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Report Highlights:

The Dutch food retail market remains one of the most attractive entry points for U.S. consumer-oriented food products due to its high purchasing power, sophisticated retail sector, and role as a distribution hub for Northwestern Europe. The turnover of the Dutch retail sector was valued at $58 billion in 2025. The sector is relatively consolidated, with the two largest food retailers controlling almost 60 percent of the market. Consumers visit multiple local supermarkets and increasingly choose private label products. At the same time the demand for sustainably produced products, products that are healthy and nutritious, and affordable convenience products remains strong. E-commerce is now the fastest-growing retail channel and is estimated to generate almost $5 billion in revenue, with just over eight percent of supermarket turnover.

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.

Consumer-Oriented Agricultural Imports

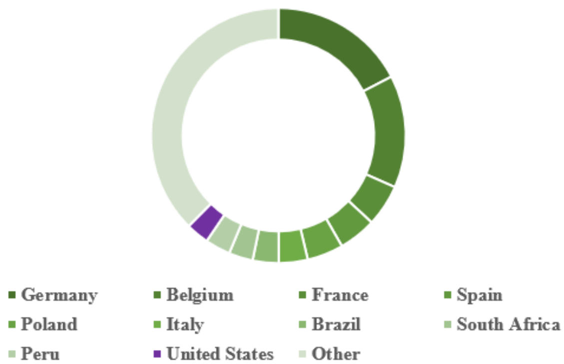


Chart 1: Top Exporting Countries to the Netherlands

Food Processing Industry:

Over 9,045 food companies in the Netherlands generated net sales of €114 billion ($129 billion) in 2024. The industry is a steady supplier of jobs in the Netherlands (162,000). The Dutch food industry is an internationally operating sector with 62% of its products sold internationally, focusing on the German, French, and Belgian consumer market.

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 2025 was estimated at €51.1 billion ($58 billion) – 80 percent being sales of food products. Consumers are looking for products on sale, while sales of private labeled products remain strong. Cheaper, further processed variants and discount stores are gaining popularity.

Foodservice – HRI Industry

In 2025, the industry's turnover was up by four percent and valued at €16.4 billion ($18.5 billion), as consumer spending power improved and warm spring and summer weather boosted sales. At the same time, due to low profit margins, many restaurants, bars and cafés were forced to close their doors. Businesses that respond well to changing market conditions, adapt easily, or develop innovative new concepts still thrive.

Quick Facts CY 2025

Imports of Consumer-Oriented Products

$68.8 billion

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

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

Food Industry by Channels 2025, in $ billion:

Retail Food Industry	$58
Food Service-HRI	$19
Food Processing	$129
Food and Agriculture Exports	$177

Top 10 Food Retailers in the Netherlands, Market Share:

1. Albert Heijn	38.2%	6. Dirk/Deka	4.0%
2. Jumbo	19.9%	7. Hoogvliet	1.9%
3. Lidl	11.8%	8. Spar	1.7%
4. Plus/Coop	8.4%	9. Poiesz	0.8%
5. Aldi	5.9%	10. Boon	0.6%

GDP/Population:

Population: 18.1 million

GDP: $1,298 billion (€1,150 billion)

GDP per capita: $71,670 (€63,500)

Strengths/Weaknesses/Opportunities/Challenges

Strengths:	Weaknesses:
The Netherlands is the gateway to Europe for U.S. products and the home to specialized traders and buyers of agricultural and related products. The first buyers are here.	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 first buyers 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 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 Brazil, Germany, and China. These exports ($177 billion in 2025) 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 projections on March 12 in the Central Economic Plan 2026 (CEP). The Dutch economy continues to grow steadily for the time being, but international uncertainty remains high. Purchasing power is expected to rise in 2026 but remain broadly unchanged overall in 2027 as real wage growth is offset by increased costs. At the same time, public finances are set to deteriorate due to higher expenditure on defense, healthcare and social security, among other things. This is according to the latest projections by CPB Netherlands Bureau for Economic Policy Analysis, https://www.cpb.nl/en/forecast/central-economic-plan-cep-2026.

The turnover of the Dutch food retail industry is estimated at approximately €51 billion ($58 billion) in 2025. The sector recovered from the impact of high food inflation and the 2024 tobacco sales ban in supermarkets, with food retail turnover increasing in 2025. According to Statistics Netherlands (CBS), turnover in the food retail sector (shops selling food, beverages, and tobacco) increased by 3.4 percent in 2025 compared with 2024, while supermarket turnover showed continued growth.

The disappearance of tobacco sales from supermarkets continued to affect sales comparisons, as tobacco historically generated additional purchases of other convenience products such as chewing gum, beverages, and snacks. However, supermarkets increasingly compensated for this loss through higher food sales, expanded private-label offerings, promotions, and investments in online and convenience channels.

