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Food Service - Hotel Restaurant Institutional

The Dutch Food Service Report

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Report Highlights:

The Dutch foodservice industry is expected to grow annually by four percent due to a recovering economy and changing consumer eating culture. The growing segments within the foodservice industry are specialist coffee shops, 100% home delivery/takeaway, juice/smoothie bars and food trucks. Young consumers are increasingly looking for new and convenient food solutions. The report furthermore presents a road map for U.S. exporters who wish to expand business in the Dutch market. U.S. food products that are convenient, healthy, tasty, organic or nutritious have the best sales potential on the Dutch market.

Post:
The Hague

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Section I. Market Summary

Description and comparison of the foodservice sub sectors

The Dutch foodservice industry is composed of the following six sub-sectors: full-service restaurants, fast food outlets, cafés/bars, self-service cafeterias, 100% home delivery/takeaway and street stalls/kiosks. A brief description of each sub-sector can be found in Appendix I.

Value of the overall foodservice sales and growth rates by sub sector, past 5 years

In 2016, total sales of food product and beverages in the Netherlands were valued at roughly \$56¹ billion. Food retailers were responsible for three quarter of those sales while the foodservice industry accounted for the remaining, or \$13.3 billion. Restaurants, fast food outlets and cafés/bars were the three largest sub-sectors. In 2016 their combined sales totaled \$11.8 billion, or almost 90 percent of total foodservice sales.

Table 1. Foodservice Sales, in million USD

	2011	2012	2013	2014	2015	2016
Total Foodservice Sales	11,713	11,871	12,093	12,352	12,880	13,348

Source: Euromonitor

After several difficult years due to the financial crisis, the Dutch foodservice industry is now in better shape. The economy is recovering and consumer confidence and disposable income levels are growing. Last year, the foodservice sector grew for the third year in a row (four percent). The increase was in line with the rise in spending per transaction as well as the increase in the number of transactions, confirming that the average Dutch consumer is eating out more frequently again.

Table 2. Foodservice Sales by Sub Sector, in million USD

	2011	2012	2013	2014	2015	2016
100% Home Delivery/Takeaway	345	362	383	417	483	542
Cafés/Bars	2,568	2,574	2,571	2,585	2,666	2,806

¹ 1\$=0.85€

Full-Service Restaurants	4,582	4,663	4,746	4,858	5,096	5,335
Fast Food	3,287	3,318	3,402	3,481	3,600	3,693
Self-Service Cafeterias	686	703	738	756	775	706
Street Stalls/Kiosks	245	251	253	255	259	267

Source: Euromonitor

Annual growth rates for all sub sectors were between three and five percent except for self-service cafeterias and 100% home delivery/takeaway. After several years of positive growth rates, the turnover of self-service cafeterias dropped by almost nine percent in 2016. Chained self-service cafeterias like La Place (which was acquired by Dutch retailer Jumbo) and HEMA struggled to maintain transaction levels while independent self-service cafeterias saw their number of outlets decline.

Last year was another good year for the 100% home delivery/takeaway sub-segment. The growth rate of 12 percent was driven by strong consumer demand for convenience. Young urban consumers who live in single households are an important group, and double income households with no kids are quickly catching up. Both groups find it advantageous not to prepare food themselves while being able to stay at home. Another important target group is working consumers, mostly from the younger generation, who increasingly prefer to have food delivered or purchase takeaway rather than pack a lunch.

