A division of the IWSR Group

Netherlands

Wine Landscapes 2022

Contents

Wine Intelligence Viewpoint

The Dutch wine market has seen a decrease in the population of wine drinkers, although involvement with the category is increasing and drinkers are buying wine at higher prices than before

The Dutch wine-drinking population is in decline for both monthly and weekly drinkers, despite the adult population growing.

Dutch regular wine drinkers are consuming significantly less red and white wine than in previous years, aligning with an overall decline in the volume of wine sold in the market.

Despite this, the involvement level of Dutch regular wine drinkers has increased in the long-term and greater numbers of wine drinkers are likely to be interested in wine as a passion subject or for personal benefit than before.

In addition, the amount typically spent by Dutch regular wine drinkers has increased significantly across almost all occasions in both the on-trade and off-trade.

There are also signs of growing demand for sparkling wine within the Dutch market and the volumes sold have grown by almost 4% since 2016.

The knowledge base of Dutch regular wine drinkers has decreased compared to both 2019 and 2021. They are aware of fewer brands, countries and regions of origin than before.

Opportunities

Increasing involvement among drinkers
Premiumisation of the wine market
Increasing interest in sparkling wine

Threats

Decreasing consumption of still wine
Declining wine knowledge
Inflationary pressure and supply chain issues

Management Summary

Netherlands Wine Landscapes

2022

Management summary

Key takeaways

1. The Dutch wine drinking population is contracting

The wine drinking population within the Netherlands shrunk between 2017 and 2022, with the number of weekly wine drinkers declining by a quarter and monthly wine drinkers by almost the same amount. This was despite the adult population growing by around 5% during the same time period.

2. Changing demographics of Dutch regular wine drinkers

Since 2019, the population of regular wine drinkers in the Netherlands has become increasingly female and older, with almost half now 55 or older.

3. Wine drinkers have a narrower alcohol repertoire

Consumption incidences among Dutch wine drinkers is significantly lower for the three main categories in the market – beer, red wine and white wine. Consumption incidences for rosé wine and Prosecco have remained stable.

4. Increasing involvement with the wine category

Although the size of the wine-drinking population has shrunk in recent years, those that have stuck with the category have shown a greater level of involvement with it.

Management summary

Key takeaways

5. Declining objective knowledge among Dutch drinkers

The knowledge base among Dutch wine drinkers has significantly decreased since 2019 and 2021 even though the involvement levels with the beverage have increased, meaning Dutch regular wine drinkers are aware of fewer countries and regions of origin as well as brands

6. Evidence of premiumisation as spend grows

The amount being spent typically by Dutch consumers has increased significantly since 2019 across almost all occasions in both the off and on-trade

7. RWDs on-trade consumption yet to return to pre-pandemic levels

Although all Covid-19-related restrictions that could affect the consumption of wine in the on-trade have now been relaxed, purchase incidences of Dutch regular wine drinkers have yet to match their pre-pandemic levels

8. Dutch regular wine drinkers appear happy, but aren't going out

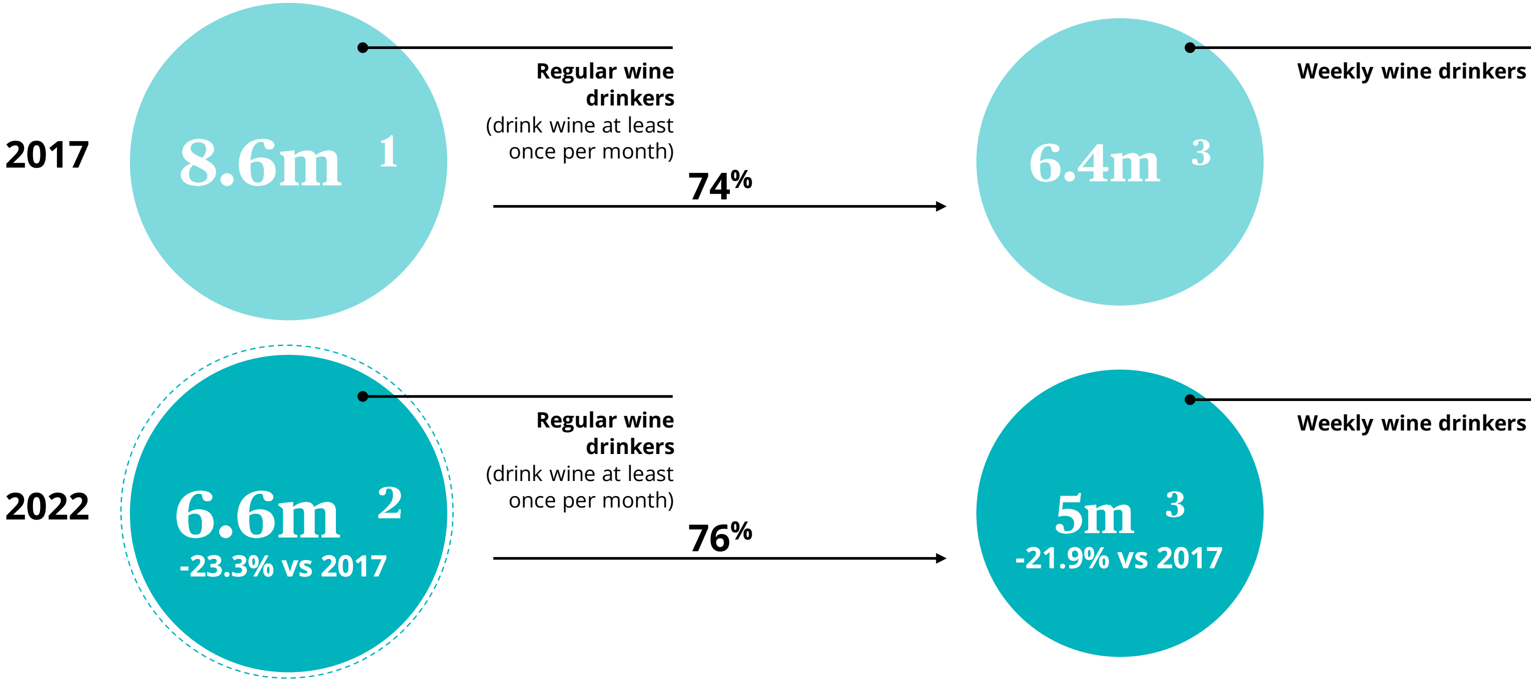
Dutch RWDs were happy with their current situation when asked and confident about their abilities to manage their finances, although they are worried about what the next years will bring, and they also are going less than before

1. The Dutch wine drinking population is contracting

The impact of COVID has been acute on regular wine drinking, with the proportion drinking wine at least once a month falling by 23.3% and weekly drinkers by 21.9% since 2017, despite the adult population of the country growing by around 5% during the same period

Decline in wine drinking population

Those who drink wine at least once a month



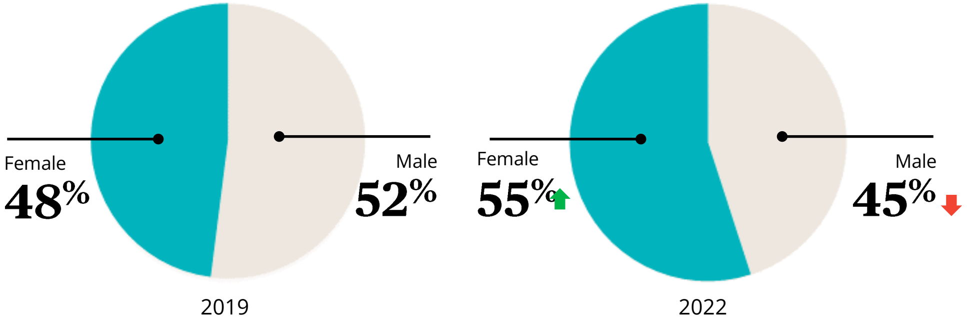
1 Wine Intelligence online calibration study with YouGov, October 2016 (n=1,000) Dutch adults. Wine=still light wine (red, white, rosé)
2 Wine Intelligence online calibration study with YouGov, rolling average of September 2019 and February 2022 (n≥1,000) Dutch adults. Wine=still light wine (red, white, rosé)
3 Wine Intelligence, Vinitrac® Netherlands Mar '17 & Apr '22 (n≥1,000) Dutch regular wine drinkers

2. Changing demographics of Dutch regular wine drinkers

With a smaller regular wine drinking population, women and older consumers now make up a significantly larger proportion of Dutch regular wine drinkers than in 2019

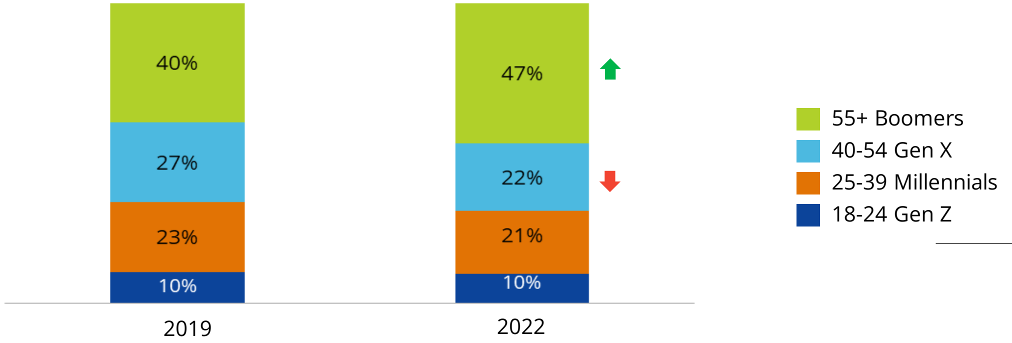
Gender of Dutch regular wine drinkers

Base = All Dutch regular wine drinkers (n≥1,009)



Generation cohorts of Dutch regular wine drinkers

Base = All Dutch regular wine drinkers (n≥1,009)



Q: What do market experts say?

"I think 40- to 60-year-olds are drinking the most wine in the Dutch market. Younger drinkers are more likely to be drinking across lots of different categories."

Market analyst, Netherlands

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

3. Wine drinkers have a narrower alcohol repertoire

Dutch wine drinkers have significantly lower consumption incidences across several beverage categories including both red and white wine. Penetration of other categories such as rosé wine and Prosecco have remained stable

Alcoholic beverage repertoire: Tracking

% who have drunk the following beverages in the past 12 months
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	White wine	82%	84%	80%	→	↓
2	Red wine	75%	74%	71%	↓	→
3	Beer	70%	67%	61%	↓	↓
4	Rosé wine	47%	50%	47%	→	→
5	Liqueurs	30%	32%	34%	→	→
6	Prosecco	36%	35%	33%	→	→
7	Whisky / Whiskey	29%	29%	30%	→	→
8	Craft beer	34%	31%	29%	↓	→
9	Champagne (French Champagne)	32%	29%	28%	↓	→
10	Cocktails	24%	25%	25%	→	→
11=	Rum	22%	23%	20%	→	→
11=	Vodka	23%	24%	20%	→	↓
13	Port	24%	19%	19%	↓	→
14	Cava	20%	20%	18%	→	→
15	Gin	17%	19%	16%	→	↓

Historic and forecast volume growth by category

Five-year CAGR %

Source: The IWSR

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

4. Increasing involvement with the wine category

The smaller regular wine drinking population is showing increased involvement levels in the category, which could be the influence of the pandemic. Greater numbers of regular wine drinkers had the spare time to involve themselves more with the category, and those exiting the regular wine drinker population appear to be from less involved groups

Wine involvement: Tracking

Base = All Dutch regular wine drinkers (n≥1,009)

	2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
High involvement	**20%**	**25%**	**25%**	⬆	➡
Medium involvement	**39%**	**42%**	**42%**	➡	➡
Low involvement	**41%**	**33%**	**34%**	⬇	➡

Wine involvement by generation

Base = All Dutch regular wine drinkers (n=1,009)

	Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
High involvement	**25%**	**11%**	**37%**	**29%**	**20%**
Medium involvement	**42%**	**48%**	**33%**	**39%**	**45%**
Low involvement	**34%**	**40%**	**30%**	**32%**	**34%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

5. Declining objective knowledge among Dutch drinkers

Although involvement levels with the wine category have increased since 2019, there has been a decline in the knowledge base of Dutch regular wine drinkers, meaning they are aware of fewer brands, countries and regions of origin. This could be a result of the pandemic, with consumers spending less time browsing in physical retail environments or the on-trade

Wine knowledge index: Tracking

Base = All Dutch regular wine drinkers (n≥1,009)

	2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
Knowledge Index	**34.3**	**33.7**	**32.1**	⬇	⬇

-2.2 Index change

Wine confidence index: Tracking

Base = All Dutch regular wine drinkers (n≥1,009)

	2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
Confidence Index	**44.8**	**45.9**	**45.6**	➡	➡

+0.8 Index change

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.
Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

6. Evidence of premiumisation as spend grows

There is evidence that growing engagement in the category is translating to higher spending. Dutch regular wine drinkers are typically spending significantly more across most occasions, both in the off-trade and the on-trade, compared to 2019. This also suggests that those leaving the category may have been lower spenders

Off-trade: Typical spend per bottle by occasion

Base = Those who buy wine in the off-trade

	2019	2022	Tracking
A relaxing drink at the end of the day at home	€ 5.23	€ 5.52	⬆
With an informal meal at home	€ 5.37	€ 5.64	⬆
With a more formal dinner party at home	€ 6.16	€ 6.51	⬆
At a party / celebration at home	€ 5.48	€ 5.93	⬆

On-trade: Typical spend per bottle by occasion

Base = Those who buy wine in the on-trade

	2019	2022	Tracking
A relaxing drink out at the end of the day	€ 13.49	€ 14.99	⬆
With an informal meal in a pub / bar / restaurant	€ 15.06	€ 15.93	⬆
With a more formal dinner in a restaurant	€ 18.23	€ 19.09	⬆
At a party / celebration / big night out	€ 14.58	€ 15.70	⬆

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

7. On-trade drinking not yet at pre-pandemic levels

Although all COVID-related restrictions affecting the consumption of wine in the on-trade have been relaxed, purchase incidences among Dutch regular wine drinkers have yet to match pre-pandemic levels. Younger generations, in particular Gen Z, have significantly higher purchase incidences in the on-trade compared to all regular wine drinkers, but are smaller in number

Wine purchase in on-trade

% who buy wine in a bar, pub or restaurant
Base = All Dutch regular wine drinkers (n≥1,009)

On-trade location		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
Bar or Pub	Yes	48%	41%	42%	↓	→
	No	52%	59%	58%	↑	→
Restaurant	Yes	86%	83%	82%	↓	→
	No	14%	17%	18%	↑	→
On-trade	On trade drinker	88%	84%	83%	↓	→
	Not on trade drinker	12%	16%	17%	↑	→

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Dutch regular wine drinkers (n=1,009)

On-trade location		Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
Bar or Pub	Yes	42%	54%	60%	39%	32%
	No	58%	46%	40%	61%	68%
Restaurant	Yes	82%	94%	87%	80%	78%
	No	18%	6%	13%	20%	22%
On-trade	On trade drinker	83%	97%	88%	81%	79%
	Not on trade drinker	17%	3%	12%	19%	21%

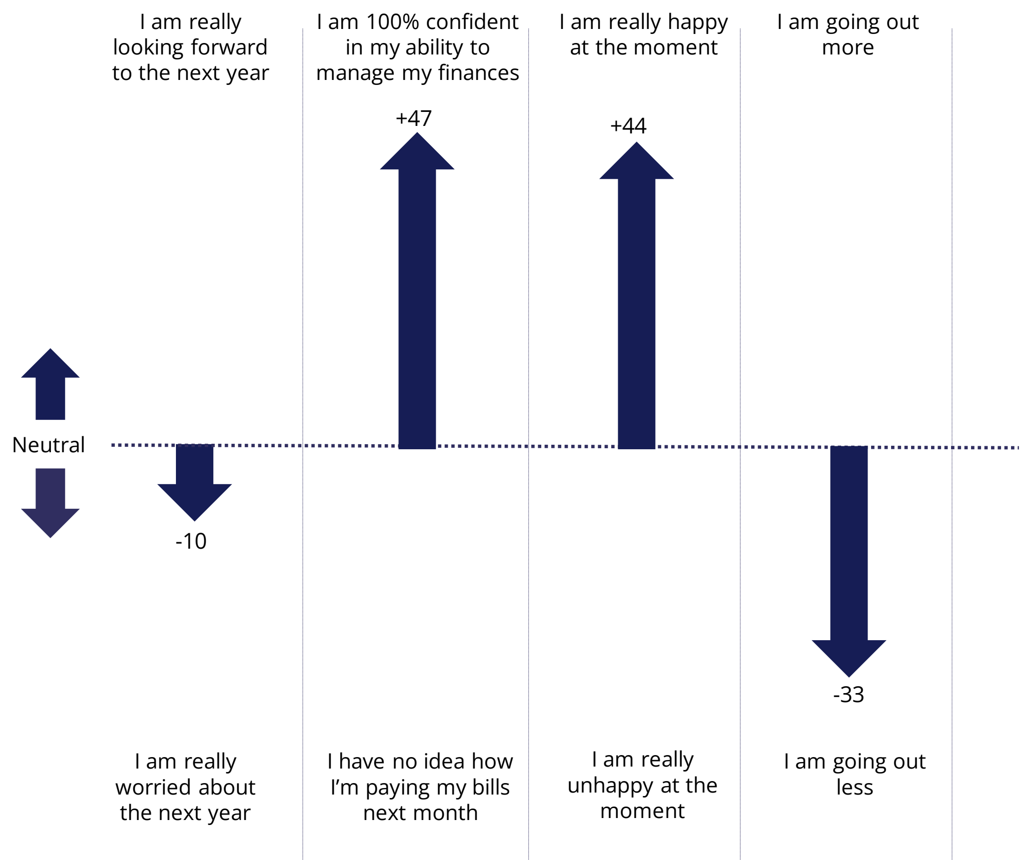
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

8. Dutch regular wine drinkers appear happy in life, but are not going out as much

Dutch regular wine drinkers are happy with their current situation and confident about their ability to manage their finances, although they are worried about what the coming year will bring, and are going out less than before

Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Dutch regular wine drinkers (n=1,009)



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Management summary – tracking metrics

The gap between wine brands is narrowing, as it is between countries of origin

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2019	2022	Tracking
White wine	82%	80%	→
Red wine	75%	71%	↓
Beer	70%	61%	↓
Rosé wine	47%	47%	→
Liqueurs	30%	34%	→

Top country of origin

% who have drunk wine from the following places in the past six months

	2019	2022	Tracking
France	59%	55%	↓
Spain	35%	31%	↓
South Africa	40%	31%	↓
Italy	32%	31%	→
Chile	31%	25%	↓

Top region of origin

% who have drunk wine from the following regions in the past six months

	2019	2022	Tracking
Bordeaux	25%	20%	↓
Prosecco	17%	15%	→
Rioja	15%	12%	→
Mosel	13%	12%	→
Médoc / Haut-Médoc	11%	12%	→

Top wine brands

% who have bought the following brands in the past three months

	2019	2022	Tracking
Lindeman's	20%	15%	↓
Supermarket own brand	18%	11%	↓
Wild Pig	15%	9%	↓
Kaapse Pracht	12%	8%	↓
J.P. Chenet	11%	8%	↓

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

Management summary – tracking metrics

The top grape varieties are being drunk less frequently than in previous years by Dutch regular wine drinkers

Top red varietals

% who have drunk the following varietals in the past six months

	2019	2022	Tracking
Merlot	54%	49%	⬇
Cabernet Sauvignon	44%	39%	⬇
Pinot Noir	32%	27%	⬇
Shiraz / Syrah	24%	20%	⬇
Tempranillo	17%	16%	➡

Top wine-shopping channels

% who have bought wine from the following channels in the past six months

	2019	2022	Tracking
In a supermarket	84%	81%	➡
At an off-licence chain	40%	36%	⬇
At a wine shop	24%	26%	➡
At a wholesaler	10%	10%	➡
From a supermarket website	n/a	10%	n/a

Top white varietals

% who have drunk the following varietals in the past six months

	2019	2022	Tracking
Chardonnay	57%	53%	⬇
Sauvignon Blanc	50%	47%	➡
Pinot Grigio / Pinot Gris	33%	35%	➡
Riesling	24%	23%	➡
Grüner Veltliner	12%	13%	➡

Top wine-buying choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine

	2019	2022	Tracking
Grape variety	66%	67%	➡
Wine that matches / complements food	64%	65%	➡
A brand I am aware of	59%	63%	⬆
Taste / wine style descriptions on shelves / la	61%	61%	➡
Promotional offer	63%	60%	➡

n/a = tracking unavailable for this wave

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

Market Data

Netherlands Wine Landscapes

2022

Market data

Key takeaways

1. Decline in the volumes of wine sold in the Dutch market

Between 2016 and 2021 wine saw a decline of 1.5% in total volumes sold, with the category forecast to decline by a further 0.5% by 2026.

2. Sparkling wine volumes grew

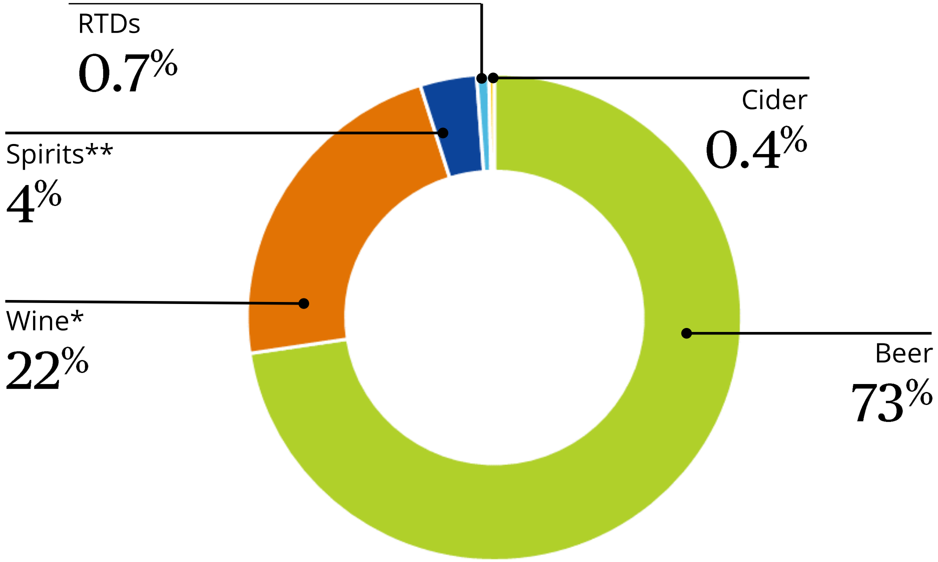
Although all other styles of wine saw declining volumes, sparkling wine's volumes have grown by 3.8% since 2016.

