

YouGov®

The Netherlands

# Setting the scene

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Living consumer intelligence | [yougov.com/business](https://yougov.com/business)

**Yes,  
indeed!  
We are  
YouGov !**



# 70 years of consumer & shopper understanding!



# YouGov®

...is the most quoted market research agency worldwide!

... is market leader in consumer opinions, motivations, wants, and media habits, bringing a history of tech innovation and a deep understanding of more than 26 million registered panel members.

... turns living data into business intelligence.

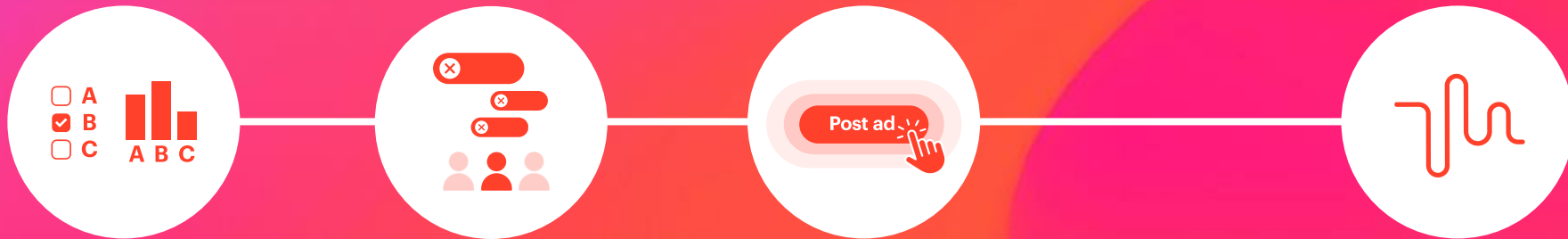


**We enhance consumer and shopper insights**

**We bridge opinion and  
behavior data**

**We know what the world thinks, wants,  
and buys!**

**We help the world's most recognized FMCG brands, media owners and agencies to**



**explore, plan, activate and track**  
**better marketing, trade**  
**marketing and sales activities**

**“It is not the strongest of the species that survives, not the most intelligent that survives. It is the one that is the most adaptable to change.”**