Expected growth rates of the foodservice sector and its sub sectors

Table 3. Expected Growth Rates of total Foodservice Sales, in Percentage

	2017	2018	2019	2020	2021
Foodservice	3.9	3.9	3.8	3.7	3.7

Source: Euromonitor

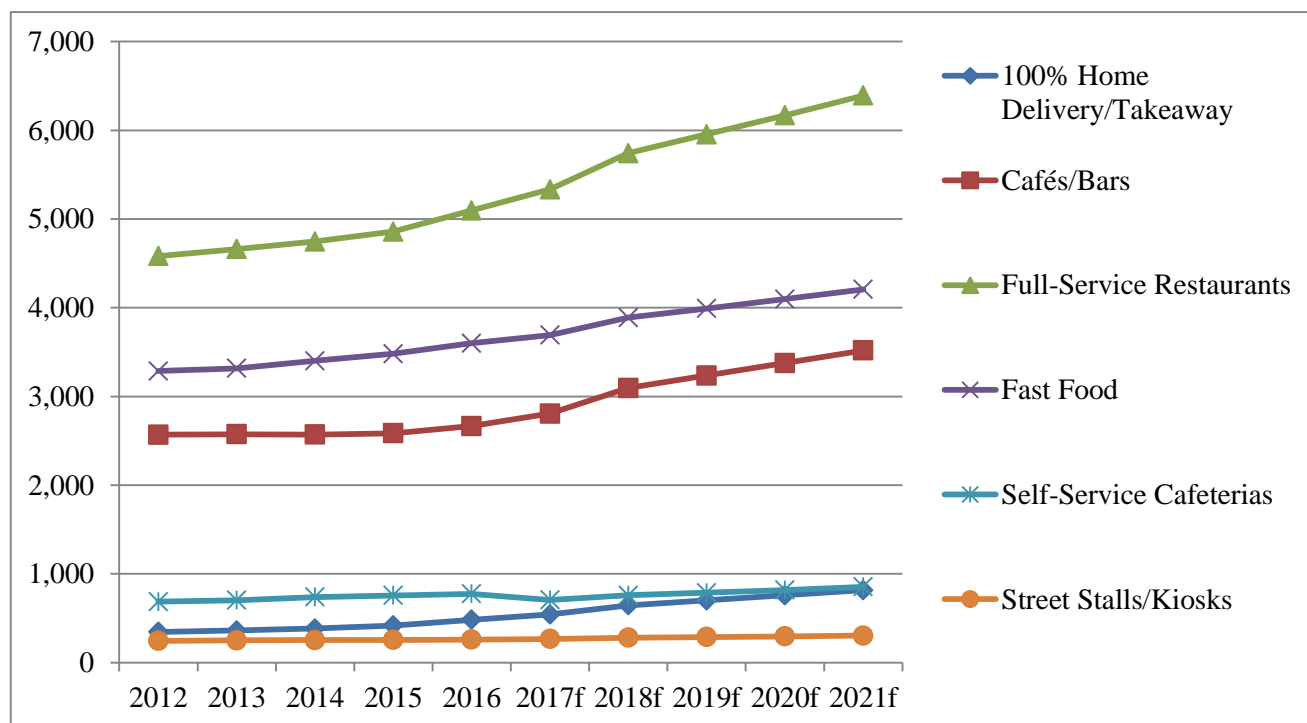
The future for the Dutch Foodservice industry continues to look bright. Annual growth rates are expected to stay at almost four percent per year until 2021. There are two main developments that drive this positive outlook. The first one is the positive performance of the Dutch economy.

The Netherlands Bureau for Economic Policy Analysis (CPB) projects annual economic growth in 2017 to be 3.3 percent, clearing the three percent barrier for the first time since 2007; however, CPB expects economic growth to consolidate at 2.5 percent in 2018. The growing Dutch economy is also reflected in a declining unemployment rate. The unemployment rate has steadily declined since it reached its peak in 2014 at 7.4 percent. This improvement is forecast to continue in 2017 (4.9 percent) and 2018 (4.3 percent), levels not seen since before the financial crisis. Inflation for both 2017 and 2018 are expected to be 1.3 percent.

The Dutch eating culture is changing; this trend is driven by the millennials². The traditional three meals-a-day (breakfast, lunch and dinner) is being replaced by five snacking moments. At the same time, eating at home is slowly transitioning to eating while traveling, working or meeting friends. Food choices and eating moments are becoming more tailor-made. These developments will all have a positive effect on consumer spending in foodservice outlets.

Figure 1: Turnover of the Consumer Foodservice Sub-Sectors, in million USD, 2012-2021

² A consumer group born between the early 1980s to around 2000.



S

Source: Euromonitor

f = forecasted sales

The importance of online ordering and delivery services is expected to grow further as the number of single person households continues to grow. There is also a growing interest in finding a good “work-life balance” resulting in more flexibility in working hours and teleworking.

