

Cooking Ingredients and Meals in the Netherlands

November 2025

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EXECUTIVE SUMMARY

Price increases boost value sales but so does premiumisation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Consumers are increasingly interested in health and wellness Convergence of trends

WHAT'S NEXT?

Positive outlook supported by demand for convenience Health and wellness trend to exert growing influence Potential threat from supply chain volatility

COMPETITIVE LANDSCAPE

Important role for private label

Major brand manufacturers experience contrasting fortunes

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Premiumisation boosts sales but price rises remain challenging

INDUSTRY PERFORMANCE

Unit price development remains a major issue for edible oils Olive oil volume sales return to growth

WHAT'S NEXT?

Higher average unit prices will drive value growth Health trends will shape developments in edible oil Rapeseed oil presents more sustainable alternative

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Categories which are seen as fresh and high quality record the strongest performance Chilled soup sees strong growth

WHAT'S NEXT?

The outlook for meals and soups is positive

Dutch consumers become more open-minded about meals and soups with functional benefits Improved quality at lower price levels will drive consumers from foodservice to retail

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Sales volume remains stable, while category shows value growth Mayonnaise benefits from new flavours

WHAT'S NEXT?

New uses of mayonnaise will help to drive sales volume growth Consumers will be interested in products with a more natural functionality Raised awareness of sustainability issues will shape the category

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INDUSTRY PERFORMANCE

Shifting consumption patterns

Expansion of chocolate spreads

WHAT'S NEXT?

Volatility will lead to higher costs and higher consumer prices

Development of sweet spreads will be shaped by two opposing trends

Consumers will avoid products that they consider to be harmful to the planet or harmful to their health

COMPETITIVE LANDSCAPE

Unilever leads the way because of its dominance in peanut butter

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Larger households with children appreciate the convenience of ordering sweet spreads online

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