**- *Charles Darwin***



**Change,  
the  
essence  
of  
growth!**



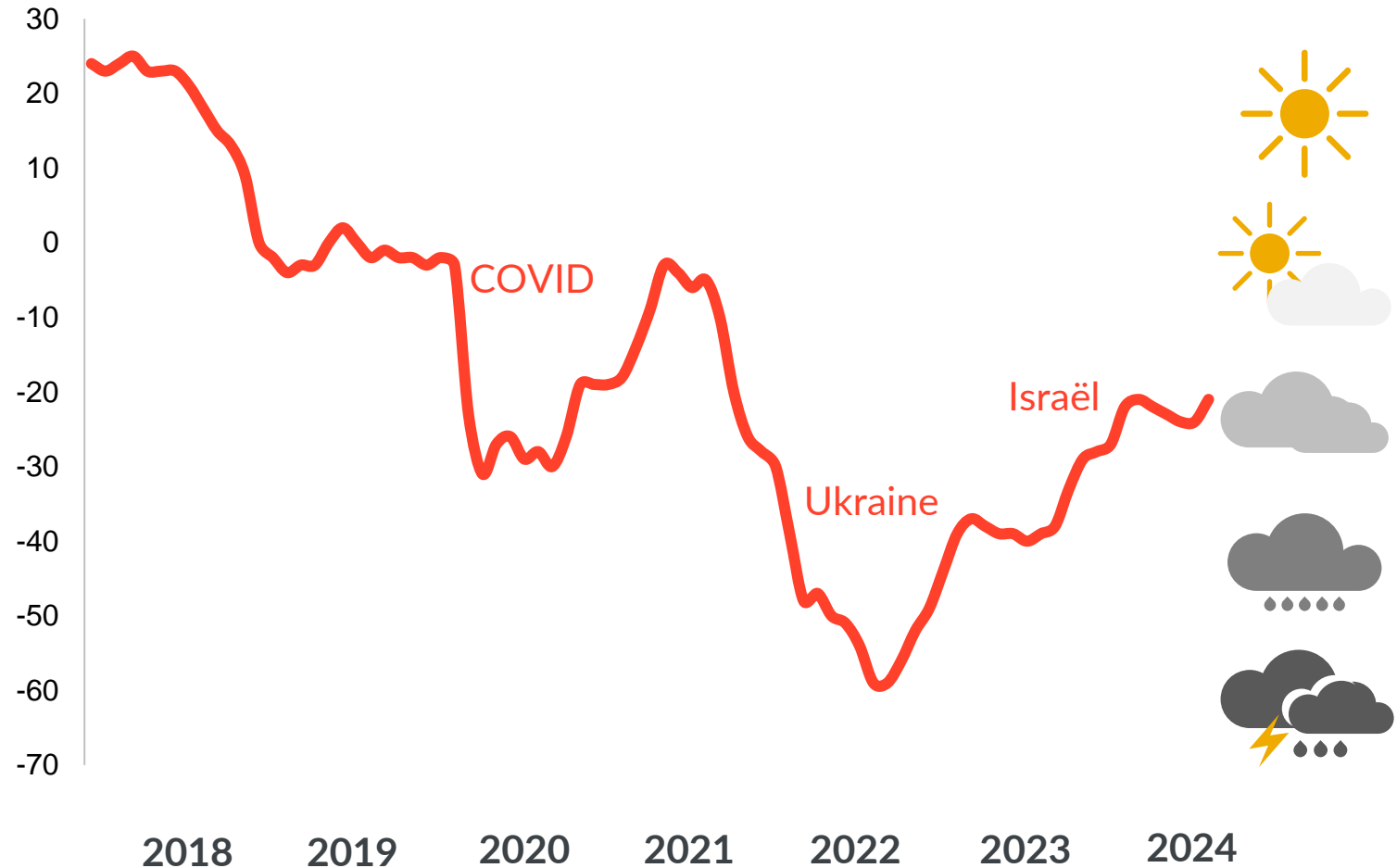
A person with curly hair is wearing a VR headset and a black leather jacket. They are holding the headset with both hands. The scene is lit with vibrant red and blue neon lights, creating a futuristic atmosphere. The background is a textured, light-colored wall.

