

Snacks in the Netherlands

June 2024

Table of Contents

Snacks in the Netherlands

EXECUTIVE SUMMARY

Snacks in 2024: The big picture

Key trends in 2024

Competitive Landscape

Channel developments

What next for snacks?

MARKET DATA

- Table 1 Sales of Snacks by Category: Volume 2019-2024
- Table 2 Sales of Snacks by Category: Value 2019-2024
- Table 3 Sales of Snacks by Category: % Volume Growth 2019-2024
- Table 4 Sales of Snacks by Category: % Value Growth 2019-2024
- Table 5 NBO Company Shares of Snacks: % Value 2020-2024
- Table 6 LBN Brand Shares of Snacks: % Value 2021-2024
- Table 7 Penetration of Private Label by Category: % Value 2019-2024
- Table 8 Distribution of Snacks by Format: % Value 2019-2024
- Table 9 Forecast Sales of Snacks by Category: Volume 2024-2029
- Table 10 Forecast Sales of Snacks by Category: Value 2024-2029
- Table 11 Forecast Sales of Snacks by Category: % Volume Growth 2024-2029
- Table 12 Forecast Sales of Snacks by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume sales struggle as value sales rise

Tablets bucks the trend and sees volume sales growth in 2024

Countlines sees cross-category collaborations

PROSPECTS AND OPPORTUNITIES

Prices set to keep on rising

Growth potential in snacking-while-streaming trend

Competitive threats to intensify, with opportunity in plant-based options

Summary 2 - Other Chocolate Confectionery by Product Type: 2024

CATEGORY DATA

- Table 13 Sales of Chocolate Confectionery by Category: Volume 2019-2024
- Table 14 Sales of Chocolate Confectionery by Category: Value 2019-2024
- Table 15 Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024
- Table 16 Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024
- Table 17 Sales of Chocolate Tablets by Type: % Value 2019-2024
- Table 18 NBO Company Shares of Chocolate Confectionery: % Value 2020-2024
- Table 19 LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024
- Table 20 Distribution of Chocolate Confectionery by Format: % Value 2019-2024
- Table 21 Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029
- Table 22 Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029
- Table 23 Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Gum in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Gum sees volume sales decline in 2024

Gum's struggles persist

Perfetti acquires several brands, while Cloetta launches sugar-free 'big gums'

PROSPECTS AND OPPORTUNITIES

Volume sales will fall further

Development depends on Perfetti van Melle while sustainability concerns intensify

A shift away from mint and a decline in impulse purchases

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024

Table 26 - Sales of Gum by Category: Value 2019-2024

Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024

Table 28 - Sales of Gum by Category: % Value Growth 2019-2024

Table 29 - Sales of Gum by Flavour: Rankings 2019-2024

Table 30 - NBO Company Shares of Gum: % Value 2020-2024

Table 31 - LBN Brand Shares of Gum: % Value 2021-2024

Table 32 - Distribution of Gum by Format: % Value 2019-2024

Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029

Table 34 - Forecast Sales of Gum by Category: Value 2024-2029

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

Sugar Confectionery in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sugar confectionery sees category-wide declines in 2024

Players remain invested in value-added features

Perfetti leads power mints while self-scanning checkouts subvert impulse buys

PROSPECTS AND OPPORTUNITIES

Rising unit prices and health concerns to hamper progress for sugar confectionery

Development depends on players' continued commitment

Liquorice to suffer despite local popularity

Summary 3 - Other Sugar Confectionery by Product Type: 2024

CATEGORY DATA

Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024

Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024

Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024

Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024

- Table 45 Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029
- Table 46 Forecast Sales of Sugar Confectionery by Category: Value 2024-2029
- Table 47 Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029
- Table 48 Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ice cream sees falling volume sales in 2024

Seasonality impact wanes

Water ice cream falls faster than dairy ice cream, while collaboration leads to socially responsible product launch

