

Retail in the Netherlands

March 2024

Table of Contents

Retail in the Netherlands

EXECUTIVE SUMMARY

Retail in 2023: The big picture Renewed interest in physical retail threatened by staffing problems Reduction in number of outlets What next for retail?

OPERATING ENVIRONMENT

Informal retail Opening hours for physical retail Summary 1 - Standard Opening Hours by Channel Type 2023 Seasonality Sinterklaas (St Nicholas) Christmas Winter sales Summer sales

MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023 Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023 Table 3 - Sales in Retail Offline by Channel: Value 2018-2023 Table 4 - Sales in Retail Offline by Channel: % Value Growth 2018-2023 Table 5 - Retail Offline Outlets by Channel: Units 2018-2023 Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2018-2023 Table 7 - Sales in Retail E-Commerce by Product: Value 2018-2023 Table 8 - Sales in Retail E-Commerce by Product: % Value Growth 2018-2023 Table 9 - Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023 Table 10 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023 Table 11 - Sales in Grocery Retailers by Channel: Value 2018-2023 Table 12 - Sales in Grocery Retailers by Channel: % Value Growth 2018-2023 Table 13 - Grocery Retailers Outlets by Channel: Units 2018-2023 Table 14 - Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023 Table 15 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023 Table 16 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023 Table 17 - Sales in Non-Grocery Retailers by Channel: Value 2018-2023 Table 18 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023 Table 19 - Non-Grocery Retailers Outlets by Channel: Units 2018-2023 Table 20 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023 Table 21 - Retail GBO Company Shares: % Value 2019-2023 Table 22 - Retail GBN Brand Shares: % Value 2020-2023 Table 23 - Retail Offline GBO Company Shares: % Value 2019-2023 Table 24 - Retail Offline GBN Brand Shares: % Value 2020-2023 Table 25 - Retail Offline LBN Brand Shares: Outlets 2020-2023 Table 26 - Retail E-Commerce GBO Company Shares: % Value 2019-2023 Table 27 - Retail E-Commerce GBN Brand Shares: % Value 2020-2023 Table 28 - Grocery Retailers GBO Company Shares: % Value 2019-2023 Table 29 - Grocery Retailers GBN Brand Shares: % Value 2020-2023 Table 30 - Grocery Retailers LBN Brand Shares: Outlets 2020-2023 Table 31 - Non-Grocery Retailers GBO Company Shares: % Value 2019-2023 Table 32 - Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023 Table 33 - Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023 Table 34 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028

Table 35 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028 Table 36 - Forecast Sales in Retail Offline by Channel: Value 2023-2028 Table 37 - Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028 Table 38 - Forecast Retail Offline Outlets by Channel: Units 2023-2028 Table 39 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028 Table 40 - Forecast Sales in Retail E-Commerce by Product: Value 2023-2028 Table 41 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028 Table 42 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028 Table 43 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028 Table 44 - Forecast Sales in Grocery Retailers by Channel: Value 2023-2028 Table 45 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028 Table 46 - Forecast Grocery Retailers Outlets by Channel: Units 2023-2028 Table 47 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028 Table 48 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028 Table 49 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028 Table 50 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028 Table 51 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028 Table 52 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028 Table 53 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Convenience Retailers in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

City centre and train station locations prove fruitful for convenience stores Sustainability comes into focus with AH To Go experimenting with true pricing Spar introduces new innovations as it looks to expand within a saturated market

PROSPECTS AND OPPORTUNITIES

Increasingly saturated market could limit opportunities for new outlets Competition between convenience retail and foodservice will likely increase Spar focusing on positioning itself as the King of Convenience

CHANNEL DATA

- Table 54 Convenience Retailers: Value Sales, Outlets and Selling Space 2018-2023
- Table 55 Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 56 Sales in Convenience Retailers by Channel: Value 2018-2023
- Table 57 Sales in Convenience Retailers by Channel: % Value Growth 2018-2023
- Table 58 Convenience Retailers GBO Company Shares: % Value 2019-2023
- Table 59 Convenience Retailers GBN Brand Shares: % Value 2020-2023
- Table 60 Convenience Retailers LBN Brand Shares: Outlets 2020-2023
- Table 61 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 62 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 63 Forecast Sales in Convenience Retailers by Channel: Value 2023-2028
- Table 64 Forecast Sales in Convenience Retailers by Channel: % Value Growth 2023-2028

Supermarkets in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Players focus on merger and acquisition activity to achieve economies of scale Increase in promotions as shoppers increasingly attracted to the best deals Supermarkets focus on improving the customer experience as they look to differentiate from the competition

PROSPECTS AND OPPORTUNITIES

Supermarkets taking different approaches to establishing customer loyalty Supermarkets focused more on omnichannel retailing and increasing customer loyalty Innovation likely to increase with Al-enabled solutions set to be introduced

