

The battle for the Dutch basket

New rules for innovation and growth in F&B



Management summary

The Dutch food and beverage (F&B) market is becoming harder to win as consumers increasingly reassess what deserves a place in their basket. Long-established purchasing habits are weakening, and switching between brands and private label is becoming more common. As experimentation with new products and categories accelerates and every position in the basket is increasingly contestable, no brand can rely on habit alone.

Roland Berger's survey of 1,300 Dutch consumers points to three questions that are at the heart of every purchasing decision:

1. **Is it worth it?** Consumers remain uncompromising on value: despite growing interest in health, sustainability and functionality, price and taste remain the two most important purchasing criteria
2. **Is it good for me?** Health and wellbeing influence everyday purchasing decisions for most consumers, with 58% considering nutritional claims important
3. **Is it relevant for me?** Consumer priorities are fragmenting – distinct demand profiles define value, quality and health differently, creating opportunities for tailored propositions:
 - **"Pragmatic optimizers"** seek the best balance between quality and value – 66% of consumers who increased their private label consumption mention price as the reason
 - **"Product explorers"** actively experiment with new products, categories and habits, including categories under increasing scrutiny such as ultra-processed foods
 - **"Premium functionalists"** prioritize health, wellbeing and functionality, and are willing to pay for products that deliver tangible benefits

These findings suggest that the battle for the Dutch F&B basket is increasingly a battle for relevance. Today's Dutch consumer is not defined by price sensitivity, taste, health consciousness or sustainability preferences alone, but by a growing willingness to reevaluate what earns a place in the basket. Winning companies will be those that deliver superior value through innovation and targeted portfolio choices, converting trial into lasting loyalty.

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42 %

buy more
private label
than last year



24 %

used or
planned to use
GLP-1 drugs



58 %

consider
nutritional
claims
important

1

Introduction

The food and beverage (F&B) market is navigating an increasingly demanding environment. As consumers around the globe tighten their wallets and contend with multiplying options for every product, F&B players find themselves grappling with sustained volume pressure. The Netherlands is no exception. Retail volume of F&B sales in the Dutch market has dropped by 11% over the last five years.¹

¹ "Retail volume sales for F&B and tobacco in the Netherlands", Eurostat

This volume pressure is a consequence of the dynamics playing out in the consumer shopping basket. Consumers are continuously reassessing what earns a place in their basket, so competition for a place has intensified significantly. Private label is gaining relevance, consumer exposure to new propositions is higher than ever, and trial is more difficult to convert into habit. Companies that consistently meet consumer expectations can strengthen basket relevance; those that do not risk being replaced by the next available alternative.

Ultimately, every purchasing decision made by a Dutch consumer can be traced back to three questions:

1. Is it worth it?

Price and taste remain the two constants underpinning Dutch purchasing decisions. Other attributes, such as health benefits, natural ingredients, convenience or sustainability, can strengthen a proposition, but they rarely compensate for a product perceived as too expensive or one that fails to deliver on taste. Across categories and consumer groups, price and taste are the minimum requirement for consideration and repeat purchase.

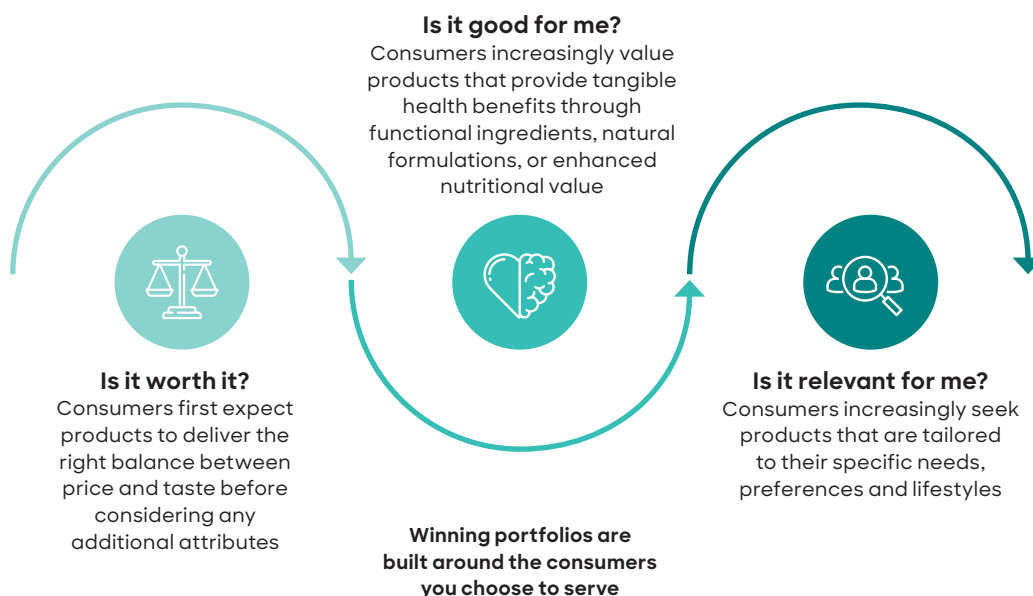
2. Is it good for me?

Health is no longer confined to specialist aisles or dedicated wellness occasions; it is embedded in everyday life, shaping food and beverage choices and the dietary supplements consumers take. Consumers are looking for tangible added benefits, whether through functional ingredients, natural formulations or enhanced nutritional value. While the relevance of specific health credentials varies by category and consumer profile, their importance as a source of competitive advantage is growing.

3. Is it relevant for me?

Beyond the universal importance of price and taste, preferences differ meaningfully across age, income, lifestyle and health orientation. As demand becomes increasingly fragmented, broad propositions designed for the average consumer risk lacking relevance for any specific demand profile. Winning propositions start with a clear definition of the target consumer and are built around that profile's priorities, trade-offs and willingness to pay.

Three questions behind every purchase



Source: Roland Berger

To shed light on these dynamics, Roland Berger conducted a survey among 1,300 Dutch consumers at the end of 2025. The survey sought to understand consumer behavior in terms of purchasing drivers, health consciousness, and the dynamics between brands and private labels.

2 The basket is up for grabs

Every purchasing decision reflects a set of deliberate trade-offs, with consumers increasingly reassessing what earns a place in their basket. The Dutch basket is no longer shaped by habit alone. Consumers readily switch between branded and private label products on a product-by-product basis, continuously evaluating which option offers the highest value. High trial rates in emerging categories such as alternative proteins further underline consumer openness to experimentation, although sustained adoption depends on products meeting core expectations. At the same time, health and wellness considerations are becoming increasingly embedded in everyday choices. Together, these shifts point to a consumer who is more informed, more critical, and more willing to reconsider established preferences than ever before.

2.1/ Does the brand still deliver relevance?

The Dutch consumer basket is not a binary choice between brands and private label; it is a mix of both. The majority of Dutch consumers (66%) regularly buy a combination of branded and private label products, while 21% buy mostly private label and only 13% stick predominantly to brands. This suggests that loyalty is increasingly earned at the product level rather than by brand or label alone.