Table 4. Expected Growth Rates by Sub-Sector, in Percentage

	2017	2018	2019	2020	2021
100% Home Delivery/Takeaway	9.4	8.9	8.6	8.3	7.7
Cafés/Bars	5.1	5.0	4.6	4.4	4.2
Full-Service Restaurants	3.8	3.7	3.7	3.6	3.6
Fast Food	2.6	2.7	2.7	2.6	2.7
Self-Service Cafeterias	3.6	3.6	3.8	4.0	4.4
Street Stalls/Kiosks	2.4	2.7	2.6	2.6	3.1

Source: Euromonitor

Number and type of foodservice establishments by subsector

Similar to previous years, in 2016 the total number of establishments increased by one percent. This number is not expected to change much in the coming years. Restaurants, cafés/bars and fast food outlets have the highest number of establishments.

Table 5. Number of Foodservice Establishments by Sub-Sector

	2012	2013	2014	2015	2016	2017 f	2018 f	2019 f	2020 f	2021 f
100% home delivery/takeaway	966	996	1,055	1,122	1,205	1,259	1,309	1,358	1,406	1,449
cafés/bars	12,9	13,0	13,0	12,7	12,6	12,6	12,6	12,6	12,7	12,7

	39	07	59	66	63	32	39	67	19	82
full-service restaurants	12,7 48	12,7 81	12,8 45	13,4 74	13,8 79	14,1 59	14,4 24	14,6 77	14,9 12	15,1 31
fast food	9,75 5	9,76 5	9,80 2	10,1 26	10,1 80	10,3 18	10,4 64	10,6 15	10,7 67	10,9 23
self-service cafeterias	503	510	499	520	496	512	527	542	558	576
street stalls/kiosks	2,50 2	2,52 5	2,54 9	2,59 0	2,64 4	2,70 1	2,76 3	2,83 0	2,90 1	2,97 9
Total	39,4 13	39,5 84	39,8 09	40,5 98	41,0 67	41,5 81	42,1 26	42,6 89	43,2 63	43,8 40

Source: Euromonitor

f = forecast

Value of imported food versus domestic products over the past 5 years

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 are up by six percent.

Table 6. Dutch Imports of Agricultural, Fish and Forestry Products, in Million USD

	2012	2013	2014	2015	2016
Total imports	62,563	64,604	65,332	59,447	59,121
Imports from the U.S.	2,258	2,582	2,750	2,844	2,943

Source: World Trade Atlas

Table 7. Dutch Import of Consumer-Oriented Products, in million USD

	2012	2013	2014	2015	2016
Total imports	29,576	31,292	32,803	28,732	30,741
Imports from the U.S.	844	976	1,134	1,186	1,229

Source: Global Trade Atlas

Table 8. Dutch Import of Fish and Seafood Products, in million USD

	2012	2013	2014	2015	2016
Total imports	3,023	3,067	3,560	2,969	3,228
Imports from the U.S.	95	104	121	139	131

Source: Global Trade Atlas

The Netherlands is the largest export market in the European Union (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.

The vast majority of fresh and processed food products destined for the Foodservice industry fall in the consumer-oriented and fish and seafood products category. The Netherlands is the largest market within the EU for these products from the United States. 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 9. Dutch Imports of Consumer Products, 2016			Table 10. 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

Developments and trends that affect the foodservice industry

Below are the main consumer trends in the Netherlands that will affect the foodservice market:

- Time is becoming scarce as consumers are busy with work, school, hobbies, sports and other (social) engagements. There is less time for cooking and as a result a growing demand for convenience. Eating is increasingly combined with travel, meeting friends, working or studying.
- There is a growing demand for single portion food solutions as the number of single households is growing. Also family members are not eating together at the same time anymore; eating becomes more individual and tailor-made.
- Consumers are also increasingly 'engaged'. They are more than ever interested in fair-trade, animal welfare, buying local, organic food products and sustainable production methods. This type of consumer, often young and urban, is interested to hear the story behind the product. They are looking for real products, real ingredients and real stories. This especially applies to full-service restaurants.
- It is very common in the Netherlands to have a smart phone. Consumers inform themselves by visiting websites of foodservice outlets and they take decisions online. Sending an email, a text message or what's app is preferred above ringing up a restaurant.
- Through social media consumers inform one another about 'what's hot' and 'what's not'. What was the service like? Was the food any good? Where there any extras? What was the atmosphere like? Was it affordable? These are all part of the discussion. Pictures of the dishes, along with a comment, are often

shared through social media. Consumers use platforms like iens.nl, eetnu.nl, zoover.nl and tripadvisor.nl to recommend a foodservice establishment or not.

