

FMCG Breakout: *How Holie's is crushing competition*



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How Holie's is crushing competition

**NO SUGAR
NO WORRIES**
(TRUE STORY)

Ruben Hiji, Holie's
Liesbeth Ouwehand, NIQ

**insight
summit**
2025

Total Store Value Sales

€48.9bn

Value Sales Growth vs Last Year

+2.5%

Unit Sales Growth vs Last Year

-0.1%

2024

at a glance

Inflation eased, consumers remained cautious, Ecom growth continued and volumes started to recover

Ecom value share

+0.5%

% Non-Promo Price dev. LFL

+2.7%

% Promoted value

+0.2%pt

Private Label value share

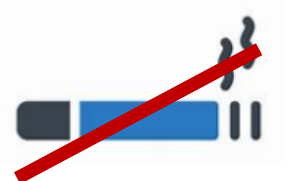
+0.1%pt

% Non-Promo price development Like-For-Like: based on basket of > 36.000 products sold in NL Supermarkets

% Promoted value: based on Sales Value Any Promo Feature / Display / Free quantity only in supergroups Fresh / Frozen Foods / Ambient / Personal & Health Care / Home Care

Private Label value share: based on supergroups Fresh / Frozen Foods / Ambient / Personal & Health Care / Home Care

Source: NIQ NL Scantrack Supermarkt and ACV Supermarkt | FMCG excluding Tobacco

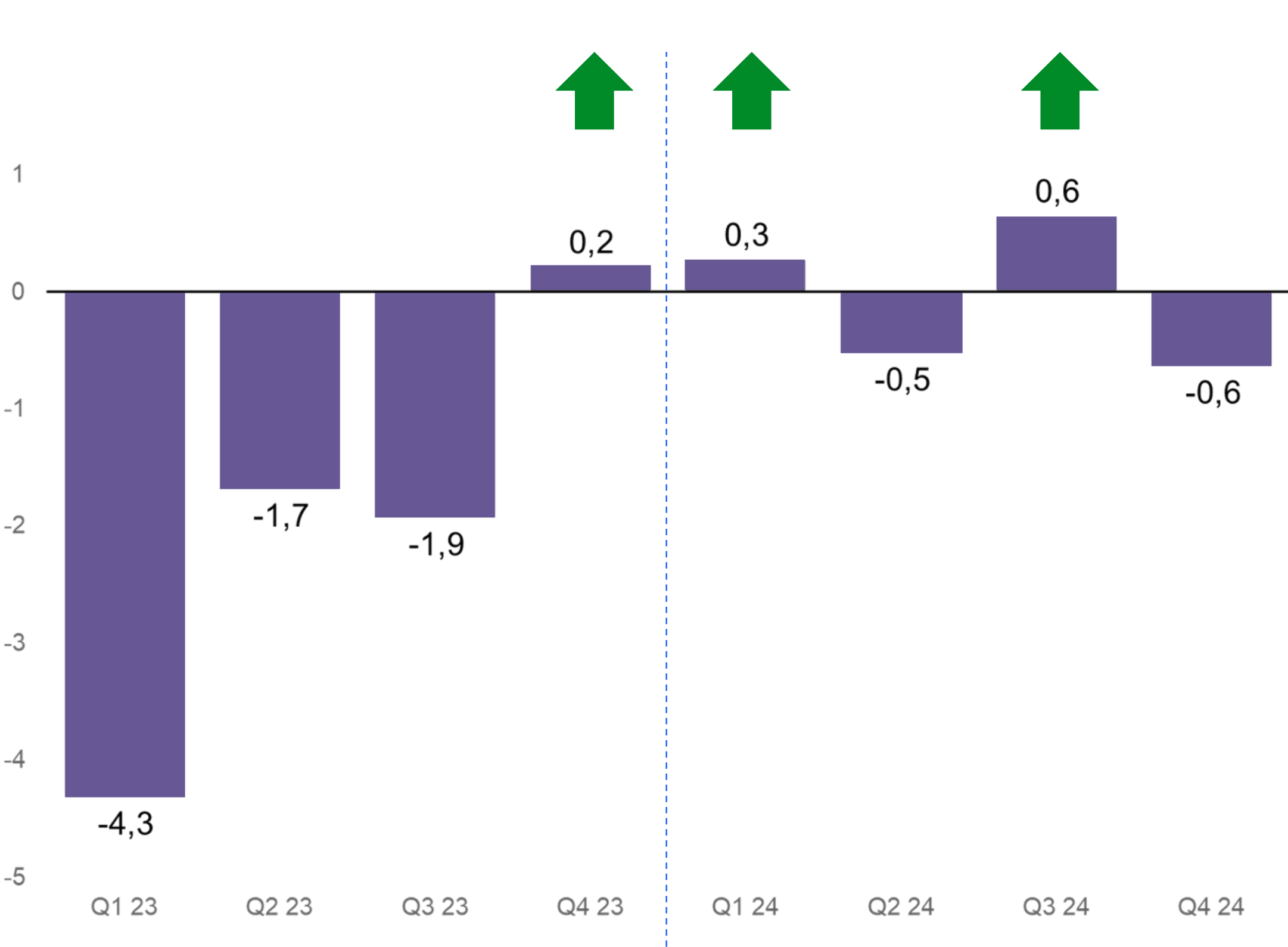


Volume growth

The 2024 Shift to unit revival, almost...

