

# Entering the Dutch market for fresh fruit and vegetables

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In the Netherlands, you will find a diverse group of importers and traders with international networks. They partner with strong suppliers in competitive countries such as Peru and South Africa. To supply Dutch buyers, you need to be well prepared in terms of legal requirements regarding pesticide residues, but also in terms of quality, supply security and sustainability. Supermarkets dominate the sales of fresh produce in the Netherlands, so there are strict controls.

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## 1. 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 using [Access2Market](#).

### What are mandatory requirements?

#### 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 for [maximum residue levels \(MRLs\)](#). Regular safety inspections are carried out by the Dutch authority [NVWA](#).

The Netherlands has a distribution function to other European countries, including some of the strictest ones in terms of pesticide residues. The required residue limits are often lower than the legal limits. This depends on the final destination and end client. Germany is one of the main export markets for Dutch traders and one of the strictest in terms of pesticide residues.

Most Dutch supermarkets require your product to comply with a residue level of only 50% of the legal limit. To supply Lidl, a discounter of German origin, residues must not exceed 33% of the legal limit. This means you have to control your production process very precisely.

### Tips:

Find out the MRLs that are relevant for your product by [consulting the EU MRL database](#). In here, all

harmonised MRLs can be found. You can search on products or pesticides used. The database shows the 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.

Read more about [MRLs on the website of the European Commission](#). Check with your buyers if they have additional requirements on MRLs and pesticide use.

Make sure that contamination of lead and cadmium remain within the limits as well, according to the [maximum levels for certain contaminants in foodstuffs](#).

## Follow phytosanitary regulations

Phytosanitary import requirements of the Netherlands are directly based on the plant health regime of the European Community and its member states.

From December 2019, the new European regulation for the [trade in plants and plant products from non-EU countries](#) went into force. This regulation requires most fruit and vegetables to have a phytosanitary certificate before being brought into the European Union, guaranteeing that they are:

- properly inspected;
- free from quarantine pests, within the requirements for regulated non-quarantine pests and practically free from other pests;
- in line with the plant health requirements of the EU, laid down in [Implementing Regulation \(EU\) 2019/2072](#).

For pineapple, banana, coconut, durian and dates, no phytosanitary certificate is required for export to the European Union.

### Tips:

Make sure your plant health authority is able to comply with the phytosanitary requirements before planning your export. Get in contact with the [National Plant Protection Organisation \(NPPO\)](#) in your country and make sure they can issue a phytosanitary certificate on time.

Read which additional declaration is needed on the phytosanitary certificate for fruit and vegetables in [the document of the Dutch food safety authority NVWA](#).

## Maintain high quality standards

The European [Regulation \(EU\) No. 543/2011](#) lays down detailed rules for fruit and vegetables. The regulation describes specific marketing standards for apples, pears, citrus, kiwifruit, strawberries, peaches and nectarines, table grapes, strawberries, tomatoes, sweet peppers and lettuces, curled-leaved and broad-leaved endives. For other fruit and vegetables, the general marketing and quality standards apply (see Table 1).

For many types of fruits and vegetables, you can also find marketing standards or guidance at:

- The [Fresh Fruit and Vegetables - Standards](#) of the United Nations Economic Commission for Europe (UNECE)

- The [OECD Fruit and Vegetable Scheme](#) of the Organisation for Economic Co-operation and Development (OECD)
- The [International Food Standards](#) in the FAO Codex Alimentarius

The Netherlands almost exclusively requires class I fruit and vegetables as a minimum. The Quality Control Bureau ([KCB](#)) is the Dutch authority that is responsible for the quality inspection of fruit and vegetables on international trade, and at the wholesale and producer level. The Netherlands Consumer Authority ([NVWA](#)) is responsible for inspections at the retail level.

Table 1: General quality requirements and permissible tolerances for fruit and vegetables

General quality requirements (all classes)
<ul style="list-style-type: none"> <li>• intact</li> </ul>
<ul style="list-style-type: none"> <li>• sound; produce affected by rotting or deterioration such as to make it unfit for consumption is excluded</li> </ul>
<ul style="list-style-type: none"> <li>• clean, practically free of any visible foreign matter</li> </ul>
<ul style="list-style-type: none"> <li>• practically free from pests</li> </ul>
<ul style="list-style-type: none"> <li>• free from damage caused by pests affecting the flesh</li> </ul>
<ul style="list-style-type: none"> <li>• free of abnormal external moisture</li> </ul>
<ul style="list-style-type: none"> <li>• free of any foreign smell and/or taste.</li> </ul>
<p>A tolerance of 10% by number or weight of product not satisfying the minimum quality requirements shall be permitted in each lot. Within this tolerance not more than 2% in total may consist of produce affected by decay.</p>
<p>The development and condition of the fruit or vegetable must be such as to enable them to withstand transportation and handling and to arrive in satisfactory condition at the place of destination.</p>

Source: [Commission Implementing Regulation \(EU\) No. 543/2011](#)

### Tips:

Discuss specific requirements with your buyer: size, quality, packing, branding etcetera. Make sure the product is uniform in size and quality.

