USDA United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

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Report Name: Sweet Opportunities in The Netherlands for US Candies and Chocolates

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Report Highlights:

Between 2018 and 2024, U.S. exports of confectionery products have skyrocketed from $4 million to $28 million and exports of chocolate and cocoa product grown from $16 million to a record high $31 million. Over the past few years, the Dutch increased their spending on confectionery and chocolate products, making the Netherlands an interesting market, with its small, but affluent population. Post Brexit, the Netherlands has become the leading trading hub for U.S. confectionery and chocolate products within the European Union (EU). While most of the confectionery and chocolate products on the market are manufactured in Europe, FAS/The Hague sees opportunities for U.S. manufacturers – in particular for products that are popular on social media platforms and those that are extreme in taste, color, size, and product name. Themed confectionery is gaining popularity as well as sugar-free candy, vegan, halal certified, and socially responsible products are appearing on the market.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Brief Market Overview: The turnover of the Dutch confectionery and chocolate market is valued at an estimated €2 billion (US $2.1 billion). About 300 manufacturing companies are active in this sector and employ an estimated 15,000 people. While you can find such manufacturers in each province in the Netherlands, most of them are located near the major cities of Amsterdam, Rotterdam, Utrecht, and The Hague. The majority of Dutch manufacturers are members of the VBZ, the Association of the Dutch Sugar Confectionery, Biscuits, Chocolate, and Savory Snacks Industry. The VBZ is a member of the Association of Chocolate, Biscuit and Confectionery Industries of Europe (COABISCO) and the European Snacks Association (ESA).

Picture 1: VBZ, CAOBISCO, and ESA

It's not all locally manufactured products that are available on the Dutch market – many confectionery and chocolate products are manufactured in nearby Belgium, Germany, and the UK. The presence of the United States, and other non-EU countries on the market, is less dominant in comparison. These non-EU countries primarily serve as secondary suppliers, contributing to a richer diversity of products offered.

According to the latest statistics of the USDA Foreign Agricultural Service's Global Agricultural Trade System, exports of U.S. confectionery products to the Netherlands jumped from $4 million in 2018 to $28 million in 2024. Although U.S. market share is only a mere three percent, the Netherlands is now the fifth largest single export market for U.S. confectionery. Moreover, it is the largest export market within the EU, an export market that is valued at $38 million. Chocolate and cocoa products exports to the Netherlands grew during the same period from $16 million to a record high $31 million. This makes the Netherlands the ninth largest single export market for U.S. chocolate and cocoa products and the largest export market within the EU, an export market valued at $51 million.

Although exact consumption figures of confectionery and chocolate products are not available, FAS/The Hague estimates annual per capita spending to be at around $110, where the spending on chocolate products is slightly higher than the spending on confectionery products. In volume, the picture looks quite different – annually the Dutch eat, on average, 1.8 kg (3.9 lbs.) of confectionery and 4.0 kg (8.9 lbs.) of chocolate products.

It is fair to say that the Netherlands with its 18 million affluent consumers is not only an interesting consumer market, but also the leading trading hub for U.S. confectionery and chocolate products within the EU. Export opportunities for U.S. manufacturers are further discussed in the potential for U.S. exporters section.

Consumer Trends:

Sweet is the new vice: Young people nowadays seem to prefer to 'sin' with sweets rather than with alcohol or tobacco[1]. In this respect, they differ from older generations, who traditionally are more inclined to mark (or soften) moments of exuberance or stress with an alcoholic drink and/or a smoke. Generation Z is consuming things other than booze and tobacco, like sweets. Popular social media platforms, where Generation Z sets the trend, photos and videos of for instance lavish cream puffs, designer donuts, or cruffins filled with pistachio cream do very well. This is partly due to the aesthetic awareness of these young people, who know that a beautiful pastry or candy looks better on a phone screen and social media.

