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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. 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

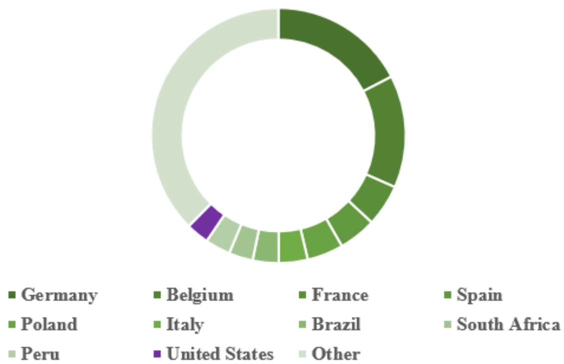

Chart 1: Top Exporting Countries to the Netherlands

Food 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.

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.

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

$68.8 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: 18.1 million

GDP: $1,298 billion (€1,150 billion)

GDP per capita: $71,670 (€63,500)

Strengths/Weaknesses/Opportunities/Challenges

Strengths:	Weaknesses:
The Netherlands is the gateway to Europe for U.S. products and the home to specialized traders and buyers of agricultural and related products. The first buyers are here.	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 first buyers 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@fas.usda.gov

SECTION I. MARKET OVERVIEW

Population and Key Demographic Trends

In 2025, the Dutch population rose to 18.1 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 previous generations.

About half of the Dutch population currently lives in cities and the overall trend of moving to urban areas is expected to continue. In the next ten years, it is expected that three-quarters of all children will be born in cities. The population of Amsterdam alone will grow by 150,000 and is expected to 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 in the European Union, after Malta.

At the beginning of 2025, there were 8.4 million private households in the Netherlands, of which 3.4 million were single-person households. This means that 19 percent of all residents live alone. On average, 2.10 people live in a Dutch household, compared to 3.45 people in 1965. Single-person households now account for 40 percent of all households, and this share is expected to continue to increase in the coming years. In Amsterdam, more than half of all households consist of a single person. The aging Dutch population is expected to want to live independently for as long as possible. At the same time, many younger adults are also choosing to live alone. An older and more individual population that increasingly lives in urban areas is expected to lead to increased demand for innovative products, smaller portions, healthy and nutritious food options, functional foods, and affordable convenience products.

Economy Size, Purchasing Power, and Consumer Behavior.

The Netherlands in a Nutshell

The Netherlands is a small country in Western Europe, and in terms of size, it is slightly bigger than the state of Maryland and smaller than the state of West Virginia. It borders with Germany to the east, Belgium to the south, and the North Sea to the northwest. The largest cities are Amsterdam, The Hague, Rotterdam and Utrecht, together referred to as the Randstad. Amsterdam is the country's capital, while The Hague is home to the Dutch seat of the government and parliament. The Netherlands’ name literally means "low countries", influenced by its low land and flat geography, with only half of its land exceeding one meter above sea level.

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 the second largest exporter of agricultural products in the world, after the United States and before Brazil and 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 and Amsterdam are Europe’s largest and fourth largest ports, respectively, 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.

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. More detailed information about the Dutch consumer market and consumer behavior can be found Sections II and IV.

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, 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 – products need to be relabeled.
Strong demand for food products with a sustainable production method. U.S. farmers have a good story to tell about land stewardship, their supply chain (farm to table), and their State/regional heritage (provenance).	Transatlantic transportation takes time which is at the expense of the shelf life. It is also costly and products from the United States are subject to import tariffs. Suppliers from other EU member states have a competitive advantage on tariffs and non-tariff trade barriers.
Growing demand for comfort food, innovative food concepts, affordable convenience, 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 gateway for U.S. products to Europe.	U.S. beef from hormone-treated cattle, poultry, flour bleaching agents, certain colors, allulose, 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. The EU is currently in negotiations with MERCOSUR.
	Fierce competition on price, quality, uniqueness, and innovation.

Source: FAS/The Hague

SECTION II. EXPORTER BUSINESS TIPS

Market Research

Other exporter assistance and market research reports can be downloaded from the FAS' Global Agricultural Information Network (GAIN): https://gain.fas.usda.gov/#/search.

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 discission 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 distributors. These distributors are experienced 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 Netherlands Food Retail Market and the Netherlands Foodservice Market.

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:
VIV Europe	Animal husbandry industry players	June 2-4, 2026	https://europe.viv.net/
BBB & Folie Culinaire	Local high-end gastronomy	October 5-7, 2026	https://www.bbbmaastricht.nl/folie-culinaire/
WBWE (World Bulk Wine Expo)	International buyers of (private label) bulk wine	November 30-December 1, 2026	https://worldbulkwine.com/newfront

Horecava	Foodservice HRI industry buyers	January 11-14, 2027	http://horecava.nl/
PLMA (Private Labeling Manufacturing Association)	International buyers of private label products	May 25-26, 2027	https://www.plmainternational.com/

Source: FAS/The Hague

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

Information about customs clearance, required documentation for U.S. products imported into the Netherlands, 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, and vegetarian and vegan products, among others.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Key Developments in the Food Industry

Strong Demand for Food Labeled Sustainable Products
Consumer consciousness about how food products are produced is growing. Wageningen University and Research (WUR) annually publishes the “Sustainable Food Monitor” (Monitor Duurzaam Voedsel) report, which provides an overview of consumer spending on sustainable food in the Netherlands. Total consumer spending on products certified as sustainable grew by 4 percent in 2024 to €14.3 billion ($16.8 billion). The share of food labeled sustainable compared to total spending on food stabilized around 21 percent. Sustainable food labeled products are recognizable to consumers when they have a quality mark. Products with the ‘Better Life’ (Dutch: Beter Leven) quality mark were most popular, followed those with the ‘Rainforest Alliance’ quality mark and organic certified products. Most of the spending takes place in the supermarket due to wider availability of sustainable products.

