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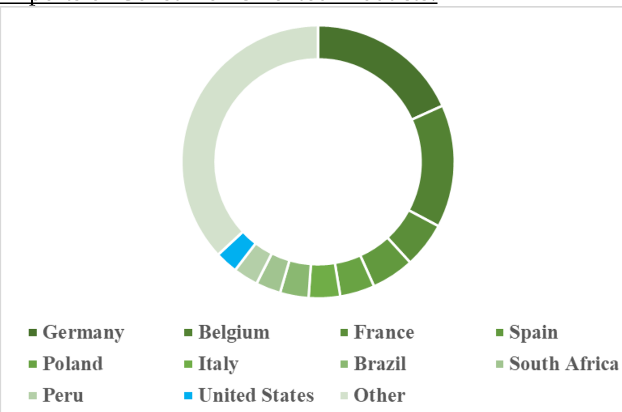
Report Highlights:

The exporter guide provides an economic and market overview, as well as demographic trends and practical tips to U.S. exporters on how to conduct business in the Netherlands. The report additionally describes three market sectors (food retail, food service, and food processing), the best market entry strategy, and the best high-value product prospects, and focuses exclusively on consumer-oriented products. Additional reports referenced herein can be found at the following website: https://gain.fas.usda.gov/#/search.

Market Fact Sheet: The Netherlands

Executive Summary:
Although the Netherlands is a small country geographically, it is the gateway for U.S. ingredients into the European Union (EU). It is also the largest importing country within the EU and continues to be the second largest exporter of agricultural products in the world.

Imports of Consumer-Oriented Products:



Source: Trade Data Monitor

Food Processing Industry:
Over 9,155 food companies in the Netherlands generated net sales of €114 billion ($133 billion) in 2023. The industry has been a steady supplier of jobs in the Netherlands (163,000) 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 6,130 stores. The sector's turnover for 2024 was estimated at €50 billion ($58 billion) – 80 percent being sales of food products. Consumers are looking for products on sale, and moving from branded products to private labeled products. Cheaper, further processed variants and discount stores are gaining popularity. Interest in on-line shopping continues to grow.

Foodservice – HRI Industry:
In 2024, the industry's turnover was up by three percent and valued at €15.7 billion ($18.3 billion), mainly due to inflation. High costs of living continue to reduce the frequency with which the Dutch visit foodservice establishments. Food retailers continue to invest in the delivery of ready meals and meal kits and expanding the number of convenience stores.

Quick Facts CY2024
Imports of Consumer-Oriented Products, total:
$60.6 billion

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

1. Cocoa beans	6. Wine
2. Food preparations	7. Meat products
3. Fats and oils	8. Grapes
4. Avocados	9. Bananas
5. Baked products	10. Cheese

Food Industry by Channels 2024, in $ billion:

Retail Food Industry	$58
Food Service-HRI	$18
Food Processing	$133
Food and Agriculture Exports	$159

Top 10 Food Retailers in the Netherlands, Market Share:

1. Albert Heijn	37.7%	6. Dirk/Deka	5.1%
2. Jumbo	20.3%	7. Hoogvliet	2.0%
3. Lidl	10.7%	8. Spar	1.8%
4. Plus/Coop	9.3%	9. Jan Linders	1.1%
5. Aldi	5.2%	10. Poiesz	1.0%

GDP/Population:
Population: 18.0 million
GDP: $1,256 billion (€1,080 billion)
GDP per capita: $69,767 (€60,000)

Strengths/Weaknesses/Opportunities/Challenges

Strengths:	Weakness:
The Netherlands is a gateway to the EU for U.S. ingredients and the home to specialized traders and food processing companies. There is a long tradition of processing food ingredients.	Transatlantic transportation is costly and takes time. U.S. products are subject to import tariffs and non-tariff trade barriers.
Opportunities:	**Threats:**
Dutch traders and food processors have a good track record working with U.S. suppliers. There is a strong demand for a wide variety of food ingredients.	There is fierce competition on price, quality, uniqueness, and innovation from other EU member states and from third countries that have negotiated lower tariff rates.

Data and Information Sources: Trade Data Monitor, industry experts, company websites
Contact: FAS The Hague, agthehague@fas.usda.gov

SECTION I. MARKET OVERVIEW

Population and Key Demographic Trends

In 2024, the Dutch population rose to 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 previous generations.

