



# Netherlands plant-based food retail market insights

2020-2022



## Executive Summary

Retail sales data from NielsenIQ covering 13 European countries shows that sales of plant-based foods have grown 6% in 2022 – and 21% since 2020 – to reach €5.8 billion.

The global shift towards plant-based diets has sparked a revolution in the food industry, with major food manufacturers and retailers embracing the change. In Europe, plant-based food retail sales have surged in recent years as new products and innovations have come to market, enabling more consumers to purchase next-generation plant-based meat, seafood, eggs and dairy that are competitive with animal products on taste, price and convenience.

### **Plant-based foods in Europe are a €5.8 billion market.**

The Good Food Institute Europe analysed NielsenIQ plant-based data for 13 European countries – Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and the UK – to calculate the size and growth of the plant-based food retail market from 2020 to 2022.

**€5.8 billion**

The retail market for plant-based foods is worth €5.8 billion, up from €4.8 billion in 2020.

**+6%**

The value of plant-based food sales grew by 6% between 2021 and 2022.

**+4%**

Plant-based food unit sales grew by 4% between 2021 and 2022.

**21%**

Plant-based food euro sales and unit sales grew by 21% between 2020 and 2022.

To contextualise the sales performance of plant-based categories in 2022, it is important to note the unique macroeconomic environment that was present due to the ongoing war in Ukraine, global trade tensions, and inflation. While the growth of the plant-based food retail market decelerated in 2022 compared to 2021, both euro and unit sales continued to grow, demonstrating strong demand from consumers for these products despite these challenges.

## Overview of Europe-wide plant-based category sales summary, 2022

	2022 sales value	2021-2022 sales growth	2020-2022 sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Milk	€2.2 B	7%	19%	1.3 B	6%	20%
Meat	€2.0 B	3%	19%	846 M	1%	21%
Yoghurt	€515 M	-0.4%	8%	255 M	-3%	10%
Spreads	€247 M	13%	40%	140 M	4%	26%
Meals	€181 M	20%	79%	72 M	14%	71%
Ice cream	€174 M	8%	14%	57 M	8%	15%
Cheese	€165 M	4%	56%	61 M	4%	62%
Cream	€139 M	7%	7%	109 M	0%	1%
Dessert	€88 M	6%	27%	58 M	5%	40%
Seafood	€43 M	60%	326%	14 M	67%	343%
<b>Total</b>	<b>€5.8 B</b>	<b>6%</b>	<b>21%</b>	<b>2.9 B</b>	<b>4%</b>	<b>21%</b>

### Plant-based foods in the Netherlands are a €411.4 million market.

The Dutch plant-based food retail market is the sixth largest in Europe, and Dutch consumers have the highest per capita consumption rates of plant-based foods. This is in line with overall sales trends in the Netherlands, where sales of plant-based foods grew by 9% between 2020 and 2022 to €441.4 million.

Plant-based meat is the most developed category in the Netherlands, although sales declined in 2022. The value of plant-based milk sales continued to increase, growing by 14% between 2020 and 2022. One of the least developed categories, but the fastest growing, is plant-based cheese.

Dive into the report to better understand the Dutch plant-based food retail market and how plant-based foods are growing in comparison to animal-based foods.

**Addendum: In April 2023, we discovered some errors on the part of our data partner for the UK plant-based cheese, yoghurt, and dessert categories and the Poland plant-based cheese category. In this report, the executive summary, overall plant-based food country comparison charts, plant-based cheese country comparison charts, and plant-based yoghurt country comparison charts have been updated with the correct sales figures.**

# Table of contents

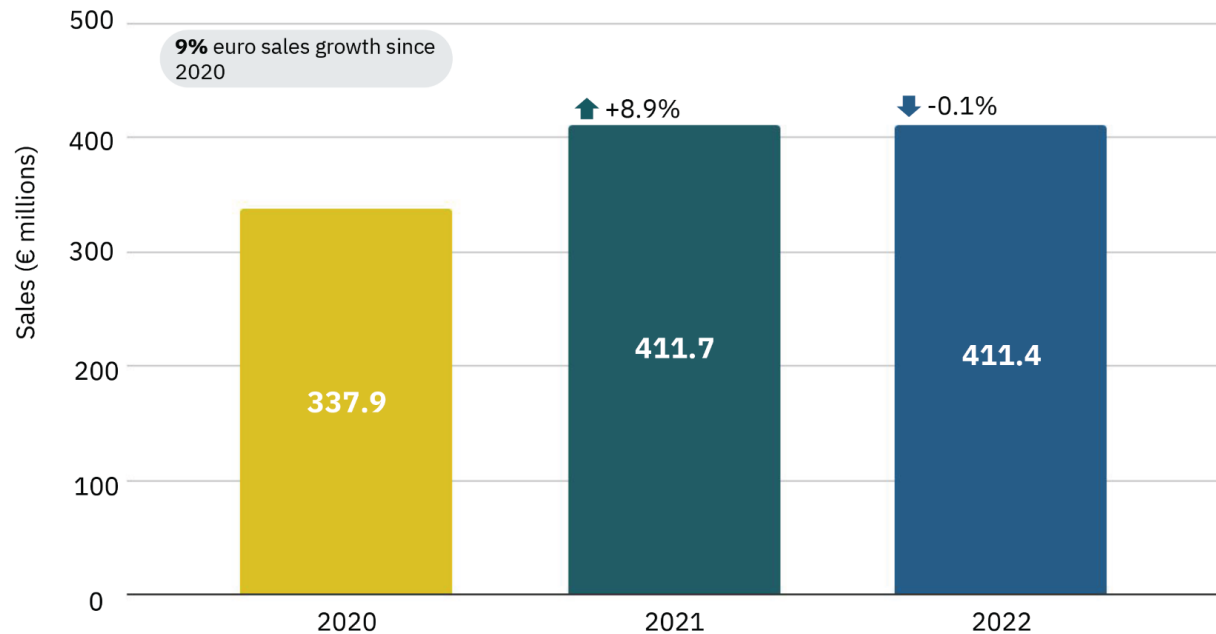
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<b>Overall plant-based food market</b>	<b>5</b>
Categories	5
Country comparison	7
Comparison to animal-based foods	8
<b>Plant-based meat</b>	<b>9</b>
<b>Plant-based milk</b>	<b>12</b>
<b>Plant-based cheese</b>	<b>14</b>
<b>Plant-based yoghurt</b>	<b>16</b>
<b>Plant-based cream</b>	<b>18</b>
<b>Plant-based dessert</b>	<b>19</b>
<b>Conclusion</b>	<b>20</b>
<b>About the data</b>	<b>21</b>

## Overall plant-based food market

Plant-based food sales in the Netherlands declined by 0.1% in 2022 to €411.4 million.