The Dutch food retail sector remains highly consolidated. The two largest supermarket chains, Albert Heijn and Jumbo, account for more than half of grocery sales, while discount retailers including Lidl and Aldi continue to maintain a strong position among price-conscious consumers. Competition remains intense as retailers focus on price promotions, private-label expansion, and improving value-for-money perceptions.

Dutch consumers continue to be highly price sensitive. Although inflationary pressures eased in 2025, many households remained focused on affordability and continued to compare prices across supermarkets. Promotional campaigns, loyalty programs, and private-label products remain key tools used by retailers to attract and retain customers. This environment creates opportunities for U.S. suppliers that can offer competitive pricing, differentiated products, and ingredients for retailer-brand programs.

Supermarket accessibility remains one of the strengths of the Dutch food retail system. Consumers can typically find one or more supermarkets within their village, neighborhood, or city district, making grocery shopping highly convenient. Full-service supermarkets dominate the market and are generally located in residential areas or city centers, focusing primarily on food products with a limited non-food assortment.

The Netherlands has approximately 6,000 food retail outlets and the sector provides employment for nearly 300,000 people. Most outlets are full-service supermarkets with sales areas generally ranging from 500 to 1,500 square meters. The remaining outlets consist largely of convenience and "on-the-go" formats, including SPAR City, Jumbo City, and Albert Heijn To Go locations near office buildings, universities, public transportation hubs, and high-traffic urban areas.

Traditional hypermarket formats remain limited in the Netherlands compared with other European markets. Large-format stores such as Albert Heijn XL and Jumbo Foodmarkt exist primarily in larger shopping areas and industrial locations. Instead, Dutch retailers have focused on convenient neighborhood supermarkets, smaller urban formats, and digital ordering platforms.

Advantages and Challenges

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

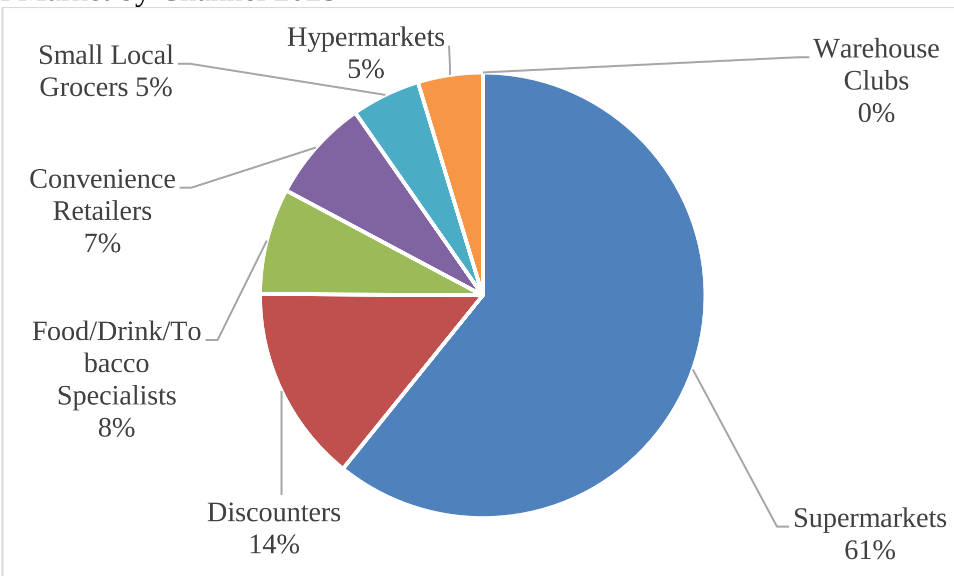
U.S. Supplier Strengths & Market Opportunities	*U.S. Supplier Weaknesses and Competitive Threats*
The Netherlands is the most important gateway for U.S. products to the European Union (EU).	The Dutch are price conscious. Transatlantic transportation is costly and requires the use of containers. It also takes time which can negatively impact the remaining shelf life of U.S. products. Products from the USA 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.
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 3rd country competitors.
Make America Healthy Again (MAHA) focuses on encouraging the use of simpler, more natural ingredients and reducing the use of certain artificial additives, colors,	Fierce competition on price, quality, uniqueness, and innovation.

preservatives, and highly processed ingredients in the U.S. food supply, making it easier to comply with EU Regulations.	

