

2023 - 2025

Netherlands plant-based food retail market insights

Meat, milk and drinks, cheese, yoghurt, and cream.



Photo: Like

Executive summary

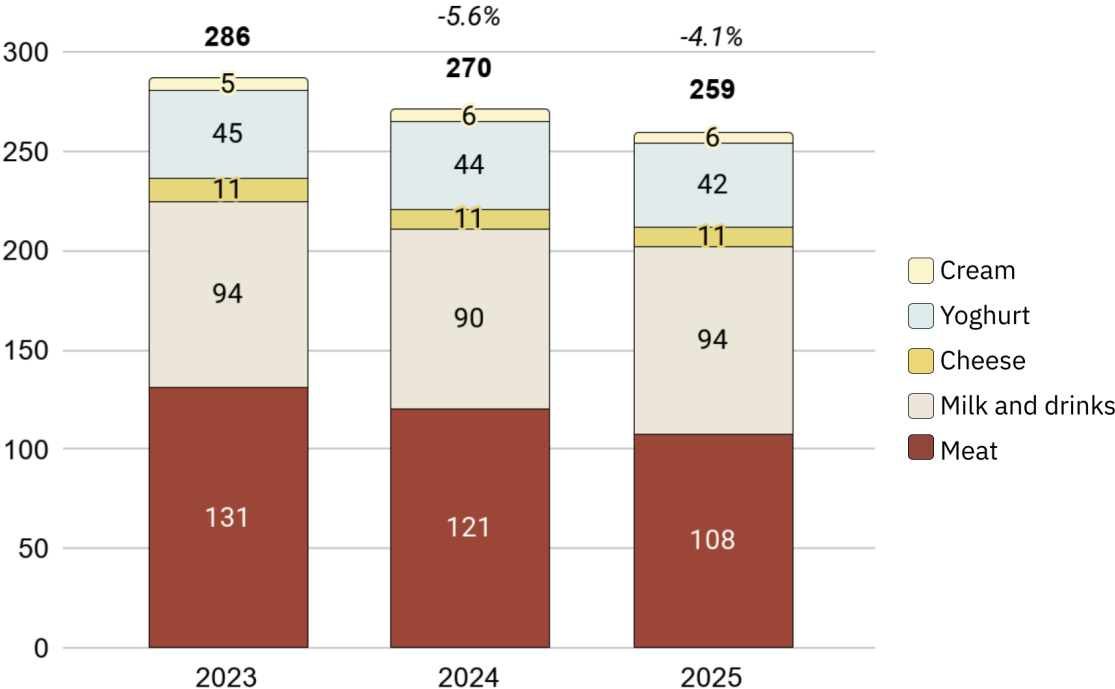
This report shows the trends in retail sales across five plant-based product categories (meat, milk and drinks, cheese, yoghurt and cream) in the Netherlands between 2023 and 2025, based on data from Circana.

The Dutch retail market across five categories of plant-based food was valued at €259 million in 2025.	Total annual sales value of plant-based foods across five categories in the Netherlands fell by 4.1% in 2025.	Total annual sales volume across five categories of plant-based foods in the Netherlands fell by 1.3% in 2025.
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The Netherlands has a mature plant-based market. Despite having the smallest plant-based market size of the six countries covered in this series of reports, it had the third-highest per capita spend on plant-based foods in 2025. It also has [strong institutional support](#) for plant-based diets and meat reduction.

In 2025, the Dutch market across five categories of plant-based food contracted, driven largely by declines in plant-based meat sales. From 2023 to 2025, total plant-based sales value fell 9.4%, unit sales fell 7.4%, and sales volume fell 4.4%.

Plant-based food sales value by category in Netherlands, 2023-2025
(€ millions)



The overall sales value of branded products fell by 13.6% between 2023 and 2025, while that of private-label products saw a 3.4% rise. Private-label products tend to be cheaper per kg, likely contributing to their growth.

Branded plant-based sales volume fell 8.7% in 2024 and fell 3.6% in 2025 .	Private-label plant-based sales volume rose 9.1% in 2024 and rose 2.7% in 2025 .
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However, the performance of different categories varied. Plant-based meat was the largest category by value in 2025, and also saw the greatest decline, with sales value down 10.5% and volume down 10.7% between 2024 and 2025.

At the same time, plant-based milk and drinks, the second-largest category by value, saw 4.0% growth in sales value between 2024 and 2025 and maintained steady sales volume. Some of the more expensive segments, such as barista-style milk, also saw growth, suggesting that better product performance can improve sales.

Plant-based milk and drinks in 2025:			
€93.5 million annual sales value	8.9% of overall plant- and animal-based milk sales volume	0.7% year-on-year growth in sales volume	41% more expensive per litre than animal-based milk

Plant-based cheese remained a niche category, accounting for less than 1% of unit sales, but sales volume grew 3.6% between 2024 and 2025.

Plant-based yoghurt sales volume peaked in 2024, with a 2.9% decline in 2025. Private-label products accounted for a growing proportion of the category.

Plant-based cream continued to grow, possibly driven by affordability. Sales volume rose by 5.1% between 2024 and 2025, and in 2025, plant-based cream was 6% cheaper per kg than dairy cream.

This year’s report features a new chapter on **tofu, tempeh and seitan**. These products are not classed as plant-based meat or counted towards the plant-based total because they are not marketed explicitly as analogues of specific animal-based products. This category grew rapidly: up by 27% in both sales value and sales volume between 2024 and 2025. This growth indicates shifting preferences among Dutch consumers.

However, in 2025, the sales volume of plant-based meat was 3.6 times higher than the combined sales volume of tofu, tempeh and seitan, demonstrating that products that aim to provide a meat-like taste, texture or format remain more popular.

Separate figures [show](#) that animal meat consumption in the Netherlands reached its lowest point in 20 years in 2024, indicating that Dutch consumers are choosing a wider variety of plant-based foods, rather than returning to conventional meat.

Overview of plant-based food sales by category in the Netherlands, 2023-2025

	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Meat	108.1	-10.5%	-17.4%	41.0	-12.1%	-19.0%	8.0	-10.7%	-16.7%
Milk and drinks	93.5	4.0%	-0.3%	49.0	2.3%	-1.9%	46.6	0.7%	-3.8%
Cheese	10.6	0.4%	-7.2%	4.9	2.2%	-0.7%	0.9	3.6%	1.1%
Yoghurt	41.7	-4.6%	-7.2%	21.7	-3.8%	3.8%	12.2	-2.9%	2.1%
Cream	5.5	0.1%	2.6%	4.1	4.0%	4.4%	0.9	5.1%	6.2%
Total	259.4	-4.1%	-9.4%	120.8	-4.1%	-7.4%	68.7	-1.3%	-4.4%

Bonus data on additional products that are not counted towards the plant-based total

Tofu, tempeh and seitan	13.7	27.3%	41.3%	6.9	26.0%	35.8%	2.2	27.1%	34.9%
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About the data

This report is based on sales data gathered by [Circana](#) from retailers in the Netherlands. The data has been analysed by the Good Food Institute Europe.

The data for the Netherlands covers retail sales in supermarkets and discounter stores, including Aldi and Lidl. It does not include food service sales, such as from restaurants or fast-food outlets.

Sales value figures include taxes.

Data for 2023, 2024 and 2025 covers 52-week periods beginning with the first calendar week of each year.

Note that due to ongoing refinement and backdating of the dataset by Circana, the figures reported here are not directly comparable with those reported in the previous edition of this report.

Key terms

Plant-based: foods that are made from plants. Where data permits, we have focused specifically on plant-based products that aim to mimic the taste and texture of animal products. In some categories, non-analogue products such as those based on beans or lentils are also included because the data does not permit further subcategorisation.

Animal-based: food derived from animals, such as meat from pigs or milk from cows.

Plant-based meat: foods made from plants or fungi that are designed to be similar to animal-based meat in taste and texture. The Circana data for plant-based meat may include some products that are not direct substitutes for meat, such as bean burgers, because it was not possible to fully separate out these products. Plant-based meat products may contain small amounts of egg or dairy, but plant-based ingredients like soy or pea are the main protein sources. Plant-based meat does not include tofu, tempeh or seitan – these categories have been reported separately.

Plant-based milk and drinks: drinks made from plants such as soy or oat that are intended to mimic the taste and performance of animal-based dairy milk. The plant-based milk and drinks category includes plain and flavoured plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include fruit juices or other drinks not designed to replicate dairy.

Market share: the proportion of all sales in a wider product category (comprising both plant-based and animal-based versions) that is plant-based. This is calculated by dividing plant-based sales by the sum of plant-based and animal-based sales. Market share can be calculated on the basis of sales volume or sales value. Note that in this report, market share is calculated based only on retail sales of pre-packaged products.

Private label: products that are sold under the label of a retailer, as opposed to branded products. Also known as supermarket own-brand products.

Sales value: the total value of sales measured in euros (€).

Sales volume: the total quantity of products sold measured in kilograms (kg) or litres (l), depending on the product category.

Unit sales: the total number of units of a product sold. A unit can refer to a pack, carton or tub, for instance.

Overall plant-based food market

Total Dutch plant-based market

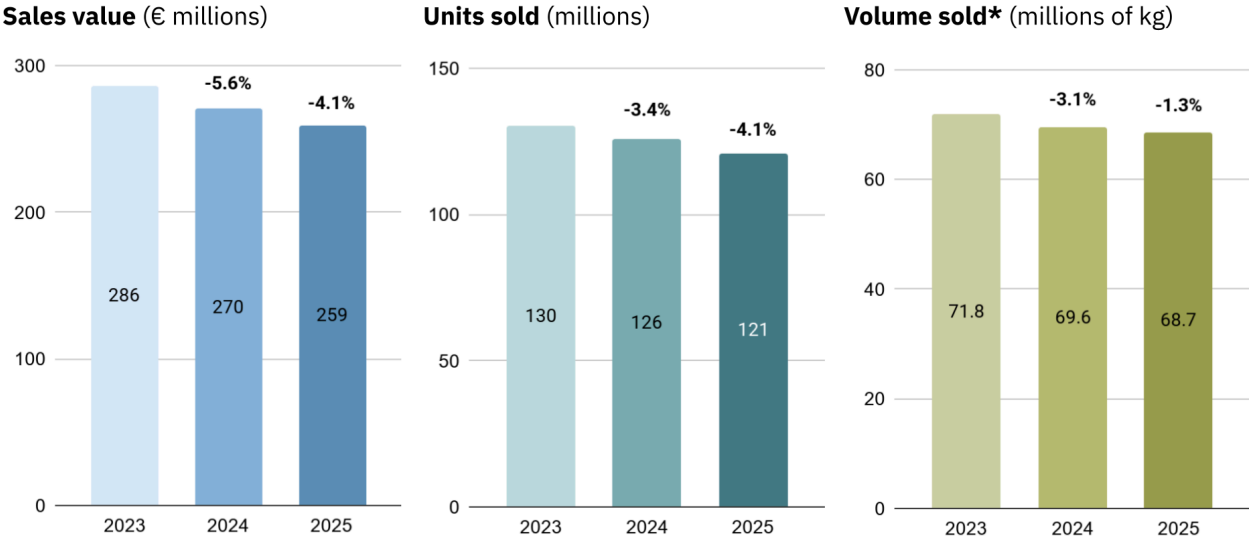
Retail sales of plant-based foods in the Netherlands continued to fall in 2025.

In 2025, the combined annual sales value across five plant-based categories (meat, milk and drinks, cheese, yoghurt and cream) fell by 4.1% to €259 million, 9.4% lower than in 2023. Unit sales also fell 4.1% in 2025, down to 121 million, 7.4% lower than in 2023. Sales volume fell more slowly: at 68.7 million kg in 2025, it was 1.3% lower than in 2024 and 4.4% lower than in 2023.

The lower fall in sales volume in 2025, compared with that of sales value, is due to steady sales volume in the highest-volume category, plant-based milk and drinks.

The fall in sales should be seen in the context of the Netherlands being one of Europe’s more mature plant-based markets. Of the six countries in this series of reports, the Netherlands had the third highest spend per capita on plant-based foods.

Plant-based food sales across five categories in Netherlands, 2023-2025



*Sales volume was reported by Circana in litres for milk and drinks, in mixed kg/litres for yoghurt and cream, and in kg for meat and cheese. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.

As explored further below, the downward trend is not uniform, but rather indicates challenges in specific categories. Most of the overall decline in sales in 2025 came from the plant-based meat category, where sales volume fell by 966,000kg. In contrast, the sales volume of plant-based milk and drinks rose by 322,000kg in 2025.

The fall in plant-based meat sales volume does not appear to indicate a return to animal-based meat. Retail sales of tofu, tempeh and seitan rose by 473,000kg in 2025, and separate figures released in late 2025 [showed](#) that animal meat consumption in the Netherlands reached its lowest point in 20 years in 2024.

The [Protein Monitor 2025](#) found that the overall ratio of plant-based to animal-based protein in Dutch diets remained constant at 39:61 in both 2024 and 2025. Plant-based foods are defined broadly in that report, including foods such as legumes, nuts and grains, as well as plant-based meat and tofu. Furthermore, self-reported intent to purchase legumes, plant-based meat and dairy, and tofu, tempeh or seitan, increased between 2024 and 2025 – suggesting that consumer demand exists, but factors including taste, price and accessibility may be holding back sales.

Plant-based food also continues to have strong institutional support in the Netherlands. According to [ProVeg](#), 89% of supermarkets, 60% of wholesalers, 68% of restaurant chains, 80% of contract caterers and 100% of universities are taking steps to sell more plant-based and less animal-based food. New dietary [guidelines](#) from the Health Council of the Netherlands, published in late 2025, recommend reducing red and processed meat consumption and eating more legumes and unsalted nuts. In May 2026, meat advertisements were [banned](#) in the city of Amsterdam.

Categories

In common with several other European countries, the plant-based category most firmly established in the Dutch market is milk and drinks, which accounted for 12.1% of the sales value and 8.9% of the sales volume of overall milk and dairy drink retail sales in 2025.

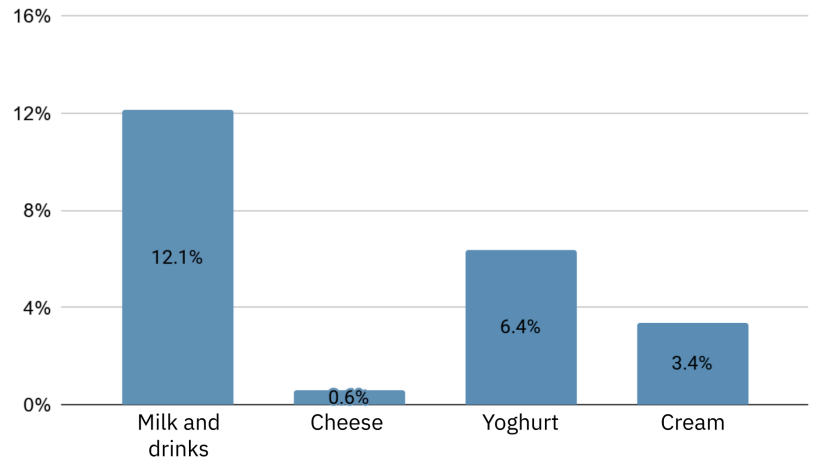
Plant-based milk and drinks also had the highest rate of sales value growth in 2025, at 4.0%.

Plant-based yoghurt and cream had lower market shares, at 5.4% and 3.6% of sales volume, respectively, in 2025.