**What  
does  
today's  
market  
look  
like?**

# Consumer confidence in NL is step by step recovering after a steep decline



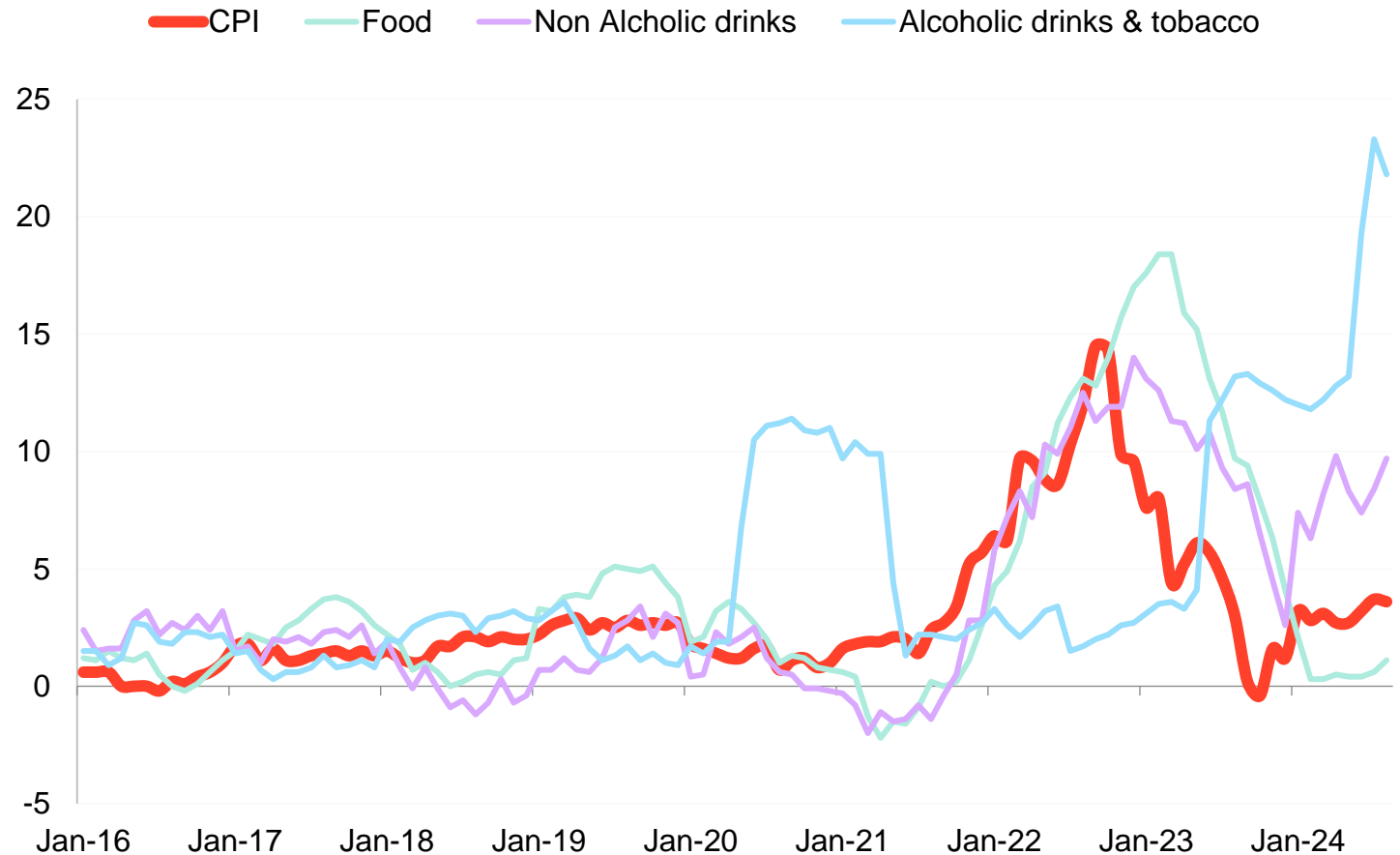
## Consumer confidence in The Netherlands



# Overall inflation stabilized around 3% in 2024

Food inflation went down to almost zero. Alcoholic drinks and tobacco however went up very strong in 2024