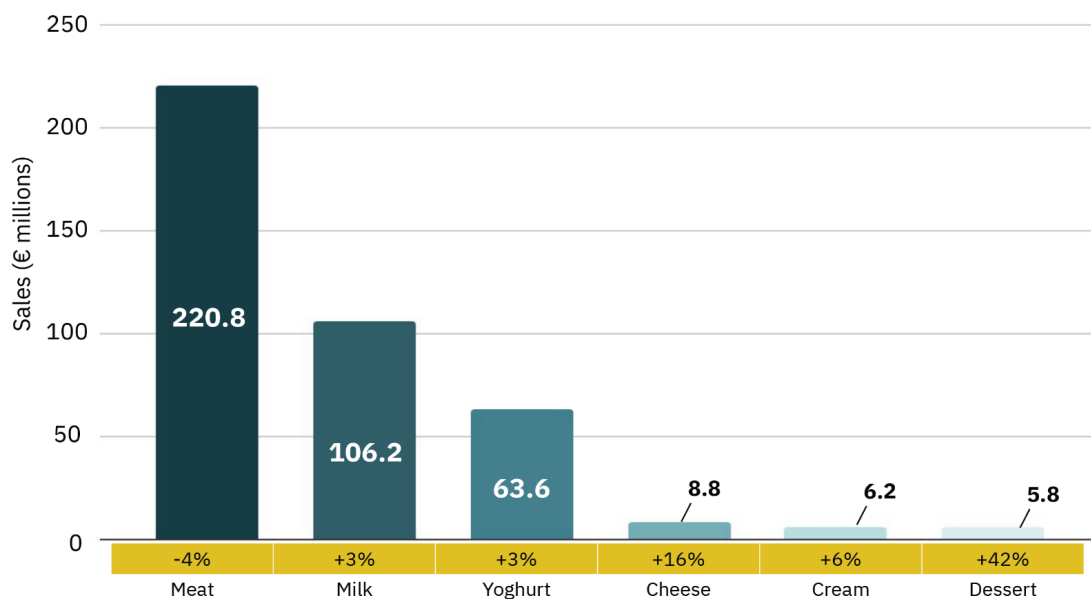
### Netherlands plant-based foods sales (in € millions), 2022



### Categories

Plant-based categories are in various stages of development.

### Netherlands plant-based foods sales by category (in € millions), 2022



## Key insights:

- **Plant-based meat is the most developed of all plant-based categories,** although in 2022 the value of plant-based meat sales declined by 4%, and unit sales declined by 5%. This is in line with the animal-based meat category where unit sales also declined by 6%.
- **Plant-based milk sales continued to increase, totalling €106.2 million in 2022,** representing growth of 14% between 2020 and 2022.
- **One of the least developed categories, but the fastest growing, is plant-based cheese.** At €8.8 million in sales in 2022, plant-based cheese is still a small category but growing rapidly, with more than 60% growth since 2020.

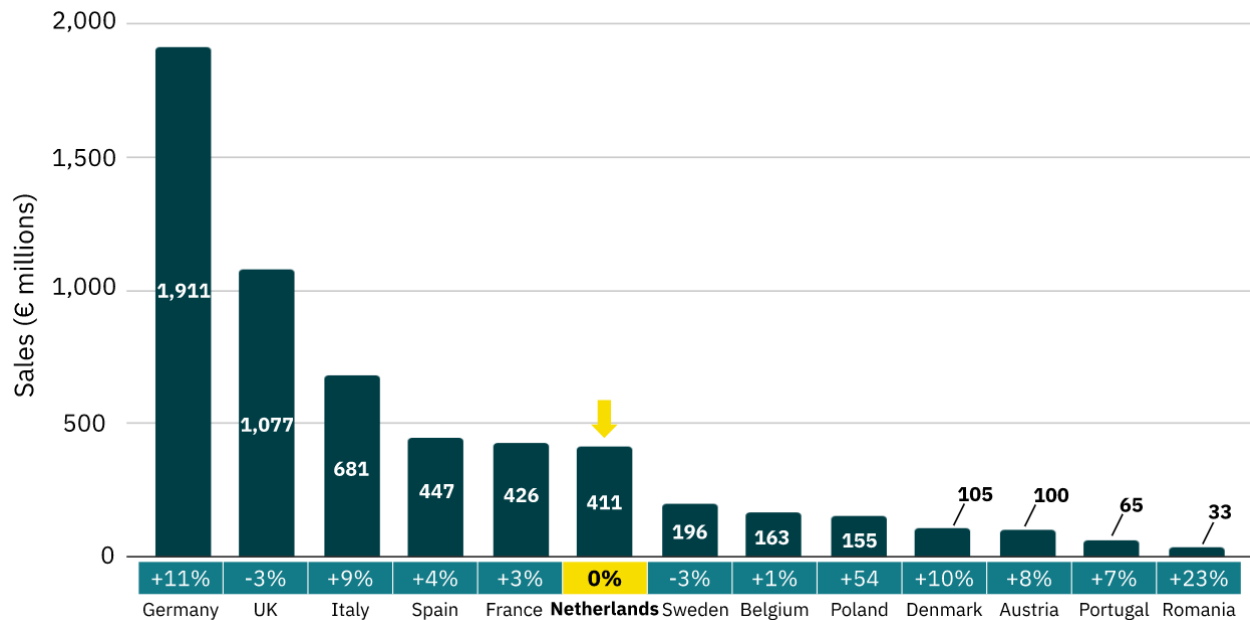
## Netherlands plant-based category sales summary, 2022

	2022 euro sales	2021-2022 euro sales growth	2020-2022 euro sales growth	2022 unit sales	Unit sales growth (21-22)	Unit sales growth (20-22)
Meat	€220.8 M	-4%	2%	97 M	-5%	5%
Milk	€106.2 M	3%	14%	63.8 M	-0.5%	14%
Yoghurt	€63.6 M	3%	16%	33 M	-3%	13%
Cheese	€8.8 M	16%	60%	NA	–	–
Cream	€6.2 M	6%	30%	4.7 M	6%	41%
Dessert	€5.8 M	42%	55%	3.5 M	37%	55%
<b>Total</b>	<b>€411.4 M</b>	<b>-0.1%</b>	<b>8.9%</b>	<b>202 M</b>	<b>-2.5%</b>	<b>10%</b>

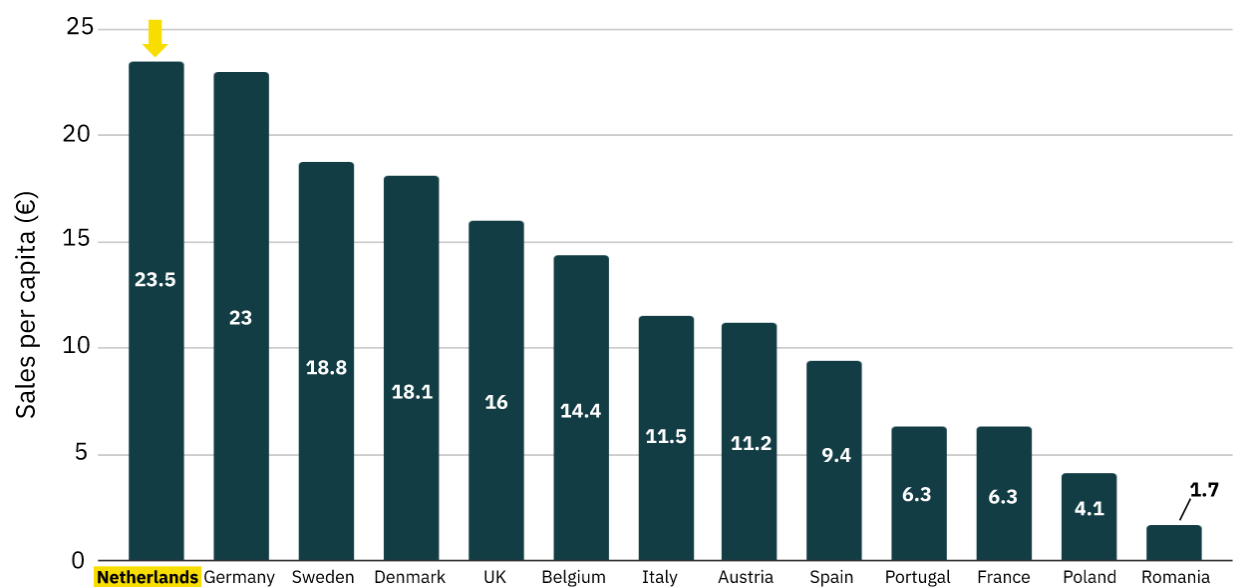
## Country comparison

The Netherlands has the sixth highest plant-based food sales value in Europe. However, the Netherlands has the highest average plant-based food spend per capita.