From a generational perspective, older adults (55+ years old) show higher private label adoption, with 24% buying mostly private label versus 18% of younger consumers (18-34 years old). Younger consumers' slightly higher propensity for branded products (15% versus 10% of older adults) is partly explained by the choice of F&B categories in their baskets and potentially their greater exposure to digital marketing and social media, making them more responsive to brand image, trends and marketing activity.² ▶ A

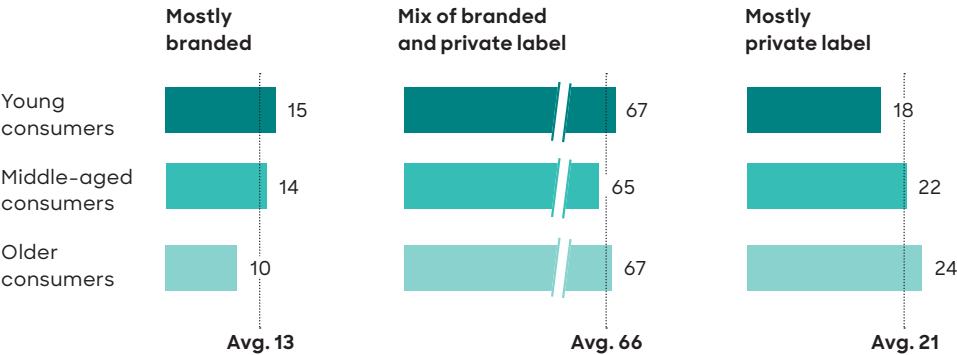
2 "The food and beverage cues in digital marketing model: special considerations of social media, gaming, and livestreaming environments for food marketing and eating behavior research", Pubmed

A **Choice between branded or private label products**
[% of respondents]



"When choosing food and beverage products, do you typically buy branded or private label products?"

n = 1300



Source: Roland Berger

That being said, demand for private label is rising: around 42% of Dutch consumers increased their private label purchases in 2025 compared to 2024, with private label now representing 47% of the total value of consumer purchases.³ For retailers, private label growth is an opportunity to build on categories where consumer trust has already been established, while protecting affordability as the core competitive lever. But for branded players, it is a warning signal: brand-driven loyalty is no longer sufficient. In the recent affordability crisis, branded players have grown through price hikes. Poorly executed revenue growth management (RGM) has done little for real growth or volumes. In fact, as innovation at the large F&B players has stalled in a stagnant, one-size-fits-all system focused on cost-cutting, "consumer delight" in these brands has eroded. The resulting consumer downtrading has created opportunities for private label. As private label further closes the gap on both price and quality, brands must rethink their innovation agenda to remain relevant and continue to delight their consumers.

3 "PLMA's 2026 Report On The Status Of Private Label Across Europe", PLMA

2.2/ Consumers experiment with new categories

Consumers' willingness to experiment is another sign that the basket is dynamic. The average respondent has a diversified basket, purchasing across a wide range of product categories. On a daily or weekly basis, 71% consume minimally processed foods, 39% processed beverages, and 47% ultra-processed foods. But a sizeable group consumes these products

less than weekly, namely 24% minimally processed foods, 41% processed beverages, and 47% ultra-processed foods. This suggests that these consumers are not regular buyers of these categories, but instead try out a product from these categories from time to time. Except for processed beverages, few people indicate that they never experiment with processed foods of any kind. Despite growing debate around ultra-processed foods and beverages (UPF), many UPF categories continue to enjoy high consumption frequency. More than 55% of consumers report consuming processed meats, sauces and spreads, savory snacks, carbonated soft drinks, and confectionery once a week or more. Overall, the data points to a consumer base that remains open to experimenting with new categories. ► **B**

B Consumption frequency by product category in the past year [% of respondents]



"Over the past 12 months, how often have you consumed the following types of food and beverages?"

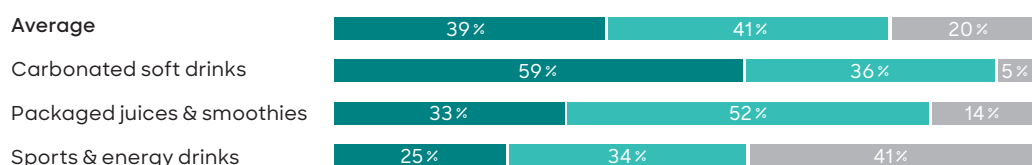
n = 1300

Minimally processed foods



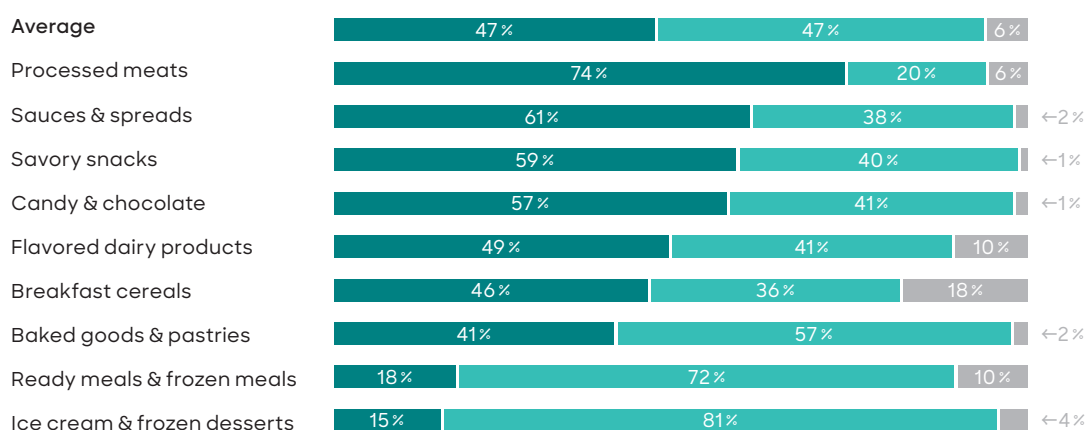
n = 1300

Processed beverages



n = 1300

Ultra-processed foods



■ Daily, almost daily, or a few times per week ■ A few times per month or year ■ Never

Source: Roland Berger

Albert Heijn uses private label to strengthen its advantage

Albert Heijn is the market leader among supermarkets in the Netherlands in terms of revenue, and it has been rapidly gaining ground. Between 2020 and 2025, Albert Heijn grew its market share from 37% to 41%.⁴ Though some of this growth is explained by the acquisition of the Jan Linders supermarket chain in 2023 and the takeover of 38 stores from DEEN in 2021, more than half of the growth was actually organic. So what makes Albert Heijn stand out from its competitors?

One of Albert Heijn's strongest suits is its private label. Of the total product assortment, one-third consists of private label products. Albert Heijn leverages its market-leading position and retailer brand to promote its private label products, but also uses its private labels to further strengthen its premium supermarket positioning. Over the past five years, Albert Heijn expanded its private label assortment, adding Terra for plant-based products (2023), Blue Home for kitchen equipment (2024), and Care for personal care products (2025).

With its private labels, Albert Heijn not only offers more attractively priced products – it specifically targets different consumer segments. In addition to its general private label that mainly offers lower-priced products, Albert Heijn also has private labels that offer more premium products steered toward specific consumer preferences.

