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Report Highlights:

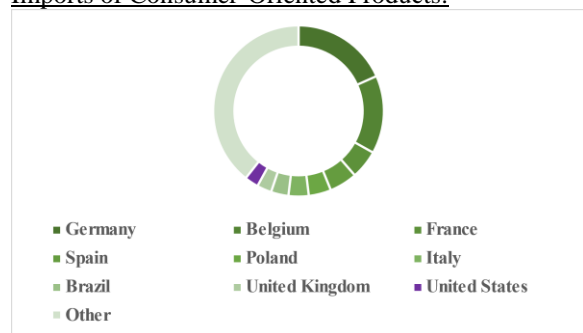
The turnover of the Dutch retail sector was valued at \$54 billion in 2023. The sector is relatively consolidated, with the two largest food retailers controlling almost 60 percent of the market. Due to rising retail prices, consumers visit multiple supermarkets and increasingly choose private label products. At the same time the demand for sustainably produced products, products that are healthy and nutritious, affordable convenience products, and plant-based foods remains strong. The market for shopping online remains small. Food retailers will continue to invest in innovative foodservice concepts in order to attract customers to their physical stores.

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 is 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 2022. 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 the growing 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 is valued at \$54 billion (€50 billion). Due to the increased costs of living, consumers are looking for products on sale and moving from branded products to private label products. Cheaper, further processed variants are gaining popularity as well as discount stores.

Foodservice – HRI Industry:

Last year HRI 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.

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 Processing Industry	\$99
Food Retail	\$54
Food Service	\$17

Top 10 Food Retailers in the Netherlands, Market Share:

1. Albert Heijn	37.1%	6. Deka	2.0%
2. Jumbo	21.1%	7. Hoogvliet	2.0%
3. Lidl	10.6%	8. Spar	1.7%
4. Plus/Coop	9.5%	9. Jan Linders	1.1%
5. Aldi	5.2%	10. Poiesz	1.0%

GDP/Population:

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

Strengths/Weaknesses/Opportunities/Challenges

Strengths:

The Netherlands is the gateway for U.S. products and the home to specialized traders and food processors. There is a long tradition of processing food ingredients.

Opportunities:

Dutch traders and food processors like to work with U.S. suppliers. There is demand for food products with a special claim and sustainable production method.

Weakness:

Transatlantic transportation is costly and takes time. U.S. products are subject to import tariffs and non-tariff trade barriers. Some U.S. products suffer from a negative perception.

Threats:

There is fierce competition on price, quality, uniqueness, and innovation from other EU member states and from third countries that have lower tariff rates.

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

Contact: FAS The Hague, agthe Hague@fas.usda.gov

SECTION I. MARKET SUMMARY

Although the Netherlands is a small country geographically, it is the gateway for U.S. products into the European Union (EU) due to the presence of the Port of Rotterdam, 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 is the third largest exporter of agricultural products in the world, after the United States and Brazil. These exports (\$153 billion in 2023) 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 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#>.

Dutch Food Retail Market

The turnover of the Dutch food retail industry for 2023 is estimated at €50 billion (\$54.3¹ billion). The Dutch food retail is relatively consolidated, with the two largest food retailers Albert Heijn and Jumbo controlling almost 60 percent of the market. Price discount stores, including Aldi, Lidl, and Deko, have a combined market share of almost 20 percent, <https://www.distrifood.nl/173664/marktaandeel-superunie-en-ah-stijgen-jumbo-en-aldi-dalen>.

You can easily find one or two supermarkets in each village or neighborhood in the Netherlands. This makes visiting a supermarket easy and convenient. Dutch consumers visit their supermarket on average almost three times per week and per visit, they spend about half an hour per visit. The Netherlands continues to be a price sensitive market. Many consumers look to save on their grocery shopping due to the rising costs of living. They are always on the look-out for the best price, grocery products on sale, and value for money. TV commercials and advertisements from almost all supermarket chains are often focused on offers, promotions, and special deals.

