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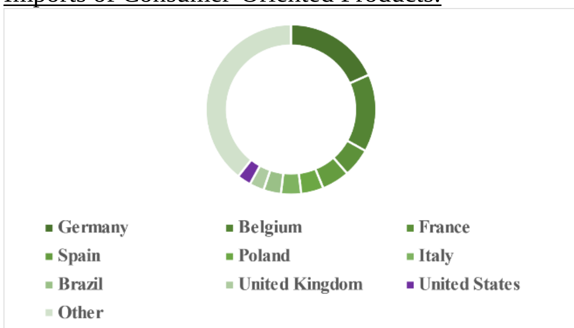
Report Highlights:

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 largest importing country within the EU and the third largest exporter of agricultural products in the world.

Imports of Consumer-Oriented Products:



Source: Trade Data Monitor

Food Processing Industry:
Over 8,435 food companies in the Netherlands generated net sales of $99 billion in 2023. 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 (with less than 10 employees).

Food Retail Industry:
The Dutch retail sector is rather consolidated, employing over 300,000 people, and operating in an estimated 6,130 stores. The sector's turnover was valued at $54 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.

Foodservice – HRI Industry:
Last year its turnover was up by nine percent and valued at $16.7 billion. Although this time turnover was up due to inflation. At the same time, rising costs of living are negatively impacting the frequency the Dutch are visiting foodservice establishments. The competition between foodservice companies and food retailers intensified with the latter investing in the delivery of ready meals and meal kits and expanding the number of convenience stores.

Quick Facts CY 2023
Imports of Consumer-Oriented Products, total:
$56.9 billion

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

1. Fresh fruit	6. Fresh vegetables
2. Dairy products	7. Poultry products
3. Bakery goods	8. Processed vegetables
4. Flowers, nursery prod.	9. Wine
5. Cocoa products	10. Juices

Food Industry by Channels 2023, in $ billion:

Consumer-Oriented Products Imports	$57
Consumer-Oriented Products Exports	$105
Agricultural & Related Products Imports	$109
Agricultural & Related Products Exports	$153
Food Industry	$99
Food Retail	$54
Food Service	$17

Top 10 Food Retailers, Market Share:

Albert Heijn	37.1%	Deka	2.0%
Jumbo	21.1%	Hoogvliet	2.0%
Lidl	10.6%	Spar	1.7%
Plus/Coop	9.5%	Jan Linders	1.1%
Aldi	5.2%	Poiesz	1.0%

GDP/Population:
Population: 17.9 million
GDP: $1,048 billion (€964 million)
GDP per capita: $58,404 (€53,732)

Strengths/Weaknesses/Opportunities/Challenges

Strengths:	Weakness:
U.S. producers offer a great variety of food products with a consistent quality and have a great story to tell about sustainability and their heritage.	Transatlantic transportation is costly and takes time. Some U.S. food products suffer from a negative perception among Dutch consumers due to misinformation.
Opportunities:	**Threats:**
There is a growing demand for products with a sustainable production method and products that are healthy, nutritious, innovative, tasty, and convenient.	There is fierce competition on price, quality, uniqueness, and innovation from other EU member states. The Netherlands is a price market.

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 2024, 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 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.

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 the third largest exporter of agricultural products in the world, after the United States and Brazil 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 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.

The GDP of the Netherlands is estimated at $1,048 billion, or $58,404 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 CPB Netherlands Bureau for Economic Policy Analysis published on February 22 its latest projections in the Central Economic Plan 2024 (CEP). After a year of stagnation, the Dutch economy is returning to a moderate growth trajectory. Dutch households, at the same time, will see their purchasing power recover in 2024, by 2.7 percent. Finally, CPB warns the government deficit will exceed the EU-mandated three percent limit by 2028 without changes to current expenditure plans. More detailed information can be found on the website of the CBP, https://www.cpb.nl/en/projections-february-2024-cep-2024. On November 22, 2023, general elections were held to elect the members of the House of Representatives, followed by the process of cabinet formation. After almost six months of negotiations, four political parties PVV, VVD, NSC, and BBB reached an agreement to form a coalition. It is expected that the new cabinet Schoof will commence the beginning of July 2024.

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.
Strong demand for food products with a sustainable production method. 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. 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, 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 the European Union.	U.S. beef from hormone-treated cattle, poultry, flour bleaching agents, 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

Market Research

Other exporter assistance and market research reports can be downloaded from the following website: 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 traders. These traders 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 Dutch Food Retail Market – June 28, 2023 and the Dutch Foodservice Market – September 22, 2023.

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:**

BBB & Folie Culinaire	Local high-end gastronomy	October 7-9, 2024	https://www.bbbmaastricht.nl/folie-culinaire/
FFFFE (Free From Functional Food Expo)	Buyers of innovative products with a free from, vegan, and organic claim	November 5-6, 2024	https://amsterdam.freefromfoodexpo.com/
WBWE (World Bulk Wine Expo)	International buyers of (private label) bulk wine	November 25-26, 2024	https://worldbulkwine.com/newfront
Horecava	Foodservice HRI industry buyers	January 13-16, 2025	http://horecava.nl/
PLMA (Private Labeling Manufacturing Association)	International buyers of private label products	May 20-21, 2025	https://www.plmainternational.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 among others he 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

Strong Demand for Sustainable Food Products

Dutch food retailers prefer to source food products which are either produced sustainably or obtained in a sustainable manner. Wageningen University and Research (WUR) annually publishes the "Monitor Duurzaam Voedsel" report, which provides an overview of consumer spending on sustainable food in the Netherlands. The most recent figures available are for 2022. Total consumer spending on foods certified as sustainable grew by 13 percent in 2021 to $11 billion (€10.8 billion). The share of sustainable food compared to total spending on food slightly decreased from 19 to 18 percent in 2022 which is mainly due to rising food prices and the shift in consumer demand, post COVID-19, from retail back to the HRI foodservice industry.