Maintain a perfect cold chain to ensure optimal freshness and taste. Supply chain logistics should not affect the product taste in any significant way.

Maintain strict compliance with quality requirements and deliver the quality as agreed with your buyer. Being careless with product requirements or stretching the minimum standards will give buyers a reason to claim on quality issues.

Be open and transparent when resolving issues and dealing with quality claims. Remember that international traders in the Netherlands can sometimes help finding an alternative market if products are not suitable for stricter clients.

Read the [CBI Buyer Requirements for fresh fruit and vegetables](#) for additional requirements such as packaging and labelling, or the [product studies](#) for product-specific requirements.

## What additional requirements do buyers often have?

### Maintain good communications

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 Dutch client to do business with you is by having a well-organised and certified company, and by being proactive in your communication. Never leave a message unanswered and communicate pro-actively when issues occur.

#### Tip:

See [CBI Buyer Requirements for fresh fruit and vegetables](#) and the [Tips for doing business with European buyers](#) for other or additional requirements such as payment and delivery terms.

### Obtain commonly used certifications

Common certifications for fresh fruit and vegetables are [GlobalG.A.P.](#) for good agricultural practices and [BRCGS](#), [IFS](#) or similar HACCP-based food safety management systems for packing and processing facilities. Management systems recognised by the [Global Food Safety Initiative \(GFSI\)](#) are most recommendable to use.

### Apply additional sustainability and social standards

Complying with sustainable and social standards has become common for all fresh fruit and vegetables. Besides GlobalG.A.P. to ensure good agricultural practices, a social certificate such as Sedex Members Ethical Trade Audit ([SMETA](#)) has almost become a minimum requirements to get your product up to retail standards.

Retailers can also impose their individual standards or requirements. For example, the leading Dutch supermarket Albert Heijn has its own protocol and [minimum product requirements regarding social compliance & the environment for own brand products](#). In addition to GlobalGAP, they require all fruit and vegetables produced in a BSCI high-risk country to be certified with BSCI or equivalent according to social certification standards.

#### Tip:

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

## Sustainability Initiative Fruit and Vegetables (SIFAV)

Several Dutch companies joined the [Sustainability Initiative Fruit and Vegetables \(SIFAV\)](#). This is a covenant that actively contributes to a more sustainable fresh fruit and vegetable supply chain regarding economic, environmental, and social impacts.

Among the sustainability targets towards 2025 are a 25% reduction of the carbon footprint and food waste in priority products, implementation of water standards and the first steps towards improving living wages.

The Dutch companies that are SIFAV members are: Jaguar, Levarht, Nature's Pride, Eosta, FV Seleqt, the Greenery, HillFresh, Van Oers, Yex, Bakker Barendrecht and BerriesPride, as well as retailers Jumbo and Albert Heijn. These companies are frontrunners in making the supply chain sustainable.

### Tip:

Implement at least one environmental and one social standard. See the [Basket of standards](#) of SIFAV Sustainability Initiative for Fruit and Vegetables.

## On the way to PlanetProof

'[On the way to PlanetProof](#)' is a new independent quality mark for more sustainable products. It is the fastest-growing sustainability label in the Netherlands. Fresh fruit and vegetables are one of the main sectors.

Currently the label is only active across Western and Southern Europe. However, PlanetProof has been acknowledged by the Global Ecolabelling Network (GEN) as a reliable ecolabel. This means it can collaborate worldwide with other ecolabels in order to have a greater impact on sustainability.

## Sustainable packaging

The Netherlands launched a [Plastic Pact](#) in February 2019 to make packaging more sustainable and re-usable. The pact was signed by 96 parties, including manufacturers, retailers and the Ministry of Infrastructure and Water Management (IenW). Together they agreed on 4 objectives for 2025:

- single-use plastic products and packaging will be 100% recyclable;
- 20% less plastic packaging through, among other things, greater reuse;
- at least 70% of single-use products and packaging will be recycled;
- these products will comprise at least 35% recycled plastic.

