

# Exporting fresh fruit and vegetables to the Netherlands



The Netherlands is a main entrance point for fresh fruit and vegetables into Europe. Its experience in trading fresh produce and efficient infrastructure make it an interesting country to explore. The Dutch market itself is much smaller and characterised by competitive pricing and a well-developed offer of convenient products. Sales are dominated mainly by supermarkets, making it a difficult country in terms of standards and compliance.

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## 1. Country description

The Netherlands, often also referred to as Holland, is a small populous country in the north-west of Europe. It borders Germany, the largest consumer market for fresh fruit and vegetables in the European Union.

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| Population (2017)   | 17.1 million   |
| GDP   | €737 billion (4.8% of EU-28)   |
| GDP per capita  | €43,000  |
| Language  | Dutch  |
| Important regions   | Amsterdam (capital), Rotterdam (port), The Hague (government)                        |

Main European trading partners in fresh fruit & vegetables

Germany, United Kingdom, Belgium

Sources: CIA World Fact Book; Eurostat; ITC Trademap

## 2. Doing business in the Netherlands

In the Netherlands, you can expect companies to be very direct in their communication. Dutch traders work fast and efficiently and expect you to do the same. The business culture is informal, especially in the fresh fruit and vegetables sector, but your business partner will generally spend less time on small talk and keep focused on the business. Punctuality and fast responses are important.

The best way to convince a client to do business with you is by having a well-organised and certified company, being proactive in your follow-up and in your communication (never leaving an email unanswered for more than a day) and complying with the agreements you make.

### Tip:

Read also the [tips for doing business with European buyers](#) on the CBI market intelligence platform.

## 3. Finding buyers in the Netherlands

Finding potential buyers in the Netherlands is not difficult. Most are easy to find on the internet, but finding the right one can be more challenging. The companies that are most eager to buy your product are not always the most reliable. These 'quick traders' can provide you with an interesting profit on the spot market, but do not always invest in a structural business relation. This means they are less motivated to solve an issue together and pose more risks for your company.

Many of the large buyers have well-established relations, mostly with medium and large suppliers that have a direct involvement with the growers. In case they are not interested in your offer, it is important to become familiar with them. To do this, the best thing to do is visit the most relevant trade fairs in Europe, [Fruit Logistica](#) in Berlin and [Fruit Attraction](#) in Madrid. Buyers that are serious about doing business with you will usually visit your facility.

### Tip:

Find an overview of Dutch buyers of fruit and vegetables on the [Fruit Logistica exhibitor list](#) or in the annual report of the sector association [GroentenFruitHuis](#).

## 4. What makes the Netherlands an interesting market for fresh fruit and vegetables?

### The Netherlands is an important trade hub

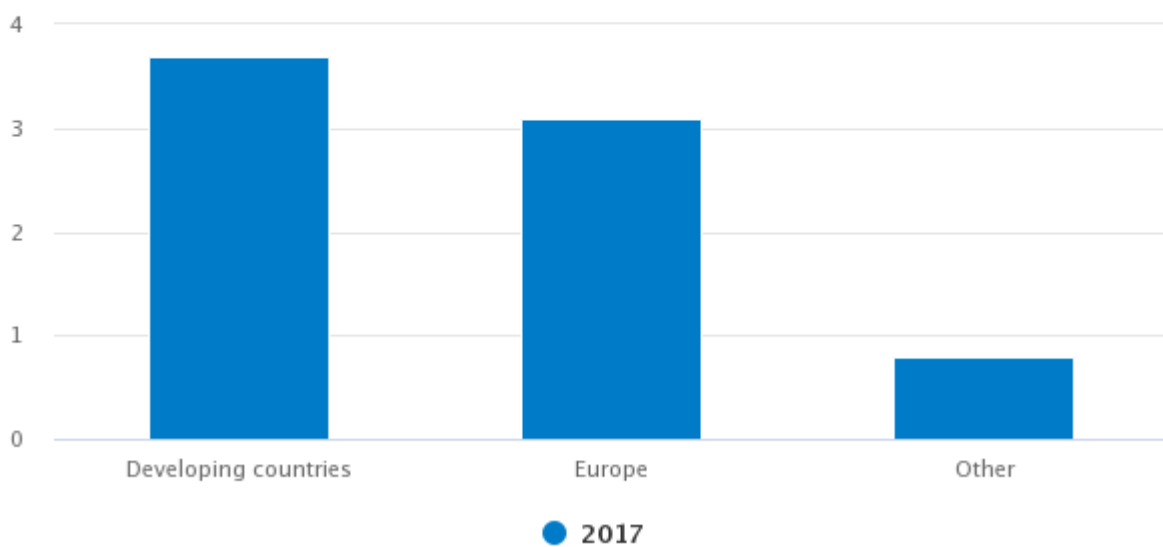
The Netherlands is the only country in northern Europe with a positive trade balance in fresh fruit and