- The number of international tourists that visit the Netherlands is growing. Foodservice establishments are likely to benefit by drawing in more tourists as customers. This also means that more customers will order and will want to learn about what food or dishes are offered in English. Product information, service and hospitality are ‘key’ for tourists.
- The leading player in the online ordering segment is third-party ordering service Takeaway.com, which operates in the Netherlands under the brand name Thuisbezorgd.nl. This Dutch company remains by far the most important player. In addition to 100% home delivery/takeaway businesses, such as Domino’s Pizza and its local Dutch counterpart New York Pizza, other third-party online ordering services such as Foodora and Deliveroo have also established a growing presence in the premium food niche market. Online ordering is expected to record consistently healthy growth rates over the forecast period because there are several factors supporting continued growth in online ordering: First, internet use and smartphone possession rates are steadily expanding. Second, as new generations that grew up and are familiar with online ordering pass into adulthood, the share of Dutch consumers familiar with online ordering will keep increasing. Finally, certain lifestyle trends such as greater mobility, both for work and spare time, will increase consumer demand for convenience.

Table 11. Advantages and Challenges U.S. Exporters Face in the Netherlands

Advantages (product strengths and market opportunities)	Challenges (product weakness and competitive threats)
Favorable image of U.S. products.	Transatlantic transportation is costly and takes time (three to five weeks).
Affluent, curious and open-minded consumers.	Fierce competition on price, quality, unique-ness and innovation.
The foodservice industry is fragmented (often family run businesses) and therefore flexible enough to meet changing consumer demands.	Profit margins on food are thin while the margins on beverages (including wines and beer) are higher.
Growing demand for organic products, sustainable production methods, nutritious food products and food products that contribute to a healthier lifestyle.	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.
Interest in experimenting with new and innovative products and/or concepts.	Non-NHTC beef, poultry, shellfish and products containing GMO derived ingredients that are not EU approved cannot be exported to the Netherlands.

Section II. Road Map for Market Entry

A. Entry Strategy

Success in introducing your product in the Dutch market depends on the level of market knowledge. The Office of Agricultural Affairs in The Hague writes several exporter assistance reports, such as the [GAIN NL7040 – The Dutch Food Processing Ingredients Report, December 4, 2017](#), the [GAIN NL6037 – The Dutch Food Retail Report, December 14, 2016](#), the [GAIN NL7026 – Exporter Guide September 20, 2017](#) and the [GAIN NL7005 – Food and Agricultural Import Regulations and Standards Report, February 9, 2017](#). These and other commodity reports will help you to understand the Dutch market. These and other reports can be downloaded on the following website <http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx>.

The relationship with the buyer is also very important. Not only does the importer know the market, he also knows what document and certificate needs to accompany your product. Final approval of any product is subject to the Dutch rules and regulations as interpreted by border officials at the time of product entry, see [GAIN NL7005 – Food and Agricultural Import Regulations and Standards Report, February 9, 2017](#) for more information.

There are several options on how to enter the Dutch market. U.S. exporters may consider exhibiting at a HRI Foodservice 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 a European trade show, some of which are USDA Endorsed.

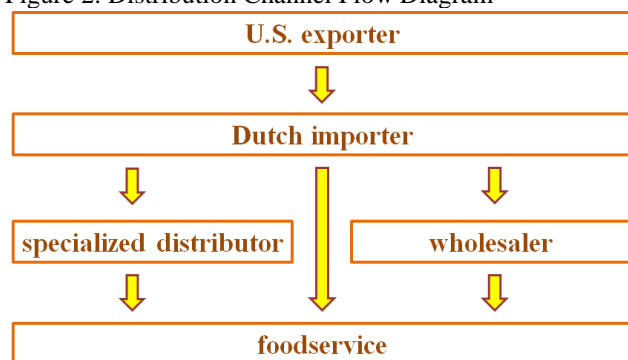
Trade shows can serve as a springboard into the market, helping companies to establish new trade contacts and gauge product interests. Dutch buyers visit these shows and often have an exhibitor booth as well. FAS The Hague compiles a complete list of trade shows frequently visited by buyers of the Dutch HRI Foodservice industry. This list can be found in Appendix II or on the fas-europe.org website.

