

The Dutch market potential for cocoa

The Netherlands is the largest importer of cocoa beans and home to the largest cocoa grinding industry in the world. The Netherlands imported almost 92% of its cocoa beans from West Africa in 2018, primarily as bulk cocoa. The demand for high-quality cocoa, however, is growing and attracting further interest in cocoa beans from Latin American countries.

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1. Product description

The cocoa tree (*Theobroma cacao*) grows in tropical areas between 15 and 20 degrees latitude north and south of the equator in Africa, Asia and Latin America. Cocoa pods grow directly from the trunk and thicker branches of the tree. After extraction from the pod, cocoa seeds (beans) are fermented and (sun) dried. A cocoa producing tree can deliver on average 7-9 kg of dry beans per year.

The three main varieties of the cocoa tree as distinguished by the international cocoa market are the following.

1. *Forastero* is the predominant cocoa variety. It is mainly cultivated in Africa, but also in Central and South America. It accounts for around 80% of global cocoa production. *Forastero* grows faster and gives a higher yield than other cocoa varieties. The beans have a strong, earthy flavour. Generally, bulk cocoa beans come from *Forastero* trees. Well-known *Forastero* subspecies are *Amelonado* and *Nacional*. *Nacional* trees in Ecuador produce fine flavour cocoa.
2. *Criollo* (original cocoa tree) is mainly grown in Central America, northern South America, the Caribbean and Sri Lanka. *Criollo* makes up around 5% of global cocoa production. The beans have a delicate and sweet flavour. *Criollo* is often mixed with other varieties when making chocolate, given that it is scarce and expensive. Fine flavour cocoa beans are produced from *Criollo* cocoa trees. Well-known varieties are *Chuafo*, *Porcelana* and *Ocumare*.
3. *Trinitario* is mainly cultivated in Central and South America, the Caribbean and Asia. The beans are a hybrid of the *Criollo* and *Forastero* trees. This variety represents around 10-15% of global cocoa production. The beans have a floral, fruity flavour. The cocoa beans from *Trinitario* trees are classified as fine flavour cocoa. There are exceptions, however, as Cameroonian cocoa beans produced from *Trinitario* trees are classified as bulk cocoa beans. Well-known varieties are *Carenero*, *Rio Caribe* and *Sur del Lago*.

The focus of this document is on cocoa beans (whole or broken, raw or roasted), which corresponds with HS code 1801. Harmonised System (HS) codes are used to classify products and to calculate international trade statistics, such as imports and exports.

Cocoa bean derivatives (cocoa paste, cocoa butter and cocoa powder) are covered in [our study on semi-finished cocoa products in Europe](#).

2. What makes the Netherlands an interesting market for cocoa?

The Netherlands is an important cocoa trade hub within Europe. It is the world's largest cocoa bean importer, as well as the world's largest cocoa-processor. The Netherlands is an important re-exporter of cocoa beans and semi-finished products to other European destinations.

The Netherlands is the largest importer of cocoa beans worldwide

The Netherlands is the largest importer of cocoa beans in the world. In 2018, Dutch imports amounted to 1,173 thousand tonnes, at a value of €2.3 billion. Of these imports, 98% was sourced directly from producing

countries. This is 57% of total direct imports by Europe.

The total volume of imports of cocoa beans by the Netherlands increased by an annual average of 16% between 2014 and 2018. At the same time, the import value increased at an average annual growth rate of 13%. Globally, and mainly in Africa, cocoa production increased, which explains the higher import volumes of the Netherlands.

Cocoa beans enter the Netherlands via [the port of Amsterdam](#), the largest cocoa port in the world. The port has extensive and well-equipped import, storing and cocoa processing facilities, and the area houses many actors active in the cocoa value chain. The Netherlands [is expected to continue to play an important role in the cocoa trade](#), due the port and region's expertise, concentration of facilities and actors, its focus on sustainability and its flexibility to innovate. Companies specialised in storage of cocoa beans in the Netherlands are, for instance, [Commodity Centre Netherlands](#), [CJ Hendriks group](#) and [C. Steinweg Group](#).

