



**Euromonitor
International**

Dairy Products and Alternatives in the Netherlands

August 2024

Table of Contents

EXECUTIVE SUMMARY

Dairy products and alternatives in 2024: The big picture
Key trends in 2024
Competitive landscape
Channel developments
What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2019-2024
Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2019-2024
Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2020-2024
Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2021-2024
Table 5 - Penetration of Private Label by Category: % Value 2019-2024
Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2019-2024
Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2024-2029
Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Unit price increases drive retail value growth as retail volume sales dip
New pack sizes to cater to consumers' budget needs
Truly Foods offers new organic snack

PROSPECTS AND OPPORTUNITIES

Rising birth rate to positively impact the demand for baby food
Development opportunities for "other" baby food
Liquid format fits with the demand for convenience

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2019-2024
Table 10 - Sales of Baby Food by Category: Value 2019-2024
Table 11 - Sales of Baby Food by Category: % Volume Growth 2019-2024
Table 12 - Sales of Baby Food by Category: % Value Growth 2019-2024
Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2019-2024
Table 14 - NBO Company Shares of Baby Food: % Value 2020-2024
Table 15 - LBN Brand Shares of Baby Food: % Value 2021-2024
Table 16 - Distribution of Baby Food by Format: % Value 2019-2024
Table 17 - Forecast Sales of Baby Food by Category: Volume 2024-2029
Table 18 - Forecast Sales of Baby Food by Category: Value 2024-2029
Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2024-2029
Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2024-2029

Butter and Spreads in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Changes in diet limit the use of butter and spreads
Butter returns to retail volume growth as prices see a level of stabilisation
New packaging for Blue Band is the key new release

PROSPECTS AND OPPORTUNITIES

Opportunities for butter amid move away from bread consumption at breakfast
Producers retain some competitive advantages despite strong competition from edible oils
Positioning is key to the prospects of margarine and spreads and cooking fats

CATEGORY DATA

- Table 21 - Sales of Butter and Spreads by Category: Volume 2019-2024
- Table 22 - Sales of Butter and Spreads by Category: Value 2019-2024
- Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2019-2024
- Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2019-2024
- Table 25 - NBO Company Shares of Butter and Spreads: % Value 2020-2024
- Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2021-2024
- Table 27 - Distribution of Butter and Spreads by Format: % Value 2019-2024
- Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2024-2029
- Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2024-2029
- Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2024-2029
- Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2024-2029

Cheese in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Changing breakfast and lunch habits hit cheese consumption
Burrata enjoys fast-rising popularity
Players use new packaging to add dynamism to brands

PROSPECTS AND OPPORTUNITIES

Versatility to boost soft cheese consumption
Bright spots remain for cheese
Players to adapt to new consumption occasions

CATEGORY DATA

- Table 32 - Sales of Cheese by Category: Volume 2019-2024
- Table 33 - Sales of Cheese by Category: Value 2019-2024
- Table 34 - Sales of Cheese by Category: % Volume Growth 2019-2024
- Table 35 - Sales of Cheese by Category: % Value Growth 2019-2024
- Table 36 - Sales of Spreadable Cheese by Type: % Value 2019-2024
- Table 37 - Sales of Soft Cheese by Type: % Value 2019-2024
- Table 38 - Sales of Hard Cheese by Type: % Value 2019-2024
- Table 39 - NBO Company Shares of Cheese: % Value 2020-2024
- Table 40 - LBN Brand Shares of Cheese: % Value 2021-2024
- Table 41 - Distribution of Cheese by Format: % Value 2019-2024
- Table 42 - Forecast Sales of Cheese by Category: Volume 2024-2029
- Table 43 - Forecast Sales of Cheese by Category: Value 2024-2029
- Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2024-2029
- Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2024-2029

Drinking Milk Products in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Price stabilisation and changing eating habits offer benefits for drinking milk products
Plant-based milk undermines goat milk
Animal welfare and environmental certifications influence retailer and consumer choices

PROSPECTS AND OPPORTUNITIES

Price stability, population growth and natural health and wellbeing content offer growth opportunities
Shelf stable milk use in drinks to push consumption while changing eating habits hit fresh milk
Expanded ranges and new concepts to add dynamism to dairy only flavoured milk drinks

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2019-2024
Table 47 - Sales of Drinking Milk Products by Category: Value 2019-2024
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2019-2024
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2019-2024
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2020-2024
Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2021-2024
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2019-2024
Table 53 - Forecast Sales of Drinking Milk Products by Category: Volume 2024-2029
Table 54 - Forecast Sales of Drinking Milk Products by Category: Value 2024-2029
Table 55 - Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2024-2029
Table 56 - Forecast Sales of Drinking Milk Products by Category: % Value Growth 2024-2029

Yoghurt and Sour Milk Products in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Yoghurt and sour milk products benefit from changing breakfast habits
Stabilisation of prices supports retail volume sales rebound
Optimel Protein to pique the interest of health-conscious consumers

PROSPECTS AND OPPORTUNITIES

Positive outlook for yoghurt and sour milk products
High-protein offerings to push growth trajectories
Convenience factor and wider consumption occasions to foster sales

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2019-2024
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2019-2024
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2019-2024
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2019-2024
Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2019-2024
Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2020-2024
Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2021-2024
Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2019-2024
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2024-2029
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2024-2029
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2024-2029
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2024-2029

Other Dairy in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Evolving eating choices favour indulgence desserts over custard
Quark remains a key growth driver
Indulgence stimulates chilled dairy desserts

PROSPECTS AND OPPORTUNITIES

Plain and flavoured quarks to flourish as health-positioned options
Coffee whiteners and evaporated milk suffer from changing coffee drinking habits
Rising challenge to Royal FrieslandCampina’s leadership

CATEGORY DATA

- Table 69 - Sales of Other Dairy by Category: Volume 2019-2024
- Table 70 - Sales of Other Dairy by Category: Value 2019-2024
- Table 71 - Sales of Other Dairy by Category: % Volume Growth 2019-2024
- Table 72 - Sales of Other Dairy by Category: % Value Growth 2019-2024
- Table 73 - Sales of Cream by Type: % Value 2019-2024
- Table 74 - NBO Company Shares of Other Dairy: % Value 2020-2024
- Table 75 - LBN Brand Shares of Other Dairy: % Value 2021-2024
- Table 76 - Distribution of Other Dairy by Format: % Value 2019-2024
- Table 77 - Forecast Sales of Other Dairy by Category: Volume 2024-2029
- Table 78 - Forecast Sales of Other Dairy by Category: Value 2024-2029
- Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2024-2029
- Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2024-2029

Plant-Based Dairy in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

New players and investments add dynamism to plant-based dairy
Scramble for plant-based dairy as players look for new growth avenues
Arla Foods launches a key novelty in 2024

PROSPECTS AND OPPORTUNITIES

“Other” plant-based milk to drive growth
Producers of plant-based cheese find it hard to offer convincing alternatives
Ongoing investments to develop and grow the category

CATEGORY DATA

- Table 81 - Sales of Plant-Based Dairy by Category: Value 2019-2024
- Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2019-2024
- Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2021-2024
- Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2020-2024
- Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2021-2024
- Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2019-2024
- Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2024-2029
- Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2024-2029

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/dairy-products-and-alternatives-in-the-netherlands/report.