U.S. exporters can also contact their respective U.S. State Regional Trade Group (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 overall Dutch foodservice industry is highly fragmented and characterized by independent entrepreneurs. This is especially the case for cafés/bars, restaurants, cafeterias and street stalls/kiosks. The majority of fast food outlets on the other hand are not fragmented as they are often part of a chain. Well-known examples of chained fast food outlets in the Netherlands are McDonalds, Burger King, KFC, DéliFrance and Bakker Bart, together responsible for 60 percent of the fast food market. Also 100% delivery/takeaway outlets are often part of a larger chain. Domino's Pizza, New York Pizza and Spare Rib Express are all active on the Dutch market.

Figure 2. Distribution Channel Flow Diagram



Source: FAS The Hague

Independent foodservice entrepreneurs (foodservice buyers that are not part of a chain) tend to buy through different channels than is indicated by the figure above. In general all products are delivered. The entrepreneur does not have the time to go to a shop to buy the ingredients he needs that week. Also there is always the risk that products are not in stock. By ordering the products and having them delivered, the entrepreneur knows he will have the right quantities at the right time.

Appendix III gives an overview of all wholesalers active in the Netherlands. Almost all wholesalers have shops and delivery services. HORESCA has no shops and only deliver their products while Marko only has shops and hardly delivers. Most wholesalers operate nationwide with the exception of Kweker, Zegro and HORESCA who are active regionally.

Fresh products like bread, cakes, produce and dairy products are predominantly bought via specialized distributors. The added value lies in the possibility to have tailor-made orders, the interpersonal relationship and the guarantee you will receive the product in the right amount. Depending on the product, distributors source their products directly from primary producers, food companies or Dutch importers. In some cases the distributor and the importer are the same company. This is especially the case for fresh products like meat and seafood.

For shelf stable grocery products, such as spices, nuts, sauces, and cooking ingredients, foodservice entrepreneurs turn to wholesalers. Wholesalers traditionally do not import from outside the European Union but work with specialized importers.

Alcoholic drinks like beer and wines are often bought directly from a brewery and local wine importer who also buy directly from the foreign supplier.

C. Sub Sector Profiles

Table 12. Top Five Largest Fast Food Companies, in million USD

	Name	Sub sector	2014	2015	2016
1	McDonalds	Fast food	733	674	732
2	Burger King	Fast food	102	96	102
3	KFC	Fast food	93	93	100
4	Subway	Fast food	52	50	53
5	FEBO	Fast food	42	38	40

Source: Misset Horeca

Table 13. Top Five Largest 100% Delivery/Takeaway Companies, in million USD

	Name	Sub sector	2014	2015	2016
1	Domino's Pizza	100% delivery/takeaway	80	96	120
2	New York Pizza	100% delivery/takeaway	61	63	73
3	Spare Rib Express	100% delivery/takeaway	17	16	19
4	Verhage	100% delivery/takeaway	16	15	15
5	Taco Mundo	100% delivery/takeaway	-	-	9

Source: Misset Horeca

Table 14. Top Five Largest Self-Service Catering Companies, in million USD

	Name	Sub sector	2014	2015	2016
1	NSRetail	self-service catering	-	325	361
2	Host Marriott Service	self-service catering	-	130	187
3	Vermaat Groep	self-service catering	124	135	175
4	HEMA	self-service catering	118	111	118
5	Albron	self-service catering	110	103	108

Source: Misset Horeca

Table 15. Top Five Largest Full Service Restaurants, in million USD

	Name	Sub sector	2014	2015	2016
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1	Van Der Valk	full service restaurants	661	605	632
2	Landal Greenpark	full service restaurants	331	306	329
3	Accor Hotels	full service restaurants	254	239	276
4	NH Hotels	full service restaurants	247	235	251
5	Hampshire hospitality	full service restaurants	208	185	200
6	Louvre Hotel Group	full service restaurants	-	162	163
7	Center Parcs	full service restaurants	-	-	155
8	Fletcher Hotels	full service restaurants	-	119	145
9	Best Western	full service restaurants	-	115	130
10	Hilton	full service restaurants	-	135	125

Source: Misset Horeca

A list of Dutch wholesalers can be found in Appendix III.

Section III. Competition

This section summarizes the overall competitive situation that U.S. suppliers face in the food service market and their market share. In addition the strengths of the key supplying countries and the advantages and disadvantages of local suppliers are discussed per product category.