## Consumer Price Index in The Netherlands



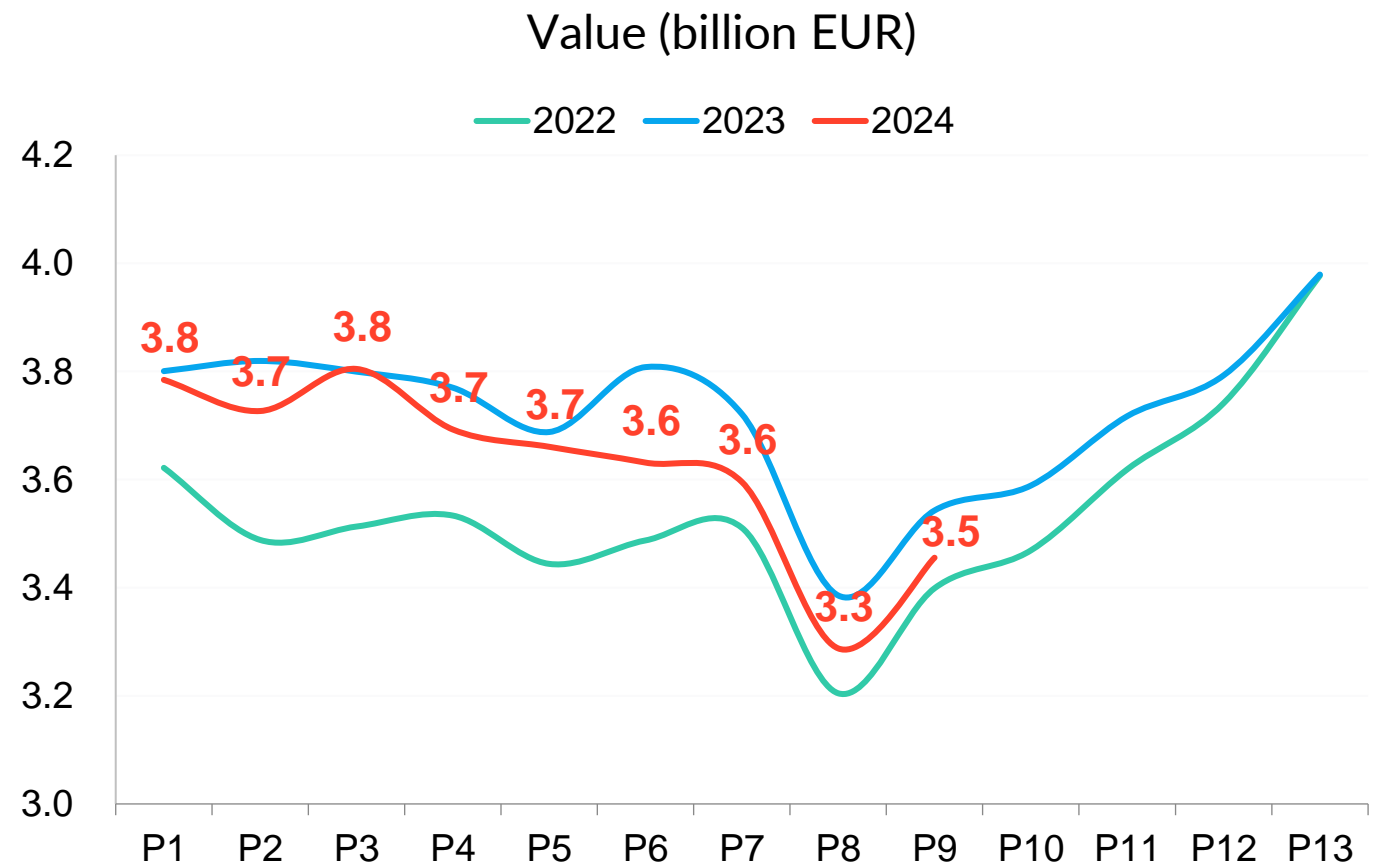
# The FMCG market is under pressure

Value growth vs year ago (%)