There are an estimated six thousand food retail outlets in the Netherlands accounting for almost 300,000 jobs. Roughly 75 percent of all food retail outlets are full-service supermarkets, operating on floor space between 500 and 1,500 square meters and located downtown in cities or residential areas. Full-service supermarkets have responded to the need of the Dutch to have these supermarkets close to their homes and focus on selling food stuffs, their non-food items are quite limited. The remaining 25 percent, and growing, mainly includes convenience or 'on the go' stores including *SPAR City*, *Jumbo City*, and *AH To Go*, located near office buildings, schools/universities, train/metro stations, and high traffic areas in the city centers. The Netherlands traditionally has only a few superstores like *Albert Heijn XL* and *Jumbo Foodmarkt* which are often conveniently located in shopping malls or industrial parks.

Market Dynamics

¹ \$1 = €0.92

Private Label

According to the [Private Label Manufacturers Association](#), the market share for private labels was strong at 38 percent (or an estimated €312 billion) across Europe 2023. In the lead were Switzerland, Spain, the Netherlands, the UK, and Portugal -- where almost roughly every second product sold (based on value) is a retailer brand. The Netherlands' market share was estimated at increased to 45 percent. Several retailers in the Dutch market have developed two private labels: one focused on price and the other on enhanced quality. Consumers are discovering the value-for-money that private label brands are offering and that they can be an economical alternative to A-branded products.

The profitability of private label products has fueled retailers' interest to offer more of them (e.g. gluten-free, healthy, and organic) and move into new areas for private labels, such as bakery goods and cosmetics. The largest trade show in the world for the private label industry, the Amsterdam Private Label Manufacturers Association (PLMA) fair, is held annually in Amsterdam. The next edition is scheduled for May 27-28, 2025. Please contact agthehague@usda.gov if you are a U.S. interested party and require more information about the show.

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 €10.8 billion (\$11 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.

Online Shopping

The market for shopping online (as a percentage of the total food retail) showed a decline last year and its share was estimated at about five percent, representing a turnover of €2.1 billion (\$2.3 billion). This decline is mainly caused by the fact that fewer households are doing their shopping online. After the COVID-19 safety measures disappeared, Dutch consumers returned to the physical supermarkets. An estimated 21 percent of households indicated that they sometimes order groceries online. Of that 21 percent, a large part has a low order frequency. The share of heavy users is small. It is especially popular among consumers in the age group of 18-44, driven by saving time, convenience, and money. Consumers are likely to continue to shop online if they have a high-quality online experience and reliable delivery of the purchased goods.

Almost all supermarket chains are active online. Products ordered online can be delivered to your house or can be collected at one of the 1,000 pick-up points in the Netherlands. [Picnic](#) is the only Dutch supermarket that exclusively operates online and its introduction in 2015 further boosted the online sales of groceries in the Netherlands.

Speed Delivery Service



Albert Heijn, Jumbo, and Picnic were the leaders in the on-line shopping market until the outbreak of COVID-19 in 2020 when the speed delivery service (Dutch: flitsbezorgers) was introduced in the market. Speed delivery services are online supermarkets where groceries are delivered within ten to 20 minutes. When placing an order, usually via an app, the order is prepared in a so-called dark store. The delivery person, usually a rider, picks up the order in the dark store and delivers it to the customer. Several players such as [Flink](#),

[Getir](#), Zapp, and [Gorillas](#) (owned by Getir) quickly established themselves in the Netherlands. This sector however is now under pressure. The market has now cooled down sharply due to the uncertain economy and inflation, which means that consumers are less likely to spend money. In addition, costs and delivery times are increasing and the companies also have to deal with the tight labor market, which makes it difficult to find new delivery people. At the moment there is only one party left on the market, Flink, all other parties have left the market. But according to experts, speed delivery service companies need to get back to the core which means fast delivery, with low costs, and within the agreed time to remain profitable. Especially young people who lead busy lives are willing to pay for this form of convenience.

Nutri-Score

On January 1st, 2024, the Dutch government introduced the Nutri-Score logo. This logo should give consumers more information about a food product and be an aid to choose the product with the better composition within a product category. Food companies are not obliged to put the logo on their products. The [Wheel of Five](#) remains the advice for a healthy diet. Nutri-Score does not replace the Wheel of Five. For more on the Nutri-Score label, see [Nutri-Score Labeling Takes Hold in the Netherlands](#).

