



WINE INTELLIGENCE

NETHERLANDS WINE LANDSCAPES

JULY 2020

REPORT BROCHURE

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INTRODUCTION



Though the Netherlands is not normally associated with the wine industry, particularly when compared with neighbours Germany and France, the Dutch wine market is ranked the fifth most attractive wine market worldwide and continues to remain stable in terms of volume and frequency of consumption.

Traditionally a low-price market, Dutch wine drinkers have started to spend more on wine in recent years, with spend per bottle increasing significantly for all off- and on-trade occasions since 2014. Reasons for this have included: higher incomes, broader wine choice, and the growth of the online channel. Additionally, the duty cut in January of 2017 has led to higher Dutch consumption of sparkling wine, primarily Cava.

In line with global trends, there is a growing interest in other alcoholic beverages, including beer and gin, which are emerging as strong competitors to

wine in the Dutch market. Moderation trends are also evident, with wine consumers becoming increasingly mindful about alcohol levels when purchasing wine. As a result, alcohol-free drinks are benefitting from health-conscious drinkers as well as campaigns to boost awareness of the zero-alcohol category.

The Dutch market is going through a cultural shift, similar to what is seen on a global level. Consumers are not only trading up for better quality wine and folding other alcohol beverages into their repertoire, but are also displaying health-driven attitudes by prioritising ABV when purchasing wine. The long-term effects of COVID-19 are yet to be seen, though trade experts do anticipate the continued use of online wine-buying channels and a more cautious consumer as the Netherlands begins to reopen.

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LANDSCAPES REPORT RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in the Netherlands in March 2014, 2017, 2019 and 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

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 Dutch regular wine drinkers in terms of gender and age

The distribution of the sample is shown in the table

		<i>Mar-14</i>	<i>Mar-17</i>	<i>Mar-19</i>	<i>Mar-20</i>	
		<i>n=</i>	<i>1015</i>	<i>1000</i>	<i>1017</i>	<i>1000</i>
Gender	Male	51%	52%	52%	48%	
	Female	49%	48%	48%	52%	
	Total	100%	100%	100%	100%	
Age	18-24	11%	10%	10%	11%	
	25-34	17%	15%	15%	14%	
	35-44	17%	18%	18%	18%	
	45-54	19%	17%	17%	18%	
	55 and over	36%	40%	40%	39%	
	Total	100%	100%	100%	100%	

Wine Intelligence, Vinitrac® Netherlands, Mar'14, Mar'17, Mar'19 and Mar'20, n≥1,000 Dutch regular wine drinkers

COVID-19 IMPACT REPORT RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in the Netherlands in April 2019 and April 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

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 Dutch regular wine drinkers in terms of gender and age

The distribution of the sample is shown in the table

		Apr-19	Apr-20
		n= 1017	1000
Gender	Male	52%	48%
	Female	48%	52%
	Total	100%	100%
Age	18-24	10%	11%
	25-34	15%	14%
	35-44	18%	18%
	45-54	17%	18%
	55 and over	40%	39%
	Total	100%	100%

Source: Wine Intelligence Vinitrac® Netherlands, Apr' 19 and Apr '20 (1st April 2020 – 8th April 2020), n>=1,000 Dutch regular wine drinkers

RESEARCH METHODOLOGY: QUALITATIVE



TRADE INTERVIEWEES

Trade interviews were conducted with 5 experienced industry professionals in the Netherlands wine trade in 2020

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The 5 interviewees were members of the wine trade working in different roles:

1 x Wine Sales Director

1 x Consultant, Educator, & Journalist

1 x Wine Consultant

1 x Wine Editor

1 x Wine Buyer

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