Source: YouGov Consumer Panel – The Netherlands

## Total FMCG & Fresh development in The Netherlands – P9 2024



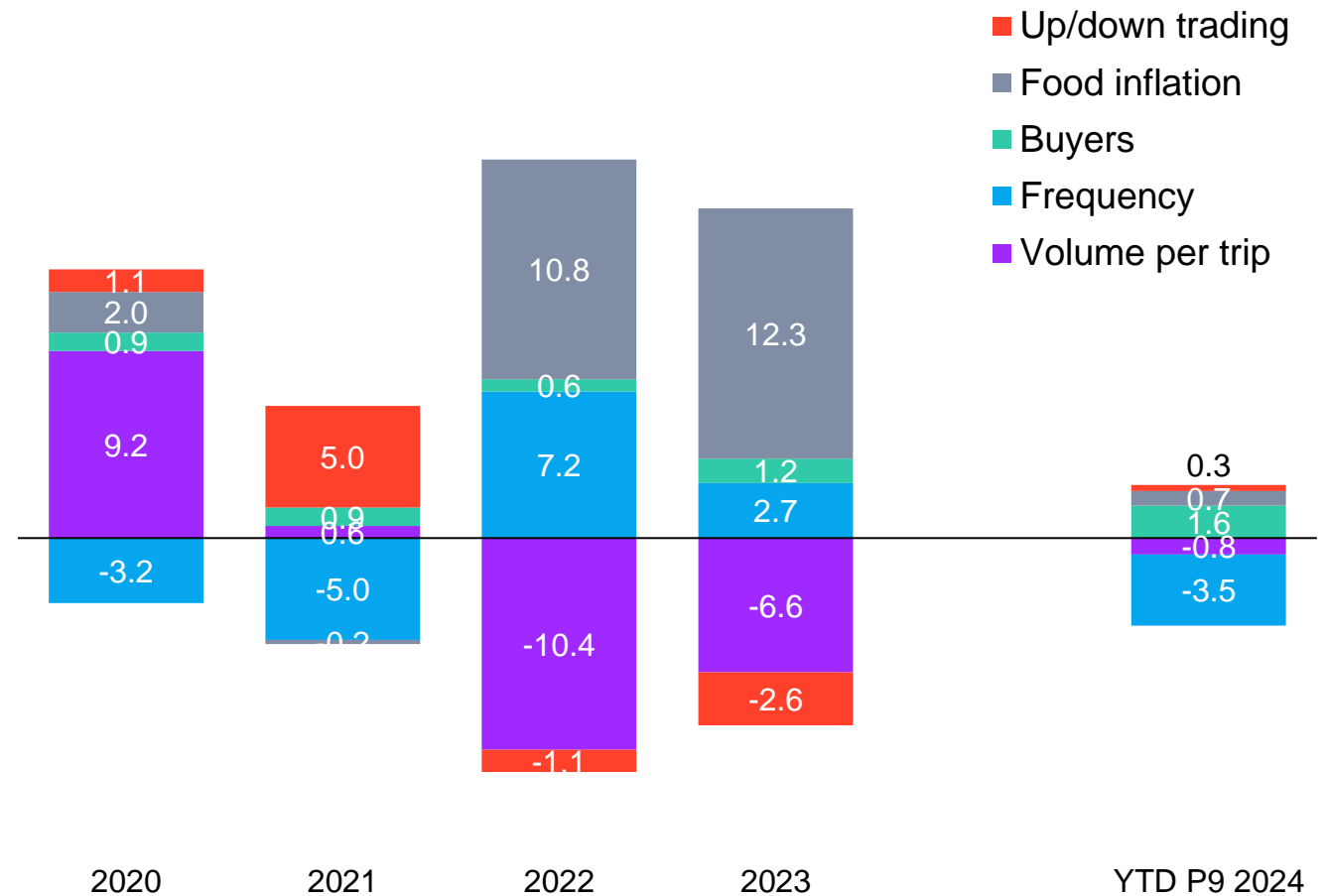
Source: YouGov Consumer Panel – The Netherlands

