

Snacks in the Netherlands

June 2023

Table of Contents

Snacks in the Netherlands

EXECUTIVE SUMMARY

Snacks in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for snacks?

MARKET DATA

- Table 1 Sales of Snacks by Category: Volume 2018-2023
- Table 2 Sales of Snacks by Category: Value 2018-2023
- Table 3 Sales of Snacks by Category: % Volume Growth 2018-2023
- Table 4 Sales of Snacks by Category: % Value Growth 2018-2023
- Table 5 NBO Company Shares of Snacks: % Value 2019-2023
- Table 6 LBN Brand Shares of Snacks: % Value 2020-2023
- Table 7 Penetration of Private Label by Category: % Value 2018-2023
- Table 8 Distribution of Snacks by Format: % Value 2018-2023
- Table 9 Forecast Sales of Snacks by Category: Volume 2023-2028
- Table 10 Forecast Sales of Snacks by Category: Value 2023-2028
- Table 11 Forecast Sales of Snacks by Category: % Volume Growth 2023-2028
- Table 12 Forecast Sales of Snacks by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Post-pandemic correction leads to a decline in sales volume of chocolate

Countlines' modest recovery and competitive challenges

Mondelez's support and revamp of Milka chocolate confectionery range

PROSPECTS AND OPPORTUNITIES

Chocolate confectionery poised for stronger growth

Movie nights at home set to drive snack consumption

Plant-based chocolate confectionery gains mainstream appeal

Summary 2 - Other Chocolate Confectionery by Product Type: 2023

CATEGORY DATA

- Table 13 Sales of Chocolate Confectionery by Category: Volume 2018-2023
- Table 14 Sales of Chocolate Confectionery by Category: Value 2018-2023
- Table 15 Sales of Chocolate Confectionery by Category: % Volume Growth 2018-2023
- Table 16 Sales of Chocolate Confectionery by Category: % Value Growth 2018-2023
- Table 17 Sales of Chocolate Tablets by Type: % Value 2018-2023
- Table 18 NBO Company Shares of Chocolate Confectionery: % Value 2019-2023
- Table 19 LBN Brand Shares of Chocolate Confectionery: % Value 2020-2023
- Table 20 Distribution of Chocolate Confectionery by Format: % Value 2018-2023
- Table 21 Forecast Sales of Chocolate Confectionery by Category: Volume 2023-2028
- Table 22 Forecast Sales of Chocolate Confectionery by Category: Value 2023-2028

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2023-2028

Gum in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Decline in gum sales continues despite pandemic recovery

Gum struggles with changing consumer behaviour and declining sales volume

Perfetti van Melle's acquisition strengthens dominance in the gum category

PROSPECTS AND OPPORTUNITIES

Bleak outlook for gum in the forecast period

Growing emphasis on sustainability in gum

Shifting distribution strategies in response to changing retail landscape

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2018-2023

Table 26 - Sales of Gum by Category: Value 2018-2023

Table 27 - Sales of Gum by Category: % Volume Growth 2018-2023

Table 28 - Sales of Gum by Category: % Value Growth 2018-2023

Table 29 - Sales of Gum by Flavour: Rankings 2018-2023

Table 30 - NBO Company Shares of Gum: % Value 2019-2023

Table 31 - LBN Brand Shares of Gum: % Value 2020-2023

Table 32 - Distribution of Gum by Format: % Value 2018-2023

Table 33 - Forecast Sales of Gum by Category: Volume 2023-2028

Table 34 - Forecast Sales of Gum by Category: Value 2023-2028

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2023-2028

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2023-2028

Sugar Confectionery in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sugar confectionery faces turbulent times

Plant-based products drive growth in pastilles, gummies, jellies, and chews

Impulse purchases on the decline in the changing retail landscape

PROSPECTS AND OPPORTUNITIES

Continued growth with a focus on healthier lifestyles

Liquorice faces maturation and competition

Vegan sugar confectionery faces slower growth

Summary 3 - Other Sugar Confectionery by Product Type: 2023

CATEGORY DATA

Table 37 - Sales of Sugar Confectionery by Category: Volume 2018-2023

Table 38 - Sales of Sugar Confectionery by Category: Value 2018-2023

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2018-2023

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2018-2023

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2018-2023

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2019-2023

Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2020-2023

- Table 44 Distribution of Sugar Confectionery by Format: % Value 2018-2023
- Table 45 Forecast Sales of Sugar Confectionery by Category: Volume 2023-2028
- Table 46 Forecast Sales of Sugar Confectionery by Category: Value 2023-2028
- Table 47 Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2023-2028
- Table 48 Forecast Sales of Sugar Confectionery by Category: % Value Growth 2023-2028

