

# Soft Drinks in the Netherlands

November 2025

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#### Soft Drinks in the Netherlands

#### **EXECUTIVE SUMMARY**

Soft drinks seeing an upturn

#### **KEY DATA FINDINGS**

#### INDUSTRY PERFORMANCE

Weather conditions boost demand, but price rises constrain growth Shift towards healthier products and marketing tie-ins

#### WHAT'S NEXT?

Manufacturers need to focus on value
Health and wellness to remain key
Red Bull challenging Coca-Cola for top spot

#### COMPETITIVE LANDSCAPE

Coca-Cola holds presence across soft drinks

Smaller local companies benefit from clean, modern design and transparency

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Supermarkets dominates distribution of soft drinks
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Foodservice vs retail split

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Warm summer weather boosts sales

Functional bottled water spurs growth

# WHAT'S NEXT?

Changes in consumer habits will boost performance of bottled water

Systems for home carbonation will become an even more popular alternative to bottled water

Consumers will demand more transparency

#### COMPETITIVE LANDSCAPE

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#### **KEY DATA FINDINGS**

#### 2025 DEVELOPMENTS

Increasingly targeting adults

#### INDUSTRY PERFORMANCE

Warm weather in spring and summer helps category to achieve growth Growing interest in reduced sugar orange carbonates

# WHAT'S NEXT?

Very modest growth expected

Producers develop new concepts to steal consumers from alcoholic drinks category

Reduced sugar variants will see further growth, but regular variants will compete

## COMPETITIVE LANDSCAPE

Coca-Cola launches new flavour variants for its popular carbonates brands

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# KEY DATA FINDINGS

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## INDUSTRY PERFORMANCE

Concentrates still seen as offering value for money

Liquid concentrates benefits from home carbonation

#### WHAT'S NEXT?

Maturity of liquid concentrates will limit volume growth

More opportunities for distribution through discounters

Development of new reduced sugar concentrates could be an opportunity to attract new consumers

#### COMPETITIVE LANDSCAPE

Consumers switch to Raak because of its affordability

D-Drinks appeals to health-conscious consumers

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Juice affected by price rises and high sugar content

## INDUSTRY PERFORMANCE

Juice suffering from a spike in the cost of fruit

Premium and health-orientated products more resilient

#### WHAT'S NEXT?

Juice set to continue to struggle

Functional products could help to revitalise the category

Dutch Government intends to close tax loophole

#### COMPETITIVE LANDSCAPE

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#### RTD Coffee in the Netherlands

#### **KEY DATA FINDINGS**

#### 2025 DEVELOPMENTS

RTD coffee thriving despite price increases

# INDUSTRY PERFORMANCE

RTD coffee hit by price increases

RTD coffee is hot in the Netherlands

# WHAT'S NEXT?

Strong growth expected for RTD coffee

Consumers more aware of sustainability issues around coffee

RTD coffee will grow into a mainstream category if it can reach consumers outside the major urban areas

# COMPETITIVE LANDSCAPE

Starbucks leads the way

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# 2025 DEVELOPMENTS

Health exerts a strong influence on category development

#### INDUSTRY PERFORMANCE

Decline of carbonated products a constraint on overall category performance
Still takes share from carbonated, but kombucha continues to attract health-conscious consumers

#### WHAT'S NEXT?

RTD tea enters new phase in its development, kombucha can expand distribution Reduced sugar options will outperform regular variants, but growth will be slower Natural image of RTD tea could limit potential for functional innovation

## COMPETITIVE LANDSCAPE

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Consumers becoming more accepting of functional products

#### INDUSTRY PERFORMANCE

Energy drinks continues to perform well

Strong growth for reduced sugar variants

#### WHAT'S NEXT?

Positive outlook for energy drinks

Energy drinks will profit from general interest in functional products

Stricter legislation on energy drinks remains a threat

## COMPETITIVE LANDSCAPE

Red Bull remains dominant

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# 2025 DEVELOPMENTS

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# INDUSTRY PERFORMANCE

Sports drinks appears to be turning corner

Sports drinks benefiting from broader interest in functional food and drink

#### WHAT'S NEXT?

Very positive outlook for sports drinks

The success of related categories will bring new opportunities for sports drinks

Growing interest in preventative health will help the growth of sports drinks

# COMPETITIVE LANDSCAPE

United Soft Drinks leads the way

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