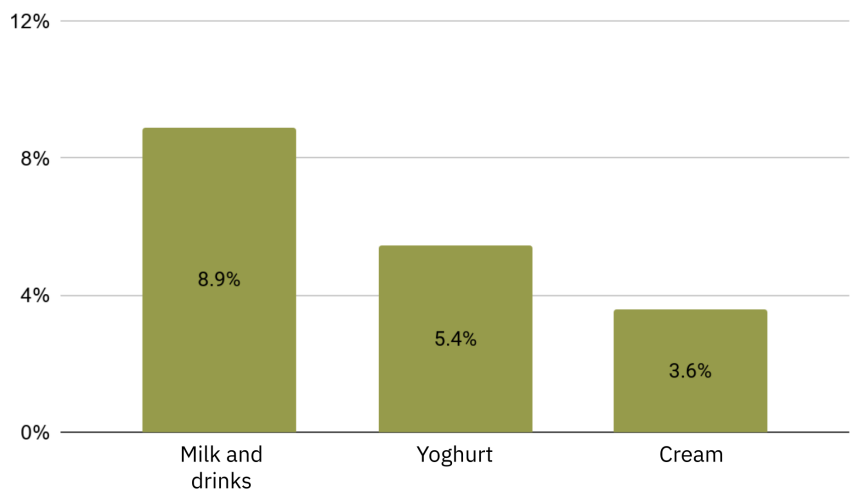
Plant-based cheese remained a niche category, at less than 1% of overall cheese sales value.

It was not possible to calculate a market share for plant-based meat. However, it was the largest plant-based category by sales value, at €108 million in 2025.

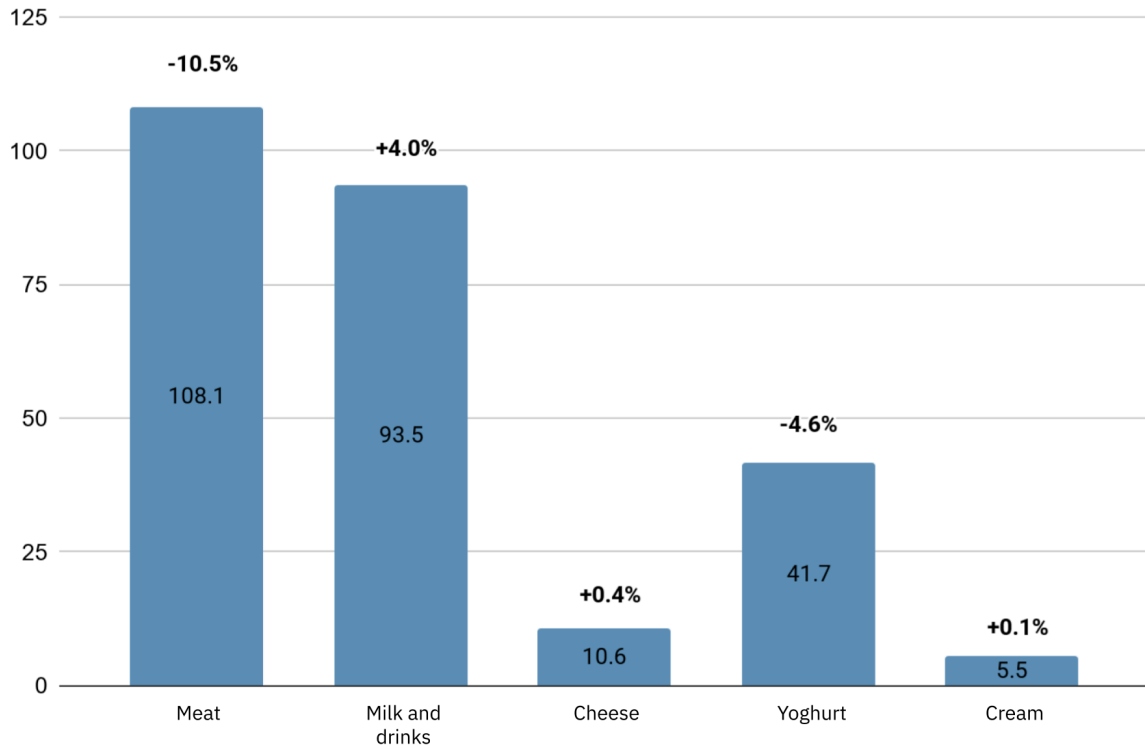
Plant-based food: share of the Netherlands' total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales value)



Plant-based food: share of the Netherlands' total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales volume)



Plant-based food sales value and growth rates* by category in the Netherlands, 2025 (€ millions)



* The percentages above each column denote the change in sales value of that category between 2024 and 2025.

Branded versus private label

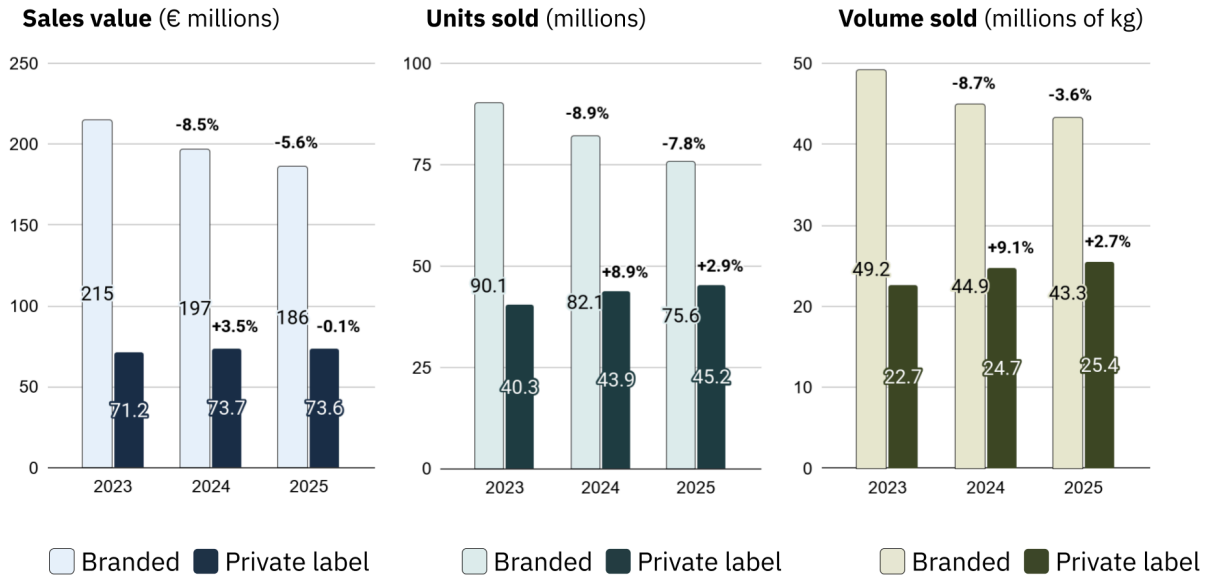
Sales of branded plant-based products fell while those of private-label (supermarket own-brand) products rose between 2023 and 2025. This trend is likely to be driven by affordability, as private-label options tend to be cheaper than branded products – significantly so in some categories. Private-label plant-based milk and drinks were 44% cheaper than branded versions in 2025.

Although [inflation](#) in the Dutch food sector has not returned to the historic high of 17.9% in February 2023, it did rise throughout 2024 and the first half of 2025. Affordability is therefore still likely to be an important consideration for Dutch consumers. However, as discussed in the separate chapters below, there was growth in some more expensive segments, such as barista milk, indicating that good product performance is also important.

Plant-based sales and growth rates across five product categories in the Netherlands, branded versus private label, 2023-2025

	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Branded	185.8	-5.6%	-13.6%	75.6	-7.8%	-16.1%	43.3	-3.6%	-12.0%
Private label	73.6	-0.1%	3.4%	45.2	2.9%	12.1%	25.4	2.7%	12.1%

Branded vs private label plant-based food sales across five categories in the Netherlands, 2023-2025



*Sales volume was reported by Circana in litres for milk and drinks, in mixed kg/litres for yoghurt and cream, and in kg for meat and cheese. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.

Comparison to animal-based foods

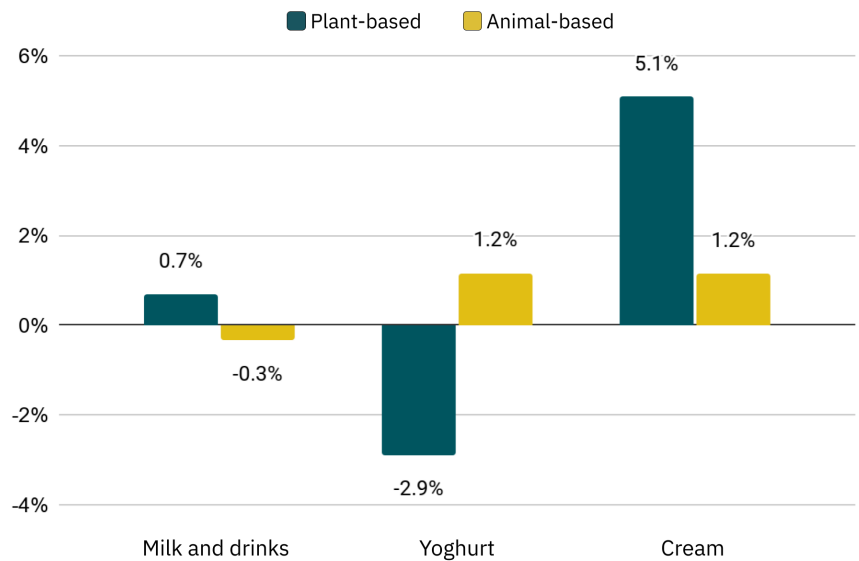
In the animal-based categories, the sales volume of yoghurt and cream both increased (although only slightly) in 2025, while that of animal-based milk and drinks remained roughly level.

Plant-based milk and drinks and cream therefore saw stronger percentage sales volume growth – though their sales volumes remain lower than their animal equivalent.

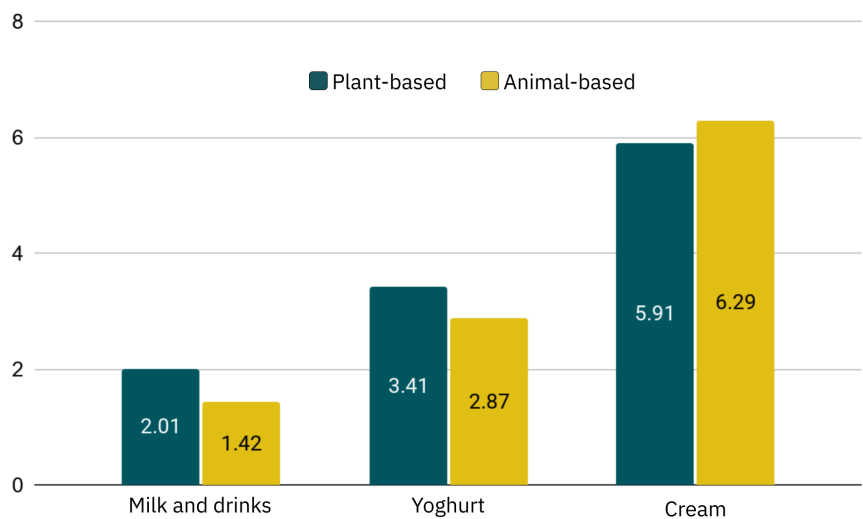
The increase in the sales volume of plant-based cream may be linked to its price falling below that of animal-based cream.

Complete animal-based sales volume data was not available for meat or cheese.

Change in the sales volume of pre-packaged plant- and animal-based foods in the Netherlands, 2024-2025 (%)



Average price per kg or litre of plant- and animal-based foods in the Netherlands, 2025 (€ per kg or l)



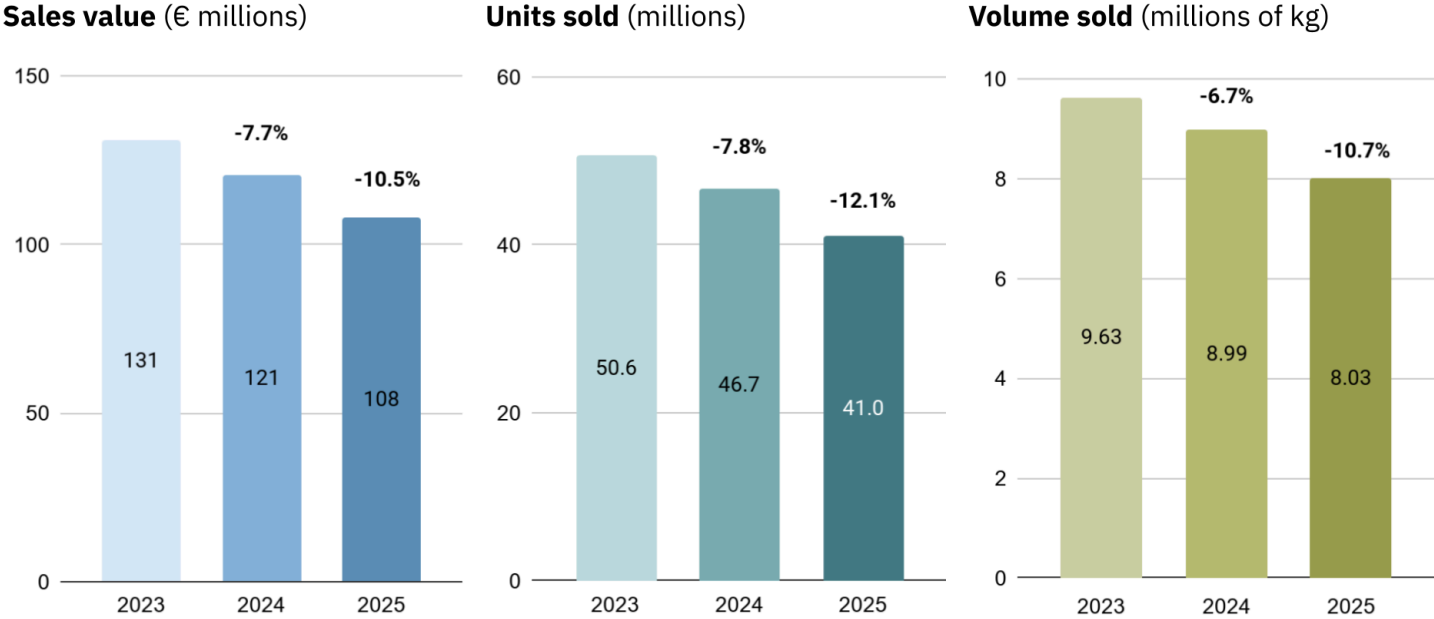
Plant-based meat

Total market

The Netherlands is one of Europe’s more mature markets for plant-based meat, with adoption having peaked around 2022, when the Netherlands had the [highest per capita retail sales](#) of 13 European countries. In 2025, sales of plant-based meat continued their downward trend, although the Netherlands nevertheless had the second-highest per capita retail sales of plant-based meat of the six countries covered in this [series of reports](#).

In 2025, the annual sales value of plant-based meat¹ was €108 million – down 10.5% from 2024, and down 17.4% from 2023. Unit sales fell 12.1% in 2025 to 41.0 million, down by 19.0% compared with 2023. Sales volume was 8.03 million kg in 2025, down 10.7% from 2024 and down 16.7% from 2023.

