

Dairy Products and Alternatives in the Netherlands

September 2023

Table of Contents

[Dairy Products and Alternatives in the Netherlands](#)

EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2018-2023

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023

Table 5 - Penetration of Private Label by Category: % Value 2018-2023

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Baby Food in the Netherlands](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales remain unimpressive in 2023, while value sales rise

Nestlé Nederland's Gerber sees growth despite underwhelming reception

Drugstores show signs of recovery as e-commerce continues to expand

PROSPECTS AND OPPORTUNITIES

Demographic shifts and dynamic pricing will support volume and value growth

Key subcategories set to see strong rises

Continued shift towards value-added offerings

CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2018-2023

Table 10 - Sales of Baby Food by Category: Value 2018-2023

Table 11 - Sales of Baby Food by Category: % Volume Growth 2018-2023

Table 12 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2018-2023

Table 14 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 16 - Distribution of Baby Food by Format: % Value 2018-2023

Table 17 - Forecast Sales of Baby Food by Category: Volume 2023-2028

Table 18 - Forecast Sales of Baby Food by Category: Value 2023-2028

Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

[Butter and Spreads in the Netherlands](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rise in unit prices puts pressure on butter and spreads in 2023
Dutch dietary patterns continue to evolve
Value creation takes on prime importance in a saturated market

PROSPECTS AND OPPORTUNITIES

Changing consumption patterns will hamper sales
Butter to benefit from continued reimagining
Margarine and spreads will continue to suffer from shifting preferences

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2018-2023
Table 22 - Sales of Butter and Spreads by Category: Value 2018-2023
Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023
Table 25 - NBO Company Shares of Butter and Spreads: % Value 2019-2023
Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023
Table 27 - Distribution of Butter and Spreads by Format: % Value 2018-2023
Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028
Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Pricing pressures and plant-based pivots prolong overall decline
Changing consumption patterns further threaten growth
Private label players see continued rise in demand

PROSPECTS AND OPPORTUNITIES

Low but steady growth with warm meals set to save the day
Hard cheese to see little growth
Competitive continuity with openings for innovators

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2018-2023
Table 33 - Sales of Cheese by Category: Value 2018-2023
Table 34 - Sales of Cheese by Category: % Volume Growth 2018-2023
Table 35 - Sales of Cheese by Category: % Value Growth 2018-2023
Table 36 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
Table 37 - Sales of Soft Cheese by Type: % Value 2018-2023
Table 38 - Sales of Hard Cheese by Type: % Value 2018-2023
Table 39 - NBO Company Shares of Cheese: % Value 2019-2023
Table 40 - LBN Brand Shares of Cheese: % Value 2020-2023
Table 41 - Distribution of Cheese by Format: % Value 2018-2023
Table 42 - Forecast Sales of Cheese by Category: Volume 2023-2028
Table 43 - Forecast Sales of Cheese by Category: Value 2023-2028
Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Drinking milk products remains in decline in 2023
Goat milk falls out of favour
Müllermilk milkshake still gaining ground in 2023

PROSPECTS AND OPPORTUNITIES

Drinking milk products face varied fortunes with overall growth set to remain negative
Consumers shift from fresh to convenient
Private label products present intensifying competition

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2018-2023
Table 47 - Sales of Drinking Milk Products by Category: Value 2018-2023
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023
Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2018-2023
Table 53 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028
Table 54 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028
Table 55 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028
Table 56 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

From sweet to sour – a health-driven shift
Plain yoghurt leads growth in overall category
Current leader faces threats from all corners

PROSPECTS AND OPPORTUNITIES

Home-made trend to undermine growth potential of drinking yoghurt
Plain yoghurt will continue to rise though faces lurking challenges
Royal FrieslandCampina to remain on top

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023
Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2018-2023
Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023
Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023
Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028
Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers opt for affordable luxury in chilled dairy desserts

Quark benefits from changing dietary patterns

Muller Nederland continues to benefit from Almhof Choco line

PROSPECTS AND OPPORTUNITIES

Prices to reset as quark and luxury chilled desserts enjoy further innovation

Shifts in preferences shape progress and development

Coffee additives to fall further thanks to evolving consumption habits

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2018-2023

Table 70 - Sales of Other Dairy by Category: Value 2018-2023

Table 71 - Sales of Other Dairy by Category: % Volume Growth 2018-2023

Table 72 - Sales of Other Dairy by Category: % Value Growth 2018-2023

Table 73 - Sales of Cream by Type: % Value 2018-2023

Table 74 - NBO Company Shares of Other Dairy: % Value 2019-2023

Table 75 - LBN Brand Shares of Other Dairy: % Value 2020-2023

Table 76 - Distribution of Other Dairy by Format: % Value 2018-2023

Table 77 - Forecast Sales of Other Dairy by Category: Volume 2023-2028

Table 78 - Forecast Sales of Other Dairy by Category: Value 2023-2028

Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028

Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

Plant-Based Dairy in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shelf space gives more room to plant-based variants

Plant-based cheese risers rapidly

Traditional dairy giant turns to plant-based production

PROSPECTS AND OPPORTUNITIES

Growth to slow as maturity sets in

Plant-based milk to move further into the mainstream

All eyes on Royal FrieslandCampina

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2018-2023

Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023

Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2020-2023

Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023

Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023

Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023

Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028

Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2023-2028

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.