Total beverage alcohol market share by category

Beer continues its dominance of the Dutch market with around three-quarters of total alcohol volume

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

'000s 9-litre cases

	2020	2021
Total beverage alcohol	166,668.32	170,567.35
Beer	119,638.89	123,900.00
Wine*	39,423.90	38,396.30
Spirits**	6,006.79	6,310.27
RTDs	1,054.30	1,358.00
Cider	544.44	602.78

Source: IWSR

* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

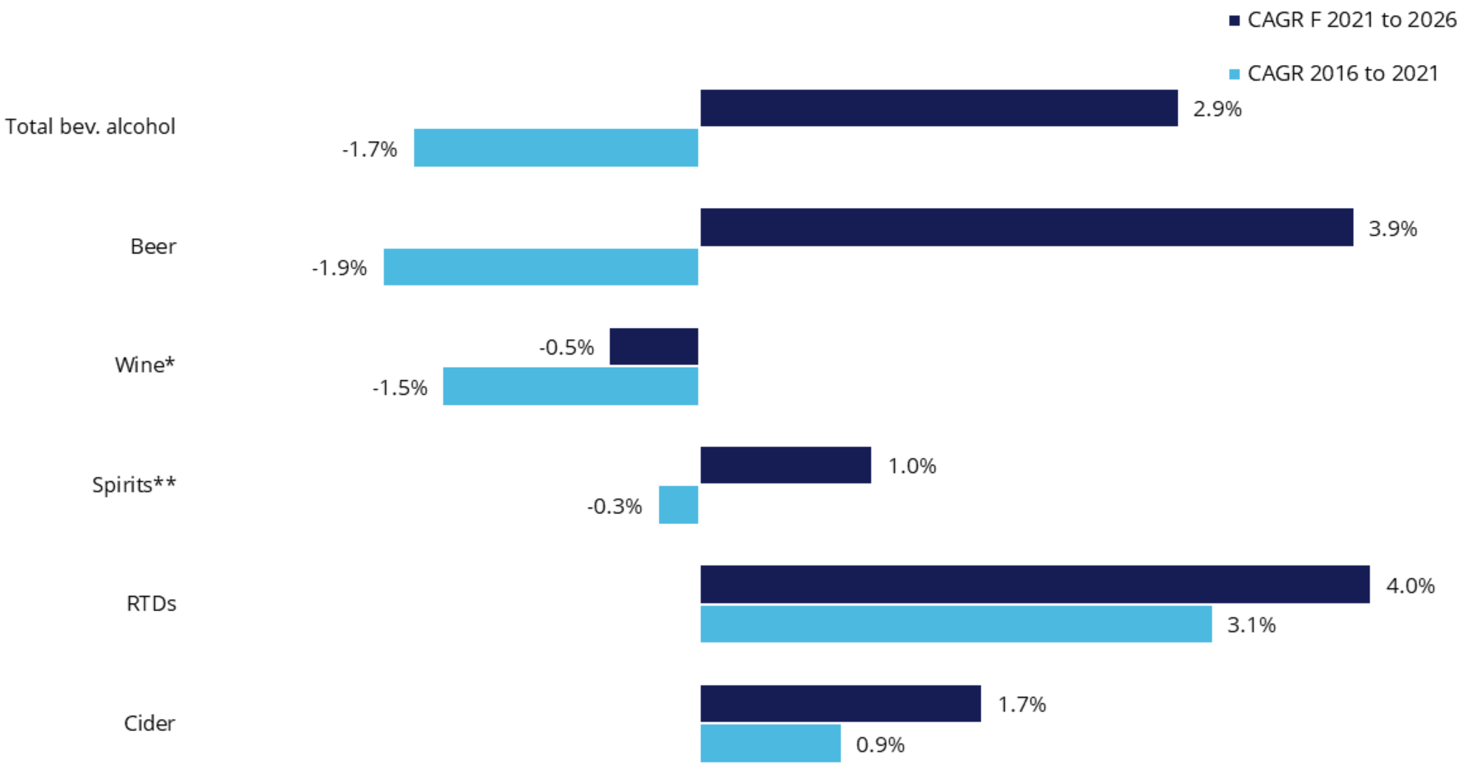
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Alcohol market change 2016-2026

Beer and RTDs are expected to drive growth in beverage alcohol over the next five years in the Netherlands, with wine continuing to see volume decline, though at a slower pace than before

Historic and forecast volume growth by category

Five-year CAGR %



Source: IWSR

* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

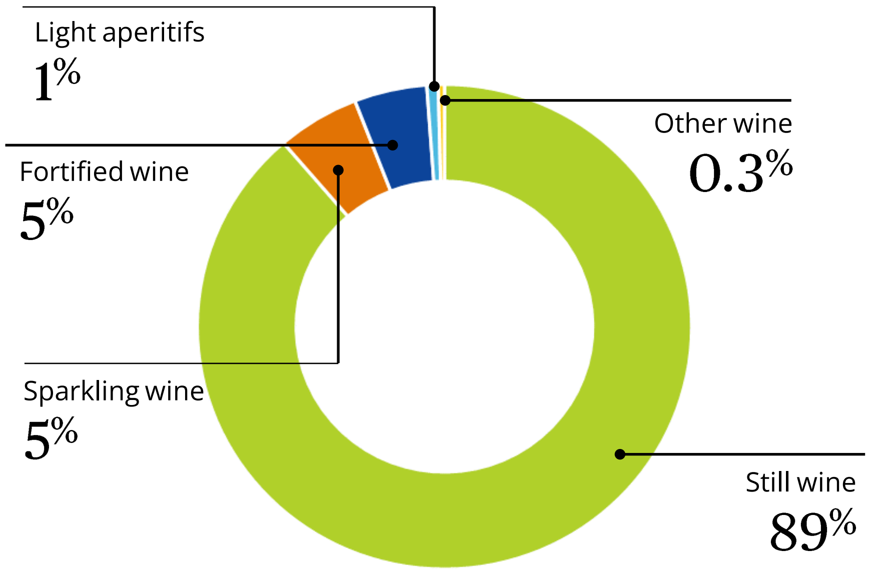
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Total wine market volumes

Although still wine has experienced a slight decline in its volumes since 2020, it undoubtedly holds the largest market share by wine category

Total wine share by category

% of purchases that fall within the categories below



Total wine volumes by category

'000s 9-litre cases

	2020	2021
Total Wine	**39,423.90**	**38,396.30**
Still Wine	**35,208.00**	**34,111.00**
Sparkling Wine	**1,934.75**	**2,072.80**
Fortified Wine	**1,918.90**	**1,829.50**
Light Aperitifs	**262.00**	**287.00**
Other Wines	**100.25**	**96.00**

Other Wines includes non-grape based wines

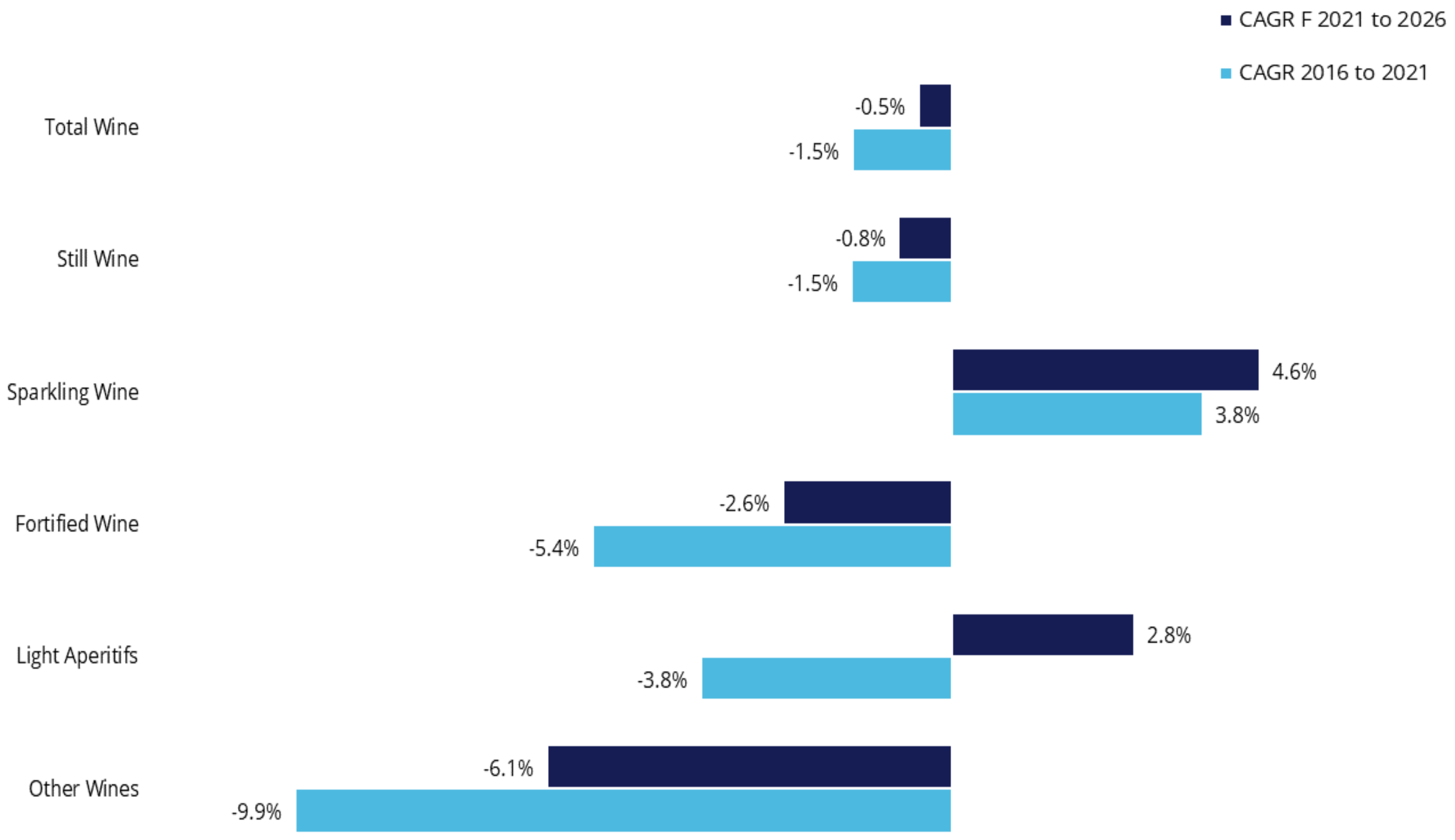
Source: IWSR

Wine market change 2016-2026

Sparkling wine is the standout category with growth forecast to continue in the coming years. Still wine is expected to experience a downturn along with the other wine categories

Historic and forecast volume growth by wine type

Five-year CAGR %



What do market experts say?

"A couple of years ago we had our bubble tax lifted, which gave a big impulse to the sparkling wine sales."

Wine importer, Netherlands

Source: IWSR

Still wine volumes by origin

French wine is the market leader with a third of the market by volume, while South Africa and Chile represent 17% and 12% of the market share respectively

Total still wine volumes and market share by origin

'000s 9-litre cases

		2020	2021	Market Share
	Total	**35,208.00**	**34,111.00**	
1	**French**	**11,100.00**	**10,700.00**	**31%**
2	**South African**	**5,901.00**	**5,724.00**	**17%**
3	**Chilean**	**4,010.00**	**3,949.00**	**12%**
4	**Spanish**	**3,949.45**	**3,900.25**	**11%**
5	**Italian**	**2,335.00**	**2,450.00**	**7%**
6	**Australian**	**2,600.00**	**2,259.50**	**7%**
7	**US**	**1,310.00**	**1,298.00**	**4%**
8	**German**	**1,248.00**	**1,218.25**	**4%**
9	**Argentinian**	**991.00**	**864.00**	**3%**
10	**International**	**489.00**	**466.00**	**1%**

*International refers to wine where grapes are from multiple countries of origin

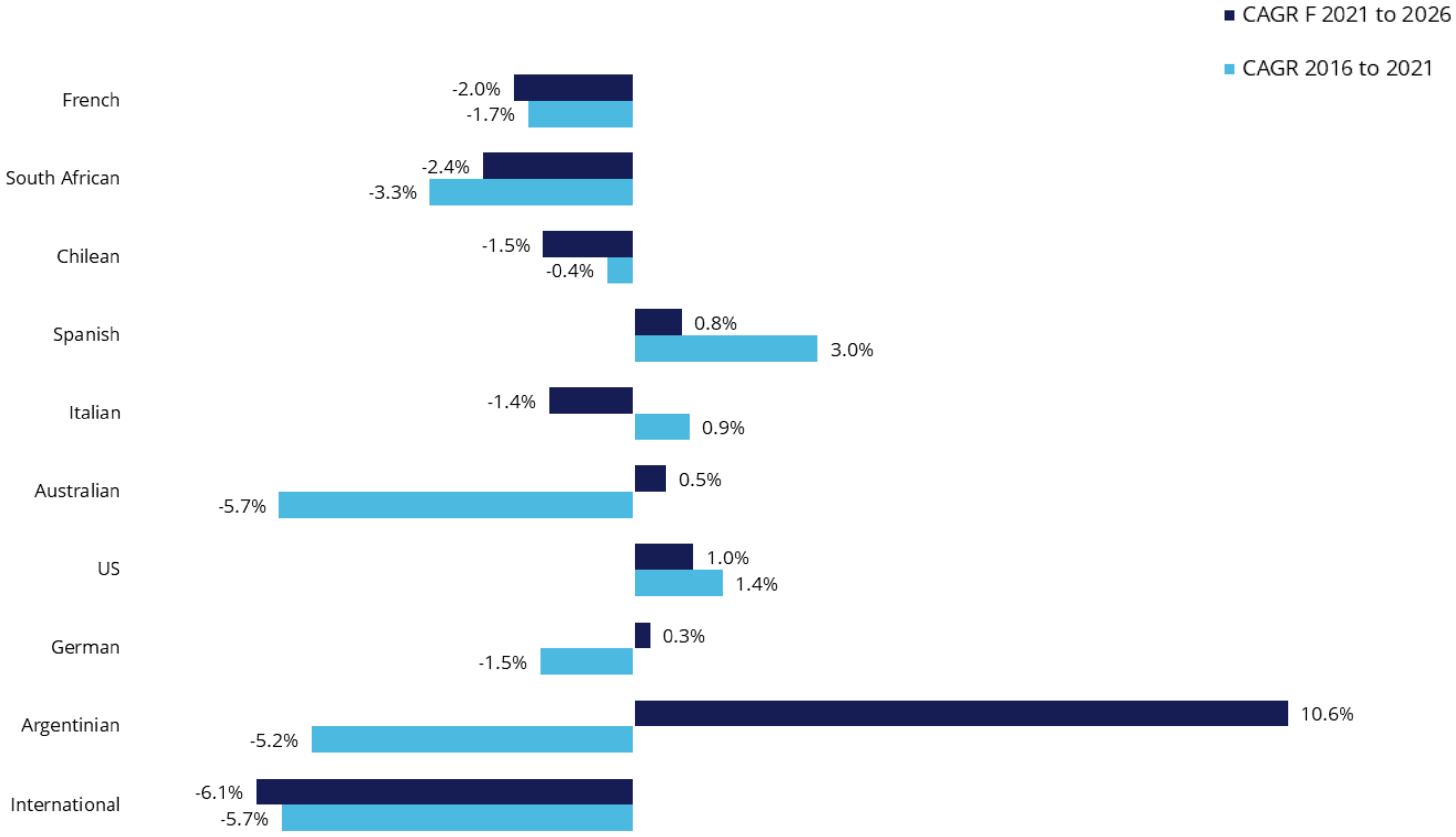
Source: IWSR

Still wine forecasts by origin

Volume leaders France and South Africa will continue their decline, while Australia and Argentina are expected to bounce back over the next five years

Historic and forecast volume growth by country of origin

Five-year CAGR %



*International refers to wine where grapes are from multiple countries of origin

Source: IWSR

Still wine retail price by origin

Retail prices for all countries of origin have witnessed consistent growth in the past five years, in a low inflation environment, and a steady rise is expected in the year to come

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2021 (US$)	CAGR 16-21	CAGR F 21-26
	Total	**6.05**	**3.7%**	**1.1%**
1	**French**	**4.96**	**3.9%**	**0.4%**
2	**South African**	**4.54**	**3.9%**	**0.8%**
3	**Chilean**	**7.71**	**4.3%**	**0.5%**
4	**Spanish**	**6.47**	**1.7%**	**0.6%**
5	**Italian**	**8.04**	**3.6%**	**1.7%**
6	**Australian**	**7.26**	**4.4%**	**1.8%**
7	**US**	**5.81**	**3.1%**	**0.1%**
8	**German**	**6.36**	**2.2%**	**0.3%**
9	**Argentinian**	**9.20**	**2.3%**	**0.5%**
10	**International**	**4.81**	**7.7%**	**1.0%**

*International refers to wine where grapes are from multiple countries of origin

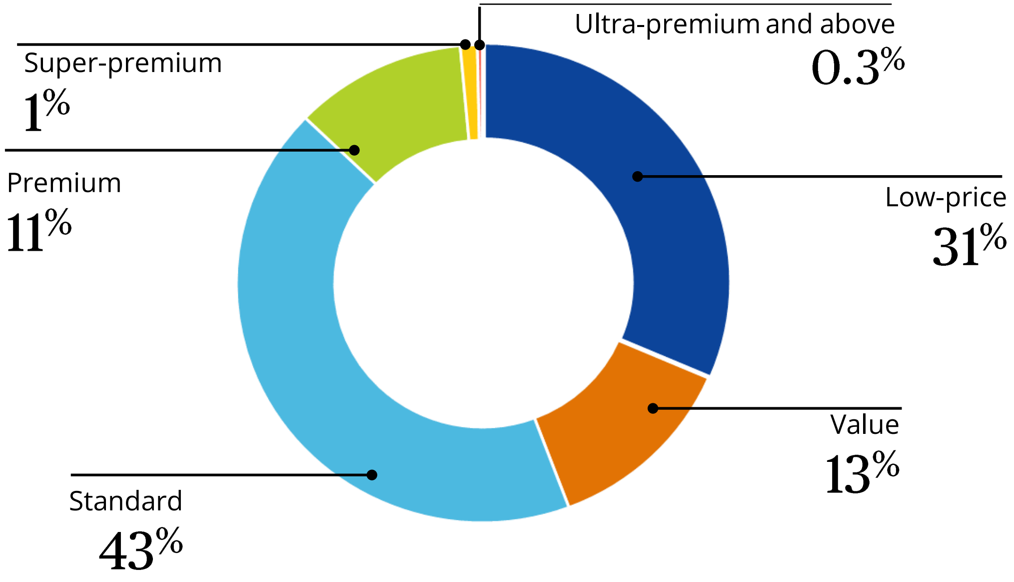
Source: IWSR

Still wine by price band

Within the Dutch market the biggest share is taken by wines priced just under €7.50. Premium and above represents a relatively small fraction of volumes sold

Still wine by price band

% of purchases that fall within the categories below



Still wine volumes by price band

'000s 9-litre cases

	2020	2021
Low-Price (Under €2.50)	**11,392.80**	**10,732.85**
Value (€2.50 to €3.49)	**4,515.95**	**4,372.40**
Standard (€3.50 to €7.49)	**14,947.50**	**14,641.75**
Premium (€7.50 to €14.99)	**3,867.65**	**3,872.00**
Super Premium (€15.00 to €24.99)	**377.10**	**381.25**
Ultra Premium and Above (€25.00 and Over)	**107.00**	**110.75**

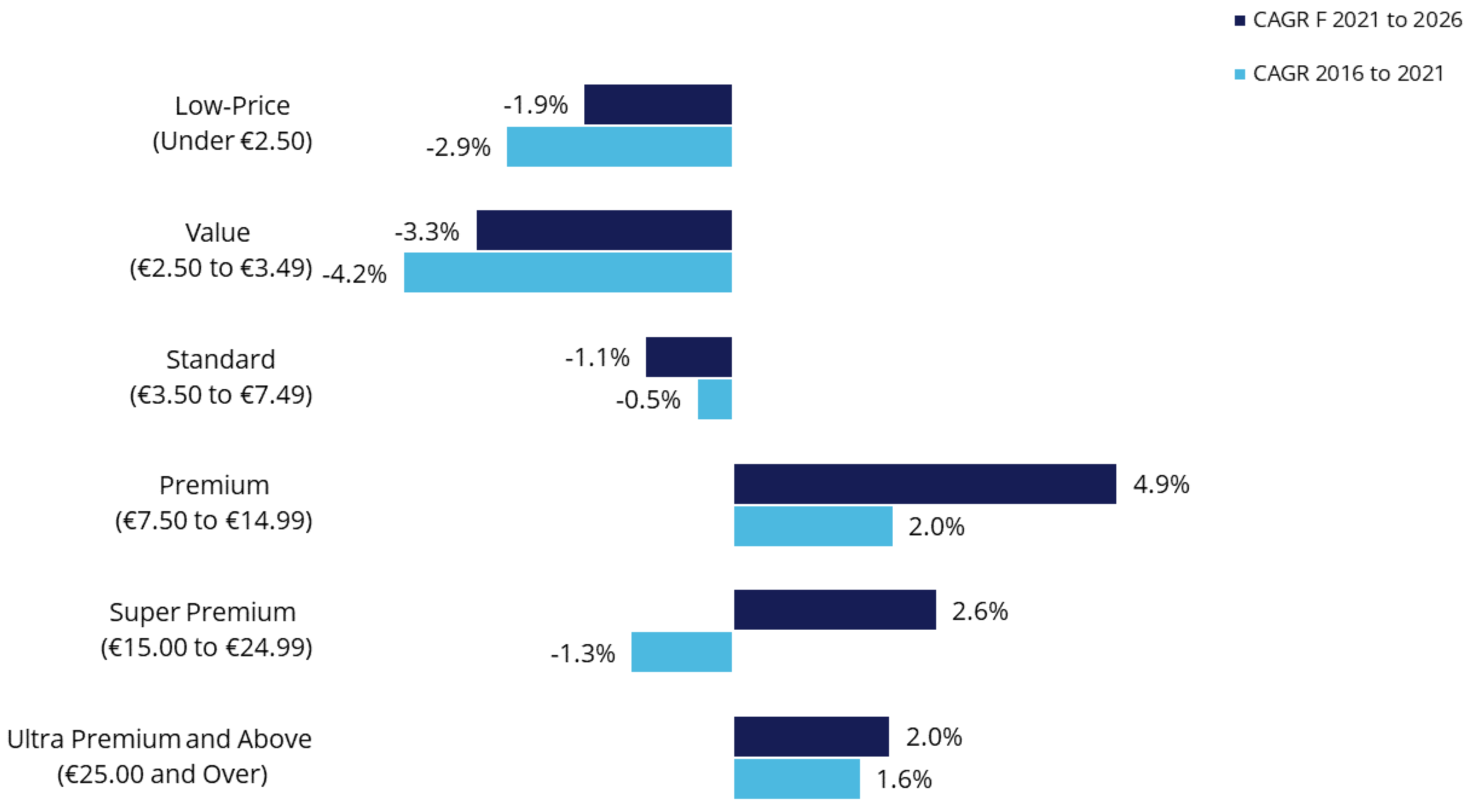
Source: IWSR

Still wine growth by price band

Although almost 90% of wine is sold at €7.50 and below, this percentage is decreasing. The volume accounted for by premium and higher price bands is forecast to grow

