



# Concentrates in the Netherlands

November 2025

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## Concentrates in the Netherlands - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Concentrates appeals to budget-conscious consumers

#### INDUSTRY PERFORMANCE

Concentrates still seen as offering value for money

Liquid concentrates benefits from home carbonation

#### WHAT'S NEXT?

Maturity of liquid concentrates will limit volume growth

More opportunities for distribution through discounters

Development of new reduced sugar concentrates could be an opportunity to attract new consumers

#### COMPETITIVE LANDSCAPE

Consumers switch to Raak because of its affordability

D-Drinks appeals to health-conscious consumers

#### CHANNELS

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Soft drinks seeing an upturn

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Weather conditions boost demand, but price rises constrain growth

Shift towards healthier products and marketing tie-ins

## WHAT'S NEXT?

Manufacturers need to focus on value

Health and wellness to remain key

Red Bull challenging Coca-Cola for top spot

## COMPETITIVE LANDSCAPE

Coca-Cola holds presence across soft drinks

Smaller local companies benefit from clean, modern design and transparency

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