The Netherlands houses the world's largest cocoa-grinding industry

The cocoa-grinding industry in the Netherlands is the world's largest, and consumed an estimated 595 thousand tonnes of cocoa beans between 2017 and 2018. Cocoa-grinding activities in the Netherlands increased by 5.3% in the same period. [While the entire European cocoa grinding industry continues to grow](#), grinding activities in producing countries is also growing. This is [especially the case in Ivory Coast](#), which houses the world's second largest cocoa grinding industry, with a consumption of 559 thousand tonnes of cocoa between 2017 and 2018. Grinding at origin is a cost-reduction strategy of large multinationals.

The Dutch cocoa grinding industry is located near [the port of Amsterdam](#). It houses multinationals such as [Olam](#) and [Cargill](#), as well as Dutch companies like [Dutch Cocoa](#), [Daarnhouwer](#) and [Theobroma](#) (ECOM Group). These companies play an important role in both importing and producing cocoa derivatives.

The Netherlands is a key trade hub for cocoa and semi-finished cocoa products within Europe

The Netherlands is the largest exporter of cocoa beans in Europe. Dutch exports increased slightly between 2014 and 2018, with an average annual increase of 1.3% in volume and 0.1% in value. The Netherlands had a market share of 54% in total European re-exports in 2018.

Germany is the most important destination of Dutch re-exports, with a market share of 65% in 2018, at 155 thousand tonnes. Austria holds second place, receiving nearly 11% of total Dutch exports, at 25 thousand tonnes. Re-exports to Germany decreased at an annual average rate of 4.5% in volume between 2014 and 2018, while re-exports to Austria increased at an average annual rate of 48% since 2014.

The Netherlands is Europe's largest exporter of semi-finished cocoa products, reaching an export value of 706 thousand tonnes in 2018, at a value of €2.3 billion. Between 2014 and 2018, Dutch exports increased at an average annual rate of 3.6% in volume and 2.1% in value. When it comes to the export of chocolate products, the Netherlands is Europe's third largest exporter, only behind Germany and Belgium. The export volume of chocolate products increased by 2.6% in volume and 5.2% in value between 2014 and 2018.

Tips:

If you use Chrome as a web browser, read [here](#) how you can translate this study, or any of the articles referred to in this study, into another language.

Have a look at the website of [the port of Amsterdam](#) to learn more about the port itself and cocoaspecific opportunities.

See the website of the [Dutch Confectionery Industry Organisation](#) for more information about the chocolate industry in the Netherlands.

Access the [EU Trade Helpdesk](#) to analyse European and Dutch trade dynamics yourself and to build your export strategy. By selecting the Netherlands as your reporting country, you will be able to follow developments such as the emergence of new suppliers and the decline of established ones.

See our study of [trade statistics for cocoa](#) for more detailed information about the European trade in cocoa beans.

3. Which trends offer opportunities on the Dutch market?

The Dutch are moderate chocolate consumers, while showing a growing interest in high-quality chocolate and interesting new flavour combinations. The Dutch market is characterised by an increasingly strong focus on sustainability.

Dutch consumers increasingly buy high-quality chocolate

There is an [increasing demand for high-quality and dark chocolate on the Dutch consumer market](#), for which consumers are willing to pay a higher price. For instance, private label brand [Delicata \(by Albert Heijn\)](#) now offers a wide range of pure chocolate bars from specific origins, indicating the growing importance of this concept on the mainstream market. In 2019, Cargill launched its premium chocolate brand [Veliche Gourmet](#) for artisans in the Netherlands.

The increasing popularity of high-quality chocolate has also [led to a sharp increase of bean-to-bar producers in the Netherlands in recent years](#). Over the past ten years, the number of small chocolate makers in the Netherlands (with less than 10 employees) has more than doubled, amounting to 445 companies in 2019.

While the Netherlands is not particularly famous for its gourmet chocolate shops, [the number of chocolate shops has been growing significantly the past decade](#). Examples of high-end chocolate shops in the larger Dutch cities are, for instance: [Cacao](#), [De Bonte Koe](#), [De Lelie](#), [Chocolaterie Pierre](#) and [Chocolatl](#).