Sustainable food products are recognizable to consumers when they have a quality mark. Products with the '[Better Life]' (Dutch: Beter Leven) quality mark were sold the most (€3.8 billion) followed by product with the '[Rainforest Alliance]' quality mark (€2.6 billion) and products labeled [organic] (€1.8 billion) and. A wider range of certified products and changing consumer preferences — paying more attention to sustainability and health — has explained the growth in demand for these products. Most of the spending takes place in the supermarket, mainly due to a wider availability of sustainable products. It is expected however that spending on sustainable certified products in 2023 will continue to be under pressure since the overall costs of living has gone up in the Netherlands.

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 a 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
Due to the rising costs of living, 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 (or smaller portions), cheaper variants (such as minced meat, chicken, and 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 now become the most important factor.

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

Table 3. Best Consumer-Oriented Product Prospects

Commodity (HS code)	**Imports, million USD, 2023**	**Imports from U.S., million USD, 2023 (U.S. market share)**	**Estimated average annual import growth**
Bread, pastry, cakes (HS190590)	1,473	33 (3 %)	13 %
Wine (HS220421)	1,368	27 (2 %)	7 %
Whiskies (HS220830)	848	163 (19 %)	40 %
Sugar confectionary (HS170490)	618	20 (3 %)	50 %
Coffee extracts (HS210111)	265	20 (8 %)	15 %

Peas (HS071310)	59	2 (4 %)	40 %
Hake (HS030474)	56	7 (13 %)	50 %

Source: Trade Data Monitor

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 Dutch Food Processing Ingredients Market – April 22, 2024, the Dutch Food Retail Market – June 28, 2023, and the Dutch Foodservice Market – September 22, 2023.

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

Table 4. Netherlands' Imports of Consumer Oriented and Seafood Products, 2023 figures

Product Category (Product Code) Imports in Millions of USD	Main Suppliers, By Percentage		Strengths of Key Supplier Countries	Advantages and Disadvantages of Local Suppliers
Craft beer (HS2203) Total imports: $666 From USA: $4	1. Belgium 2. Germany 3. Poland 4. Mexico **9. USA**	60 10 6 5 **1**	Local breweries brew good quality and innovative craft beer and compete directly with U.S. breweries.	Strong demand for new flavors, funky labels, and innovative tastes.
Sweet potatoes (HS071420) Total imports: $67 From USA: $30	**1. USA** 2. Egypt	**44** 35	Competition from Egypt, China, and Honduras.	The availability of fresh and processed sweet potato products continues to grow. Strong demand for variety and quality.
Distilled spirits (Product group) Total imports: $1,571 From USA: $182	1. U.K. 2. Germany 3. Belgium **4. USA**	24 16 12 **12**	Competition from good quality products produced in neighboring counties, 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**	15 11 8 6 5 **2**	Iceland and Norway are the leading supplier of cod and salmon, respectively while Germany dominates Dutch imports of pelagic fish. The USA	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,

			dominates the supply of Alaska Pollack, scallops, and wild salmon. For shrimp & prawns, cod, and lobster, the USA competes with other non-EU exporters.	wild salmon, shrimp & prawns, sole, plaice, cod, and lobster.
Beef and beef products (Product group) Total imports: $2,602 From USA: $201	1. Germany 2. Belgium 3. Ireland **6. USA**	15 10 9 **8**	Germany, Belgium, and Ireland 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: $699 From USA: $17	1. Germany 2. Belgium 3. Italy 4. Thailand **11. USA**	20 18 10 8 **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: $71 From USA: $30	**1. USA** 2. Chile 3. Germany	**42** 16 13	Competition from Chile and France.	Strong demand from the bakery and snack industry. Walnuts benefit from their healthy reputation.
Food preparations (HS210690) Total Imports: $2,292 From USA: $298	1. Germany 2. Belgium **3. USA** 4. U.K. 5. France	19 16 **13** 9 9	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: $568 From USA: $62	1. Ireland 2. Germany **3. USA** 4. U.K. 5. France	43 22 **11** 6 5	Odoriferous Substances are compounds (natural and synthetic) with odors used in the manufacture of various non-food	U.S. suppliers are often at a price disadvantage compared to EU suppliers mainly due to time, shipping costs, and taxes.

			and food products and are locally available.	
Peptones and derivatives (HS350400) Total Imports: $590 From USA: $106	**1. USA** 2. Germany 3. Belgium 4. France 5. New Zealand	**18** 16 14 11 9	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.
Chewing gum & candy (Product group) Total imports: $661 From USA: $20	1. Belgium 2. Germany 3. Spain 4. Italy **8. USA**	25 23 6 6 **3**	1, 2, 3, and 4 are close to the market and offer good quality products.	Demand for innovative candy products – these products from the United States are popular.
Sugar and sugar confectionary (HS17) Total imports: $1,727 From USA: $45	1. Belgium 2. Germany 3. France **9. USA**	30 17 10 **3**	1, 2, and 3 are close to the market and offer good quality confectionary products.	Demand for extra sour and extra spicy candy from the United States, driven by social media
Bakery goods (Product group) Total imports: $3,471 From USA: $45	1. Belgium 2. Germany 3. France 4. Italy **13. USA**	28 26 7 6 **1**	Local availability of good quality pastries and cakes.	Growing demand for pastry and cakes containing chocolate or confectionary.

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 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:

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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