About half of the Dutch population currently lives in cities and the overall trend of moving to urban areas is expected to continue. Between 2024 and 2034, it is expected that three-quarters of all children will be born in cities. The population of Amsterdam alone will grow by 150,000 and is expected to have more than 1 million inhabitants in 2036. Currently the mean population density is 517 inhabitants per square kilometer, making the Netherlands the second most densely populated country in the European Union, after Malta.

In 2024, there were 8.4 million households, of which 3.3 million were single-person households. This means that 19 percent of all residents have a single-person household. On average, 2.11 people live in a Dutch household, while sixty years ago the average household size was 3.49. Single-person households now account for almost 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 Western Europe, and in terms of size, it is slightly bigger than the state of Maryland and smaller than the state of West Virginia. It borders with Germany to the east, Belgium to the south, and the North Sea to the northwest. The largest cities are Amsterdam, The Hague, Rotterdam and Utrecht, together referred to as the Randstad. Amsterdam is the country's capital, while The Hague is home to the Dutch seat of the government and parliament. The Netherlands' name literally means "low countries", influenced by its low land and flat geography, with only half of its land exceeding one meter above sea level.

Dutch Traders Are Key in Distributing U.S. Exports Throughout the EU

The Netherlands is the largest importing country within the European Union (EU) and the second largest exporter of agricultural products in the world, after the United States and before Brazil, Germany, and China. These exports include agricultural products produced in the Netherlands and imported products that are re-exported, often after sorting, repacking, or further processing. The port of Rotterdam and Amsterdam are Europe's largest and fourth largest ports, respectively, and Amsterdam Schiphol is Europe's fourth largest airport. Two of Europe's largest rivers, the Maas and the Rive, run via the Netherlands to the North Sea. Moreover, the Netherlands has an excellent rail, river, and road infrastructure.

Overall Business Climate
On February 26, the Netherlands Bureau for Economic Policy Analysis (CBP) published its latest projections in the Central Economic Plan 2025 (CEP). The Dutch economy is set for moderate growth in the years ahead. Geopolitical unrest is currently causing additional uncertainty, which is only reflected to a limited extent in the projections. The medium-term economic outlook is more favorable than previously expected, due to a higher labor force participation rate and lower unemployment. Public finances consequently also improve, although the deficit continues to increase in the medium term. This is according to the latest projections by the CPB, https://www.cpb.nl/en/projections-february-2025-cep-2025. More detailed information about the Dutch consumer market and consumer behavior can be found Sections II and IV.

Over the past two years, Dutch politics have undergone major shifts. After the fall of Mark Rutte's government coalition in 2023, elections brought a historic win for Geert Wilders' far-right party, PVV. A right-wing coalition took office in 2024 under technocratic Prime Minister Dick Schoof. Though the coalition collapsed in June 2025 over asylum policy disagreements, the caretaker government remains stable and functional, with new elections scheduled for October 2025.

Table 1. Advantages and Challenges U.S. Exporters Face in the Netherlands

Advantages (U.S. supplier strengths and market opportunities)	**Challenges (U.S. supplier weaknesses and competitive threats)**
Local traders and food processors prefer to work with U.S. suppliers because they are professional and deliver products with a consistent, high quality. U.S. companies also have a great variety of products to offer.	Growing demand for single portion packaged food products. U.S. companies tend to manufacture packaged food in larger packages. A standard U.S. label on food products fails to comply with EU labeling requirements – products need to be relabeled.
Strong demand for food products with a sustainable production method. U.S. farmers have a good story to tell about land stewardship, their supply chain (farm to table), and their State/regional heritage (provenance).	Transatlantic transportation takes time which is at the expense of the shelf life. It is also costly and products from the United States are subject to import tariffs. Suppliers from other EU member states have a competitive advantage on tariffs and non-tariff trade barriers.
Growing demand for comfort food, innovative food concepts, affordable convenience, and international cuisine. Many U.S. products are innovative, often trend setting, and known for their strong brands.	Some U.S. food products suffer from a negative perception among Dutch consumers due to misinformation or an image issue (e.g., U.S. foodstuffs are considered unhealthy).
The Netherlands is the most important gateway for U.S. products to the European Union.	U.S. beef from hormone-treated cattle, poultry, flour bleaching agents, certain colors, allulose, and products containing GMO derived ingredients that are not EU approved cannot be exported to the Netherlands.
Growing demand for nutritious, fresh, and food products for a healthier lifestyle.	The EU has several Free Trade Agreements that may advantage other 3rd country

	competitors, including Canada and Mexico. The EU is currently in negotiations with MERCOSUR.
	Fierce competition on price, quality, uniqueness, and innovation.