Plant-based meat sales in the Netherlands, 2023-2025



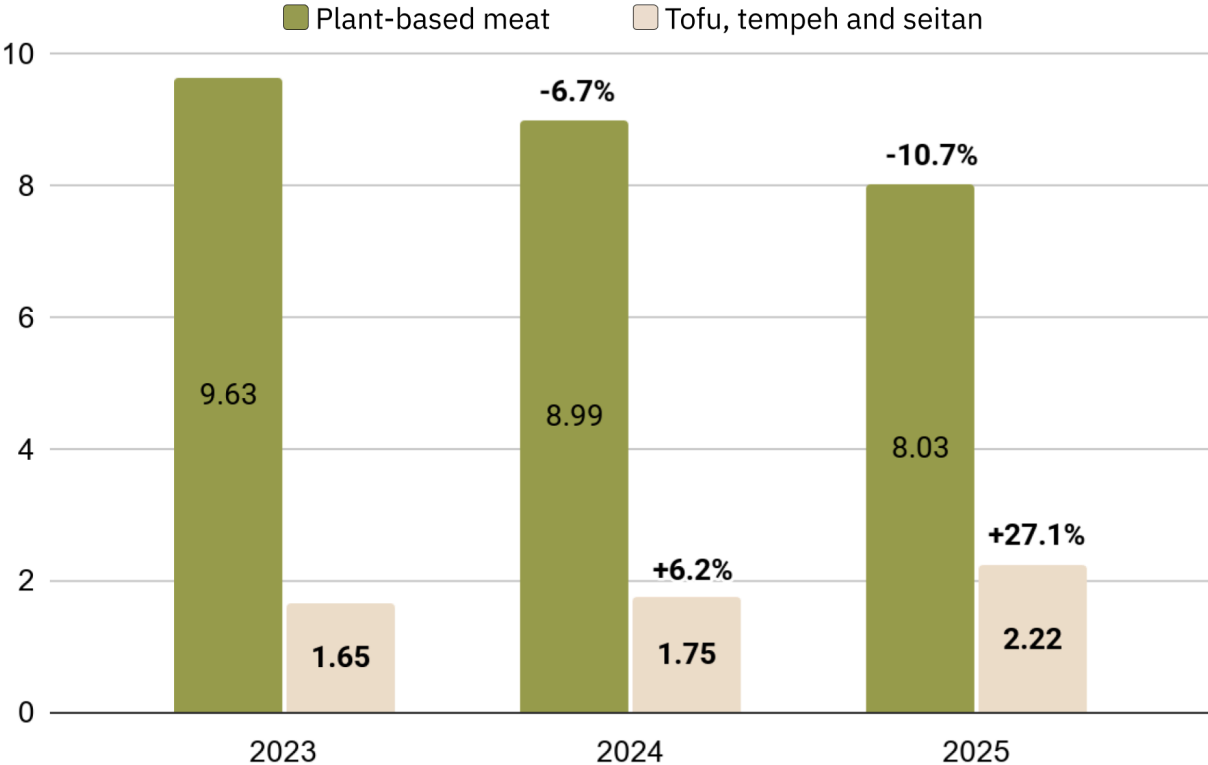
¹ Note that the 2023 and 2024 totals are not comparable to those in the previous edition of this report. This is because a more detailed dataset was available this year, enabling some non-analogue products such as falafel to be removed from the plant-based meat total. However, the total may still include some products that use meaty formats but that do not directly mimic the taste of meat, such as bean burgers.

The rate of decrease in sales value, unit sales and sales volume accelerated between 2024 and 2025, suggesting a challenging environment for the Dutch plant-based meat sector. However, it should also be seen in the context of falling consumption of animal-based meat in the Netherlands, which in 2024 was at its [lowest level](#) in 20 years.

The plant-based meat category does not include tofu, tempeh or seitan, which are reported in more detail in the next chapter, “Spotlight on tofu, tempeh and seitan”. By comparison, the combined sales volume of tofu, tempeh and seitan rose by 34.9% between 2023 and 2025, with the rate of growth accelerating between 2024 and 2025.

Nevertheless, in 2025, the sales volume of plant-based meat was 3.6 times that of tofu, tempeh and seitan combined. This shows that products that replicate the taste, texture or format of conventional meat products remain more popular with Dutch consumers.

Plant-based meat compared to tofu, tempeh and seitan in the Netherlands, 2023-2025 (sales volume, million kg)



Branded versus private label

Private-label products saw their share of plant-based meat sales volume increase steadily, from 32.3% in 2023 to 40.5% in 2025. This reflected a 4.5% increase in private-label sales volume over this time period, while branded sales volume fell 26.8%.

This trend is likely to be driven by the increased affordability and availability of private-label products.

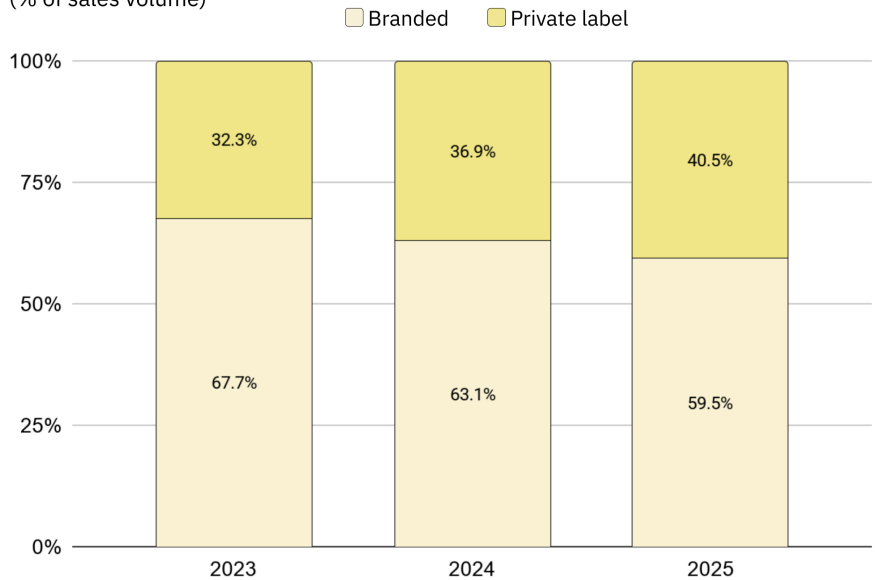
While the price per kg of branded plant-based meat rose over time, that of private-label products fell. By 2025, private-label products were, on average, 38% cheaper than branded products.

According to [research](#) by the Green Protein Alliance and ProVeg Netherlands, several supermarkets have expanded their private-label plant-based ranges over the past few years.

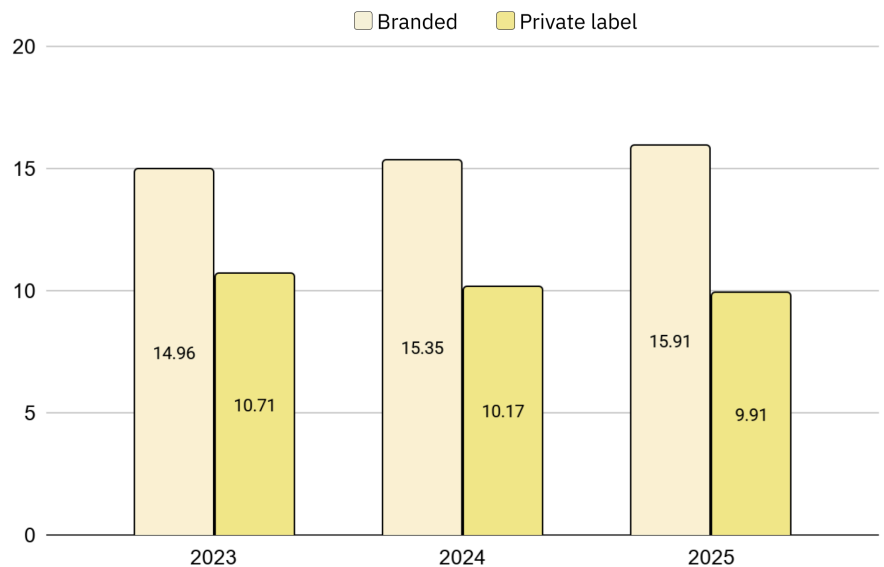
Some retailers went further: in 2023, supermarket [Jumbo](#)

announced a policy of charging no more for their private-label plant-based meat than for the animal-based meat equivalent. However, in March 2026, Jumbo [resumed](#) offering discounts on fresh animal-based meat.

The Netherlands plant-based meat sales by branded or private label, 2023-2025
(% of sales volume)



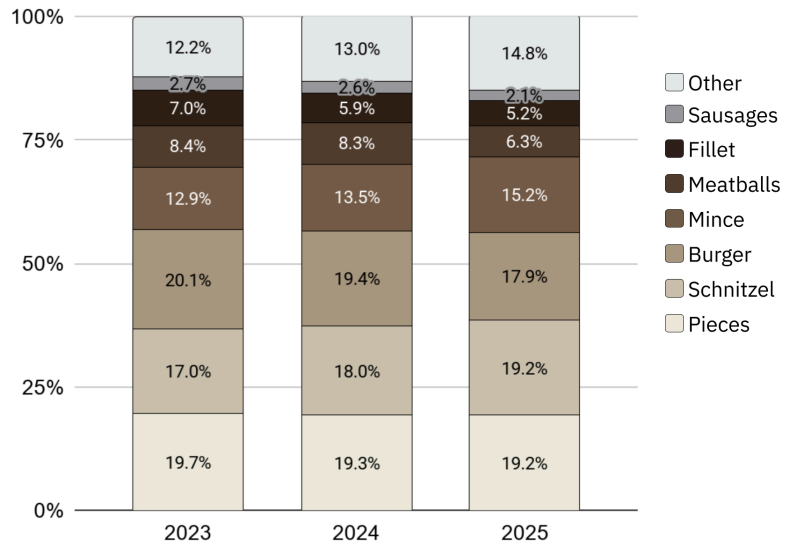
Average price per kg of plant-based meat in the Netherlands, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

A wide range of plant-based meat product formats was available, with pieces, schnitzel and burgers leading in terms of sales volume. Between 2023 and 2025, there was some growth in the mince category as well as in “others” (which includes products such as nuggets and steaks). The market share of meatballs and fillets fell over time.

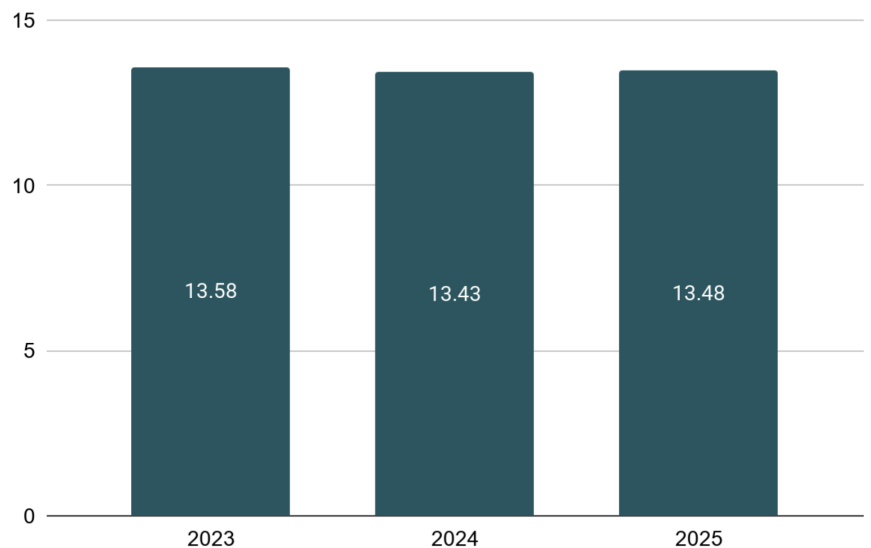
Netherlands plant-based meat sales by type, 2023-2025
(% of sales volume)



Price trends

The average price of plant-based meat remained roughly steady between 2023 and 2025, though as noted above, private-label prices fell and branded prices grew over this period.

Average price per kg for plant-based meat in the Netherlands, 2023-2025
(€/kg)



Spotlight on tofu, tempeh and seitan

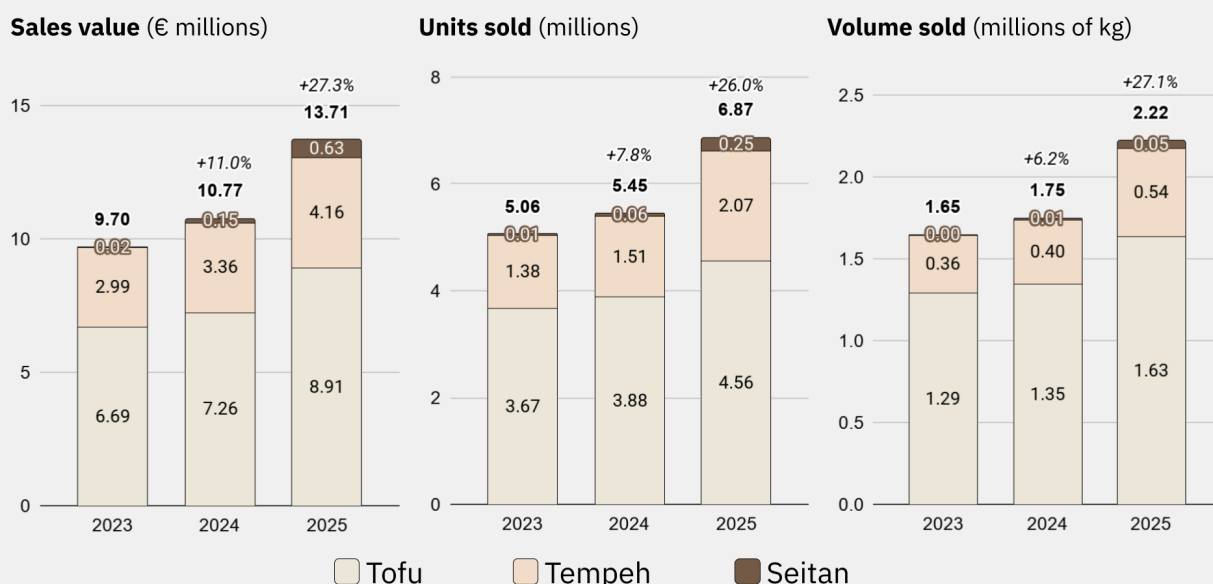
Total market

Tofu, tempeh and seitan² are traditional foods with a long history in Asian cooking. They are not classed as plant-based meat in this report because, in the Dutch market, they are not typically positioned as direct substitutes that aim to replicate the taste or texture of meat, in contrast to the newer wave of innovative plant-based meats that have grown in popularity over the past decade or so. However, they provide an interesting case study to compare with sales trends of plant-based meats that do aim to replicate the taste or format of meat.

The combined annual sales value of tofu, tempeh and seitan grew by 27.3% in 2025, reaching €13.7 million – 41.3% higher than in 2023. Unit sales reached 6.87 million in 2025, up by 26.0% from 2024 and up by 35.8% from 2023. Sales volume rose by 27.1% in 2025 to 2.22 million kg, up by 34.9% since 2023.

The rates of growth accelerated markedly between 2024 and 2025.

Tofu, tempeh and seitan sales in the Netherlands, 2023-2025



² Tofu is a product originating in China over 2,000 years ago, made from soy milk curds. Tempeh is a traditional Indonesian product made from fermented soybeans. Seitan is made from wheat gluten and historically used in various Asian cuisines.

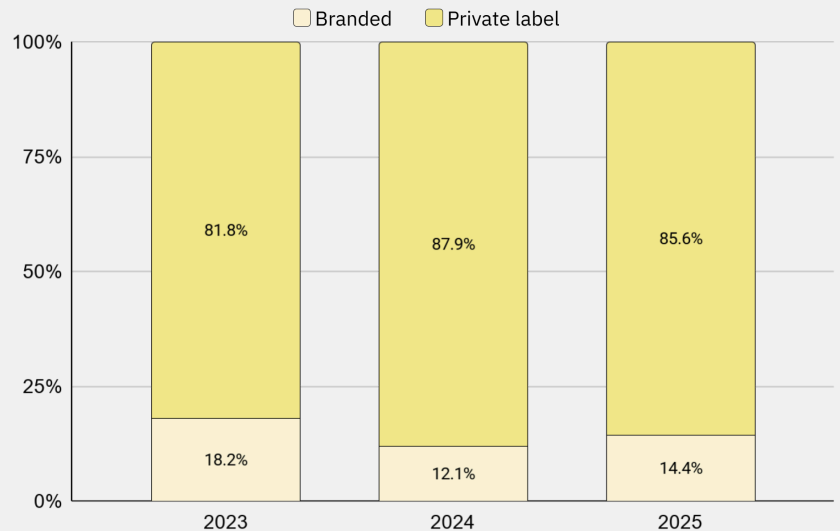
Branded versus private label

A large chunk of the market was made up of private-label products, at 85.6% of sales volume in 2025.