### Europe-wide plant-based food sales by country (in € millions), 2022

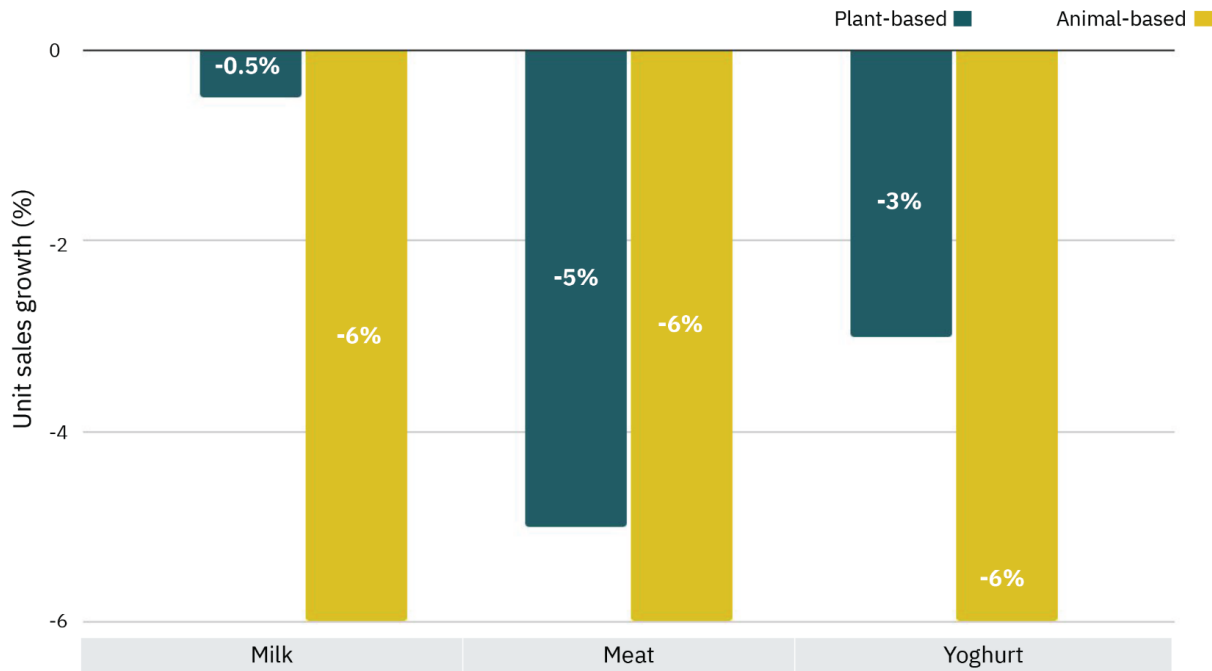


### Europe-wide average plant-based food spend per country per capita (in euros), 2022



## Comparison to animal-based foods

### Netherlands plant-based vs animal-based category unit sales growth, 2022<sup>1</sup>



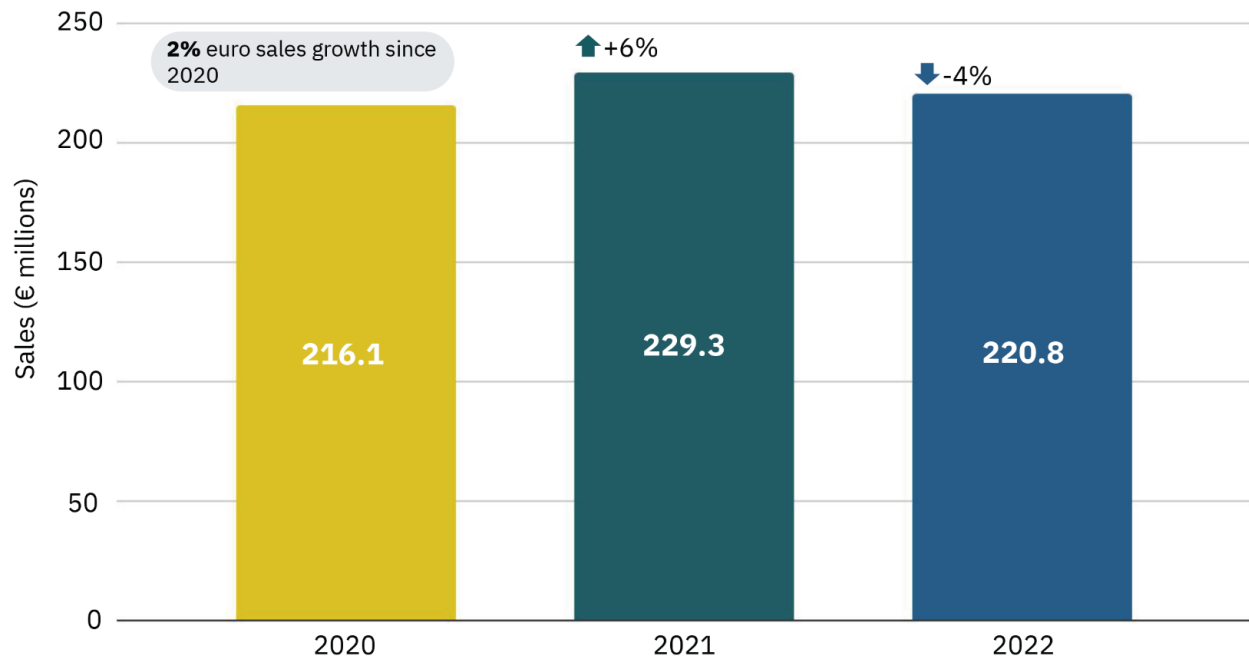
To compare the growth of plant-based versus animal-based categories, we compared unit sales (instead of sales by value) as it provides a more direct comparison. In 2022, unit sales growth of both plant-based and animal-based milk, meat, and yoghurt categories declined.

<sup>1</sup> Unit sales for plant-based cheese not available.



# Plant-based meat<sup>2</sup>

## Netherlands plant-based meat sales (in € millions), 2020-2022



### Key insights:

- The value of plant-based meat sales increased by 2% between 2020 and 2022, while total unit sales for plant-based meat increased by 5%.
- In comparison, pre-packaged conventional meat unit sales decreased by 11% between 2020 and 2022.
- In terms of average price per unit, the plant-based meat category was less impacted by inflation and price increases in 2022. Plant-based meat prices increased by 1%, whereas pre-packaged conventional meat prices increased by 12%.
- In 2022, plant-based meat had a 7% market share of the total retail pre-packaged meat category.<sup>3</sup>

<sup>2</sup> The plant-based meat category includes both analogues (products that mimic the appearance and taste of animal-based meat) and non-analogues (e.g. vegetable-based patties).

<sup>3</sup> Nielsen only reports on pre-packaged animal-based meat sales, therefore the market share calculation is only for the pre-packaged meat category.