Deposit Scheme

There are voices in the Netherlands that would like to increase the deposit on large and small plastic bottles to €0.50 in 2025 to entice more consumers to return their empty bottles. The new deposit would be more than triple the current rate for small bottles (€0.15) and double that for large bottles (€0.25). At the moment, an estimated 70 percent of the empty bottles are returned while the goal is to increase this number to 90 percent. The deposit on cans will not increase. The deposit scheme for metal cans (€0.15 cents per can) was implemented in April last year. Not only must a can bear the deposit logo but it must now also include a new European Article Number (EAN). More information can be found in [NL2022-0067: Dutch Delay Implementation of a Deposit Scheme for Cans](#).

Table 1. Advantages and Challenges of the Dutch Food Retail Market

<i>U.S. Supplier Strengths & Market Opportunities</i>	<i>U.S. Supplier Weaknesses and Competitive Threats</i>
The Netherlands is the most important gateway for U.S. products to the European Union (EU) as the buyers and food processing companies are often located there.	The Dutch are price conscious. Transatlantic transportation is costly which adds to the price. Moreover, products from the United States can be subject to import tariffs.
Importers of products targeting supermarkets have had positive experiences working with U.S. suppliers because they are professional, deliver products with a consistent quality, and have a wide variety of innovative products to offer.	Growing demand for single-portion packaged food products. U.S. companies tend to manufacture packaged food in larger packages. Transatlantic transportation takes time which can negatively impact the remaining shelf life of U.S. products.
Strong demand for new products, innovative food concepts, and international cuisine. U.S. producers fabricate products that are innovative, often trend setting, and known for their strong brands.	Some products fabricated by U.S. food producers suffer from a negative perception among Dutch consumers due to misinformation (e.g., local and small-scale is better) or an image issue (e.g., U.S. foodstuffs are unhealthy).
Demand for food products with a special claim and sustainable production methods. U.S. farmers have a good story to tell about their heritage, sustainability, and supply chain.	Beef that is not hormone-free, poultry, and products containing GMO derived ingredients (that are not EU approved) and/or flour bleaching agents cannot be exported to the Netherlands.
Strong demand for functional, fresh, and processed food products that contribute to a healthier lifestyle.	The EU has several Free Trade Agreements that may advantage other 3 rd country competitors, including Canada and Mexico.
	Fierce competition on price, quality, uniqueness, and innovation.

Source: FAS The Hague

SECTION II. ROAD MAP FOR MARKET ENTRY

U.S. exporters seeking to enter the Dutch marketplace have many advantages, as indicated in the above table but might face several challenges as well.

Entry Strategy

Success in introducing your product into the Dutch market will depend mainly on your knowledge of the market and your ability to build relationships with knowledgeable and established importers. An importer knows the market, its dynamics, and the required documentation. Prior to any exporting, it is recommended to invest in researching the Dutch food culture (e.g., consumer trends, purchase patterns, local flavors, prices, requirements, etc.). Also be aware that the competition will be fierce. There are tariff and non-tariff trade barriers that can complicate exporting to the Dutch market. The EU also has several Free Trade Agreements (FTAs) which may advantage other third country competitors. FAS/The Hague offers guidelines on business practices and import regulations and maintains lists of Dutch buyers and stands ready to help you. Please contact our office in The Hague by email at agthehague@usda.gov for additional information.

Market Structure:

Figure 1. Distribution Channel Flow Diagram



Source: FAS/The Hague

A selection of the food products that food retail companies place on their shelves are produced in countries outside the European Union (EU). Retailers do not import these products themselves but work with local, and often specialized, importers who are specialized in international trading and experienced in making sure these foreign products comply with local import requirements and standards. Retailers increasingly have their stores divided into different categories. For each category they will have two or three preferred suppliers who are responsible for supplying the full range of products within that category. This way, the retailer negotiates with just a handful of suppliers for produce, meat products, seafood, groceries, beverages, bakery products, etc. For the international specialty products (covering branded retail ready U.S. products) area within supermarkets, retailers usually work with only one or two specialized importers who are responsible for selecting products and filling those shelves. Dutch department stores (e.g. Bijenkorf) and non-food retail chains (Xenos, HEMA, Normal, and Holland & Barrett) are the only retail outlets that will buy directly from U.S. exporters.

Company Profiles

The Dutch retail industry is rather consolidated and on the purchase side, the industry is even more consolidated since several smaller food retailers have joined forces. The following figures data will give you an overview of the different buying combinations in the Netherlands.