vegetables. In 2017, the country imported €7.6 billion worth of fresh produce and exported €11.8 billion worth. More than 20% of Europe's imports of fresh fruit and vegetables were realised by the Netherlands. Developing countries play a significant role in the supply, especially of fresh fruit. This makes the Netherlands the most attractive trade hub in Europe.

The position of the Netherlands as a trade hub can be explained by its infrastructure, logistical advantage and the close collaboration between producers and service providers in the fresh fruit and vegetables business. Rotterdam is the largest seaport in Europe and you can find a large number of traders and wholesalers in its vicinity.

**Figure 1: Import of fresh fruit and vegetables in the Netherlands 2017**

in € billion



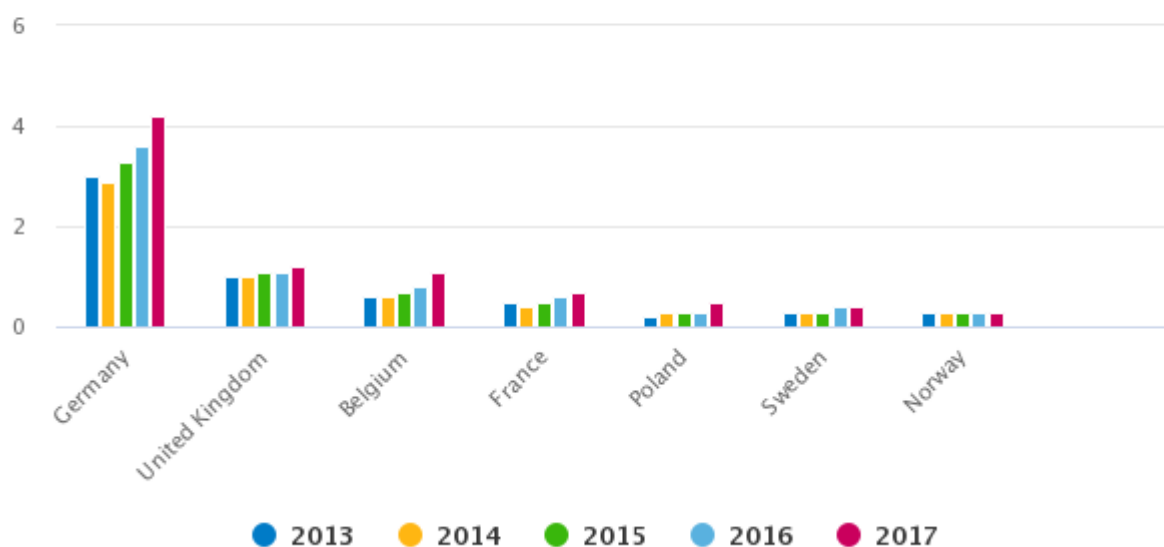
Source: ITC Trademap

### **Northern Europe is well connected**

The main destinations of Dutch produce and re-exports are countries in northern Europe, Germany being by far the largest. For these countries, the Netherlands is one of the key suppliers of imported tropical fruit as well as fresh vegetables (exotic and from local production). Common fruit, such as bananas, tends to be shipped directly to the final destination, but for exporters of more exotic varieties, Dutch traders offer an interesting distribution network in northern Europe.