# The decline in value is mainly driven by a pressure upon purchase frequency

Next to frequency, also the volume per trip is going down slightly

Impact of Food inflation came to an end

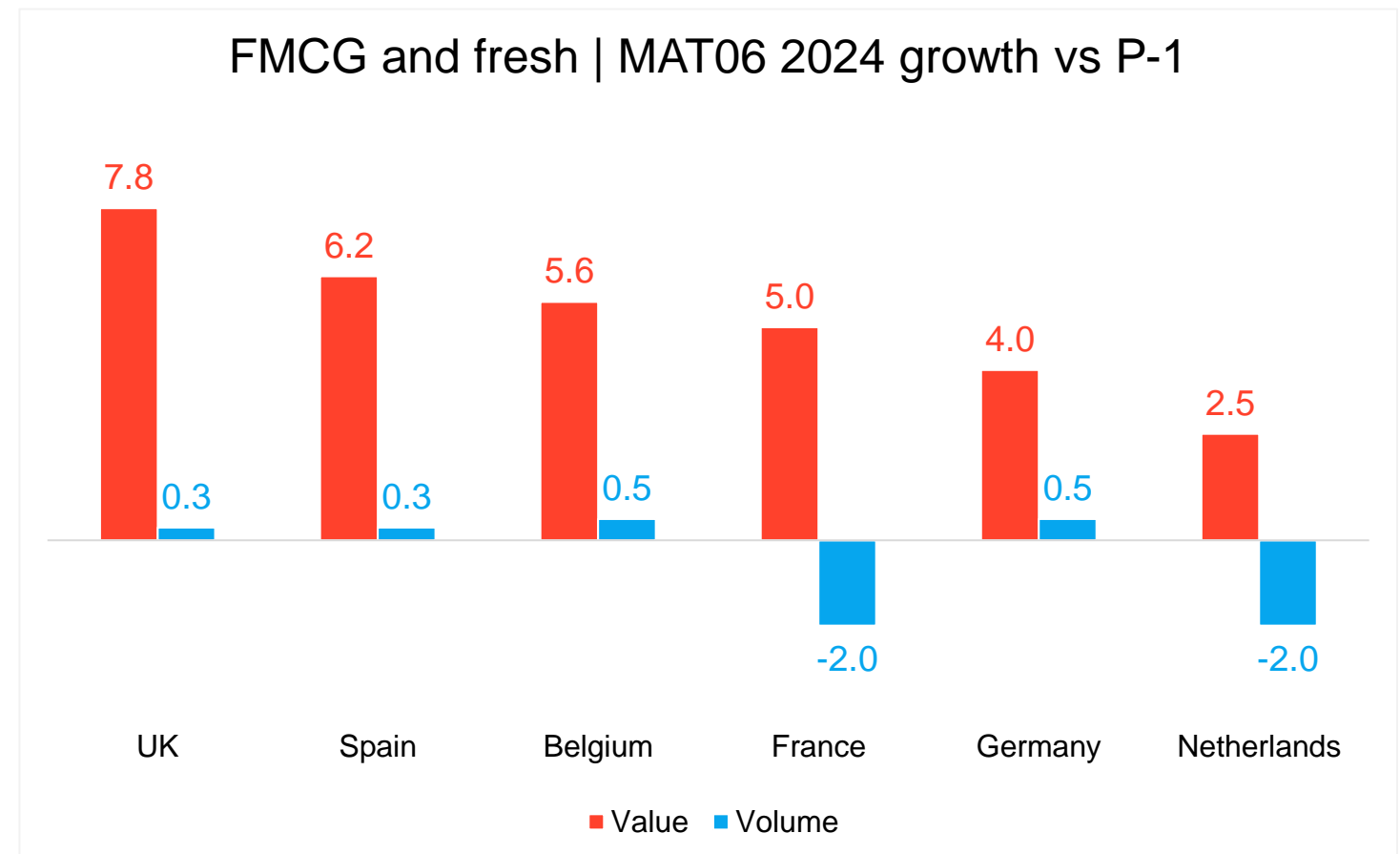
## Total FMCG & Fresh development in The Netherlands – YTD P9 2024



# The Netherlands is lagging behind vs other EU countries

Only France and NL are facing a volume decline in MAT 06 2024. All other countries are catching up with limited volume increases