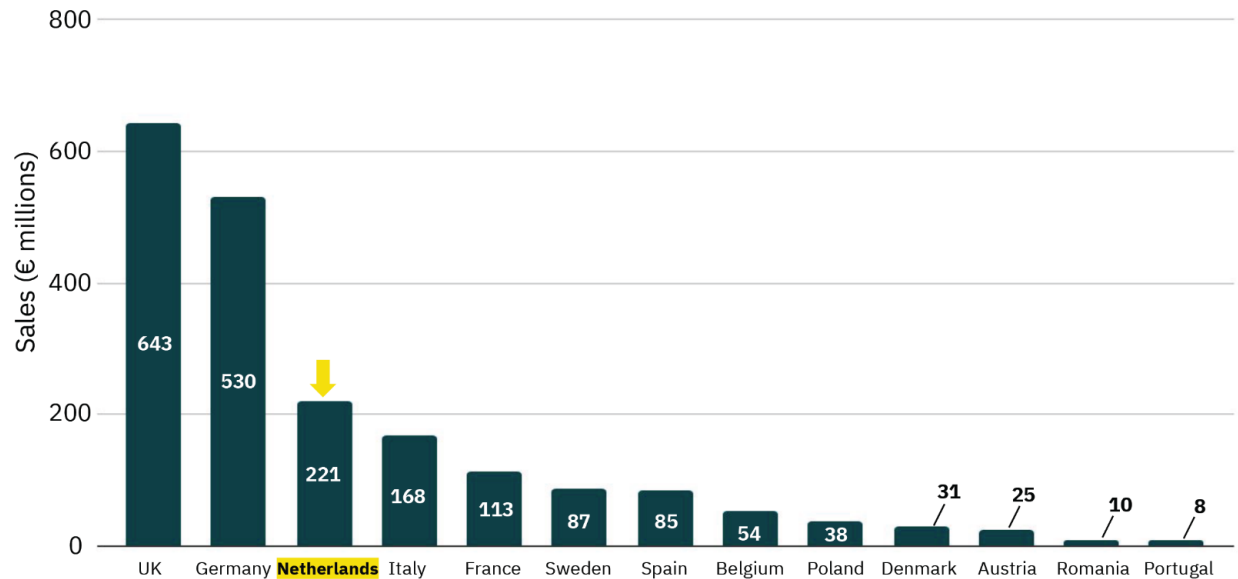
### Segment insights:

- Refrigerated plant-based meat makes up the majority of the category by sales value in 2022, representing 93% of total plant-based meat sales, whereas frozen and shelf-stable plant-based meat makes up 5% and 2% respectively.
- The most popular plant-based meat formats are pieces (making up 24% of sales value), followed by schnitzel (17%), burgers (14%) and meatballs (11%).

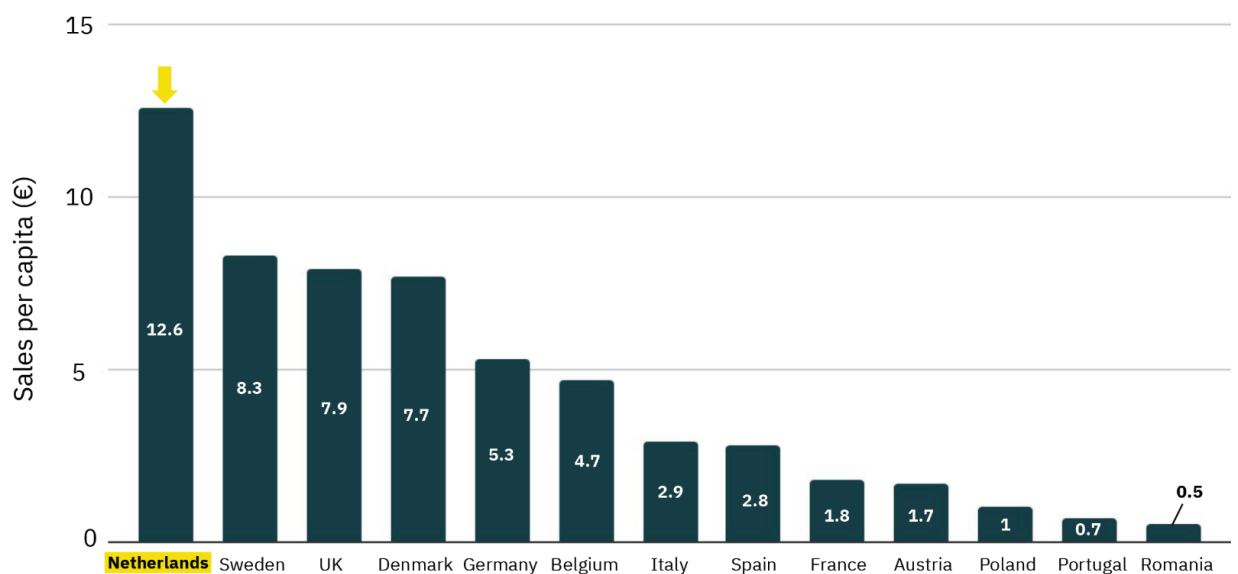
## Country comparison

The Netherlands has the third highest plant-based meat sales value in Europe and the highest average plant-based meat spend per capita.

### Europe-wide plant-based meat sales per country (in € millions), 2022

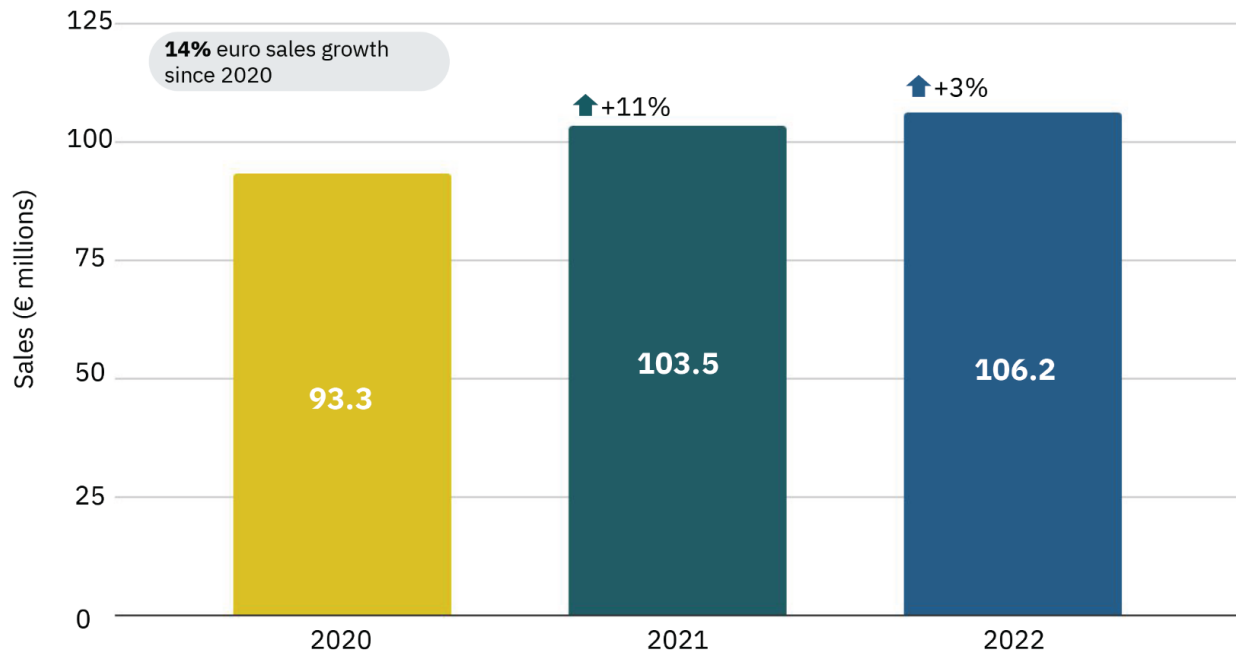


### Europe-wide average plant-based meat spend per country per capita (in euros), 2022



# Plant-based milk

## Netherlands plant-based milk sales (in € millions), 2020-2022



### Key insights:

- Plant-based milk sales increased by 14% in terms of both value and unit sales between 2020 and 2022.
- In comparison, conventional milk unit sales decreased by 13% between 2020 and 2022.
- In terms of average price per unit, the plant-based milk category was less impacted by inflation and price increases in 2022. Plant-based milk prices increased by 3%, whereas conventional milk prices increased by 14%.
- In 2022, plant-based milk had a 12% market share of the total milk category.