Figure 2: Destination of export of fresh fruit and vegetables by the Netherlands 2013–2017

in € billion



Source: ITC Trademap

### Big in trade, small in consumption

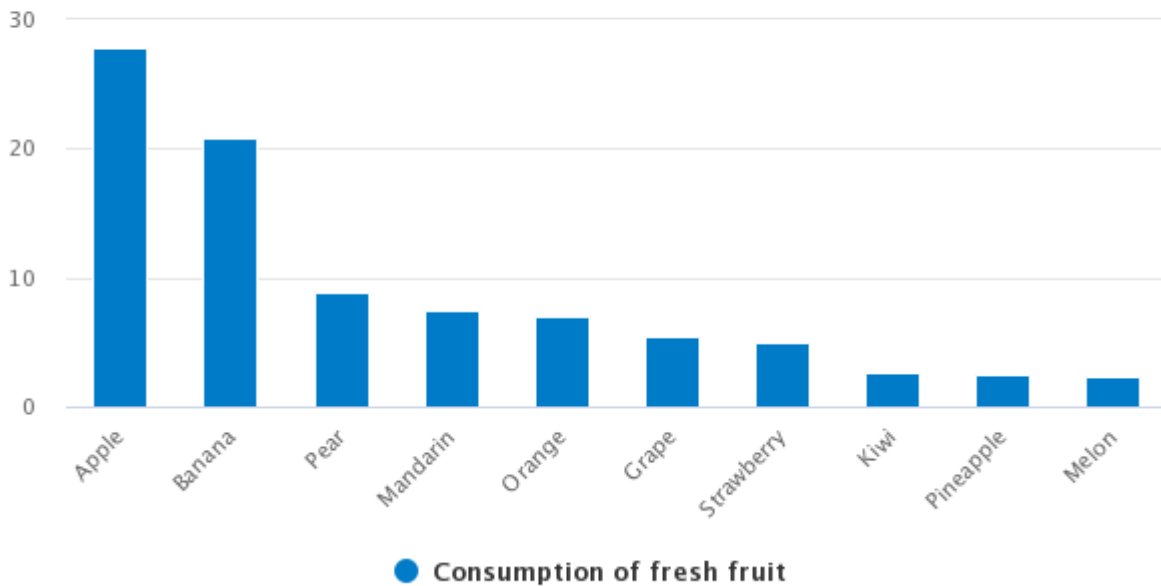
Although almost all types of fruit and vegetables are available on the Dutch market, the 10 most consumed fruits account for 80% of total consumption (see Figure 3). The average daily consumption is limited to only 127 grams of vegetables and 106 grams of fresh fruit. According to Eurostat (2014), only 54% of Dutch consumers eat fresh fruit on a daily basis, compared to 65.7% in Europe. This makes the consumption frequency in the Netherlands one of the lowest in Europe.

The total consumption value has gone up, but in volume it has shown a decline for several years, except in the consumption of fruit and vegetables by children. Public-private partnerships to promote fresh fruit and vegetables, for example by the sector association GroentenFruitHuis, are designed to turn the Dutch consumer around.

With 17 million inhabitants, the Netherlands is a mid-sized market in Europe. However, you will not find strong growth on the internal market in the Netherlands.

Figure 3: Most consumed fresh fruit in the Netherlands 2012–2014

in grams per person per day



Source: RIVM

### Tips:

Select Dutch business partners that can offer you a strong international network, or spread your client portfolio across Europe.

Avoid doing business with partners with similar end clients. In spite of the large size of the fresh fruit and vegetables industry in the Netherlands, many companies know each other and often compete for the same end clients.

## 5. What trends offer opportunities on the Dutch market for fresh fruit and vegetables?

### Dutch preference for convenience products

Together with the United Kingdom, the Netherlands is one of the most developed countries when it comes to convenience food. The Dutch consumer increasingly chooses the fast and easy option. For fresh vegetables, it is estimated that [22% has been pre-processed](#).

Convenience fresh fruit and vegetables include:

- Ready-to-eat fruit ([ripened avocados](#), mangoes)
- Seedless fruit ([grapes](#)), easy-peelers (citrus)
- Freshly cut fruit ([pineapple](#), melon, apple) and vegetables (onion, carrot) or [mixes](#)
- Snack fruit: small packages / varieties ([mini cucumber](#), blueberries, [baby tomatoes](#))
- Ready-made [salads](#)
- Ready-to-make meals and [soups](#) (fresh ingredients)
- Pre-cooked vegetables (potatoes, [corn](#), beetroot)
- Fresh juices (freshly made orange juice in the shop)

## Tips:

Offer different packaging options to your client and anticipate developments in convenience products. Using attractive packaging will also help distinguish your product.

