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Consumer survey 2025

Deloitte Retail Sector Group September 2025

Summary

Each year, Deloitte commissions research agency Flycatcher to conduct a survey to gain insight into supermarket consumer trends, particularly trends involving product range, spending, diversification, future of food, innovation and development. The survey also explores new trends such as self-scanning, online ordering and ready-to-eat products. From this year onwards, attention will be paid to deposit money and global geopolitical tensions, too.

A total of 2,321 respondents aged 18 and over who regularly visit a supermarket have taken part in the survey.

Grocery shopping



Nearly all Dutch people visit a supermarket at least once a week (93%), averaging 2-3 times a week. The majority always do their grocery shopping in a physical supermarket (78%), while 19% of respondents use both a physical supermarket and an online supermarket. This is virtually the same as in the past two years.

Almost one-fifth of respondents who do both physical and online grocery shopping visit the same physical or online supermarket. Over one-third sometimes do their grocery shopping online in the same supermarket as their physical shopping and other times not, while 43% of respondents do their online grocery shopping in another supermarket. As shown in figure 1, cost is the main reason for choosing a different online supermarket. On top of that, 24% of respondents indicated that their own physical supermarket does not offer online groceries and that the products they buy online are not available in their own supermarket.



Overall (including both physical and online shoppers), two-fifths of respondents think grocery shopping is (great) fun, while over one-tenth do not like it (at all). Out of all respondents, 45% (very much) enjoy grocery shopping in a physical supermarket; for online supermarkets this is 24%.

Almost half of respondents use a digital or paper leaflet for weekly shopping at least once a week (46% and 47%, respectively).

Self-checkout



Out of all respondents, 89% say their supermarket offers self-scan check-out. This is a significant increase from 86% in 2023. Consumer use of self-scan services has remained virtually unchanged: 82% of respondents now use self-scanning methods compared to 81% in 2023 and 2024. They mainly use self-scan checkout (76%) and a self-scanning device (57%). The use of mobile phones as a self-scanning method has increased from 9% in 2023 and 2024 to 12%. Among those who avoid self-scanning, 57% report a preference for interacting with a cashier and 37% favour paying in cash.

Almost one-tenth of respondents say they sometimes come home and realise they forgot to scan some of the products, while only 2% admits to deliberately not scanning products sometimes. Of the latter group, 42% say they deliberately do not scan products as often as they did a year ago. The same number say they do so less often now, while 15% of respondents say they do so more often. More than half of respondents suspect others to sometimes forget to scan products (53%). The percentage of respondents who believe that others deliberately do not scan products has fallen from 68% in 2023 to 59% today. An overwhelming majority (90%) is okay with groceries being checked at self-scanning checkouts. Just under a fifth (18%) finds this annoying and 16% feel they are being singled out for checks every time.

Ordering groceries online



Like last year, most respondents do their online shopping at Albert Heijn (see figure 2).

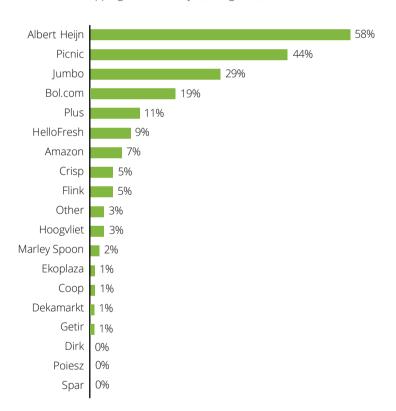


Figure 2: From which online supermarket(s) have you ever ordered products?

A vast majority (97%) of respondents who order groceries online prefer to have them delivered to their homes. Respondents who do both physical and online shopping mostly visit Albert Heijn (79%), Lidl (61%) and Jumbo (56%) as physical shops.

The respondents who never order online, representing 78% of all respondents, cite the following main reasons for this: the supermarket is close to home (58%), shopping in a physical supermarket is more enjoyable (49%), they want to see the products first (43%), and they do not want to pay extra for delivery costs (35%).

Out of all respondents, 14% would like to do their shopping online if their supermarket offers this option, while 86% do not plan to.

In addition, 11% plan to do online shopping at another supermarket in the future if their own supermarket does not provide this option.

The percentage of respondents who use a supermarket app has risen from 68% in 2023 to 77% today. The app is mainly used to search for special offers, obtain discounts, and collect loyalty points. By far the most widely used app is still the Albert Heijn app.

Sale of alcohol and tobacco



Respondents have little issue with the sale of alcohol in supermarkets: only 16% believe it should be banned. Over one-third (35%) of respondents think that alcohol, including wine and beer, should be sold in segregated areas in supermarkets.

