



Processed Meat, Seafood and Alternatives To Meat in the Netherlands

November 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

Ingredient inflation and affordability reshape choices across meat and seafood

INDUSTRY PERFORMANCE

Price sensitivity nudges meal composition while plant-forward habits expand

Seafood and substitutes gain from health cues, though processing perceptions linger

WHAT'S NEXT?

Category holds value momentum as consumers rebalance baskets

Health and wellness priorities reinforce the appeal of lean and minimally processed choices

Retailer sustainability pledges accelerate hybrid and plant-forward innovation

COMPETITIVE LANDSCAPE

Private label anchors freshness and value while branded players specialise

Heritage seafood brands leverage health, convenience and modern branding

CHANNELS

Supermarkets broaden leadership through assortment depth and trusted counters

E-commerce gains gradually as fulfilment confidence improves

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in the Netherlands - Industry Overview

EXECUTIVE SUMMARY

Evolving consumer priorities reshape staple food consumption

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Affordability drives demand while health and authenticity gain prominence

Shifting eating habits redefine everyday consumption

WHAT'S NEXT?

Mature category poised for steady growth

Health and wellness trends reshape product development
Authenticity and private label to remain strong competitive forces

COMPETITIVE LANDSCAPE

Artisanal and private label products dominate the market landscape
Authenticity and cultural specialisation underpin brand success

CHANNELS

Supermarkets remain central to staple food retailing
Discounters gain further ground amid affordability concerns

MARKET DATA

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