Except for Q2 2024 and Q4 2024, which faced tough comparisons due to a later Easter, heatwaves 2023 and New Year's timing (30/31 Dec 2024 sales reported in 2025)

Unit component in % Value development Supermarkets



-0.1%
2024 Full Year
Unit Growth
Up from -1.9% for 2023

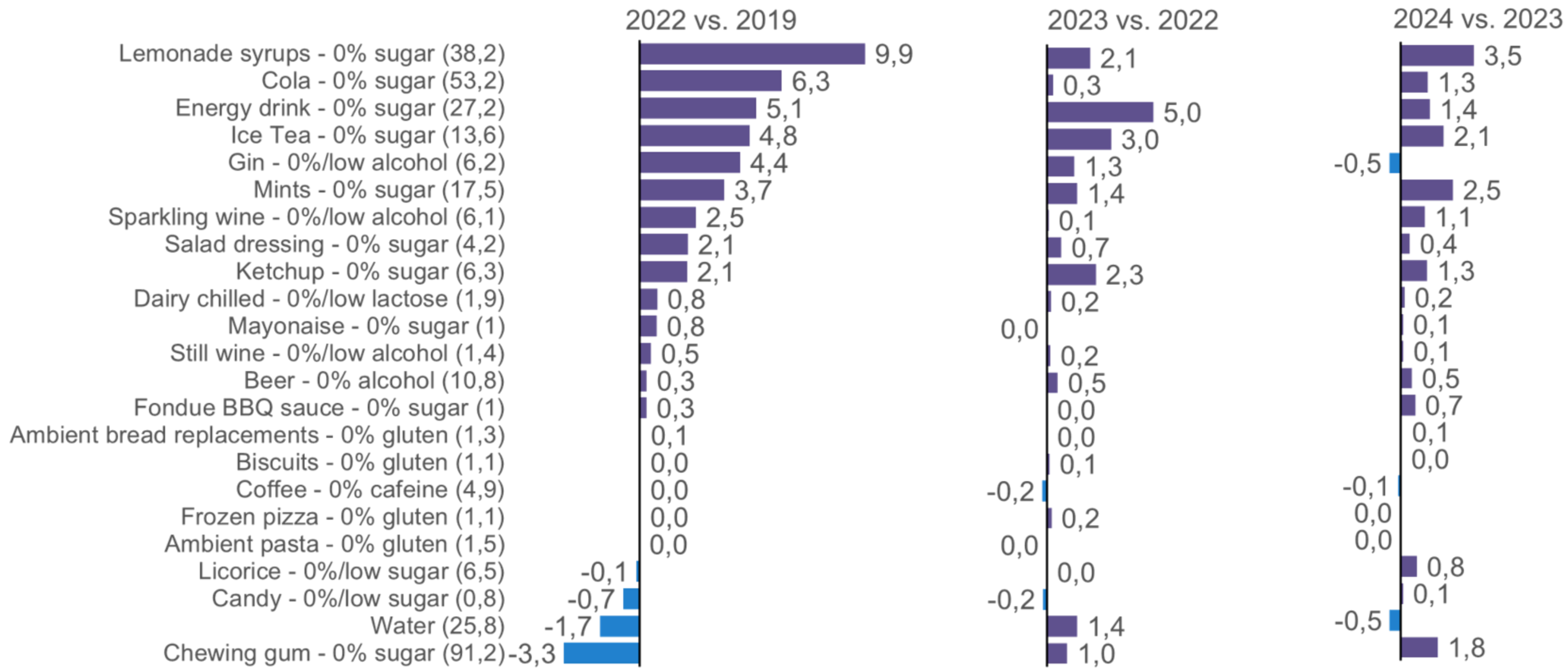
Source: NIQ NL ACV Supermarkt

Popular trends

Most Better for you... trends remain

After some stagnation in 2023 most trends show volume growth again