Source: FAS/The Hague

Retail Sales by Channel

Figure 1. Retail Market by Channel 2025



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	38.2	Albert Heijn, AH XL, Albert.nl, AH To Go
Jumbo Groep Holding Rijksweg 15, 5462 CE, Veghel www.jumbo.com	19.9	Jumbo
Superunie Industrieweg 22B, 4153 BW Beesd www.superunie.nl	19.0*	Plus/Coop, Deen, Hoogvliet, Spar, Boni-Markten, Boon, Detailresult Groep, Jan Linders, Poiesz, Sligro, Dirk
Lidl Havenstraat 71, 1271 AD Huizen www.lidl.nl	11.8	Lidl
Aldi Holding Pascalweg 21, 4104 BE Culemborg www.aldi.com	5.9	Aldi

Source: https://www.distrifood.nl/195430/marktaandelen-aldi-groeit-hard-ah-klimt-en-jumbo-zakt-onder-20

* 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
Private label reached record market penetration and intensified competition for branded products. Dutch consumers remained highly value-conscious, and retailer-owned brands continued gaining share across most food categories. The Netherlands now has one of the highest private-label shares in Europe (about 55% of grocery sales), increasing pressure on A-brands while creating opportunities for U.S. suppliers of ingredients, bulk products, and retailer-brand programs. 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 25-26, 2027. Please contact agthehague@usda.gov if you are a U.S. interested party and require more information about the show.

Strong Demand for Food Labeled Sustainable Products
Consumer consciousness about how food products are produced is growing. Wageningen University and Research (WUR) annually publishes the "Sustainable Food Monitor" (Monitor Duurzaam Voedsel) report, which provides an overview of consumer spending on sustainable food in the Netherlands. Total consumer spending on products certified as sustainable grew by 4 percent in 2024 to €14.3 billion ($16.8 billion). The share of food labeled sustainable compared to total spending on food stabilized around 21 percent. Sustainable food labeled products are recognizable to consumers when they have a quality mark. Products with the 'Better Life' (Dutch: Beter Leven) quality mark were most popular, followed those with the 'Rainforest Alliance' quality mark and organic certified products. Most of the spending takes place in the supermarket due to wider availability of sustainable products.

E-commerce
Online grocery remained the fastest-growing retail channel. E-commerce continued to outpace store-based food retail, with Dutch online retail turnover rising strongly in 2025 and grocery delivery services such as Picnic and supermarket-operated platforms expanding their reach. This trend is increasing demand for convenient, ready-to-eat, snack, beverage, and home-delivery-friendly products. Online grocery sales in the Netherlands are estimated to generate around €4.3 billion in revenue – just over eight percent of supermarket turnover.

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) 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.

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 2025, total Dutch imports of agricultural and related products were valued at $128.7 billion. Imports from the United States totaled $4.0 billion, up by $470 million due to higher imports of ethyl alcohol, almonds, liqueurs, and whiskies.

The United States continues to be the 10th largest supplier of consumer-oriented products to the Netherlands, after several EU Member States, Brazil, Peru, and South Africa. Total Dutch imports of consumer-oriented products ($68.8 billion) were up by $9 million. Imports from the United States were valued at $2.0 billion, led by tree nuts, food preparations, beef, dairy products, 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, 2025

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: $638 From USA: $4	1. Belgium 2. Germany 3. France 4. Poland	55 14 6 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: $1,719 From USA: $468	1. USA 2. U.K. 3. Germany 4. Belgium	27 16 13 12	Competition from good quality products produced in neighboring countries.	Strong demand for liqueurs and whiskies with funky labels, innovative tastes, and that have a story to tell.
Condiments & sauces (Product group) Total imports: $920 From USA: $18	1. Germany 2. Belgium 3. Italy 4. Thailand 11. USA	19 16 11 7 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: $4,054 From USA: $21	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.
Sweetpotatoes (HS071420) Total Imports: $227 million From USA: $52	1. Egypt 2. USA	56 23	Egypt is gaining ground in the Dutch import market by offering lower prices, closer proximity, favorable seasonal availability, and rapidly expanding supply.	Egypt has also benefited from supply gaps in Europe and strong EU demand for sweet potatoes. The Netherlands acts as a distribution hub for Europe.
Beef and beef products (Product group) Total imports: $3,860 From USA: $186	1. Germany 2. Belgium 3. Poland 4. Argentina 8. USA	17 10 9 8 5	Germany, Belgium, and Poland are close to the market.	There is a shortage of high quality, consistent, grain fed, tasty, and marbled beef.
Sugar and sugar confectionary (HS17) Total imports: $1,835 From USA: $35	1. Germany 2. Belgium 3. France 10. USA	31 23 11 2	First three countries are close to the market and offer good quality products while the USA produces candy that is innovative in color, smell, taste, packaging and	Demand for sweet and spicy (swicy) candy with bold colors and new taste combinations in fun packaging from the United States, driven by social media. Products from collaborating brands

			theme.	are popular.
Chewing gum & candy (Product group) Total imports: $905 From USA: $22	1. Germany 2. Belgium 3. Poland 4. China 5. Spain 10. USA	34 22 6 5 4 2	1, 2, and 3 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, https://english.nvwa.nl/about-us/organisation.

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

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Attachments:

No Attachments