

Report Brochure



THE NETHERLANDS WINE MARKET LANDSCAPE



MARCH 2015



REPORT PRICE • EUR 3,250 • 5 Report Credits

Report price



Report price:

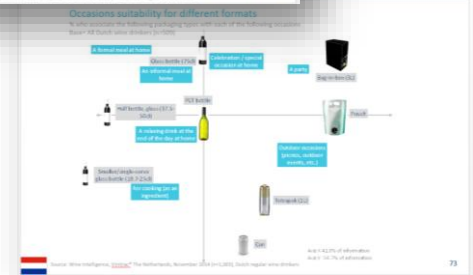
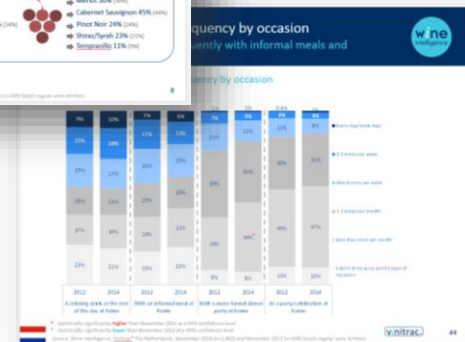
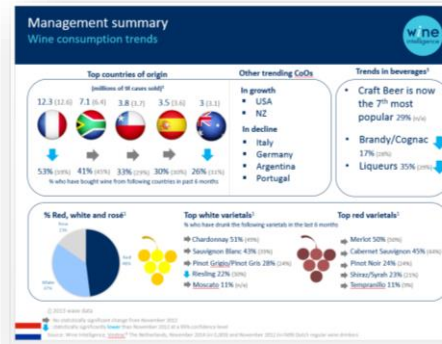
EUR 3,250
GBP 2,500
AUD 4,750
USD 3,850

Report credits:
5

Price also includes
**supporting data in
Excel**

(All Vinitrac® questions with
cross-tabulations by
gender, age, involvement
and wine packaging
purchase frequency)

86 page
PowerPoint
report



*All prices exclusive of VAT, GST or relevant local sale taxes at the current rate

Contents page



▪ Introduction	p. 4	▪ Wine consumption in the off-trade and on-trade	p. 43
▪ Management summary	p. 6	Off-trade consumption frequency by occasion	
▪ The global wine market	p. 14	Off- trade spend by occasion	
Wine Intelligence global market classification		Wine consumption in the on-trade	
Wine volume size and growth		On-trade consumption frequency by occasion	
Per capita consumption		On-trade spend by occasion	
▪ The Dutch wine market	p. 19	▪ Wine involvement and attitudes	p. 49
Still light wine by country of origin		Wine attitude	
Sparkling wine volume by country of origin		Involvement statements	
▪ Dutch wine consumers	p. 22	Wine involvement	
Overview of the Dutch wine market		Attitudes towards closure types	
Demographics: gender, age, region and income		▪ Brand health	p. 54
Wine consumption frequency		Brand awareness	
▪ Beverage repertoire	p.26	Brand conversion	
Alcoholic beverage repertoire		Brand purchase	
Proportion of red, white and rosé wine		Brand recommendation	
Varietal usage		▪ Packaging	p.64
Country of origin usage		Appeal	
Region of origin awareness, conversion and penetration		Purchase	
▪ Wine buying behaviour	p.38	Likelihood	
Channel usage when buying wine		Purchase frequency	
Retailer usage		Packaging Imagery	
Choice cues		Occasions Suitability	
		▪ Profiling by age group	p. 75
		▪ Methodology	p. 81

Excerpts from the introduction



‘If wine markets were people, the Netherlands would probably take the role of the reliable, but quiet one – one of the regulars in the bar. Nothing flash or high profile, but dependable: year in and year out, they buy similar drinks, in a similar way, not spending too much money, but also not going missing either.’

‘The country is still a significant consumer of wine – 38 million 9 litre cases in 2013, almost all of which imported. This puts Netherlands into the top 5 importing countries in the world, ahead of such market darlings as China and Japan. ‘