Supermarkt - Better for you - % Point Volume share change



() = 2024 Volume share in category



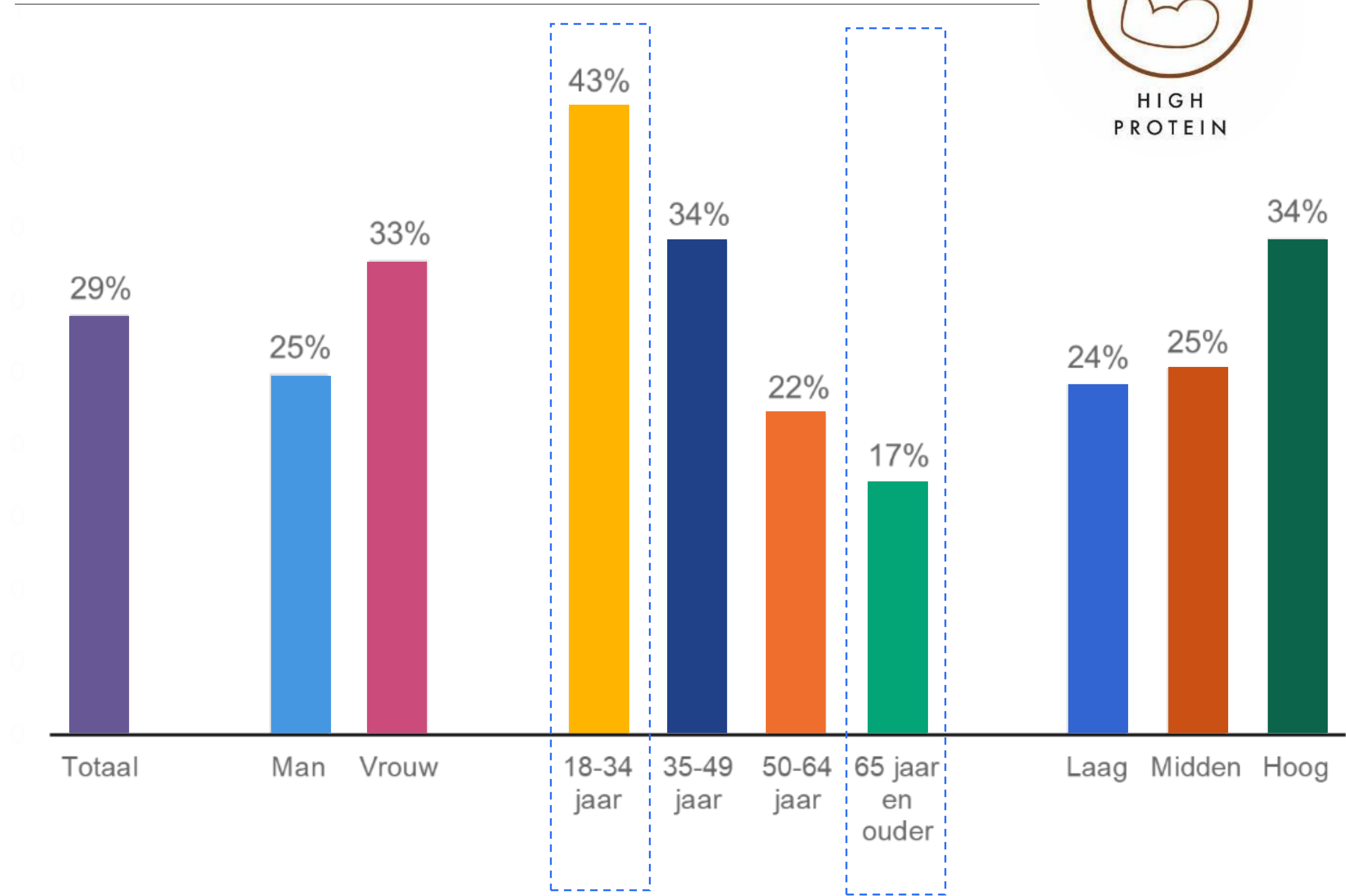
Source: NIQ NL Scantrack Supermarkt

Protein awareness

30% Of consumers eat products with extra protein

Big differences in age groups

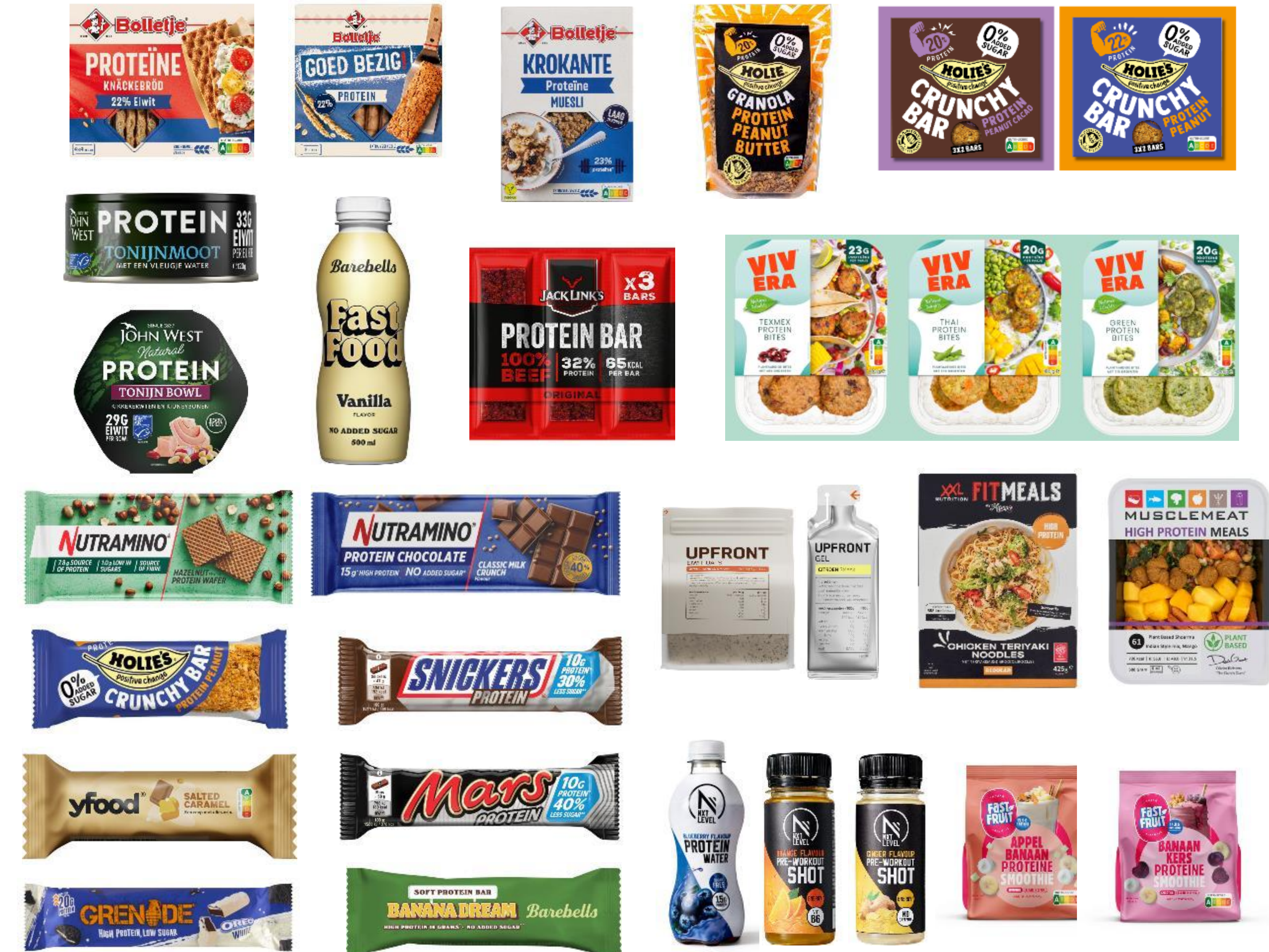
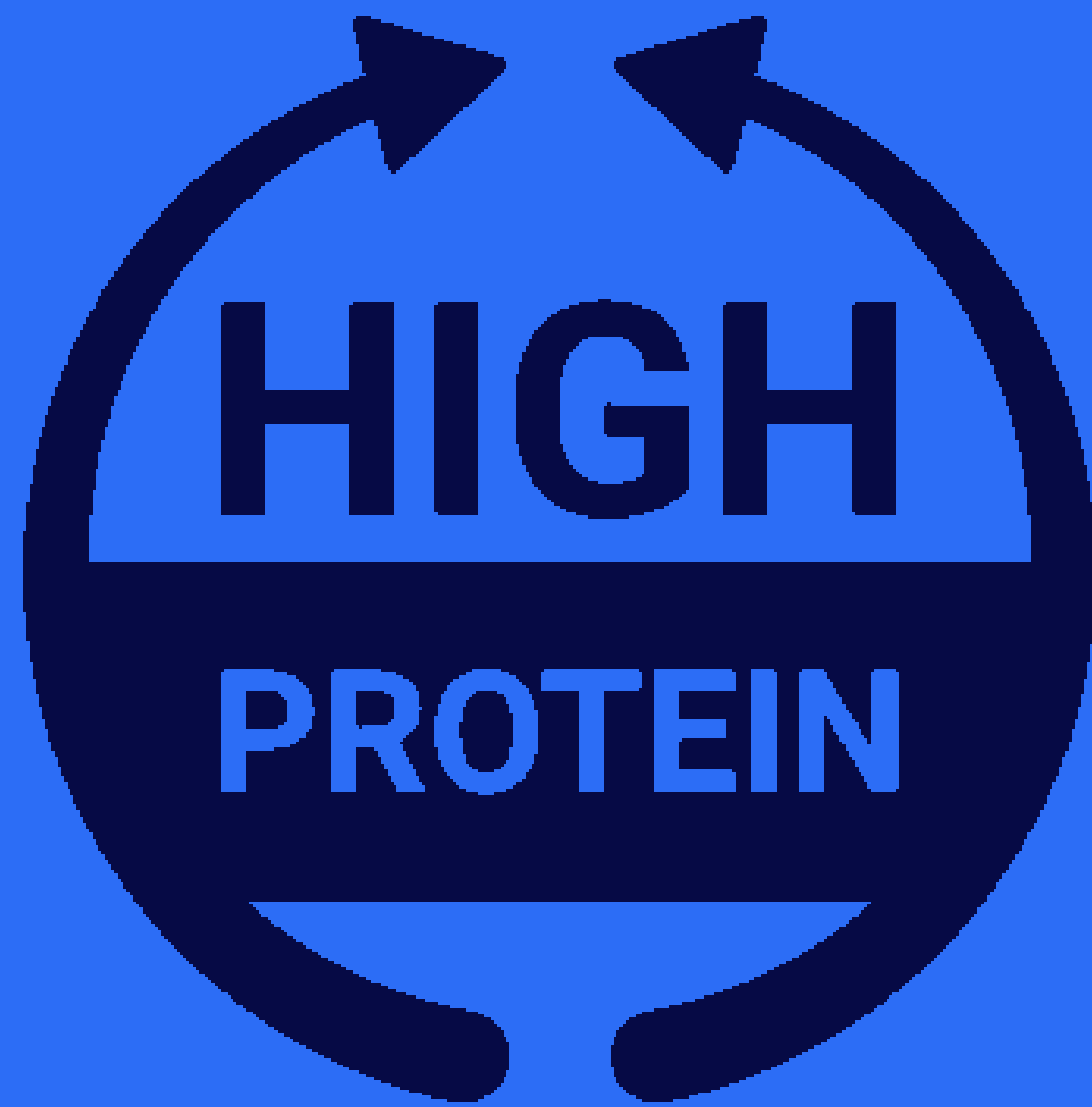
% Ja, ik eet of drink producten met extra eiwit/proteïne



