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Report Highlights:

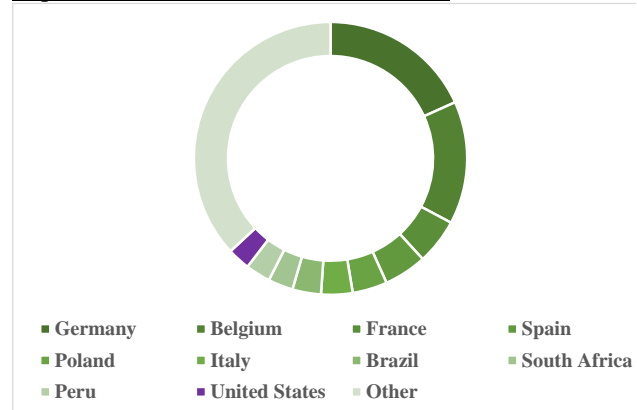
The turnover of the Dutch retail sector was valued at \$58 billion in 2024. The sector is relatively consolidated, with the two largest food retailers controlling almost 60 percent of the market. Due to rising retail prices, consumers visit multiple supermarkets and increasingly choose private label 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 both shopping online and speed delivery services remains small.

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 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 €49.5 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.

Food Processing Industry:

Over 9,155 food companies in the Netherlands generated net sales of €114 billion (\$134 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).

Foodservice – HRI Industry:

In 2024, the industry's turnover was up by three percent and valued at €15.7 billion (\$18.5 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 |
| 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	\$19
Food Processing	\$134
Food and Agriculture Exports	\$158

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	10.5%	8. Spar	1.8%
4. Plus/Coop	9.3%	9. Jan Linders	1.1%
5. Aldi	5.0%	10. Poiesz	1.0%

GDP/Population:

Population: 18.0 million
GDP: \$1,137 billion (€1,080 billion)
GDP per capita: \$63,158 (€60,000)

Strengths/Weaknesses/Opportunities/Challenges

Strengths:

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

Opportunities:

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.

Weaknesses:

Transatlantic transportation is costly and takes time. U.S. products are subject to trade barriers.

Threats:

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, 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 continues to be the second largest exporter of agricultural products in the world, after the United States and before Germany. These exports (\$158 billion in 2024) 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 its latest Draft Marco Economic Outlook for 2026 on July 10. The Dutch economy shows moderate growth, despite geopolitical tensions and discussions on import tariffs. Household and government spending are up, and purchasing power is rising. The government deficit is increasing (2.7 percent of the GDP in 2026), as public expenditure is rising faster than revenues. According to CPB, clearer policy choices are needed to safeguard the long-term earning capacity of the Dutch economy. More detailed information can be found on the website of the CBP, <https://www.cpb.nl/en/forecasts>.

Dutch Food Retail Market

The turnover of the Dutch food retail industry for 2024 is estimated at €49.5 billion (\$57.9¹ billion). Due to the disappearance of tobacco sales in grocery stores, total supermarket turnover in 2024 was slightly lower than in 2023. Without this tobacco ban, turnover would have actually increased by approximately 2.5 percent, according to NielsenIQ². Tobacco was often a "pull factor" people would come in for a pack of cigarettes and then also buy chewing gum, energy drinks, or snacks. That effect is now largely gone, causing supermarkets to lose revenue on other products as well.

The Dutch food retail is relatively consolidated, with the two largest food retailers Albert Heijn and Jumbo controlling 58 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/185445/nielseniq-marktaandeel-ah-piekt-plus-en-spar-stijgen>.

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

¹ \$1 = €0.85 (7/31/2025)

² <https://www.foodpersonality.nl/branche-cijfers/branche-cijfers/19006/supermarktomzet-daalt-naar-euro-49-9-miljard-in-2024>

and focus on selling food stuffs, their non-food items are quite limited. The remaining 25 percent, 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.

