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**Report Name:** Food Service - Hotel Restaurant Institutional

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**Report Highlights:**

Hotel, restaurant, and institutional (HRI) foodservice industry sales in the Netherlands rebounded in 2021 to almost \$11.8 billion. This was an increase of 37 percent compared to 2020, which had been a dramatic year for the foodservice sector due to the imposed measures to combat the coronavirus (COVID-19). Sales via home delivery have exploded since the outbreak of the pandemic, accounting for more than a fifth of total foodservice sales. This segment will continue to grow as food retailers unite with delivery platforms to serve consumers that are looking for affordable convenience. The foodservice industry is facing a tight labor market, rising food prices, and competition from food retail stores which are now offering more prepared options and grab-and-go meals at their stores. Despite these challenges, foodservice sales are expected to continue to grow in 2022, albeit at a much slower pace compared to the growth rate in 2021.

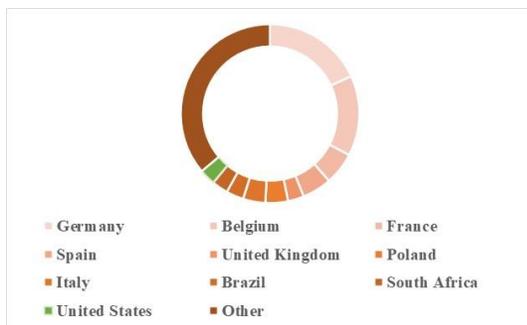
## Market Fact Sheet: The Netherlands

### Executive Summary:

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

### Imports of Consumer-Oriented Products:

Products from other EU Member States lead Dutch imports of consumer-oriented products. In 2021, the United States was the eighth largest supplier of these products to the Netherlands, with imports valued at almost \$1.5 billion.



Source: Trade Data Monitor

### Food Processing Industry:

Over 7,340 food companies in the Netherlands generated net sales of \$88 billion in 2021. The industry supplies 146,000 jobs in the Netherlands and the number of food companies continues to grow, driven by new small food companies (with less than 10 employees).

### Food Retail Industry:

The Dutch retail sector is consolidated, employs almost 300,000 people, and operates 4,500 stores. This industry profited from the time when many HRI-Foodservice outlets had to temporarily shut down. The industry's forecasted turnover for 2021 is \$47.4 billion. Consumers demand variety, fresh, and convenient products at competitive prices. The estimated market share of online shopping is seven percent in 2021.

### Foodservice – HRI Industry:

After a decline of 37 percent in 2020, due to the imposed measures to combat the spread of the coronavirus, the foodservice industry's turnover for 2021 rebounded to \$11.8 billion. Sales of home delivery exploded since the outbreak of the pandemic and will continue to grow.

## Quick Facts CY2021

Imports of Consumer-Oriented Products, total:  
\$50.6 billion

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

- |                      |                  |
|----------------------|------------------|
| 1. Cocoa beans       | 6. Bananas       |
| 2. Food preparations | 7. Baked goods   |
| 3. Fats and oils     | 8. Ethyl alcohol |
| 4. Wines             | 9. Berries       |
| 5. Avocados          | 10. Coffee       |

### Food Industry by Channels 2021, in \$ billion:

|   |         |
|---|---------|
| Consumer-Oriented Products Imports      | \$50.6  |
| Consumer-Oriented Products Exports      | \$94.6  |
| Agricultural & Related Products Imports | \$103.3 |
| Agricultural & Related Products Exports | \$140.9 |
| Food Industry                           | \$88.0  |
| Food Retail                             | \$47.4  |
| Food Service                            | \$11.8  |

### Top 10 Food Retailers, Market Share:

|                 |       |              |      |
|-----------------|-------|--------------|------|
| 1. Albert Heijn | 35.9% | 6. Dirk/Deka | 5.1% |
| 2. Jumbo        | 21.8% | 7. Coop      | 3.9% |
| 3. Lidl         | 10.7% | 8. Hoogvliet | 2.0% |
| 4. Plus         | 6.5%  | 9. Deen      | 1.5% |
| 5. Aldi         | 5.2%  | 10. SPAR     | 1.2% |