Ice Cream in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing demand for gourmet and specialised ice cream

Recovery of impulse ice cream sales

Collaborative launches and social responsibility

PROSPECTS AND OPPORTUNITIES

Changing consumer attitudes and year-round consumption

Growth of dairy ice cream

Impressive growth of plant-based ice cream

CATEGORY DATA

- Table 49 Sales of Ice Cream by Category: Volume 2018-2023
- Table 50 Sales of Ice Cream by Category: Value 2018-2023
- Table 51 Sales of Ice Cream by Category: % Volume Growth 2018-2023
- Table 52 Sales of Ice Cream by Category: % Value Growth 2018-2023
- Table 53 Sales of Ice Cream by Leading Flavours: Rankings 2018-2023
- Table 54 Sales of Impulse Ice Cream by Format: % Value 2018-2023
- Table 55 NBO Company Shares of Ice Cream: % Value 2019-2023
- Table 56 LBN Brand Shares of Ice Cream: % Value 2020-2023
- Table 57 NBO Company Shares of Impulse Ice Cream: % Value 2019-2023
- Table 58 LBN Brand Shares of Impulse Ice Cream: % Value 2020-2023
- Table 59 NBO Company Shares of Take-home Ice Cream: % Value 2019-2023
- Table 60 LBN Brand Shares of Take-home Ice Cream: % Value 2020-2023
- Table 61 Distribution of Ice Cream by Format: % Value 2018-2023
- Table 62 Forecast Sales of Ice Cream by Category: Volume 2023-2028
- Table 63 Forecast Sales of Ice Cream by Category: Value 2023-2028
- Table 64 Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028
- Table 65 Forecast Sales of Ice Cream by Category: % Value Growth 2023-2028

Savoury Snacks in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures boost value sales of savoury snacks while volume sales decline

A downward trend in tortilla chips

Declining market share for Duyvis in nuts, seeds, and trail mixes

PROSPECTS AND OPPORTUNITIES

Modest volume growth for savoury snacks

Limited innovations in savoury snacks

Recovery and focus on top performers in nuts, seeds, and trail mixes

Summary 4 - Other Savoury Snacks by Product Type: 2023

CATEGORY DATA

- Table 66 Sales of Savoury Snacks by Category: Volume 2018-2023
- Table 67 Sales of Savoury Snacks by Category: Value 2018-2023
- Table 68 Sales of Savoury Snacks by Category: % Volume Growth 2018-2023
- Table 69 Sales of Savoury Snacks by Category: % Value Growth 2018-2023
- Table 70 NBO Company Shares of Savoury Snacks: % Value 2019-2023
- Table 71 LBN Brand Shares of Savoury Snacks: % Value 2020-2023
- Table 72 Distribution of Savoury Snacks by Format: % Value 2018-2023
- Table 73 Forecast Sales of Savoury Snacks by Category: Volume 2023-2028
- Table 74 Forecast Sales of Savoury Snacks by Category: Value 2023-2028
- Table 75 Forecast Sales of Savoury Snacks by Category: % Volume Growth 2023-2028
- Table 76 Forecast Sales of Savoury Snacks by Category: % Value Growth 2023-2028

Sweet Biscuits, Snack Bars and Fruit Snacks in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising costs and price increases

Growth of snack bars, particularly protein bars

Diverging into chocolate coated biscuits

PROSPECTS AND OPPORTUNITIES

Minimal volume growth and increased value sales

Minimal volume growth in sweet biscuits with the exception of chocolate-coated biscuits and cookies

Conflicting trends of indulgence and healthier alternatives

CATEGORY DATA

- Table 77 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2018-2023
- Table 78 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2018-2023
- Table 79 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2018-2023
- Table 80 Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2018-2023
- Table 81 NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2023
- Table 82 LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2023
- Table 83 NBO Company Shares of Sweet Biscuits: % Value 2019-2023
- Table 84 LBN Brand Shares of Sweet Biscuits: % Value 2020-2023
- Table 85 NBO Company Shares of Snack Bars: % Value 2019-2023
- Table 86 LBN Brand Shares of Snack Bars: % Value 2020-2023
- Table 87 NBO Company Shares of Fruit Snacks: % Value 2019-2023
- Table 88 LBN Brand Shares of Fruit Snacks: % Value 2020-2023
- Table 89 Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2018-2023
- Table 90 Distribution of Sweet Biscuits by Format: % Value 2018-2023
- Table 91 Distribution of Snack Bars by Format: % Value 2018-2023
- Table 92 Distribution of Fruit Snacks by Format: % Value 2018-2023
- Table 93 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2023-2028
- Table 94 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2023-2028
- Table 95 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2023-2028
- Table 96 Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2023-2028

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.