Historic and forecast volume growth by price band

Five-year CAGR %



Source: IWSR

Still wine consumption per capita

The Netherlands is ranked just outside the top 20 for per capita consumption. It has had a gradual decline and is projected to see a sharp fall in years to come

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2020	2021	CAGR 16-21	CAGR 20-21
1	Portugal	38.85	43.00	-1.4%	10.7%
2	Italy	42.75	41.77	-1.3%	-2.1%
3	Montenegro	38.63	41.77	-1.6%	7.9%
4	Slovenia	37.71	37.63	-2.7%	-0.3%
5	Switzerland	36.56	36.14	-0.7%	-0.6%
6	France	37.44	35.75	-4.1%	-4.1%
7	Denmark	33.08	33.37	0.5%	1.4%
8	Hungary	30.95	31.52	-0.2%	1.6%
9	Austria	31.02	30.93	-0.6%	0.0%
10	US Virgin Islands	26.36	28.15	-1.8%	6.7%
11	Greece	25.46	27.95	-3.2%	9.5%
12	Germany	28.57	27.78	-0.8%	-3.0%
13	Turks and Caicos	23.14	27.56	-2.9%	21.7%
14	St. Barths	21.50	26.57	n/a	24.6%
15	Uruguay	26.99	25.62	0.7%	-4.5%
16	Argentina	28.71	25.14	-2.1%	-11.5%
17	Sweden	24.46	23.83	1.5%	-1.9%
18	Romania	24.01	23.73	2.3%	-1.4%
19	Slovakia	22.77	22.95	-0.8%	0.7%
20	Spain	20.00	22.31	-1.1%	11.7%
21	Netherlands	22.81	21.98	-1.5%	-3.1%

n/a = tracking unavailable for this wave
Source: IWSR

Sparkling wine volumes by origin

Italian wine remains the most popular country of origin for sparkling wine in the Dutch market with over half of the market

Total sparkling wine volumes and market share by origin

'000s 9-litre cases

		2020	2021	Market Share
	Total	1,934.75	2,072.80	
1	Italian	1,088.25	1,137.65	55%
2	Spanish	286.20	360.40	17%
3	French	282.20	338.50	16%
4	International	141.90	103.50	5%
5	German	60.00	55.75	3%
6	Australian	19.50	17.50	1%
7	South African	15.75	16.50	1%
8	Belg / Lux	13.00	14.10	1%
9	Chilean	7.25	7.00	0%
10	Argentinian	6.25	6.25	0%

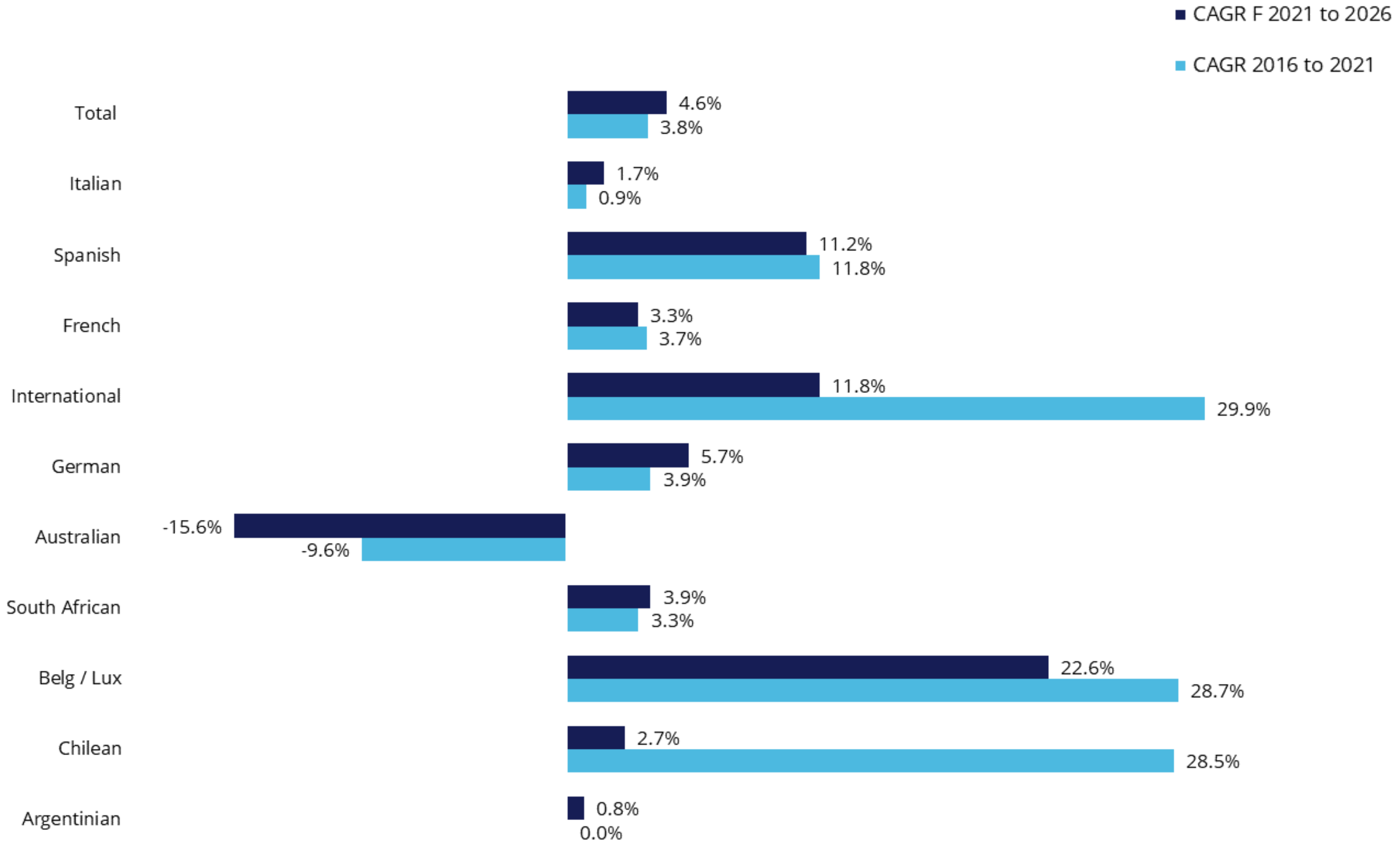
Source: IWSR

Sparkling wine growth by country of origin

Italian, Spanish and French sparkling wine saw a consistent increase from 2016 to 2021, with the growth rate for market leader Italy forecast to almost double by 2026. Spain is expected have the strongest growth rate among the top three countries of origin by market share.

Historic and forecast growth by country of origin

Five-year CAGR %



Source: IWSR

Sparkling wine retail price by origin

Despite French wine already being most expensive, it had high growth in recent years and is expected to continue to grow in the future

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2021 (US$)	CAGR 16-21	CAGR F 21-26
	Total	12.30	3.8%	1.2%
1	Italian	7.00	5.0%	1.8%
2	Spanish	9.90	-1.3%	-0.2%
3	French	35.49	4.0%	2.0%
4	International	7.08	-0.3%	0.0%
5	German	5.66	0.0%	1.8%
6	Australian	11.67	0.5%	0.0%
7	South African	13.37	6.4%	2.4%
8	Belg / Lux	9.53	-5.6%	-1.6%
9	Chilean	8.00	-0.3%	-0.1%
10	Argentinian	21.54	6.5%	-0.3%

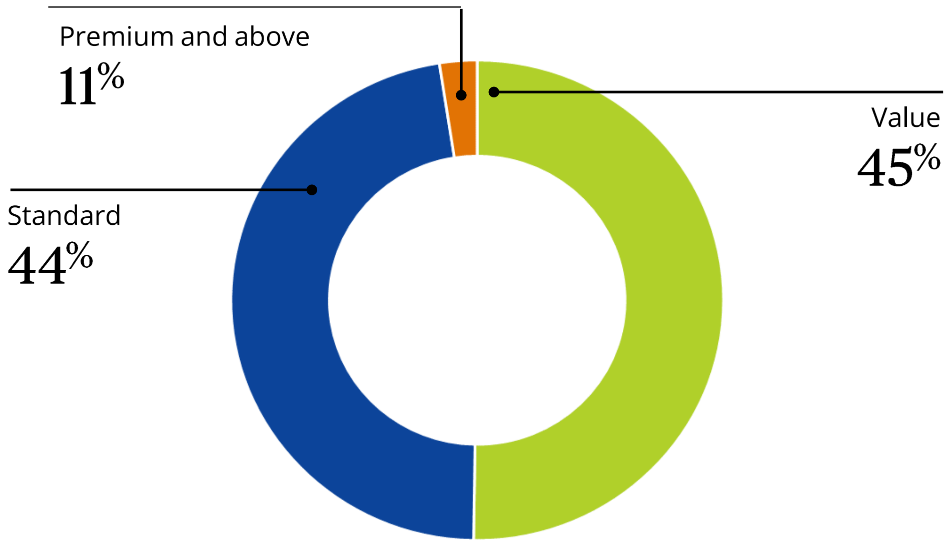
Source: IWSR

Other sparkling wine by price band

Almost 90% of sparkling wine is sold below €14.99, a sector which has grown steadily over the past year

Sparkling wine by price brand

% of purchases that fall within the categories below



Sparkling wine volumes by price band

'000s 9-litre cases

	2020	2021
Value (Under €5.00)	893.55	905.35
Standard (€5.00 to €14.99)	786.15	852.50
Premium and Above (€15.00 and Over)	41.25	44.35

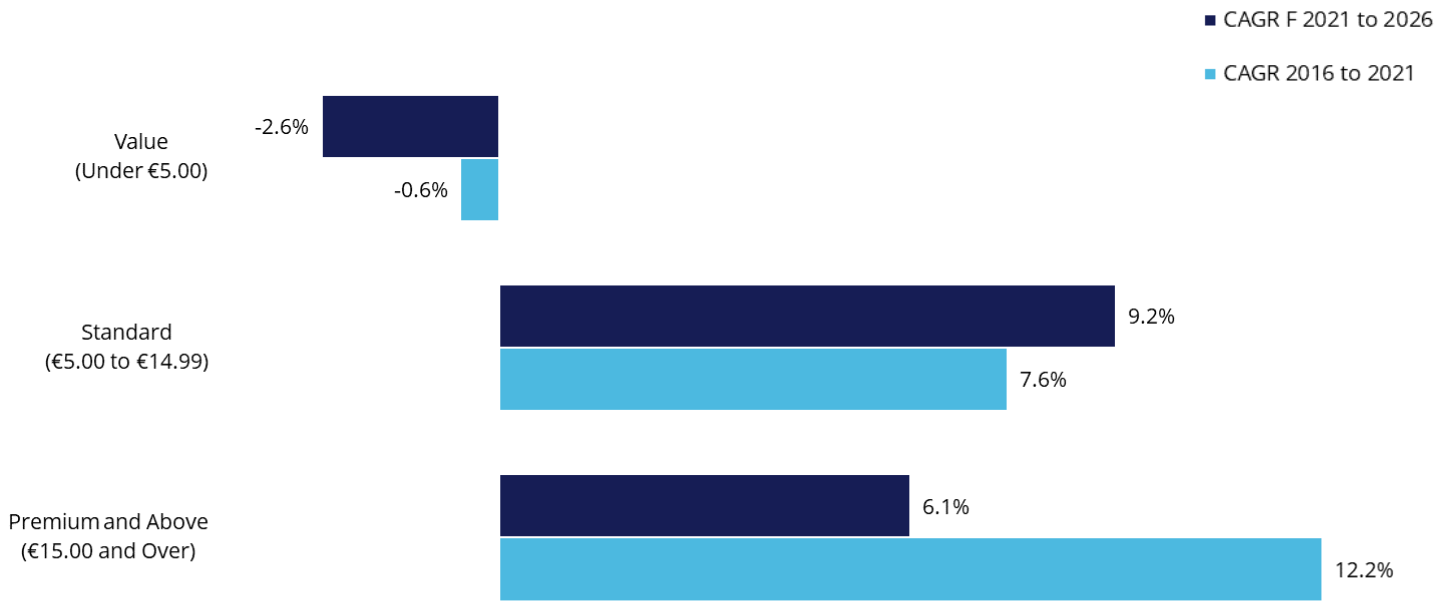
Source: IWSR

Other sparkling wine growth by price band

Wines in the standard and above price ranges recorded the highest growth between 2016 to 2021, and are projected to continue to rise in the next five years

Historic and forecast growth by price band

Five-year CAGR %



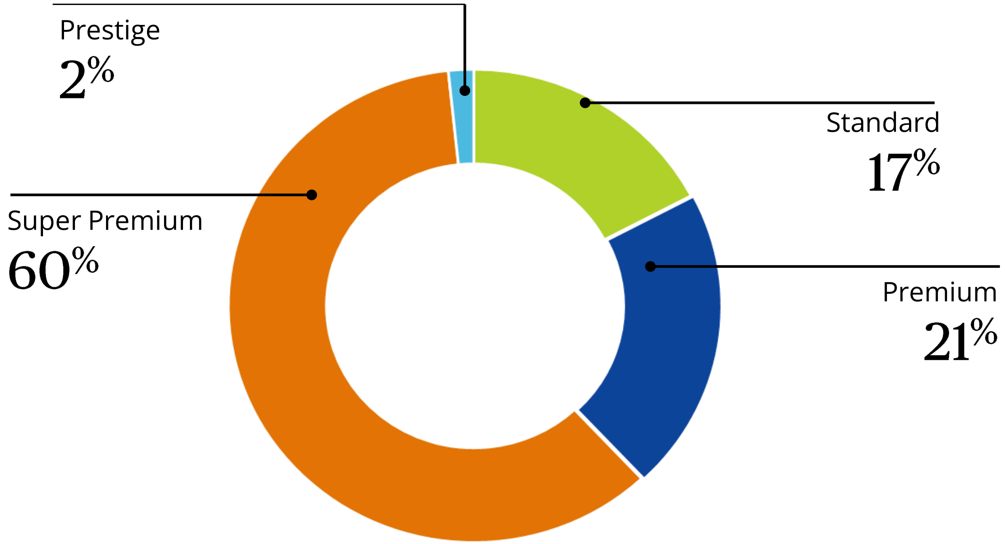
Source: IWSR

Champagne by price band

Higher-priced Champagne, between €35.00 and €99.99, accounts for the biggest volume by price brand and has been steady over the past year

Champagne by price brand

% of purchases that fall within the categories below



Champagne volumes by price band

'000s 9-litre cases

	2020	2021
Standard (Under €20.00)	26.50	39.00
Premium (€20.00 to €34.99)	37.70	46.75
Super Premium (€35.00 to €99.99)	112.50	136.00
Prestige (€100.00 to €199.99)	3.25	3.75

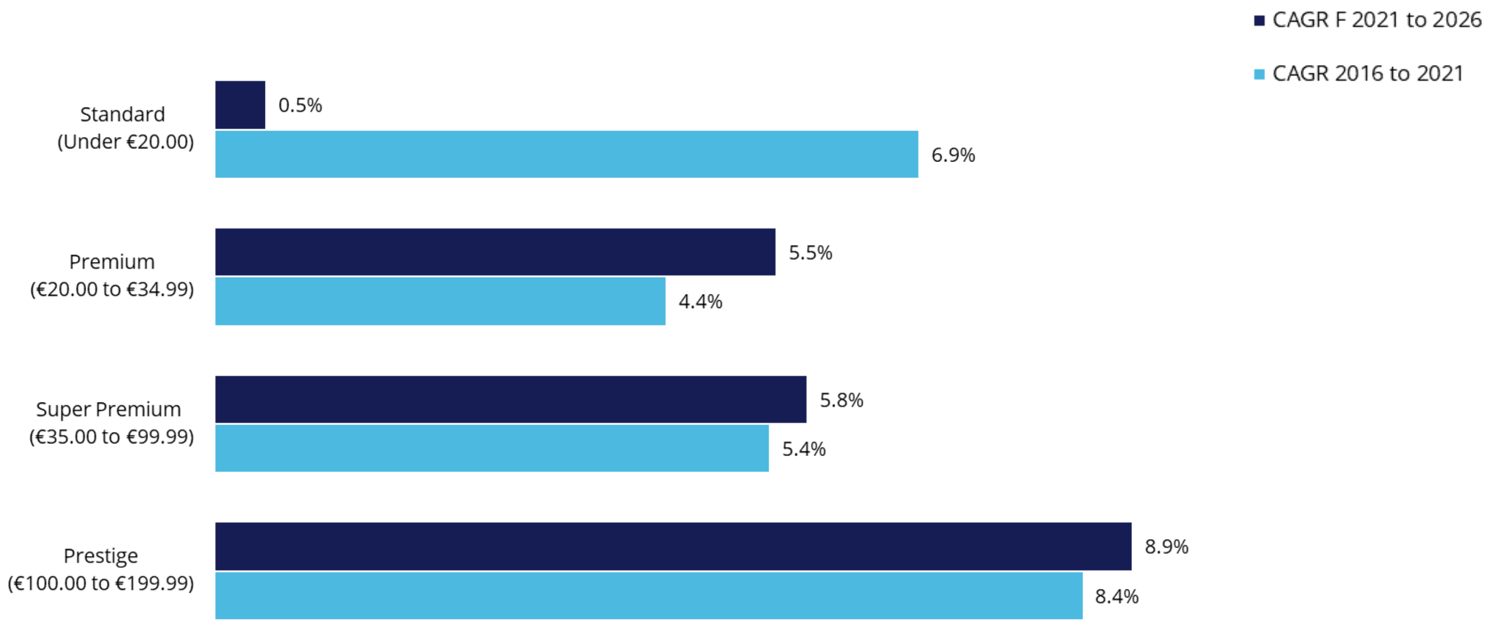
Source: IWSR

Champagne growth by price band

All price bands for Champagne have grown over the past five years and are forecast to carry on doing so until 2026, with the prestige category leading the way

Historic and forecast growth by price band

Five-year CAGR %



Source: IWSR

Sparkling wine consumption per capita

Netherlands per capita consumption of sparkling wine is fairly compared to neighbouring Belgium and Germany, who both rank within the top 10.

However, Netherlands has been experiencing growth over the past five years, a trend that is expected to continue in the coming years

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2020	2021	CAGR 16-21	CAGR 20-21
1	St. Barths	7.03	9.77	n/a	40.1%
2	Italy	7.51	7.79	2.6%	3.9%
3	Turks and Caicos	5.34	6.64	-3.8%	27.2%
4	Germany	5.53	5.57	-2.3%	0.3%
5	Lithuania	4.40	4.88	1.9%	9.7%
6	France	4.33	4.74	-1.9%	9.8%
7	Latvia	4.61	4.47	1.1%	-4.2%
8	Belgium and Luxembourg	4.01	4.28	-1.1%	7.5%
9	Martinique	3.90	4.19	-5.8%	7.8%
10	Guadeloupe	3.57	4.15	-4.3%	16.9%
11	Estonia	3.60	4.08	1.6%	12.6%
12	Austria	3.17	3.44	0.2%	8.8%
13	Sweden	3.05	3.34	10.8%	10.4%
14	Switzerland	2.93	3.23	1.7%	10.9%
15	United Kingdom	2.87	3.22	2.4%	12.4%
16	Cayman Islands	3.14	3.18	5.4%	3.4%
17	Australia	2.98	3.18	6.4%	8.4%
18	New Zealand	3.06	3.11	1.5%	3.1%
19	Czech Republic	2.56	2.90	10.0%	13.5%
20	Slovenia	2.80	2.89	3.6%	3.2%
44=	Netherlands	1.25	1.34	3.8%	7.1%

Source: IWSR

Fortified wine volumes: Current and historical

The majority of fortified wine sold in the Dutch market comes from Portugal, but this, along with Spanish fortified wine, experienced a decline in volumes between 2016 and 2021

Fortified wine volumes and market share by origin

’000s 9-litre cases

	2020	2021	CAGR 16-21	CAGR 21-26	Market Share
Total	1,918.90	1,829.50	-5.4%	-2.6%	
Portuguese	1,015.00	965.40	-2.7%	n/a	53%
Spanish	643.90	612.50	-9.8%	n/a	33%

Source: IWSR

n/a = tracking unavailable for this wave

Market Demographics

Netherlands Wine Landscapes

2022

Market demographics

Key takeaways

1. Wine drinking population declines

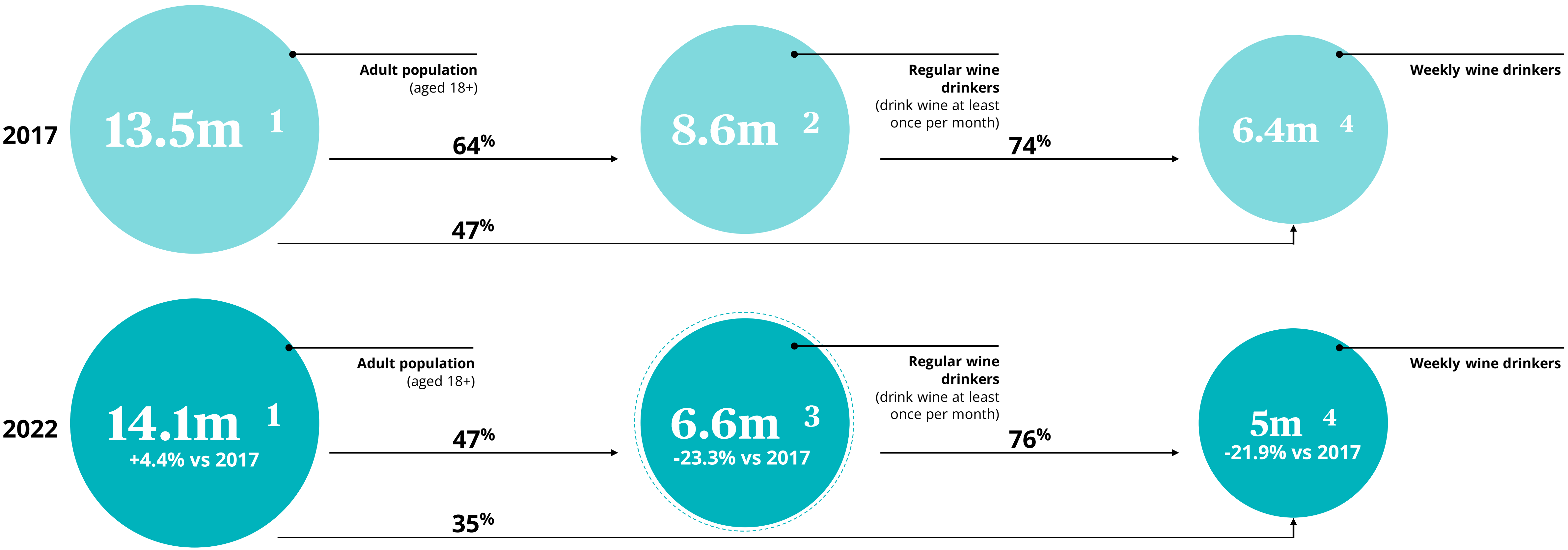
The Netherlands has seen the size of its wine-drinking population decline despite its adult population increasing by 5%. The number of monthly and weekly drinkers has shrunk by around a quarter and a fifth respectively.