Table 16. Competitive Situation U.S. Suppliers Face in the Dutch Foodservice Market

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of local suppliers
Scallops HS030729 Total imports: 94.5 million USD	1. United States 36% 2. Japan 25% 3. Argentina 16% 4. Peru 9% 5. Russia 6%	Growing demand for price competitive good quality scallops. On the Dutch market, the United States is facing increasingly competition from Japan, Argentina, Peru and Russia.	There is no local supply of scallops; they are all imported from outside the EU.
Cod (HS030471) Total imports: 240.9 million USD	1. Russia 42% 2. Iceland 35% 3. Norway 10% 4. China 7% 9. United States 0%	Growing demand for cod while imports from leading supplier Russia is slowly decreasing, imports from all other leading suppliers is up.	Not enough local supply to meet demand.
Lobster (HS030612) Total imports: 10.9 million USD	1. Canada 74% 2. United States 6%	Growing demand in the high-end HRI industry for good quality lobsters is growing. Canada and the United States are the only suppliers of this type of lobsters. Other suppliers (Belgium, Germany and the U.K.) are re-exporting North American lobsters.	No local supply as European lobsters differ in size.

<p>Craft Beer (HS2203)</p> <p>Total imports: 293.5 million USD</p>	<p>1. Belgium 57%</p> <p>2. Germany 24%</p> <p>3. France 5%</p> <p>4. The U.K. 2%</p> <p>5. United States 2%</p>	<p>Most of the supplying countries are benefitting of the ongoing popularity of craft beer. Exporters that meet the changing consumer demand for craft beer have ample opportunities.</p>	<p>Dutch breweries that focus on the local movement fare well but consumers are also looking for foreign craft beer with new tastes.</p>
<p>Sweet Potatoes (HS071420)</p> <p>Total imports: 71.4 million USD</p>	<p>1. United States 68%</p> <p>2. Honduras 8%</p> <p>3. Spain 4%</p> <p>4. Egypt 4%</p>	<p>Except for Egypt, supply from all other supplying countries is up as there continues to be a growing demand for sweet potatoes by the HRI industry. Sweet potato fries are popular (side) dishes in restaurants.</p>	<p>There is hardly any local production although countries in the EU (Spain and Belgium) are starting up production. The Covington variety is not produced in the EU, a popular variety in the EU is Beauregard.</p>
<p>Cranberries (HS200893)</p> <p>Total imports: 76 million USD</p>	<p>1. United States 59%</p> <p>2. Chile 17%</p> <p>3. Canada 16%</p>	<p>Main supplying countries are the United States, Chile and Canada. The market share of the U.S. cranberries is declining as the expense of Chilean cranberries.</p>	<p>There is no local availability. The use of cranberries continues to grow slowly. They are no longer used only in sauces but in a variety of healthy snacks and beverages. The cranberry industry has been able to demonstrate the health benefits of eating cranberries regularly.</p>
<p>Boneless Beef (HS020130)</p> <p>Total imports: 928.6 million USD</p>	<p>1. United States 16%</p> <p>2. Argentina 15%</p> <p>3. Uruguay 13%</p> <p>4 Australia 12%</p> <p>5. Brazil 12%</p>	<p>The United States exports high quality and grain fed beef for the high-end foodservice industry. It is known for its quality, consistency and taste. Suppliers from South America and Australia serve this market as well.</p>	<p>There is not enough Dutch beef of high quality available. Ireland, the United States, Argentina and Brazil profit from this deficit in the Dutch market. Germany predominantly sells great volumes of lower quality and price competitive beef (milk cows) targeting the Dutch meat processing industry.</p>
<p>Wine (HS2204)</p> <p>Total Imports: 1,085.2 million USD</p>	<p>1. France 29%</p> <p>2. Germany 13%</p> <p>3. Italy 11%</p> <p>4. Chile 10%</p> <p>5 Spain 8%</p> <p>13. United States 1%</p>	<p>France, Germany, Italy and Spain have good quality wines at competitive price. They are also neighboring countries or at least close and popular holiday destinations for the Dutch. Wines from Chile are considered good value for money.</p>	<p>Hardly any commercial availability in the Netherlands.</p>
<p>Spirits (HS2208)</p> <p>Total imports:</p>	<p>1. Germany 21%</p> <p>2. the U.K. 19%</p>	<p>All suppliers offer a variety of spirits. The United States is one of the leading suppliers of whiskies on the Dutch wholesale and high-end HRI</p>	<p>There are some strong local spirits available while consumers are also looking for new good quality products from other origins.</p>