### GDP/Population:

Population: 17.5 million  
GDP: \$812 billion  
GDP per capita: \$46,411

### Strengths/Weaknesses/Opportunities/Challenges

**Strengths:** U.S. producers are professional, offer great variety, and deliver products with a consistent quality. U.S. farmers have a good story to tell about sustainability, farm to table supply chains, and their heritage.  
**Weakness:** Shipping time & costs, container shortages, and import tariffs make U.S. products more expensive. Some U.S. food products suffer from a negative perception among Dutch consumers due to misinformation.  
**Opportunities:** There is a growing demand for food products with a special claim and sustainable production method and for products that are healthy and nutritious.  
**Threats:** There is fierce competition on price, quality, uniqueness, and innovation from other EU countries, or others which have negotiated lower tariff rates, such as Canada.

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

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## SECTION I. MARKET SUMMARY

### *Overall Business Climate*

The fundamental strengths of the Dutch economy continue to be its stable political climate, highly developed financial sector, strategic location, well-educated and productive labor force, and high-quality physical and communications infrastructure. According to the latest economic outlook of the Netherlands Bureau for Economic Policy Analysis (CPB), the most important economic consequence for the Netherlands is higher energy prices, a direct result of Russia's invasion of Ukraine. The additional increase in energy prices comes on top of an already high inflation rate. In its Central Economic Plan (CEP) published on March 9, 2022, the CPB projects an inflation rate of 5.2 percent for 2022. Additional information about rising energy prices, purchasing power, interest rates, and unemployment can be found on the website of the CPB, <https://www.cpb.nl/en/forecasts>.

### *Consumer Trends*

After a period of reflection and uncertainty during lockdown, post COVID-19 Dutch consumers seem to be stressed and pressed for time. They again are struggling to do many things on a regular weekday such as taking care of the family, doing their job, going to the gym, engaging socially, and of course eating. Consumers are faced with a dilemma: less time for buying food and knowledge about preparing meals versus a growing awareness of and interest in health, origin, sustainability, and nutrition, while the overall costs of living continue to increase, as well as food prices. As a result, the demand for convenient, healthy, and nutritious food products, albeit at an affordable price, is growing more than ever before. Driven by Millennials and Generation Z, demand is also growing for instant delivery of foodstuffs. Sales of packaged food in smaller portions continues to grow as well due to the slowly shrinking average household size. People are increasingly eating alone and/or eating out (affordable convenience). International cuisines that are gaining popularity include foods from Israel, Lebanon, and Syria.

Consumer consciousness about how and where food products are produced is growing. More than ever, consumers want to know whether the food was produced in a sustainable way. They are also interested in fair-trade, locally grown, and organic food products, more detailed information can be found in [the USDA FAS Netherlands Food Retail Market report](#). The market of products that are vegan or have a free-from claim is growing, and retailers are increasingly dedicating shelf space for these products. Younger consumers are also willing to pay for authenticity. They want to hear or read about who produced a food product and what the story behind the product is. This desire for authenticity also applies to foodservice outlets. Restaurant owners that have a story to tell appeal to today's consumers.

### *Foodservice – HRI Market Sales Rebounded In 2021*

According to [Euromonitor International](#) (Euromonitor), a market research provider, total sales of the HRI foodservice industry in 2021 were valued at \$11.8<sup>1</sup> billion, up by almost 37 percent compared to 2020 – which was a dramatic year for most foodservice HRI outlets due to the imposed measures to combat the spread of the coronavirus (COVID-19).

According to Euromonitor's Consumer Foodservice Report of March 2022, "The consumer foodservice recovery started in earnest in 2021. Consumers were very excited about being able to go back to

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<sup>1</sup> \$1 = €1

foodservice outlets and, when lockdown was lifted after the first quarter of 2021, bars and restaurants were managing to dramatically increase their turnover.” However, at the same time, the industry is also facing a couple of challenges. Many foodservice outlets are struggling to find staff because many former workers found a different job during lockdown as well as the very tight labor market in the Netherlands. Also, foodservice entrepreneurs have seen food prices go up, which forced them to increase menu prices but at the same time impacted margins. Since the latter part of 2021, food manufacturers have been confronted with a large increase in production costs, ranging from agricultural raw materials to packaging materials, transport (container), and energy. Finally, driven by the Millennials and Generation Z’s demand for affordable convenience products, the foodservice industry is facing competition from food retailing. Supermarkets like Spar, Albert Heijn, and Jumbo are offering ready-made sandwiches, fresh juices, and hot prepared meals, directly competing with foodservice outlets.