Advantages and Challenges

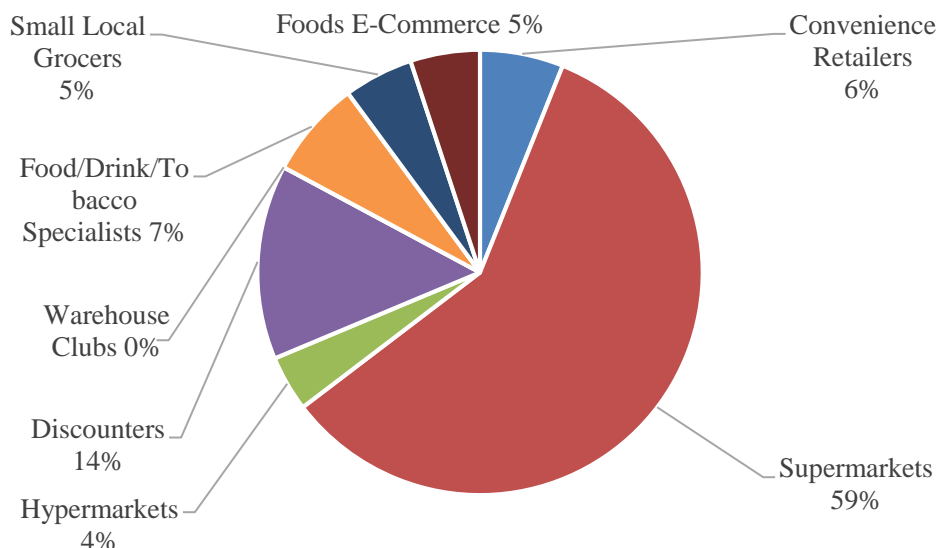
Table 1. Advantages and Challenges of the Dutch Food Retail Market

<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).	The Dutch are price conscious. Transatlantic transportation is costly, takes time, and requires the use of containers. U.S. products are subject to trade barriers.
Importers of retail-ready products 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 innovative, yet affordable products. U.S. producers have 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 or an image issue.
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.	U.S. suppliers of beef from hormone-treated cattle, poultry, products containing genetically engineered-derived ingredients that are not EU approved, and flour bleaching agents, cannot export 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.
The “Make America Healthy Again” (MAHA) initiative emphasizes reducing artificial colors in favor of natural colors, making it easier for U.S. food products to comply with EU regulations.	Fierce competition on price, quality, uniqueness, and innovation.

Source: FAS The Hague

Retail Sales by Channel

Figure 1. Retail Market by Channel 2024



Source: Euromonitor

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 and trade barriers can complicate exporting to the Dutch market. The EU also has several Free Trade Agreements 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 and Distribution Channels

Figure 2. 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](#), [Action](#), 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	37.7	Albert Heijn, AH XL, Albert.nl, AH To Go
Superunie Industrieweg 22B, 4153 BW Beesd www.superunie.nl	26.4*	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	20.3	Jumbo
Lidl Havenstraat 71, 1271 AD Huizen www.lidl.nl	10.5*	Lidl
Aldi Holding Pascalweg 21, 4104 BE Culemborg www.aldi.com	5.0*	Aldi

Source: <https://www.distrifood.nl/185445/nielseniq-marktaandeel-ah-piekt-plus-en-spar-stijgen>

* FAS/The Hague estimates

Import Procedures

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. Detailed 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>.

Sector Trends:

Private Labeled Products

The market share for private label remains strong at an estimated 39 percent across Europe. In the lead were Switzerland, Spain, the Netherlands, the UK, and Portugal – where almost every second product sold is a retailer brand. The Netherlands’ market share is 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 and convenience. 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 19-20, 2026. 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 2023. Total consumer spending on products certified as sustainable grew by 14 percent in 2023 to €12.6 billion (\$14.9 billion). The share of sustainable food compared to total spending on food stabilized at 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) 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 its wide availability of sustainable products. It is expected that spending on sustainable certified products in 2024 will continue to grow, especially as purchasing power is forecast to go up in the Netherlands.

Online Shopping

In 2024, online grocery sales in the Netherlands generated around €1.7 billion in revenue – roughly three to four percent of supermarket turnover. Inflation is leading consumers to shop more consciously – visiting multiple retail chains and comparing prices. 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. Online shopping of groceries 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.

While almost all supermarket chains are active, major players in online grocery sales include Picnic, Albert Heijn ([ah.nl](https://www.ah.nl)) and Jumbo.com, which together dominate the sector. Albert Heijn estimates that over 10 percent of its revenue now comes from online sales, highlighting its leadership in this channel.

[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

Speed delivery services (Dutch: *flitsbezorgers*) occupy a specific niche in the grocery market. These online platforms promise to deliver groceries within 10 to 20 minutes, typically ordered via an app. Orders are packed in so-called *dark stores*, small, local warehouses, and handed over to a delivery rider who brings them to the customer. Today, [Flink](#) is the only remaining player of operational significance in the Netherlands. While these services still appeal to younger consumers with busy lifestyles who are willing to pay for convenience, broader demand is declining. Rising delivery costs, longer wait times, and a tight labor market, making it harder to recruit delivery staff, continue to put pressure on the business model.