Stay up to date with developments on the Dutch market by following international and Dutch news sources such as [AGF.nl](#) (in English: [Freshplaza](#)), [GFactueel.nl](#) and [Distrifood](#) (both in Dutch). You can also use some of these channels to promote your company and inform your buyers about your product development.

## Value for money and high standards

The quality and expectation level of fresh produce in the Netherlands is very high, but it is also a cost-efficient and competitive market. Dutch consumers are very much focused on value for money. By consequence, supermarkets often prize a long shelf life and a good-looking product over perfect taste.

If your products are marketed in a higher price segment, you have to make sure you focus on consumer experience. Marketing and branding are very important tools to increase awareness and differentiate your product. This can be seen, for example, in the presentation of the locally grown [honey tomatoes](#), [ready-to-eat avocados](#) with their “Eat Me” label, and premium-quality brands such as [Pink Lady apples](#).

Especially when dealing with experienced buyers who appreciate premium quality, you can distinguish yourself with superior quality and taste.

## Consumers expect a sustainable product

Dutch consumers expect you to have a sustainable approach to production and logistics. At the same time, they have difficulties in recognising sustainable products and put a lot of responsibility on the retailer. Buyers act on this by requiring transparency and certifications from your company. As a supplier, it is crucial to understand these requirements. Social and environmental certification schemes include actions to reduce and register the use of pesticides, focus on the safety and well-being of employees and limit the use of water.

An indication of the growing importance of sustainability is the increase in turnover in the Netherlands of products with sustainable labels from €258 million in 2015 to €319 million in 2016 ([Sustainable Food Monitor 2017](#)).

## Tip:

Read more about [which trends offer opportunities on the European fresh fruit and vegetables market](#) on the CBI market intelligence platform.

## Nearly 5% of fresh fruit and vegetables is organic

With the focus on sustainable and healthier products, the demand for organic fruit and vegetables continues to grow and has gained a market share of nearly 5%. According to the [Bionext trend report](#), the turnover of organic fresh produce in supermarkets grew in 2016 from €140.2 million to €148.4 million. Specialised retailers represent a stable turnover of €55 million. Organic sales through the food service channel are expected to increase.

Most organic supply comes from within Europe, but the growing demand will also create opportunities for non-

European growers. However, you must be able to produce according to strict European standards. Organic products are recognisable by the labels [EU organic](#), [EKO](#) or [Demeter](#) for biodynamic products:



### Tips:

Consider organic as a plus, not as a must, and be prepared to comply with the entire organic process. Remember that implementing organic production and becoming certified can be expensive.

Read more about organic growth and requirements in the Netherlands on the websites of [Bionext](#) (in Dutch) and control body [Skal](#).

Find companies that specialise in organic produce that understand this niche market and have access to it. Use databases such as [Organic-Bio](#) or visit the trade fair [Biofach](#) in neighbouring Germany.

## 6. What requirements must fresh fruit and vegetables comply with to be allowed on the Dutch market?

The Netherlands complies with European legal standards and requirements. For a complete overview of these standards, refer to the CBI's [buyer requirements for fresh fruit and vegetables](#) or consult the specific requirements for your product in the [EU Trade Helpdesk](#).

### Fewer pesticides than required by European legislation

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers in the Netherlands. The European Union has set a legal limit of [maximum residue levels \(MRLs\)](#), and regular safety inspections are carried out by the Dutch authority [NVWA](#). However, in the main trade relations in the Netherlands the commercial rules have become stricter than the existing legislation.

Most Dutch supermarkets require your product to comply with a residue level of only 50% of the legal limit. Lidl, a German discounter active in the Netherlands, even goes as low as 33%. This means you have to control your production process very precisely.

### Tips:

Use the European [MRL database](#) to find out the MRLs that are relevant for your product. You can search the database for your product or the pesticide used and find a list of the MRLs associated with your product or pesticide.