Table 1. Foodservice Sales by Sub Sector, in million \$

|                             | 2017     | 2018     | 2019     | 2020    | 2021     |
|-----------------------------|----------|----------|----------|---------|----------|
| Full-Service Restaurants    | 4,813.0  | 5,017.7  | 5,281.3  | 3,378.6 | 4,419.7  |
| Limited-Service Restaurants | 3,947.6  | 4,213.4  | 4,454.4  | 3,345.5 | 4,134.5  |
| Cafés/Bars                  | 2,775.3  | 2,892.5  | 3,018.5  | 1,406.0 | 2,484.5  |
| Self-Service Cafeterias     | 619.2    | 637.3    | 663.0    | 383.0   | 580.5    |
| Street Stalls/Kiosks        | 229.3    | 237.9    | 245.1    | 149.2   | 221.7    |
| Total                       | 12,384.4 | 12,998.9 | 13,662.3 | 8,662.3 | 11,840.9 |

Source: Euromonitor

According to Euromonitor’s Consumer Foodservice Country Report of March 2022, “Home delivery recorded a quantum leap in its share of value sales when the pandemic hit the Netherlands in 2020, almost doubling to more than a fifth of total sales.” While the home delivery share saw a slight decline in 2021, industry experts expect this segment to continue to grow, albeit at a slower pace.

Table 2. Foodservice Sales by Distribution Type, in percentage

|               | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------|------|------|------|------|------|
| Drive-Through | 2.4  | 2.4  | 2.4  | 3.9  | 2.8  |
| Home Delivery | 7.7  | 9.3  | 11.0 | 21.4 | 18.8 |
| Takeaway      | 14.8 | 14.8 | 14.7 | 24.5 | 17.9 |
| Eat-In        | 75.1 | 73.4 | 71.9 | 50.3 | 60.4 |
| Total         | 100  | 100  | 100  | 100  | 100  |

Source: Euromonitor

An increasing number of consumers are placing orders for home delivery through third party delivery platforms. Younger consumers are particularly comfortable in using mobile apps on their smartphones to order and pay for this service, as it offers greater convenience. For the past 18 months, delivery scooters and bicycles have been working overtime in the Netherlands. More recently, traditional food retailers like Coop, Jumbo, and Albert Heijn announced they are joining forces with these delivery platforms, which enables them to deliver groceries within minutes to their customers and satisfy those that are looking for convenience but are also increasingly delaying this purchase decision. [Just Eat Takeaway](#) leads the market followed by the second and third largest companies in this segment, respectively [Deliveroo](#) and [UberEats](#) and all deliver meals from various restaurants, both full service and limited

service, to customers in the Netherlands. The [FoodService Institute of the Netherlands](#) (FSIN) expects the market for home delivery of meals to double between now and the end of this decade.

Table 3. Advantages and Challenges of the Dutch Foodservice Market

| <b>Advantages</b><br><i>U.S. Supplier Strengths &amp; Market Opportunities</i>  | <b>Challenges</b><br><i>U.S. Supplier Weaknesses and Competitive Threats</i>   |
|---|--|
| Gen Z is more food conscious and eats more out of the home at an affordable price than the other convenience generation, the Millennials. This creates opportunities for the industry.  | Transatlantic transportation is costly and takes time, especially now when the costs of freight containers and fuel costs have risen sharply.  |
| HRI-Foodservice companies that offer online ordering in combination with pick-up or home delivery have been doing well since the pandemic. This offers opportunities for U.S. foodservice chains that want to tap into this segment.    | U.S. products have become more expensive due to rising prices for agricultural commodities, costs for packaging materials, transportation, and energy have gone up, and the exchange rate. |
| The Dutch are affluent, open minded, and curious consumers. This creates opportunities for tasty, innovative, and convenient products on the one hand, but also for healthy and nutritious food products -- all at an affordable price. | Fierce competition on price, quality, uniqueness, and innovation from other EU countries and from non-EU countries that have negotiated lower tariff rates, such as Canada and Mexico.     |
| Overall consumers' consciousness about and interest in food products is growing and there is willingness to pay for authenticity, storytelling, and taste.  | Beef that is not hormone-free, poultry, and products containing GMO derived ingredients (that are not EU approved) cannot be exported to the Netherlands.                                  |