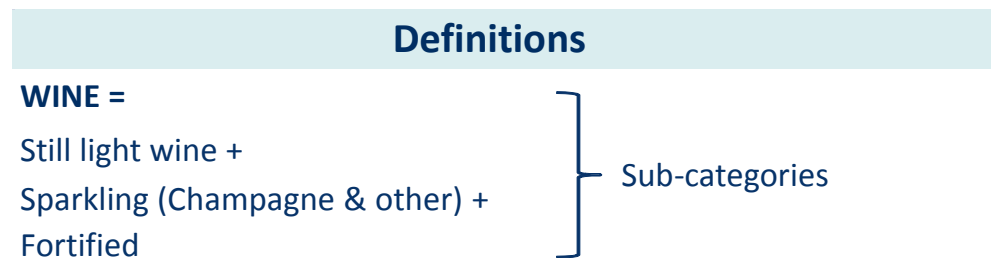
‘Dutch wine consumers know what they like, and know how to hunt down a bargain. In both traits, they are assisted by a retail channel, dominated by Albert Heijn, which is very effective at driving hard bargains on behalf of its customers, and providing low priced, reasonable quality own-label wines in large volumes.’

‘It feels like the Netherlands is emerging from a long economic hiatus, and is slowly dragging the wine market back into positive territory. It’s a more optimistic picture than we painted last year, but despite the green shoots of recovery it remains a tough market in which to make money.’

Richard Halstead
COO
March 2015



- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on- + off-premise)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International'
They are defined as followed:
 - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
 - 'International': Category including wine brands that have wines from various countries
- The IWSR includes the following types of wine in its definition of 'wine':



- The data for this study was collected in November 2012 and November 2014
- Data was gathered via Wine Intelligence's Vinitrac[®] online survey:
 - 509 Dutch regular wine drinkers in 2012
 - 1,003 Dutch regular wine drinkers in 2014
- Respondents were screened to ensure that they drink wine at least once per month; drink red, white or rosé wine; and buy wine in the off-trade and/or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The 2012 and 2014 data is representative of Dutch regular wine drinkers in terms of age and gender



SAMPLE SIZES

At least 500 respondents per survey; 1,000 in most countries, 2,000 in US
Regular adult wine drinkers (where 'regular' = drinks wine at least once per month)

Each Vinitrac® survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks wine at least once per month
- Drinks at least red, white or rosé wine
- Buys wine in the off-trade and/or in the on-trade channels

... and rejects all respondents who do not fulfil these Vinitrac® criteria



Each sample is representative of the 'regular' wine drinking population in that market and is therefore valid; a sample size of at least 500 consumers ensures results are reliable. It's like a 'smaller' version of the wine drinking population at large



WHY IS VINITRAC® NOT A PANEL?

- Panels are good for monitoring detailed purchase activity but require regular input from exactly the same complete group of respondents
- This requires more time from respondents, for which they are paid, and panels are therefore more heavily skewed towards home-based consumers, e.g. students and home-makers
- This group of a country's wine-drinking population does not fully represent the accurate weighted sample of adult regular wine drinkers on which Vinitrac® insights are based

HOW DOES VINITRAC® WORK?

- Invitations to participate in Vinitrac® are distributed to adult consumers in each market
- Consumers interested in a wine survey are directed to an URL address, which welcomes them to the online survey
- Wine Intelligence monitors incoming completed responses to build a sample representative of the wine drinking population of the target market
- When a representative sample of at least 1,000 (US: 2,000) is logged, the survey is closed



REPORT PRICE: • EUR 3,250 or 5 Report Credits

Format: 86 page PowerPoint (PDF)

Purchase online: <http://www.wineintelligence.com/product-category/report-type/wine-landscape-reports/>

Contact us directly: reports-shop@wineintelligence.com

If you have any questions, please contact your local Wine Intelligence office:

AVIGNON

Jean-Philippe Perrouty, Director, Wine Intelligence France | T +33 (0)486 408 417 | Email: jean-philippe@wineintelligence.com

GUANGZHOU USD

Rui Su, Research Manager | T +86(20) 8718 1277 | Email: rui@wineintelligence.com

CAPE TOWN

Dimitri Coutras, South Africa Country Manager | T +27 828288866 | Email: dcoutras@iafrica.com

DELAWARE

Erica Donoho, USA Country Manager | T +1 973 699 4158 | Email: erica@wineintelligence.com

FRANKFURT

Wilhelm Lerner, Associate Director/Germany Country Manager | T +49 (0)175 5806 151 | Email: wilhelm@wineintelligence.com

LONDON

Tetyana Halutva, Project Manager | T +44 020 7378 1277 | Email: tetyana@wineintelligence.com

SYDNEY

Natasha Rastegar, Australia Country Manager | T +61 (0) 428 755 057 | Email: natasha@wineintelligence.com

TRIESTE

Pierpaolo Penco, Italy Country Manager | T +39 349 424 3371 | Email: pierpaolo@wineintelligence.com