

Health and Wellness in the Netherlands

November 2023

Table of Contents

Health and Wellness in the Netherlands

EXECUTIVE SUMMARY

Overview

DISCLAIMER

HW Hot Drinks in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Decline in retail value sales of organic hot drinks in 2022 as consumers resume their pre-pandemic lifestyles and return to their places of work Vegan is the most popular health and wellness claim in health and wellness hot drinks in 2022

Low sugar increasingly important to consumers in health and wellness hot drinks in 2022

PROSPECTS AND OPPORTUNITIES

Rise of single-serve coffee methods leads to contracting sales of no caffeine coffee Plant-based most promising claim in health and wellness hot drinks over the forecast period Good source of minerals has strong potential during the forecast period

CATEGORY DATA

- Table 1 Sales of Hot Drinks by Health and Wellness Type: Value 2019-2022
- Table 2 Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2019-2022
- Table 3 Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 4 Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 5 Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 6 Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 7 Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2019-2022
- Table 8 Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2022-2027
- Table 9 Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2022-2027

HW Soft Drinks in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Much of the retail volume sales gained during the pandemic flow back to the on-trade in 2022 No sugar is the leading claim in health and wellness soft drinks in 2022

Weight management registers positive growth following obesity concerns

PROSPECTS AND OPPORTUNITIES

Major players in health and wellness soft drinks adopt low sugar strategies for continued success No sugar likely to show most promise in health and wellness soft drinks during the forecast period High fibre a good source of potential growth

CATEGORY DATA

- Table 10 Sales of Soft Drinks by Health and Wellness Type: Value 2019-2022
- Table 11 Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2019-2022
- Table 12 Company Shares of No Sugar Soft Drinks (Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 13 Company Shares of Energy Boosting Soft Drinks (2nd Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 14 Company Shares of Natural Soft Drinks (3rd Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 15 Company Shares of Good Source of Vitamins Soft Drinks (4th Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 16 Company Shares of Gluten Free Soft Drinks (5th Biggest HW Type in Global Soft Drinks): % Value 2019-2022
- Table 17 Forecast Sales of Soft Drinks by Health and Wellness Type: Value 2022-2027

Table 18 - Forecast Sales of Soft Drinks by Health and Wellness Type: % Value Growth 2022-2027

HW Snacks in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Vegan snacks enjoys strong growth in 2022 while EU legislation clamps down on trans fats

Gluten free remains the leading claim in health and wellness snacks in 2022

Brain health and memory: A a claim to watch in health and wellness snacks

PROSPECTS AND OPPORTUNITIES

Low sugar snacks declines in popularity while no added sugar booms

Vegan shows the most promise in health and wellness snacks during the forecast period

The influence of the Nutri-Score label shapes consumer purchasing decisions, while Keto benefits from rising obesity and overweight rates

CATEGORY DATA

- Table 19 Sales of Snacks by Health and Wellness Type: Value 2019-2022
- Table 20 Sales of Snacks by Health and Wellness Type: % Value Growth 2019-2022
- Table 21 Company Shares of Gluten Free Snacks (Biggest HW Type in Global Snacks): % Value 2019-2022
- Table 22 Company Shares of Vegetarian Snacks (2nd Biggest HW Type in Global Snacks): % Value 2019-2022
- Table 23 Company Shares of Organic Snacks (3rd Biggest HW Type in Global Snacks): % Value 2019-2022
- Table 24 Company Shares of Vegan Snacks (4th Biggest HW Type in Global Snacks): % Value 2019-2022
- Table 25 Company Shares of No Allergens Snacks (5th Biggest HW Type in Global Snacks): % Value 2019-2022
- Table 26 Forecast Sales of Snacks by Health and Wellness Type: Value 2022-2027
- Table 27 Forecast Sales of Snacks by Health and Wellness Type: % Value Growth 2022-2027

HW Dairy Products and Alternatives in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

High protein dairy products still popular as consumers prioritise health and wellness

Low fat remains the leading health and wellness claim in 2022 while the EU introduces legislation to limit consumption of trans fats

Weight management grows in health and wellness dairy products and alternatives

PROSPECTS AND OPPORTUNITIES

Dairy producers seek out new audiences in a bid to see high protein dairy grow

High protein most promising claim in health and wellness dairy products and alternatives over the forecast period

Low salt claim to see escalating demand over the forecast period

CATEGORY DATA

- Table 28 Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2019-2022
- Table 29 Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2019-2022
- Table 30 Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2019-2022
- 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 2019-2022

Table 35 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2022-2027

Table 36 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2022-2027

HW Cooking Ingredients and Meals in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Young consumers lead the charge in the changing mentality towards vegetarianism, while the EU implements legislation to control trans fats Vegetarian is the leading claim in health and wellness cooking ingredients and meals in 2022 Immune support claim gaining in stature

PROSPECTS AND OPPORTUNITIES

Sales of health and wellness cooking ingredients and meals remain stable despite challenges Vegan most promising in health and wellness cooking ingredients and meals to 2027 Burgeoning interest and demand for plant-based options

MARKET DATA

Table 37 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2019-2022

Table 38 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2019-2022

Table 39 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 40 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 41 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 42 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 43 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2019-2022

Table 44 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2022-2027

Table 45 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2022-2027

HW Staple Foods in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Gluten free staple foods achieves mainstream distribution via supermarkets

Vegan leads health and wellness staple foods in 2022

Growing demand for plant-based alternatives in health and wellness staple foods while EU legislation imposes restrictions on trans fats

PROSPECTS AND OPPORTUNITIES

Education on lactose intolerance is a strong growth driver of lactose free staple foods over the forecast period Vegan to register the strongest performance in health and wellness staple foods over the forecast period No allergens claim expected to gain in popularity in health and wellness staple foods

CATEGORY DATA

Table 46 - Sales of Staple Foods by Health and Wellness Type: Value 2019-2022

Table 47 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2019-2022

Table 48 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 49 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 50 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 51 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 52 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2019-2022

Table 53 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2022-2027

Table 54 - Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2022-2027

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 focusing 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.