Source: youtube.com

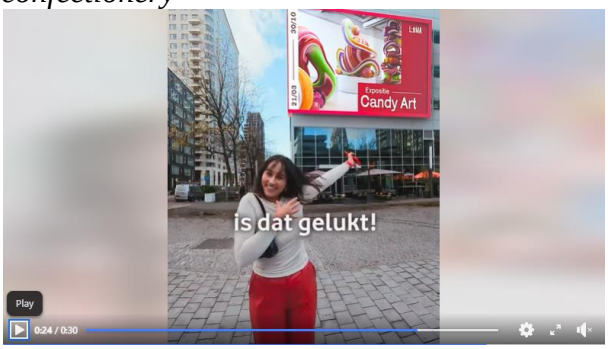
Extreme and crazy candies from abroad are popular: In recent years, new confectionery and chocolate products from overseas markets, including the United States, have been popping up in the Netherlands. Some stores have shelves or pages on the internet, full of foreign candy that excels in its extremeness. Many are extremely sour, extremely spicy, very big in size, or have bold colors and extreme names like *Brainlickers*, *Warheads*, and *Toxic Waste*. The fact that unusual, foreign candy is popular is not new, but the enormous trend sensitivity of it is. If something is a trend on popular social media platforms, like TikTok and Instagram, products become all of a sudden very popular. Staff at, for example Jamin stores, are well informed about which products are popular on social media. Young customers come to the store for specific items that they have seen online. Several online stores have a special dedicated page on confectionery products that are popular on social media.

FOMO: Consumers in the middle- and upper-income classes, and in particular Generation Z or Zoomers, are the primary consumers of confectionery and chocolate from the United States as they enjoy indulging these products as a (after-meal) treat, something you like to share with peers, or a popular gift choice. Though consumers are mindful of paying a somewhat higher price, they prioritize unique products, new flavors, and innovative packaging. Fueled by a fear of missing out (FOMO), there is great willingness among customers to pay for this.

Themed confectionery is hot: Events like Valentine's Day, Easter, Mother's Day, Halloween, and Christmas, determine temporary fillings of the candy shelves and are subject to trends[2]. There has been a huge growth spurt, especially for Halloween candies. All distribution outlets, both online and offline, use themes to boost sales of confectionery and chocolate products.

[1] Generatie Zoetigheid kiest niet voor alcohol maar voor snoep - SpiritsNL
[2] https://www.levensmiddelenkrant.nl/interview--trends-in-zoetwaren-in-de-supermarkt

Picture 2: Vodafone TV Commercial featuring confectionery



Source: Vodafone

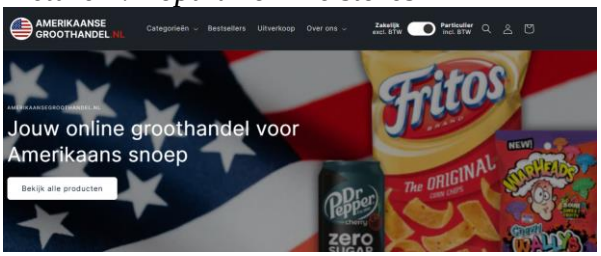
Picture 3: Music video using candy

Confectionery imagery is also used in TV commercials across industries and often appears in campaigns that are aimed at attracting specific audiences or creating a certain atmosphere. Movies, TV shows, and music videos use candy in their marketing to evoke a sense of fun or youthful energy.
Source: https://www.youtube.com/watch?v=KPSRg7GsTY8

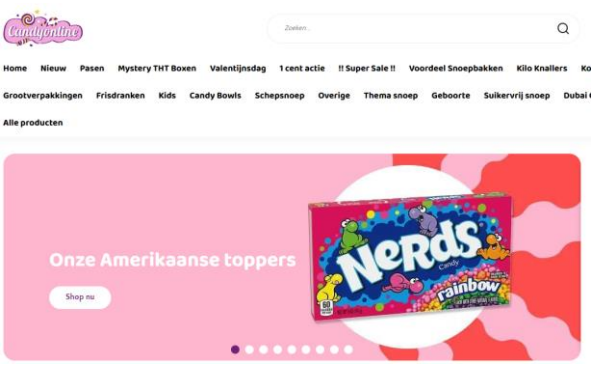
Special certification and health are gaining popularity: The health trend is also visible in the offerings of confectionery and chocolate products, as the assortment of sugar-free candy is growing. Dutch online store www.food2smile.nl focuses primarily on selling sugar-free, gluten-free, and vegan confectionery products, popular with Generation Z. This generation also buys more consciously and socially responsible anyway, further supporting the success of Tony's Chocolonely.