Source: NIQ GfK consumer research March 2025 (= 14.500)



Also new
protein
products in
categories
outside Dairy



Top launches

Top new big brand/product launches in 2024 in supermarkets

As every year, Indulgence is well represented in the launches with the highest sales impact

Average sales per available week

€277K

Optimel
Proteine

Dairy Chilled



Protein
Flavor

€260K

Appelsientje
Fruit Drink

Juice Ambient



Price
Less sugar

€205K

DubbelFriss
Boost

Fruit Drink



Price
Less sugar

€192K

Coolbest
Fruit Drink

Juice Chilled



Price
Less sugar

€164K

Red Bull
The Sea Blue Edition

June Berry
Energy Drink



Flavor
Indulgence

€142K

Magnum
Euphoria Pink
Lemonade

Ice Cream



Flavor
Indulgence

€141K

Red Bull
The Winter
Edition Iced
Vanilla Berry

Energy Drink



Flavor
Indulgence

€137K

Powerade

Sport Drink



Health
Flavor

€132K

Samyang Buldak
Carbonara

Instant Snack Meals



Flavor
Convenience

€111K

Melkunie Breaker
Zero

Dairy Chilled



Convenience
Less sugar

Source: NIQ NL Scantrack Supermarkt | New products ranked on average sales value per available week > €21K

Top new big brand/product launches in 2024 in supermarkets

Average sales per available week

€38K
Holie's
Crunchy Bar
(4 new flavors)
In between bars

Proteine
Less sugar



€29K
Holie's
Crunchy Muesli
(5 new flavors)
Cereals

Proteine
Less sugar



€22K
Holie's
Granola
(4 new flavors)
Cereals

Proteine
Less sugar



Source: NIQ NL Scantrack Supermarkt | New products ranked on average sales value per available week > €21K

Thank you!



HOLIE'S®
positive change

THE #1 HEALTH CHALLENGER

Certified



Corporation

HI, I AM RUBEN



WHAT'S UP

1. HOLIE'S WHO?

2. THE BRAND

3. TRACTION

4. GAMEPLAN



CAUTION!
IF YOU HEAR THIS STORY,
YOU MIGHT BECOME SUPER HEALTHY



READY FOR HYPER GROWTH



MERICK
Co-founder &
CEO



VALENTIJN
Co-founder &
CMO



ARENT
Head of
Finance & Ops



RUBEN
Head of
Sales



SINGITA
Creative
Director



ASHLEY
Marketing
Director UK



BINA
Sales
Director UK



LARA
Commercial
Lead BE



CLAIRE
Key Account
Manager Retail



BREGJE
Key Account
Manager OOH



BELLE
Supply Chain
Manager



SAMIRA
Brand
Manager



JORDY
Creative



JAMES
Videographer



MATTHIJS
Business
Controller



STEFANIA
Finance
admin



PHILINE
Supply Chain
Support



ROOS
Office &
Culture



ARDINE
Creative
Producer



PIEN
Product
Innovation



**HOLIE'S
WHO?**

WE'RE IN A GLOBAL HEALTH CRISIS

52%

OF DUTCH PEOPLE ARE OVERWEIGHT*



MOST BRANDS ARE NOT HELPING:

Misleading claims & full
of hidden sugars



**WE'RE ON A MISSION
TO MAKE PEOPLE
HEALTHY AGAIN**

(NO SUGAR. NO WORRIES.)