The branch organisation [Fresh Produce Centre](#) has worked out a specific plan for sustainable packaging in the fresh fruit and vegetable sector. Its members account for over 80% of total sales of fruit and vegetables in the Netherlands. The Branch Plan Sustainable Packaging has established the following goals for the fruit and vegetable sector (in short):

- reduce packaging material used per kilogram of product sold by 15% in 2022 and 25% in 2025, compared with 2017;
- make 90% of the packaging used to be recyclable in 2022, and 100% in 2025;
- only use mono materials made from raw materials with the lowest possible environmental impact;

- use reusable transport packaging (in the Netherlands) that is filled as efficiently as possible;
- communicate the efforts and the purpose of packaging to users and consumers.

As a foreign supplier, you must select package materials that are in line with the ambitions to reduce waste. This especially applies to exporters that pre-pack fruit and vegetables, such as grapes in clamshells or freshly packed herbs.

## The European Green Deal

In the coming years, the [European Green Deal](#) will influence how resources are used and greenhouse gas emissions are reduced. The new EU policies on sustainability will prepare Europe in becoming the first climate-neutral continent by 2050.

The [Farm to Fork Strategy](#) is at the heart of the European Green Deal aiming to make food systems fair, healthy and environmentally friendly. It will ensure a sustainable food production and address for example packaging and food waste. Several EU trade agreements with fruit and vegetable-supplying countries already include rules on trade and sustainable development – other countries are expected to follow. For suppliers of fresh fruit and vegetables, it is important to look ahead of the increasing standards and try to be in the frontline of the developments.

In the Netherlands, there are concerns that sustainability measures will come at the expense of the production power of the country. A smaller production from, for example, apple and pear orchards and the greenhouse horticultural sector means there may be more opportunities for foreign producers.

### Tips:

Be selective in choosing your packaging materials. Find the most sustainable option and only use recyclable, or preferably biodegradable plastics. When you pack for retail clients, make sure to do this in close cooperation with your buyer.

Download the [Summary Branch Plan Sustainable Packaging](#) of the Fresh Produce Centre to read more about the sector's ambitions to reduce unsustainable packaging.

## What are the requirements for niche markets?

### Use organic certification to increase product value

Organic certification can be an interesting way to set your products apart and market them at a higher value. The demand for organic fruit and vegetables is growing, although it is mainly met by European growers.

In order to market organic products in the Netherlands, you must use organic production methods according to [European legislation](#) and apply for an organic certificate with an accredited certifier. Please note that from January 2022 the new legislation and [Regulation \(EU\) 2018/848](#) will come into force.

Organic products in the Netherlands are recognisable by the labels [EU organic](#), [EKO](#) or [Demeter](#) for biodynamic products. [Skal](#) is the control body for organic certification in the Netherlands. The organic [EKO label](#) includes social standards on top of the EU organic requirements. But it is not a common label that is demanded from foreign suppliers. Organic products that are re-exported sometimes need to comply with an additional national organic standards, such as [Naturland](#) in Germany, [BioSuisse](#) in Switzerland or [KRAV](#) in Sweden.

Figure 1: EU organic label, the EKO label and Demeter logo for biodynamic products are all indications for an



### Tips:

Strive for residue-free fruit and vegetables and certify your production as organic if possible. It will broaden your market opportunities, but remember that implementing organic production and becoming certified can be expensive. You must be prepared to comply with the whole organic process.

Download the [actual list of control bodies and authorities](#) to see which certifiers are active in your region.

## Fairtrade

Fairtrade is not top of mind for Dutch importers. Most fruit and vegetables importers do not see much added value in a fairtrade label. This does not mean that your product should not comply with social standards. Standards such as SMETA are becoming a common requirement.

For a few specialised companies and for specific fruit, fairtrade labels are more common. [Fairtrade](#) is a significant label for bananas and importers such as Dole, Fyffes and AgroFair. The Dutch supermarket [PLUS](#) has committed to 100% Fairtrade bananas since 2010.

### Tips:

Implement a fairtrade scheme if you see a particular interest from your buyers or when you export bananas.

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

## 2. Through what channels can you get fresh fruit and vegetables on the Dutch market?

The diversity of Dutch buyers of fresh fruit and vegetables is large. Working with the right company can provide you with access to both the Netherlands and other European markets. In the Dutch market supermarkets are

the most dominant segment.

## How is the end market segmented?

The market shares of the fresh produce retail trade are not systematically recorded. Supermarkets are without doubt the most dominant channel for fresh fruit and vegetables in the Netherlands. The number of specialised fruit and vegetable shops and ambulant merchants have been decreasing over the past years. But both the sales in supermarkets and in specialised stores increased during the COVID-19 lockdowns.

