



Health and Wellness in the Netherlands

July 2024

Table of Contents

EXECUTIVE SUMMARY

- Health and wellness in focus
- Consumer weight trends
- Consumer diet trends
- Health-related deaths
- Blood pressure and cholesterol levels
- Diabetes prevalence

DISCLAIMER

HW Hot Drinks in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

- No caffeine coffee drives the strongest growth as consumers seek convenient ways to improve health
- Low fat hot drinks gain ground as concerns surrounding obesity and diabetes rise
- A good source of minerals coffee records a strong performance as consumers appreciate fortified goods

PROSPECTS AND OPPORTUNITIES

- Vegan hot drinks drive growth as diets that avoid animal products rise
- Organic hot drinks benefit from improved disposable incomes across the forecast period
- Natural options gain ground, driven by negative discussions around ultra-processed food

CATEGORY DATA

- Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2019-2023
- Table 2 - Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2023
- Table 3 - Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 4 - Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 5 - Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 6 - Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 7 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2023
- Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2023-2028
- Table 9 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2023-2028

HW Soft Drinks in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

- No sugar is the leading claim as consumers migrate away from sugar-filled beverages
- Rising health awareness drives growth for a good source of vitamins in juice
- Weight management registers positive growth following obesity concerns

PROSPECTS AND OPPORTUNITIES

- Soft drinks players offer low and no sugar innovations to drive growth
- The natural claim drives sales as the focus on ultra-process food and drinks intensifies
- High fibre claims are a strong source of growth for soft drinks in the Netherlands

CATEGORY DATA

- Table 10 - Sales of Soft Drinks by Health and Wellness Type: Value 2019-2023
- Table 11 - Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2023
- Table 12 - Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 13 - Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 14 - Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 15 - Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 16 - Company Shares of Gluten Free Soft Drinks (5th Biggest HW Type in Global Soft Drinks): % Value 2019-2023

Table 17 - Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2023-2028

Table 18 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2023-2028

HW Snacks in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Vegan snacks register the strongest sales as high-quality vegan ice cream gains ground
Gluten free is a leading claim as those without allergies seek health benefits of gluten free goods
Low fat gains ground with double-digit retail value growth as obesity concerns rise

PROSPECTS AND OPPORTUNITIES

The implementation of the Nutri-Score label impacts innovations and purchasing habits
The keto claim gains ground as obesity continues to rise in the Netherlands
The no added sugar claim drives sales as consumers look for natural goods

CATEGORY DATA

Table 19 - Sales of Snacks by Health and Wellness Type: Value 2019-2023

Table 20 - Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2023

Table 21 - Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2023

Table 22 - Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2019-2023

Table 23 - Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2023

Table 24 - Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2023

Table 25 - Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2023

Table 26 - Forecast Sales of Snacks by Health and Wellness Type: Value 2023-2028

Table 27 - Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2023-2028

HW Dairy Products and Alternatives in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Low fat is the leading claim as obesity concerns and EU legislation drives sales
High protein dairy products are appreciated for supporting fitness and health goals
Plant-based options rise as health and ethical consumers influence dietary behaviours

PROSPECTS AND OPPORTUNITIES

Weight management grows in health and wellness dairy products and alternatives
High protein drives sales as fitness regimes shape consumer dietary habits
The low salt claim will see escalating demand as health concerns rise

CATEGORY DATA

Table 28 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2023

Table 29 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2023

Table 30 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2023

Table 31 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V

Table 32 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value

2019-20

Table 33 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2

Table 34 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2023

Table 35 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2023-2028

Table 36 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2023-2028

HW Cooking Ingredients and Meals in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Meat-free diets rises across the Netherlands, driving growth in the vegetarian claim
The natural claim registers double-digit growth as consumers avoid artificial ingredients
Low fat meals record double-digit growth as concerns surrounding obesity increase

PROSPECTS AND OPPORTUNITIES

The vegan claim drives growth as plant-based diets continue to rise
The immune support claim is set to recover, driving growth over the forecast period
Higher price points challenge sales of organic cooking ingredients and meals

CATEGORY DATA

Table 37 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2023

Table 38 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2023

Table 39 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 40 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 41 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 42 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 43 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2023

Table 44 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2023-2028

Table 45 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2023-2028

HW Staple Foods in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

The high fibre claim records the strongest sales in health and wellness staple foods
Vegan options struggle during rising prices, however, retailers invest in the claims potential
Significant growth in no fat staple foods supported by EU legislation

PROSPECTS AND OPPORTUNITIES

Fortified options and no allergen claims have strong growth potential in the Netherlands
Distribution of gluten free staple foods rises, improving sales across the forecast period
Sales of vegan staple foods recover, supported by ongoing dietary changes

CATEGORY DATA

Table 46 - Sales of Staple Foods by Health and Wellness Type: Value 2019-2023

Table 47 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2023

Table 48 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 49 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 50 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 51 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 52 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2019-2023

Table 53 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2023-2028

Table 54 - Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/health-and-wellness-in-the-netherlands/report.