Staple Foods in the Netherlands

November 2025

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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
Private label strengthens bakery credentials through value and freshness

CHANNELS

Food specialists retain a strong presence through artisanal appeal
Convenience stores gain traction with ready-to-eat baked goods

CATEGORY DATA

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COUNTRY REPORTS DISCLAIMER

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

Established leaders face stagnation amid image challenges
Holie Foods disrupts the category with health-first positioning

CHANNELS

Supermarkets consolidate dominance with diversified assortments
E-commerce strengthens as consumers embrace convenience

CATEGORY DATA

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2025 DEVELOPMENTS

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

Private label anchors freshness and value while branded players specialise

Heritage seafood brands leverage health, convenience and modern branding

CHANNELS

Supermarkets broaden leadership through assortment depth and trusted counters

E-commerce gains gradually as fulfilment confidence improves

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

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

CHANNELS

Supermarkets consolidate dominance through premium and authentic assortments
E-commerce expands niche availability and caters to specialist demand

CATEGORY DATA