Distribution Channels: Roughly three quarters of all confectionery and chocolate sales take place through traditional full-service supermarkets, such as Albert Heijn, Jumbo, PLUS, Hoogvliet, Aldi, and Lidl (for more information see Dutch Food Retail Market Report 2024). The remaining sales take place through candy specialty stores (including Jamin), non-food retail outlets (like Kruidvat, Xenos, Action, and Normal), via on-line platforms (including candyxl.com and others, see below), and independent bodega style stores in larger cities.

Picture 4: Popular online stores

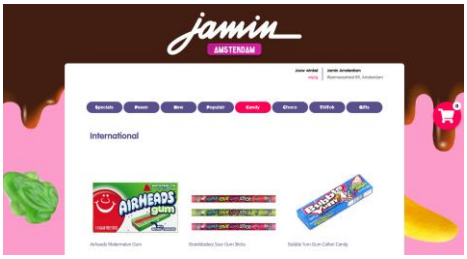


www.amerikaansegroothandel.nl



www.candyonline.nl

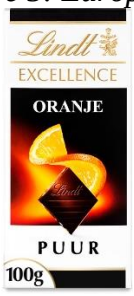
www.snoepdiscounter.nl



www.jamin.nl

About 30 percent of all confectionery and chocolate products offered at full-service supermarkets are sold under their own private label. The non-food retail chain Flying Tiger sells all their confectionery products under private label. The remaining range is represented by brands from the Netherlands and abroad. A few well-known brands are Haribo, Verkade, Red Band, Venco, Klene, Tony Chocolonely, Look-O-Look, Katja, and Lindt.

Picture 5: European brands available on the market



A smaller part of the supply comes from global players such as Mondelez, General Mills, Mars, Hersey Company, Nestlé, and Kraft.

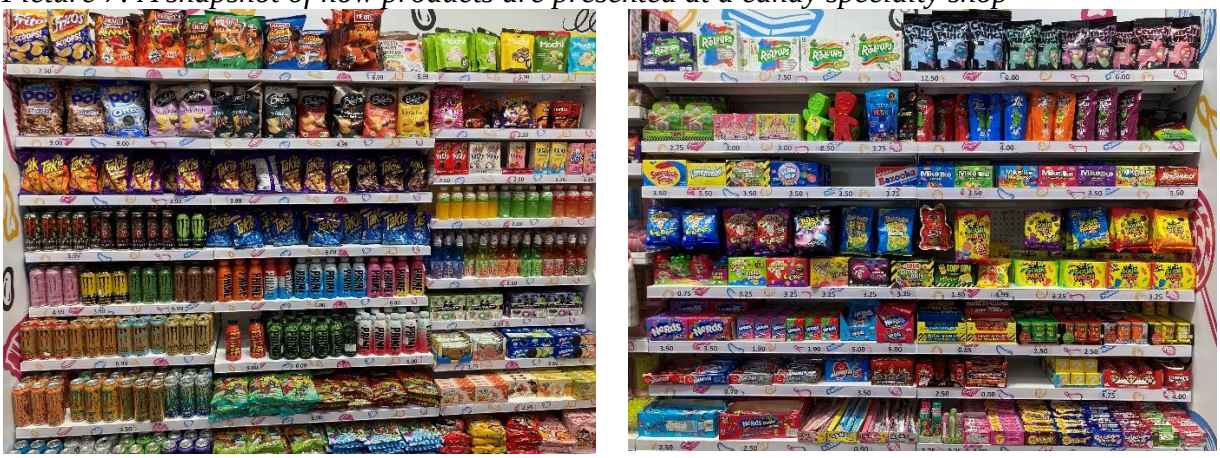
Picture 6: USA brands available on the market

