
BELGIUM LANDSCAPES

June 2018 Report

The logo for Wine Intelligence, featuring the word "wine" in a lowercase, sans-serif font with a white dot above the "i", and the word "intelligence" in a smaller, lowercase, sans-serif font below it. The logo is set against a light blue circular background.

wine
intelligence



Report overview

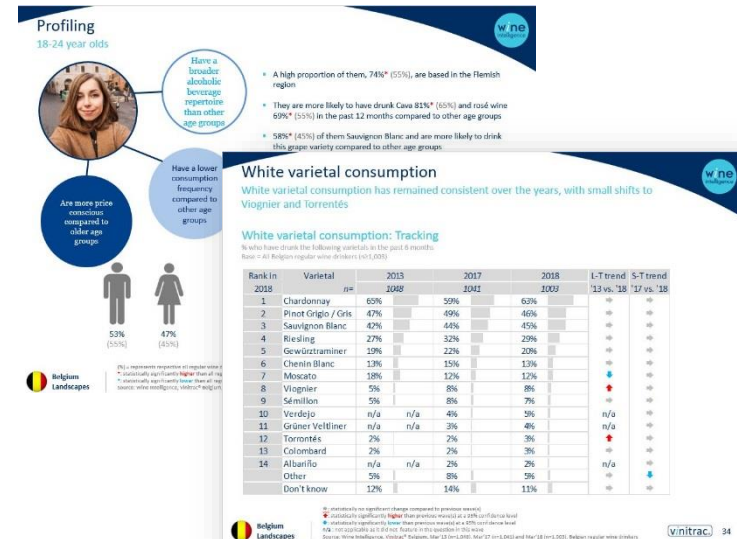


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Report price:
 GBP 2,500
 USD 3,500
 AUD 4,500
 EUR 3,000

The Belgium Landscapes 2018 report includes:

- A 105-page PowerPoint report with with the latest information regarding the Belgian wine market, supported by:
- Wine Intelligence Vinitrac
- Wine Intelligence market experience
- Secondary sources
- Trade interviews



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Introduction to Belgium Landscapes 2018 Report

Belgian consumers have a relatively traditional approach to wine: with a strong preference for wines from neighbouring France, food and wine pairing and traditional cork closures.

Within Belgium, there are two distinct regions, the Flemish region and the Walloon region, which have different wine consumption behaviours and attitudes towards wine. For example, the Walloon region Belgian regular wine drinkers have a stronger preference for wines from traditional French wine regions the Côtes du Rhône and Alsace while the Flemish region are more open to wines from New World countries such as South Africa.

An important aspect of Belgium is that, although it is one country, the wine drinking habits of the North Flanders and the Southern parts Wallonia are completely different
Wine merchant

In November 2015, the Government increased excise duty across numerous alcoholic beverages, including wine. Although spirits bore the main brunt of these increases, wine consumption was also been impacted. The trade report that this led to an immediate decline in volumes, and many suspect that an increasing number of Belgian consumers living close to the border are crossing into neighbouring countries to buy wine where they are a few euros cheaper or alternatively buying their wine over the internet.

Alcoholic beverages received a further blow in February 2017 from the government-backed campaign Tournée Minérale which promoted a month without alcohol. The campaign was very successful and its negative effects from the point of view of those retailers and on-trade was a steep drop in footfall. However, this year they prepared themselves by including non-alcoholic wine in their portfolios. The campaign will continue into following years thus opening up opportunities for non-alcoholic wines. Nonetheless, non-alcoholic wines will be a hard sell as few Belgian regular wine drinkers would consider buying this type of wine in the future.

Introduction to Belgium Landscapes 2018 Report

Belgium has always been a strong sparkling wine market, particularly for French Champagne. However it has undergone a substantial change of late. Cava consumption is booming and demand for French Champagne, while still strong, is waning. Cava is offering consumers a dry-style of sparkling wine but with a better price tag and while Champagne has been trying to offset these by offering promotions and lowering their prices, Cava has become the most popular sparkling wine in Belgium. Prosecco has also seen a growth in the market, however from a much lower base and the trade predicts that Cava will continue to be the nation's favourite as it is drier.

The Belgian wine trade feel positive that the market will remain strong, but highlight that as a traditional market, it is not open to unconventional innovations.

Key findings

Key trends in the Belgian wine market



1. THE IMPACT OF THE 2015 RISE IN EXCISE DUTY ON WINE

- The rise of excise duty on wine resulted in wine price increases for Belgian consumers, contributing to wine volumes decreasing
- Increase in consumers crossing into neighbouring countries or purchasing wine through the internet to search for better value or lower priced wines

2. THE BOOM OF CAVA AND WANING DEMAND FOR FRENCH CHAMPAGNE

- Cava has grown in popularity in Belgium replacing French Champagne as the nation's favourite sparkling wine
- Cava has become a more broadly enjoyed choice, offering a better price than French Champagne

3. THE TOURNÉE MINÉRALÉ CAMPAIGN: A THREAT TO WINE CONSUMPTION BUT INCREASING OPPORTUNITIES FOR NON-ALCOHOLIC WINES

- Tournée Minérale, a government-backed campaign promoting a month without alcohol, has potentially contributed to a decline in wine consumption
- The campaign has presented opportunities for non-alcoholic wines in the market but future consideration to buy these are low among Belgian regular wine drinkers

4. THE IMPORTANCE OF VALUE FOR MONEY AND FOOD AND WINE PAIRING IN BELGIUM

- Finding good-value-for-money wine that pairs well with food have been important factors for Belgian regular wine drinkers, the latter becoming more important to consumers since last year

5. BELGIAN CONSUMERS OPEN TO NEW WINES BUT NOT UNCONVENTIONAL INNOVATIONS

- Belgian trade experts report that Belgian regular wine drinkers are not likely to respond well to unconventional innovations, but are more likely to try new wine regions or grape varieties

- The data for this survey was collected in the Belgium in March 2013, March 2017, and March 2018
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
 - 1,048 Belgian regular wine drinkers (March 2013)
 - 1,041 Belgian regular wine drinkers (March 2017)
 - 1,003 Belgian regular wine drinkers (March 2018)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade 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 data is representative of Belgian regular wine drinkers in terms of age, gender and region

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability



Trade interview methodology

- Trade Interviews were conducted with seven experienced industry professionals in the Belgian wine trade in May and June 2018
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The five interviewees were members of the wine trade working in different roles:
 - 1 x Wine brand manager
 - 1 x Wine merchant
 - 1 x Wine educator
 - 1 x Market consultant
 - 1 x Wine writer and educator

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Purchase online: <http://www.wineintelligence.com/belgium-landscapes-2018/>

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