Table 2. Leading Buying Groups in the Netherlands

Purchase Group:	Market Share, percentage:	Name of retail formats:
Albert Heijn Provincialeweg 11, 1506 MA Zaandam www.ah.nl	37.1	Albert Heijn, AH XL, Albert.nl, AH To Go
Superunie Industrieweg 22B, 4153 BW Beesd www.superunie.nl	26.0	Plus, Deen, Coop, Hoogvliet, Spar, Boni-Markten, Boon Beheer, Detailresult Groep, Jan Linders, Poiesz, Sligro, Dirk
Jumbo Groep Holding Rijksweg 15, 5462 CE, Veghel www.jumbo.com	21.1	Jumbo
Lidl Havenstraat 71, 1271 AD Huizen www.lidl.nl	10.6	Lidl
Aldi Holding Pascalweg 21, 4104 BE Culemborg www.aldi.com	5.2	Aldi

Source: <https://www.distrifood.nl/173664/marktaandeelen-superunie-en-ah-stijgen-jumbo-en-aldi-dalen>

SECTION III. COMPETITION

In 2023, total Dutch imports of agricultural and related products were valued at \$109.5 billion. Imports from the United States totaled \$3.9 billion, down by eight percent due to lower imports of soybeans, wood pellets, food preparations, and almonds.

The United States was the 10th largest supplier of consumer-oriented products to the Netherlands, after several EU Member States, Brazil, South Africa, and the UK. Total Dutch imports of consumer-oriented products (\$56.4 billion) were up by seven percent, imports from the United States were valued at \$1.5 billion), dominated by imports of food preparations, tree nuts, beef, distilled spirits, processed vegetables, and processed fruit.

The table below summarizes the competitive situation that U.S. suppliers face in the Dutch food retail market in terms of locally produced goods and imports (and their respective market shares). In addition, the strengths of supplying countries and the advantages and disadvantages of local suppliers are discussed.

Table 3. Netherlands' U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented (U.S. exports), Million USD, 2023

Product Category (product code) Imports in \$ million	Main Suppliers, in percentage		Strengths of Key Supply 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. craft beer.	Strong demand for new flavors, funky labels, and innovative tastes.
Distilled spirits (Product group) Total imports: 1,571 From USA: \$182	1. UK 2. Germany 3. Belgium 4. USA	24 16 12 12	Competition from neighboring countries, dominated by Belgium and Germany.	Strong demand for whiskies with funky labels and innovative tastes.
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.
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.

Processed vegetables (Product group) Total imports: \$2,407 From USA: \$124	1. Belgium 2. Germany 3. Italy 4. Spain 7. USA	29 15 9 6 5	The leading supplying countries are close to the market. Tomato products come from Italy and Spain while Egypt is a competitor for sweetpotatoes.	Demand for good quality sweetpotato and tomato products.
Beef (Product group) Total imports: \$2,602 From USA: \$201	1. Germany 2. Belgium 3. Ireland 6. USA	15 10 9 8	1, 2, and 3 are close to the market.	There is a shortage of good quality, consistent, grain-fed, tasty, and marbled beef.
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, 3, and 4 are close to the market and offer good quality products.	Demand for extra sour and extra spicy candy from the United States, driven by social media
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 new and good quality spices. Exports of U.S. spices including vanilla, anise, and cardamoms are growing.

Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS

A. U.S. Products Present in The Market That Have Good Sales Potential

- Nuts and dried fruits
- Fresh and processed produce
- Non-alcoholic beverages
- (Super) Fruits containing high levels of antioxidants

B. Top Consumer-Oriented Products from the World

- Wine
- Beef
- Food preparations
- Grapes

C. Top Consumer-Oriented Products from the United States

- Food preparations
- Beef
- Almonds
- Distilled Spirits

D. U.S. Products Not Present In Significant Quantities But Which Have Good Sales Potential

- Affordable innovative chocolate, bakery, and confectionary products

E. U.S. Products Not Present Because They Face Significant Barriers

- Poultry (sanitary procedures)
- Processed food with:
 - unapproved GMO ingredients
 - flour bleaching agents (chlorine, bromates, and peroxides)

SECTION V. POST CONTACT AND FURTHER INFORMATION

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Attachments:

No Attachments