

**Required Report:** Required - Public Distribution

**Date:** September 22, 2023

**Report Number:** NL2023-0007

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

**Country:** Netherlands

**Post:** The Hague

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

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**Report Highlights:**

Hotel, restaurant, and institutional (HRI) foodservice industry sales in the Netherlands rebounded in 2022, valued at \$15.6 billion, and exceeded the pre-pandemic (COVID-19) levels. In 2022, sales in all segments saw an increase but the limited-service restaurants and cafés and specialist coffee outlets sales grew the most, profiting from the scaling down trend among consumers. HRI foodservice sales via home delivery exploded during the pandemic and continue to stay strong as consumers are looking for affordable convenience and are leading more home-centered lifestyles. The HRI foodservice industry is also facing challenges, including a tight labor market, rising prices of inputs, and competition from food retail stores which are now offering more prepared options and grab-and-go meals at their stores. Foodservice sales are expected to continue to grow in 2023 albeit at a slower pace.

**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 2022, the United States was the ninth largest supplier of these products to the Netherlands, with imports valued at over \$1.5 billion.



- Germany
- Belgium
- France
- Spain
- Poland
- Italy
- Brazil
- United Kingdom
- United States
- Other

Source: Trade Data Monitor

Food Processing Industry:

Over 8,195 food companies in the Netherlands generated net sales of \$83 billion in 2021. The industry has been a steady supplier of jobs in the Netherlands (150,000) and the number of food companies continues to grow due to an increasing number of small food companies.

Food Retail Industry:

The Dutch retail sector is rather consolidated, employing over 300,000 people, and operating in an estimated 4,500 stores. The sector’s turnover for 2022 is forecast at \$48.7 billion. Due to the increased costs of living, consumers are looking for products on sale and moving from branded products to private label products. Cheaper further processed variants are gaining popularity as well as discount stores. Interest in shopping for groceries on-line continues to grow.

Foodservice – HRI Industry:

Despite the rising costs of living, the Dutch foodservice industry’s turnover is back on track. Last year, total sales were valued at \$15.6 billion and exceeded the pre-pandemic level for the first time. Consumers returned en-masse to HRI foodservice outlets and picked up the social life they led prior to the pandemic.

Quick Facts CY 2022

Imports of Consumer-Oriented Products, total:  
\$52.9 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. Wheat and meslin  | 9. Cheese        |
| 5. Meat              | 10. Coffee       |

Food Industry by Channels 2022, in \$ billion:

Consumer-Oriented Products Imports	\$53
Consumer-Oriented Products Exports	\$97
Agricultural & Related Products Imports	\$113
Agricultural & Related Products Exports	\$150
Food Industry	\$83
Food Retail	\$49
Food Service	\$16

Top 10 Food Retailers in the Netherlands, Market Share:

Albert Heijn	35.9%	Dirk/Deka	5.1%
Jumbo	21.8%	Hoogvliet	2.0%
Lidl	10.7%	Spar	1.2%
Plus/Coop	10.4%	Jan Linders	1.1%
Aldi	5.2%	Poiesz	1.0%

GDP/Population:

Population: 17.8 million  
GDP: \$957 billion  
GDP per capita: \$53,764

Strengths/Weaknesses/Opportunities/Challenges

Strengths:

U.S. producers offer a great variety of food products with a consistent quality and have a great story to tell about sustainability, farm to table supply chains, and their heritage.

Opportunities:

Strong demand for food products with a special claim and that are healthy and nutritious. Demand for affordable convenience is up.

Weakness:

Transatlantic transportation is costly and takes time. Some U.S. food products suffer from a negative perception among Dutch consumers due to misinformation.

Threats:

There is fierce competition on price, quality, uniqueness, and innovation from other EU member states.

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

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## 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 (\$151 billion in 2022) 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 fundamental strengths of the Dutch economy continue to be its strategic location, mild climate, highly developed financial sector, a well-educated and productive labor force, high-quality physical and communications infrastructure, and a stable political climate. As of this report's writing, the Dutch government is in caretaker status and elections will be held in November 2023.