Furthermore, it appears that 10% of the respondents smoke. The percentage of respondents who indicate that a tobacco shop has opened at their supermarket has fallen from 9% in 2024 to 7%. Almost everyone (98%) indicated that they do not visit other physical or online supermarkets because tobacco products are no longer allowed to be sold in supermarkets. More than half buy tobacco products in a specialist tobacco shop, 34% at a gas station, and 44% in a shop abroad. Compared to 2023, significantly more respondents now buy their tobacco products in a shop abroad.

Local and community involvement



A quarter of respondents rate the CSR policy of their current online supermarket as (very) good, compared to 37% for physical supermarkets. More than a tenth (15%) consciously choose a store that operates in a socially responsible manner, while 39% do not. A quarter believe that supermarkets should pay more attention to National Meat-Free Week, while 44% disagree. The latter is significantly higher than in 2023 (38%).

A third of respondents indicate that they would like to donate to charity when paying for their groceries if their supermarket offers this option. They would mainly like to do this by handing in their deposit receipt for charity or by buying extra products and handing them in for charity (both 19%).

Super Supermarkt Keurmerk



Almost 10% of respondents is familiar with the Super Supermarkt Keurmerk (SSK) quality mark. Out of this group, 35% of respondents know their supermarket has this quality mark and almost two-thirds did not know. The SSK label is based on seven pillars: sustainable energy, local involvement, distinctive product range, conscious waste reduction, safe environment, encouraging personnel policy, and smart logistics. Respondents consider the pillars safe environment, conscious waste reduction, encouraging personnel policy and smart logistics especially important. Local involvement is considered more important than in 2024 and 2023, while sustainable energy, conscious waste reduction, and encouraging personnel policy are considered less important than in 2023. When asked to rate their own supermarket on the seven pillars, safe environment scored highest with an average of 7.4. Local involvement of their own supermarket scored higher than in 2024 and 2023.

Future of food



Out of the respondents who eat meat, 44% do so 5 times a week or more, 37% eat meat 3 or 4 times a week and 19% less than 3 times a week. The percentage of respondents who eat less meat than in previous years has fallen from 35% in 2023 to 28%. The percentage of respondents who eat the same amount of meat has actually risen from 56% to 62%. In addition, 20% plan to eat less meat in the coming year than this year. This is significantly less than in 2024 (24%) and 2023 (27%). The main reasons for not eating meat or eating less meat are animal welfare (57%), personal health (52%), and reducing one's ecological footprint (47%).

Out of the respondents who eat fish, 23% do so at least twice a week and 35% eat fish once a week or less often. Over one-tenth (11%) of all respondents eat less fish and an equally large group eats more fish than in previous years. In addition, 5% want to eat less fish next year than this year and 12% want to eat more fish.

Out of the respondents who eat meat substitutes, 6% eat meat substitutes 5 times a week or more often, 39% do so 2 to 4 times a week and 49% once a week or less often. More than a tenth (15%) of respondents started eating more meat substitutes this year and 12% plan to eat more meat substitutes in the coming year. The latter is significantly less than in 2023, when 16% still planned to eat more meat substitutes.

Sustainability



Sustainability factors are generally important when people buy products from a physical or online supermarket. The most important factors are the use of pesticides (71%), the degree of animal suffering (69%), the degree of human exploitation (67%) and the amount of waste (64%). The extent to which the product is good for one's health is important for 75% of respondents. In addition, approximately half of the respondents have a (very) strong need for information on products regarding the use of pesticides (53%) and the extent to which the product is good for one's health (51%). The percentage of respondents who want (a lot) of information about the amount of waste has fallen from 43% in 2023 to 39% now.

To determine whether a food item is healthy, respondents mainly trust their own knowledge (66%), the product's nutritional values (46%) and the product's calories (35%).

Return of deposit bottles and cans



More than three quarters of respondents indicate that they return all deposit bottles and cans, 18% return 60% to 99%, 2% return less than 60% and only 1% indicate that they do not return deposit bottles and/or cans. Of those who do not return all deposit bottles and cans, a quarter (112 of the 488 respondents) indicate that there is no amount for which they would return all deposit bottles and cans. Those who indicate that there is an amount for which they would return all deposit bottles and cans state that this amount should be \leqslant 0.98 per bottle/ can.