PROSPECTS AND OPPORTUNITIES

Positive growth anticipated for ice cream

Dairy ice cream to continue to benefit from year-round consumption habits

Health and sustainability trends will drive development in ice cream

CATEGORY DATA

- Table 49 Sales of Ice Cream by Category: Volume 2019-2024
- Table 50 Sales of Ice Cream by Category: Value 2019-2024
- Table 51 Sales of Ice Cream by Category: % Volume Growth 2019-2024
- Table 52 Sales of Ice Cream by Category: % Value Growth 2019-2024
- Table 53 Sales of Ice Cream by Leading Flavours: Rankings 2019-2024
- Table 54 Sales of Impulse Ice Cream by Format: % Value 2019-2024
- Table 55 NBO Company Shares of Ice Cream: % Value 2020-2024
- Table 56 LBN Brand Shares of Ice Cream: % Value 2021-2024
- Table 57 NBO Company Shares of Impulse Ice Cream: % Value 2020-2024
- Table 58 LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024
- Table 59 NBO Company Shares of Take-home Ice Cream: % Value 2020-2024
- Table 60 LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024
- Table 61 Distribution of Ice Cream by Format: % Value 2019-2024
- Table 62 Forecast Sales of Ice Cream by Category: Volume 2024-2029
- Table 63 Forecast Sales of Ice Cream by Category: Value 2024-2029
- Table 64 Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029
- Table 65 Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

Savoury Snacks in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume and value sales rise in 2024

Potato chips turns in positive performance

PepsiCo reformulates with health in mind and increases support to Duyvis

PROSPECTS AND OPPORTUNITIES

Volume growth to continue throughout forecast period

Tortilla chips faces positive outlook while overall category will lack innovation

Vegetable, pulse and bread chips to rise fastest, with progress in store of nuts, seeds and trail mixes

Summary 4 - Other Savoury Snacks by Product Type: 2024

CATEGORY DATA

- Table 66 Sales of Savoury Snacks by Category: Volume 2019-2024
- Table 67 Sales of Savoury Snacks by Category: Value 2019-2024
- Table 68 Sales of Savoury Snacks by Category: % Volume Growth 2019-2024
- Table 69 Sales of Savoury Snacks by Category: % Value Growth 2019-2024
- Table 70 NBO Company Shares of Savoury Snacks: % Value 2020-2024
- Table 71 LBN Brand Shares of Savoury Snacks: % Value 2021-2024
- Table 72 Distribution of Savoury Snacks by Format: % Value 2019-2024
- Table 73 Forecast Sales of Savoury Snacks by Category: Volume 2024-2029
- Table 74 Forecast Sales of Savoury Snacks by Category: Value 2024-2029
- Table 75 Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029
- Table 76 Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

Sweet Biscuits, Snack Bars and Fruit Snacks in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sweet biscuits drives overall decline in 2024

Protein/energy bars leads category growth

Snack bars suffers from positioning problems, and United Biscuits launches new variants

PROSPECTS AND OPPORTUNITIES

Decline forecast for overall category

Snack bars to see continued expansion

Clarity over snack bar positioning

CATEGORY DATA

- Table 77 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024
- Table 78 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024
- Table 79 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024
- Table 80 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024
- Table 81 NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024
- Table 82 LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024
- Table 83 NBO Company Shares of Sweet Biscuits: % Value 2020-2024
- Table 84 LBN Brand Shares of Sweet Biscuits: % Value 2021-2024
- Table 85 NBO Company Shares of Snack Bars: % Value 2020-2024
- Table 86 LBN Brand Shares of Snack Bars: % Value 2021-2024
- Table 87 NBO Company Shares of Fruit Snacks: % Value 2020-2024
- Table 88 LBN Brand Shares of Fruit Snacks: % Value 2021-2024
- Table 89 Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024
- Table 90 Distribution of Sweet Biscuits by Format: % Value 2019-2024
- Table 91 Distribution of Snack Bars by Format: % Value 2019-2024
- Table 92 Distribution of Fruit Snacks by Format: % Value 2019-2024
- Table 93 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029
- Table 94 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029
- Table 95 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029
- Table 96 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2024-2029

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/snacks-in-the-netherlands/report.