Table 2: Total number of businesses per segment

	Q4 2018	Q4 2021	growth
Supermarkets	3,045	3,170	+4%
Wholesalers in fruit and vegetables*	1,285	1,425	+11%
Specialised fruit and vegetable stores	915	860	-6%
Street market merchants	895	850	-5%
Processors of fruit and vegetables	180	235	+31%

Source: Statistics Netherlands ([CBS](#)) \*wholesalers are not an end market

## Supermarkets

Fresh fruit and vegetables are the most important category for supermarkets. Their sales make up about [9.5% of the total turnover of a supermarket](#). According to [Retail Insiders](#), supermarkets had a market share of 78% in the sales of fresh fruit and vegetables. Competition among supermarkets is high, and as a supplier you must deal with strict retailer standards.

Albert Heijn is the largest supermarket chain with a 35% market share in their segment, followed by the fast-growing Jumbo supermarket. Discount formulas such as Lidl and Aldi have also increased their market share over the past years. The rest of the market is covered by Superunie, a cooperative that supplies a number of supermarket formulas, such as PLUS, Dirk van den Broek, COOP and Hoogvliet. Within this group, PLUS supermarket is the largest with a market share of 6.7%.

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. The COVID-19 pandemic has given online sales a boost.

## Specialised stores and street markets

Independent shops face the challenge of differentiating from supermarkets, for example in assortment, quality or in price. The estimated market share for shops and street market merchants specialised in fruit and vegetables is around 7% for vegetables and 16% for fruit. A relatively dominant customer group for this segment are pensioners and ethnic buyers.



In the past years, the specialised businesses have gradually lost market shares. But during the COVID-19 pandemic, they were able to increase their sales due to the closure of restaurants. Fruit and vegetable shop keepers were able to offer the consumer a good alternative with ready-made soups, salads and meals.

Another type of specialisation is organic. The Netherlands counted 313 organic specialty shops and grocery stores in 2020. The most relevant ones for organic fresh fruit and vegetables are the 120 outlets that are part of the formulas of [Ekoplaza](#), [Odin](#) and [Marqt](#). The [Bionext trend report](#) shows that their sales of fresh fruit and vegetables increased 14.5% during the pandemic year of 2020, to a total value of €59.3 million. In 2019, the sales of organic produce in this specialised segment increased only by 2.6%.

## Foodservice segment

The Dutch Horeca (hotels, restaurants and caterers) is normally a large user of fresh products. 2020 and 2021 have been dramatic years for the foodservice industry. According to the [FoodService Institute news update in AGF.nl](#) the foodservice sector saw its market share drop from 33% (2019) to 24.6% (2021) as a result of the COVID-19 measures. But the pandemic also gave a boost to the development of take away and home delivery services. The food service segment is expected to recover over the next year(s).

You can expect a greater focus on local fruit and vegetables with restaurants offering food according to the seasons. At the same time, the gastronomic segment remains an important market for exotic and unique fruits and vegetables. Suppliers in the gastronomic segment can be wholesalers that are specialised in fresh fruit and vegetables, but also cash and carry that offer a complete professional assortment.

### Tips:

Maintain high standards and offer reliable volumes to make your offer suitable for the supermarket segment. If you cannot comply with supermarket standards, differentiate with a unique product to target more specialised market segments.

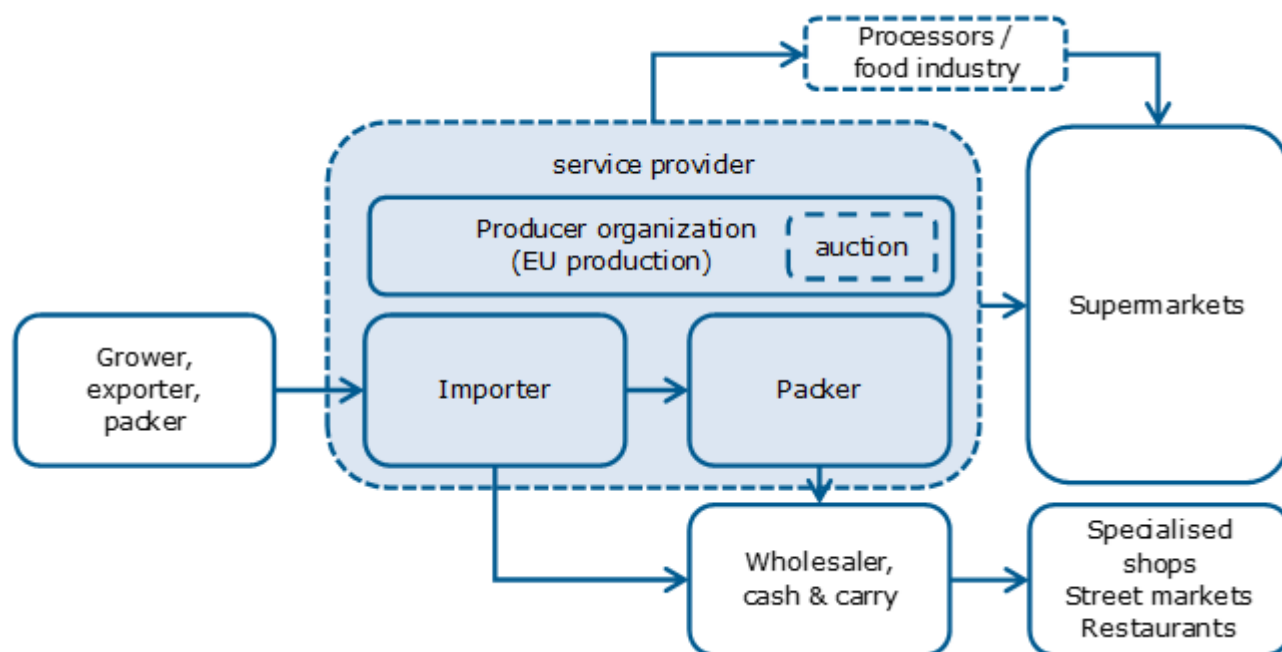
Read about the Dutch market potential for fresh fruit and vegetables to understand the trends that drive the development of certain segments.