Source: FAS/The Hague

## SECTION II. ROAD MAP FOR MARKET ENTRY

### *Entry Strategy*

Before introducing a new product to the market, FAS/The Hague advises U.S. new-to-market exporters to research the Dutch market. Besides this report, the USDA FAS Office in The Hague annually writes [the Exporter Guide to the Netherlands](#), [the Food Processing Ingredients Market Report](#), [the Food Retail Market report](#) and [the Food and Agriculture Import Regulations and Standards Report](#). These and other commodity reports can help a new-to-market exporter better understand the Dutch market and can be downloaded from the [FAS](#) website. In addition, FAS/The Hague advises U.S. exporters to reach out to U.S. agriculture industry groups for their expertise and local network and representatives.

After doing market research, U.S. companies should consider visiting and/or exhibiting at U.S. and foreign trade shows. These are excellent venues to make contact with local buyers, to conduct product introductions and to gauge buyers' interest. A detailed overview of European trade shows and their product focus can be found on <https://fas-europe.org/events/>. Participation in Trade Missions organized by the U.S. agriculture industry groups has also proven to be a very effective way to meet local buyers.

### Market Structure

Unlike the retail sector, the Dutch foodservice industry is fragmented and has many independent players. This is especially the case for cafés, bars, restaurants, cafeterias, and street stalls/kiosks. The majority of limited-service restaurants and delivery outlets, however, are consolidated and often part of an international chain. Well-known examples of international limited-service restaurants active in the Netherlands include McDonalds, Domino's Pizza, KFC, Burger King, Subway, and New York Pizza. Chains from the United States are popular in the Netherlands because of their efficiency and consistency, but also because the meals are affordable. They continue to be successful because they have been able to respond to changing consumer demands and now, for instance, offer vegetarian and healthier food products. More U.S. chains have also recently opened outlets in the Netherlands, including Dunkin' Donuts (coffee and donuts), Five Guys (burgers and fries), and Taco Bell (tacos, burritos, and quesadillas).

### Distribution

The majority of foodservice establishments purchase products in three different ways: directly from U.S. suppliers, from Dutch importers, or from local wholesalers/distributors. Large limited-service restaurants most likely import unique specialty ingredients directly from the United States, but generally they depend on local partners for sourcing the majority of their ingredients. Independent players, like bars and cafés, restaurants, and hotel owners, prefer to purchase from wholesalers and distributors.

The independently owned cafes and restaurants prefer to have products delivered to save time and ensure products are available when needed. High-end hotel and restaurant players prefer to buy fresh products like bakery, produce, seafood, meat, alcoholic beverages (excluding beer) and dairy products from specialized distributors. The benefit lies in the possibility to have tailor-made orders and the interpersonal relationship. Beer and non-alcoholic beverages are generally bought directly from breweries. For shelf-stable grocery products, like spices, coffee, nuts, sauces, and cooking ingredients, hotels and restaurants turn to wholesalers.

Figure 1. Distribution Channel Flow Diagram



Source: FAS/The Hague

Dutch wholesalers and distributors prefer to work with Dutch importers that are specialized in buying U.S. products, due to strict EU import requirements and standards. For meat, seafood, and wine, importers also often distribute imported products. The following wholesalers are active in the Netherlands: **Bidfood, Horesca, Hanos, de Kweker, Makro, Sligro, VHC, and Zegro**. Almost all wholesalers have shops and delivery services. Bidfood and Horesca have no shops and only deliver their products while Makro only has shops and rarely delivers. Most wholesalers operate nationwide, with the exception of, De Kweker, Zegro, and Horesca, who are active regionally.