2. Wine drinkers are increasingly female and older

Since 2019, a greater proportion of regular wine drinkers are women and older, with those aged 55 and above now making up almost half of all regular wine drinkers.

Dutch regular wine drinkers

Since 2017 the Dutch wine market has lost almost a quarter of its monthly wine drinking population, and a fifth of its weekly wine drinkers

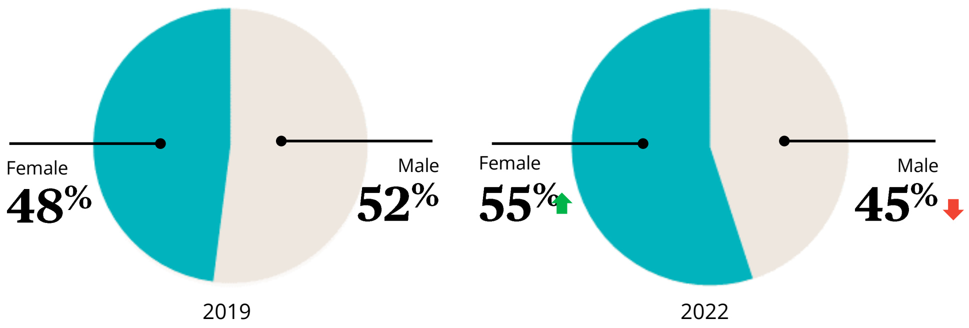


1 Statistics ND - http://statline.cbs.nl/
2 Wine Intelligence online calibration study with YouGov, October 2016 (n = 1,000) Dutch adults. Wine=still light wine (red, white, rosé)
3 Wine Intelligence online calibration study with YouGov, rolling average of September 2019 and February 2022 (n ≥ 1,000) Dutch adults. Wine=still light wine (red, white, rosé)
4 Wine Intelligence, Vinitrac® Netherlands Mar '17 & Apr '22 (n ≥ 1,000) Dutch regular wine drinkers

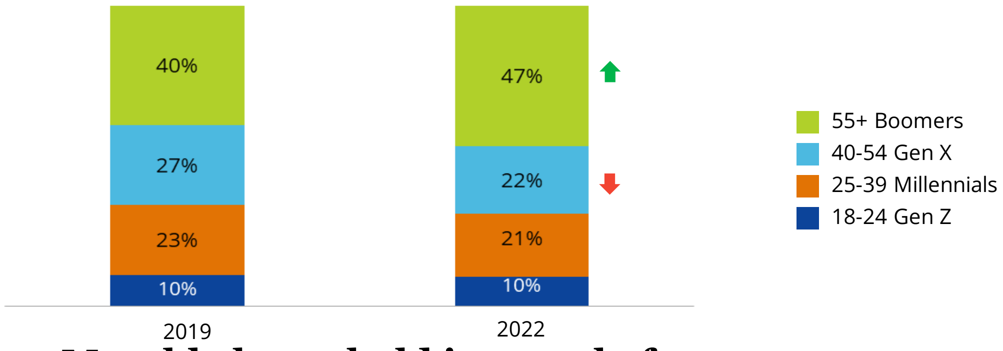
Demographics of regular wine drinkers

Regular wine drinkers in the Dutch market are increasingly female, and almost half of all regular wine drinkers are aged 55 and above

Gender



Generation cohorts



Regions

	2019	2022	Tracking
Western Netherlands	51%	48%	➡
Northern Netherlands	10%	13%	⬆
Eastern Netherlands	17%	15%	➡
Southern Netherlands	22%	24%	➡

Monthly household income before tax

	2019	2022	Tracking
Less than € 12.000	7%	4%	⬇
€ 12.000 to € 23.999	12%	12%	➡
€ 24.000 to € 35.999	19%	20%	➡
€ 36.000 to € 49.999	18%	23%	⬆
More than € 50.000	26%	23%	➡
I would prefer not to say	19%	18%	➡

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

Drinking Repertoire

Netherlands Wine Landscapes

2022

Drinking repertoire

Key takeaways

1. Lower consumption incidences for leading alcohol categories

Both red and white wine, as well as beer, have significantly lower purchase incidences among regular wine drinkers.

2. Popular varietals have a lower consumption incidence

As regular wine drinkers are drinking less wine than in previous years, the consumption incidences of leading varietals has declined for both red and white wine.

Drinking repertoire

Alcoholic beverage consumption remains stable for most categories, though with a notable drop for beer of 9% since 2019.

White and red wine also had sustained declines in consumption, both in the long and short term.

Alcoholic beverage repertoire: Tracking

% who have drunk the following beverages in the past 12 months
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	White wine	82%	84%	80%	→	↓
2	Red wine	75%	74%	71%	↓	→
3	Beer	70%	67%	61%	↓	↓
4	Rosé wine	47%	50%	47%	→	→
5	Liqueurs	30%	32%	34%	→	→
6	Prosecco	36%	35%	33%	→	→
7	Whisky / Whiskey	29%	29%	30%	→	→
8	Craft beer	34%	31%	29%	↓	→
9	Champagne (French Champagne)	32%	29%	28%	↓	→
10	Cocktails	24%	25%	25%	→	→
11=	Rum	22%	23%	20%	→	→
11=	Vodka	23%	24%	20%	→	↓
13	Port	24%	19%	19%	↓	→
14	Cava	20%	20%	18%	→	→
15	Gin	17%	19%	16%	→	↓

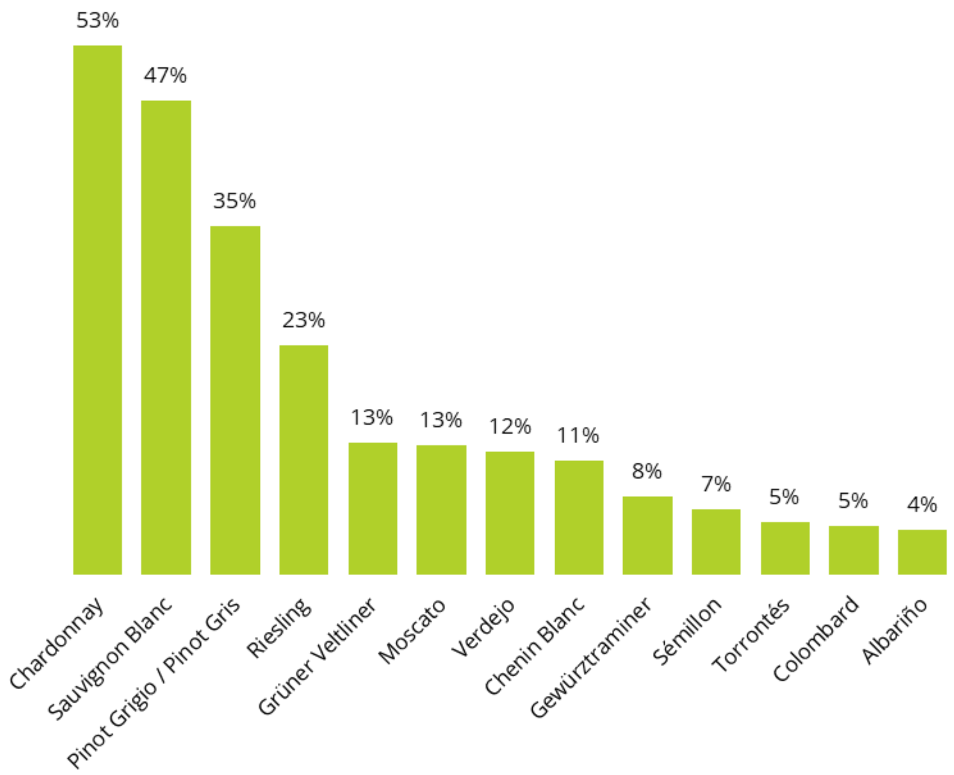
=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

White varietal consumption

Leading varietals Chardonnay and Sauvignon Blanc have shown a significant decline in popularity as regular wine drinkers consume less wine overall

White varietal consumption

% who have drunk the following varietals or wine types in the past six months
Base = All Dutch regular wine drinkers (n=1,009)



White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Chardonnay	57%	58%	53%	↓	↓
2	Sauvignon Blanc	50%	54%	47%	→	↓
3	Pinot Grigio / Pinot Gris	33%	38%	35%	→	→
4	Riesling	24%	21%	23%	→	→
5=	Grüner Veltliner	12%	13%	13%	→	→
5=	Moscato	13%	14%	13%	→	→
7	Verdejo	11%	14%	12%	→	→
8	Chenin Blanc	12%	12%	11%	→	→
9	Gewürztraminer	8%	7%	8%	→	→
10	Sémillon	6%	5%	7%	→	→
11=	Torrontés	4%	4%	5%	→	→
11=	Colombard	5%	4%	5%	→	→
13	Albariño	4%	5%	4%	→	→

Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

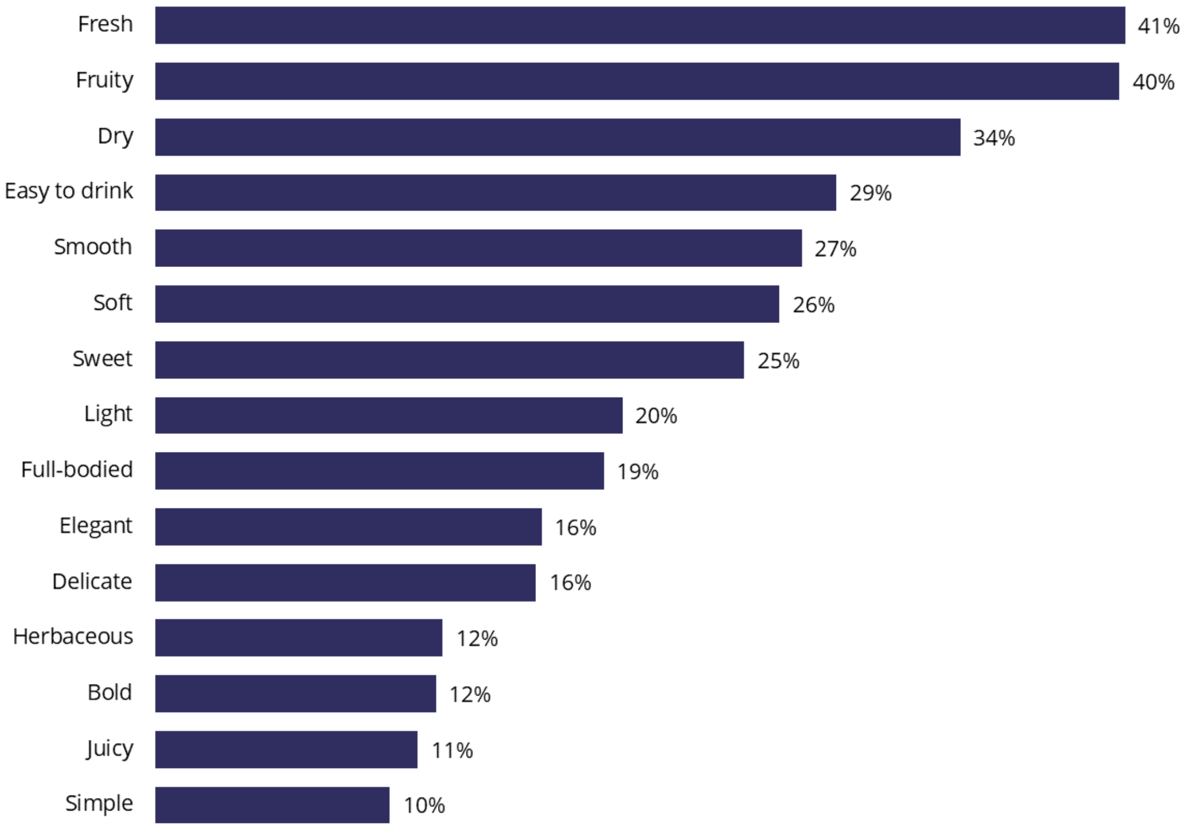
HOT TOPIC

White wine attributes

Almost half of Dutch regular wine drinkers said their ideal white wine profile features a combination of fresh and fruity characteristics

Ideal white wine attributes: Top 15

% who select each description for their ideal white wine
Base = All Dutch regular wine drinkers (n=1,009)



Demographic insights

- Significantly more Gen Z and Millennial drinkers said their ideal white wine would be sweet, juicy and creamy, while fewer of them said their ideal wine would be dry compared to regular wine drinkers as a whole
- Gen Zs were more likely to say that their ideal wine would be light, crisp and complex

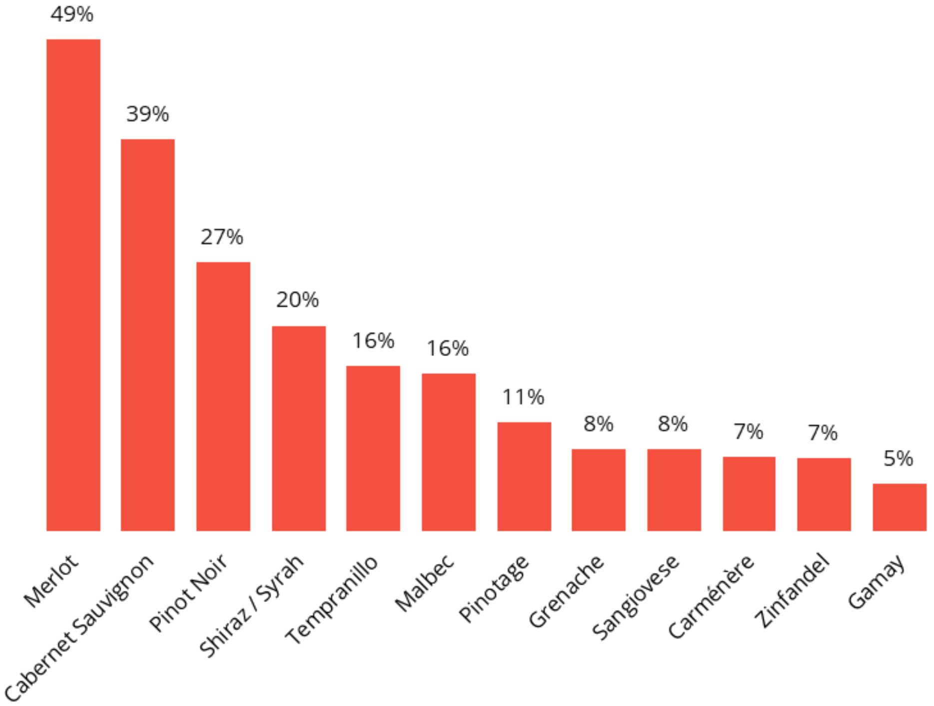
Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Red varietal consumption

The top four red varietals have declining consumption, which is attributed to smaller numbers of regular wine drinkers consuming less wine overall

Red varietal consumption

% who have drunk the following varietals or wine types in the past six months
Base = All Dutch regular wine drinkers (n=1,009)



Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Merlot	**54%**	**54%**	**49%**	↓	↓
2	Cabernet Sauvignon	**44%**	**43%**	**39%**	↓	↓
3	Pinot Noir	**32%**	**33%**	**27%**	↓	↓
4	Shiraz / Syrah	**24%**	**24%**	**20%**	↓	↓
5=	Tempranillo	**17%**	**19%**	**16%**	→	→
5=	Malbec	**17%**	**19%**	**16%**	→	↓
7	Pinotage	**11%**	**10%**	**11%**	→	→
8=	Grenache	**8%**	**7%**	**8%**	→	→
8=	Sangiovese	**8%**	**8%**	**8%**	→	→
10=	Carménère	**7%**	**8%**	**7%**	→	→
10=	Zinfandel	**8%**	**6%**	**7%**	→	→
12	Gamay	**5%**	**4%**	**5%**	→	→

Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

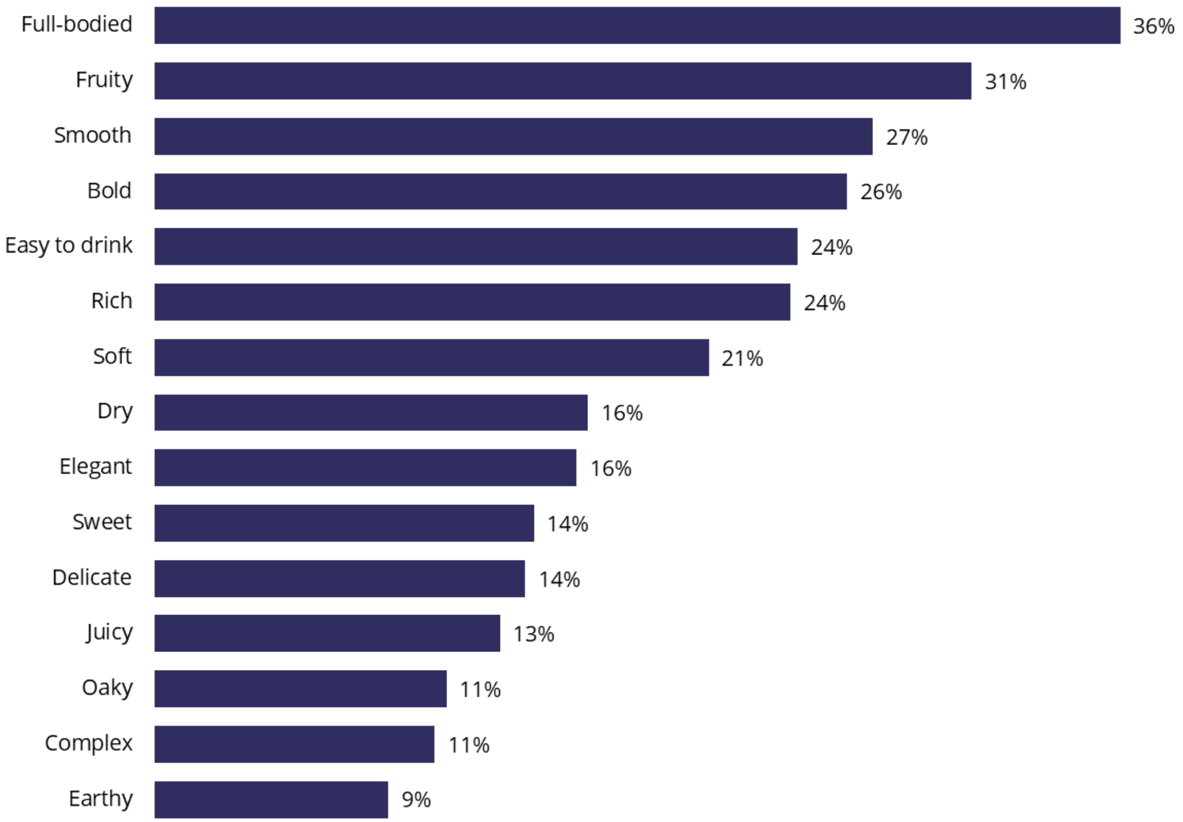
HOT TOPIC

Red wine attributes

Full-bodied, fruity and smooth are the top three preferred red wine attributes

Ideal red wine attributes: Top 15

% who select each description for their ideal red wine
Base = All Dutch regular wine drinkers (n=1,009)



Demographic insights

- Millennial wine drinkers were less likely to describe their ideal red wine as full-bodied and easy-to-drink when compared to all regular wine drinkers. Instead greater numbers of them were in favour of a wine that was sweet, earthy and savoury
- Significantly greater numbers of Boomer wine drinkers said their ideal white wine would be full-bodied, easy-to-drink, bold and dry

Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

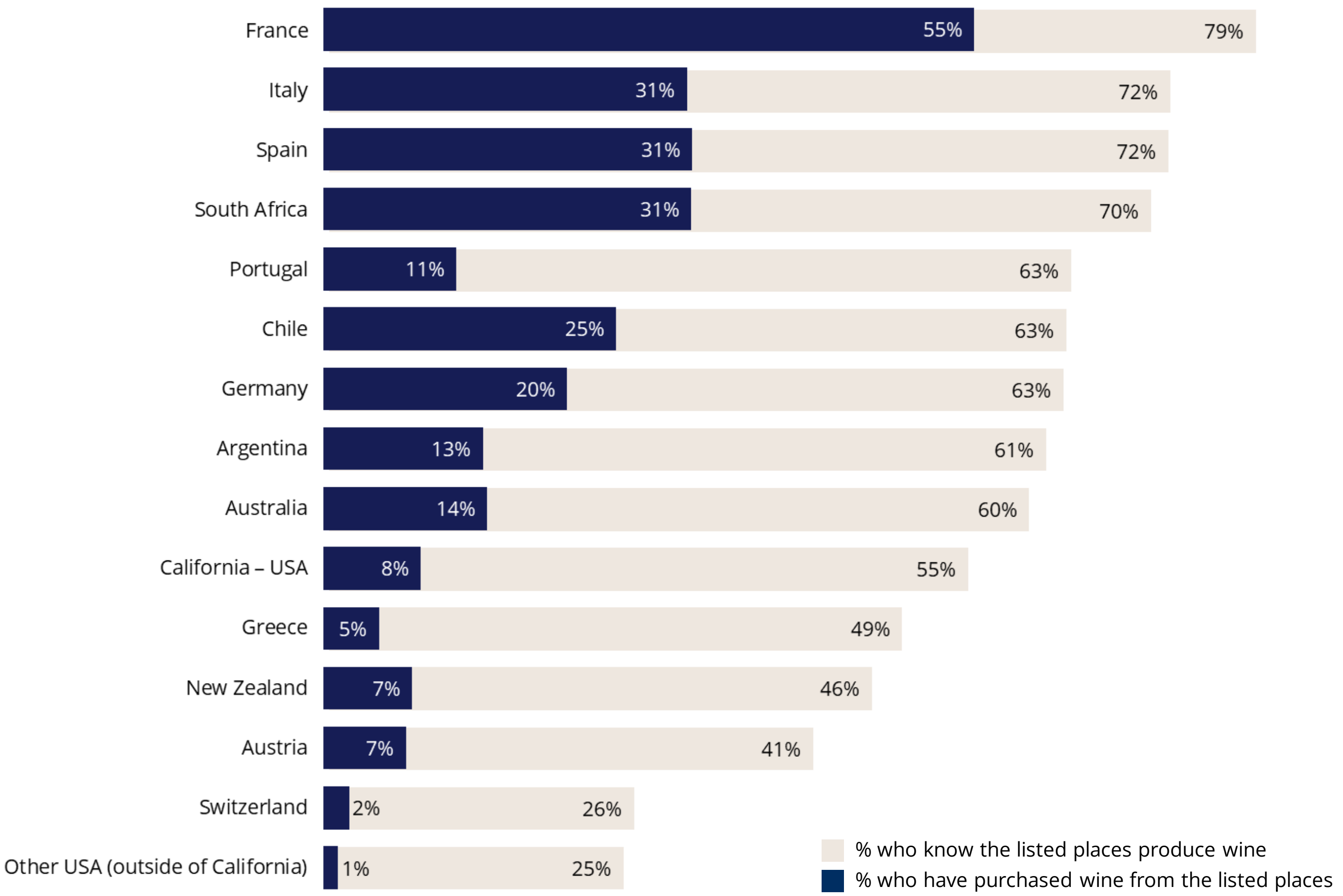
Country of origin consumption / awareness

France scores highest, with 79% of Dutch wine drinkers aware of it as a country of origin and 55% having made a purchase in the last six months

Italy, Spain and South Africa score very close to each other

Country of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following places
Base = All Dutch regular wine drinkers (n=1,009)



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Country of origin awareness

Spain, South Africa and Chile have seen significant long-term declines in their awareness incidences

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	France	81%	81%	79%	→	→
2=	Italy	73%	74%	72%	→	→
2=	Spain	75%	74%	72%	↓	→
4	South Africa	74%	71%	70%	↓	→
5=	Portugal	62%	60%	63%	→	→
5=	Chile	68%	67%	63%	↓	↓
5=	Germany	61%	61%	63%	→	→
8	Argentina	63%	60%	61%	→	→
9	Australia	61%	61%	60%	→	→
10	California – USA	55%	54%	55%	→	→
11	Greece	n/a	49%	49%	n/a	→
12	New Zealand	47%	48%	46%	→	→
13	Austria	n/a	37%	41%	n/a	↑
14	Switzerland	22%	24%	26%	↑	→
15	Other USA (outside of California)	28%	28%	25%	→	→

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Country of origin consumption

For the most part, the consumption levels for the top 10 countries of origin have taken a dramatic decline in both the short-term and long-term run, with those outside the top 10 more stable

Q: What do market experts say?