WHY WE'RE SPECIAL



**NO HONEY.
NO SWEETENERS.
NOTHING.**



**WE'RE PACKED
WITH PLANT-BASED
PROTEIN.**



**HIGH IN PREBIOTIC
FIBRE. GOOD FOR
YOUR GUT.**



US VS. THEM

CEREALS

* ONLY SUGAR BY NATURE



Bolletje
Zonnatura'



UPFRONT
WAT OPRECHT IS WINT.



SUGAR	PROTEIN	FIBRE
2.9G	15.3G	18.3G
5G	17G	12G
6.2G	12.0G	12.0G
7.1G	27.0G	24.0G
9.8G	25G	7.7G
10.6G	13.6G	8.9G
10.6G	7.9G	12.9G
14.2G	10.6G	7.8G
20.8G	7.5G	6.2G

AVERAGE PER 100G



WE MADE IT TO THE TOP

Holie's just re-certified as a B Corporation with a top score of 126.2. This puts us in the top 3% of B Corp certified consumer brands in Europe.

RE-CERTIFICATION SCORE:

126.2

1.2 MORE POINTS THAN
TONY'S CHOCOLONELY!

**BRAND
UPDATE**

GOOD



**F*CKING
FEARLESS**

EVIL

**SCARED
SH*TLESS**

**99% OF ALL
COMPANIES**

THIS IS HOW WE DO IT

1

**DO WHAT DIES IN
THE BOARDROOM**

2

**DON'T INTERRUPT,
BUT ENTERTAIN**

3

**DO IT
YOURSELF**

THE HOLIE TRUTH



WE CHALLENGE THE STATUS QUO



OLD SCHOOL



DISRUPTIVE DESIGN



HỒT NEWS



STAY AHEAD (WITH THE HELP OF DATA)



>10 INTRO'S IN 2024

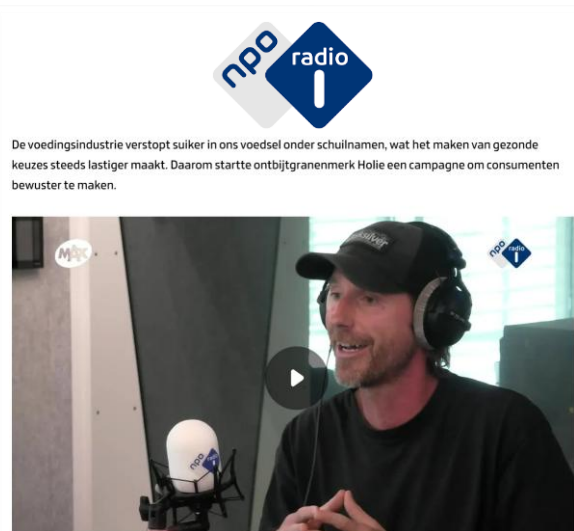
2025: 8 AND COUNTING

DARE TO SAY GOODBYE

MOM, WE'RE FAMOUS!



HOLIE FOODS WINT AMSTERDAM BUSINESS AWARD 2024



Over de aflevering
Sommige mensen zweren erbij: een goed ontbijt. Daarbij zijn we in Nederland ook niet vies van suikerige smeersels ander zoet beleg, en dat zorgt voor veel overgewicht. Een gat in de markt, dacht onze gast van vandaag. Want fit zijn, dat wil iedereen, maar lekker blijven eten willen we ook. Dus richtte hij Holie op, daarmee maakt hij gezonde crunchy muesli. Te gast is: Merick Schoute, mede-oprichter van Holie.

Adformatie

Holie komt met suikerzoete single voor een miljoen verkochte Crunchy Bars

Opnieuw komt het challenger-merk met een stuntje. Dit keer een gezongen ode aan een suikervrije ontbijtbar.