Reduce the amount of pesticides by applying [integrated pest management \(IPM\)](#) in production. IPM is an agricultural pest control strategy that includes growing practices and chemical management.

Always check with your buyers if they have additional requirements on MRLs and pesticide use.

## GLOBALG.A.P. and HACCP are a pre-condition

Since food safety is a top priority, [GLOBALG.A.P.](#) certification and a [HACCP](#)-based food management system (for example [BRC](#) or [IFS](#)) are the minimum standards for selling fresh fruit and vegetables in the Netherlands.

The fact that Dutch importers conduct their business throughout Europe also increases the pressure to obtain other specific certifications, depending on the final destination and sales channel. Dutch companies confirm that a lot of their attention goes to checking certifications, managing paperwork and sourcing the right product for the right market. As a foreign supplier, you can use the experience of your Dutch partner to understand the specific needs for other markets.

### Tips:

Always remember that food safety is a major issue. Work proactively with buyers to improve food safety, be transparent and remain up to date with regard to buyer requirements and regulations.

For a complete overview of buyer requirements and international standards, see the [buyer requirements for fresh fruit and vegetables](#) on the CBI marketing intelligence platform.

## The Netherlands leads the way to sustainability

In 2012, [IDH](#) and 13 Dutch retailers and traders launched the [Sustainability Initiative Fruit and Vegetables](#) (SIFAV). Today, SIFAV has become a pan-European initiative with over 40 partners, all committed to the objective of making the procurement of fruit and vegetables from Africa, Asia and South America 100% sustainable by the year 2020. In the Netherlands, sustainable and social compliance is already a must:

This means that your product needs to comply with at least:

- one environmental standard (for example Organic or GLOBALG.A.P.);
- one social standard (for example BSCI, Sedex Smeta or Fair for Life).

All standards must be recognised by the [Global Social Compliance Programme](#) (GSCP) and can be found in the [SIFAV Basket of Standards](#).





Source: IDH SIFAV

For international channels, your Dutch client may sometimes prefer other social standards, such as [GRASP](#), which is part of GLOBALG.A.P. GRASP is relatively easy to access, but not recognised by SIFAV or GSCP.

On a national level, the environmental label [PlanetProof](#) will become the new sustainable standard. PlanetProof is primarily focused on Dutch and possibly European growers and has already received the commitment of several retailers.

### Tips:

Examine your company's current performance, for example by completing a self-assessment on the [Amfori/BSCI website](#).

Find more information about supermarket approaches on sustainability in the [2018 investigation into sustainable fruit and vegetables in supermarkets](#) (in Dutch) by the Consumentenbond, the Dutch consumer organisation.

## 7. What competition will you be facing on the Dutch fruit and vegetables market?

### Competition from greenhouse producers

Horticulture is a Dutch specialty and takes place in almost 10,000 hectares of high-tech greenhouses. Production costs are high, but it gives growers a great advantage of a controlled environment and great

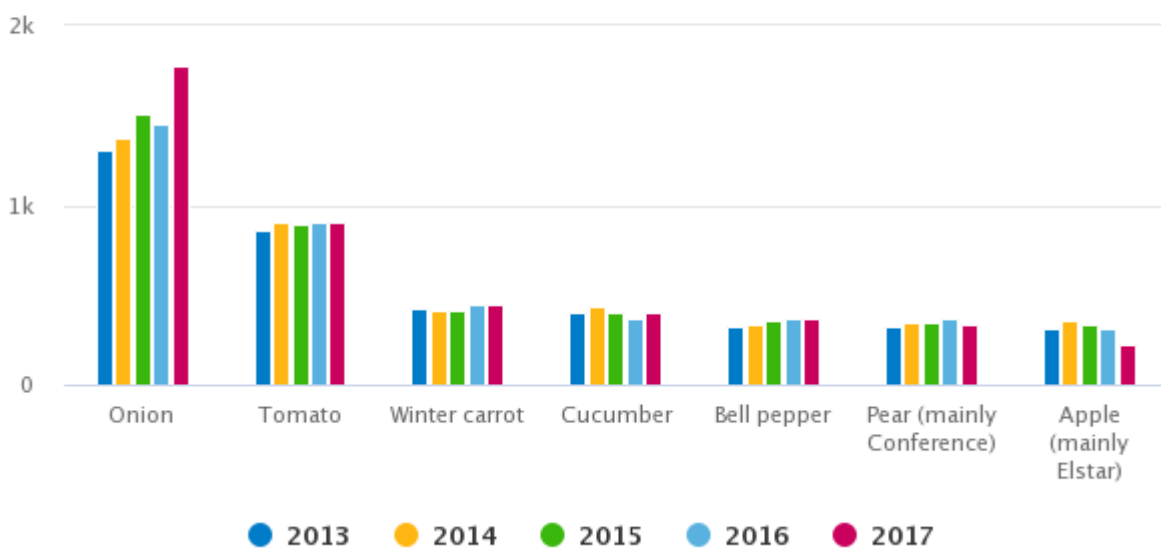
efficiency. There are [six 'greenports'](#) that define the main production areas.