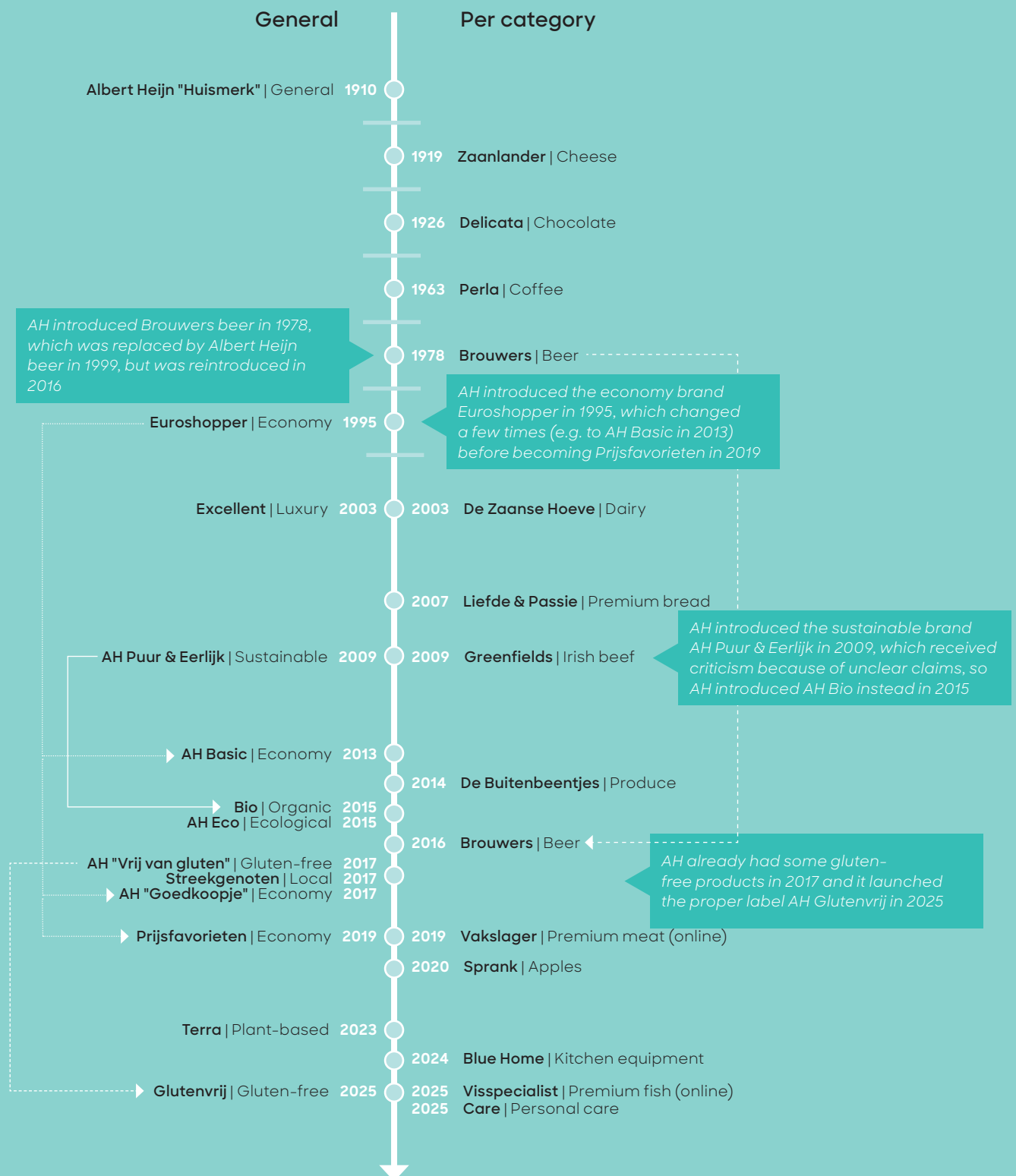
For instance, it targets sustainability-focused consumers through Streeckgenoten for local products and De Buitenbeentjes for imperfectly-shaped fresh produce that would otherwise be used for juices, soup or animal feed. Albert Heijn even has different private labels for premium bread (Liefde & Passie), meat (Vakslager, Greenfields) and fish (Visspecialist), but also sells its own coffee (Perla), dairy (De Zaanse Hoeve) and cheese (Zaanlander).

In this way, Albert Heijn is a good example of how retailers can move beyond a purely price-driven private label strategy toward one that attracts a more diverse group of consumers by matching each private label with its own consumer purchasing criteria – while safeguarding price and taste.

⁴ "Supermarkets in the Netherlands", Euromonitor

⁵ Indicative, non-exhaustive overview based on Albert Heijn website and historic articles

Albert Heijn private label brand introductions over time⁵

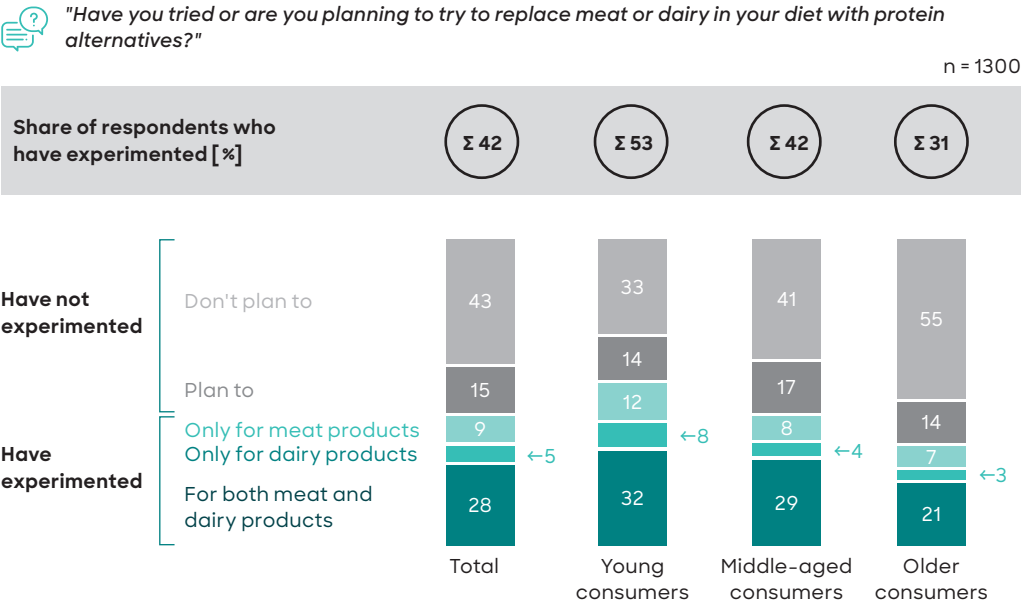


Source: Albert Heijn website, desk research

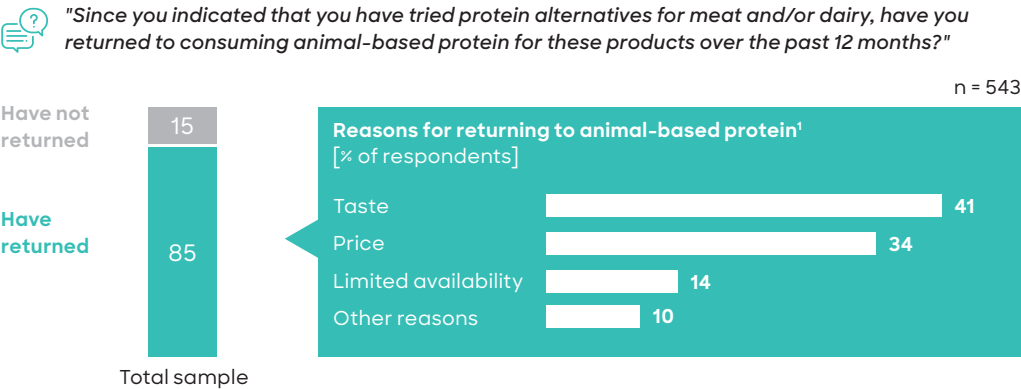
Consumers are not only experimenting with new categories, but also with new products. Nearly half of respondents (42%) have already tried alternative proteins, and a further 15% plan to do so. Among those who have tried alternative proteins, most did so across both meat and dairy products. Younger consumers are particularly open to experimentation, with 53% having tried alternative proteins compared to 42% overall. ► C

However, experimentation does not equal adoption. Of those who tried alternative proteins, 85% have since returned to animal-based products, primarily due to taste (41%) and price (34%). For market players, the implication is clear: experimentation creates an entry point, but only propositions that deliver on expectations can convert trial into repeat purchase and lasting basket share. ► D

C Consumer willingness to experiment with alternative proteins [% of respondents]



D Discontinuation rate with alternative proteins [% of respondents]



¹Multiple choice question - Percentages do not add up to 100

Source: Roland Berger

3

Is it worth it?