Primary, secondary and tertiary supermarket



Respondents spend on average € 130 a week in a physical or online supermarket - about € 57 per family member. Table 1 shows the division between primary, secondary and tertiary supermarkets.

	total unweighted	total weighted	weighted per family member
average amount spent in primary supermarket	€ 85,37	€ 85,37	€ 37,77
average amount spent in secondary supermarket	€ 33,13	€ 29,93	€ 14,66
average amount spent in tertiary supermarket	€ 22,02	€ 14,43	€ 9,74
total	€ 140,52	€ 129,73	€ 57,40

Table 1: weekly spending

The distribution of spending among primary, secondary and tertiary supermarkets is similar to last year, although spending in the primary, secondary and tertiary supermarkets is significantly higher than in 2023. This seems to be mainly due to higher spending in physical supermarkets; spending in online supermarkets has not changed significantly. The primary supermarket is visited on average twice a week. The secondary supermarket is visited more than once a week, and the tertiary supermarket less than once a week. Compared with 2023, secondary supermarkets are visited more often. Albert Heijn is still the most visited supermarket by far (72%), followed by Lidl (46%) and Jumbo (39%).

70% of respondents use loyalty cards from primary supermarkets, while 52% use them from secondary supermarkets and 43% from tertiary supermarkets. The use of loyalty cards at primary, secondary and tertiary supermarkets has increased significantly since previous years.

Respondents rate their primary physical or online supermarket 7.8. At 8.1, parking facilities are rated best. The quality of chilled meals and checkout service (both 7.6) are now rated significantly higher than in 2023 (both 7.5). Key factors determining a person's ties to their primary physical and online supermarket are the distance, familiarity with where products are located, and good value for money. At 5%, the number of respondents who switched to another primary physical and online supermarket in the past year is significantly lower than in 2023, when 8% of the respondents switched supermarkets. People mainly switched from Albert Heijn, Lidl and Jumbo, with the main reasons for switching supermarkets being price (41%), distance (23%) and product range (19%).

Price increases, evaluation of and connection with primary supermarket



The vast majority of the respondents (87%) is concerned about rising food prices. This is comparable to 2023 and significantly higher than in 2024. The percentage of respondents who indicated that these concerns have led them to change their purchasing behaviour is 75%. Respondents have mainly changed their purchasing behaviour by buying products that are on sale (more often) and by buying cheaper products.

Respondents give their primary supermarket a rating of 7.84. This is an improvement on 2024 (7.80) and 2023 (7.77). The main reasons for loyalty to the primary supermarket are its proximity, familiarity with where products are located, and good value for money. There has been less switching between primary supermarkets.

Quality aspects of supermarkets



Respondents still consider price to be the most important aspect of a good supermarket. The main aspect for customer bonding to a supermarket is the distance from home to the shop. The most important aspects (after price and distance) are fresh produce in the fruit and vegetable section, high-quality private label products, and product availability.

Transport to the supermarket and parking



As in the past two years, well over two-fifths of respondents (44%) take the car to go to the supermarket, 26% take a moped or bicycle and 22% go on foot. Only a few people use public transport. The average distance to the supermarket is 2.21 kilometres. Respondents take an average of almost seven minutes to cover this distance.

Of the respondents who drive to the supermarket, almost everyone (94%) indicated that there are sufficient free parking spaces available at their primary supermarket. The type of parking facility is a reason why 71% of the respondents no longer visit the supermarket, with insufficient parking space (48%) or the parking facility being too far away (48%) being mentioned as the main reasons.

Product range



Respondents say the main aspect of a supermarket's product range is a good quality supply of fruit and vegetables (see figure 3). A sufficient supply of products, a wide selection of fruit and vegetables, the quality of good house brands and the quality of bread complete the top five. Compared to 2024, respondents consider a wide selection of A-brands to be less important..

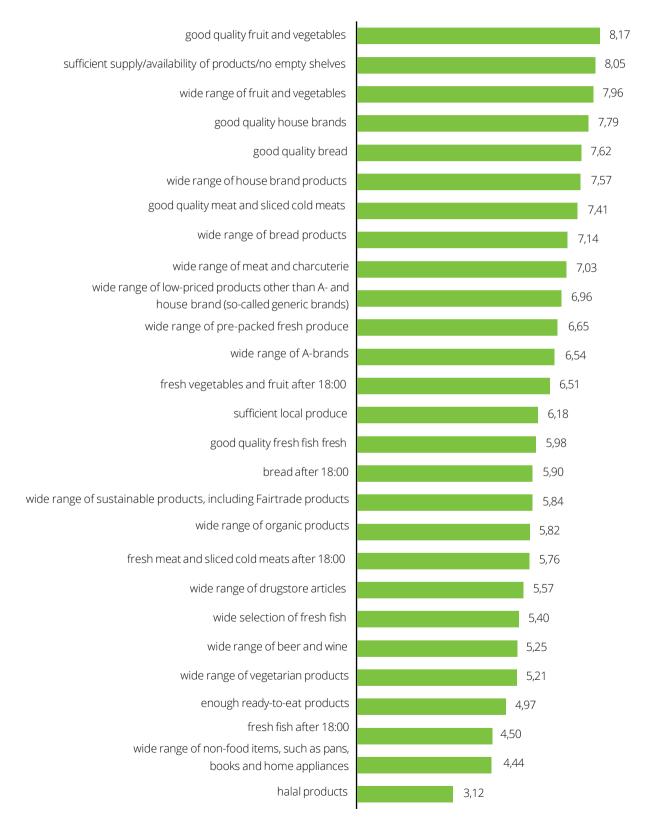


Figure 3: How much importance do you attach to the following aspects of a supermarket's product range? (1 = not important; 10 = extremely important)