CAMPAGNES © 22 SEPTEMBER 2024 J. JASPER MULDER



V.l.n.r.: Merick Schoute, Benjamin Backs en Valentijn van Santvoort



Holie's komt met vijf nieuwe smaken Crunchy Muesli & Granola

ma 7 apr Productnieuws



1000 EUROPE'S FASTEST GROWING COMPANIES 2025

NOS



RTLnieuws

Het Parool

mt/sprout

Adformatie



De Telegraaf

D Distrifood

THE DUTCH INNOVATION AWARDS

WHEEL OF RETAIL



**GRANOLA &
CRUNCHY MUESLI**



**CRUNCHY BAR
PEANUT- CHOCOLATE**



**HEALTHIEST
INNOVATION**



FIRST BRAND IN 45 YEARS TO WIN 3 AWARDS



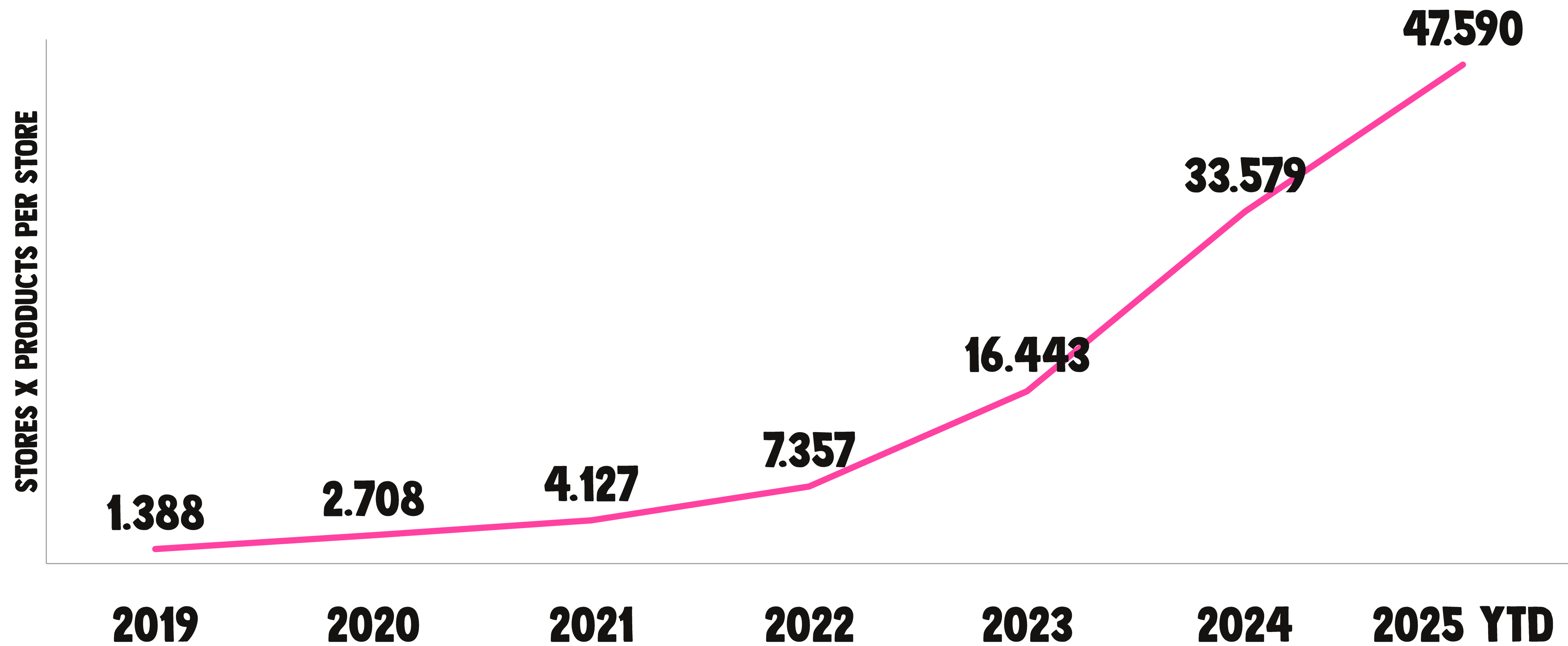
TRACTION

The word "TRACTION" is rendered in a bold, white, sans-serif font. It is set against a solid teal background. A thick black shadow is cast beneath the letters, extending to the right. From the right side of this shadow, several thin, parallel teal lines radiate outwards, creating a sense of motion or speed.