Use the translation function of your web browser to read website links in this study in your own language.

## Through what channels does a product end up on the end market?

Typical channels that supply fresh fruit and vegetables on the Dutch market include grower cooperatives, international traders, service providers, wholesalers and processors such as cutters. Import, re-export, wholesale activities and added services often overlap.

Figure 4: The Dutch market channels for fresh fruit and vegetables



## Producer cooperatives

Producer cooperatives have an important role in the supply of fresh fruit and vegetables. These cooperatives are well organised and throughout the season they leave little room for foreign suppliers. Dutch growers are very capable of producing a range of fruit and vegetables, including peppers, tomatoes, eggplants, cucumbers, onions, potatoes, apples, pears, strawberries and other soft fruit. Greenhouses can extend the production into colder months.

Among the grower cooperatives are [the Greenery](#) (Coforta), [Growers United](#), [Harvest House](#), [OXIN Growers](#), [ZON Fruit and Vegetables](#), and [FruitMasters](#). These cooperatives may be your competitor during the local season, but their commercial extensions will also purchase off-season to fulfil the need of retailers.

## Importers and traders

Importers and traders in the Netherlands are specialised in organising the supply chain of fresh produce, not only for the Dutch market, but also for the distribution to other European countries. They manage the sourcing, perform quality checks and match the supply with the demand. They do this not only for the Dutch market, but usually also work internationally.

You can find a wide range of different types of traders and importers. The Netherlands is home to several large import companies, such as [Hagé International](#) (part of the Greenery), [Bakker Barendrecht](#) (supplier to Albert Heijn), [Nature's Pride](#) (market leader in avocados and mangoes), [Levarht](#) and [Roveg](#).

International companies also have a strong presence in the Netherlands, such as [Greenyard](#), [TotalProduce](#) (now part of Dole) with several sub-branches such as [Haluco](#) and [Frankort & Koning](#).

Importers can have different specialisations. For example, the company [Van Oers United](#) is mainly focused on the import of vegetables, [Olympic Fruit](#) specialises in grapes and citrus fruit and Chiquita is a leading importer of bananas. In the specialised channel there are also importers of exotic fruit and vegetables such as [BUD Holland](#), ethnic produce such as [Belimpex](#), and organic products, for example [Eosta](#) or [OTC Organic](#).

## Service providers

A number of fresh produce importers have expanded to become service providers to large retail chains. Several

of the companies mentioned earlier, such as Bakker Barendrecht (Albert Heijn) and Nature's Pride (Superunie), have direct relations with major supermarkets and retail purchase organisations. These companies offer (re-)packing, ripening and distribution services and become preferred suppliers to retailers.

Supermarkets usually work with supply programmes and want to buy as close to the source as possible. This gives them control and transparency in their supply chain. They usually have several fixed contracts with service suppliers, which can change per season. But they also buy additional products from other suppliers when it is convenient. You can become part of this supply chain if you are able to offer the quality and logistics that a service provider requires.

## Wholesalers

The wholesale channel in the Netherlands is characterised by spot sales and a large number of companies with different business activities.

Wholesalers are responsible for fruit and vegetables ending up in the food service or gastronomic segment, small retailers and processors. But the wholesale channel is far from being a black and white channel. The level of integration and added services is high.

