



Euromonitor
International

Soft Drinks in the Netherlands

November 2024

Table of Contents

EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

APPENDIX

Fountain sales in the Netherlands

DISCLAIMER

SOURCES

Bottled Water in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Natural bottled mineral water sees reduction in consumption tax
- Natural bottled mineral water volume sales soar due to tax decline
- Spadel Nederland NV targets adults seeking non-alcoholic alternatives

PROSPECTS AND OPPORTUNITIES

- Outlook for bottled water is broadly optimistic
- Scrapping consumption tax will have some long term effect
- Spadel Nederland NV will see private label as its main challenger

CATEGORY DATA

- Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024
- Table 38 - Off-trade Sales of Bottled Water by Category: Value 2019-2024
- Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024
- Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024
- Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024
- Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024
- Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024
- Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024
- Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029
- Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029
- Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029
- Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

Carbonates in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

- New consumption tax hits carbonates sales hard
- Zero sugar variants are now the flagship product for most brands
- Pepsi overhauls its brand alongside roll out of Pepsi Zero Sugar

PROSPECTS AND OPPORTUNITIES

- Carbonates face limited growth prospects
- Shift towards reduced sugar carbonates continues
- International players dominate amid opportunities for premium products

CATEGORY DATA

- Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024
- Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024
- Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024
- Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024
- Table 53 - Off-trade Sales of Carbonates by Category: Volume 2019-2024
- Table 54 - Off-trade Sales of Carbonates by Category: Value 2019-2024
- Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024
- Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
- Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

Concentrates in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increase in average unit prices leads to lower sales volume

Reduced sugar liquid concentrates gain share

Raak outperforms other liquid concentrate brands

PROSPECTS AND OPPORTUNITIES

Modest recovery for liquid concentrates

Popularity of zero sugar will drive some growth

HJ Heinz BV expected to see share fall

CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 71 - Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

Juice in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

High sugar content curbs appetite for juice

Strong decline in volume as producers struggle to deal with new tax

Riedel launches Appelsientje juice range with added dairy thereby avoiding sugar tax

PROSPECTS AND OPPORTUNITIES

Outlook for juice remains broadly negative
Positive outlook for not from concentrate 100% juice
Riedel Drankenindustrie BV will remain dominant

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2019-2024
Table 85 - Off-trade Sales of Juice by Category: Value 2019-2024
Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024
Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024
Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024
Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024
Table 90 - NBO Company Shares of Off-trade Juice: % Value 2020-2024
Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024
Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029
Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029
Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029
Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

RTD Coffee in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

RTD coffee thrives even as volume growth slows
Major players seek new consumption occasions
Arla Foods BV extends Starbucks RTD coffee portfolio

PROSPECTS AND OPPORTUNITIES

RTD coffee faces robust performance
Health concerns could hold back growth of RTD coffee
Launch of high protein products could be interesting route to growth

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2019-2024
Table 97 - Off-trade Sales of RTD Coffee: Value 2019-2024
Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024
Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024
Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024
Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024
Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024
Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024
Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029
Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029
Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029
Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

RTD Tea in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Prices soar due to increase in consumption tax
Reduced sugar still RTD tea outperforms regular still RTD tea

Increased competition from new hybrid soft drinks containing RTD tea

PROSPECTS AND OPPORTUNITIES

RTD Tea volumes expected to make recovery

Reduced still RTD tea will drive growth over forecast period

Kombucha and other niches will do well

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Energy Drinks in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Volume growth slows amid tax hikes

Deposit system for metal beverage cans yields negative impact

Speciality flavours prove popular in energy drinks

PROSPECTS AND OPPORTUNITIES

Positive outlook even as energy drinks category matures

Recent regulatory changes will continue to have impact

Red Bull to dominate despite challenger brands

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

Sports Drinks in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sports drinks consumption remains under pressure
Major players diversify their brand portfolios
Coca-Cola Enterprises Nederland BV injects much needed investment

PROSPECTS AND OPPORTUNITIES

Modest volume increase expected as sports drinks see further recovery
Major brands will continue to diversify portfolios to cater to specific needs
Investment from Coca-Cola Enterprises Nederland BV will support category growth

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2019-2024
Table 134 - Off-trade Sales of Sports Drinks: Value 2019-2024
Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024
Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024
Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024
Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024
Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024
Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024
Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029
Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029
Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029
Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

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/soft-drinks-in-the-netherlands/report.