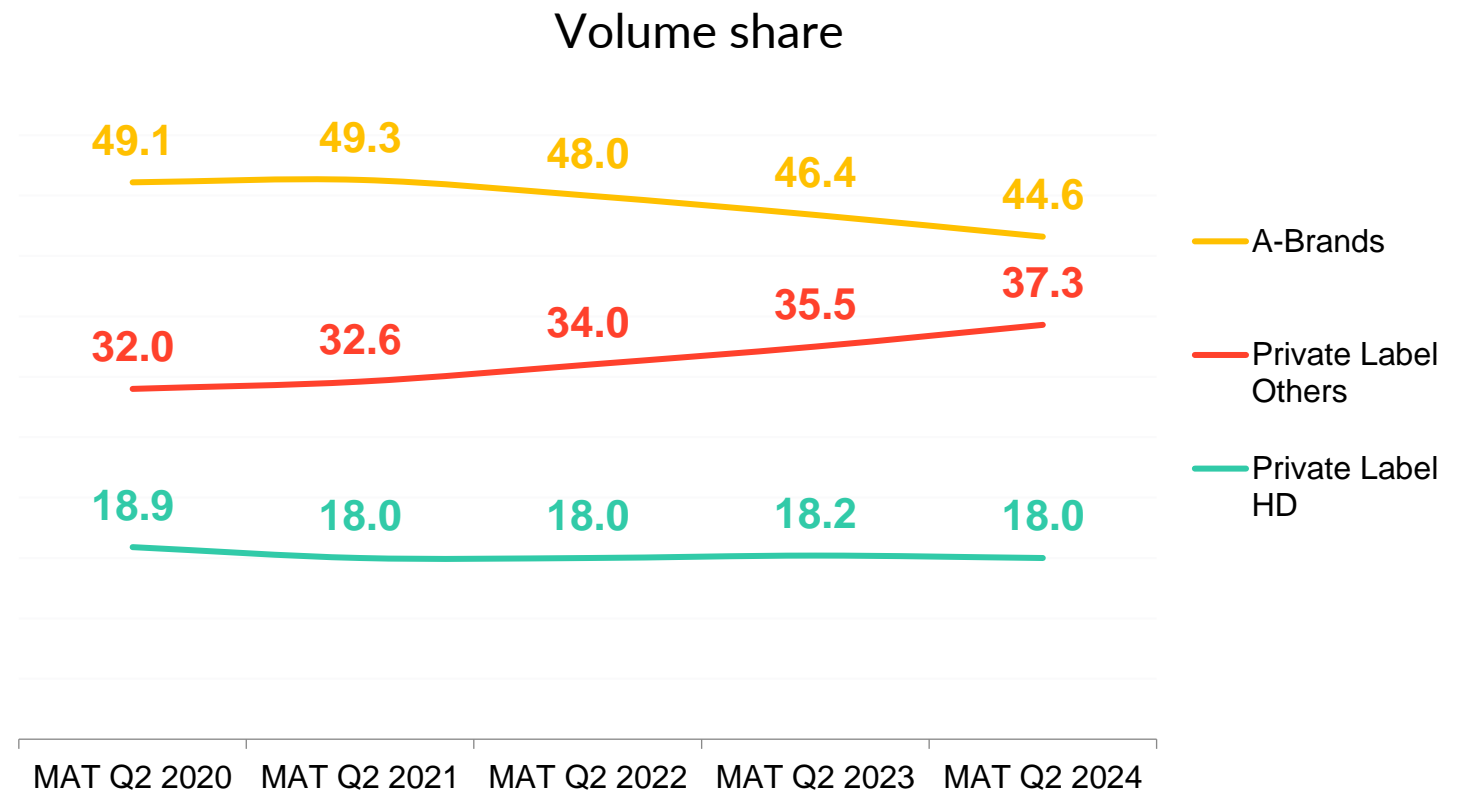
## Total FMCG & Fresh development in The Netherlands – MAT June 2024