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.

Table 3. Best Consumer-Oriented Product Prospects

Commodity (HS code)	**Imports, million USD, 2025**	**Imports from U.S., million USD, 2025 (U.S. market share)**	**Estimated average annual import growth**
Vodka (HS: 220860)	132	45 (34 %)	50 %
Water (HS: 220190)	76	7 (9 %)	20 %
Liqueurs (HS: 220870)	335	182 (54 %)	50 %
Spices (HS: 091099)	30	1 (4 %)	25 %
Pistachios (HS: 080251)	105	76 (73 %)	50 %

Source: Trade Data Monitor

Price Remains a Key Purchasing Factor
Most Dutch consumers remain highly price conscious and increasingly compare prices across multiple supermarkets in search of the best value. Rising food prices continue to shape purchasing behavior, driving a stronger shift toward private-label products and away from premium A-brands, with the price gap between the two now reaching nearly 40 percent. As a result, consumers are also trading down within categories, opting for smaller portions of meat, cheaper cuts, or replacing meat with vegetables and plant-based alternatives to manage household budgets.

At the same time, the demand for food assistance continues to grow. In 2025, Voedselbanken Nederland provided weekly food aid to 35,860 households, supporting around 155,600 individuals, reflecting a continued increase compared to previous years. This highlights a more divided consumer landscape: while sustainability, authenticity, health, and nutrition remain important drivers of food choices for one segment of the population, a significant group is primarily guided by price, and for those under the greatest financial pressure, access to food assistance has become essential to make ends meet.

Links to access retailer-specific information and expected growth rates of each sector, as well as a qualitive 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 Netherlands Food Processing Ingredients Market, the Netherlands Food Retail Market, and the Netherlands Foodservice Market.

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

Table 4. Netherlands' Imports of Consumer Oriented and Seafood Products, 2025 figures

Product Category (Product Code) Imports in Millions of US$	Main Suppliers, By Percentage		Strengths of Key Supplier Countries	Advantages and Disadvantages of Local Suppliers
Sweetpotatoes (HS071420) Total Imports:	1. Egypt 2. USA	56 23	Egypt is gaining ground in the Dutch import	Egypt has also benefited from supply gaps in Europe and strong EU

$227 million From USA: $52			market by offering lower prices, closer proximity, favorable seasonal availability, and rapidly expanding supply.	demand for sweet potatoes. The Netherlands acts as a distribution hub for Europe.
Distilled spirits (Product group) Total imports: $1,719 From USA: $468	1. USA 2. U.K. 3. Germany 4. Belgium	27 16 13 12	Competition from good quality products produced in neighboring countries.	Strong demand for liqueurs and whiskies with funky labels, innovative tastes, and that have a story to tell.
Seafood products (Product group) Total imports: $6,309 From USA: $143	1. Iceland 2. Norway 3. Germany 4. Faroe Islands 5. Belgium 15. USA	16 10 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, serving foodservice markets and retail throughout Europe, and increasingly depending on imports for Alaska Pollack, scallops, wild salmon, shrimp & prawns, sole, plaice, cod, and lobster.
Beef and beef products (Product group) Total imports: $3,860 From USA: $186	1. Germany 2. Belgium 3. Poland 4. Argentina 8. USA	17 10 9 8 5	Germany, Belgium, and Poland are close to the market.	There is a shortage of high quality, consistent, grain fed, tasty, and marbled beef.
Condiments & sauces (Product group) Total imports: $920 From USA: $18	1. Germany 2. Belgium 3. Italy 4. Thailand 11. USA	19 16 11 7 2	Good quality and taste sauces are locally available and benefit from its proximity and being in the EU market.	Demand for good quality, tasty, and unique, yet affordable condiments and sauces.

Walnuts (HS080232) Total Imports $118 million From USA: $28	1. USA 2. Chile 3. Germany 4. China	23 22 15 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.
Food Preparations (HS210690) Total Imports: $2,610 million From USA: $339	1. Germany 2. Belgium 3. USA 4. U.K. 5. France	17 16 13 6 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.
Odoriferous Substances (HS330210) Total Imports: $1,005 million From USA: $72	1. Ireland 2. Germany 3. USA 4. U.K.	67 11 7 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: $662 million From USA: $98	1. France 2. USA 3. Germany 4. Belgium 5. China	17 15 15 11 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.
Sugar and sugar confectionary (HS17) Total imports: $1,835 From USA: $35	1. Germany 2. Belgium 3. France 10. USA	31 23 11 2	First three countries are close to the market and offer good quality products while the USA produces candy that is innovative in color, smell, taste, packaging and theme.	Demand for sweet and spicy (swicy) candy with bold colors and new taste combinations in fun packaging from the United States, driven by social media. Products from collaborating brands are popular.

Source: Trade Data Monitor

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Agricultural & Food Import Statistics
Dutch import statistics of U.S. agricultural and food products can be downloaded from the following website https://apps.fas.usda.gov/gats/default.aspx. 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 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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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.

Attachments:

No Attachments