"We're seeing [growing] interest in Central and Eastern Europe ."

Wine importer, Netherlands

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	France	59%	57%	55%	↓	→
2=	Spain	35%	35%	31%	↓	↓
2=	South Africa	40%	35%	31%	↓	↓
2=	Italy	32%	34%	31%	→	↓
5	Chile	31%	29%	25%	↓	↓
6	Germany	22%	20%	20%	→	→
7	Australia	20%	18%	14%	↓	↓
8	Argentina	18%	15%	13%	↓	→
9	Portugal	12%	12%	11%	→	→
10	California – USA	10%	8%	8%	→	→
11=	New Zealand	8%	7%	7%	→	→
11=	Austria	n/a	7%	7%	n/a	→
13	Greece	n/a	4%	5%	n/a	→
14	Switzerland	2%	1%	2%	→	↑
15=	Other USA (outside of California)	1%	1%	1%	→	→

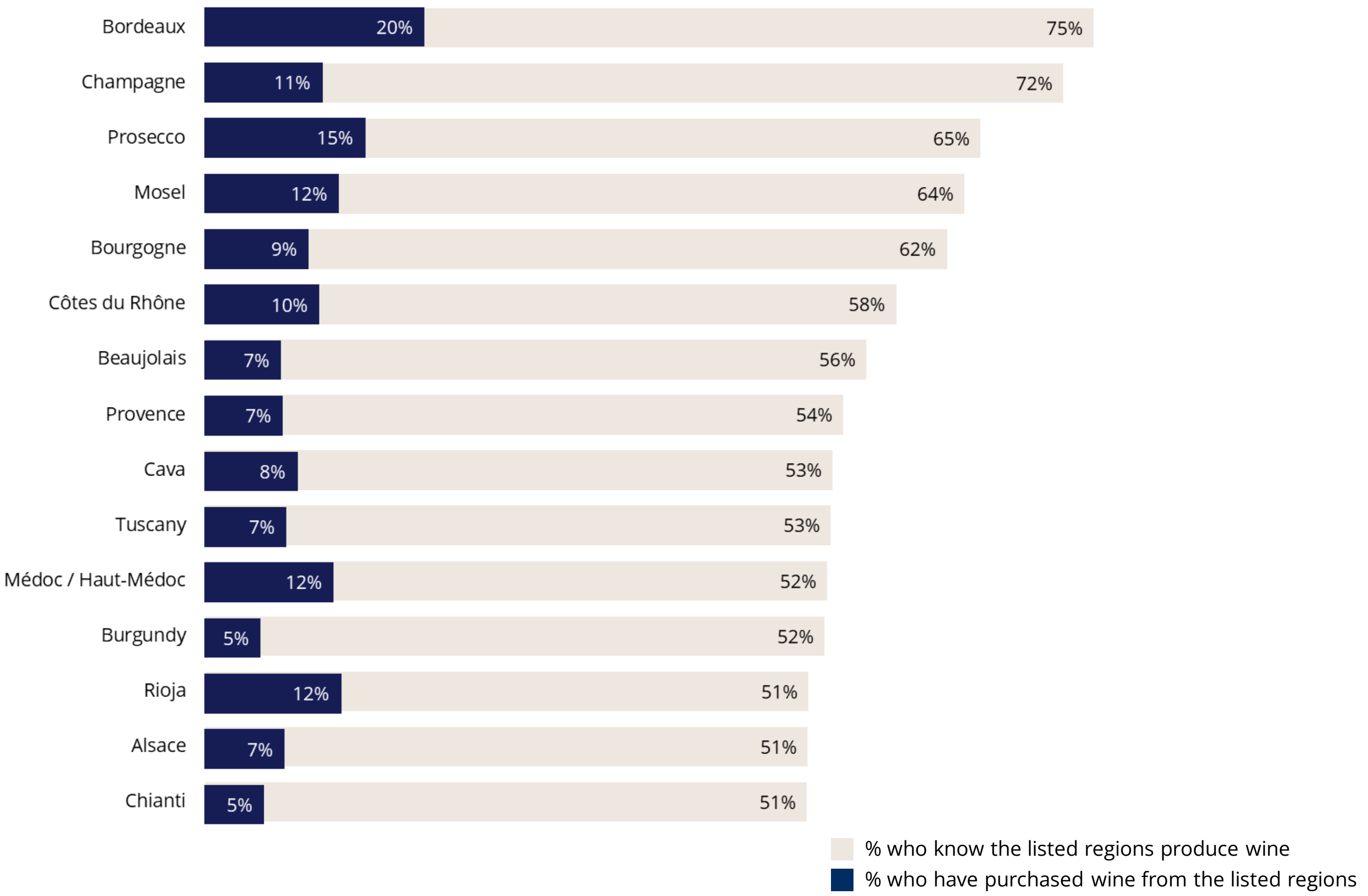
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Region of origin consumption / awareness

European region of origins dominate the list with French regions having most of the highest awareness and purchase incidences

Region of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following regions
Base = All Dutch regular wine drinkers (n=1,009)



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Region of origin awareness

Most regions have maintained stable awareness levels among Dutch regular wine drinkers, though Bordeaux, the most popular, has seen a steep drop

Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Bordeaux	**82%**	**81%**	**75%**	↓	↓
2	Champagne	**75%**	**74%**	**72%**	→	→
3	Prosecco	**67%**	**68%**	**65%**	→	→
4	Mosel	**68%**	**66%**	**64%**	↓	→
5	Bourgogne	**71%**	**69%**	**62%**	↓	↓
6	Côtes du Rhône	**63%**	**62%**	**58%**	↓	→
7	Beaujolais	**57%**	**55%**	**56%**	→	→
8	Provence	**57%**	**57%**	**54%**	→	→
9=	Cava	**54%**	**56%**	**53%**	→	→
9=	Tuscany	**57%**	**58%**	**53%**	↓	↓
11=	Médoc / Haut-Médoc	**54%**	**52%**	**52%**	→	→
11=	Burgundy	**54%**	**54%**	**52%**	→	→
13=	Rioja	**53%**	**54%**	**51%**	→	→
13=	Alsace	**52%**	**50%**	**51%**	→	→
13=	Chianti	**51%**	**51%**	**51%**	→	→

Q: What do market experts say?

"We see ever-decreasing sales of Bordeaux reds, because people are far more open-minded and not necessarily sticking to one region."

Wine buyer, Netherlands

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Region of origin consumption

Bordeaux's consumption level has had a steep fall since 2019, with Prosecco, Côtes du Rhône and Cava also seeing declines

Region of origin consumption: Top 15, tracking

% who have bought wine from the following wine-producing regions in the past 3 months
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Bordeaux	25%	25%	20%	↓	↓
2	Prosecco	17%	18%	15%	→	↓
3=	Rioja	15%	14%	12%	→	→
3=	Mosel	13%	11%	12%	→	→
3=	Médoc / Haut-Médoc	11%	10%	12%	→	→
6	Champagne	12%	12%	11%	→	→
7	Côtes du Rhône	15%	12%	10%	↓	→
8	Bourgogne	12%	11%	9%	→	→
9=	Cava	10%	12%	8%	→	↓
9=	Chablis	9%	7%	8%	→	→
9=	Stellenbosch	8%	8%	8%	→	→
12=	Tuscany	9%	9%	7%	→	→
12=	Alsace	6%	7%	7%	→	→
12=	Provence	7%	7%	7%	→	→
12=	Beaujolais	8%	7%	7%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Wine-Buying Behaviours

Netherlands Wine Landscapes

2022

Wine-buying behaviours

Key takeaways

1. Evidence of the Dutch wine market premiumising

Across almost all occasions in both the off-trade and on-trade, the amount typically spent by Dutch regular wine drinkers has increased significantly since 2019.

2. Dutch drinkers are moving away from the lowest-priced wines

Significantly fewer wine drinkers are purchasing wine at lower price points than in previous years.

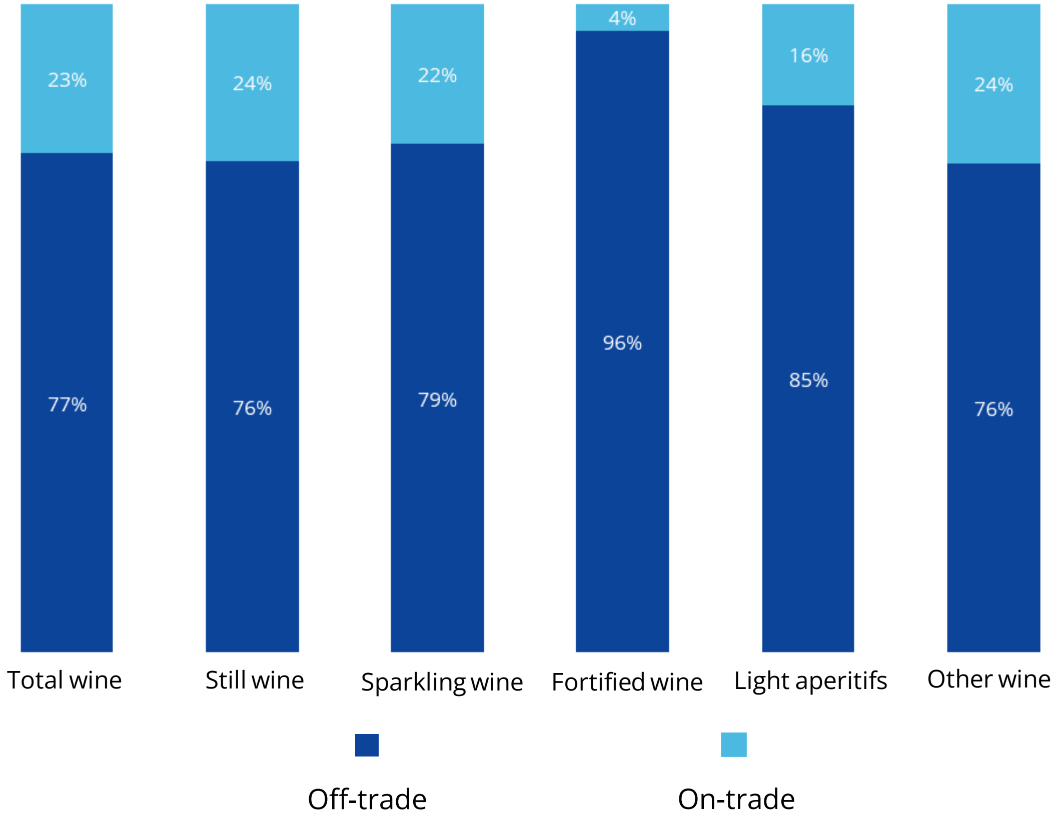
3. The on-trade is yet to recover from the pandemic

Purchase incidences among regular wine drinkers in the on-trade are yet to reach their 2019 levels across all on-trade settings.

Off- vs on-trade consumption

Around a quarter of total wine volume is in the off-trade and this is roughly even across most wine sub-categories

Share of consumption by volume



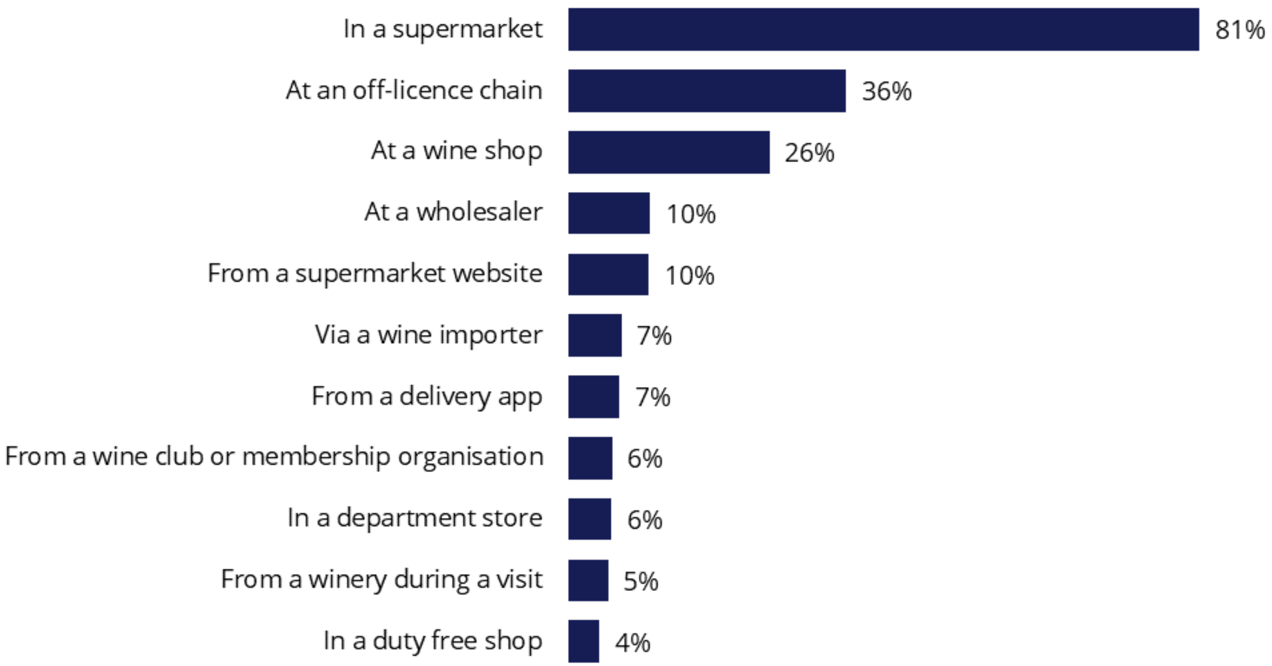
Source: IWSR

Wine-buying channel usage

The prevalence of supermarkets as the preferred wine-buying channel hasn't dwindled, with eight in 10 consumers purchasing wine there

Wine-buying channel usage: Top 11

% who have bought wine from the following channels in the past six months
Base = All Dutch regular wine drinkers (n=1,009)



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Wine-buying channel usage

Off-licence chains have seen a 10% decrease in use between 2019 and 2022, because of the pandemic. The number of online wine shoppers increased to 18%.

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	In a supermarket	84%	81%	81%	→	→
2	At an off-licence chain	40%	41%	36%	↓	↓
3	At a wine shop	24%	27%	26%	→	→
4=	At a wholesaler	10%	10%	10%	→	→
4=	From a supermarket website	n/a	9%	10%	n/a	→
6=	Via a wine importer	5%	6%	7%	→	→
6=	From a delivery app	n/a	5%	7%	n/a	→
8=	From a wine club or membership organisatior	4%	4%	6%	↑	→
8=	In a department store	7%	5%	6%	→	→
10	From a winery during a visit	n/a	4%	5%	n/a	→
11=	In a duty free shop	4%	2%	4%	→	↑

18% are online wine buyers vs **15%** in 2021

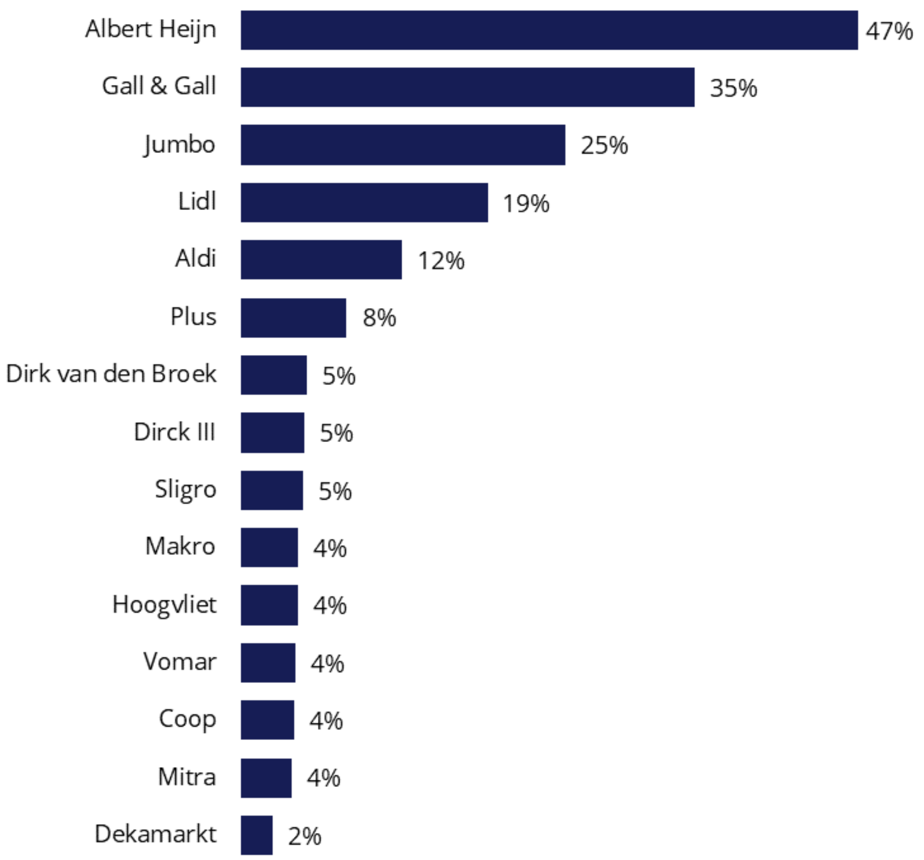
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Wine-buying retailer usage

Reflecting the general trend in channel usage, the most popular retailers are mostly larger supermarket chains such as Albert Heijn, Jumbo and the German discount chains Lidl and Aldi. Specialist wine and spirits retailer Gall & Gall is a notable exception.

Wine-buying retailer usage: Top 15

% who mainly use the following retailers to buy wine
Base = All Dutch regular wine drinkers (n=1,009)



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Wine-buying retailer usage

Most retailers have kept a consistent penetration rate from Dutch regular wine drinkers, but Lidl was one which experienced a big drop from pre-pandemic levels

Wine-buying retailer usage: Tracking

% who mainly use the following retailers to buy wine
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Albert Heijn	50%	49%	47%	→	→
2	Gall & Gall	37%	39%	35%	→	↓
3	Jumbo	25%	26%	25%	→	→
4	Lidl	23%	24%	19%	↓	↓
5	Aldi	12%	9%	12%	→	↑
6	Plus	9%	10%	8%	→	→
7=	Dirk van den Broek	6%	5%	5%	→	→
7=	Dirck III	3%	3%	5%	↑	→
7=	Sligro	4%	4%	5%	→	→
10=	Makro	4%	5%	4%	→	→
10=	Hoogvliet	3%	3%	4%	→	→
10=	Vomar	2%	4%	4%	↑	→
10=	Coop	4%	3%	4%	→	→
10=	Mitra	4%	4%	4%	→	→
15=	Dekamarkt	2%	3%	2%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Consumption frequency

Boomers are the most likely consumers of wine on a daily basis, while significantly fewer Gen Xs do so.