The main local competition comes from vegetables such as onions, tomatoes, carrots, cucumber and bell peppers. In 2016, the production of vegetables reached 5 million tonnes, while fruit accounted for 0.8 million tonnes.

Many of the greenhouse products are available all year round, leaving limited opportunities for imports. Your best chances as a foreign supplier lie with varieties (mainly tropical fruit) that cannot be produced in the Netherlands.

**Figure 4: Production of fresh fruit and vegetables in the Netherlands 2013–2017\***

in 1,000 tonnes



Source: Central Bureau for Statistics (CBS)

\* Statistics 2017 are preliminary figures

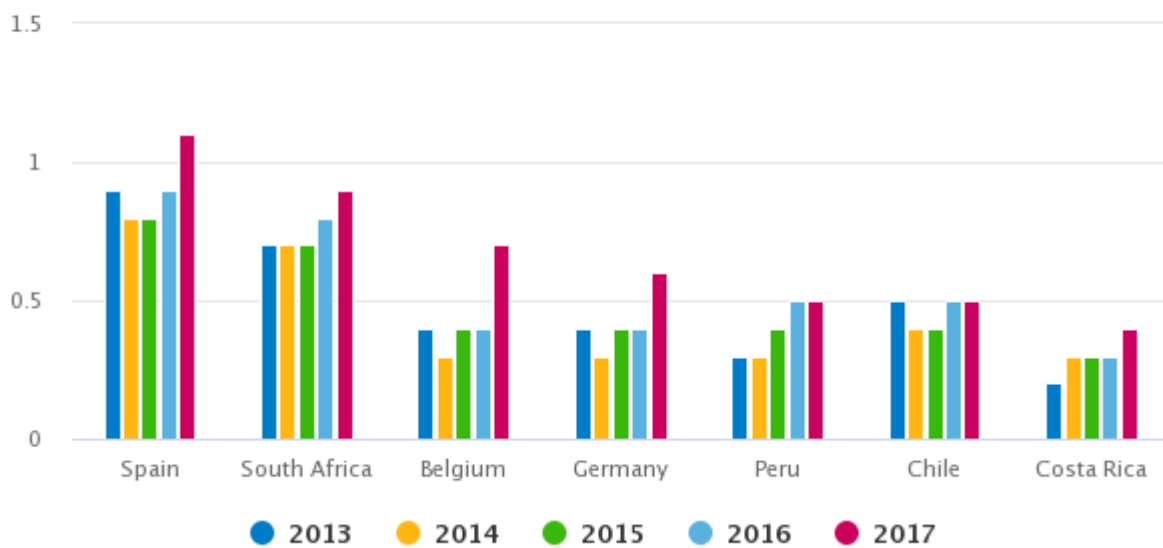
## The Netherlands has many suppliers

Due to the fact that the Netherlands is a logistical trade hub for mainland Europe, a large variety of countries supply to it. South Africa, Peru and Chile are the biggest suppliers outside Europe, followed by Costa Rica, which mainly exports bananas and pineapples to the Netherlands. Importers favour the supply from nearby producing countries such as Spain when available.