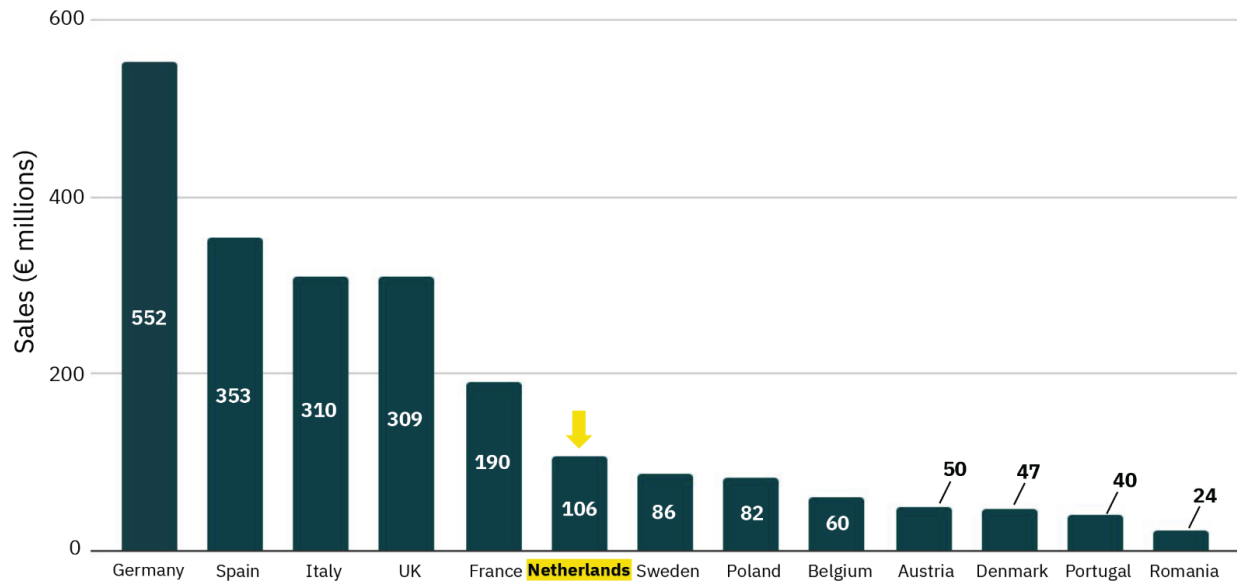
### Segment insights:

- Oat milk is the category leader with 40% of category sales value in 2022, followed by soy milk (28%) and almond milk (21%). Oat milk is also the only segment experiencing growth, whereas the value of both soy and almond milk sales declined.
- Plain milk makes up 89% of total plant-based milk sales value in 2022, while flavoured milk and other milk-based beverages comprise 11%.

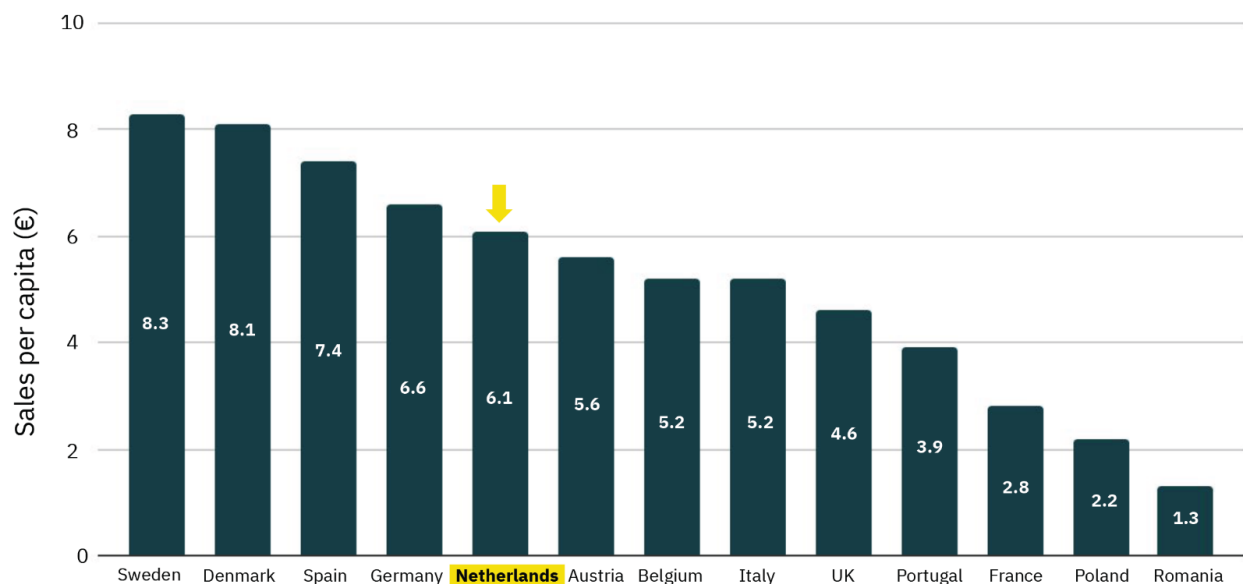
## Country comparison

The Netherlands has the sixth highest plant-based milk euro sales in Europe and the fifth highest average plant-based milk euro spend per capita.