The wholesaler [Van Gelder](#) sells fresh fruit and vegetables to business clients such as restaurants and cash & carry (Bidfood), and in addition created a separate web shop for consumers. The company [Smeding](#) has specialised in the wholesale of fruit and vegetables and found a close cooperation with cash and carry wholesaler Sligro. [Kraaijeveld](#) and [De Groot International](#) combine wholesale services with their own import channels, offering a full assortment to gastronomic wholesale clients, processing industries and retail. You can find a large concentration of traditional and smaller wholesalers at (former) [wholesale markets](#).

## Processors

The turnover in the processing segment has increased significantly over the past years. The net turnover in 2019 was €5.9 billion, almost one billion euros more than in 2015. In particular the processors that offer freshly cut vegetables and meal kits have gained terrain in the developing demand for convenience products. Companies that lead the growth are [Hessing](#), [Heemskerk](#) and [Plukon Convenience](#).

### Tip:

Use the major market channels of service providers when you are targeting Dutch supermarkets. Their retail programmes and supply contracts may provide some stability, but remember that supermarkets maintain strict rules and do not allow you or your buyer to change supply conditions.

## What is the most interesting channel for you?

Importers and traders manage the supply chain. They will be your most likely channel to enter the Dutch and the European market. Which importer is most suitable for your company depends on your product and ambition.

As a foreign supplier, you should check how a business partner operates and with which payment terms. Importers that offer fixed prices offer more security than the ones with a minimum price guarantee (mpg). But you could also opt for a business relation that is good at representing your company on commission basis.

Finding potential buyers in the Netherlands is not difficult. Most are easy to find on the internet and very accessible, but finding the right one can be more challenging. Many buyers have well-established relations, mostly with medium and large suppliers that are directly involved with agricultural production. Do not expect

every buyer to have a concrete interest in new suppliers.

Take your time to build relationships. To supply large buyers and service suppliers to retailers you must have a uniform and reliable quality, complying with strict requirements in certification and residue limits. For exotic and niche fruit and vegetables, you can best approach specialised importers.

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.

### Tips:

Get familiar with Dutch buyers by visiting the most relevant trade fairs in Europe: [Fruit Logistica](#) in Berlin and [Fruit Attraction](#) in Madrid.

Avoid doing business with partners with similar end clients. Despite 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.

Find an overview of Dutch buyers of fruit and vegetables on the [Fruit Logistica exhibitor list](#) or in the [member list of the Fresh Produce Centre](#).

Read the [CBI tips for finding buyers on the European fresh fruit and vegetables market](#) for more tips.

## 3. What competition do you face on the Dutch fresh produce market?

Many large growers export to the Netherlands from counter-seasonal producing countries, such as Peru and South Africa. Competition is fierce, but there are always opportunities for professional suppliers that have an interesting and compliant product. For a steady presence on the market, expect to work closely together with importers or integrate your supply chain.

### Which countries are you competing with?

Dominant suppliers to the Netherlands include Peru and South Africa with a wide offer of fresh fruits, followed by Chile and Brazil, and the banana-exporting countries Costa Rica and Panama. Significant growth is also seen in Colombia (avocado), Ecuador (banana), Dominican Republic (banana and avocado) and Tunisia (tomatoes and dates). Spain is the largest supplier, but as a European country is not included in the analysis.

Table 3: The main non-European origin countries of fruit and vegetables with the highest import value in 2020, in € million

Avocados	Bananas	Table grapes	Oranges	Mangoes (incl. mangosteen and guava)	Blueberries & other berries of the Vaccinium genus

Peru (277)	Panama (203)	South Africa (297)	South Africa (176)	Peru (140)	Peru (201)
Colombia (124)	Costa Rica (191)	Peru (141)	Egypt (79)	Brazil (129)	Chile (107)
Chile (115)	Ecuador (102)	India (107)	Morocco (14)	Ivory Coast (13)	South Africa (30)
South Africa (78)	Guatemala (28)	Egypt (45)	Zimbabwe (9)	USA (11)	Argentina (11)
Mexico (58)	Dominican Republic (28)	Brazil (39)	Uruguay (7)	Dominican Republic (10)	Serbia (8)
Kenya (49)	Peru (15)	Namibia (34)	Peru (4)	Senegal (7)	Zimbabwe (3)

Source: [ITC Trade Map](#)

## Peru

Peru is the leading supplier to the Netherlands with a total value of €822 million in 2020. It is the largest supplier of avocado, mango and blueberry.

The growth of Peruvian fresh export has been incredible. The agricultural area has been extended with major irrigation projects, such as near the villages of Majes and Olmos. This has made it possible for companies to increase the production volume of several different fruits. The strong supply from Peru regularly results in lower prices in Europe. This makes it difficult for other countries to compete in the same season.