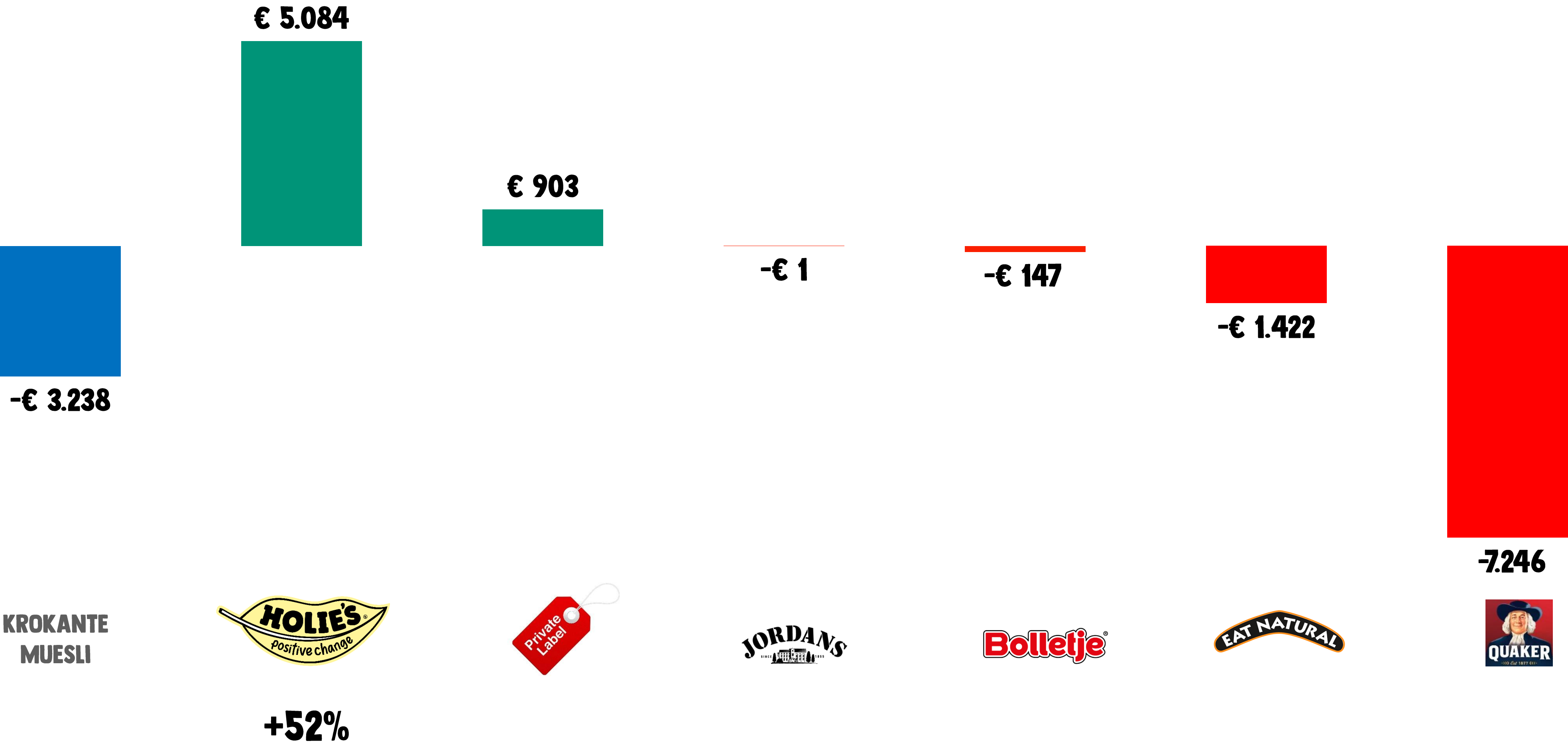
AVAILABLE EVERYWHERE IN THE BENELUX



INSANE RETAIL DISTRIBUTION IN NO TIME

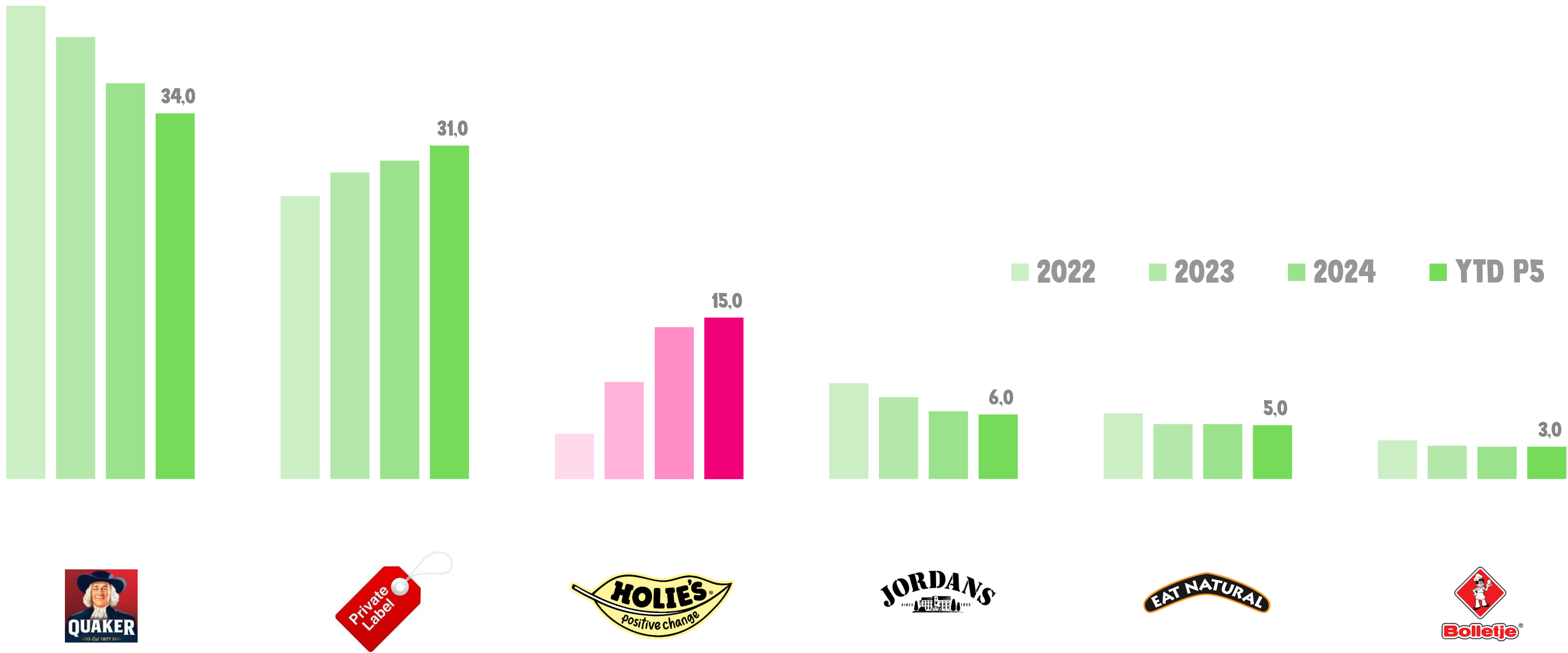


WE'RE THE #1 CEREALS GROWTH DRIVER IN NL



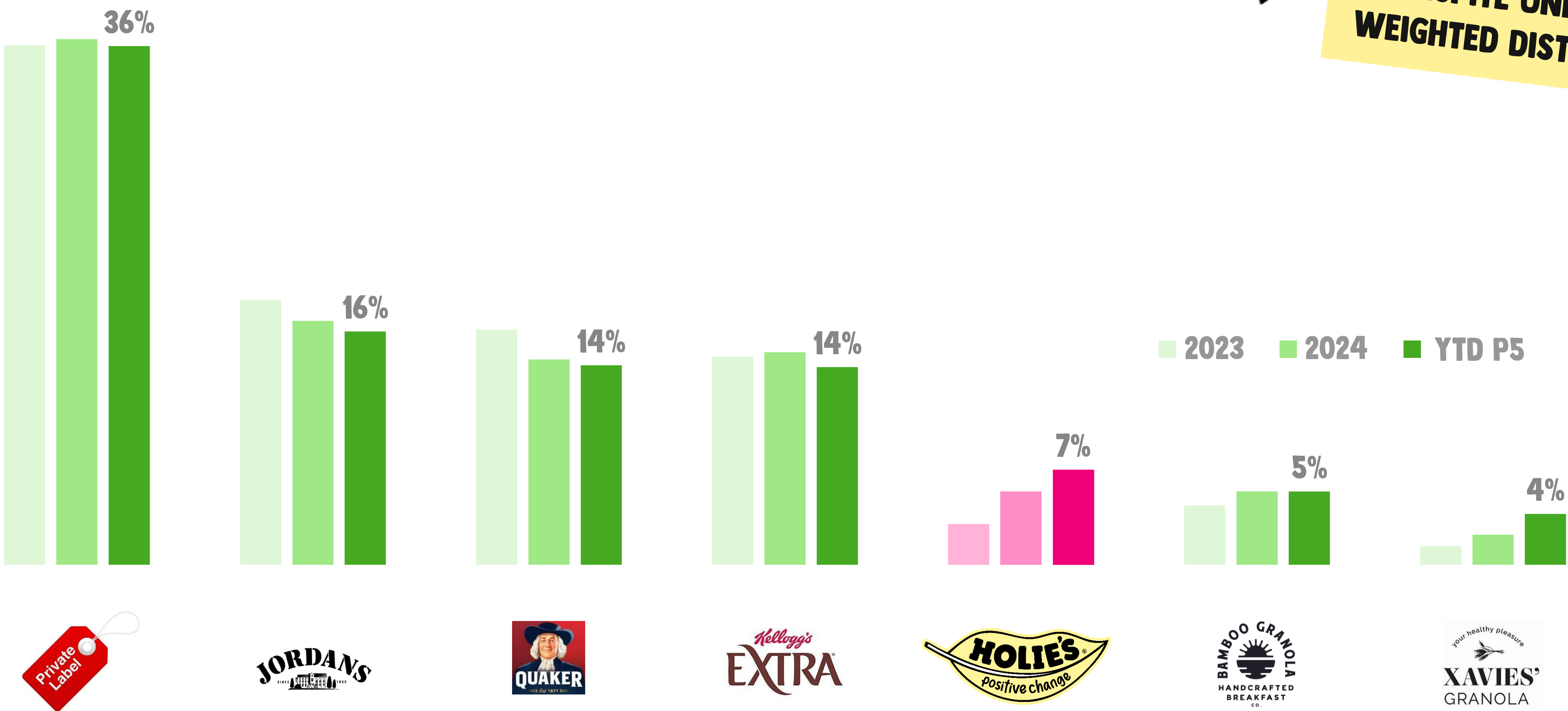
WE'RE THE #2 CEREALS BRAND IN THE NETHERLANDS

VMS% EVOLUTION IN NL - CRUNCHY CEREALS



WE'RE THE #4 CEREALS BRAND IN BELGIUM

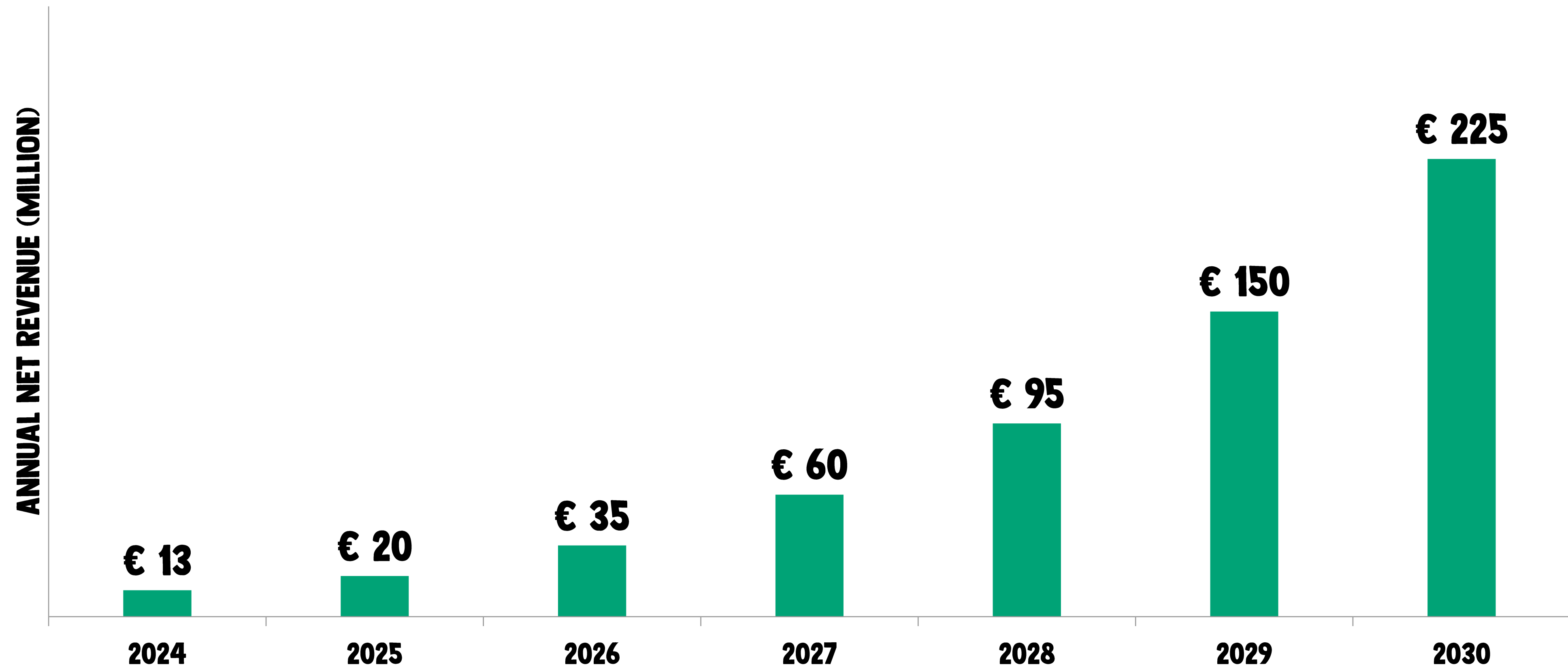
DESPITE ONLY 40%
WEIGHTED DISTRIBUTION



A close-up portrait of a man with dark hair, wearing a dark suit jacket, a light-colored shirt, and a dark tie. A white cloth is draped around his neck, partially covering the tie. He is looking directly at the camera with a neutral expression. The background is a plain, light-colored wall.