Out of all respondents, 35% do not or no longer visit a particular supermarket because of its product range. This is significantly more than in previous years, when a quarter said they no longer visited a particular supermarket because of its product range. Aldi (23%), Lidl (9%), Coop (8%) and Jumbo (8%) are the most frequently mentioned supermarkets where the product range is the reason why people no longer visit them. The product range is a specific reason to visit a particular supermarket more often for 49%. This percentage is also significantly higher than in previous years (42%). The main supermarkets where people go more often because of the product range are Albert Heijn (51%), Lidl (26%) and Jumbo (20%).

Diversification / shopping abroad



69% Of respondents of respondents sometimes buy foodstuffs from shops other than supermarkets, especially from specialist shops (31%), at the market (29%), drugstores (25%), Action (25%) and HEMA (22%). The main reasons for buying foodstuffs from somewhere other than supermarkets are quality, price, and products being unavailable in supermarkets (see figure 4). Spending in shops in the Netherlands other than supermarkets and spending abroad both amount to 2% of total spending in physical and online supermarkets. Spending on food abroad, at Hema, Action and in specialist shops, is significantly higher than in 2023.



Figure 4: Why don't you buy these foodstuffs in physical and online supermarkets but somewhere else?

Payment method



The number of people who (almost) always pay using PIN/contactless at the supermarket remains roughly the same as in previous years, at 78%. The percentage of people willing to pay exclusively by PIN/contactless if asked to do so has also remained the same as in previous years, at 65%. The main reason for not always opting for PIN payment is that people want to decide for themselves how to pay right then and there.

Ready-to-eat products



Respondents eat breakfast at home on six days a week, while they eat lunch at home almost five days a week and dine at home over six days a week. This is comparable to previous years. People buy ready-to-eat products on average once a week, mostly for dinner and mainly in a physical or online supermarket (67%).

Supermarket experience



The main reason for respondents to visit a particular supermarket is product availability (66%). Respondents also visit a particular supermarket because of the loyalty card (52%) and the range of special products (40%). The appearance of the store, energy-efficient measures in the construction and design of the store, demonstrations/tastings, the pick-up point, and the range of special products are less important than in previous years.

Innovation



Respondents indicated that their primary physical or online supermarket could be improved in various ways, for example through lower prices and more self-scanning options. However, there are also respondents who indicate that no improvements are needed. Of the proposed innovations, the possibility of buying packaging-free is the most appealing; 24% find this (very) appealing. However, this percentage has fallen significantly since 2023. For 15%, the option to buy packaging-free would be a reason to switch to another physical or online supermarket. This percentage has also fallen significantly since 2023.

International developments



Almost a quarter of respondents no longer buy products from certain countries due to global geopolitical tensions. Thirty-seven percent of respondents have (partially) followed the Dutch government's advice to keep an emergency supply kit at home, 41% have not done so, and 22% say they already had the products at home before the advice was issued. More than a fifth indicate that, due to global geopolitical tensions, they are keeping a larger stock of food (24%) and buying more long-life products (23%).

Contacts

Contact data Deloitte Bas Smeets AA Branchegroep Retail 06 1201 1579 Postbus 1864 bsmeets@deloitte.nl 6201 BW MAASTRICHT drs. Dennie Wijnants AA 06 1201 1732 dwijnants@deloitte.nl **Esther Jane Pappin** Secretary 06 2019 6321 epappin@deloitte.nl Deloitte Patricia Versendaal AA Branchegroep Retail 06 1004 2248 Postbus 2031 pversendaal@deloitte.nl 3000 CA ROTTERDAM Deloitte André van IJperen Consumer Industry Consumer Industry leader Postbus 2031 06 5261 5646 3000 CA ROTTERDAM avanlJperen@deloitte.nl Deloitte Adglid Hop Consumer Industry European Retail lead Postbus 58110 06 5261 5646 1040 HC AMSTERDAM ahop@deloitte.nl Randy Jagt NL Retail & Future of Food lead

06 5008 3845 rajagt@deloitte.nl

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