Source: FAS/The Hague

SECTION II. EXPORTER BUSINESS TIPS

Market Research

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

Local Business Customs and Trends

Most Dutch entrepreneurs speak and write in English and have a high level of education. They can be informal, straightforward, open-minded, and experienced in traveling internationally. During a first introduction, many may talk about their last visit to the United States, or about another occasion that they spent time in the USA. The Dutch also engage in small talk that enables them to get to know the other person in an informal way. They tend to communicate on a 'first name' basis. It is widely accepted to communicate via email and increasingly via WhatsApp. The Dutch expect to receive a response quickly, or at least within 24 hours.

The Dutch are business-minded and like to be well informed about the company they are about to do business with, the product in question, price, and future business opportunities. They can be quick discission makers. Doing business does not require 'wining & dining'. The Dutch preferably want to get the job done during regular business hours since a healthy 'work-life' balance is important to them.

Food retailers, foodservice companies, and wholesalers normally do not buy directly from suppliers from third (non-EU) markets, such as the United States. Instead, they work with dedicated and highly specialized local distributors. These distributors are experienced in doing business with overseas producers, are informed about what documents need to accompany the goods from the United States, and know which products or ingredients are not approved to import into the EU. They look for long-term partnerships rather than a one-off business transaction.

General Consumer Tastes and Trends

General consumer trends that affect the Dutch food retail and foodservice market can be found in the reports the Netherlands Food Retail Market and the Netherlands Foodservice Market.

Trade Shows

Please find below an overview of the trade shows that annually take place in the Netherlands.

Table 2. Trade Shows in the Netherlands

Name:	Target Audience:	Dates:	Website:
BBB & Folie Culinaire	Local high-end gastronomy	October 6-8, 2025	https://www.bbbmaastricht.nl/folie-culinaire/

WBWE (World Bulk Wine Expo)	International buyers of (private label) bulk wine	November 24-25, 2025	https://worldbulkwine.com/newfront
Horecava	Foodservice HRI industry buyers	January 12-15, 2026	http://horecava.nl/
PLMA (Private Labeling Manufacturing Association)	International buyers of private label products	May 19-20, 2026	https://www.plmainternational.com/

Source: FAS/The Hague

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS AND IMPORT PROCEDURES

Information about customs clearance, required documentation for U.S. products imported into the Netherlands, labeling requirements, tariff information and FTAs, and trademarks and patent market research can be found in the Food and Agricultural Import Regulations and Standards (FAIRS) Country and Certificate Reports which can be downloaded from the following website: https://gain.fas.usda.gov/#/search.

Most Dutch food legislation is harmonized at the EU level. Where EU regulatory harmonization is not yet complete or absent, imported products must meet existing Dutch requirements. U.S. exporters should be aware that national measures still exist for the choice of language, use of stickers, samples, special use foods, vegetarian and vegan products, packaging waste management, food contact materials, enzymes, processing aids, 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 2023. Total consumer spending on foods certified as sustainable grew by 14 percent in 2023 to $14.4 billion (€12.6 billion). The share of sustainable food compared to total spending on food slightly increased from 18 to 19 percent in 2023.

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 (€4.3 billion) followed by product with the 'Rainforest Alliance' quality mark (€3.1 billion) and products labeled organic (€2.0 billion). 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. Spending on sustainable certified products in 2024 could be under pressure as a result of high overall costs of living and declining consumer trust in the economy 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
The Dutch are price conscious and are visiting multiple supermarkets in their search for the lowest price. Consumers are also choosing private label products more often instead of A-brands and are exchanging products between categories. For example, this means less meat (or smaller portions), cheaper variants (such as minced meat or chicken), or more vegetables instead of meat. The number of people going to food banks continues to grow and food banks support 45,000 households in the Netherlands, which is led by young people and families. The increase in demand for food banks is due to rising costs of living, consumer debt, and low incomes. While sustainability, authenticity, health, and nutrition are important purchasing factors for many Dutch consumers, price has now become the overall most important factor.

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

Table 3. Best Consumer-Oriented Product Prospects

Commodity (HS code)	**Imports, million USD, 2024**	**Imports from U.S., million USD, 2024 (U.S. market share)**	**Estimated average annual import growth**
Wine (HS220421)	1,315	32 (2 %)	20 %
Liqueurs (HS220870)	218	34 (16 %)	100 %
Sugar confectionary (HS170490)	714	22 (3 %)	45 %
Pistachios (HS 080251)	70	51 (73 %)	9 %
Chocolate products (product group)	4,589	68 (1 %)	25 %

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 Netherlands Food Processing Ingredients Market, the Netherlands Food Retail Market, and the Netherlands Foodservice Market.