In August 2023, the Netherlands Bureau for Economic Policy Analysis (CPB) published its most recent economic forecast. The economy is expected to grow by 0.7 percent in 2023 and 1.4 percent next year and purchasing power is set to recover by 1.9 percent in 2024 due to wage growth. Without supplementary policy measures, the number of people in poverty is expected to rise to 5.7 percent of the population and 7 percent of children in 2024. This is according to the concept [Macro Economic Outlook \(cMEV\) for 2024](#) published by CPB. The CPB also published on August 17, 2023 [a medium-term projection for the period up to the end of 2028](#).

### **Consumer Trends**

After a period of reflection and uncertainty during lockdown, post COVID-19 the average Dutch household is struggling again to do many things on a regular weekday, including work, taking care of the family, engaging socially, and of course eating. Dutch consumers are faced with a dilemma. While on the one hand there is less time for buying groceries and less knowledge about how to prepare a meal, there seems to be a growing interest in health and nutrition but also origin and sustainable production methods on the other hand. In the meantime, overall costs of living, including food prices, continue to increase.

As a result, the demand is growing for easily accessible, convenient, healthy, and nutritious food products, albeit at an affordable price. Driven by [Millennials](#) and [Generation Z](#), demand is also growing for instant delivery of foodstuffs while sales of packaged food in smaller portions is also up. The Dutch are increasingly eating alone, eating out, and on-the-go. International cuisines that are gaining popularity include those from Israel, Lebanon, and Syria.

Consumer consciousness about how food products are produced is growing. Total consumer spending on foods certified as sustainable grew by 12 percent in 2021 to an estimated \$10 billion. The share of sustainable food compared to total spendings on food grew from 17 to 19 percent in 2021. Another trend in the Netherlands is the strong interest in plant-based diets, supported not only by an increase in the number of vegetarians or vegans but also a general shift in consumer lifestyle. More detailed information about these and other consumer trends can be found in the other Market Development reports, including [the Food Retail Market report](#).

## Foodservice – HRI Market Sales In 2022

According to [Euromonitor International](#) (Euromonitor), a market research provider, the recovery of the HRI foodservice market from the COVID-19 crises continued in 2022. Total sales were valued at €14.2<sup>1</sup> billion in 2022, up by 30 percent compared to 2021, and exceeded the pre-pandemic level 2019 level for the first time. Last year, sales in all segments saw an increase but the limited-service restaurants and cafés and specialist coffee outlets sales grew the most and profiting from the scaling down trend among consumers to spend less.

With all COVID-19 restrictions lifted, in 2022, consumers returned en-masse to HRI foodservice outlets and picked up the social life they led prior to the pandemic. Consumer spending increased quickly during the first three quarters of 2022. “By the fourth quarter of last year, the effects of high inflation (10 percent in 2022) and rising energy costs and price increases, in part due to the ramifications of the war in Ukraine, became more visible in the Netherlands”, according to Euromonitor’s Consumer Foodservice Report of March 2023. “As consumer confidence dropped, households once again became more price-sensitive and careful with their spending. As a result, many consumers traded down, from full-service to limited-service restaurants, for example.”

Table 1. Foodservice Sales by Sub Sector, in million €

	2018	2019	2020	2021	2022
Full-Service Restaurants	5,025.3	5,296.2	3,388.6	4,423.4	5,340.6
Limited-Service Restaurants	4,200.4	4,440.6	3,335.7	4,264.1	4,733.9
Cafés/Bars	2,906.0	3,034.8	1,411.6	1,462.4	3,224.8
Self-Service Cafeterias	637.3	663.0	383.0	584.0	694.0
Street Stalls/Kiosks	237.9	245.1	149.2	190.8	249.9
Total	13,006.9	13,679.7	8,668.1	10,924.7	14,243.2

Source: Euromonitor

The Dutch HRI-Foodservice industry is facing additional 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 – the unemployment rate in 2023 is forecasted at 3.6 percent. Also, foodservice entrepreneurs have seen food prices go up which forced them to increase prices on their menu but at the same time impacted margins. Since the latter part of 2021, the food industry has 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, competing directly with foodservice outlets.