Peru has proven their capacity to produce large volumes and generally good quality for the European market. But with the current volumes it will be difficult to keep up the same growth rate.

## South Africa

South Africa has an opposite production season from Europe. It is an excellent place for European importers to source counter-seasonal products. Therefore, Europe is an important export destination for South African fruit and vegetable exporters.

Europe imported nearly €2.5 billion of fresh fruit and vegetables from South Africa. The Netherlands was responsible for a third of that value. South Africa is the Netherlands' main supplier of table grapes and citrus fruit.

Oranges are by far South Africa's biggest citrus type, accounting for roughly 60% of the citrus exports. The most exported variety is the Valencia orange, followed by the Navel variety. For most fruits the cultivation area is

more or less stable. The area for blueberries, Valencia oranges, lemons and soft citrus has increased over the past few years, while avocados, table grapes and Navel oranges stayed nearly the same.

Dutch imports from South Africa continue to increase, in particular for lemons, mandarin hybrids, table grapes, blueberries, and avocados.

The growing exports can be partly attributed to higher yields. South African growers have many years of experience and are [at the forefront of implementing new technology](#). Precision farming with drones and artificial intelligence helps farmers to produce more with less water and less land. This is an advantage that will secure South Africa's position in fresh exports.

### Tip:

See the [2020 Key Fruit Statistics](#) of Fruit South Africa to see in which products South Africa excels.

## Chile

Chile has been a steady supplier of fresh products to the Netherlands for many years. In 2020 the Chilean product with the highest import value in the Netherlands was avocado (€115 million), followed by blueberries (approximately €114 million), table grapes (€66 million) and apples (€32 million).

The Netherlands is the largest importer of avocados from Chile. But for table grapes, the USA and China are much more important destinations than the Netherlands.

Growers in Chile are advanced in terms of knowledge and technology, but in terms of production volume they seem to be reaching their maximum capacity. Logistically they are also further away from the Netherlands than Peru and South Africa, which makes it harder to compete.

In the next years, export markets such as China will increase in importance. However, the potential of Chile's fruit and the long-term relationships in the Netherlands must not be underestimated.

### Tip:

Check when Chilean fruits are available on [Fruits from Chile](#) to avoid competition with exporters from Chile.

## Costa Rica

Costa Rica is specialised in a few types of fruit and vegetables for export, which are mainly bananas and pineapples, but also melons and cassava. Most of these products from Costa Rica enter Europe through the Netherlands.

In pineapples and fresh cassava, Costa Rica almost has a monopoly in the supply to the Netherlands. The export-focused production of these products will compete with growers around the world.

But according to the trade promotion agency [Procomer](#), there are a number of products with greater export potential that Costa Rica could explore. Among these products are physalis, pitaya, rambutan, mangosteen, passion fruit, soursop, papaya and mango.

## Brazil

Brazil is one of the larger exporters of fresh fruit to the Netherlands. This mainly involves mangoes (€100 million), melons (€74 million), limes (€68 million) and table grapes (€27 million).

The country size and climate zones are favourable for Brazilian farms. However, they do not depend as much on export as, for example, Peru or South Africa. With over 200 million inhabitants, Brazil has a large domestic market.

On the other hand, Brazilian companies have no problem in adapting to export markets in Europe such as the Netherlands. For example, Tommy Atkins mangoes are increasingly making place for fibreless varieties such as Palmer or Kent mangoes, and new tasty grape varieties have been introduced to address the European and international preferences.

## Panama

Panama is the sixth-largest exporter of fresh produce to the Netherlands, but the trade value consists of bananas for 95%. Chiquita Panama is one of the main exporters of bananas. The rest of the value was mostly covered by watermelons and pineapples.

Panama will not likely become a strong competitor in many other products, nor is there a significant growth in export value to the Netherlands.

However, Panama has a crucial role in the fresh logistics from South American countries such as Peru, Chile and Ecuador. Hiccups in the Panama channel will directly affect imports from these countries.

### Tips:

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

Use [ITC Trade Map](#) or the [statistics function of Access2Markets](#) to see which are the main suppliers to Europe.

## Which companies are you competing with?

Dutch importers as well as retailers look for suppliers that can guarantee a reliable supply with a great quality-price ratio. Foreign companies take interest in the Netherlands due to its logistical and commercial strengths and invest in partnerships or a physical presence. As a supplier, you are in the best position to compete when you have the means to invest in quality production.