### Europe-wide plant-based milk sales per country (in € millions), 2022

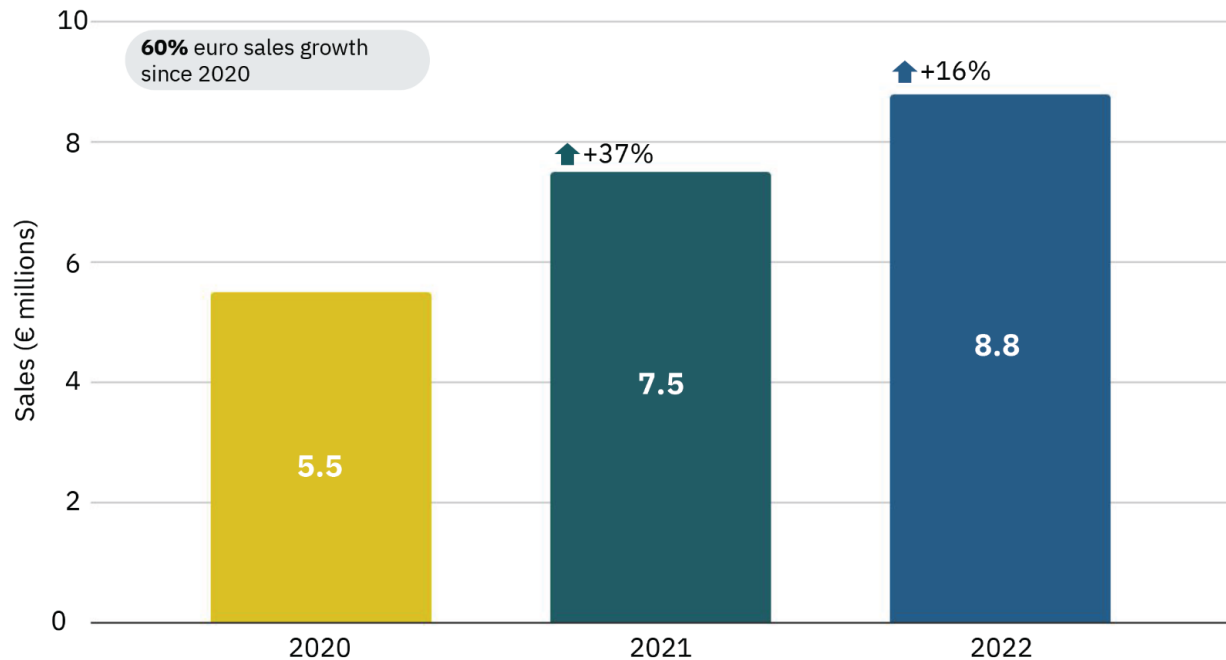


### Europe-wide average plant-based milk spend per country per capita (in euros), 2022



# Plant-based cheese

## Netherlands plant-based cheese sales (in € millions), 2020-2022



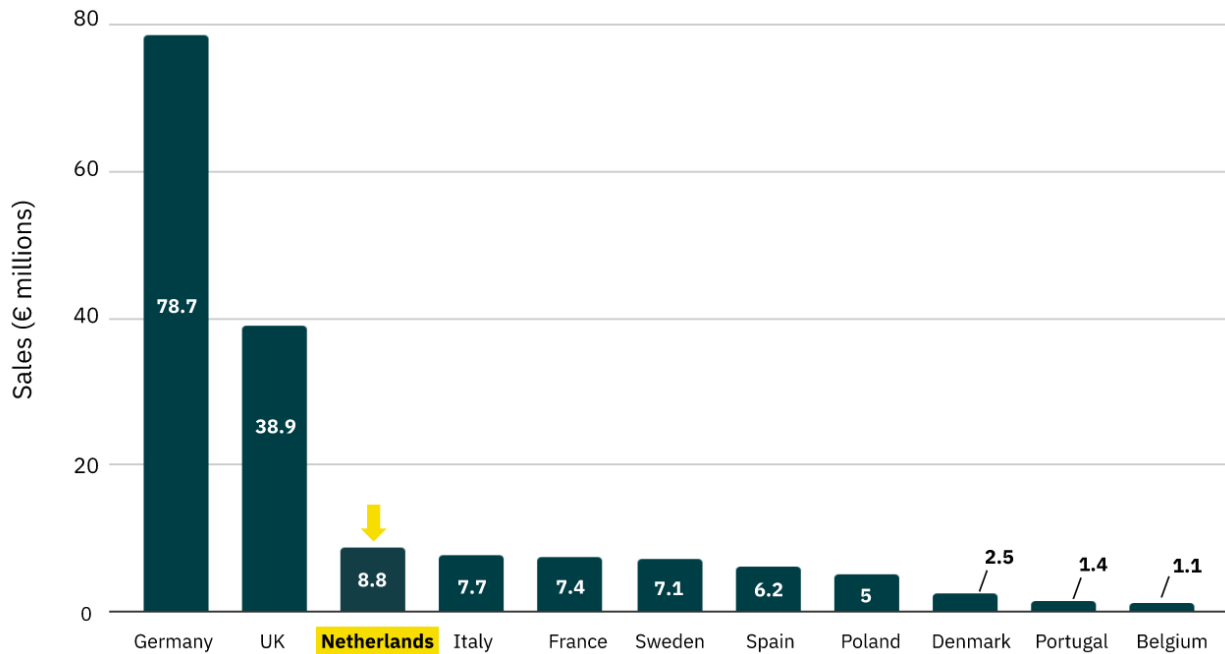
### Key insights:

- The value of plant-based cheese sales increased by 60% between 2020 and 2022.
- While there is no data available on plant-based cheese unit sales and the average price per unit, conventional cheese unit sales decreased by 5% between 2020 and 2022 and the average price per unit of conventional cheese increased by 16% in 2022.
- In 2022, plant-based cheese had a 1% market share of the total cheese category.

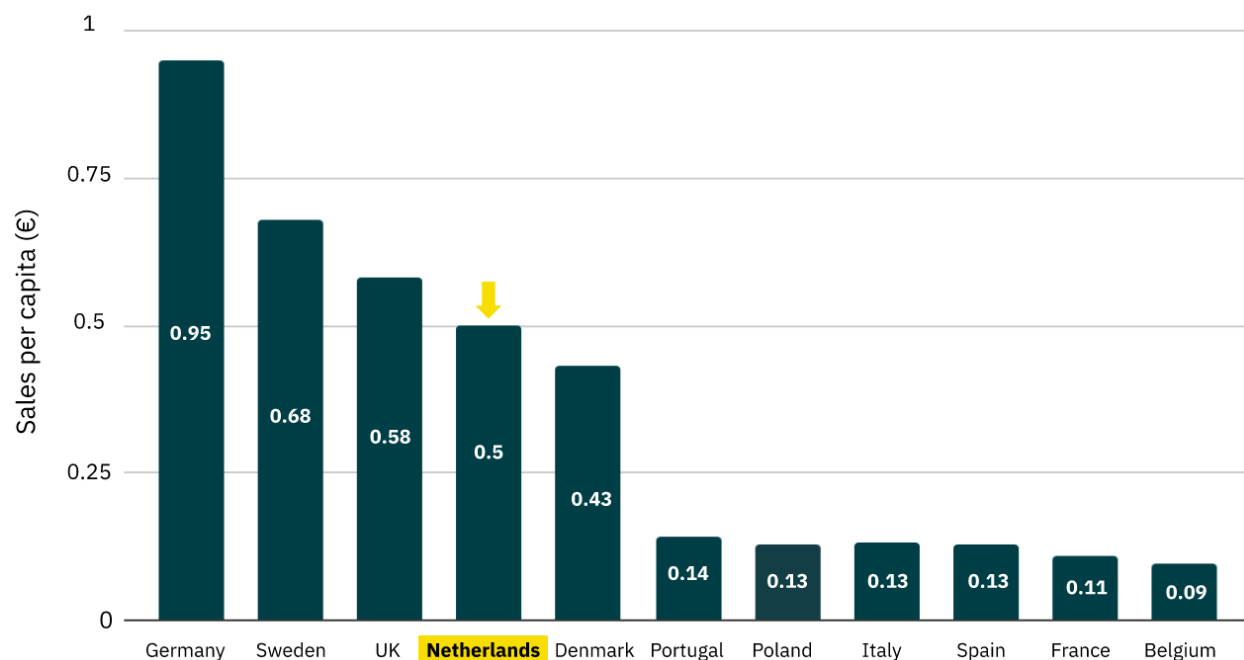
## Country comparison

The Netherlands has Europe's third highest plant-based cheese sales value and the fourth highest average plant-based cheese spend per capita.