Consumers may be experimenting more, but they remain uncompromising on value. Households make deliberate choices about what earns a place in the basket, applying a consistent set of criteria to decide whether a product is worth it. Understanding the weight of these criteria, and how they shift by consumer group and category, is critical to identifying where growth can be captured and how competitiveness can be defended.

3.1/ Price and taste are table stakes

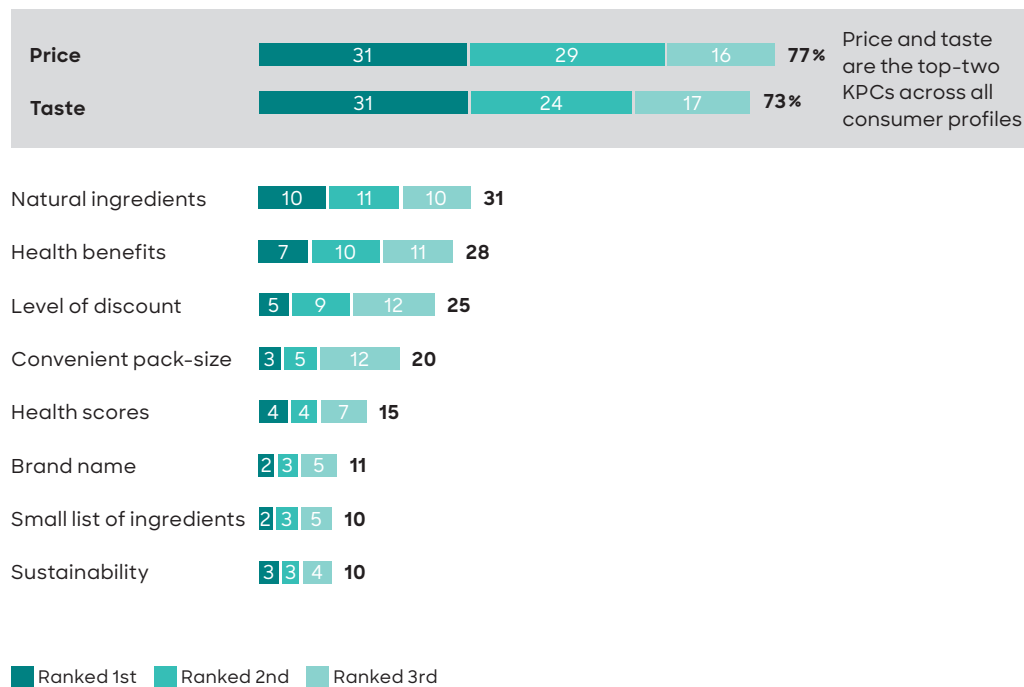
For food and beverages, every purchasing decision starts with price and taste. The survey confirms this: 77% of respondents rank price in their top-three purchasing criteria, and taste follows at a close second at 73%. No other criterion comes close: natural ingredients, ranked third, is cited by just 31% of respondents, a gap of more than 40 percentage points. ► **E**

E Key purchasing criteria by top-three rank [% of respondents]



"What are the most important criteria when purchasing food and beverages today?"

n = 1300



Source: Roland Berger

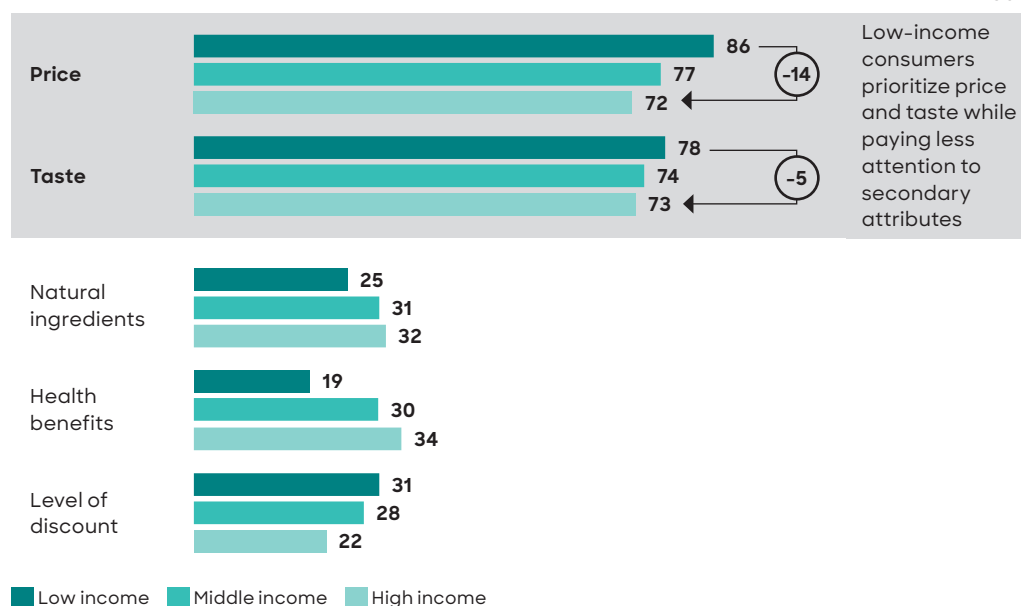
This holds across consumer profiles: young and old, low and high income, health-conscious and sustainability-led. While the relative weight of criteria varies, price and taste remain the dominant purchasing drivers. Even among high-income households, price sensitivity is only slightly lower (72%) and still ranks as the most important criteria. Other criteria are more relevant for high-income households than for the average consumer, but they act as additional layers rather than substitutes for price and taste. ► **F**

F Key purchasing criteria by income group [% of respondents]



"What are the most important criteria when purchasing food and beverages today?"

n = 1300



Source: Roland Berger

The implication is clear: consumers insist on both price and taste, while the relative importance of additional criteria only shifts slightly. This has direct implications for portfolio architecture: regardless of the segment, economic or premium, delivering on both price and taste is non-negotiable.

3.2/ Strong claims are aspirational, not decisive

Dutch consumers are willing to endorse health, convenience and sustainability claims, but will rarely pay for them. After price and taste, other purchasing criteria are primarily linked to health, convenience and sustainability. Yet because price remains the leading criterion, these claims must reinforce the broader value proposition rather than stand alone as premium justifications. If we consider sustainability, for example, 40% of consumers indicate that they find sustainable packaging important and 35% indicate that they find sustainable sourcing claims important. When sustainability is considered in isolation, 40% of Dutch consumers even say they would be willing to pay more for a more sustainable version of a product that they already buy. Interestingly, while older adults place notably higher value on sustainable packaging (49% of older consumers vs. 40% of total consumers), younger adults are more willing to pay for sustainability claims (44% of younger consumers vs. 40% of total consumers). ► **G+H**

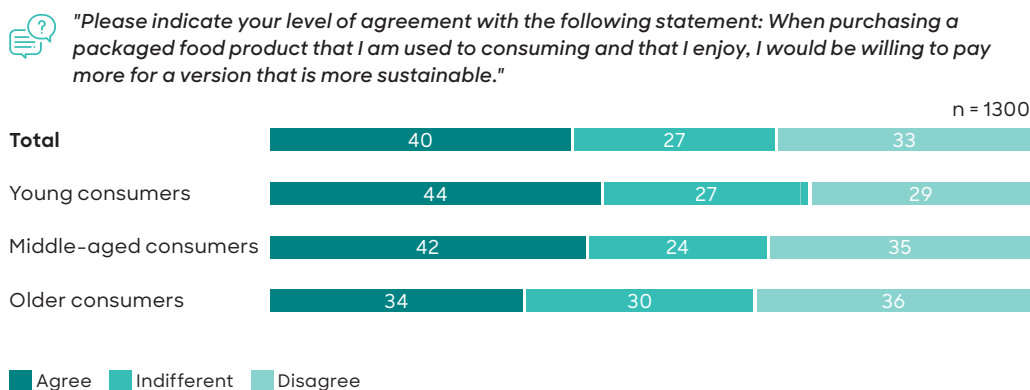
Yet when sustainability is evaluated alongside price, taste and health benefits, as it is in real life, the dynamic shifts. Only 1 in 10 consumers lists sustainability among their top-three purchasing criteria, a figure that shows no meaningful variation across age groups, including the younger consumers who express the strongest willingness to pay for sustainability. The closer the question mirrors an actual purchasing decision, the more sustainability recedes.