Source: FAS/The Hague

Non-food retailers, online platforms, candy specialty stores, and independent stores offer a much greater range of branded confectionery and chocolate products from companies that operate worldwide and

branded products from the United States. The forementioned distributors of confectionery and chocolate products work closely with specialized importers (of which many are based in the Netherlands) who purchase these branded products and put together an attractive and rich product offer for their customers. It is these distributors that offer new and innovative products first.

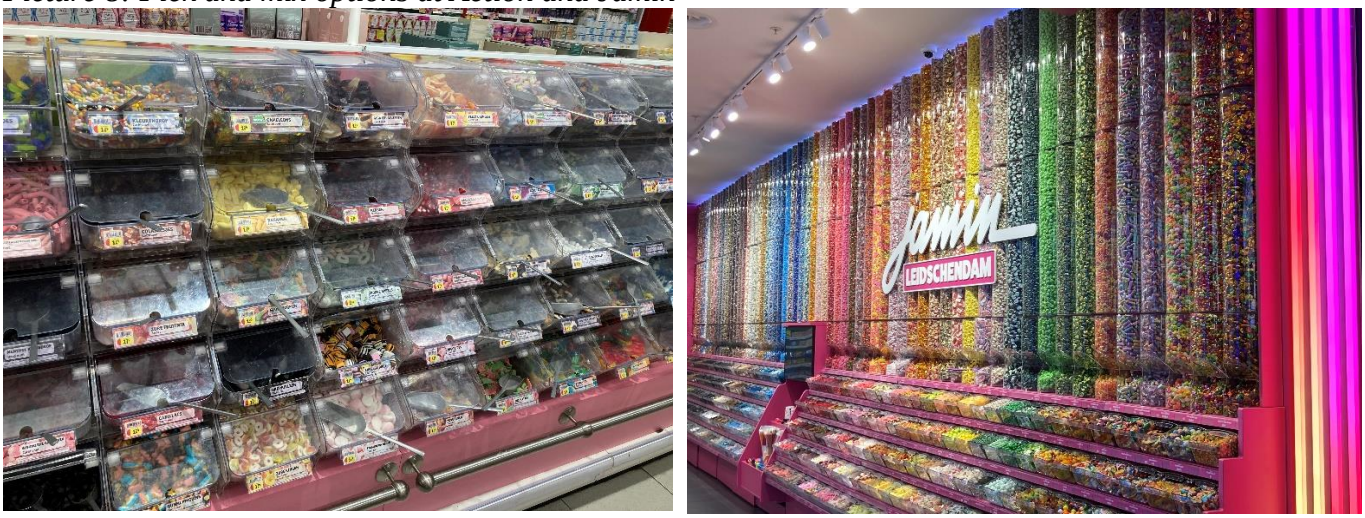
Picture 7: A snapshot of how products are presented at a candy specialty shop



Source: FAS/The Hague

Candy specialty stores in particular offer products that are unique in taste, shape, and packaging, albeit at a higher price. Some stores offer in addition 'pick and mix' – giving the customer the option to choose from a wide range of products and to its own liking.

Picture 8: Pick and mix options at Action and Jamin



Source: FAS/The Hague

Local Players and Potential for U.S. Exporters: Despite the strong presence of locally operating manufacturers of confectionery and chocolate, through either branded or private labeled products, there is potential for growth for U.S. manufactures, especially at non-food retailers, candy specialty stores, online-platforms, and independent stores. This is driven by various factors including:

- U.S. confectionery often has much more intense and pronounced flavor than the average Dutch treat and tickles the taste buds in a whole new way.