### Europe-wide plant-based cheese sales per country (in € millions), 2022

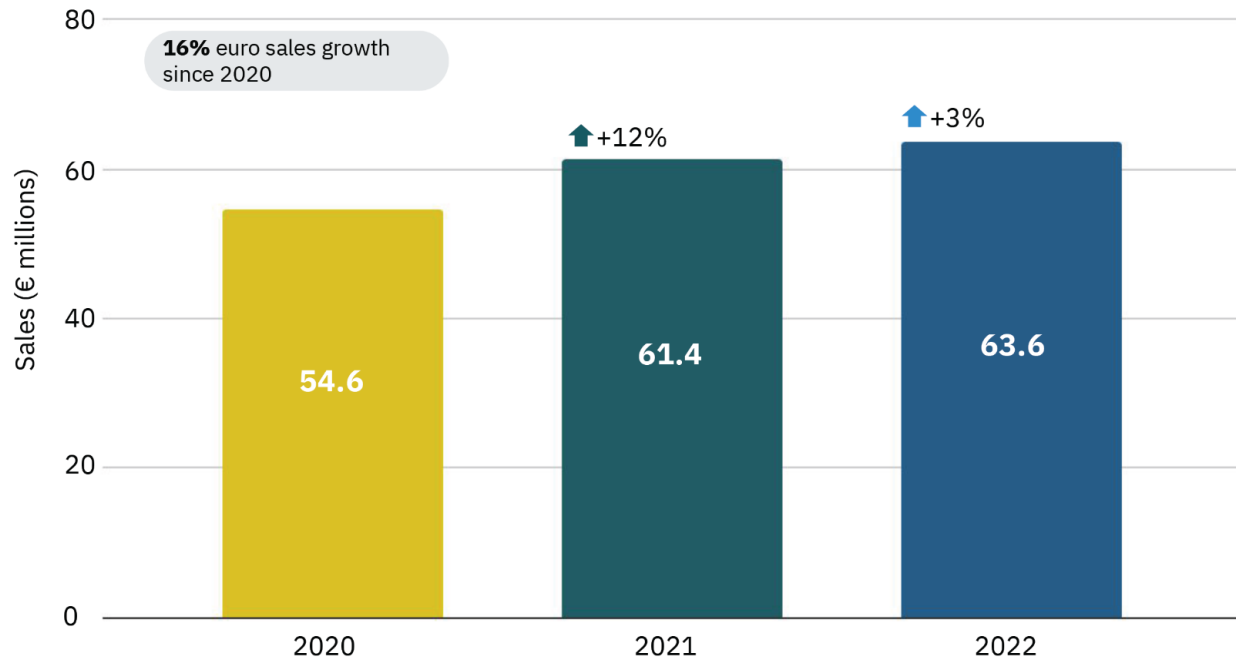


### Europe-wide average plant-based cheese spend per country per capita (in euros), 2022



# Plant-based yoghurt<sup>4</sup>

## Netherlands plant-based yoghurt sales (in € millions), 2020-2022



### Key insights:

- The value of plant-based yoghurt sales increased by 16% between 2020 and 2022, and unit sales increased by 13%.
- In comparison, conventional yoghurt unit sales decreased by 9% between 2020 and 2022.
- The average price per unit of plant-based and conventional yoghurt in 2022 increased by 7% and 16% respectively.
- In 2022, plant-based yoghurt had a 7% market share of the total yoghurt category.

### Segment insights:

- Soy yoghurt is the category leader with 62% of category sales value in 2022, followed by coconut yoghurt (19%) and oat yoghurt (4%).
- Oat yoghurt is experiencing the most significant growth, up 310% between 2020 and 2022, compared with 8% and 10% for soy and coconut respectively.

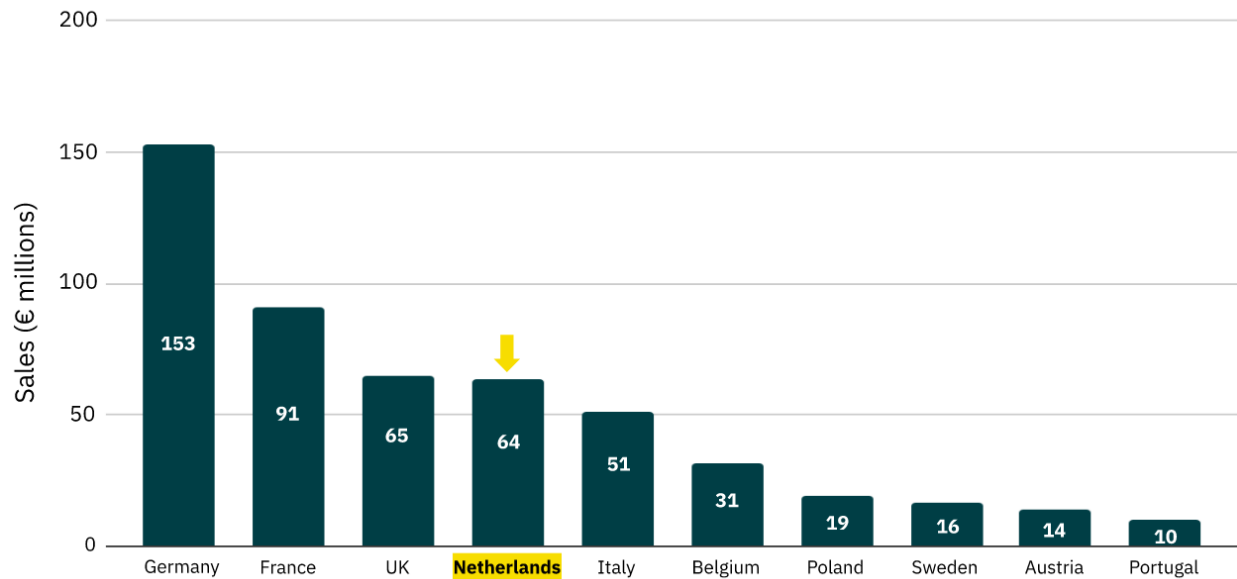
<sup>4</sup> The plant-based yoghurt category also includes kwark.



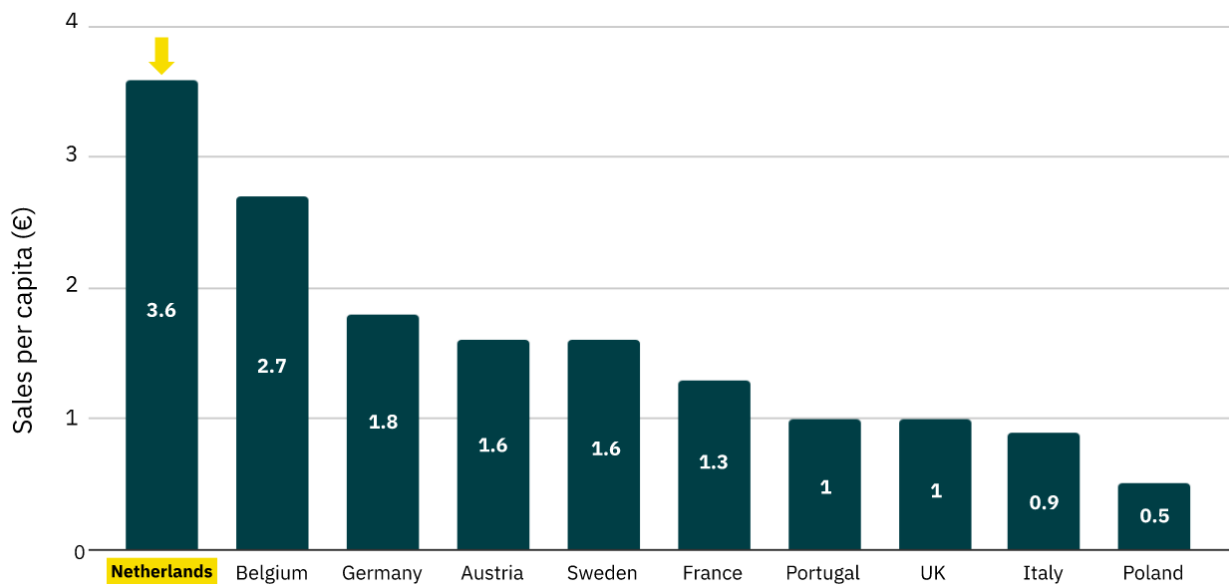
## Country comparison

The Netherlands has the fourth highest plant-based yoghurt sales value in Europe and the highest average plant-based yoghurt spend per capita.