*Sub-Sector Profiles*

Table 4. Company Shares in Chained Consumer Foodservice: % Foodservice Value 2017-2021

| % value                             | 2017  | 2018  | 2019  | 2020  | 2021  |
|-------------------------------------|-------|-------|-------|-------|-------|
| McDonald's Corp                     | 28.2  | 27.9  | 28.7  | 33.3  | 29.9  |
| Domino's Pizza Inc                  | 5.4   | 5.9   | 5.9   | 7.2   | 6.1   |
| Jumbo Food Groep BV                 | 5.4   | 5.8   | 6.2   | 4.8   | 5.4   |
| Yum! Brands Inc                     | 4.1   | 4.2   | 4.4   | 4.5   | 4.4   |
| Van de Valk Groep                   | 4.4   | 4.4   | 4.3   | 3.8   | 4.2   |
| Restaurant Brands International Inc | 3.3   | 3.6   | 3.8   | 4.5   | 4.1   |
| NS Group NV                         | 4.3   | 4.1   | 3.9   | 3.1   | 3.8   |
| New York Pizza BV                   | 3.1   | 3.3   | 3.3   | 4.1   | 3.7   |
| Inter IKEA Systems BV               | 2.5   | 2.4   | 2.3   | 1.9   | 2.3   |
| De Beren Holding                    | 1.5   | 1.5   | 1.6   | 1.5   | 1.7   |
| Doctor's Associates Inc             | 1.7   | 1.7   | 1.6   | 1.5   | 1.6   |
| Grand Moulins de Paris SA           | 1.8   | 1.7   | 1.6   | 1.5   | 1.6   |
| Fast Food Concepts BV               | 1.9   | 1.7   | 1.6   | 1.4   | 1.6   |
| Hema BV                             | 1.9   | 1.7   | 1.6   | 1.4   | 1.5   |
| Sligro Beheer NV                    | 2.0   | 1.7   | 1.5   | 1.3   | 1.4   |
| Other                               | 28.5  | 28.4  | 27.7  | 24.2  | 26.7  |
| Total                               | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

Source: Euromonitor

SECTION III. COMPETITION

This section summarizes the overall competitive situation that U.S. suppliers face in the Dutch foodservice industry. U.S. exporters of products that are also grown or produced within the EU are at a disadvantage due to proximity, shipping time, tariffs, exchange rate, and certification issues. For other products, U.S. companies often compete with other third country suppliers. There are only a handful of products where the United States has limited competition.

Table 5. Competitive Situation U.S. Suppliers Face in the Dutch Foodservice Market, 2021

| <i>Product Category<br/>(product code)<br/>Imports in \$ million</i>          | <i>Main Suppliers, in<br/>percentage</i>                              | <i>Strengths of Key<br/>Supply Countries</i> | <i>Advantages and<br/>Disadvantages of<br/>Local Suppliers</i>            |   |
|---|---|--|---|---|
| <b>Craft beer</b><br>(HS2203)<br>Total imports: \$593<br>From USA: \$6        | 1. Belgium<br>2. Germany<br>3. The U.K.<br>4. Poland<br><b>9. USA</b> | 56<br>11<br>7<br>7<br><b>1</b>               | Competition from neighboring countries, dominated by Belgium and Germany. | Strong demand for new flavors, funky labels, and innovative tastes.   |
| <b>Sweet potatoes</b><br>(HS071420)<br>Total imports: \$179<br>From USA: \$84 | <b>1. USA</b><br>2. Egypt<br>3. Belgium<br>4. The U.K.                | <b>47</b><br>18<br>6<br>4                    | Competition from Egypt, Spain, Honduras, South Africa, and China.         | Supermarkets are increasingly selling fresh and processed sweet potatoes.<br>Demand for variety and quality products. |