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Dutch regular wine drinkers (n≥1,009)

	2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
Most days / every day	**11%**	**14%**	**13%**	→	→
2-5 times a week	**29%**	**28%**	**31%**	→	→
About once a week	**31%**	**32%**	**32%**	→	→
1-3 times a month	**29%**	**26%**	**24%**	↓	→

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Dutch regular wine drinkers (n=1,009)

	Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
Most days / every day	**13%**	**7%**	**9%**	**4%**	**20%**
2-5 times a week	**31%**	**26%**	**32%**	**33%**	**31%**
About once a week	**32%**	**35%**	**37%**	**37%**	**27%**
1-3 times a month	**24%**	**32%**	**21%**	**26%**	**22%**

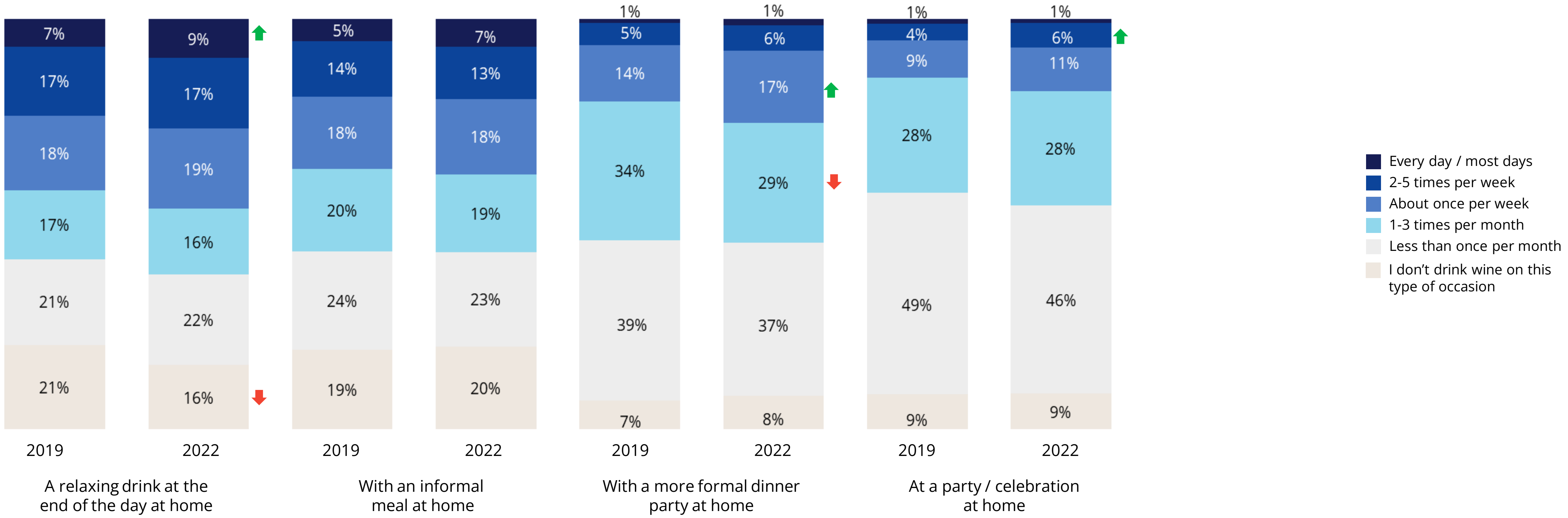
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Off-trade consumption frequency

Frequency of consumption for a relaxing drink at home is on the rise, with more drinking wine daily

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

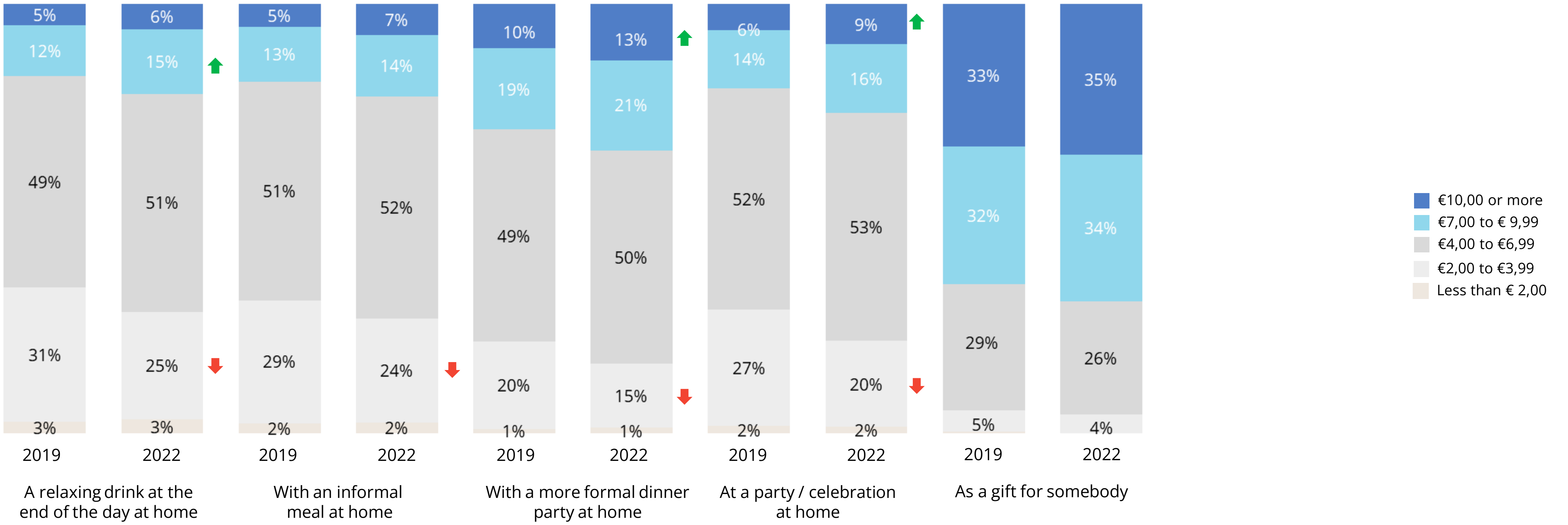
Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

Off-trade spend

Consumers are moving away from the lowest-priced wines across all occasions and are spending significantly more at premium price points on formal and celebratory occasions

Off-trade: Wine spend per bottle by occasion

Base = Those who buy wine in the off-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

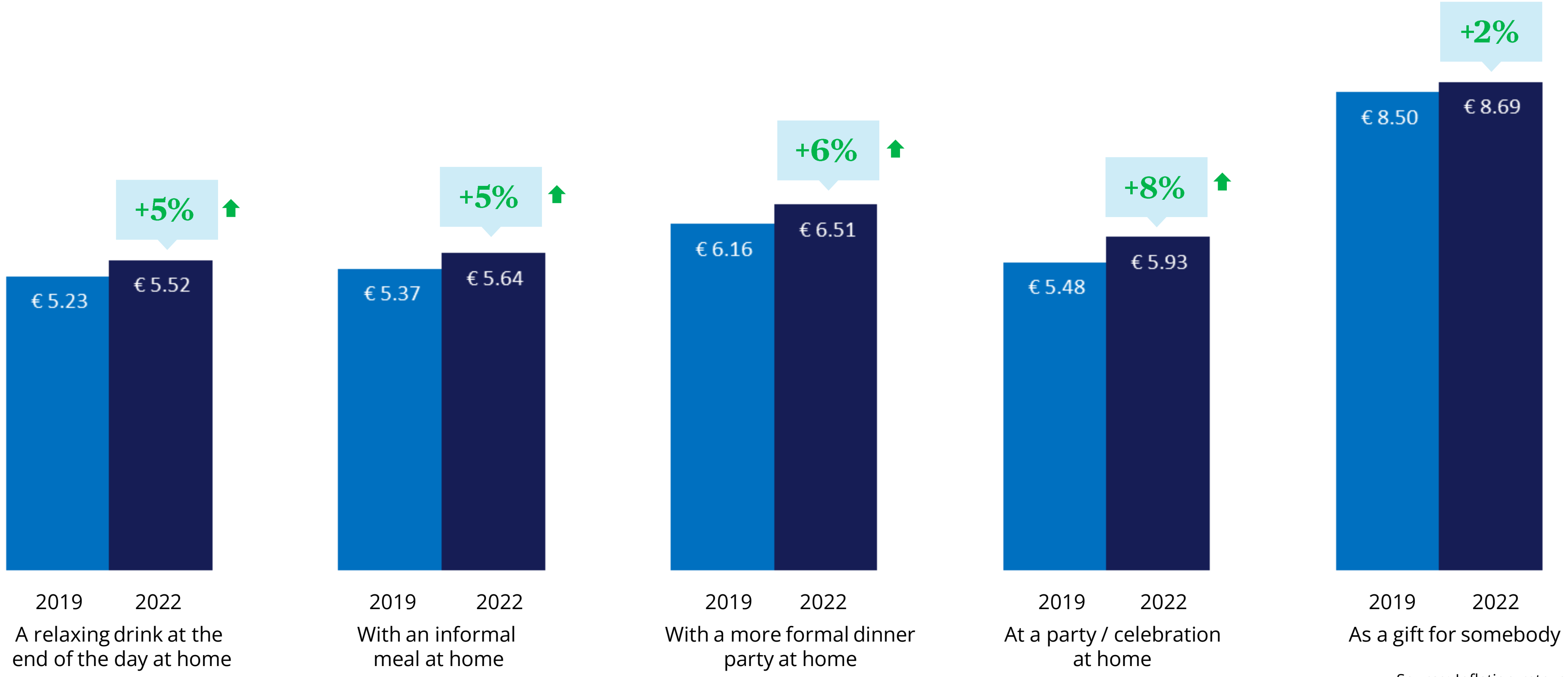
Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

Average off-trade spend

Average spend on wine in the off-trade has significantly increased across all occasions with celebrations growing quickest as the wine market premiumises

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the off-trade



Q: What do market experts say?

"Consumers are going to a higher price per bottle. I think that's a good thing because in the Netherlands, the average price of a bottle was always pretty low, and I think it's increasing."

Wine consultant, Netherlands

Inflation note

The rate of compound inflation within the Dutch economy has been 13% since 2019, meaning that the increase in spending per occasion is behind that of overall inflation

Source: Inflation rate, end of period consumer prices (Annual percent change) - IMF

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

On-trade consumption

The amount of wine bought in all on-trade locations has not fully recovered to pre-pandemic levels

Gen Zs have significantly higher consumption incidences in all on-trade settings and Millennials over-trading in bar consumption

Q: What do market experts say?

"Wine lovers are going to wine shops more and buy wines to have with dinner at home. They're not going out, but they're staying in and might buy a nice Burgundy wine for €50 instead of going to a restaurant and not being able to enjoy this nice Burgundy because it would cost them way more."

Wine importer, Netherlands

Wine purchase in on-trade

% who buy wine in a bar, pub or restaurant
Base = All Dutch regular wine drinkers (n≥1,009)

On-trade location		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
Bar or Pub	Yes	48%	41%	42%	↓	→
	No	52%	59%	58%	↑	→
Restaurant	Yes	86%	83%	82%	↓	→
	No	14%	17%	18%	↑	→
On-trade	On trade drinker	88%	84%	83%	↓	→
	Not on trade drinker	12%	16%	17%	↑	→

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Dutch regular wine drinkers (n=1,009)

On-trade location		Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
Bar or Pub	Yes	42%	54%	60%	39%	32%
	No	58%	46%	40%	61%	68%
Restaurant	Yes	82%	94%	87%	80%	78%
	No	18%	6%	13%	20%	22%
On-trade	On trade drinker	83%	97%	88%	81%	79%
	Not on trade drinker	17%	3%	12%	19%	21%

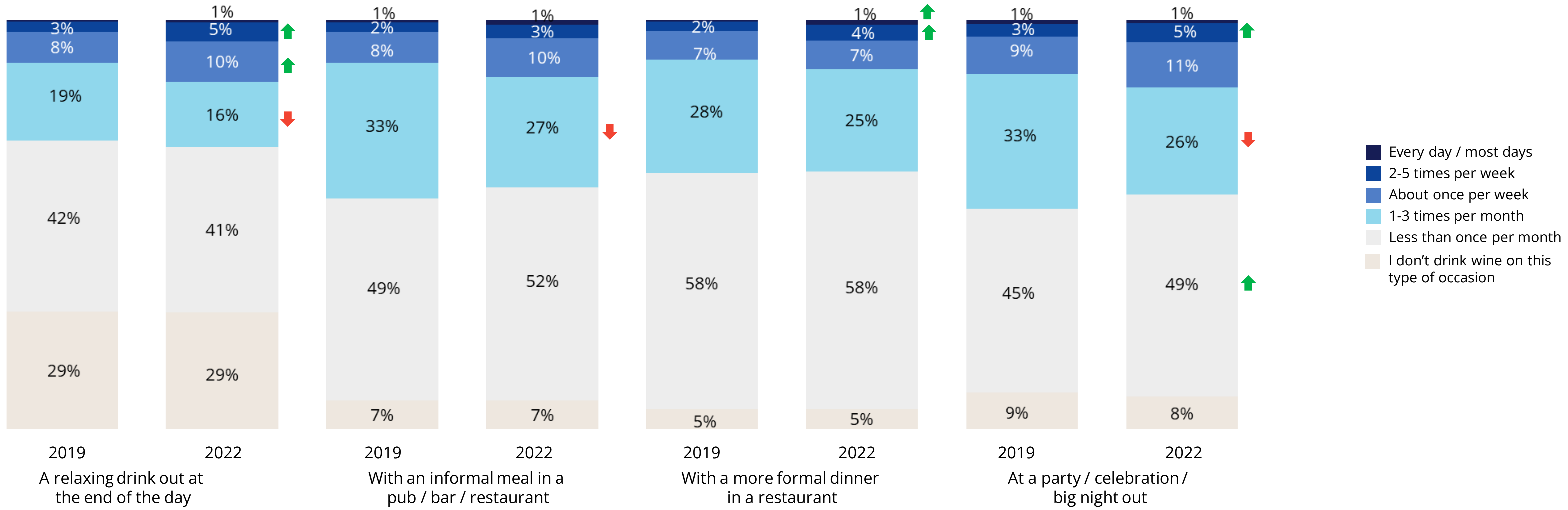
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

On-trade consumption frequency

Regular wine drinkers are increasing their frequency of consumption across almost all occasions

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

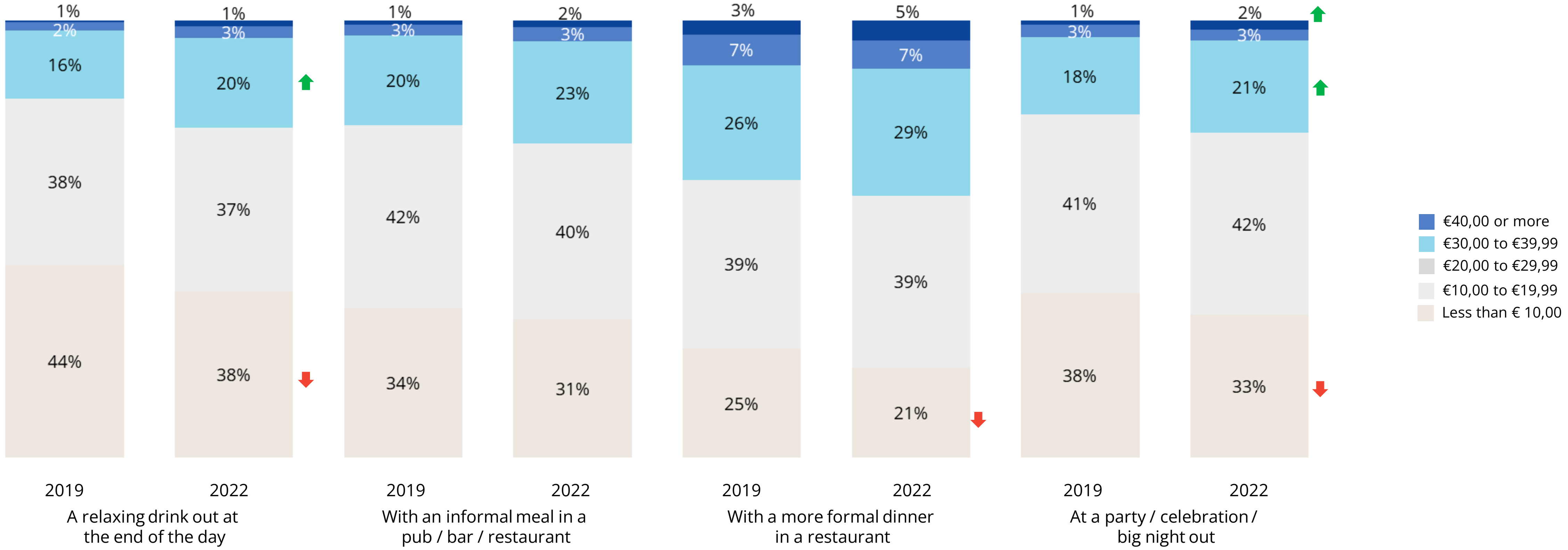
Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

On-trade spend

Regular wine drinkers are moving away from the lowest-priced wine on most occasions

On-trade: Wine spend per bottle by occasion

Base = Those who buy wine in the on-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

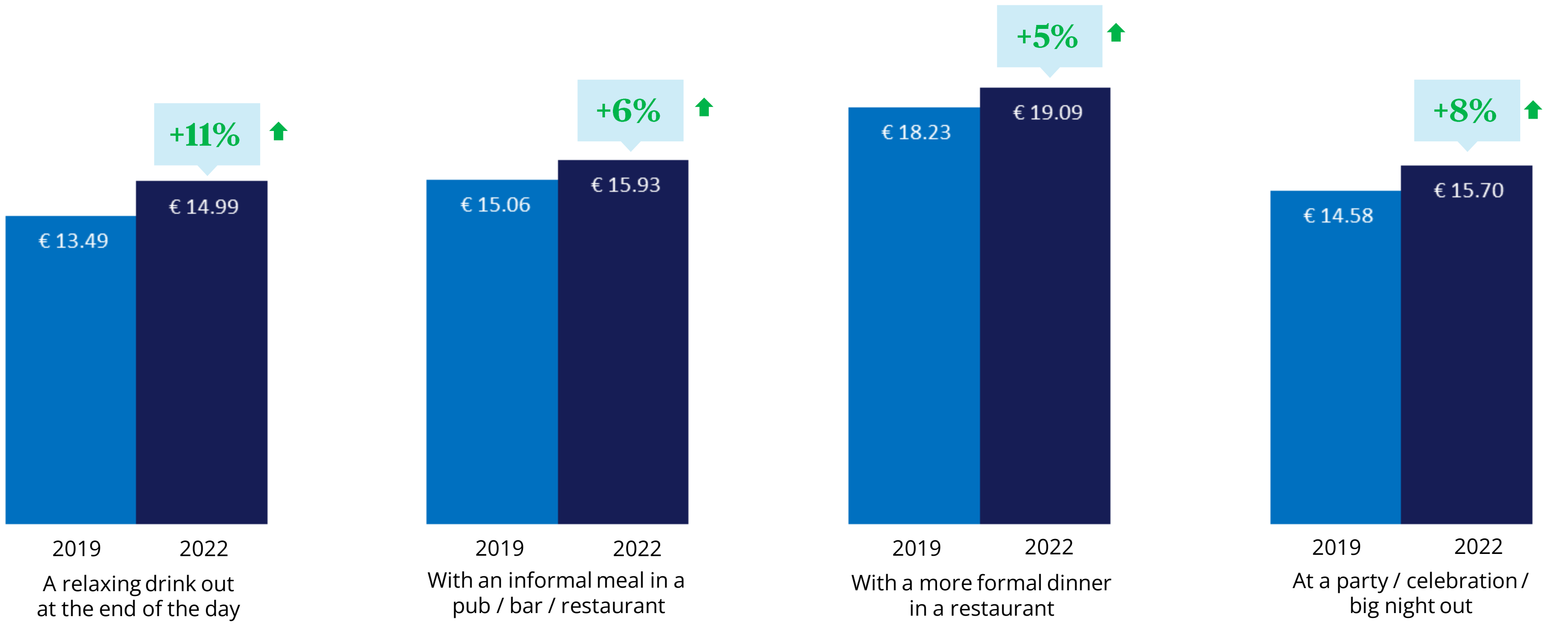
Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

Typical on-trade spend

On-trade spend has increased across all occasions, with a higher increase when relaxing at the end of the day

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



Inflation note

The rate of compound inflation within the Dutch economy has been 13% since 2019, meaning that the increase in spending per occasion is behind that of overall inflation

Source: Inflation rate, end of period consumer prices (Annual percent change) - IMF

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

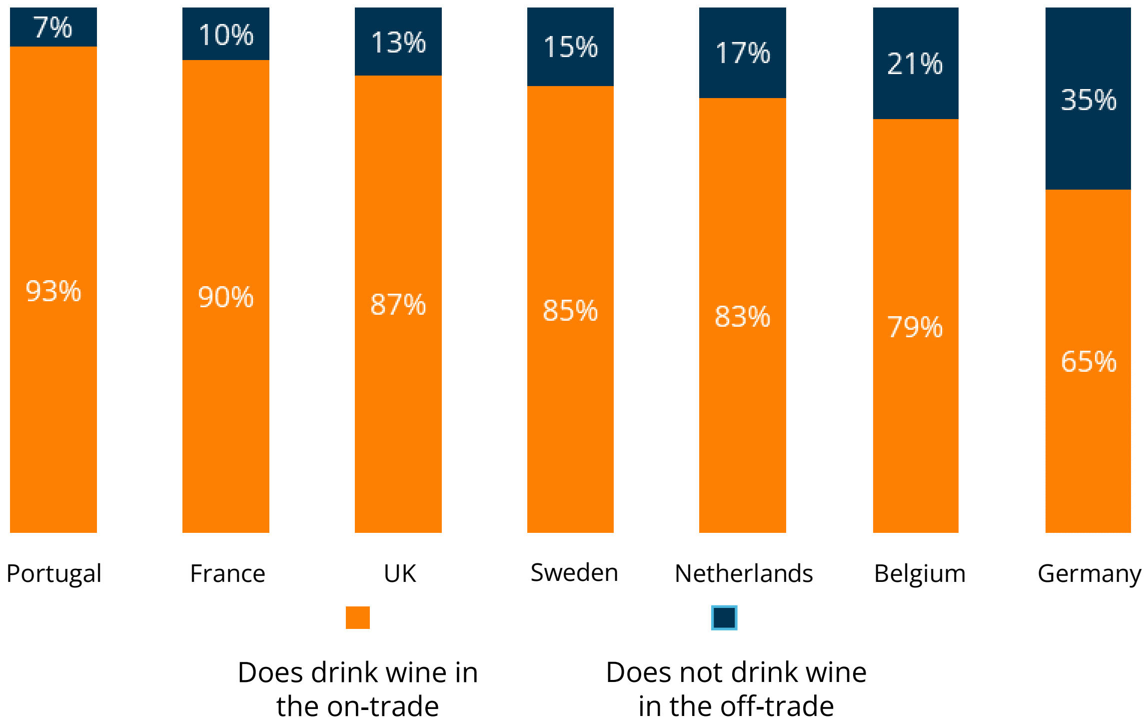
Source: Wine Intelligence, Vinitrac®, Netherlands, Oct '19, Apr '22, (n≥1,009) Dutch regular wine drinkers

HOT TOPIC

Wine on-trade global comparison (1/2)

Dutch regular wine drinkers do not consume as much wine in the on-trade as those in other European markets

Wine on-trade: differences by market



Demographic insights

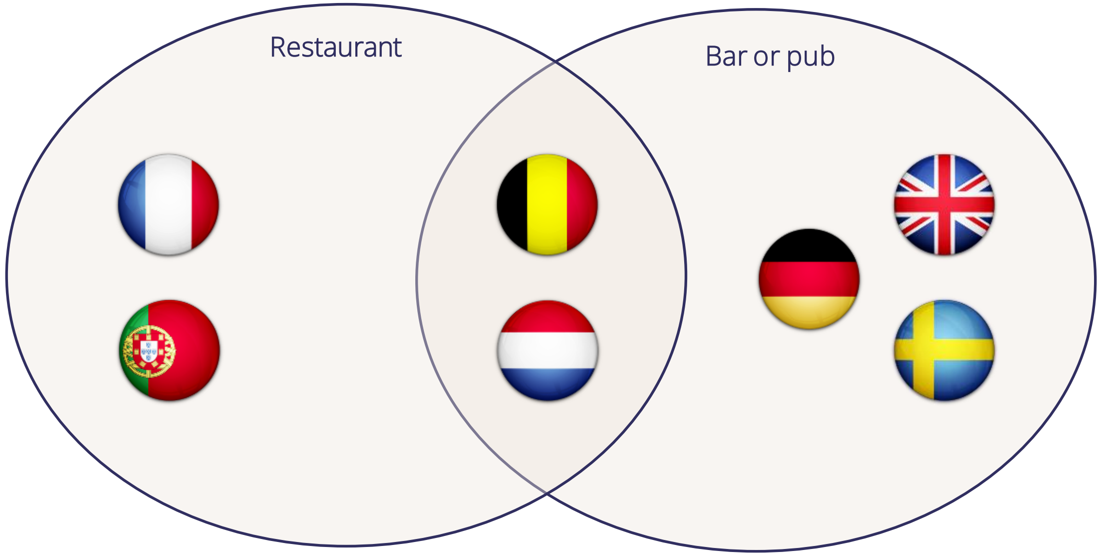
- Greater numbers of Gen Z wine drinkers say they have purchased wine in the on-trade when compared to regular wine drinkers as a whole

Source: Wine Intelligence, Vinitrac®, Apr '22, (n≥1,004), Global wine drinkers

Wine on-trade global comparison (2/2)

Dutch regular wine drinkers tend to consume wine both in bars and restaurants, similar to those in neighbouring Belgium

Wine on-trade: differences by market



Demographic insights

- Significantly fewer male drinkers in the Dutch market purchase their wine in a bar or a pub when compared to all regular wine drinkers
- Both Gen Zs and Millennials are more likely to purchase wine in a bar or a pub, while Gen Zs are more likely to purchase wine in restaurants, compared to all regular wine drinkers

Source: Wine Intelligence, Vinitrac®, Apr ’22, (n≥1,004), Global wine drinkers

Wine Views and Attitudes

Netherlands Wine Landscapes

2022

Wine views and attitudes

Key takeaways

1. Dutch wine drinkers are more involved

The proportion of regular wine drinkers who are deemed highly-involved in the category has risen consistently since 2019,

2. Decreasing knowledge base

Although Dutch wine drinkers are becoming more involved in the category, their knowledge levels are significantly lower than both 2019 and 2021.