# A-brands still feel the pressure from Private Label

This pressure is mainly coming from Private Label outside of Hard Discount

## Volume share development of A-brands and private label in The Netherlands



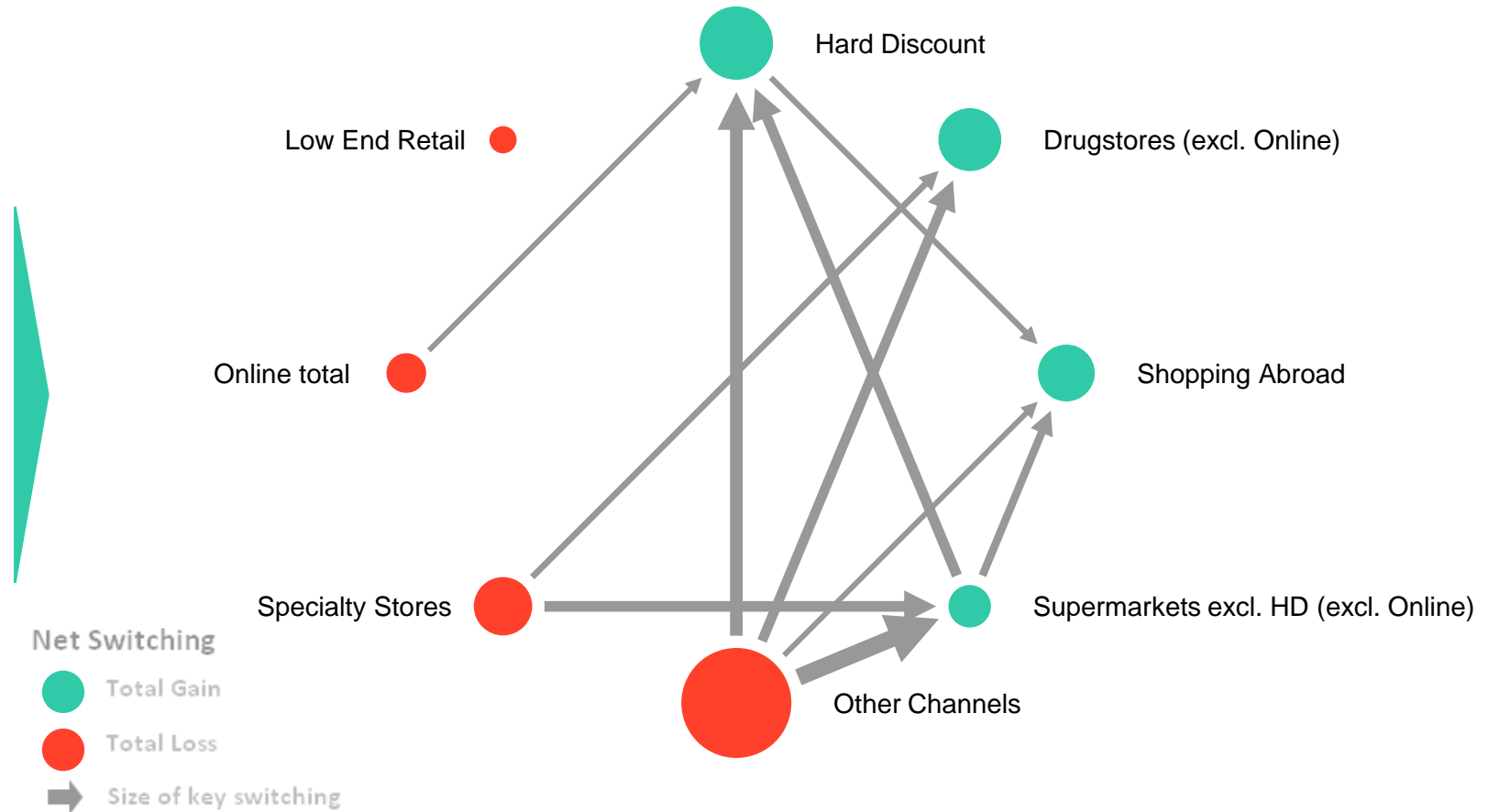
# Competitive switching in NL remains limited

■ Intensity Change ■ Competitive Switching



Source: YouGov Consumer Panel – The Netherlands

## Total FMCG (incl. Fresh) development in The Netherlands Channel switching | Value | YTD P9 2024 vs. YA



Source: YouGov Consumer Panel – The Netherlands



# In a nutshell ...

- **Start looking for YouGov ...**
- **Consumer confidence and (past) inflation keep having an impact on the overall purchase behavior**
- **Contraction of the Dutch market is driven by a declining purchase frequency**
- **A-brands continue to lose traction**
- **Traditional supermarkets, Hard Discount & drugstores take market share away from smaller players**