Sustainability is key on the Dutch cocoa and chocolate market

Although Dutch consumers are primarily guided by taste (89%), [more than half of all Dutch consumers value sustainability in chocolate products they purchase in supermarkets](#). In 2016, [around 86% of all chocolate products sold in Dutch supermarkets was certified](#). The production of chocolate [free from child labour or slavery, which is also fair trade, are the most important topics](#) for consumers.

The most popular certifications on the Dutch chocolate market are [Rainforest Alliance](#) (merged with [UTZ](#)) and [Fairtrade](#). Many Dutch mainstream brands are certified by one of these organisations. Both UTZ and Fairtrade originated in the Netherlands. Especially the demand for fair-trade chocolate is growing significantly; [in 2018 alone, it grew by 23%](#).

While organic certification is still a niche market for the chocolate industry, it is becoming more important in the food industry in general. [The Netherlands is Europe's seventh largest organic market](#), with an estimated value of €1.9 billion in 2017. The Dutch organic market is [expected to grow at an average annual rate of 3.7% between 2017 and 2022](#). In Western Europe, the organic markets of Germany, France, the United Kingdom, Italy and Sweden surpass the Netherlands in size. Within the chocolate market, examples of Dutch organic chocolate brands include [Chocolatemakers](#) and [Lovechoc](#). The main certification schemes include [EKO](#) and [EU Organic](#).

In 2018, the Dutch government and cocoa and chocolate industry players in the Netherlands committed to the

sector-wide [Cocoa Origins](#) programme, with the goal of reaching 100% sustainable cocoa consumption in the Netherlands by 2025. The largest Dutch retailer Albert Heijn signed a partnership with chocolate manufacturer Barry Callebaut [to make the production of its private label chocolate *Delicata* fully traceable from 2019](#).

Dutch consumers are increasingly interested in innovative flavour combinations

The Netherlands had an estimated annual chocolate consumption of [5.1 kg per capita in 2017](#). Compared to other European countries, Dutch per capita consumption of chocolate is relatively low. Examples of larger European chocolate consumers are Switzerland (10.5 kg per capita) and Germany (9.2 kg per capita).

Chocolate bars are especially popular in the Netherlands, of which sales [increased by 20% between 2013 and 2018](#). Within the chocolate bar category, there is [an increasingly diverse offer of innovative ingredient combinations](#). The largest and most popular Dutch chocolate brand [Tony's Choclonely](#) offers such chocolate bars with a range of ingredient combinations, such as sea salt, popcorn and spices. The brand combines these ingredients to social impact concepts: [slave-free chocolate](#) and fair trade. Another Dutch brand offering similar products is [Johnny Doodle](#). Mainstream Dutch chocolate brands are now also launching chocolate bars with new flavour combinations, such as [Verkade](#) and retailer Albert Heijn's private label [Delicata](#).

Demand for healthier chocolate bars is growing in the Netherlands

Dutch consumers are increasingly looking for healthier products. For example, the confectionery industry is responding to this trend by increasingly using natural sweeteners in chocolate (such as stevia and agave). There is also an increasing demand for vegan (raw) chocolate, dark chocolate and chocolate products with ingredients that are perceived as healthy. For instance, [chocolate bars with avocado or matcha are growing in popularity](#). The Netherlands is one of the first markets in Europe where [Nestlé introduced its KitKat Green Tea Matcha chocolate in 2019](#).

Tips:

See [our study on trends for cocoa](#) to learn more about current trends on the European market.

Promote sustainable and ethical aspects of your production process. Support these claims with certification. See [our study on doing business with European buyers of cocoa](#) for more tips on marketing and promotional aspects of your cocoa.

Before engaging in a certification programme, make sure to check (in consultation with your potential buyer) that this label has sufficient demand in your target market and whether it will be costbeneficial for your product.

Find potential business partners in the Netherlands by checking the lists of [Fairtradecertified operators](#), [Dutch Rainforest Alliancecertified brands](#), [UTZ certified cocoa supply chain actors](#) and [organic chocolate producers](#).


Focus on the premium, specialty, and fine flavour cocoa market in the Netherlands. You can only access the premium cocoa market if you offer highquality cocoa. See the chapter about quality requirements below to learn more.

Want to put premium cocoa on the Dutch market? Try to establish direct trade relationships with smaller traders and chocolate makers.


This study has been carried out on behalf of CBI by [ProFound – Advisers in Development](#).

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