G Importance of sustainable packaging and sourcing claims in purchasing decisions [% of respondents]



Source: Roland Berger

H Willingness to pay for more sustainable versions of commonly consumed products [% of respondents]



Source: Roland Berger

This pattern is also evident in purchasing behavior related to alternative proteins. As previously noted, 85% of consumers who have tried alternative proteins have returned to animal-based products. The main barriers to repeat purchases are taste (41%) and price (34%), underscoring their importance as essential purchasing criteria. While consumers are open to trying alternative proteins, sustained adoption requires a compelling combination of appealing taste and attractive pricing. ► D

The implication for market players is clear: strong claims are a "nice-to-have". Consumers expect brands and retailers to offer products that are healthy, convenient and sustainable, but they rarely reward these attributes when they come at the expense of price or taste. Positioning sustainability or functionality as a standalone purchasing driver is unlikely to move the needle. Winning propositions embed these claims into a broader promise of quality and value, ensuring they reinforce rather than compete with the criteria consumers act on.

4

Is it good for me?

Health and wellbeing are becoming part of everyday purchasing decisions. Though an enduring driver of food and beverage innovation, consumer awareness of the role of food in overall health and wellbeing has broadened. Demand for products that support gut health, immunity, protein intake, cognitive performance, and other functional benefits is expanding.

Understanding how Dutch consumers factor health into purchasing decisions is therefore a priority for market players. The survey underscores the relevance of health and wellness: 58 % of Dutch consumers consider nutritional claims important when purchasing food and beverages.⁶ Natural ingredients and health benefits rank third and fourth among purchasing criteria overall, showing that health is no longer a niche consideration but an important element of the purchasing decision.

The growing importance of health and wellbeing is also shown by the share of consumers who are purchasing dietary supplements. These are shifting from an occasional remedy to a daily habit, but not all categories are created equal. A growing focus on preventive health and personalized wellbeing has made supplements a consistent growth category within consumers' broader F&B spending basket.⁷

⁶ Survey question: How important are nutritional claims (e.g. low sugar, high protein, high fiber, low salt, high Nutri-Score) in your purchase decisions for food and beverages today?
n = 1,300

⁷ "Top Trends Shaping Consumer Health into 2026", Euromonitor

I Dietary supplement consumption in the past year [% of respondents]

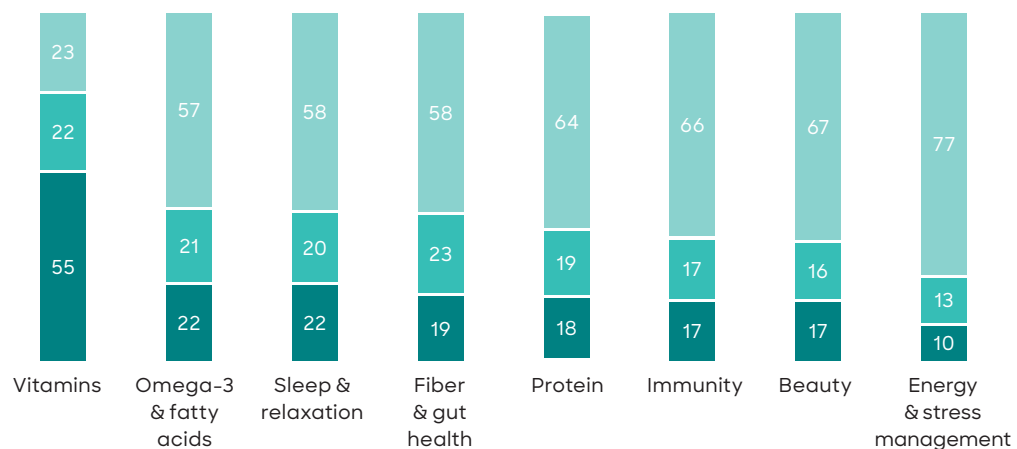
"Among the supplements you have consumed at least once over the past 12 months, for which has your consumption increased during the same period?"

n = 1300

Share of users who increased consumption [%]



"What dietary supplements have you used at least once over the past 12 months?"



■ Daily, almost daily, or a few times per week ■ A few times per month or year ■ Never

Source: Roland Berger

Vitamins lead by a wide margin: 55 % of respondents use them at least a few times a week, and 38 % of these users report increasing their intake in the past year. The reasons for this large adoption are structural: vitamins are the cheapest, most familiar entry point, reinforced by longstanding government recommendations and well-documented seasonal deficiencies, such as vitamin D in the winter. ► |

Omega-3 and sleep and relaxation follow as the second and third most consumed categories, each with a 22 % weekly use rate. Omega-3 benefits from many of the same structural drivers as vitamins: broad demographic appeal and well-established, widely recognized health benefits,⁸ reinforced by the fact that recommended levels of omega-3 are rarely achieved through diet alone. Sleep and relaxation is the more dynamic of the two categories, riding a consumer megatrend around recovery and stress management, with magnesium emerging as one of the category's primary drivers.

8 "Ik wil of kan geen vis eten, kan ik vis vervangen?", Voedingscentrum Nederland

9 "Back to the Roots: Safety and Tolerability of Standardised Ashwagandha", Coope et al., 2026

Beyond the top three, adoption thins gradually, and for structural reasons. Protein, fiber and gut health, and immunity needs are largely met by functional foods before consumers reach for a supplement. Several categories, such as immunity and energy and stress, are also seasonal or reactive rather than habitual, limiting repeat demand. Others serve narrow audiences: protein skews toward younger men and gym fanatics, and beauty supplements toward women at premium price points. Energy and stress management sits at the bottom, likely because the evidence for the effectiveness of supplements like ashwagandha is still limited.⁹

There remains a clear gap between the hype around supplements and actual usage. For example, protein, fiber and gut health, and beauty supplements attract significant attention, yet fewer than 20 % of respondents report daily use. In many cases, everyday food products already meet the underlying need: a high-protein yogurt, fiber-enriched snack, or collagen-infused product can deliver the desired benefit without requiring a separate supplement. This creates a clear opportunity for F&B players to embed functional ingredients into everyday products and capture health-oriented demand within the core basket.

// In a market where consumers are constantly reassessing their baskets, relevance has become the ultimate competitive advantage. The winners of the next decade will not be those with the strongest brands alone, but those that consistently innovate to increase consumer delight."