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

Table 4. Netherlands' Imports of Consumer Oriented and Seafood Products, 2024 figures

Product Category (Product Code) Imports in Millions of US$	Main Suppliers, By Percentage		Strengths of Key Supplier Countries	Advantages and Disadvantages of Local Suppliers
Craft beer (HS2203) Total imports: $669 From USA: $4	1. Belgium 2. Germany 3. Poland 4. France 13. USA	56 12 7 6 1	Nearby production of quality and innovative craft beer using U.S. hops, competing with U.S. product.	Strong demand for new flavors, funky labels, and innovative tastes among connoisseurs.
Sweetpotato (HS071420) Total imports: $175 From USA: $63	1. Egypt 2. USA	38 36	Competition from Egypt, China, Honduras, Brazil, and South Africa.	The availability of fresh and processed sweetpotato products continues to grow. Strong demand for variety and quality.
Distilled spirits (Product group) Total imports: $1,608 From USA: $153	1. U.K. 2. Germany 3. Belgium 4. USA	19 18 16 10	Competition from good quality products produced in neighboring counties.	Strong demand for whiskies with funky labels, innovative tastes, and that have a story to tell.
Seafood products (Product group) Total imports: $5,773 From USA: $112	1. Iceland 2. Norway 3. Germany 4. Belgium 5. Denmark 14. USA	16 10 7 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 dominates the supply of Alaska Pollack, scallops, and wild salmon. For shrimp & prawns, cod, and lobster, the USA competes with other non-EU exporters.	The Netherlands is an international trader in and processor of seafood products, serving foodservice markets and retail throughout Europe. The Dutch increasingly depend on imports for Alaska Pollack, scallops, wild salmon, shrimp & prawns, sole, plaice, cod, and lobster.

Beef and beef products (Product group) Total imports: $2,776 From USA: $183	1. Germany 2. Belgium 3. Ireland 6. USA	16 11 9 7	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: $824 From USA: $21	1. Germany 2. Belgium 3. Italy 4. Thailand 11. USA	19 16 10 8 3	Good quality and taste sauces are locally available and benefit from its proximity and being in the EU market.	Demand for good quality, tasty, and unique, yet affordable condiments and sauces.
Walnuts (HS080232) Total imports: $118 From USA: $59	1. USA 2. Chile 3. Germany	50 18 11	Competition from Chile and a lesser extend China.	Strong demand from the bakery and snack industry. Walnuts benefit from their healthy reputation.
Food preparations (HS210690) Total Imports: $2,389 From USA: $329	1. Germany 2. Belgium 3. USA 4. U.K. 5. France	17 15 14 8 5	Due to proximity, neighboring countries are the leading suppliers of flavored or colored sugar, isoglucose, lactose, and glucose and maltodextrine syrups.	Food preparations are produced and used throughout the EU.
Odoriferous substances (HS330210) Total Imports: $722 From USA: $71	1. Ireland 2. Germany 3. USA 4. U.K. 5. France	54 16 10 5 4	Odoriferous Substances are compounds (natural and synthetic) with odors used in the manufacture of various non-food and food products and are locally available.	U.S. suppliers are often at a price disadvantage compared to EU suppliers mainly due to shipping costs and time.
Peptones and derivatives (HS350400) Total Imports: $569 From USA: $85	1. Germany 2. USA 3. France 4. Belgium 5. China	15 15 14 11 8	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 shipping costs and time.

Sugar and sugar confectionary (HS17) Total imports: $1,701 From USA: $45	1. Belgium 2. Germany 3. France 8. USA	28 24 12 3	First four countries are close to the market and offer good quality products while the USA produces innovative candy products in color and taste.	Demand for extra sour and spicy innovative candy with bold colors in fun packaging from the United States, driven by social media.

Source: Trade Data Monitor

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Agricultural & Food Import Statistics
Dutch import statistics of U.S. agricultural and food products can be downloaded from the following website https://apps.fas.usda.gov/gats/default.aspx. Please make the following selection: Product Type: exports; Market Year: calendar year; Report Type: year-to-date; Country: Netherlands; Product: agricultural & related products and Download: word.

Table 4 in this report provides an overview of the best high value consumer-oriented products prospects.

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

If you are a U.S. interested party with questions or comments regarding this report, need assistance exporting to the Netherlands, or are seeking information on potential foreign buyers of consumer-oriented products and seafood products, please contact the Foreign Agricultural Service:

USDA Foreign Agricultural Service (FAS)
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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