### Camposol - Peru

Large companies in producing countries take an interest in the Netherlands because of its logistical position in the fresh trade. [Camposol](#), one of the largest producers in Peru, decided to invest in a commercial office in the

Netherlands to strengthen its presence in Europe. It also makes them less dependent on the traditional import channels.

For most export companies such investment is out of reach. For them it will be difficult to compete with these integrated supply chains. On the other hand, foreign sales offices also need to ensure a year-round supply. So they often start buying from other origins when the mother company is unable to supply.

As an exporter you will see an increasing number of integrated companies in the future. The best way to deal with this is by looking for strong partnerships and joint ventures yourself.

## **SRCC - South Africa**

Size and capital are incredibly important in setting up a successful export business. Sundays River Citrus Company ([SRCC](#)) is specialised in the cultivation of citrus fruit with nurseries and packing lines, and have a capacity of 9 million cartons per season. The company claims to have grown into the largest grower, packer and exporter of South African citrus. The integration of nurseries, production, packing and export has given the company a strong position to negotiate with supermarkets in the Netherlands.

SRCC established a long-term relationship with Dutch retailer Albert Heijn. The cooperation also led to receiving an investment of the [Albert Heijn Foundation](#) in training facilities for farmers and employees. For Albert Heijn SRCC can deliver large volumes with the right balance of quality and price.

### **Tips:**

Look for partnerships in your country to increase your production and negotiation power if you have difficulties to compete as a small supplier.

Make sure to have access to excellent packing and logistical services. You cannot allow for weak links in your supply chain. Contract an experienced third party if you do not have your own facilities.

Define your strengths as a company and your competitive advantage well before entering the Dutch market. You can differentiate on different levels, for example with services, varieties, quality or your distance to the market, but you need to have a focus.

## **Which products are you competing with?**

Domestic and European products may compete with imports from developing countries. All over Europe there is a growing preference for more sustainable and locally produced fruit and vegetables. In the Netherlands this will be most notable with Dutch products that are in season. An extensive greenhouse production can extend the domestic season.

Domestic products are fresher, but also prices are usually lower during the local season. Local produce sometimes also has a connotation of quality. For instance, in-season strawberries are often sold as 'Dutch strawberries' to differentiate in quality. When Dutch strawberries are in season, the demand for imported soft fruit decreases.

Local products that may compete with imports from developing countries include apples, pears, strawberries and other soft fruit, but most competition will come from greenhouse vegetables such as tomatoes, sweet peppers, aubergines, among many others. Exotic vegetables such as sugar snaps, snow peas, and tropical fruit such as mangoes, bananas and avocados will experience less direct competition.



Your competition from local products will be the least during the Dutch winter period. This is the period when the consumption of imported fruit and vegetables is highest.

**Tip:**

Find opportunities for products with limited production in the Netherlands or in European countries. When you want to supply products that are common in local production, make sure you can produce outside the local season and preferably close to the European markets.

## 4. What are the prices for fresh fruit and vegetables?

Any Dutch trader will tell you that the market determines the price of the product. In the case of the Netherlands, the price is not only determined by the Dutch market, but also by the demand in other European markets.

In the case of very exotic and niche products, the import is small and mostly demand-driven. For other fruit and vegetables, availability is one of the most important influences for prices. Fruit and vegetables that are among the main consumed products, such as avocado, grapes and oranges, usually have a programmed supply. This sometimes gives a better price stability. When there is an oversupply, large retail chains can plan additional promotions to push more into the market. These promotions, such as '2 for the price of 1', are very common in the Netherlands.

Importers in the Netherlands generally say they work with a profit margin on the sales price of at least 8%, excluding import and handling costs. In practice this can be higher.

According to retail specialists, the gross margin on fresh fruit and vegetables of supermarkets is 35% on average. The margin for specific fresh products depends on the rotation and shelf life. For more perishable and slower-selling fruit the retail margin will be highest. As an exporter, you have to be aware that there is not always a direct relation between trade prices and consumer prices.

The consumer prices have increased over the past 5 years, in particular for fresh fruit. In 2020, the prices for vegetables were 6.5% higher than in 2015, and almost 15% higher for fresh fruit. Prices will continue to fluctuate according to the available supplies. In the long term prices will continue to rise mainly due to climate change, increasing production costs and stricter sustainability requirements of buyers in Europe. According to [Eurostat](#), the Dutch prices for fruit and vegetables were slightly above the average in the European Union in 2020. In most north-western European countries the prices are significantly higher.

**Tip:**

For accurate prices, contact your (potential) buyer or trade contacts in the Netherlands. Consumer prices can be easily found on the websites of different supermarkets, such as [Albert Heijn](#), [Jumbo](#), [PLUS](#) and [Ekoplaza](#) (for organic produce).

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