



Coffee in the Netherlands

December 2025

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Coffee in the Netherlands - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sharp price increases affect consumer behaviour

INDUSTRY PERFORMANCE

Producers increase the use of Robusta beans to curb price increases

Fresh coffee beans bucks trend of volume decline

WHAT'S NEXT?

General price level of coffee will remain high

Technological developments in coffee machines and hard pods will influence the development of the coffee category

Producers will have to be more open about the sourcing of coffee beans

COMPETITIVE LANDSCAPE

Conflicts with Jumbo and Picnic take their toll on Douwe Egberts

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CHANNELS

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Discounters gaining share

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Hot Drinks in the Netherlands - Industry Overview

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Price increases reshaping consumption patterns

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Volumes falling

Price rises limiting growth potential of premium products

WHAT'S NEXT?

Changing consumption habits

Douwe Egberts likely to retain lead, but faces growing competition

Growing focus on sustainability

COMPETITIVE LANDSCAPE

Douwe Egberts faces ongoing issues due to its relationship with major retailers

Smaller players seeing strong growth

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Supermarkets dominant, but suffering from changing market dynamics

Discounters registering increase in share

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