628 million USD	3. Belgium 8%	market.
	4. France 8%	
	5. The United States 7%	

Source: Globe Trade Atlas

Section IV. Best Product Prospects

Products that meet the following criteria, in addition to a competitive price, have the best prospect to be sold on the Dutch market:

1. Unique and innovative products (taste, packaging, size);
2. Products not sufficiently available in the Dutch market;

Products Present in the Market Which Have Good Sales Potential

- Nuts: almonds, peanuts, pistachios, walnuts, hazelnuts, pecans;
- Seafood: salmon cod, halibut, scallops, lobster;
- Fresh fruit and vegetables: sweet potatoes, cranberries;
- Sauces and condiments;
- California wines;

Products Not Present in Significant Quantities, but Which Have Good Sales Potential

- Pulses: dried peas, beans, chickpeas and lentils;
- Sweet corn;
- Micro breweries' beers;
- Wines from other States;

Products Not Present Because They Face Significant Barriers

- Specialty products containing GMO derived ingredients;
- Poultry;
- Non-NHTC beef
- Shell fish

Table 17. Table Best Product Prospects for the Netherlands, in million USD, 2016

Product category	Dutch imports	Dutch imports from the United States	2012-2016 Average annual import growth	Key constraint over market development	Market attractiveness for the United States
Boneless Beef	929	149	0-5%	Unfamiliarity of secondary cuts. Competition from South America, Australia/New Zealand and Ireland on price.	Strong demand in high-end HRI industry. Growing awareness at mainstream HRI level and specialty retail outlets.
Craft beer	294	6	5-10%	Labeling, transportation costs and time. Competition from wines. Competition from craft beer exporters from EU countries.	Restaurants are increasingly serving craft beer to complement different meals.

Scallops	95	34	0-5%	Price concern and unawareness among the average Dutch consumer.	Growing interest in scallops, also in Dutch export markets.
Sweet potatoes	71	48	5-10%	Unfamiliarity on how to prepare sweet potatoes and when to use it. The use of Thiabendazole will be banned by the EU as of 2018.	Restaurants are increasingly serving sweet potatoes.
Chickpeas	6	0.2	0-5%	The older and more traditional consumer is unfamiliar with humus or when to use chickpeas.	The younger and more traveled consumer simply loves humus and use chickpeas in soups, salads, and meals.

Source: Global Trade Atlas

Section IV. Post Contact and Further Information

If you have questions or comments regarding this report, or need assistance exporting to the Netherlands, please contact the Office of Agricultural Affairs in The Hague, the Netherlands:

U.S. Department of Agriculture's Foreign Agricultural Service

Office of Agricultural Affairs

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Appendix I. Description of the various foodservice sub-sectors

Full-service restaurants: Full-service restaurants encompass all sit-down establishments where the focus is on food rather than on drink. It is characterized by table service and a relatively higher quality of food offering. It also includes à la carte, all-you-can-eat and sit-down buffets within restaurants. Restaurants at resorts and hotels are in general categorized as full-service restaurants.

Fast food outlets: Fast food outlets are typically distinguished by the following characteristics: a standardized and restricted menu, food for immediate consumption, tight individual portion control on all ingredients and on the finished product, individual packaging of each item, a young and unskilled labor force, and counter service.

Cafés/bars: This sector encompasses all establishments where the focus is on drinking both alcoholic or non-alcoholic beverages and where food is also served. While a wide variety of snacks and full meals are offered, it is more common for customers to only order a drink. Cafés/bars includes bars/pubs, cafés, juice/smoothie bars, and specialist coffee shops.

Self-service cafeterias: They provide no (or limited) service content. Food is presented on counters or available made-to-order through food stalls. The customer chooses the items they want and pays for everything at a separate pay station or check-out.

100% home delivery/takeaway: Fixed units which provide no facilities for consumption on the premises. Food can either be picked up by the consumer, or delivered, often for an additional charge. Common offerings include: pizzas, Chinese, Indian, Mexican, and other local national offerings.

Street stalls/kiosks: Small, mobile foodservice providers characterized by a very limited product offering and by low prices. It includes kiosks and carts located externally or internally e.g. shopping malls. They are often specialized in snacks or a particular dish. This sub-sector also includes food trucks.