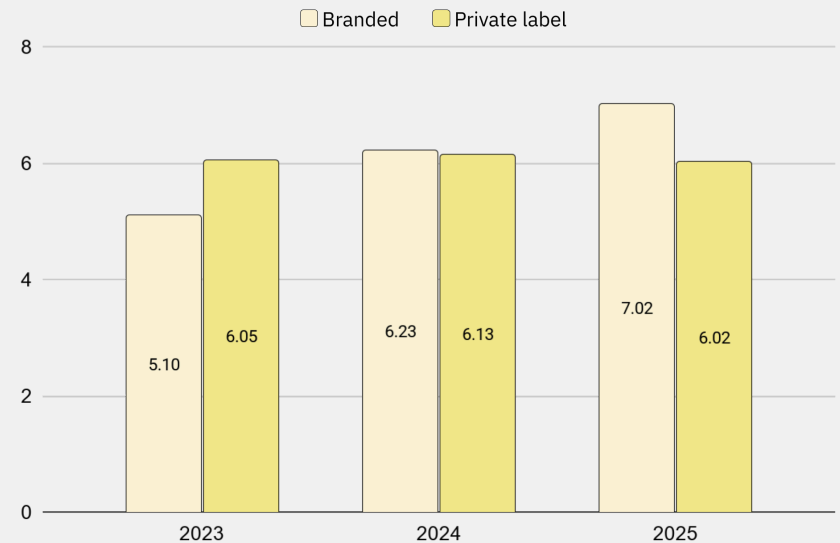
For tofu specifically, the private-label products represented 82% of sales volume in 2025; for tempeh, the figure was 95%; and for seitan, it was 99%.

While private-label prices per kg remained steady between 2023 and 2025, branded prices increased. For example, branded tofu cost €4.97/kg in 2023 and €7.03/kg in 2025.

The Netherlands tofu, tempeh and seitan sales by branded or private label, 2023-2025 (% of sales volume)



Average price per kg of tofu, tempeh and seitan in the Netherlands, by branded or private label, 2023-2025 (€/kg)



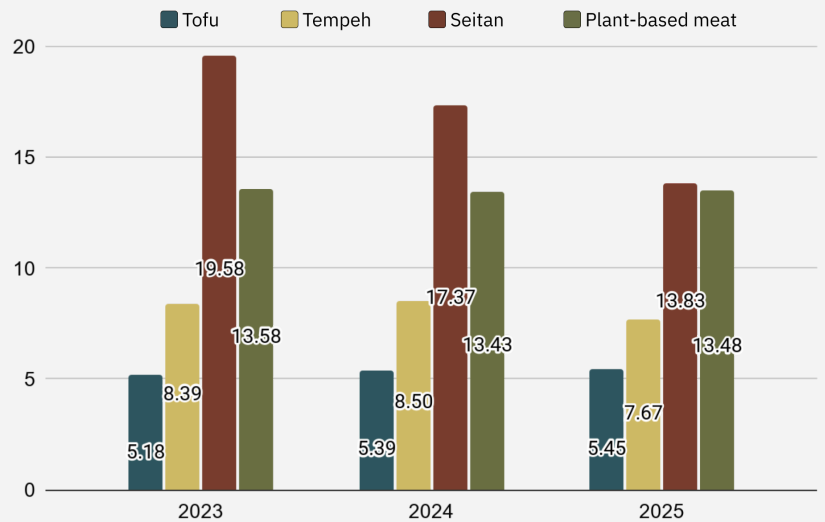
Price trends

Despite price fluctuations, tofu was consistently significantly cheaper than tempeh, seitan and plant-based meat. Private-label tofu was particularly affordable, at just €5.11/kg in 2025.

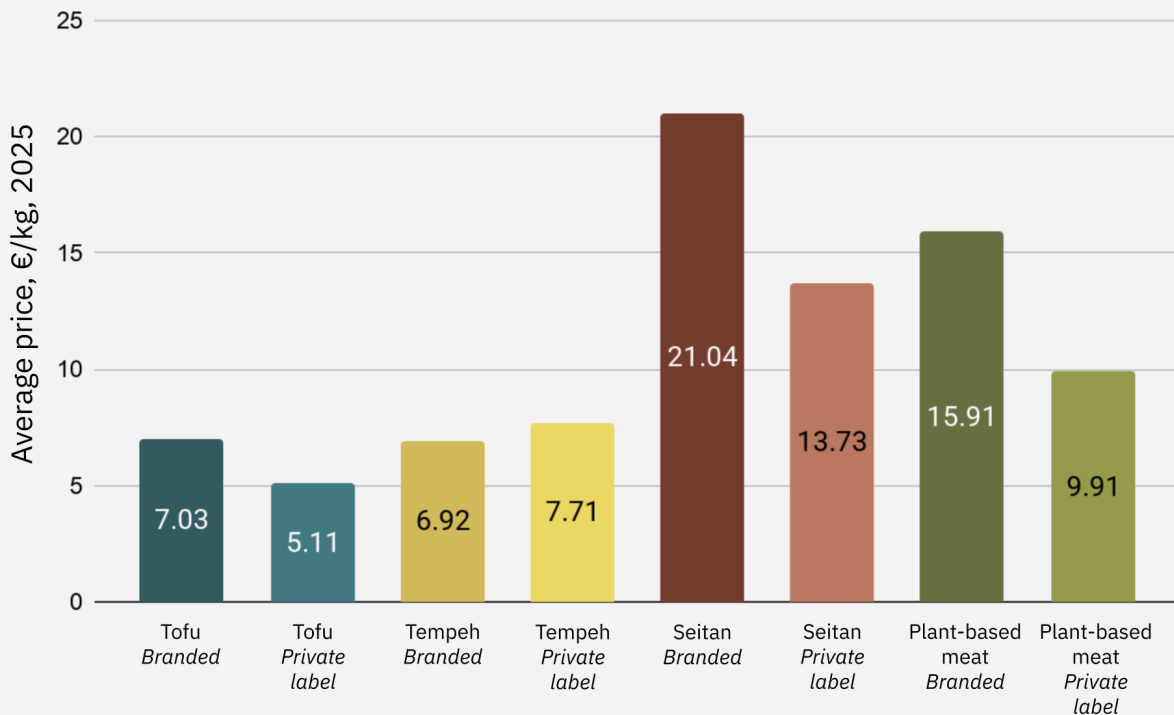
Tempeh was also cheaper than plant-based meat.

The price of seitan fell steeply between 2023 and 2025, due to the increased availability of cheaper private-label products.

Average price per kg for tofu, tempeh, seitan and plant-based meat in the Netherlands, 2023-2025 (€/kg)



Average price per kg for tofu, tempeh seitan and plant-based meat segments in the Netherlands, by branded or private label, 2025 (€/kg)



Plant-based milk and drinks

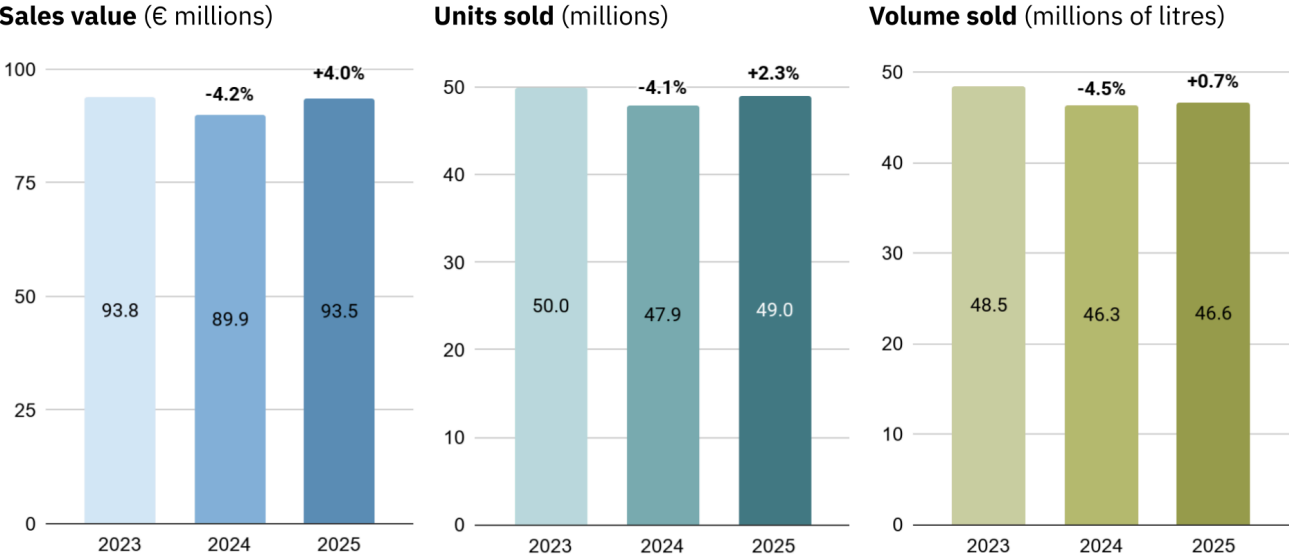
Total market

Following a dip in 2024, the Dutch market for plant-based milk and drinks steadied in 2025.

Annual sales value fell by 4.2% in 2024 before rebounding by 4.0% in 2025, reaching €93.5 million. Unit sales fell by 4.1% in 2024, and rose by 2.3% in 2025 to 49.0 million. Sales volume fell by 4.5% in 2024, then remained steady in 2025, rising 0.7% to 46.6 million litres.

The larger growth in sales value than in sales volume during 2025 indicates rising average prices.

Plant-based milk and drinks sales in the Netherlands, 2023-2025

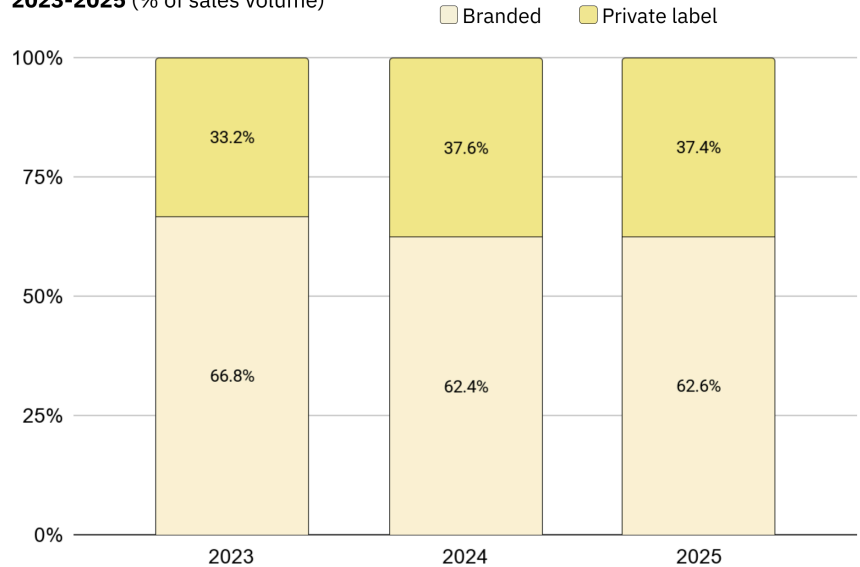


Branded versus private label

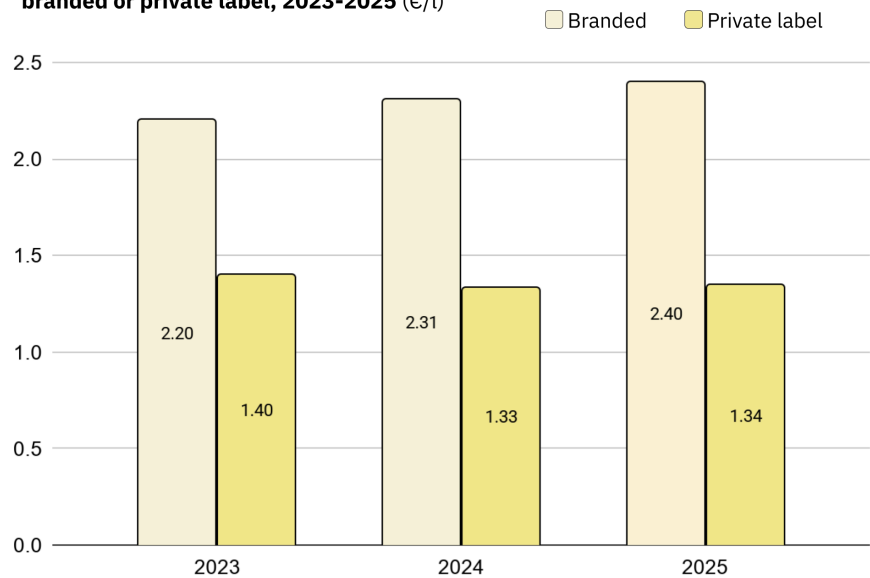
Private-label products saw their share of plant-based milk and drinks sales volume rise from 33.2% in 2023 to 37.6% in 2024, remaining roughly level in 2025.

The price of private-label products fell between 2023 and 2025, while branded products grew more expensive. In 2025, private-label products were 44% cheaper per litre than branded products.

The Netherlands plant-based milk and drinks sales by branded or private label, 2023-2025 (% of sales volume)



Average price per litre of plant-based milk and drinks in the Netherlands, by branded or private label, 2023-2025 (€/l)



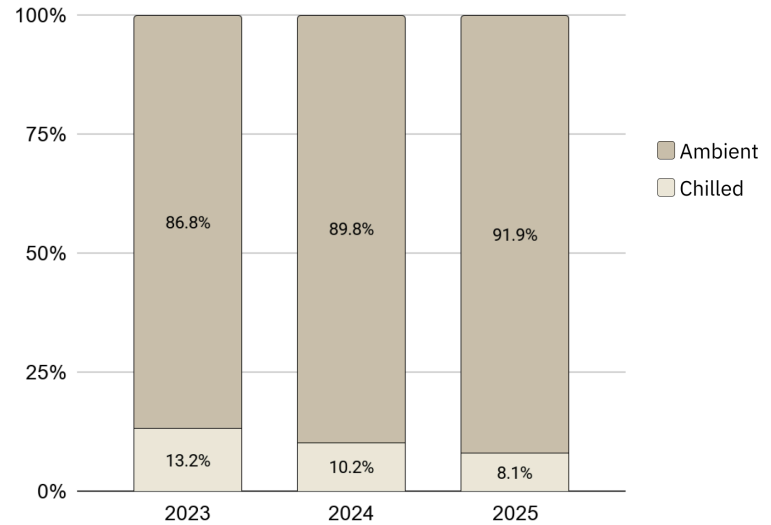
Product format breakdown

The majority of plant-based milk and drinks were in an ambient format. The proportion of chilled products fell from 13.2% of sales volume in 2023 to 8.1% in 2025. This trend may be driven by price, as chilled products cost €2.56/litre in 2025, compared with €1.96/litre for ambient.

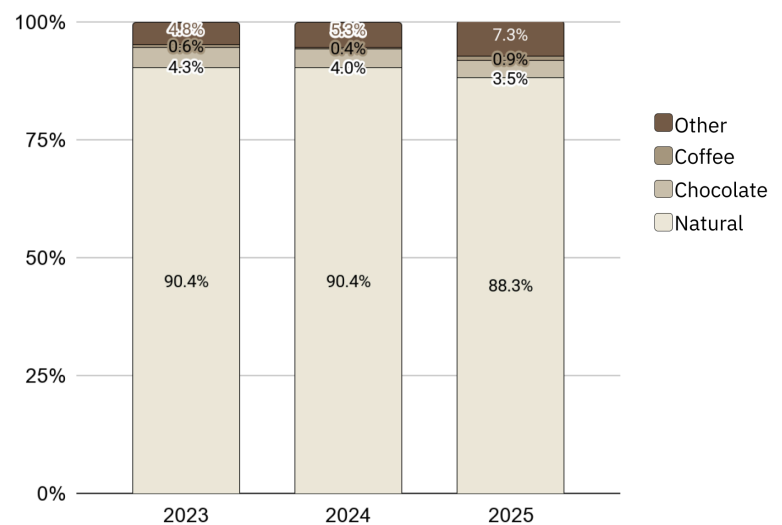
The majority of products were natural (plain) flavoured, at 88.3% of sales volume in 2025. However, the proportion of drinks with coffee or other flavours rose between 2023 and 2025, despite their higher price points. For example, in 2025, natural-flavoured products cost €1.91/litre on average, coffee drinks cost €6.64/litre and drinks with other flavours cost €2.44/litre.