Attitudes towards wine

Millennials are the most experimental group of wine drinkers with Boomers on the other end of the spectrum, the least open to trying new wine styles and sticking with what they know

Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Dutch regular wine drinkers (n≥1,009)

	2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
I enjoy trying new and different styles of wine on a regular basis	38%	40%	35%	➡	⬇
I don't mind what I buy so long as the price is right	17%	17%	19%	➡	➡
I know what I like and I tend to stick to what I know	45%	44%	45%	➡	➡

Q: What do market experts say?

"I find it very interesting that Millennials are very curious in learning about wine and experimenting. They're basically rebelling against everything traditional."

Wine importer, Netherlands

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Dutch regular wine drinkers (n=1,009)

	Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
I enjoy trying new and different styles of wine on a regular basis	35%	45%	51%	39%	25%
I don't mind what I buy so long as the price is right	19%	25%	27%	22%	13%
I know what I like and I tend to stick to what I know	45%	30%	22%	39%	62%

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Wine involvement

Significantly more regular wine drinkers now have high involvement with the wine category; Millennials are the group with the highest involvement

Wine involvement: Tracking

Base = All Dutch regular wine drinkers (n≥1,009)

	2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
High involvement	**20%**	**25%**	**25%**	⬆	➡
Medium involvement	**39%**	**42%**	**42%**	➡	➡
Low involvement	**41%**	**33%**	**34%**	⬇	➡

Wine involvement by generation

Base = All Dutch regular wine drinkers (n=1,009)

	Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
High involvement	**25%**	**11%**	**37%**	**29%**	**20%**
Medium involvement	**42%**	**48%**	**33%**	**39%**	**45%**
Low involvement	**34%**	**40%**	**30%**	**32%**	**34%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Involvement and perceived expertise (1)

Wine has increasingly become an alcoholic beverage consumed for pleasure in the Dutch market with consumers looking for the best quality wine and believing wine to be reasonably-priced

Involvement and perceived expertise in wine: Tracking

% who ‘agree’ or ‘strongly agree’ with the following statements
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Drinking wine gives me pleasure	75%	80%	77%	→	→
2	I always look for the best quality wines I can get for my budget	66%	66%	66%	→	→
3	Generally speaking, wine is reasonably priced	52%	58%	55%	→	→
4	Deciding which wine to buy is an important decision	47%	51%	51%	↑	→
5	I like to take my time when I purchase a bottle of wine	39%	44%	45%	↑	→
6	I have a strong interest in wine	38%	44%	44%	↑	→
7	Wine is important to me in my lifestyle	32%	41%	40%	↑	→
8	I don’t understand much about wine	37%	35%	38%	→	→
9	Compared to others, I know less about the subject of wine	33%	35%	37%	↑	→
10	Generally speaking, wine is an expensive drink	24%	25%	30%	↑	↑
11	I feel competent about my knowledge of wine	21%	22%	25%	↑	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar ’19, Jan & July ‘21, Apr ‘22, (n≥1,009) Dutch regular wine drinkers

Involvement and perceived expertise (2)

Millennials driving involvement and perceived expertise in wine, with a strong interest and confidence in their wine knowledge

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Dutch regular wine drinkers (n=1,009)

Ranking '22		Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
1	Drinking wine gives me pleasure	77%	67%	78%	82%	76%
2	I always look for the best quality wines I can get for my budget	66%	60%	65%	67%	67%
3	Generally speaking, wine is reasonably priced	55%	46%	57%	57%	54%
4	Deciding which wine to buy is an important decision	51%	48%	56%	54%	47%
5	I like to take my time when I purchase a bottle of wine	45%	37%	53%	53%	40%
6	I have a strong interest in wine	44%	45%	56%	49%	36%
7	Wine is important to me in my lifestyle	40%	31%	47%	43%	36%
8	I don't understand much about wine	38%	46%	36%	40%	35%
9	Compared to others, I know less about the subject of wine	37%	52%	39%	38%	32%
10	Generally speaking, wine is an expensive drink	30%	31%	32%	35%	26%
11	I feel competent about my knowledge of wine	25%	29%	34%	29%	18%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Wine knowledge and confidence

Compared with 2019 and 2021, wine knowledge among all Dutch regular wine drinkers has seen a slight decrease. Confidence levels have remained stabled since 2019

Wine knowledge index: Tracking

Base = All Dutch regular wine drinkers (n≥1,009)

	2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
Knowledge Index	34.3	33.7	32.1	⬇	⬇

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.

*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

-2.2 Index change

Wine confidence index: Tracking

Base = All Dutch regular wine drinkers (n≥1,009)

	2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
Confidence Index	44.8	45.9	45.6	➡	➡

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.

**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

+0.8 Index change

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Wine-drinking motivations

Boomers are the group more likely to drink wine based on taste, pairing with food and sharing; Millennials who are more motivated by the social status of wine

Wine drinking motivations

% who selected the following as reasons why they drink wine
Base = All Dutch regular wine drinkers (n=1,009)

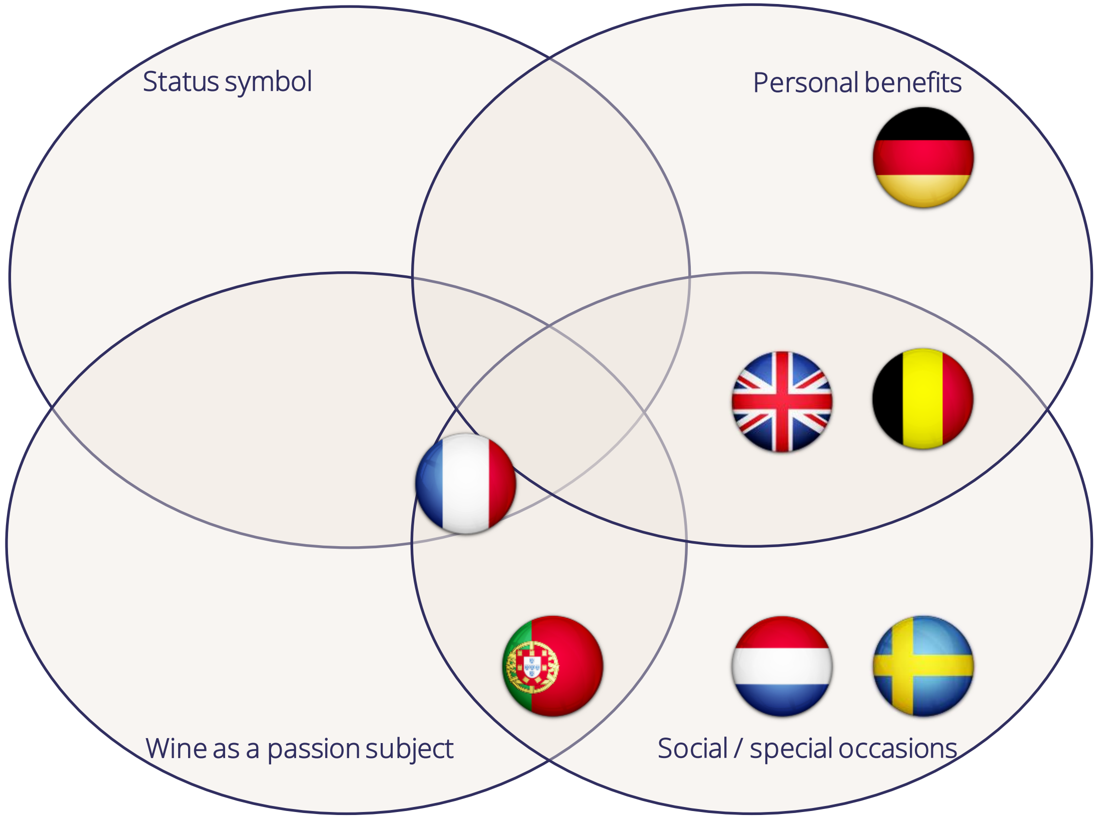
Ranking '22		Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
1	I really love the taste of wine	58%	46%	42%	56%	69%
2	To celebrate special occasions	51%	52%	43%	52%	54%
3	Wine is about sharing with a partner / close friend or family member	46%	35%	37%	46%	53%
4	Wine enhances food and meals	45%	32%	42%	40%	52%
5	Drinking wine makes me feel relaxed	35%	37%	36%	41%	32%
6	Wine is about sharing something with others	34%	36%	31%	31%	36%
7	Wine helps create a warm / friendly atmosphere	33%	35%	32%	36%	32%
8	I treat myself with wine at the end of the day	29%	25%	30%	28%	30%
9=	Most of my friends drink wine	18%	20%	19%	15%	19%
9=	I like learning about new wines	18%	23%	23%	18%	14%
9=	Drinking wine can be good for my health	18%	10%	17%	18%	20%
12	Wine is a refreshing drink	15%	28%	18%	15%	11%
13	I like shopping / choosing wines to drink	14%	16%	22%	14%	11%
14	It makes people sophisticated	10%	14%	21%	8%	4%
15	Wine is a fashionable drink	7%	15%	10%	8%	4%
16	It makes me feel individual and unique	6%	8%	13%	7%	2%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Wine-drinking motivations

Dutch regular wine drinkers are more likely to drink wine on special occasions than those in most other European countries

Top wine motivation: differences by market



Status symbol
It makes me feel individual and unique
It makes people sophisticated
Wine is a fashionable drink
Most of my friends drink wine

Personal benefits
Wine enhances food and meals
Drinking wine makes me feel relaxed
Drinking wine can be good for my health
I treat myself with wine at the end of the day
Wine is a refreshing drink
I really love the taste of wine

Wine as a passion subject
I like shopping / choosing wines to drink
I like learning about new wines

Social / special occasions
To celebrate special occasions
Wine helps create a warm / friendly atmosphere
Wine is about sharing with a partner / close friend or family member
Wine is about sharing something with others

Source: Wine Intelligence, Vinitrac®, Apr '22, (n≥1,004), Global wine drinkers

Wine-buying choice cues

Grape variety is the top purchase cue, but brand, origin and packaging are becoming more important

Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Grape variety	66%	68%	67%	→	→
2	Wine that matches or complements food	64%	62%	65%	→	→
3	A brand I am aware of	59%	60%	63%	↑	→
4	Taste or wine style descriptions displayed on the shelves or on wine labels	61%	62%	61%	→	→
5	Promotional offer	63%	63%	60%	→	→
6=	Recommendation by friend or family	57%	58%	56%	→	→
6=	The country of origin	51%	53%	56%	↑	→
8	The region of origin	46%	48%	53%	↑	↑
9	Recommendation by wine critic or writer	36%	39%	41%	↑	→
10	Appeal of the bottle and / or label design	34%	38%	40%	↑	→
11=	Recommendations from shop staff or shop leaflets	32%	32%	34%	→	→
11=	Alcohol content	29%	29%	34%	↑	↑
13	Recommendation by wine guide books	28%	30%	32%	↑	→
14	Whether or not the wine has won a medal or award	14%	17%	19%	↑	→

Q: What do market experts say?

"You have educated wine drinkers that go to specialist wine shops, to the boutique wine shops. In the supermarkets, they look at the label and they look at the grape variety, and not specifically where it's coming from."

Wine importer, Netherlands

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Hot Topic: Wine Packaging and Closures

Netherlands Wine Landscapes

2022

Wine packaging and closures

Key takeaways

1. Alternative packaging is more popular among Millennials

Millennials have higher purchase incidences for Tetra Pak and cans, while both they and Gen Zs purchase more magnums than regular wine drinkers as a whole.

2. Lower preference for natural cork

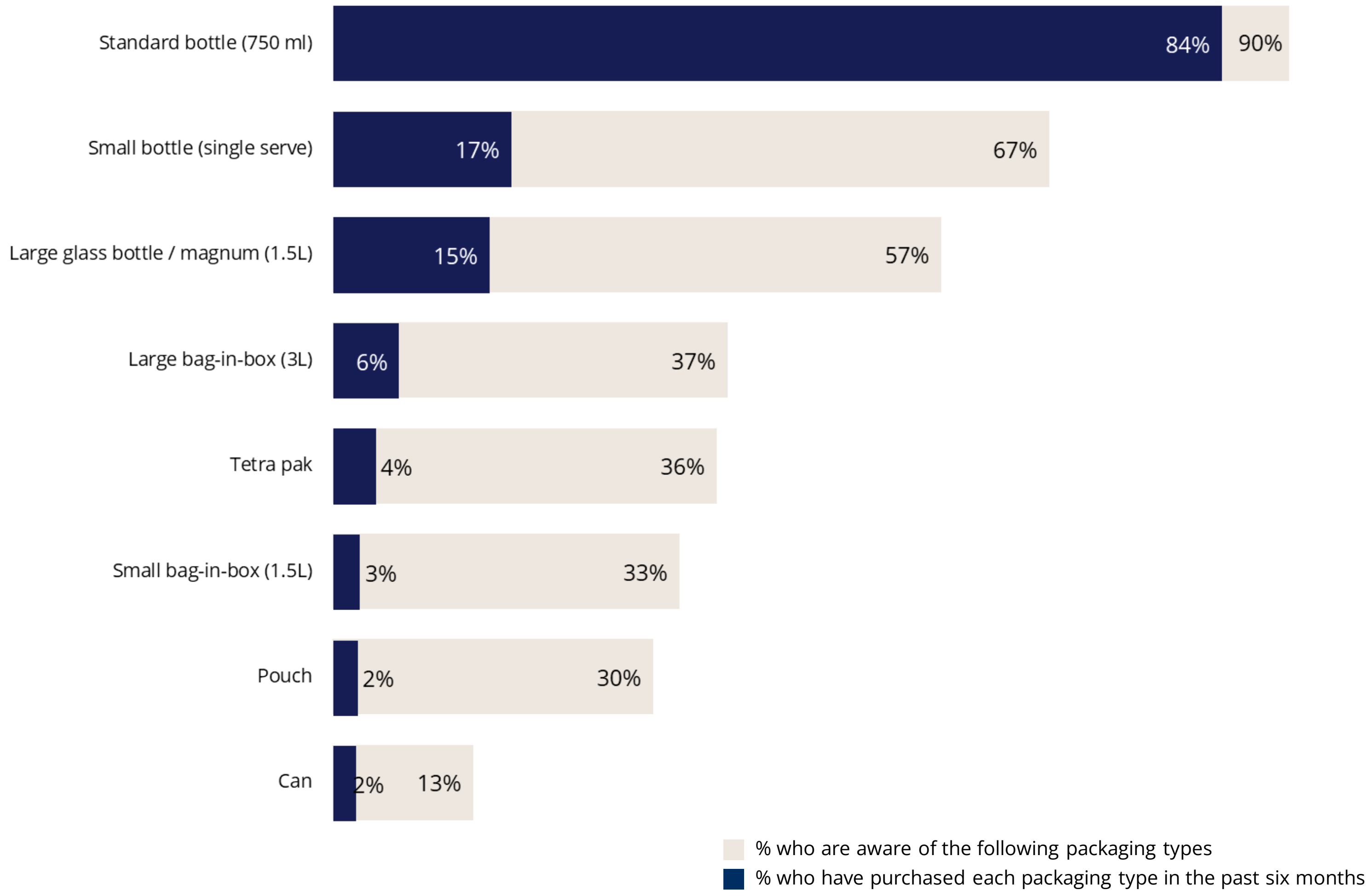
Significantly fewer wine drinkers prefer buying wine closures with natural cork, with around 50% liking bottles with screw-caps.

Packaging type consumption / awareness

The standard bottle format continues to dominate the Dutch market

Packaging types: Awareness and consumption levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All Dutch regular wine drinkers (n=1,009)



Q: What do market experts say?

"We're conservative in the Netherlands. Compared to other markets I work in alternative packaging isn't taking off. In the Netherlands, bag-in-box is still not taking off. We really want to increase bag-in-box because it's got such good potential, and it's carried by the supermarkets, but it's just not selling as well as in other markets."

Wine importer, Netherlands

Source: IWSR estimate
Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Packaging purchase and conversion

Millennials are leading the trend in the consumption of alternative packaging formats, with Magnum's popularity in particular with Gen Z and millennials being more associated with social occasions

Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All Dutch regular wine drinkers (n=1,009)

Ranking '22		Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
1	Standard bottle (750 ml)	84%	76%	76%	87%	88%
2	Small bottle (single serve)	17%	24%	20%	21%	12%
3	Large glass bottle / magnum (1.5L)	15%	29%	22%	18%	7%
4	Large bag-in-box (3L)	6%	3%	2%	5%	9%
5	Tetra pak	4%	1%	7%	4%	2%
6	Small bag-in-box (1.5L)	3%	1%	4%	3%	2%
7=	Pouch	2%	2%	4%	3%	1%
7=	Can	2%	3%	6%	2%	0%

Packaging conversion: by generation

% who are aware of and have purchased wine in the following packaging types
Base = All Dutch regular wine drinkers (n=1,009)

Ranking '22		Regular Wine Drinkers (n=1,009)	18-24 Gen Z (n=97)	25-39 Millennials (n=214)	40-54 Gen X (n=226)	55+ Boomers (n=472)
1	Standard bottle (750 ml)	93%	91%	91%	96%	94%
2	Large glass bottle / magnum (1.5L)	26%	47%	39%	31%	12%
3	Small bottle (single serve)	25%	33%	32%	32%	17%
4	Large bag-in-box (3L)	17%	13%	8%	15%	20%
5	Can	16%	16%	33%	14%	4%
6	Tetra pak	10%	4%	23%	11%	6%
7=	Pouch	8%	8%	16%	8%	5%
7=	Small bag-in-box (1.5L)	8%	4%	16%	10%	4%

= Represents equal ranking
Grey shading: low sample size (n<50)
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

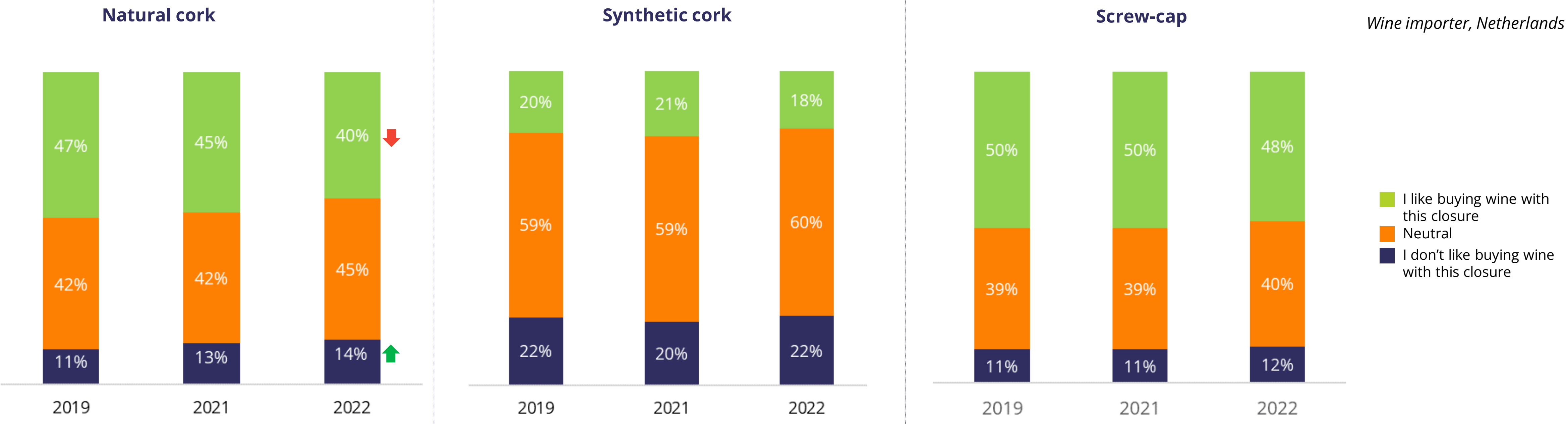
HOT TOPIC

Wine closure preferences

Screw-caps are a favourite closure among Dutch regular wine drinkers, with natural cork a declining preference

Wine closure preferences

% who hold the following view of each wine closure type
Base = All Dutch regular wine drinkers (n≥1,009)



Q: What do market experts say?

"We don't have issues in marketing wines with a screw-cap, which, in certain other countries, they do have."