Table 2. Foodservice Sales by Distribution Type, in percentage

	2018	2019	2020	2021	2022
Eat-In	73.4	72.0	50.3	56.8	63.7
Home Delivery	9.3	10.9	21.3	20.7	18.4

<sup>1</sup> \$1 = €0.93

Takeaway	14.8	14.7	24.4	19.3	15.4
Drive-Through	2.4	2.4	3.9	3.1	2.4
Total	100	100	100	100	100

Source: Euromonitor

According to Euromonitor’s Consumer Foodservice Report of March 2023, “inflation and strong pressure on disposable incomes are predicted to continue to dampen the growth potential of foodservice, with consumers more mindful of how much they spend and on what.” With a tougher economic climate, consumers are expected to opt more often for a less expensive foodservice outlet option.

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. Delivery scooters and bicycles are working overtime in the Netherlands. [Just Eat Takeaway](#) leads the market for meal delivery from various HRI foodservice outlets to consumers in the Netherlands, followed by [UberEats](#). Home delivery is expected to continue to be driven by convenience as many consumers lead more home-centered lifestyles. 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> <i>U.S. Supplier Strengths &amp; Market Opportunities</i>	<b>Challenges</b> <i>U.S. Supplier Weaknesses and Competitive Threats</i>
Generation Z is more food conscious and eats even more out of home at an affordable price than the other convenience generation, the Millennials. This creates opportunities for the industry.	U.S. products have become more expensive due to rising prices for agricultural commodities, costs for packaging materials, transportation, and energy.
HRI-Foodservice companies that offer online ordering in combination with home delivery have been doing well since the pandemic. This offers opportunities for U.S. foodservice chains that want to tap into this segment.	Transatlantic transportation is costly (costs of freight container and fuel costs have risen sharply), takes time, and is under pressure especially during discussions about greenhouse gas emissions and climate change.
The Dutch are affluent, open minded, and curious in new cuisines. 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 Member States 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 your product, 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](#), [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. 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/> or by contacting Post, see Section V. 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*

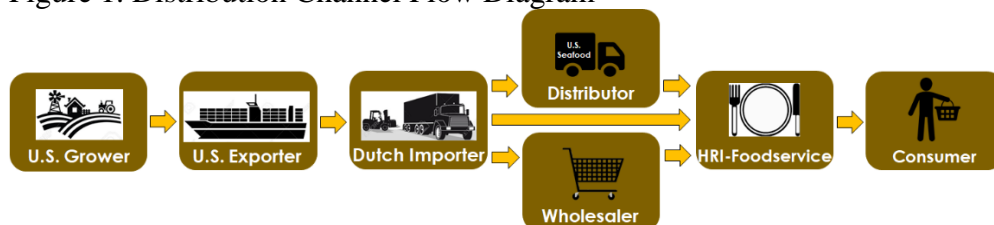
Unlike the retail sector, the Dutch foodservice industry is fragmented and has many independent players. This is especially the case for cafés/bars, restaurants, cafeterias, and street stalls/kiosks. The majority of limited-service restaurants and delivery outlets, however, are consolidated and often 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 more 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 most of their ingredients. Independent players, like bar and cafés, restaurant, and hotel owners, prefer to purchase from wholesalers and distributors.

Independently owned cafés 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, nuts, sauces, and cooking ingredients, hotel and restaurant owners 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 2018-2022

% value	2018	2019	2020	2021	2022
McDonald's Corp	27.6	28.2	32.7	30.4	28.1
Domino's Pizza Inc	5.8	5.8	7.1	6.2	6.3
Jumbo Food Groep BV	5.8	6.1	4.5	5.2	5.2
Yum! Brands Inc	3.7	3.9	4.0	4.4	4.1
Van de Valk Groep	4.3	4.3	3.7	4.2	4.0
Restaurant Brands International Inc	3.6	3.7	4.4	4.2	3.8
New York Pizza BV	3.2	3.3	4.0	3.6	3.4
NS Group NV	4.0	3.9	3.1	2.7	3.4
Inter IKEA Systems BV	2.4	2.3	1.9	2.3	2.4
De Beren Holding	1.7	2.0	1.9	2.3	2.3
Doctor's Associates Inc	1.7	1.6	1.5	1.7	1.6
Hema BV	1.6	1.6	1.4	1.6	1.5
Fast Food Concepts BV	1.7	1.6	1.4	1.5	1.4
Bart's Retail BV	1.4	1.3	1.2	1.4	1.3
Royal Ahold Delhaize NV	1.3	1.2	1.2	1.2	1.2
Happy Management Groep BV	0.9	1.0	0.9	1.2	1.1
Snackpoint Formule Management	1.1	1.1	1.0	1.1	1.1
BP plc	0.7	0.8	0.5	0.5	1.1
Albron BV	0.4	0.5	0.2	0.2	1.1
Starbucks Corp	1.0	1.0	0.7	0.7	1.0
Other	26.1	24.8	22.7	23.4	24.6
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 hand full of products where the United States has limited competition.