Barista-style drinks, which are designed to foam and perform well in hot drinks, rose to 30.7% of sales volume in 2025 despite costing on average 24% more than non-barista style products.

Netherlands plant-based milk and drinks sales by temperature, 2023-2025 (% of sales volume)



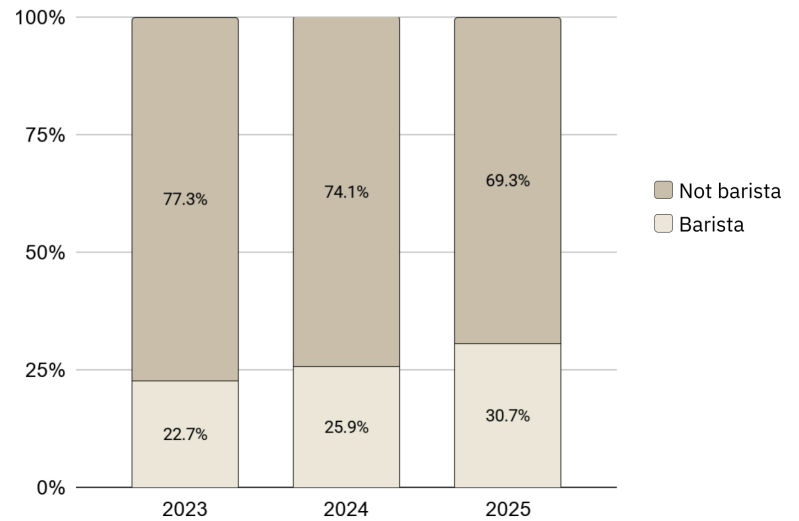
Netherlands plant-based milk and drinks sales by flavour, 2023-2025 (% of sales volume)



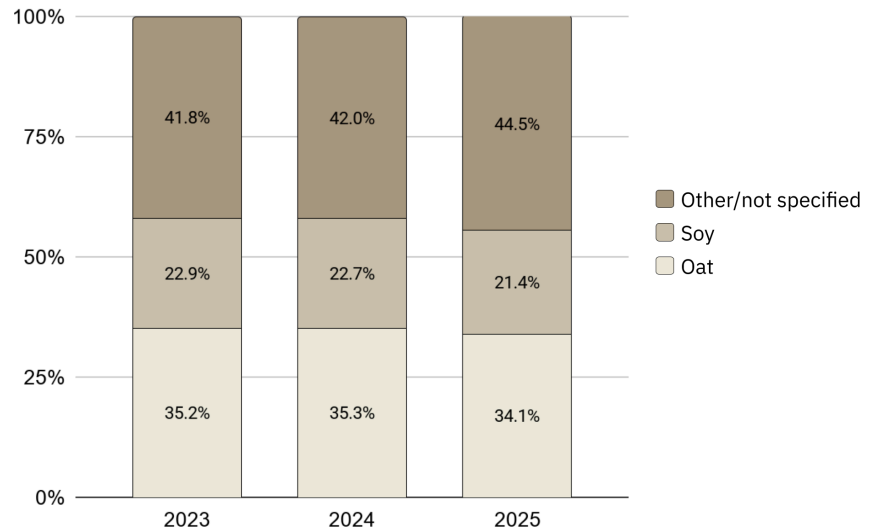
Products made from soy and oat together accounted for over half of sales volume. The proportion of both oat- and soy-based products fell slightly between 2023 and 2025.

Soy-based products cost an average of €1.34/litre in 2025, a decrease from 2023. Oat-based products were more expensive, at €2.21/litre in 2025 – an increase from 2023. The higher proportion of oat-based sales, despite their higher price, suggests that they may be preferred by consumers in terms of taste or performance.

Netherlands plant-based milk and drinks sales by barista type, 2023-2025 (% of sales volume)



Netherlands plant-based milk and drinks sales by base ingredient, 2023-2025 (% of sales volume)



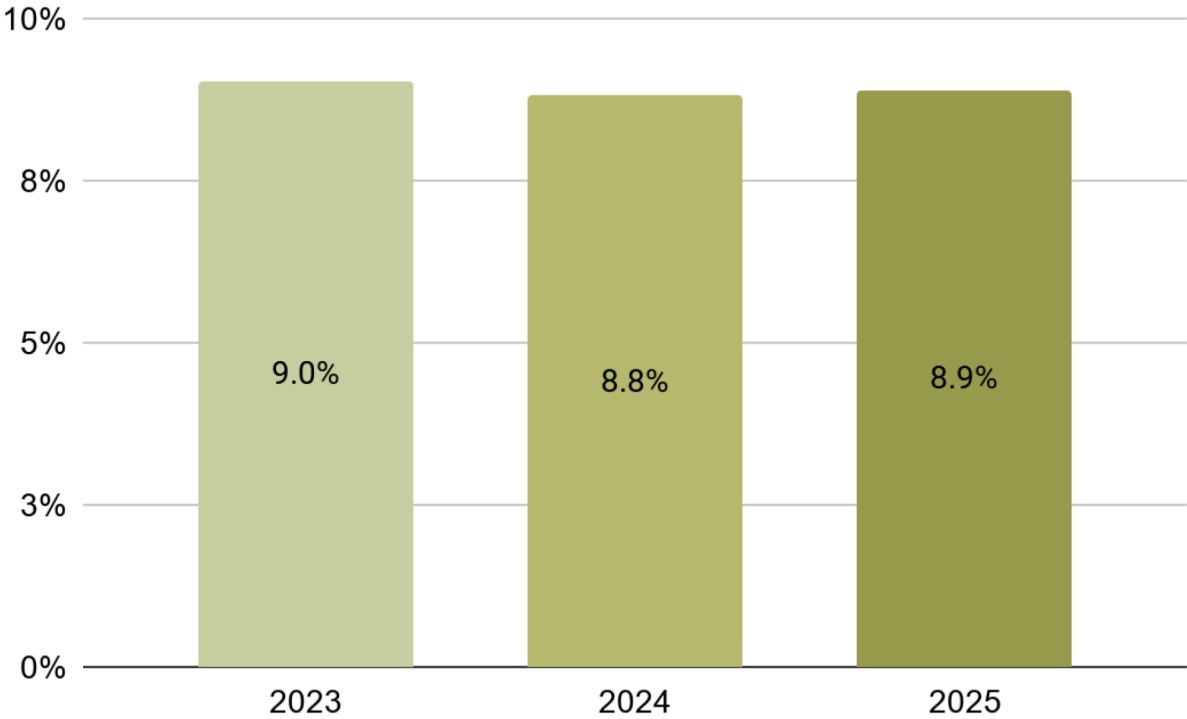
Market share

The market share of plant-based milk and drinks, as a percentage of the overall sales volume of plant-based milk and drinks and animal-based milk,³ remained roughly steady between 2023 and 2025.

During this time, the sales volume of animal-based milk and dairy drinks fell by 2.1%, while that of plant-based milk and drinks fell by 3.8%.

Plant-based milk's market share of roughly 9% demonstrates that this is a relatively mature category in the Netherlands compared with other plant-based dairy categories.

Plant-based milk and drinks: share of the Netherlands' total (plant- and animal-based) milk and drinks market, 2023-2025 (% of sales volume)



³ Including milk and flavoured milk drinks.

Price trends relative to animal equivalent

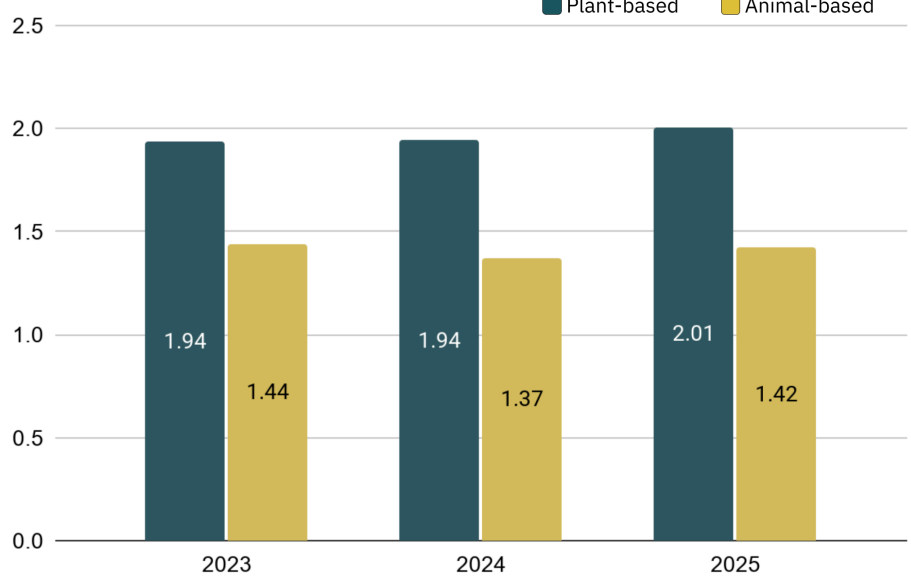
In 2024, the price of animal-based milk and drinks fell while the price of plant-based products stayed level. This led to an increase in the price gap, with plant-based products costing 41% more per litre.

In 2025, however, both plant- and animal-based milk and drinks grew more expensive, so the price gap remained constant.

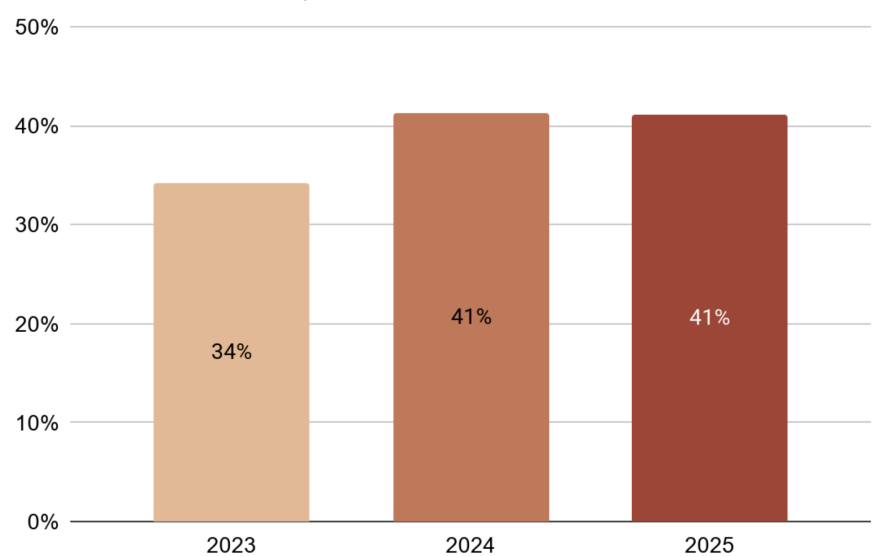
The cheapest segment in 2025 was private-label soy-based milk and drinks. At €0.83/litre, they were 29% cheaper than private-label animal-based milk and drinks. However, this price advantage did not increase sales, as their sales volume fell 3.8% in 2025.

A [sensory study](#) by NECTAR, conducted with American consumers and products, found that while 61% of participants liked the taste of a dairy milk benchmark product, only 34% liked plant-based milk, on average. However, there was a spread in performance between products, with 54% liking the top-performing plant-based milk product. This suggests that innovation to improve product performance is important and can lead to increased consumer acceptance.

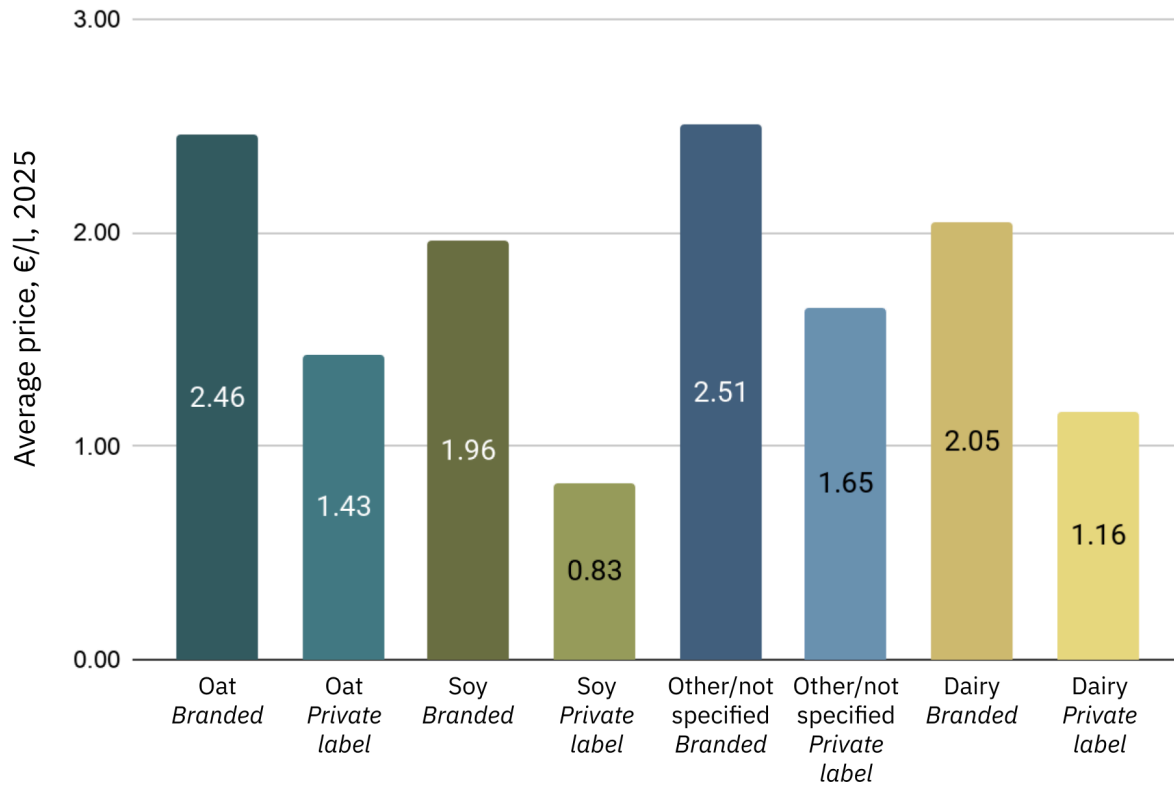
Average price per litre for plant-based and animal-based milk and drinks in the Netherlands, 2023-2025 (€/l)



Price difference for plant-based milk and drinks compared to animal-based milk and drinks in the Netherlands, 2023-2025 (% difference based on €/l)



Average price per litre for selected plant-based and animal-based milk and drinks in the Netherlands, by branded or private label, 2025 (€/l)



Plant-based cheese

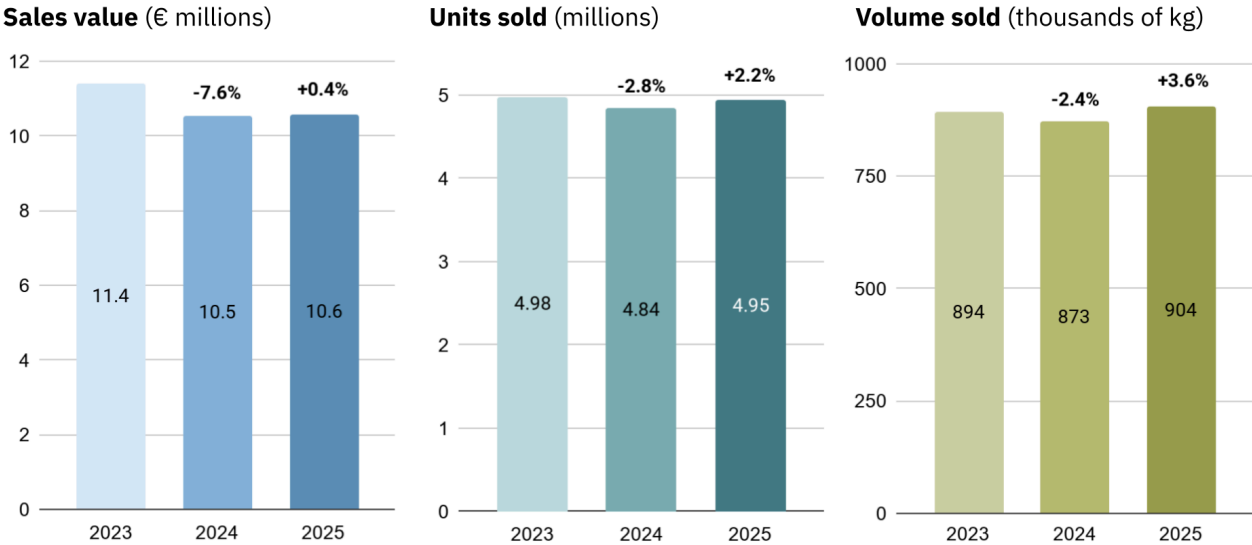
Total market

The small Dutch market for plant-based cheese rebounded in 2025, as sales volume rose by 3.6% to 904,000 kg, surpassing the 2023 sales volume by 1.1%, after a 2.4% fall in 2024.