CHANNEL DATA

Table 65 - Supermarkets: Value Sales, Outlets and Selling Space 2018-2023Table 66 - Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023Table 67 - Supermarkets GBO Company Shares: % Value 2019-2023Table 68 - Supermarkets GBN Brand Shares: % Value 2020-2023Table 69 - Supermarkets LBN Brand Shares: Outlets 2020-2023Table 70 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028Table 71 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Hypermarkets in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hypermarkets benefit from lack of queues and wide offer Premium subscriptions boost customer loyalty Retailers focus on sustainability

PROSPECTS AND OPPORTUNITIES

Organic products could help hypermarkets to stand out from the competition in the market while sustainability remains a key focus Combination of retail and foodservice to drive growth of hypermarkets Advertising could become a new revenue source for hypermarkets

CHANNEL DATA

Table 72 - Hypermarkets: Value Sales, Outlets and Selling Space 2018-2023
Table 73 - Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 74 - Hypermarkets GBO Company Shares: % Value 2019-2023
Table 75 - Hypermarkets GBN Brand Shares: % Value 2020-2023
Table 76 - Hypermarkets LBN Brand Shares: Outlets 2020-2023
Table 77 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 78 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Discounters in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Discounters benefit from challenging economic situation in the Netherlands Discounters responding to higher prices through promotions on non-grocery items Lidl dominates while Aldi focuses on recruitment

PROSPECTS AND OPPORTUNITIES

Continued economic uncertainty likely to boost the growth of discounters but the channel could face stiffer competition from supermarkets and hypermarkets

Discounters may need to innovate and adapt to changes in market demand

Increased promotional action likely to continue while sustainability remains at the forefront of Aldi and Lidl's strategies

CHANNEL DATA

Table 79 - Discounters: Value Sales, Outlets and Selling Space 2018-2023
Table 80 - Discounters: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 81 - Discounters GBO Company Shares: % Value 2019-2023
Table 82 - Discounters GBN Brand Shares: % Value 2020-2023
Table 83 - Discounters LBN Brand Shares: Outlets 2020-2023
Table 84 - Discounters Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 85 - Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Small Local Grocers in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Franchise model proving successful in small local grocers Some players embrace digitalisation while others are lagging behind Organic retailers come under pressure but sustainability efforts boost growth

PROSPECTS AND OPPORTUNITIES

Small local grocers likely to remain threatened by supermarkets/hypermarkets, but niches still offer room for growth Share of independent small local grocers likely to decrease further Sustainability a growing concern for consumers and retailers

CHANNEL DATA

Table 86 - Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023
Table 87 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 88 - Small Local Grocers GBO Company Shares: % Value 2019-2023
Table 89 - Small Local Grocers GBN Brand Shares: % Value 2020-2023
Table 90 - Small Local Grocers LBN Brand Shares: Outlets 2020-2023
Table 91 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 92 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

General Merchandise Stores in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Action continues to thrive thanks to successful discounter strategy Foodservice still seen as important in department stores De Bijenkorf suffering because of decreased demand for luxury goods

PROSPECTS AND OPPORTUNITIES

Hema and other low-priced retailers likely to perform well. Acquisitions likely to boost growth High costs and labour shortages likely to remain significant challenges

CHANNEL DATA

Table 93 - General Merchandise Stores: Value Sales, Outlets and Selling Space 2018-2023
Table 94 - General Merchandise Stores: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 95 - Sales in General Merchandise Stores by Channel: Value 2018-2023
Table 96 - Sales in General Merchandise Stores by Channel: % Value Growth 2018-2023

- Table 97 General Merchandise Stores GBO Company Shares: % Value 2019-2023
- Table 98 General Merchandise Stores GBN Brand Shares: % Value 2020-2023
- Table 99 General Merchandise Stores LBN Brand Shares: Outlets 2020-2023
- Table 100 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 101 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 102 Forecast Sales in General Merchandise Stores by Channel: Value 2023-2028
- Table 103 Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2023-2028

Apparel and Footwear Specialists in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Economic challenges and the rise of the second-hand market puts pressure on sales Some players focus on menswear to boost sales while the major chains continue to take share from smaller players and independents Sustainability a pressing concern with new legislation forcing businesses to better manage their waste

PROSPECTS AND OPPORTUNITIES

Low prices expected to be a key influence on the competitive landscape Retailers looking to improve customer experience. Omnichannel strategy likely to be key to success

CHANNEL DATA

Table 104 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023
Table 105 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 106 - Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023
Table 107 - Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023
Table 108 - Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023
Table 109 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 109 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Appliances and Electronics Specialists in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

BCC declared bankrupt Small franchiser formula works well in a channel dominated by large chains Rising costs making it hard for appliances and electronics specialists to remain competitive

PROSPECTS AND OPPORTUNITIES

Smaller stores in high traffic locations could present new growth opportunities Media Markt set to rollout e-commerce marketplace in 2024 Appliances could be key to growth as housing market recovers

CHANNEL DATA

Table 111 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2018-2023

- Table 112 Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
- Table 113 Appliances and Electronics Specialists GBO Company Shares: % Value 2019-2023

Table 114 - Appliances and Electronics Specialists GBN Brand Shares: % Value 2020-2023