- With their bright colors, eye-catching shapes, and creative packaging, these candies are especially appealing to younger consumers. It makes collecting and sharing it extra fun.

- Social media platforms play a big role in popularity. When influencers and peers are excited about a certain product, consumers want to try it themselves as well.

- These candies have a certain exotic appeal for many Dutch consumers. They offer a window into the American candy world, which is different from what consumers are used to in the Netherlands.

Industry Themes: Food and health are topics are on the mind of many food companies, including manufacturers of confectionery and chocolate products. Their products need to comply to Dutch food laws and food safety requirements, while also taking into consideration responsible product promotion and the consumers' balanced lifestyle. The 2018 Dutch National Prevention Agreement is one of the Government's initiatives that aims at improving citizens health through the prevention of disease by addressing obesity and poor nutrition.

While manufacturers of confectionery and chocolate products are usually not associated with health and nutrition, according to the VBZ, the industry wants consumers to continue to enjoy confectionery and chocolate products and make an active contribution to reducing obesity. They do this by reducing the levels of sugar, salt and fat in products, making portions smaller and providing a portion indication on the packaging. Several Dutch manufacturers have joined the awareness campaign: 'feel free to enjoy, but consciously.'

Picture 9: Awareness campaign in the Netherlands

Source: www.genietgerust.nl

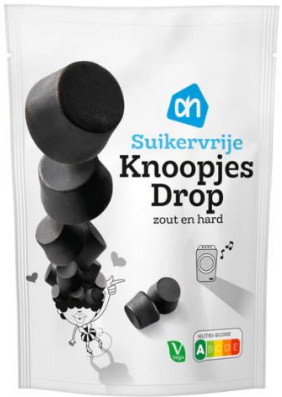
Picture 10: Product with a sugar free claim

Source: FAS/The Hague

Another initiative is the 2022 Dutch National Approach to Product Improvement. Through this voluntary initiative, manufacturers are also asked to reduce saturated fat, sugar, and added salt levels in their food products – aiding consumers in moderating their intake of these compounds. According to the VBZ, several manufacturers have improved their recipes towards lower-calorie products. As a result, there are several products that have sugar free (in Dutch *suikervrij*) on its packaging.

On January 1, 2024, the Dutch government endorsed Nutri-Score, a voluntary front of pack nutrition label, that is now seen on all private label confectionery products. Manufacturers hope that portion sizes will also be taken into account in the further development of the Nutri-Score logo. On its website, the VBZ states that portioning has the greatest effect in achieving calorie reduction. Manufacturers that are a member of VBZ have also committed themselves to the agreements of the Advertising Code for Food Products and do not advertise to children under the age of 13, nor work with child icons, for instance cartoon characters.

Picture 11: Private labeled products using Nutri-Score



Source: www.dutchshopper.com

Import Regulations: Confectionery and chocolate products from the United States must meet Dutch requirements before these products can be sold on the Dutch market. The Netherlands' Food and Agricultural Import Regulations and Standards (FAIRS) report lists the Dutch import regulations and standards that are not harmonized within the EU or where the Netherlands varies with the EU.

Product label: The standard U.S. label on food products fails to comply with local labeling requirements. For one, information on the labels must be in Dutch, the Netherlands' official language. Stick-on printed labels are permitted.

GMO: The EU has approved some genetically modified organism (GMO) varieties that can be used in food products, including confectionery. The EU register of authorized GMOs can be consulted on the European Commission's website at https://food.ec.europa.eu/plants/genetically-modified-organisms/gmo-register_en. These products need to be labeled, according to EU Regulation 1829/2003. However, several supermarkets in the Netherlands have voiced that they will not sell products that contain EU approved GMO varieties. If the product does not contain GMOs, manufacturers can mention on their product label that a product is "produced without using genetically engineered technology" (in Dutch: "bereid zonder gentechniek").