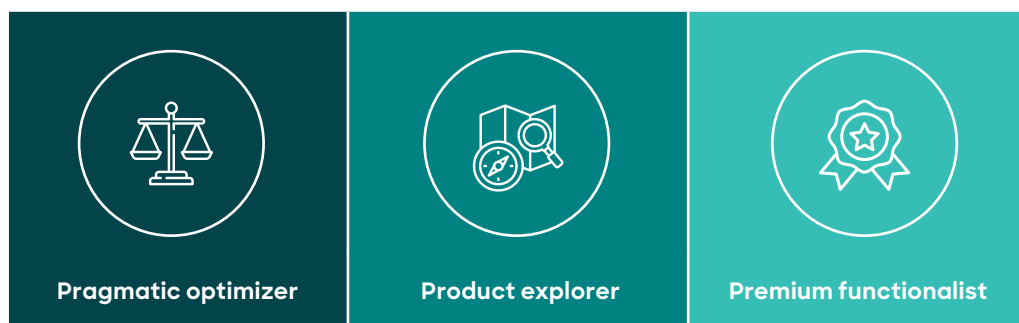
Alexander Belderok, Senior Partner

5

Is it relevant for me?

As consumers reassess what earns a place in the basket, it is increasingly clear that there is no single Dutch consumer to target. Needs, priorities and willingness to pay are fragmenting across age, income, lifestyle and health orientation. Younger consumers are more open to experimentation, higher-income consumers place greater emphasis on health and functionality, and emerging groups such as GLP-1 users already show distinct consumption patterns. Relevance therefore depends on understanding which demand profile a proposition is built to serve.

For market players, this marks a shift in how growth must be pursued. The winning approach is no longer to average out consumer preferences, but to define precisely which consumer to serve and build propositions around that profile's specific trade-offs. In the Dutch market, three demand profiles illustrate this new reality: the pragmatic optimizer, the product explorer and the premium functionalist.



5.1/ Pragmatic optimizer

The pragmatic optimizer seeks the best balance between quality and value. This demand profile typically skews toward lower-income consumers, who place relatively greater emphasis on price and taste than on other purchasing criteria. Among lower-income consumers, 86 % cite price and 78 % cite taste in their top three, compared with the respective 77 % and 73 % averages. Other criteria consequently play a less important role. ► **F**

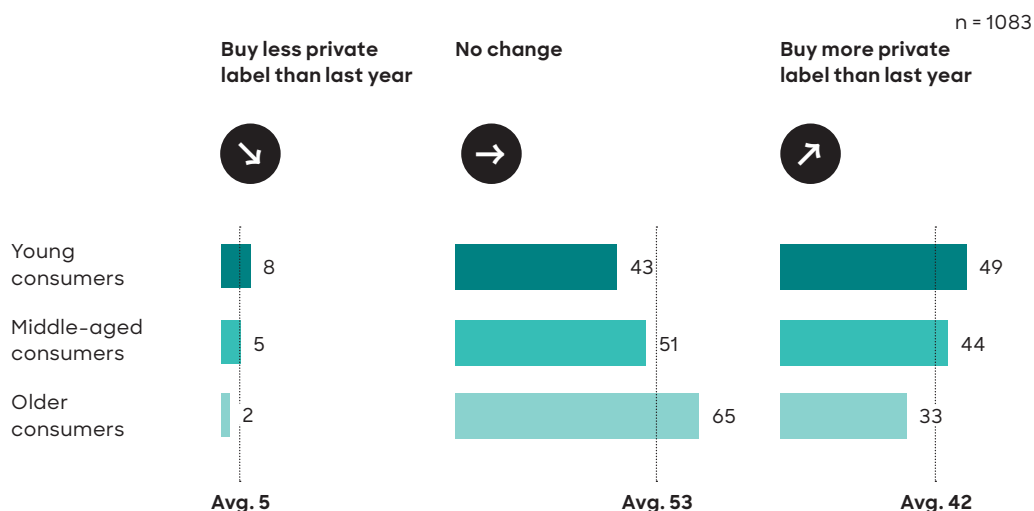
The pragmatic optimizer also readily switches between brands and private label when the proposition improves. These consumers are typically younger and are increasingly purchasing private label products. Specifically, 49 % of young consumers have increased their private label purchases compared to 42 % on average. ► **J**

The driver behind buying more private label is, above all, price. Nearly two-thirds of those who made the switch cite high brand prices as the main reason. Yet the story does not end at affordability. Quality perception is shifting in private label's favor and reinforcing the switch: around a third of those who increased private label purchases cite quality as good or sufficient for their needs. For the pragmatic optimizer who values both price and quality, this is a clear reason to favor private label over brands. ► **K**

J Change in consumption frequency of private label products for private label consumers in the past year [% of respondents]



"Since you indicated that you have mostly consumed private label products or a mix of branded and private label products, compared to your purchases in 2024, how has your purchase of private label products changed this year?"

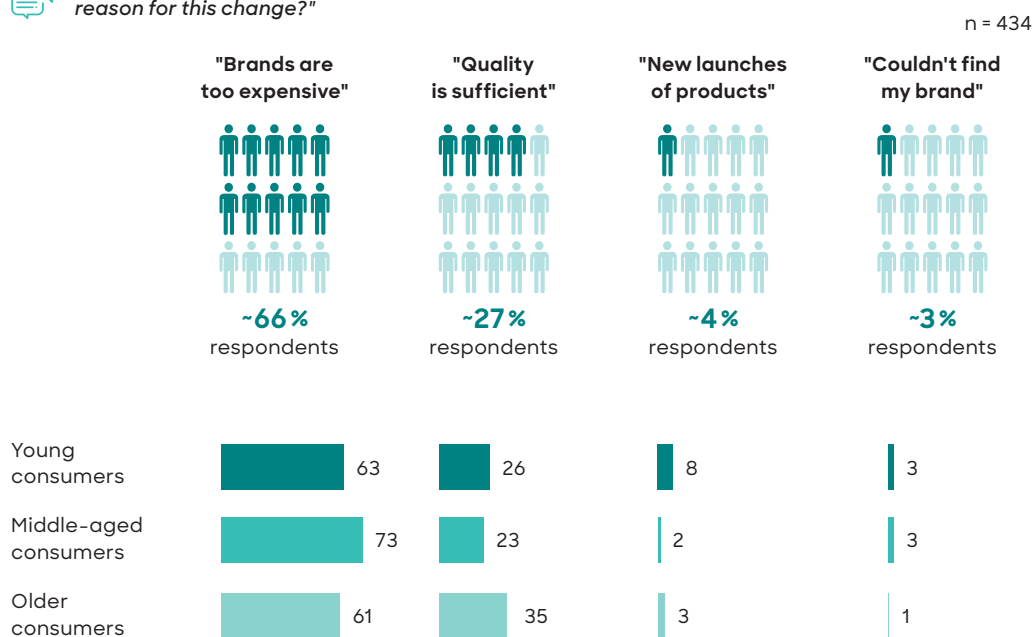


Source: Roland Berger

K Main reasons for increase in private label consumption for private label users [% of respondents]



"Since you indicated that you have bought more private label products this year, what is the main reason for this change?"



Source: Roland Berger

5.2/ Product explorer

The product explorer actively experiments with new products, categories and consumption habits. The survey indicates that younger consumers are more willing to experiment than other age groups, for instance shown by their tendency to experiment with alternative proteins. ► C

10 "Trust Report 2026:
Trust in innovation:
Between familiarity and
fear", EIT Food

These findings are supported by other data showing that younger consumers are more open to food innovation.¹⁰ Young consumers also hold the most diversified baskets, buying products from on average 96 % of indicated product categories, compared to older consumers buying 86 % of the categories. They are particularly frequent buyers of UPF: 53 % report weekly consumption, compared with 39 % of older consumers.