Table 5. Competitive Situation U.S. Suppliers Face in the Dutch Foodservice Market, 2022

<i>Product Category (product code) Imports in \$ million</i>	<i>Main Suppliers, in percentage</i>	<i>Strengths of Key Supply Countries</i>	<i>Advantages and Disadvantages of Local Suppliers</i>
Craft beer (HS2203) Total imports: \$533 From USA: \$4	1. Belgium 59 2. Germany 13 3. Poland 5 4. U.K. 4 <b>9. USA 1</b>	Competition from neighboring countries, dominated by Belgium and Germany.	Strong demand for new flavors, funky labels, and innovative tastes.
Sweetpotato (HS071420) Total imports: \$157 From USA: \$59	<b>1. USA 37</b> 2. Egypt 25 3. Belgium 8 4. Germany 5	Competition from Egypt, China, and Honduras.	Restaurants increasingly include sweetpotato products in their menu.
Condiments and sauces (Product group) Total imports: \$678 From USA: \$18	1. Germany 17 2. Belgium 14 3. Thailand. 8 4. Poland 8 <b>11. USA 3</b>	Germany, Belgium, and Poland benefit from proximity and being in the EU market.	Demand for good quality and unique products.
Snack food (Product group) Total imports: \$2,204 From USA: \$46	1. Germany 27 2. Belgium 26 3. France 8 4. U.K. 5 <b>10. USA 2</b>	Germany, Belgium, and France are close to the market and offer good quality products.	Demand for branded, good quality, and unique products that have a story to tell.
Spices (Product group) Total imports: \$530 From USA: \$4	1. China 14 2. Vietnam 13 3. Indonesia 10 4. Germany 7 5. Brazil 7 <b>20. USA 1</b>	Competition from countries in Asia.	Demand for new and good quality spices. Exports of U.S. spices including vanilla, anise, and cardamoms are growing.
Wine (HS2204) Total Imports: \$1,586 From USA: \$27	1. France 30 2. Italy 16 3. Germany 14 4. Spain 10 5. Chile 6	France, Italy, Germany, and Spain have good quality wines at competitive prices and are	Limited commercial availability of domestic wine in the Netherlands.



	<b>14. USA</b>	<b>1</b>	moreover popular holiday destinations.	
Distilled spirits (Product group) Total imports: \$1,414 From USA: \$129	1. U.K. 2. Belgium 3. Germany <b>4. USA</b>	21 17 17 <b>9</b>	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.
Seafood (Seafood products) Total imports: \$5,515 From USA: \$118	1. Iceland 2. Norway 3. Germany 4. Belgium 5. Denmark <b>14. USA</b>	14 8 7 7 6 <b>2</b>	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 (AP), 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 increasingly depend on imports for AP, scallops, Sockeye salmon, shrimp & prawns, cod, and lobster.
Beef (beef and beef products) Total imports: \$2,662 From USA: \$183	1. Germany 2. Belgium 3. Ireland 4. Argentina 5. Poland 6. Uruguay <b>7. USA</b>	15 10 10 8 8 7 <b>7</b>	Germany and Belgium sell lower quality and price competitive beef. The USA exports high quality and grain fed beef, known for its consistency and taste, to the high-end retail and foodservice industry.	There is not enough Dutch beef of high quality available. Ireland, Argentina, Uruguay, and the USA all profit from this deficit.

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 and dried fruits
- Seafood
- Fresh produce
- Pulses
- Sauces and condiments
- Snack foods
- Wines from California, craft beer, and distilled spirits

Top Consumer-Oriented Products from the World:

- Wine
- Beef
- Food preparations
- Grapes

Top Consumer-Oriented Products from the United States:

- Food preparations
- Beef
- Almonds
- Pistachios

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

- High value products with special certification
- Oysters
- Sweet corn
- U.S. wines

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

## 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:

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### Attachments:

No Attachments