Additives (including colors and sweeteners): Only additives included in the EU's positive list are authorized under specific conditions. An important difference from U.S. legislation is that the EU does not allow the use of flour beaching agents chlorine, bromates, and peroxides. In the EU there is a mandatory labeling requirement for Quinoline Yellow (E104), Sunset Yellow (E110), Ponceau 4R (E124), Tartrazine (E102), Azorubine/Carmoisine (E122), and Allura Red AC (E129). Foods

containing these colors must be labeled "may have an adverse effect on activity and attention in children". Commission Regulation 232/2012 lowered the limits for food colors Quinoline Yellow (E104), Sunset Yellow (E110) and Ponceau 4R (E124). Food color Red 2G (E 128) was removed from the EU's positive list.

Import Duties: In addition to shipping costs and time, confectionery and chocolate products from the United States, face strong competition on the Dutch market due to a tariff disadvantage compared to products manufactured within the EU. The EU uses the Combined Nomenclature (CN) for the customs classification of goods. The EU's on-line "TARIC" customs database can be consulted to look up commodity codes and relevant import duties. Information about the Netherlands' customs authority (in Dutch called Douane) can be found at https://www.aboutnetherlandscustoms.nl/. Business operators can obtain Binding Tariff Information (BTI) from the Netherlands' customs authority in order to get the proper product classification and relevant import duty, https://www.belastingdienst.nl/wps/wcm/connect/nl/douane_voor_bedrijven/douane_voor_bedrijven

Sugar Tax: On January 1, 2024, the Netherlands raised the consumption tax on non-alcoholic beverages from €0.09 (or $0.10) per liter to €0.26 (or $0.29) per liter. One of the underlying goals of a sugar tax is to stimulate producers to reformulate beverages, as to lower their sugar content. The consumption tax is paid upon the beverages leaving a Dutch production facility or at the time of import into the Netherlands. Bulk-deliveries of beverages, water, dairy, and soy drinks are exempted from the tax (up until the time they are processed into a product for the end user). However, post-mix beverage deliveries are not exempt from the tax. The product groups impacted are lemonade, fruit and vegetable juices, beer with an alcohol content of up to 0.5 percent, and other beverages with an alcohol content of up to 1.2 percent. Bottled water will not be subject to the consumption tax anymore from January 1, 2024. Introducing a sugar tax on food items does not seem to be a topic of conversation for the time being for the Dutch government.

Deforestation-free supply chains - the EU Deforestation Regulation (EUDR): Regulation 2023/1115 establishes rules for a list of commodities, including cocoa, identified as the main drivers of agricultural expansion leading to deforestation and forest degradation. U.S. manufacturers of chocolate products depend on cocoa imports, and these manufacturers will have to make sure their suppliers are EUDR compliant through due diligence procedures. U.S. manufacturers who import cocoa and then export chocolate products to the EU will need to require the information as laid down in article 9 and Annex 1 of the Regulation from their suppliers. The Regulation is based on B2B information sharing meaning that the U.S. government does not certify a product as EUDR compliant. The enforcement of the Regulation was postponed to December 30, 2025. Addition information, including FAQs, can be found on the Commission's website, https://green-business.ec.europa.eu/deforestation-regulation-implementation_en and the website of the U.S. Mission to the EU, https://usda-eu.org/sustainability/deforestation-free-supply-chains/. The EU Deforestation Regulation -- Revised Implementation Timeline for 2025 is the latest report by the U.S. Mission to the EU.