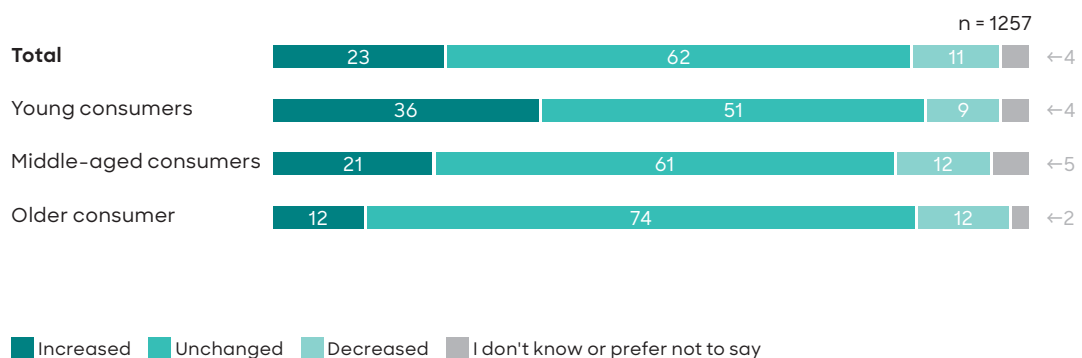
The habits of young consumers are also more dynamic: 36 % report having increased their UPF consumption frequency in the past year, compared with 12 % of older consumers. This makes younger consumers an important engine of category disruption, accelerating shifts in consumption patterns and driving adoption of emerging propositions. ► L

Additionally, while awareness and scepticism around UPF may be increasing, it has not yet materially altered consumer behavior. Across age groups, only 10 % of consumers report decreased consumption of UPF, but more than 20 % report increased consumption. Concerns around UPF have not yet translated into widespread changes in purchasing behaviour – in fact, several consumers also report an increase in consumption of UPF.

One of the key factors behind younger consumers' higher willingness to experiment is their strong engagement with social media. Platforms such as TikTok are increasingly shaping product discovery, accelerating awareness and lowering barriers to trial. As a result, product adoption is becoming less dependent on traditional marketing channels and more influenced by digital communities, peer recommendations, and viral trends.

L Change in consumption frequency of ultra-processed foods [% of respondents]

 "Has your consumption of at least one of the product categories in the basket changed over the past 12 months?"



Source: Roland Berger

This dynamic creates a structural advantage for challenger brands. Social media allows them to build awareness, credibility and engagement at a fraction of the scale historically required, enabling faster market penetration. Established brands and retailers can no longer rely on incumbent market position alone. Reaching the product explorer requires a strong presence in the digital ecosystems where purchasing decisions are shaped and new consumption trends emerge.

5.3/ Premium functionalist

The premium functionalist prioritizes health, wellbeing and functionality, and is willing to pay for products that deliver tangible benefits. This demand profile is more demographically diverse than the other demand profiles. While health is a universal priority, its meaning varies significantly by consumer group. Higher-income consumers are significantly more health-driven, with 32% ranking natural ingredients and 34% ranking health benefits in their top three versus 25% and 19% of lower-income respondents. Health-oriented food choices carry a persistent price premium, making income a structural enabler of a more health-conscious basket, a well-documented dynamic the survey data confirms. ►E

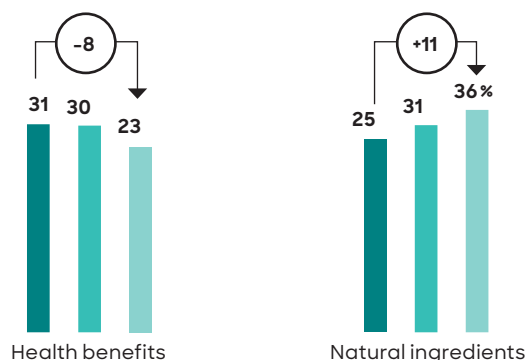
Where it gets more interesting is across generations. Younger consumers prioritize health benefits: 31% rank them in their top-three purchasing criteria, versus 23% of older consumers. Older consumers are not less health-conscious, they simply define health differently. For them, health is about what is on the label – real, recognizable ingredients: 36% rank natural ingredients in their top three, versus just 25% of younger respondents. Where younger consumers seek out products with functional health benefits (e.g. added protein), older consumers focus heavily on avoiding harmful or artificial ingredients. Health sells most effectively when it is translated into the priorities consumers actually value. By tailoring health messaging to specific generational and income segments, brands can turn broad consumer interest in health into concrete basket wins. ►M

M Health-related purchasing criteria by age [% of respondents]



"What are the most important criteria when purchasing food and beverages today?"

n = 1300



■ Young consumers ■ Middle-aged consumers ■ Older consumers

Source: Roland Berger

GLP-1 users may be an early indicator of future consumer behavior

GLP-1 and other weight management drug users represent a small, but rapidly growing segment of the Dutch consumer landscape, one whose food and beverage implications are already outpacing its current user numbers. While only 5% of respondents are currently using GLP-1 or other weight management drugs, 8% have used them in the past, and another 11% plan to start in the future. This picture is reinforced by prescription data: reimbursed GLP-1 use in the Netherlands grew 57% in a single year, reaching 262,000 users in 2025, excluding self-payers.¹¹ ► ○

Among current users, purchasing behavior shifts visibly. Price and taste become less important, while discount level and brand name gain weight, creating a premium-but-opportunistic consumer who actively seeks higher-value products while still hunting for deals. Clinical research, including two Dutch studies, consistently finds food intake falling 16–24% following GLP-1 initiation as appetite diminishes.¹²⁺¹³ Consumer spending also decreases: a US study found grocery spend down 5% and fast food down 8% after six months, while a Danish study found annual food spend declining 33%.¹⁴⁺¹⁵

However, 57% of GLP-using survey respondents indicate an increase in perceived monthly food expenses. Two dynamics might explain this. First, genuine substitution: as volume falls,

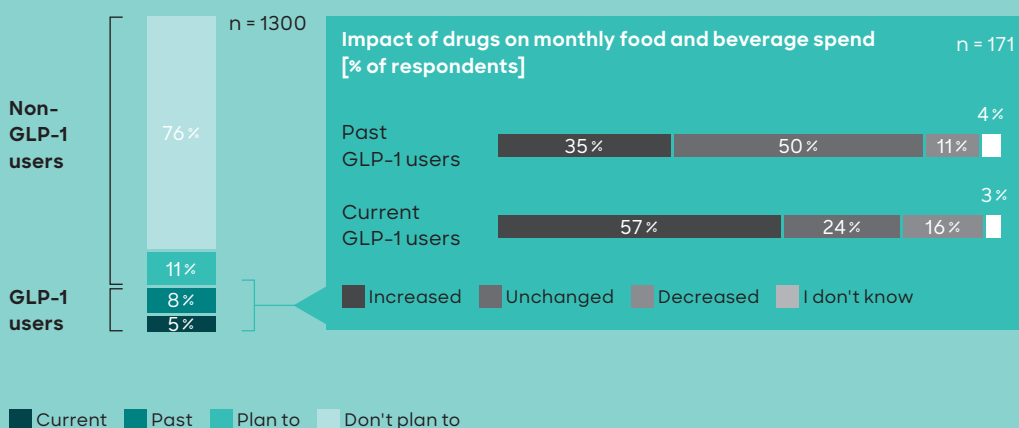
○ Use of GLP-1 and similar drugs in the past year and their impact on grocery spending [% of respondents]



"In the past 12 months, have you used GLP-1 or other weight management drugs, or are you planning to in the future?"



"Has your past or current use of GLP-1 or other weight management drugs had an impact on your monthly spending on food and beverages?"



