



Staple Foods in the Netherlands

November 2025

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Staple Foods in the Netherlands

EXECUTIVE SUMMARY

Evolving consumer priorities reshape staple food consumption

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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

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Discounters gain further ground amid affordability concerns

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Cocoa and sugar volatility influences product mix and pricing strategies

INDUSTRY PERFORMANCE

Cost pressures persist but affordability and innovation sustain demand

Flat bread benefits from changing meal habits and cultural diversification

WHAT'S NEXT?

Premiumisation and diversification expected to define category growth
Health and wellness priorities shape innovation and positioning
Sustainability and local sourcing reinforce the category's positive image

COMPETITIVE LANDSCAPE

Artisanal bakeries maintain strong influence despite retail expansion
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[Breakfast Cereals in the Netherlands](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation offsets volume stagnation as sugar concerns persist

INDUSTRY PERFORMANCE

Consumers question health credentials but still value convenience
Muesli and granola outperform traditional flakes amid health redefinitions

WHAT'S NEXT?

Gradual recovery expected as perception of health improves
Functional benefits drive next wave of innovation
Sports nutrition brands intensify competitive pressure

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Changing food culture reshapes consumption occasions and category dynamics

Frozen formats outperform as consumers prioritise freshness and practicality

WHAT'S NEXT?

Health-driven demand and retailer commitments to plant-based foods sustain growth

Legumes and simple vegetables attract attention for functional benefits

Sustainability commitments drive local sourcing and organic expansion

COMPETITIVE LANDSCAPE

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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

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[Rice, Pasta and Noodles in the Netherlands](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cultural diversity and culinary curiosity sustain strong growth across rice, pasta and noodles

INDUSTRY PERFORMANCE

Premiumisation and culinary sophistication drive growth despite cost pressures

Asian cuisine and youth culture boost rice and noodles consumption

WHAT'S NEXT?

Positive outlook sustained by cultural diversity and product innovation

Sustainability and ethical sourcing shape future purchasing decisions

Demographic change and convenience trends inspire new formats and portioning

COMPETITIVE LANDSCAPE

GranFood maintains leadership but faces pressure from premium and authentic brands
Authenticity drives competition across pasta and rice segments

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