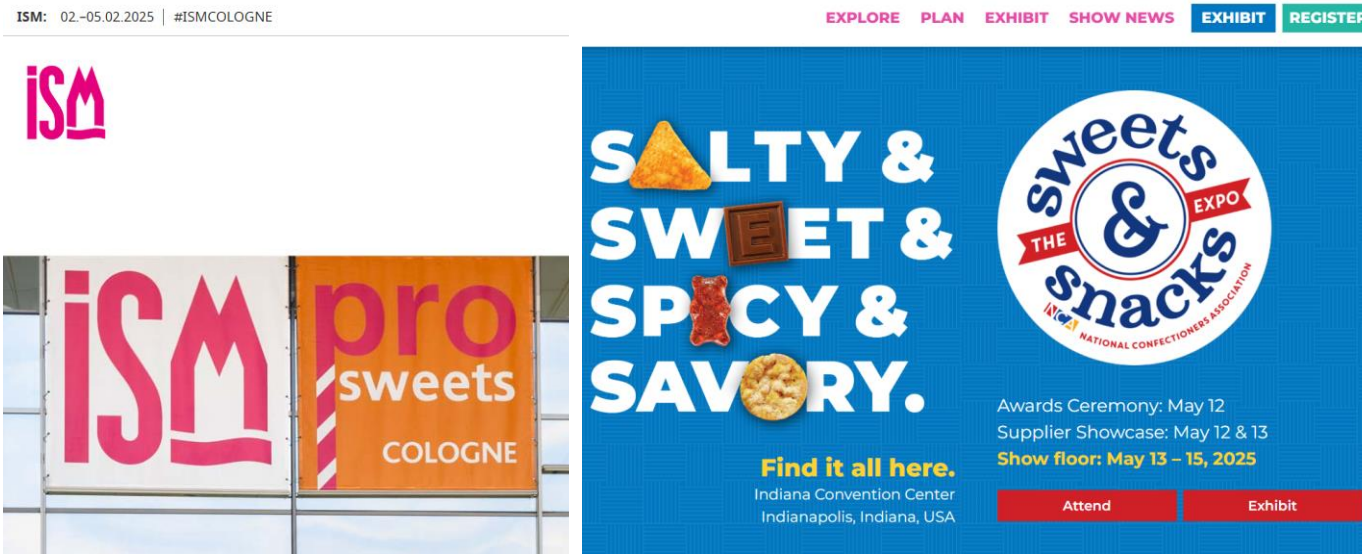
New import requirements for products containing honey: As of November 29, 2024, all apiculture products entering the EU must come from EU-approved establishments. Products containing apiculture ingredients must also source those ingredients from EU-approved establishments. Additional information can be found in the following report.

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

After ascertaining whether there is a market for your product, it helps to understand the supply chain and the role of the various players have. U.S. confectionery and chocolate products are sourced through specialized Dutch importers – as distributors don't want to deal with exchange rate and/or price volatility, documentation, and other import requirements.

There are several options on how to enter the Dutch market. For example, consider exhibiting at a specialized trade show in the United States, like the Sweets and Snacks Expo. Dutch buyers regularly travel to the United States to see new products and make new contacts. U.S. manufacturers should however also consider visiting or even exhibiting at Europe's largest sweets and snacks trade show, the ISM Süßwarenmesse which takes place annually in Cologne, Germany, as well as larger but more general food and beverages trade shows including SIAL in Paris, France and Anuga in Cologne, Germany. Dutch buyers of confectionery and chocolate products visit these shows every time they occur. Trade shows can serve as a springboard into the market, helping companies establish new trade contacts and gauge product interests.

Picture 12: ISM in Europe and Sweets and Snacks Expo in the United States



U.S. exporters can also contact their respective U.S. State Regional Trade Groups (SRTG), their commodity cooperator group and/or their state Department of Agriculture to obtain additional market entry support. Additionally, U.S. cooperators (SRTGs and commodity groups) regularly organize (Reverse) Trade Missions, often arranged around trade shows or other events. These missions have proven to be an excellent platform for U.S. manufacturers to meet and do business with foreign buyers. In particular, the National Confectioners Association (NCA) has a wealth of information and experience in helping U.S. companies expand their business overseas. NCA is the show organizer of the Sweets and Snacks Expo.

Finally, please consider contacting USDA's FAS office in The Hague, the Netherlands for assistance exporting to the Netherlands, as well as the countries in the Nordic region. Other market assistance reports can be found online at: https://gain.fas.usda.gov/#/search or at https://fas.usda.gov/regions/netherlands.

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Attachments:

No Attachments.