Source: Roland Berger

users shift toward nutrient-dense, premium food products, where a higher price per unit partially offsets the reduction in quantity purchased. Second, recall bias: when consumers feel they are eating more intentionally, they tend to perceive their spending as higher, even when objective spending data says otherwise. GLP-1 use affects not only food and beverages, but also dietary supplement consumption. This is highest among current GLP-1 users, followed by past GLP-1 users. Fewer than 20% of non-GLP-1 users use dietary supplements other than vitamins, compared to more than 30% for GLP-1 users, further highlighting the health orientation of this group. ► P

Understanding how GLP-1 use affects consumer behavior is critical for F&B players as GLP-1 adoption rapidly accelerates in Europe and the Netherlands. The more mature US market provides insights into what may lie ahead. In the US, GLP-1 prescriptions for obesity increased more than fivefold between 2019 and 2024.¹⁶ Today, 12% of US adults use GLP-1 drugs,¹⁷ and the user base is expected to triple by 2030. This large-scale adoption is expected to strongly impact grocery spending. The product categories expected to decrease most in volume are chips and savory snacks (-11%), sweet bakery items (-9%) and soft drinks (-7%).

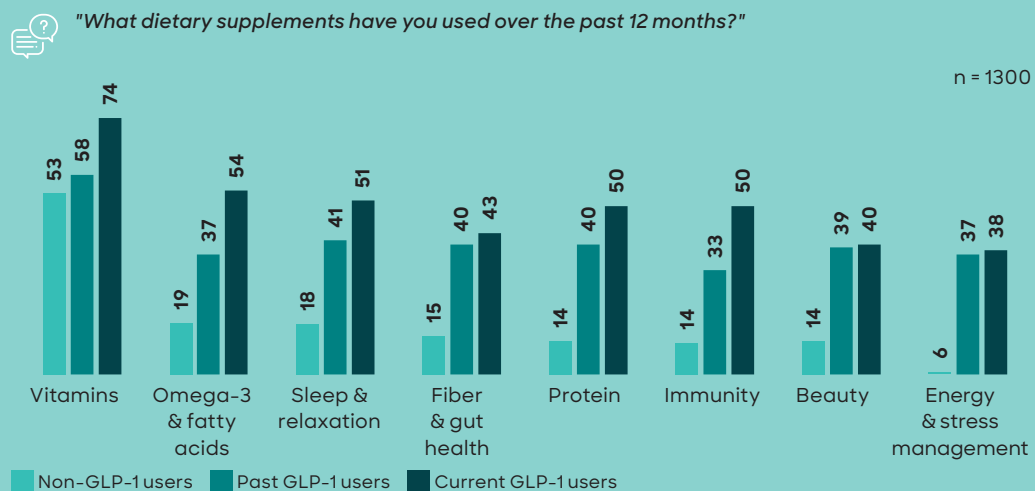
The dynamics in the US highlight the potential impact of GLP-1 adoption on consumer behavior, and similar dynamics may emerge in the Netherlands. With more than half of Dutch adults living with obesity in 2025¹⁸ and GLP-1 drugs proving effective in treating it, usage is likely to increase further. The survey data points to GLP-1 users exhibiting a distinct, premium-focused consumption pattern, characterized by lower volumes and more health-oriented category choices. For F&B players, this creates an opportunity to capture demand through targeted product innovation and premium positioning. Nevertheless, two key questions remain: how large will the impact of GLP-1 drugs on grocery spending ultimately be, and how to innovate and win in the additional demand spaces unlocked due to changes in consumption.

16 "Use of GLP-1 Drugs to Treat Overweight or Obesity Increased 587 Percent from 2019 to 2024, According to New FAIR Health Study", FAIRHealth

17 "Poll: 1 in 8 Adults Say They Are Currently Taking a GLP-1 Drug for Weight Loss, Diabetes or Another Condition, Even as Half Say the Drugs Are Difficult to Afford", KFF

18 "Overgewicht volwassenen", CBS

P Use of GLP-1 and similar drugs' impact on weekly dietary supplement consumption in the past year [% of respondents]



Source: Roland Berger

6

Conclusion

Taken together, the survey findings suggest that the Dutch F&B market is entering a fundamentally different competitive era. Consumers are more willing than ever to switch, experiment and reassess purchasing decisions. No position in the basket can therefore be taken for granted.

Since Dutch consumers value price and taste above everything else, F&B players should ensure in the first place that these priorities are reflected in the product portfolio. In addition, the product portfolios should include products that have proven health benefits, for instance through functional ingredients. But F&B players need to realize that there is no such thing as the typical Dutch consumer – to gain basket share, companies need to target specific demand profiles with products that match specific needs.

How can F&B companies develop a winning portfolio which finds and retains its place in the consumer basket? Companies should focus on three strategic priorities:

1

Targeted demand spaces

Identify the most relevant consumer groups to serve, understand the specific trade-offs those consumers make, and build portfolios around those needs.

2

Innovation

Circumvent the consumer trade-offs by innovating products that are healthier, more sustainable and more functional without sacrificing taste or affordability.

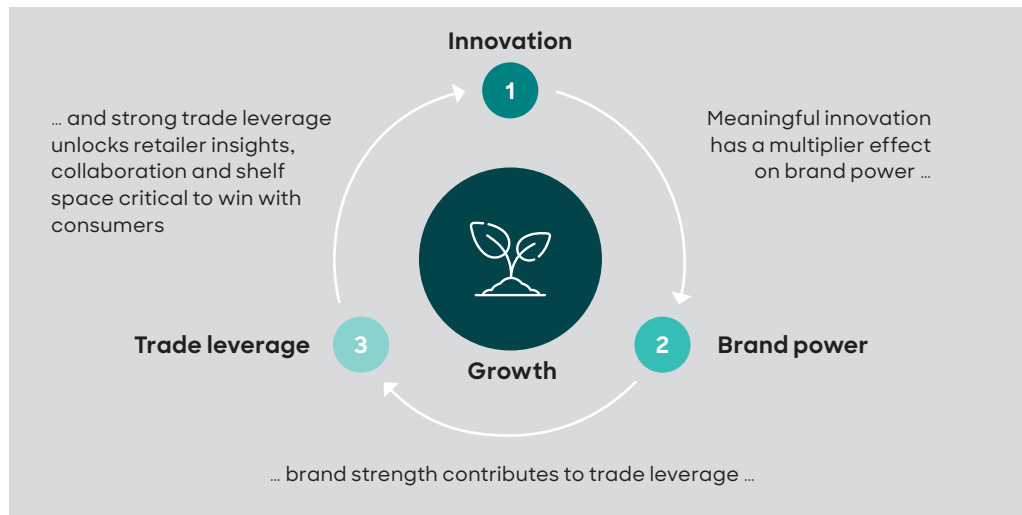
3

Continuously enhancing shelf relevance

Once established, relevance cannot be maintained indefinitely. Revenue growth levers that shape purchasing decisions must be continuously optimized, including portfolio architecture, pricing, promotions, and channel execution.

The objective is not simply to protect market share, but to ensure that each product continues to earn its place in the basket as consumer preferences and competitive dynamics evolve.

Together, these strategic priorities work as a **growth flywheel**: targeted and meaningful innovation strengthens brand power; stronger brand power and revenue growth management improve trade leverage; and closer retailer collaboration generates the insights and access needed to continuously fuel the next innovation cycle.



Winners in this market will be those that understand the consumer who is continuously reassessing what deserves a place in the basket. They know the answers to the three questions shaping purchasing decisions – is it worth it, is it good for me, and is it relevant for me – and translate those answers into targeted innovation, stronger brand power and greater trade leverage. This is what keeps the growth flywheel turning.

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