- Table 115 Appliances and Electronics Specialists LBN Brand Shares: Outlets 2020-2023
- Table 116 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 117 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Home Products Specialists in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sustainability a key focus of home products specialists Players focus on supporting consumers in helping to reduce their energy costs lkea promises to lower prices as costs start to stabilise

PROSPECTS AND OPPORTUNITIES

Business models to be adjusted to omnichannel Improving housing market should encourage players to open new outlets Retailers set to focus on the customer experience and education to increase sales

CHANNEL DATA

Table 118 - Home Products Specialists: Value Sales, Outlets and Selling Space 2018-2023
Table 119 - Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 120 - Sales in Home Products Specialists by Channel: Value 2018-2023
Table 121 - Sales in Home Products Specialists by Channel: % Value Growth 2018-2023
Table 122 - Home Products Specialists GBO Company Shares: % Value 2019-2023
Table 123 - Home Products Specialists GBN Brand Shares: % Value 2020-2023
Table 124 - Home Products Specialists LBN Brand Shares: Outlets 2020-2023
Table 125 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 126 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
Table 127 - Forecast Sales in Home Products Specialists by Channel: Value 2023-2028
Table 128 - Forecast Sales in Home Products Specialists by Channel: % Value Growth 2023-2028

Health and Beauty Specialists in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retailers focus on an omnichannel strategy with Kruidvat launching an online marketplace in 2023 Staff shortages and salary increases put pressure on profits Player focus on customer loyalty as demand slows

PROSPECTS AND OPPORTUNITIES

Competitive landscape set to become more consolidated as consumers go in search of the best deals Competition with other channels likely to become more pronounced Ageing population should benefit health and beauty specialists

CHANNEL DATA

Table 129 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2018-2023
Table 130 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 131 - Sales in Health and Beauty Specialists by Channel: Value 2018-2023
Table 132 - Sales in Health and Beauty Specialists by Channel: % Value Growth 2018-2023
Table 133 - Health and Beauty Specialists GBO Company Shares: % Value 2019-2023
Table 134 - Health and Beauty Specialists GBN Brand Shares: % Value 2020-2023
Table 135 - Health and Beauty Specialists LBN Brand Shares: Outlets 2020-2023
Table 136 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 137 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
Table 138 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028
Table 139 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028

Vending in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Grocery retailers enter the vending space Rise in vending at petrol stations and other automotive locations Vending struggling to compete with kiosks and convenience stores

PROSPECTS AND OPPORTUNITIES

Number of vending machines threat to growth Increased interest in health puts negative pressure on food and drink vending Vending machines could be used in response to rising labour costs

CHANNEL DATA

Table 140 - Vending by Product: Value 2018-2023Table 141 - Vending by Product: % Value Growth 2018-2023Table 142 - Vending GBO Company Shares: % Value 2019-2023Table 143 - Vending GBN Brand Shares: % Value 2020-2023Table 144 - Vending Forecasts by Product: Value 2023-2028Table 145 - Vending Forecasts by Product: % Value Growth 2023-2028

Direct Selling in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Market growing again after post covid dip – consumers downtrading Trusted relationships with sellers supports growth especially in health and beauty Face to face meetings still largest, but other channels growing

PROSPECTS AND OPPORTUNITIES

Economic pressures could force consumers to shift to more affordable retail channels Players could struggle to acquire new customers due to competition from e-commerce and online marketplaces Digital tools set to drive growth

CHANNEL DATA

 Table 146 - Direct Selling by Product: Value 2018-2023

Table 147 - Direct Selling by Product: % Value Growth 2018-2023

Table 148 - Direct Selling GBO Company Shares: % Value 2019-2023

 Table 149 - Direct Selling GBN Brand Shares: % Value 2020-2023

Table 150 - Direct Selling Forecasts by Product: Value 2023-2028

Table 151 - Direct Selling Forecasts by Product: % Value Growth 2023-2028

Retail E-Commerce in the Netherlands

KEY DATA FINDINGS

2023 DEVELOPMENTS

Online grocery shopping seeing new developments as competition grows Increased focus on convenience with delivery Apparel and footwear retailers struggling with high volume of returns

PROSPECTS AND OPPORTUNITIES

Marketplaces expected to play an important role in the growth of e-commerce

Fast track couriers future uncertain

Increased sustainability efforts expected within retail e-commerce

CHANNEL DATA

Table 152 - Retail E-Commerce by Channel: Value 2017-2022Table 153 - Retail E-Commerce by Channel: % Value Growth 2017-2022Table 154 - Retail E-Commerce by Product: Value 2017-2022Table 155 - Retail E-Commerce by Product: % Value Growth 2017-2022Table 156 - Retail E-Commerce GBO Company Shares: % Value 2018-2022Table 157 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022Table 158 - Forecast Retail E-Commerce by Channel: Value 2022-2027Table 159 - Forecast Retail E-Commerce by Channel: % Value Growth 2022-2027Table 160 - Forecast Retail E-Commerce by Product: Value 2022-2027Table 161 - Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/retail-in-the-netherlands/report.