### Europe-wide plant-based yoghurt sales per country (in € millions), 2022

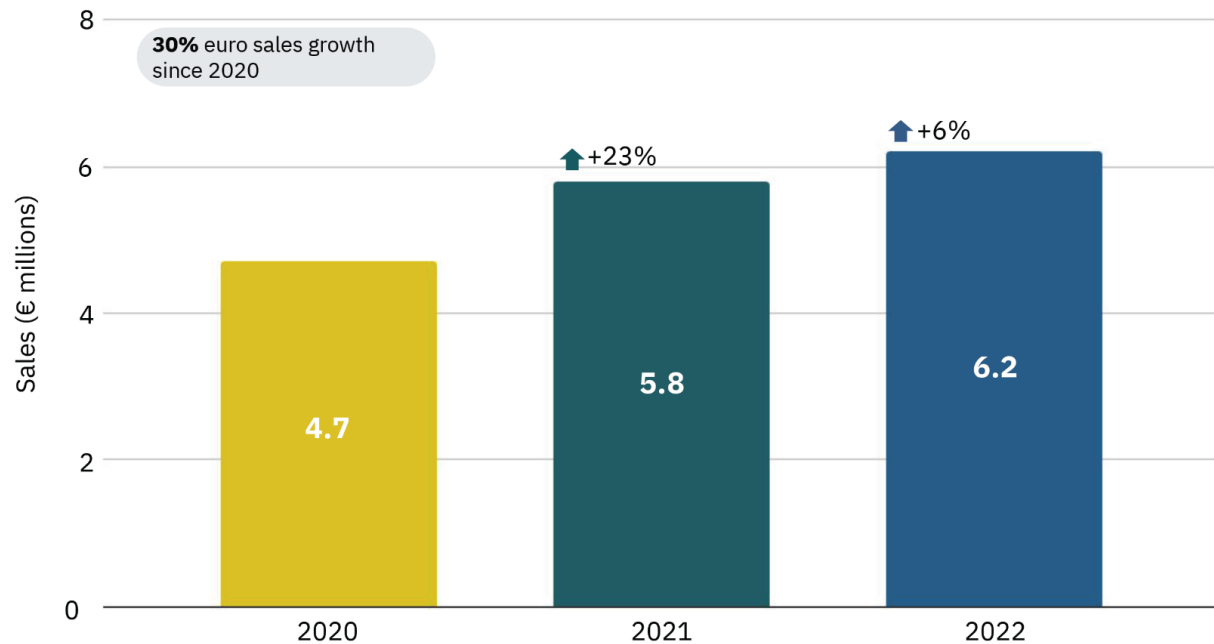


### Europe-wide average plant-based yoghurt spend per country per capita (in euros), 2022



# Plant-based cream

## Netherlands plant-based cream sales (in € millions), 2020-2022

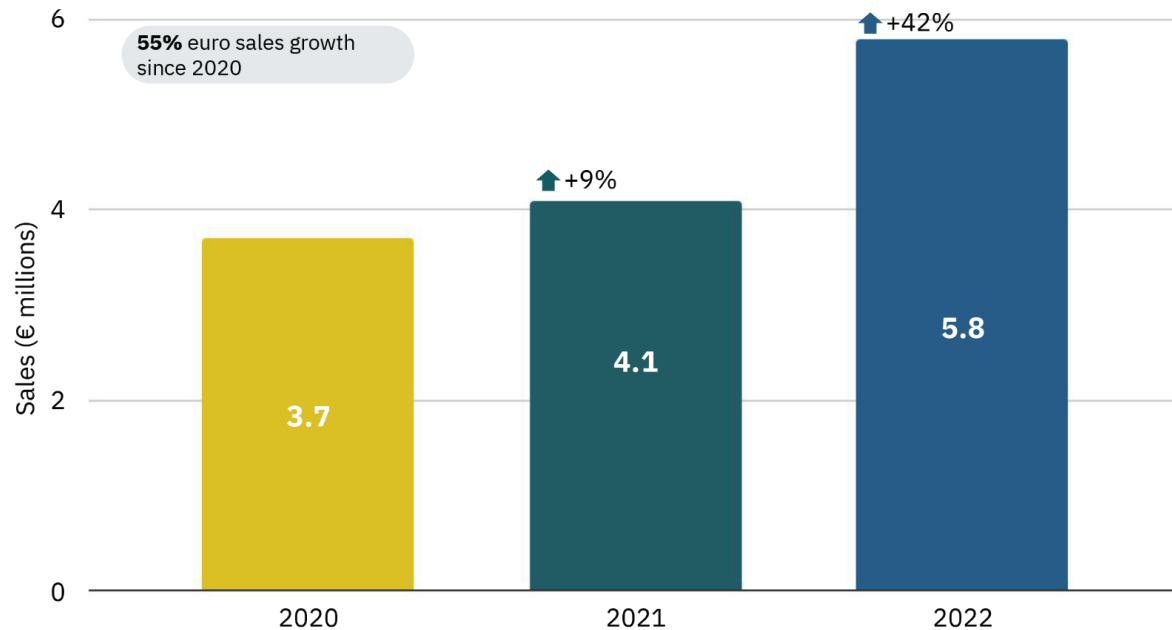


### Key insights:

- The value of plant-based cream sales increased by 30% between 2020 and 2022.
- Plant-based cream unit sales increased by 41% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 0.2%.

## Plant-based dessert<sup>5</sup>

### Netherlands plant-based dessert sales (in € millions), 2020-2022



#### Key insights:

- Plant-based dessert sales increased by 55% in terms of both value and unit sales between 2020 and 2022.
- The average price per plant-based dessert unit increased by 4% in 2022.

<sup>5</sup> The plant-based dessert category is primarily made up of pudding.

## Closing remarks

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“The plant-based food retail market in Europe has seen significant growth in recent years, driven by better plant-based products being brought to market. This is encouraging as the world works to address the many problems caused by industrial animal agriculture. However, to sustain this growth, companies must continue investing in product innovation to develop plant-based products that meet consumer expectations when it comes to the key drivers of taste, price, and convenience. The Good Food Institute’s [Advancing Solutions for Alternative Proteins database](#) is a great source to better understand key innovation priorities.”

**Carlotte Lucas,**  
*Senior Corporate Engagement Manager at the  
Good Food Institute Europe*



## About the data

To size the Dutch retail market for plant-based foods, GFI Europe commissioned retail sales data from market research firm NielsenIQ. Analysis in this report is based on data reported by NielsenIQ for the total plant-based, total dairy products, and total pre-packed meat categories for the 52-week, 104-week, and 156-week periods ending 31 December 2022, for the Netherlands market, according to GFI Europe product hierarchy. Therefore the data presented in this report may not align with standard NielsenIQ categories. Copyright © 2022, Nielsen Consumer, LLC.

## About the Good Food Institute Europe

[The Good Food Institute Europe](#) is an international NGO helping to build a more sustainable, secure and just food system by transforming meat production.

We work with scientists, businesses and policymakers to advance plant-based and cultivated meat – making them delicious, affordable and accessible across Europe.

By making meat from plants and cultivating it from cells, we can reduce the environmental impact of our food system and feed more people with fewer resources. GFI Europe is powered by philanthropy.

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