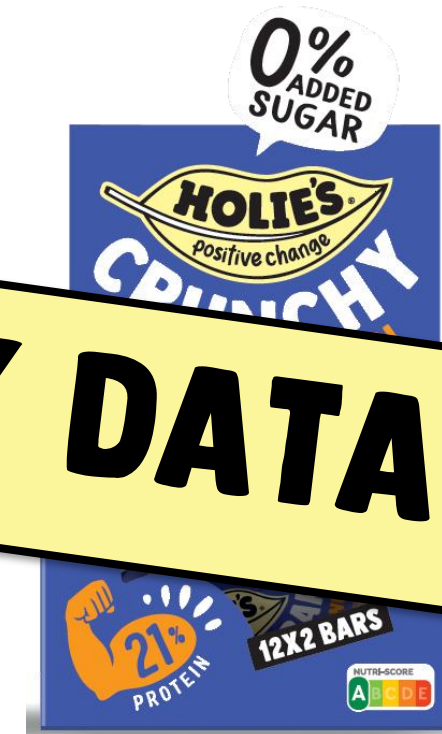
**WE'RE JUST
GETTING STARTED**

WE'RE BUILDING A €200M+ BRAND



HOW WE'LL GET THERE

SUPPORTED BY DATA



1

**DOMINATE BENELUX WITH
SCALE, EFFICIENCY AND
BRAND AWARENESS**

2

**RAPIDLY EXPAND
INTERNATIONALLY WITH
BENELUX PLAYBOOK**

3

**UNLOCK NEW REVENUE
STREAMS BY SETTING
UP OOH**

4

**ALWAYS BE ONE STEP
AHEAD WITH RELEVANT
INNOVATIONS**



KEY LEARNINGS

1

**DATA NEVER
LIES**

2

**YOU ARE THE
EXPERT**

3

**OWN THE
NARRATIVE**

NASA

LET'S GO





THANK YOU :)

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