|   |   |                                       |   |  |
|---|---|---------------------------------------|---|--|
| <b>Condiments and Sauces</b><br>(Product group)<br>Total imports: \$672<br>From USA: \$21 | 1. Germany<br>2. Belgium<br>3. The U.K.<br>4. Italy<br>5. Poland<br><b>11. USA</b>      | 18<br>14<br>9<br>8<br>8<br><b>3</b>   | Top suppliers benefit from proximity and being in the EU market.  | Demand for good quality and unique products.   |
| <b>Snack food</b><br>(Product group)<br>Total imports: \$2,160<br>From USA: \$44          | 1. Belgium<br>2. Germany<br>3. France<br>4. The U.K.<br><b>10. USA</b>                  | 29<br>28<br>7<br>5<br><b>2</b>        | Top suppliers are close to the market and offer good quality products.  | Demand for branded, good quality, and unique products that have a story to tell.   |
| <b>Spices</b><br>(Product group)<br>Total imports: \$591<br>From USA: \$4                 | 1. China<br>2. Indonesia<br>3. Madagascar<br>4. Germany<br>5. Vietnam<br><b>20. USA</b> | 20<br>9<br>9<br>8<br>8<br><b>1</b>    | Competition from countries in Asia.   | Demand for new and high quality spices. Exports of U.S. spices including vanilla, anise, and cardamom are growing.   |
| <b>Wine</b><br>(HS2204)<br>Total Imports: \$1,109<br>From USA: \$24                       | 1. France<br>2. Italy<br>3. Germany<br>4. Spain<br>5. Chile<br><b>14. USA</b>           | 30<br>17<br>16<br>11<br>6<br><b>1</b> | France, Italy, Germany, and Spain have well known, good quality wines at competitive prices. They are also popular holiday destinations.  | No commercial availability of domestic wine in the Netherlands.  |
| <b>Distilled spirits</b><br>(Product group)<br>Total imports: \$1,194<br>From USA: \$80   | 1. The U.K.<br>2. Belgium<br>3. Germany<br><b>4. USA</b><br>5. France                   | 23<br>18<br>15<br><b>7</b><br>7       | All, except the USA, are close to the market and offer good quality products.   | Demand for branded, good quality, tasty, and unique products that have a story to tell.  |
| <b>Seafood</b><br>(Seafood products)<br>Total imports: \$5,131<br>From USA: \$103         | 1. Iceland<br>2. Norway<br>3. Germany<br>4. Belgium<br>5. Denmark<br><b>14. USA</b>     | 14<br>9<br>8<br>6<br>5<br><b>2</b>    | Iceland is leading supplier of cod, Norway leads for salmon, Germany dominates with pelagic fish. USA is leading supplier of Alaska Pollock, scallops and wild salmon. For shrimp & prawns, cod and lobster, the U.S. competes with several other non-EU exporters. | The Netherlands is an international trader in seafood products, serving foodservice markets throughout Europe. The Dutch depend on imports for Alaska Pollock, scallops, Sockeye salmon, shrimp & prawns, cod and lobster. |

|  |               |          |  |  |
|--|---------------|----------|--|--|
| <b>Beef</b><br>(beef and beef products)<br>Total imports: \$2,287<br>From USA: \$137 | 1. Germany    | 17       | Germany and  | There is not enough high quality Dutch beef available. Ireland, Argentina, Brazil, Uruguay, and the USA all step in to fill this market deficit. |
|  | 2. Belgium    | 13       | Belgium sell lower   |  |
|  | 3. Ireland    | 10       | quality and price-   |  |
|  | 4. Argentina  | 7        | competitive beef.  |  |
|  | 5. Uruguay    | 7        | The USA exports  |  |
|  | <b>8. USA</b> | <b>6</b> | high quality and grain fed beef, known for its consistency and taste, to the high-end retail and foodservice industry. |  |

Source: Trade Data Monitor

#### SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Products that, in addition to a competitive price, are unique and innovative or not sufficiently available have the best prospects in the Dutch market:

*Products Present in the Market Which Have Good Sales Potential:*

- Nuts
- Seafood
- Fresh produce
- Sauces and condiments
- Snack foods
- California wines and craft beer & spirits

*Top Consumer-Oriented Products from the World:*

- Wine
- Beef
- Cheese
- Grapes

*Top Consumer-Oriented Products from the United States:*

- Tree nuts
- Beef
- Sweet potatoes
- Cranberries

*Products Not Present in Significant Quantities, but Which Have Good Sales Potential:*

- Food products with special certification (organic, sustainable, free-from claim, etc.)
- Pulses
- Sweet corn
- U.S. wines
- Molluscan shellfish

*Products Not Present Because They Face Significant Barriers:*

- Specialty products containing non-EU approved GMO derived ingredients
- Poultry
- Beef from plants that are not yet EU approved, or not part of the NHTC program

## SECTION V. KEY CONTACTS AND FURTHER INFORMATION

If you have questions or comments regarding this report, require listings of local importers or need assistance exporting to the Netherlands, please contact FAS/The Hague:

U.S. Department of Agriculture's Foreign Agricultural Service

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### **Attachments:**

No Attachments