



Euromonitor
International

Bottled Water in the Netherlands

November 2025

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2025 DEVELOPMENTS

Health-driven growth, but alternatives provide notable competition

INDUSTRY PERFORMANCE

Warm summer weather boosts sales

Functional bottled water spurs growth

WHAT'S NEXT?

Changes in consumer habits will boost performance of bottled water

Systems for home carbonation will become an even more popular alternative to bottled water

Consumers will demand more transparency

COMPETITIVE LANDSCAPE

Spadel remains dominant in bottled water

Vitamin Well sees further dynamic growth

CHANNELS

Supermarkets dominates in bottled water

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EXECUTIVE SUMMARY

Soft drinks seeing an upturn

KEY DATA FINDINGS

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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

CHANNELS

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