Annual sales value remained fairly steady at €10.6 million in 2025 – a 0.4% increase from 2024, but 7.2% lower than in 2023. Unit sales were 4.95 million in 2025, up by 2.2% from 2024 but down by 0.7% from 2023.

The difference between the growth in sales volume and steady of sales value in 2025 implies that average prices per kg fell, driven by trends in private-label products.

Plant-based cheese sales in the Netherlands, 2023-2025



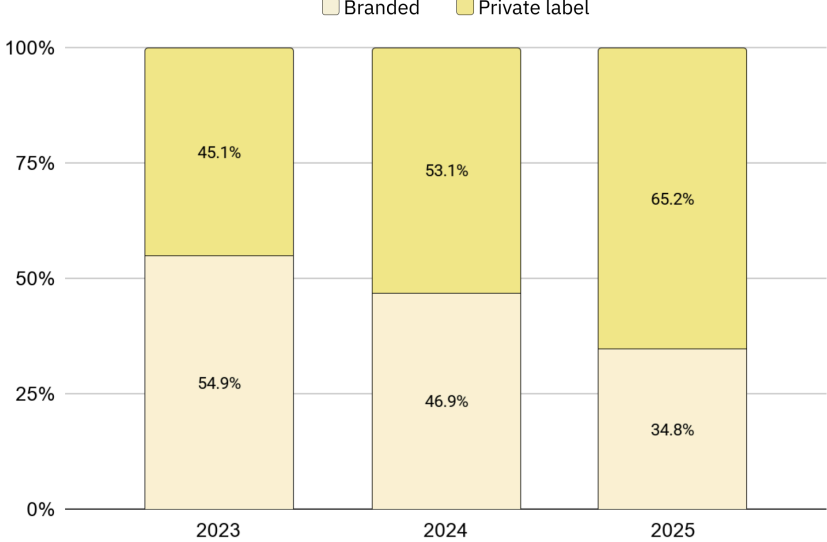
Branded versus private label

Private-label products saw their share of plant-based cheese sales volume rise steadily, from less than half in 2023 to nearly two-thirds of the market in 2025.

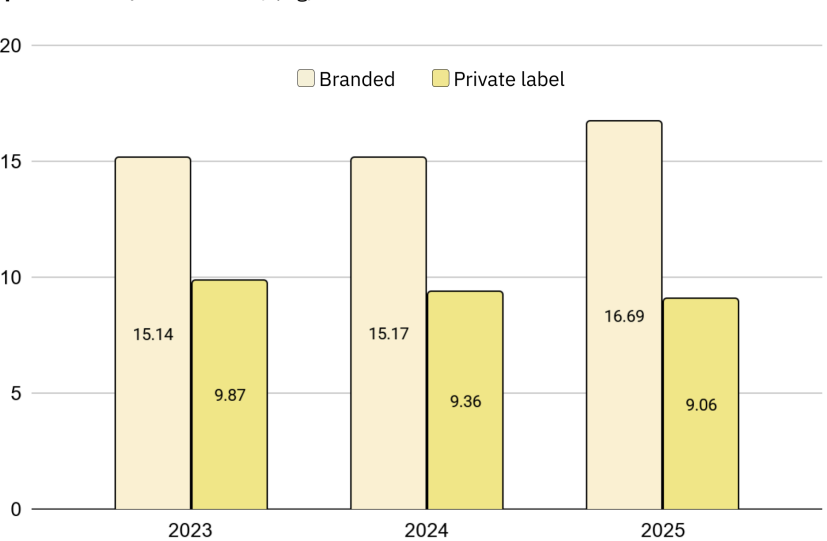
Prices of private-label products were significantly lower and fell over time, whereas branded products continued to become more expensive. By 2025, private-label plant-based cheese was 46% cheaper per kg than branded.

The falling price and growing market share of private-label products pulled down the average price of plant-based cheese over time, as shown in the section “Price trends”, below.

The Netherlands plant-based cheese sales by branded or private label, 2023-2025 (% of sales volume)



Average price per kg of plant-based cheese in the Netherlands, by branded or private label, 2023-2025 (€/kg)

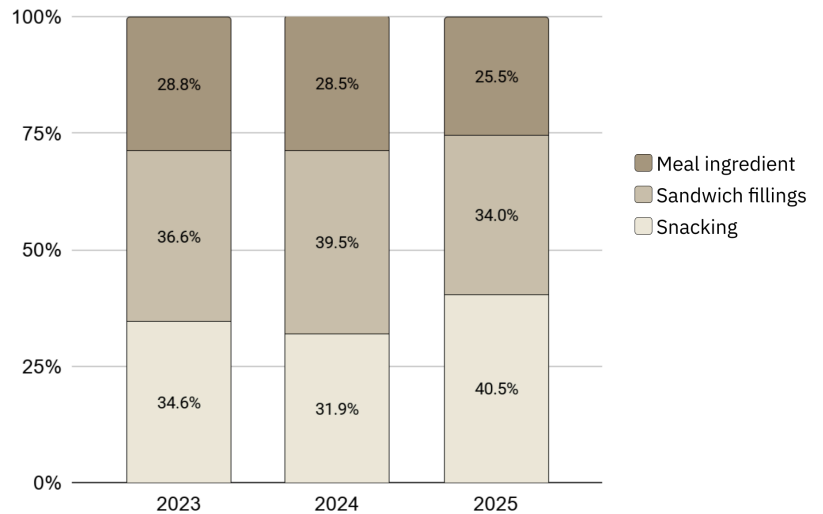


Product format breakdown

Cheese for snacking (as categorised by Circana) was the predominant format in 2025, at 40.5% of sales volume.

The market share of meal ingredients and sandwich fillings both fell in 2025.

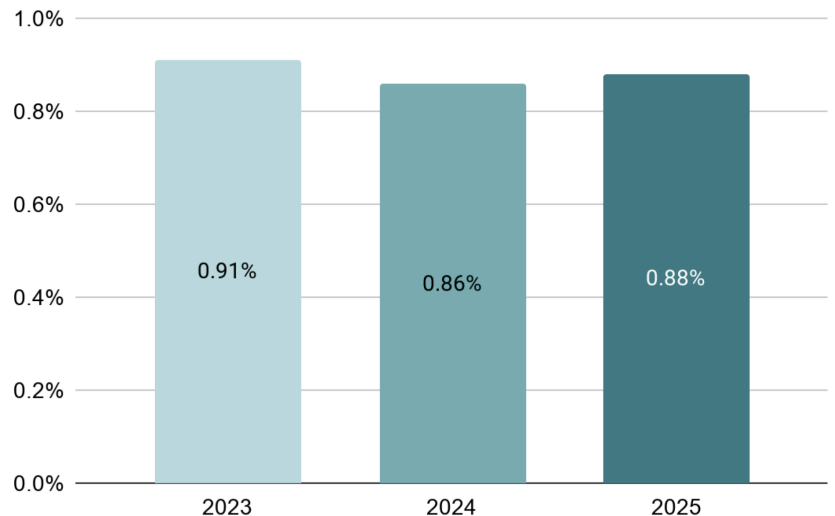
Netherlands plant-based cheese sales by type, 2023-2025
(% of sales volume)



Market share

Plant-based cheese remains a niche category in the Netherlands. It was not possible to calculate the market share on the basis of sales volume. However, on the basis of unit sales, plant-based cheese accounted for less than 1% of overall sales of pre-packaged plant- and animal-based cheese.

Plant-based cheese: share of the Netherlands' total (plant- and animal-based) cheese market, 2023-2025 (% of unit sales)



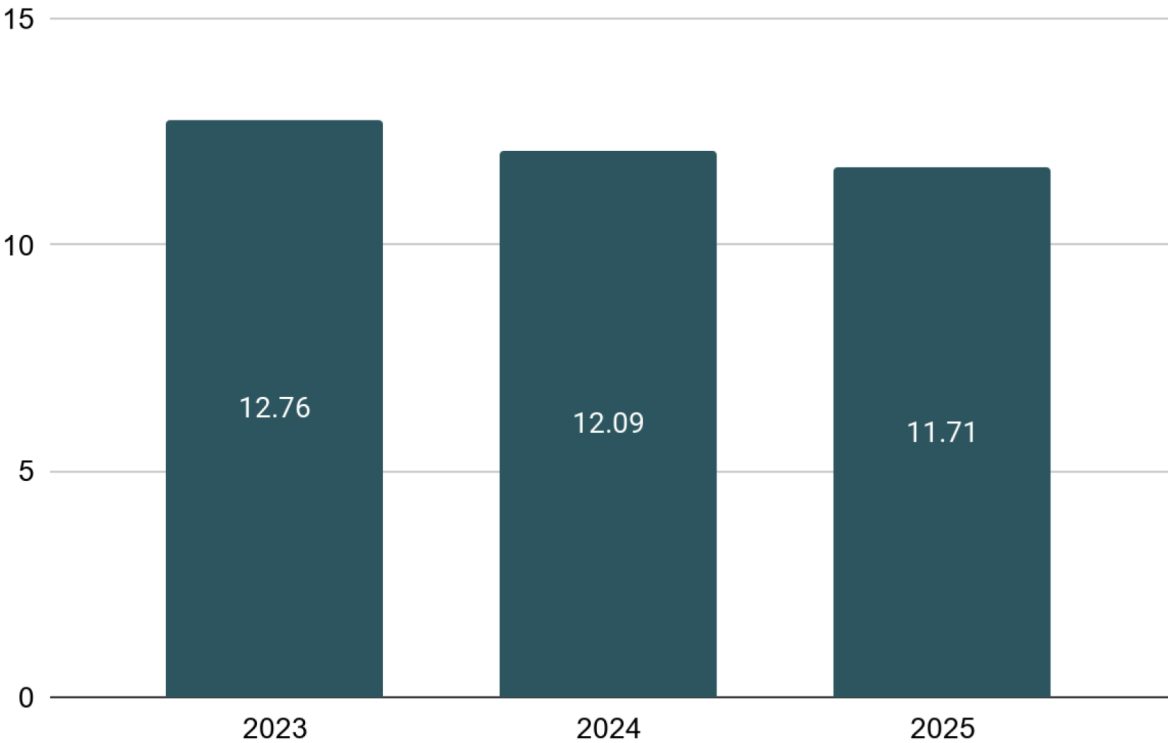
A study conducted by [NECTAR](#) in the United States found a large gap in the performance of plant-based and animal-based cheeses. They found 66%, 74% and 78% of participants liked animal-based cheddar, cream cheese and mozzarella, respectively, compared with just 40%, 33% and 22% liking the plant-based equivalents. Although this study did not include Dutch products or consumers, it shows that the performance of plant-based cheese needs to advance significantly to reach a larger audience. Opportunities for improvement included making the cheese taste richer and minimising off-flavours.

Price trends

As data on the sales volume of animal-based cheese was not available, it was not possible to compare the average prices per kg for plant- and animal-based cheese.

Plant-based cheese prices fell by 7% between 2023 and 2025 because of the rise of relatively cheap private-label products.

Average price per kg for plant-based cheese in the Netherlands, 2023-2025 (€/kg)



Plant-based yoghurt

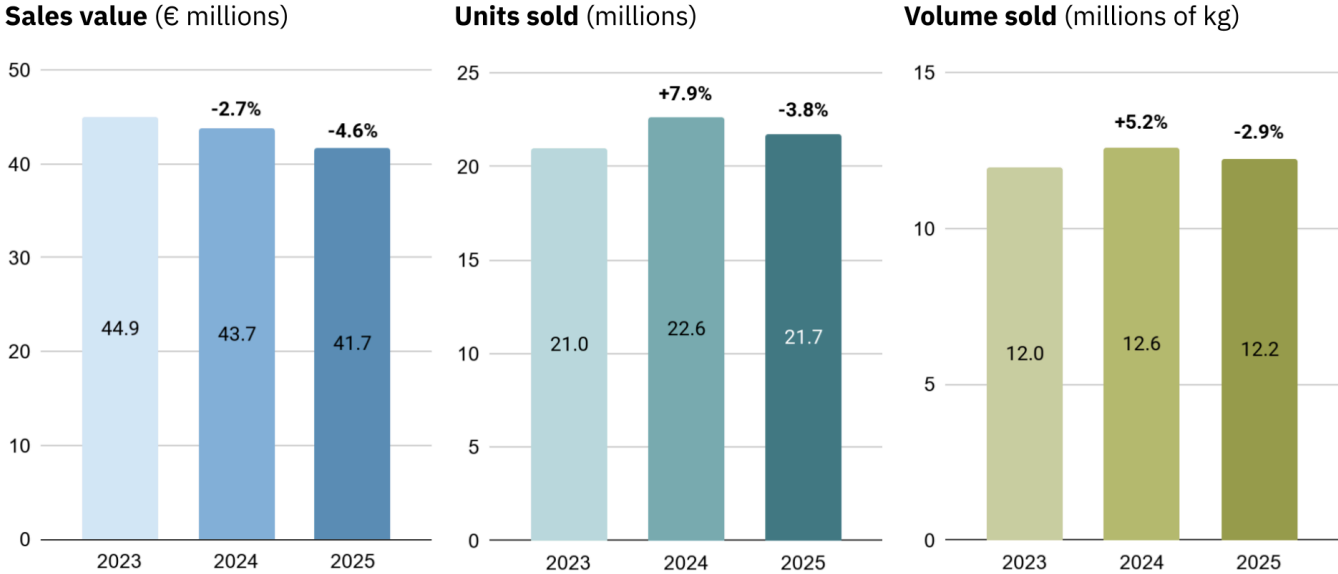
Total market

Demand for plant-based yoghurt in the Netherlands fell in 2025 after a peak in sales volume in 2024.

Annual sales value fell by 4.6% in 2025 to €41.7 million, down by 7.2% from 2023. Unit sales rose by 7.9% in 2024 before falling by 3.8% in 2025 to 21.7 million – 3.8% higher than in 2023. Sales volume rose by 5.2% in 2024 before falling by 2.9% in 2025 to 12.2 million kg – 2.1% higher than in 2023.

The difference in trends between sales volume and sales value indicates falling average prices, partly due to the rise of cheaper private-label products.