You can interest Dutch importers with supply from a new country of origin that fits well within the gaps between seasons. For example, there is interest in mangoes from western Africa because of its close proximity to Europe and avocados from Colombia because their season fills a supply gap. However, these countries or regions more often than not lack proper infrastructure, reliability and quality packing. In countries where trade relations are already well established and that produce large volumes, it becomes more difficult for new exporters to enter the market.

Figure 5: Origin of imports of fresh fruit and vegetables by the Netherlands 2013–2017\*

in € billion



Source: ITC Trademap

\* Statistics 2017 are preliminary figures

### Tips:

Study the supply cycles as well as your seasonal competitors and check if your product could fill a supply gap. The websites of Dutch importers are often very transparent about the origin of their product and sometimes even show calendars.

### Trade flows are changing

One of the main concerns of traders and retailers in the Netherlands is the availability of affordable (and sustainable) products. Climate change and the upcoming demand in Asia, mainly China, can have a great impact on current trade flows. China is generally less strict when it comes to social and environmental compliance.

With relatively high prices and often fewer requirements, China competes for imports of fresh produce with the Netherlands. This means that supplying the Netherlands (and Europe) is not always the best option for profit, although it ensures a steady market and large volumes.

As a result, the traditional Dutch trade with consignment and high margins is disappearing. Dutch companies increasingly work in partnerships, becoming more involved in the primary production.

### Tip:

Focus on a combination of export markets: The Netherlands or Europe can give you supply certainty while Asia offers growth opportunities.

## 8. Which trade channels can you use to put fresh fruit and vegetables on the Dutch market?

### Supermarkets form the main channel

Most fresh fruit and vegetables in the Netherlands are eventually sold by supermarkets, which have a market share of 77% for fresh fruit and 89% for fresh vegetables. The number of shops specialised in fresh fruit and vegetables is gradually declining. It is nearly impossible to deal with the Dutch market without taking into consideration the large volumes and strict requirements of supermarkets.

The main supermarkets are:

- [Albert Heijn](#) (35%)
- [Jumbo](#) (19%)
- [Lidl](#) (10%)

The central purchase organisation [Superunie](#) represents another 29% with 13 associated supermarkets.

Online sales by these supermarkets are also developing rapidly. Dutch consumers like the convenience of home shopping, which has led to the first fully online supermarket [Picnic](#) with free delivery. Competition among supermarkets is high and as a supplier you must deal with a constant demand to keep prices low.

Together with a service provider as your partner, you can become part of a retail supply programme, but price guarantees are rare. Most supermarkets determine prices on a weekly basis. The exception is [Ekoplaza](#), a supermarket for organic products with a greater focus on long-term cooperation and price guarantees.

Figure 6: Market share in fresh fruit sales in the Netherlands



Source: Detailhandel.info

### Sourcing companies require a direct relation with growers

Importing wholesalers and service providers in the Netherlands are specialised in sourcing fresh products according to the requirements of specific clients. Products that do not comply are rejected or sold on the spot market. Efficient sourcing requires transparency and control over the supply chain, which is why most Dutch companies value a direct relation with the grower.

Most of these companies are located near (former) [wholesale markets](#) in the south-west of the Netherlands. The companies that form part of retail supply programmes are often large and offer a range of pre-packaged products and solutions. They prefer working with medium-sized or large, well-organised suppliers. Smaller companies tend to be more specialised.

### Tips:

Establish partnerships with service providers that can strengthen your position and help you to enter major retail programmes. Also see the [CBI tips for finding buyers on the European fresh fruit and vegetables market](#).

Build a long-term strategy and find a way to become part of a (retail) supply programme. If you are not able to do this, make sure you have alternative markets to supply.

## 9. What are the price levels for fresh fruit and vegetables in the Netherlands?

According to [Eurostat](#), the prices for fresh fruit and vegetables are 9% above the European average, but generally lower than in most northern European countries.

Trade prices must be very competitive, as most of the products are re-exported.


As an exporter, you have to be aware that there is not always a direct relation between trade prices and consumer prices.


### Tip:


Find information about consumer prices in the online assortment of supermarket chains such as [Albert Heijn](#), [Jumbo](#), [PLUS](#) and [Ekoplaza](#) (organic).

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