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 nutritional composition within a given 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](#).

SECTION III. COMPETITION

In 2024, total Dutch imports of agricultural and related products were valued at \$114.1 billion. Imports from the United States totaled \$3.5 billion, down by almost seven percent due to lower imports of soybeans and wood pellets.

The United States was the 10th largest supplier of consumer-oriented products to the Netherlands, after several EU Member States, Brazil, South Africa, and Peru. Total Dutch imports of consumer-oriented products (\$60.6 billion) were up by almost eight percent. Imports from the United States were valued at \$1.6 billion, dominated by tree nuts, soup, beef, distilled spirits, processed vegetables, and chocolate & chocolate products.

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, 2024

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: \$671 From USA: \$4	1. Belgium 2. Germany 3. Poland 4. France	56 12 7 5	Local breweries brew good quality and innovative craft beer using U.S. hops	Strong demand for new flavors, funky labels, and innovative tastes.

	5. U.K. 13. USA	4 1	and successfully compete directly with U.S. craft beer.	
Distilled spirits (Product group) Total imports: 1,609 From USA: \$153	1. UK 2. Germany 3. Belgium 4. USA	19 18 16 10	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: \$825 From USA: \$21	1. Germany 2. Belgium 3. Italy 4. Thailand 5. China 11. USA	19 16 10 8 7 3	Good quality sauces are locally available and benefit from being in the EU market.	Demand for innovative and unique, yet affordable condiments and sauces.
Bakery goods (Product group) Total imports: \$3,753 From USA: \$30	1. Belgium 2. Germany 3. Italy 4. France 15. USA	28 26 7 6 1	Local availability of good quality pastries and cakes.	Growing demand for pastry and cakes containing chocolate or confectionary.
Sweetpotato (HS071420) Total imports: \$175 From USA: \$63	1. Egypt 2. USA 3. China	38 36 7	Egypt, and increasingly China, competes with the USA on the sweetpotato market.	Strong demand for sweetpotato and sweetpotato products.
Beef (Product group) Total imports: \$2,777 From USA: \$183	1. Germany 2. Belgium 3. Ireland 4. Argentina 6. USA	16 11 9 7 7	1, 2, and 3 are within the EU.	There is a growing shortage of good quality, consistent, grain-fed, and marbled beef.
Sugar and sugar confectionary (HS17) Total imports: \$1,704 From USA: \$45	1. Belgium 2. Germany 3. France 4. Spain 8. USA	28 25 12 3 3	All are close to the market and offer good quality products.	Demand for extreme candy, in taste, color, size, driven by social media
Chewing gum & candy (Product group) Total imports: \$748 From USA: \$22	1. Germany 2. Belgium 3. Spain 4. Poland 5. China 8. USA	27 24 7 5 5 3	1, 2, 3, and 4 are close to the market and offer good quality products.	Demand for extreme products, in taste, color, size, driven by social media

Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS

A. Top Consumer-Oriented Products from the World

- Wine
- Beef
- Food preparations
- Grapes

B. Top Consumer-Oriented Products from the United States

- Food preparations
- Beef
- Almonds
- Distilled Spirits

C. 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

D. U.S. Products Not Present in Significant Quantities 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 and colors
 - flour bleaching agents (chlorine, bromates, and peroxides)

SECTION V. 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, please contact the Foreign Agricultural Service:

USDA's Foreign Agricultural Service (FAS)

Covering the Netherlands, Denmark, Sweden, Norway, Finland, Iceland, and Norway

U.S. Embassy - John Adams Park 1, 2244 BZ, Wassenaar, the Netherlands

E-mail: AgTheHague@usda.gov

Phone: +31 (0)70 3102 305

Government:

The Netherlands [Food and Consumer Product Safety Authority](#), or NVWA, is the name of the Dutch food safety authority. It is an independent agency in the Ministry of Agriculture, Fisheries, Food Security, and Nature. The NVWA monitors animal and plant health, animal welfare, and the safety of food and consumer products, as well as enforcing nature legislation.

The Netherlands Food and Consumer Product Safety Authority (NVWA)

PO Box 43006, 3540 AA Utrecht, the Netherlands

Email: info@nvwa.nl

Website: <https://english.nvwa.nl/>

Ministry of Agriculture, Fisheries, Food Security, and Nature

P.O. Box 20401, 2500 EK The Hague, the Netherlands

Website: <https://www.government.nl/ministries/ministry-of-agriculture-fisheries-food-security-and-nature>

Retail Association:

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Attachments:

No Attachments