Plant-based yoghurt sales in the Netherlands, 2023-2025

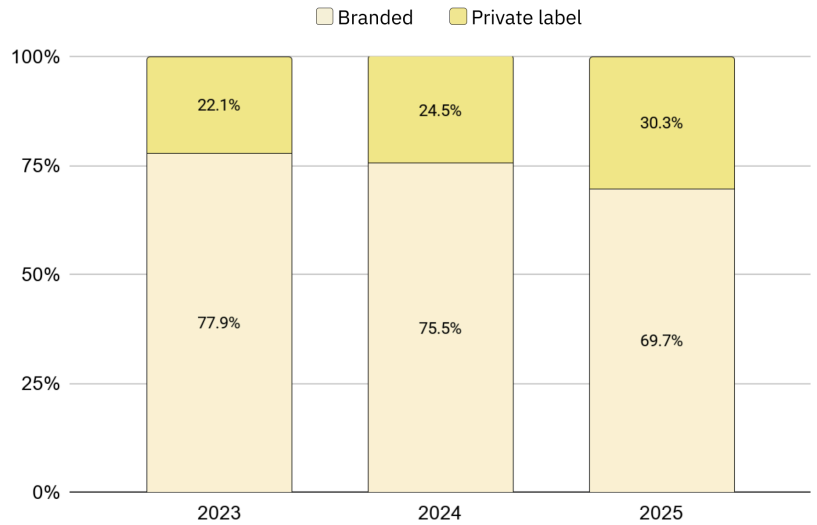


Branded versus private label

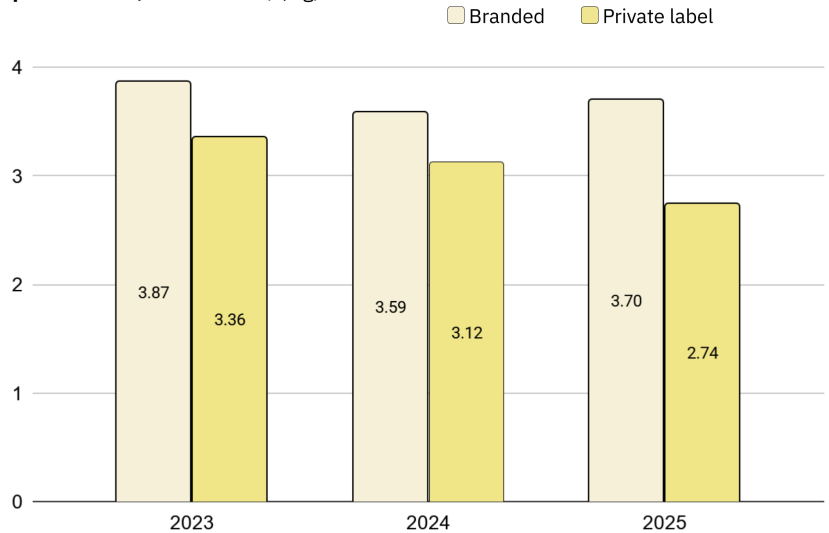
Private-label products saw their share of plant-based yoghurt sales volume rise from 22.1% in 2023 to 30.3% in 2025, possibly driven by their lower price point.

By 2025, private-label products were 26% cheaper per kg than branded.

The Netherlands plant-based yoghurt sales by branded or private label, 2023-2025 (% of sales volume)



Average price per kg of plant-based yoghurt in the Netherlands, by branded or private label, 2023-2025 (€/kg)



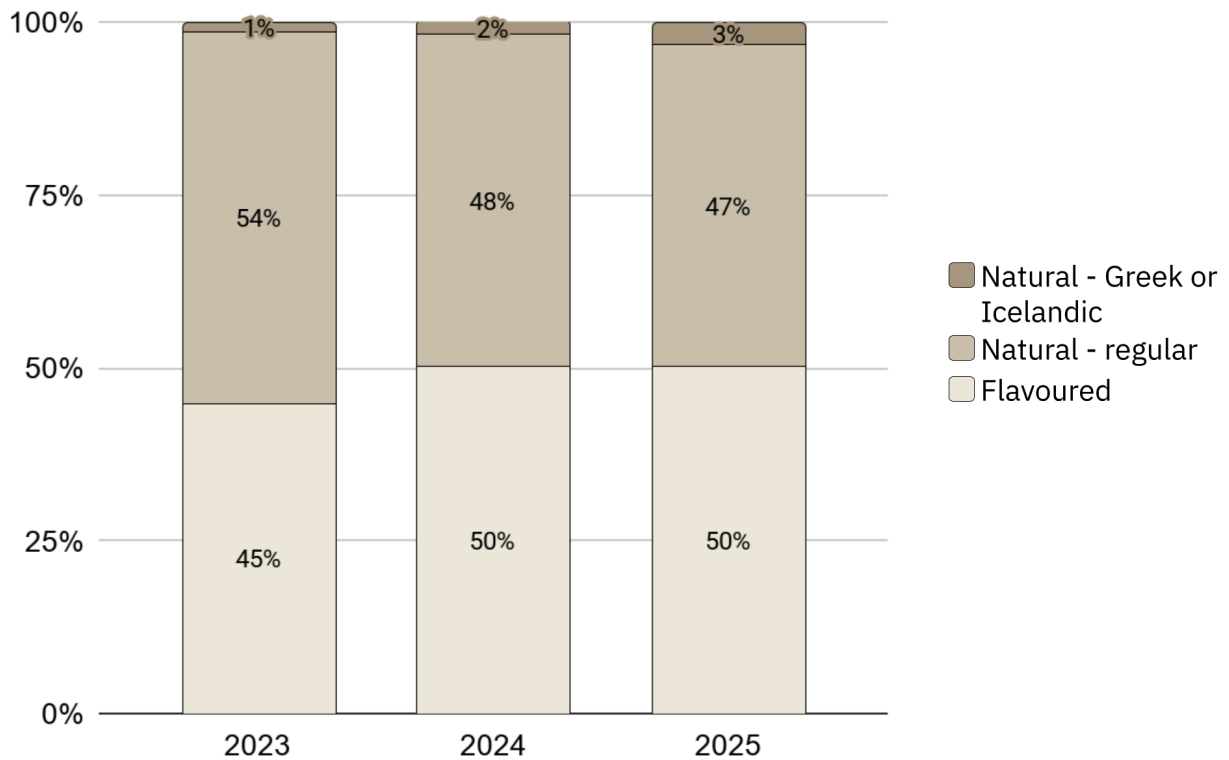
Product format breakdown

The market is split equally between natural (unflavoured) plant-based yoghurts and those with added flavouring.

Greek or Icelandic styles of yoghurt, which are typically thicker and creamier, have seen some growth.

Regular natural yoghurts were the cheapest, at €2.85/kg in 2025, compared with €3.93/kg for flavoured and €3.39/kg for natural Greek or Icelandic style yoghurts.

Netherlands plant-based yoghurt sales by type, 2023-2025 (% of sales volume)



Market share

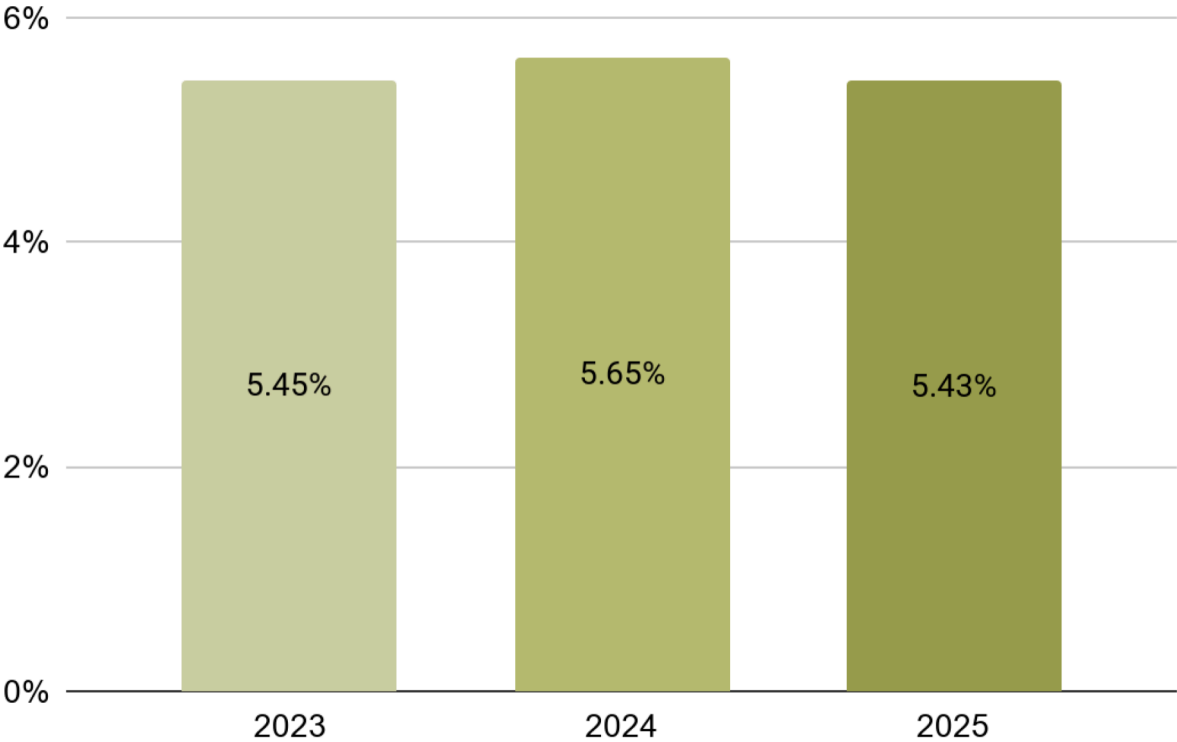
The sales volume of animal-based yoghurt rose by 2.5% between 2023 and 2025, while that of plant-based yoghurt rose by 2.1%.

The market share of plant-based yoghurt, as a percentage of overall yoghurt sales, peaked in 2024 before falling slightly to 5.43% in 2025.

This indicates that while plant-based yoghurt is better-established than plant-based cheese, it has not yet achieved the same reach as plant-based milk and drinks.

The [NECTAR sensory study](#) found that only 26% of participants in the United States liked plant-based yoghurt, on average across several products, whereas 49% liked the dairy yoghurt benchmark. This suggests that plant-based yoghurt needs to perform better to reach more consumers. Specific areas for improvement identified by the study include a whiter, brighter appearance, the reduction of off-tastes and increased richness.

Plant-based yoghurt: share of the Netherlands' total (plant- and animal-based) yoghurt market, 2023-2025 (% of sales volume)

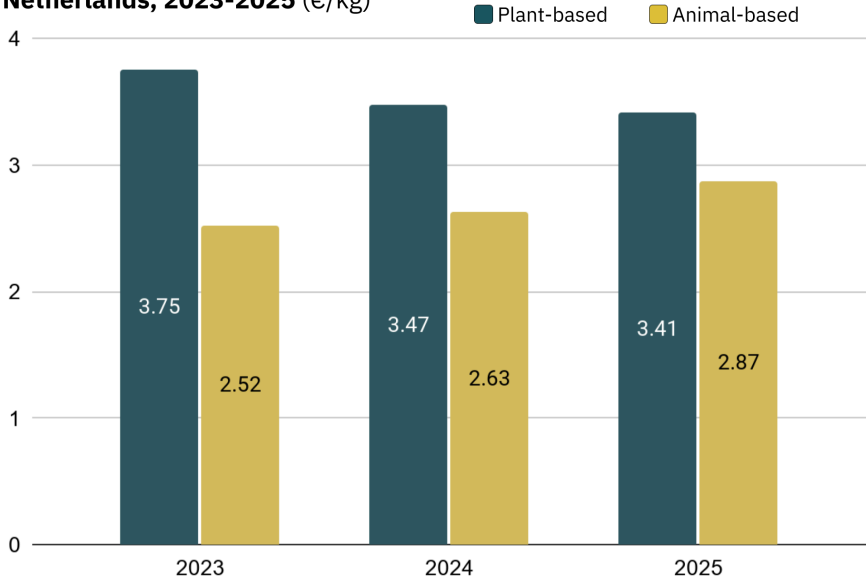


Price trends relative to animal equivalent

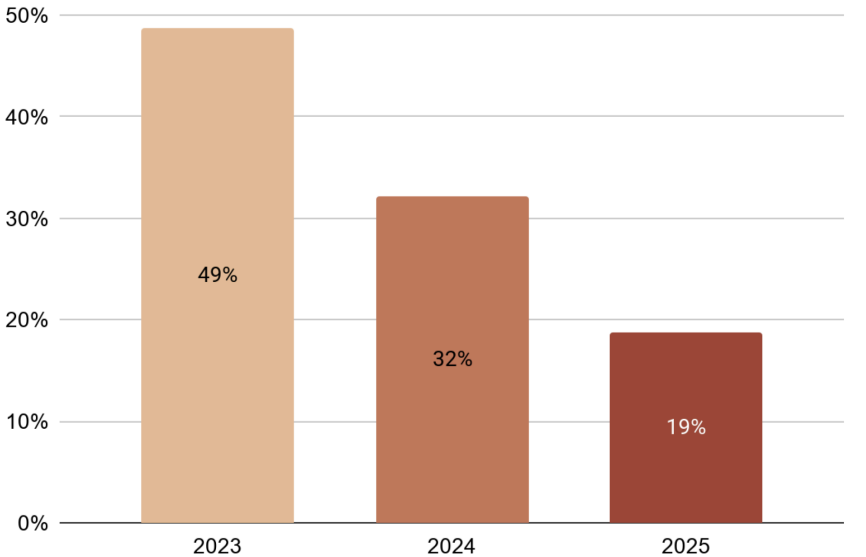
Plant-based yoghurt got cheaper over time while animal-based yoghurt got more expensive, resulting in a narrowing price gap. In 2025, plant-based yoghurt was just 19% more expensive than animal-based yoghurt.

The reduction in average price can be attributed partly to the rise of affordable private-label products, as branded plant-based yoghurt prices actually rose in 2025.

Average price per kg for plant-based and animal-based yoghurt in the Netherlands, 2023-2025 (€/kg)



Price difference for plant-based yoghurt compared to animal-based yoghurt in the Netherlands, 2023-2025 (% difference based on €/kg)



Plant-based cream

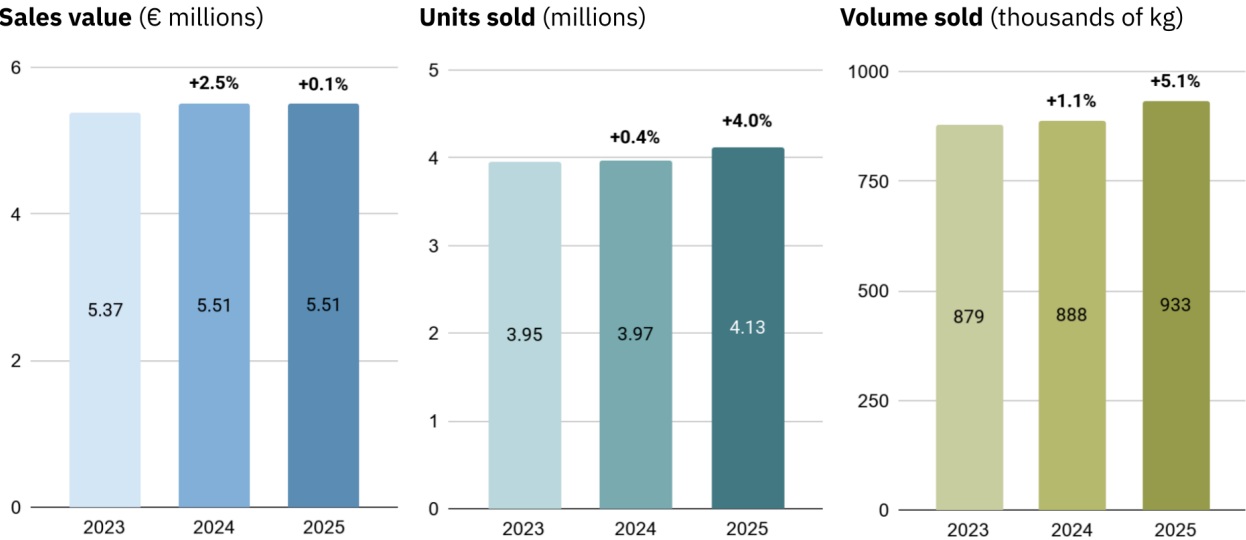
Total market

Demand for plant-based cream in the Netherlands accelerated in 2025.

Annual sales value reached €5.51 million in 2025, roughly the same level as in 2024 and up by 2.6% from 2023. Unit sales rose by 4.0% in 2025 to 4.13 million, up by 4.4% compared with 2023. Sales volume rose by 5.1% in 2025 to 933,000 kg, 6.2% higher than in 2023.

The higher rise in sales volume during 2025, compared with that of sales value, indicates falling average prices. Indeed, combined with rising prices of animal-based cream, this trend meant that in 2025, plant-based cream was 6% cheaper per kg than its dairy equivalent.

