch Grocery and Food Industry (FNLI)
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www.fnli.nl

The Netherlands Food and Consumer Product Safety Authority, or NVWA, is the name of the Dutch food safety authority. It is an independent agency in the Ministry of Agriculture, Fisheries, Food Security, and Nature. The NVWA monitors animal and plant health, animal welfare, and the safety of food and consumer products, as well as enforcing nature legislation, https://english.nvwa.nl/about-us/organisation.

The Netherlands Food and Consumer Product Safety Authority (NVWA)
PO Box 43006, 3540 AA Utrecht, the Netherlands
Email: info@nvwa.nl
Website: https://english.nvwa.nl/

Ministry of Agriculture, Fisheries, Food Security, and Nature
P.O. Box 20401, 2500 EK The Hague, the Netherlands
Website: https://www.government.nl/ministries/ministry-of-agriculture-fisheries-food-security-and-nature

If you are a U.S. interested party with questions or comments regarding this report, need assistance exporting to the Netherlands, or are seeking information on potential foreign buyers of consumer-oriented products and seafood products, please contact the Foreign Agricultural Service:

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Attachments:

No Attachments