Plant-based cream sales in the Netherlands, 2023-2025



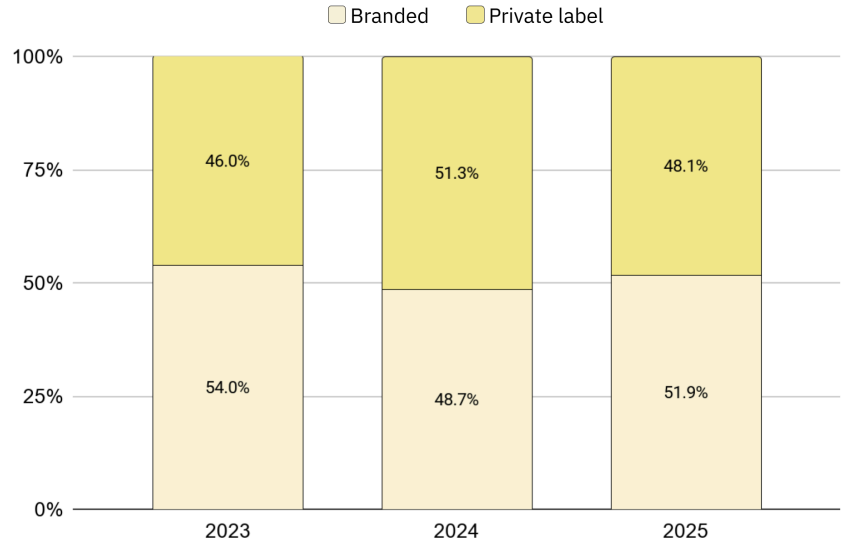
Branded versus private label

The market was split roughly evenly between branded and private-label products. There was a slight rise in the proportion of branded products in 2025, reaching 51.9% of sales volume.

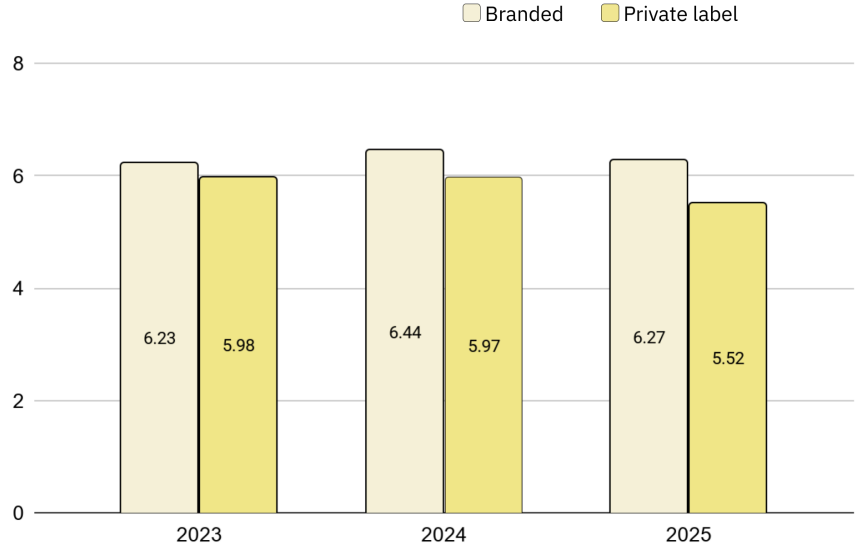
Private-label products had a slight price advantage, which grew over time. In 2025, they were 12% cheaper per kg than branded options.

The fact that private-label products accounted for nearly half the market, particularly with a narrower price advantage than in other plant-based categories, suggests that they are meeting the taste and performance expectations of many consumers. However, it is not clear to what extent the large proportion of private-label products is caused by affordability versus taste performance.

The Netherlands plant-based cream sales by branded or private label, 2023-2025
(% of sales volume)



Average price per kg of plant-based cream in the Netherlands, by branded or private label, 2023-2025 (€/kg)

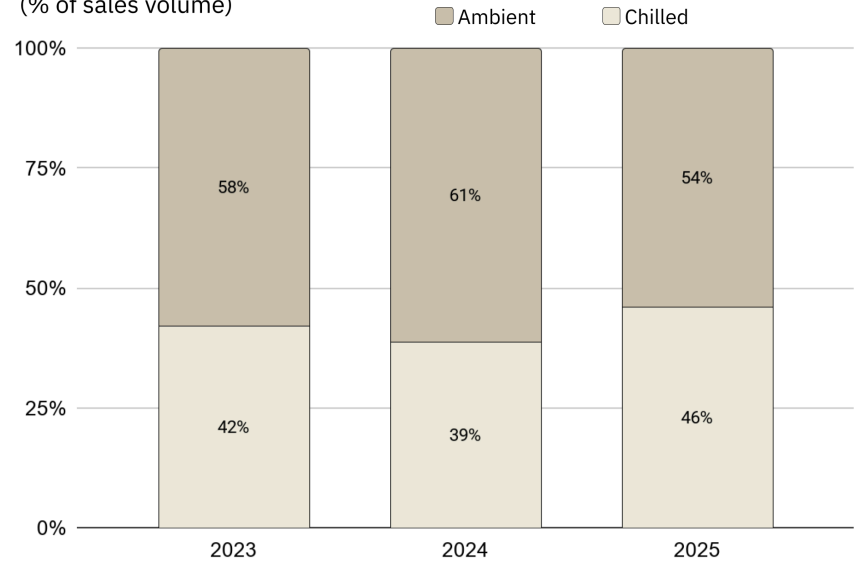


Product format breakdown

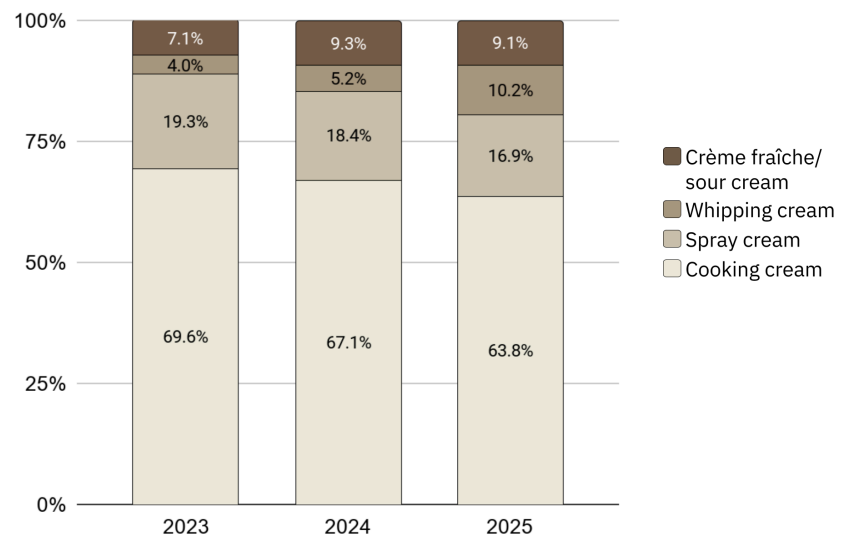
Most products sold were ambient, although there was a jump in the proportion of chilled products in 2025, reaching 46% of sales volume.

Most sales were of cooking cream, although this proportion fell over time along with that of spray cream. Whipping cream sales volume doubled between 2024 and 2025.

Netherlands plant-based cream sales by temperature, 2023-2025
(% of sales volume)



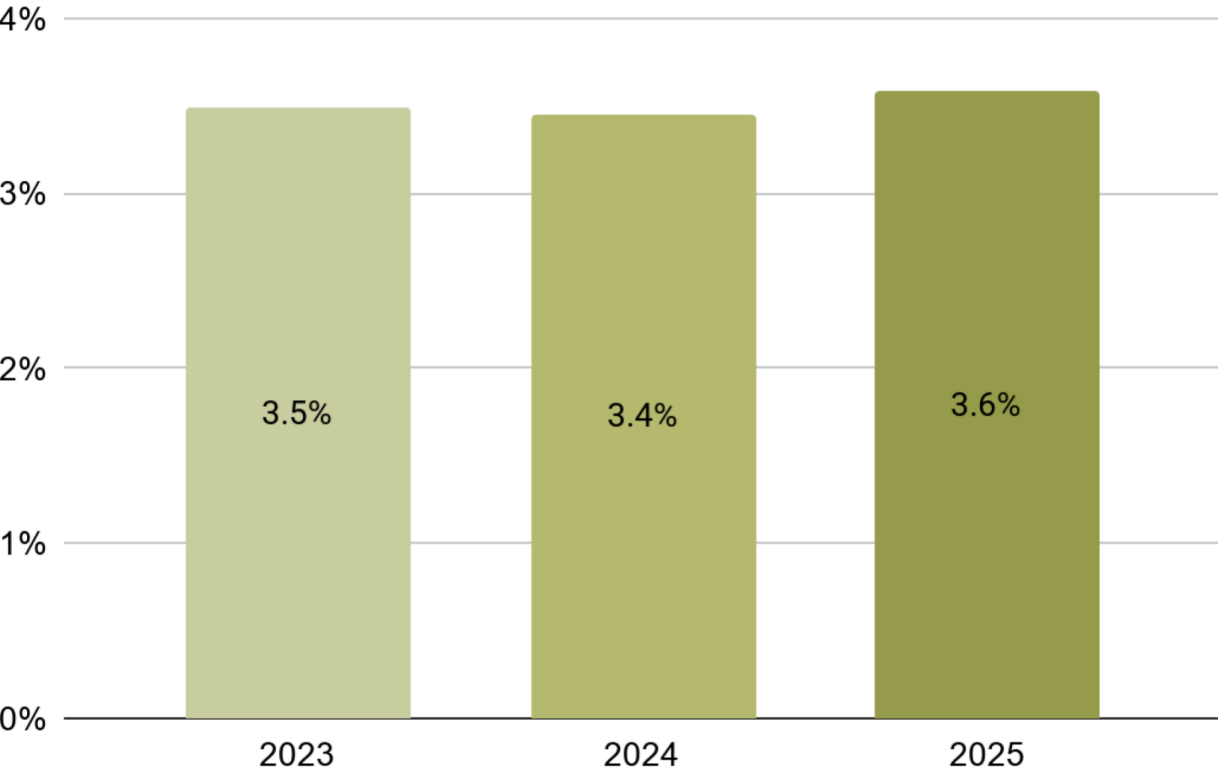
Netherlands plant-based cream sales by type, 2023-2025
(% of sales volume)



Market share

The market share of plant-based cream, relative to the total sales volume of plant- and animal-based cream, grew to 3.6% in 2025. Between 2023 and 2025, the sales volume of animal-based cream rose by 3.4%, and that of plant-based cream rose by 6.2%. The market share shows that while plant-based cream is better established than the niche category of plant-based cheese, it still has not achieved the same reach as plant-based milk and drinks.

Plant-based cream: share of the Netherlands' total (plant- and animal-based) cream market, 2023-2025 (% of sales volume)



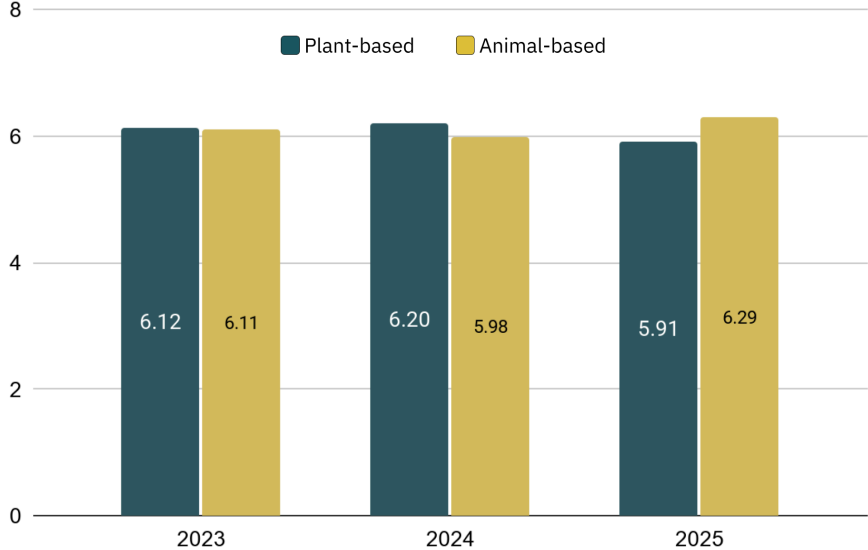
Price trends relative to animal equivalent

In 2023, plant-based cream cost the same as animal-based cream and in 2024, it became 4% more expensive per kg.

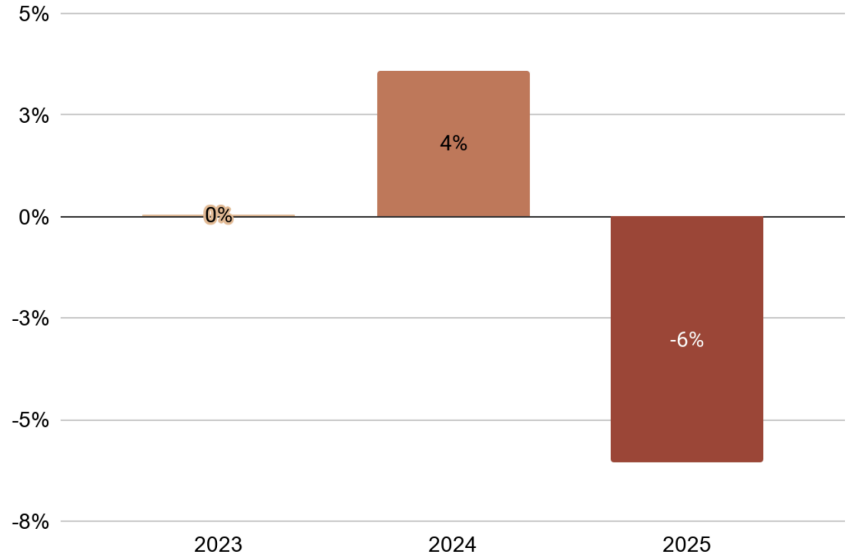
This position reversed in 2025, however, when plant-based cream became 6% cheaper.

This improvement in affordability happened alongside a rise in plant-based cream sales volume, suggesting that price may have contributed to the rebound in sales.

Average price per kg for plant-based and animal-based cream in the Netherlands, 2023-2025 (€/kg)



Price difference for plant-based cream compared to animal-based cream in the Netherlands, 2023-2025 (% difference based on €/kg)



Closing remarks

The Netherlands is a world-leading champion of protein diversification, with supermarkets committed to boosting sales of plant-based foods, and animal meat consumption having reached its lowest point in 20 years in 2024. However, our analysis paints a mixed picture for the plant-based sector.

While some smaller categories saw rising sales as prices per kg fell, larger categories faced headwinds.

Plant-based options now represent 9% of all milk sold in the Netherlands – but rising prices contributed to sales stabilising in 2025. The rapid growth of barista-style milk, despite its higher price, demonstrates the importance of good product functionality.

Plant-based meat sales were down significantly last year, driven by a rapid drop-off in sales of branded products.

Some consumers may have shifted towards tofu, tempeh and seitan, which saw impressive growth in 2025. Price could be driving this trend, as branded plant-based meat cost three times more per kg than private-label tofu in 2025. But with Dutch consumers buying 3.6 times more plant-based meat than tofu, tempeh and seitan combined, it's clear that products replicating the taste and format of meat retain broader appeal.

To deliver on their targets for protein diversification, policymakers and food industry leaders must remove barriers for consumers through investment in improving taste and reducing prices.

Helen Breewood,

Senior Market and Consumer Insights Manager at the Good Food Institute Europe



About the Good Food Institute Europe

[The Good Food Institute Europe](#) is a nonprofit think tank helping to build a more sustainable, secure and just food system by diversifying protein production.

We champion the science, policies and investment needed to make alternative proteins delicious, affordable and accessible across Europe.

By advancing plant-based foods, cultivating meat from cells and producing ingredients through fermentation, we can boost food security, meet our climate targets and support nature-friendly farming. GFI Europe is powered by philanthropy.

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