Wine importer, Netherlands

⬆ / ⬇: Statistically significantly higher / lower than the 2019 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

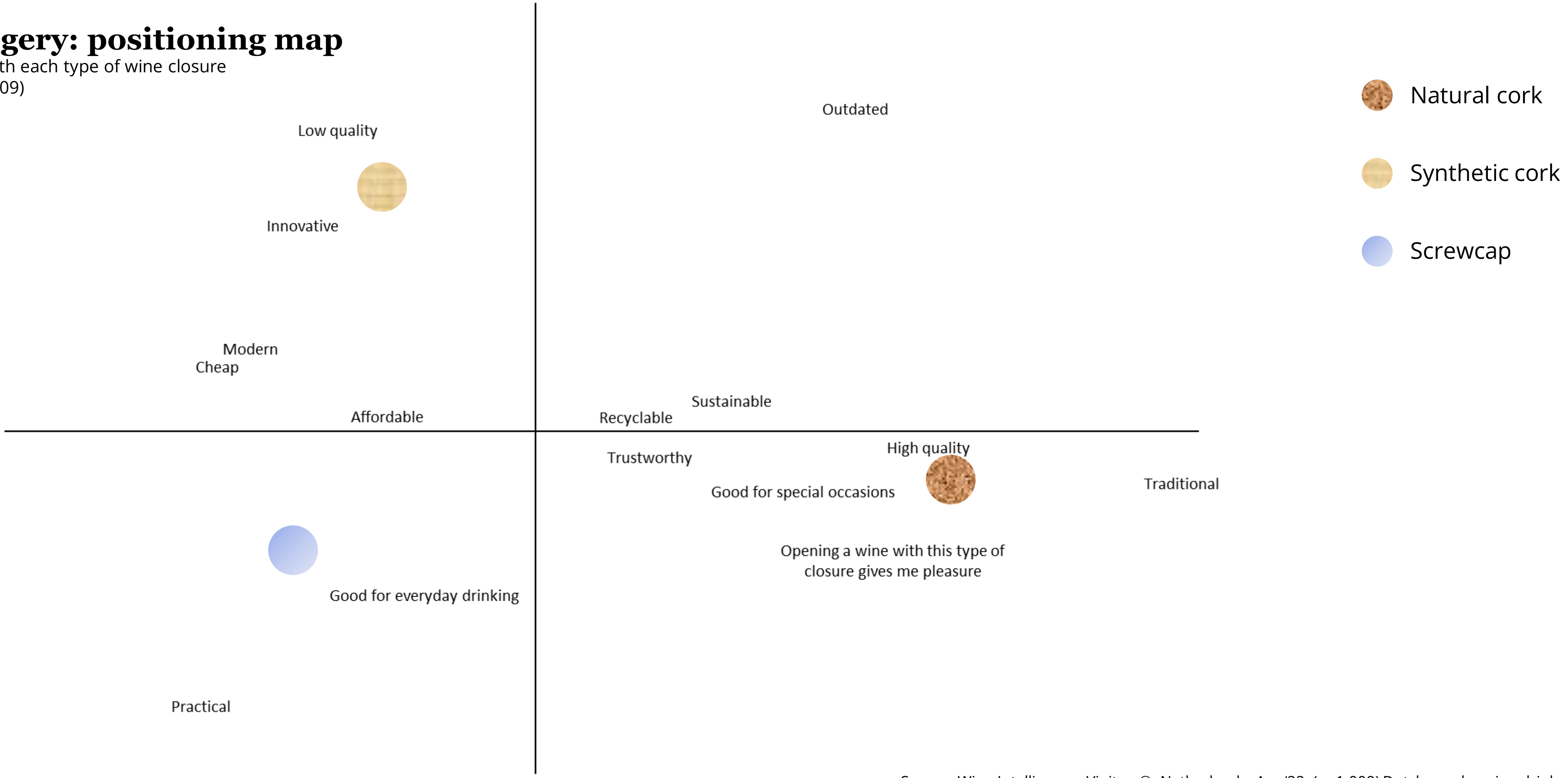
HOT TOPIC

Views on wine closure types

Screw-cap has positive associations for its practicality and ease of use for everyday drinking

Wine closure types imagery: positioning map

% who associate the following statements with each type of wine closure
Base = All Dutch regular wine drinkers (n=1,009)



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Hot Topic: Consumer Sentiment

Netherlands Wine Landscapes

2022

Consumer sentiment

Key takeaways

1. Dutch wine drinkers are happy, but worried about the near future

Dutch regular wine drinkers are happy and feel confident about managing their finances, though more are actively seeking out promotions. There are worries about the year ahead.

2. Lower levels of going out

In line with lower incidences of on-trade purchases of wine, Dutch regular wine drinkers are going out less than before

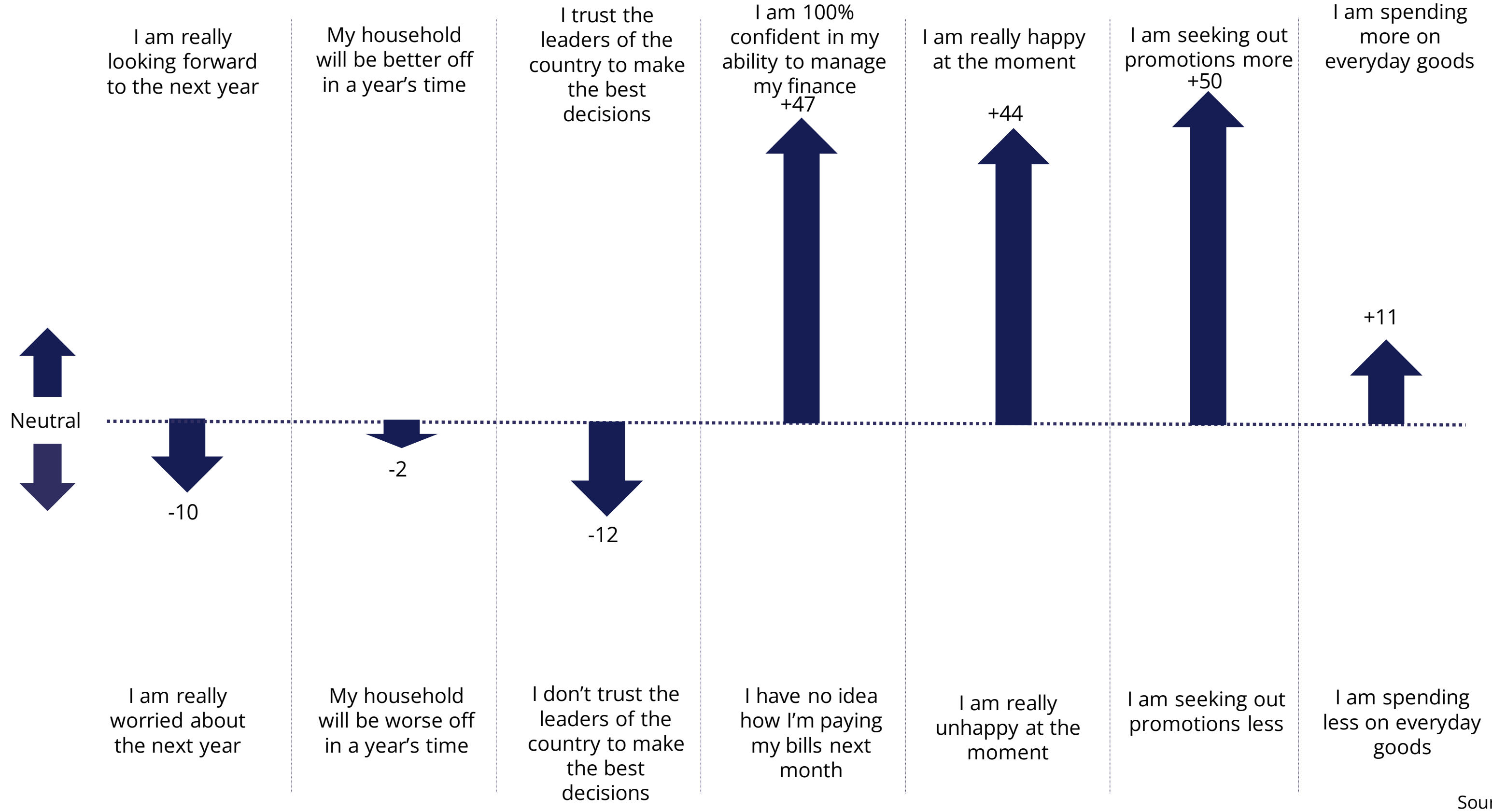
HOT TOPIC

Consumer sentiment

Dutch regular wine drinkers are happy with their personal finances, while keen to seek out promotions, but they are pessimistic about the future

Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Dutch regular wine drinkers (n=1,009)



Demographic insights

- Greater numbers of both Gen Z and Millennials drinkers were uncertain about their ability to manage their finance and were currently unhappy about their situation when compared to RWDs

Q: What do market experts say?

"For now, confidence is high, but I don't know for how long that will last. There's still a lot of uncertainty in the air. What will happen later in the year? Will we have lockdowns again? How is the war? How is that going to evolve? The inflation rate is really, really high too."

Wine consultant, Netherlands

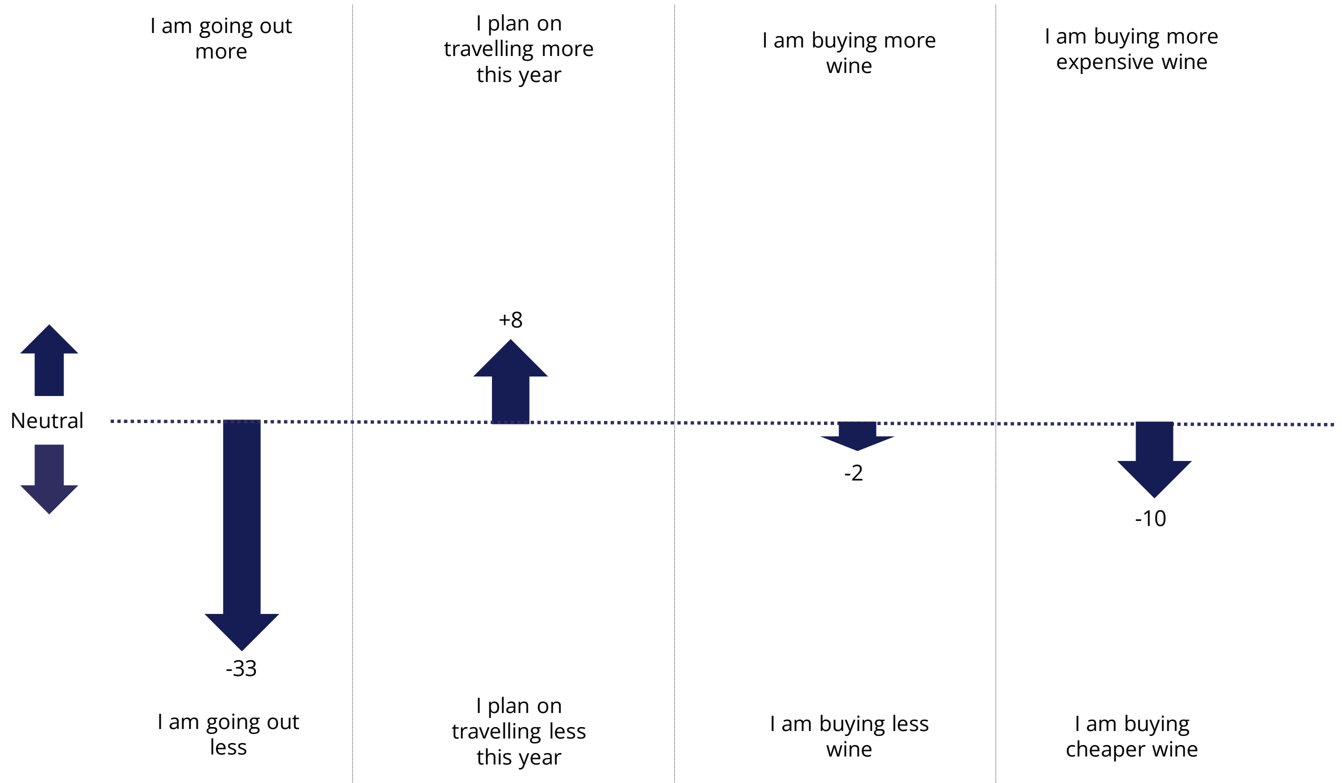
Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Consumer sentiment

Despite general optimism among consumers, there is still a reluctance to go out

Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Dutch regular wine drinkers (n=1,009)



Demographic insights

- Significantly more Gen Z and Millennials are buying more wine compared to regular wine drinkers generally in the Dutch market

Q: What do market experts say?

"There are a lot of concerns about consumer confidence, and people still consider wine as a luxury good in the Netherlands. So, we fear that on-trade expenditure will decrease."

Wine buyer, Netherlands

Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Brand Health

Netherlands Wine Landscapes

2022

Brand health

Key takeaways

1. Wild Pig has risen to be the number two power brand

Wild Pigs replaces Kaapse Pracht as one of the three most powerful wine brands in the Dutch market and leapfrogs JP Chenet to take second place. Lindeman's remains the most powerful brand in the market

2. Awareness and purchase incidences in decline

Most mainstream brands in the Netherlands have seen their incidences of awareness and purchase drop significantly since 2019 as Dutch regular wine drinkers focus on a narrower portfolio of brands.

Global Wine Brand Power Index

Brand health measures included in the index

Measure	Definition	Index
Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	**Brand awareness index**
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	**Brand purchase index**
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand	
Consideration	% who would consider buying each brand Base = Those who have heard of each brand	
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand	

Wine Brand Power Index

Netherlands Brand Power

Lindeman's holds on to its top spot in the 2022 Netherlands Brand Power Index

Dr Henry John Lindeman's 1843

1st

Wild Pig
Vin de Pays d'Oc

2nd

J.P. CHENET

3rd

Dutch Brand Power Index 2022

Lindeman's and JP Chenet retain their number one and three positions, while Wild Pig replaces Kaapse Pracht to take the number two spot

Ranking '22		Final Index	Tracking vs 2021	Score difference vs 2021
1	Lindeman's	96.9	=	0.8
2	Wild Pig	80.8	⬆+2	5.7
3	J.P. Chenet	79.6	=	2.4
4	Kaapse Pracht	78.5	⬇-2	-4.4
5	Mooi Kaap	73.1	⬆+1	2.7
6	Supermarket own brand	72.8	⬇-1	-1.2
7	Gato Negro	63.5	=	-0.4
8	Casillero del Diablo	62.2	⬆+1	1.8
9	Jacob's Creek	59.7	⬇-1	-2.3
10	Stoney Creek	57.4	⬆+1	2.2
11	Gallo Family Vineyards	56.8	⬆+3	3.3
12	Undurraga	56.4	⬆+1	2.7
13	Berberana	55.7	⬆+3	3.0
14	i heart Wines	55.4	n/a	n/a
15	La Tulipe	55.3	n/a	n/a

Ranking '22		Final Index	Tracking vs 2021	Score difference vs 2021
16	Welmoed	52.0	⬇-6	-5.8
17	Campo Viejo	51.8	⬆+2	4.9
18	Hardys	51.5	⬇-6	-3.3
19	Alpaca	51.0	n/a	n/a
20	Cono Sur	50.2	⬇-5	-2.7
21	Torres	49.2	⬇-4	0.1
22	Barefoot	48.4	=	4.2
23	Norton	47.8	⬇-5	-1.0
24	Yellow Tail	44.9	⬇-3	0.3
25	Maison LaCheteau	44.5	⬇-2	1.0
26=	Penfolds	44.2	n/a	n/a
26=	Kim Crawford	44.2	n/a	n/a
28	Kumala	43.5	n/a	n/a
29	Nederburg	43.4	⬇-9	-1.4
30	Valdivieso	42.1	⬇-5	2.2

Source: Wine Intelligence, Vinitrac® Netherlands, Feb '22 Dutch regular wine drinkers

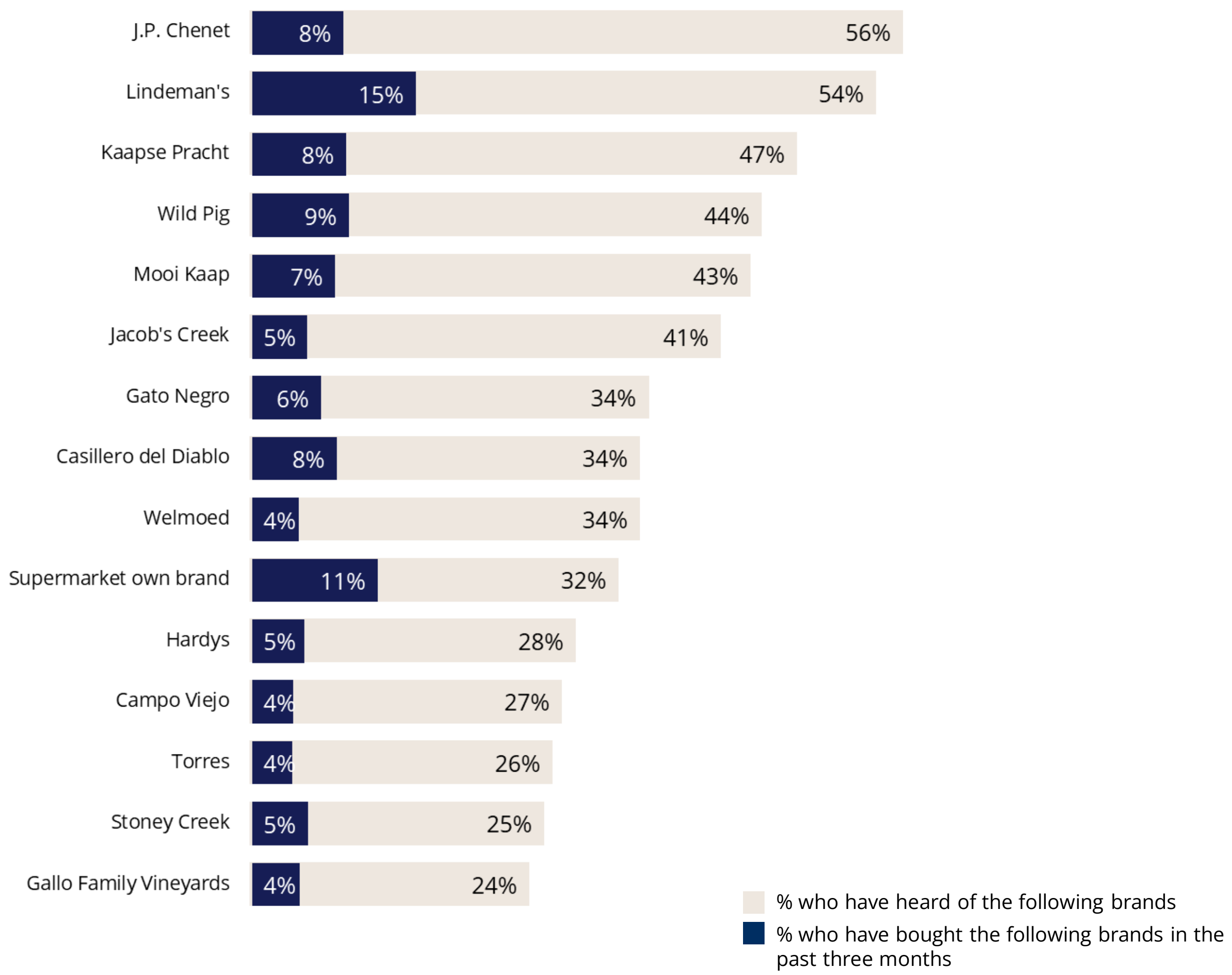
Brand health: Consumption / awareness

French wine brand JP Chenet is the most well-known brand followed by Australian wine brand Lindeman's.

Notably, supermarket own-brand has a high purchase incidence relative to its awareness

Brand health: Top 15 awareness and consumption levels

Base = All Dutch regular wine drinkers (n=1,009)



Q: What do market experts say?

"Lindeman's and Jacob's Creek are doing very well in the Dutch market at the moment"

Wine importer, Netherlands

Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Brand awareness: Tracking

Decreasing awareness among the top 15 mainstream brands since 2019, with regular wine drinkers aware of fewer brands

Awareness: Tracking

% who have heard of the following brands
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	J.P. Chenet	**67%**	**64%**	**56%**	↓	↓
2	Lindeman's	**61%**	**59%**	**54%**	↓	↓
3	Kaapse Pracht	**52%**	**50%**	**47%**	↓	→
4	Wild Pig	**49%**	**50%**	**44%**	↓	↓
5	Mooi Kaap	**45%**	**45%**	**43%**	→	→
6	Jacob's Creek	**44%**	**44%**	**41%**	→	→
7=	Gato Negro	**33%**	**39%**	**34%**	→	↓
7=	Casillero del Diablo	**38%**	**36%**	**34%**	↓	→
7=	Welmoed	**32%**	**34%**	**34%**	→	→
10	Supermarket own brand	**45%**	**41%**	**32%**	↓	↓
11	Hardys	**26%**	**28%**	**28%**	→	→
12	Campo Viejo	**28%**	**28%**	**27%**	→	→
13	Torres	**31%**	**30%**	**26%**	↓	↓
14	Stoney Creek	**n/a**	**30%**	**25%**	n/a	↓
15	Gallo Family Vineyards	**26%**	**28%**	**24%**	→	↓

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
16	La Tulipe	**21%**	**23%**	**22%**	→	→
17	Undurraga	**21%**	**23%**	**21%**	→	→
18=	Norton	**21%**	**20%**	**20%**	→	→
18=	Osborne	**26%**	**24%**	**20%**	↓	↓
20	Alpaca	**n/a**	**19%**	**18%**	n/a	→
21	Nederburg	**19%**	**19%**	**17%**	→	→
22	Berberana	**17%**	**17%**	**16%**	→	→
23=	Maison LaCheteau	**17%**	**15%**	**14%**	↓	→
23=	Frontera	**16%**	**16%**	**14%**	→	→
25=	La Châsse	**13%**	**14%**	**13%**	→	→
25=	Yellow Tail	**14%**	**13%**	**13%**	→	→
25=	Mouton Cadet	**15%**	**12%**	**13%**	→	→
28=	Barefoot	**n/a**	**13%**	**12%**	n/a	→
28=	Valdivieso	**14%**	**15%**	**12%**	→	↓
30	Les Dauphins	**13%**	**12%**	**11%**	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Brand purchase: Tracking

Regular wine drinkers are buying a narrower portfolio of brands with purchase rates among the top five brands all down

Purchase: Tracking

% who have bought the following brands in the past three months
Base = All Dutch regular wine drinkers (n≥1,009)

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Lindeman's	20%	17%	15%	↓	→
2	Supermarket own brand	18%	17%	11%	↓	↓
3	Wild Pig	15%	13%	9%	↓	↓
4=	Kaapse Pracht	12%	11%	8%	↓	↓
4=	J.P. Chenet	11%	10%	8%	↓	↓
4=	Casillero del Diablo	9%	7%	8%	→	→
7	Mooi Kaap	9%	8%	7%	→	→
8	Gato Negro	8%	10%	6%	→	↓
9=	Stoney Creek	n/a	7%	5%	n/a	→
9=	Jacob's Creek	9%	7%	5%	↓	↓
9=	Hardys	4%	5%	5%	→	→
12=	Berberana	5%	4%	4%	→	→
12=	Gallo Family Vineyards	6%	5%	4%	→	→
12=	Welmoed	4%	4%	4%	→	→
12=	Undurraga	6%	6%	4%	↓	↓
12=	La Tulipe	4%	4%	4%	→	→
12=	Norton	4%	3%	4%	→	→
12=	Campo Viejo	5%	5%	4%	↓	→
12=	Torres	5%	4%	4%	→	→
20=	Alpaca	n/a	5%	3%	n/a	→
20=	i heart Wines	n/a	4%	3%	n/a	→
20=	Nederburg	4%	3%	3%	→	→
20=	Valdivieso	3%	4%	3%	→	→
20=	Yellow Tail	3%	2%	3%	→	→
25=	Barefoot	n/a	3%	2%	n/a	→
25=	Frontera	2%	2%	2%	→	→
25=	Osborne	3%	2%	2%	↓	→
25=	Alamos	n/a	2%	2%	n/a	→
25=	Maison LaCheteau	3%	2%	2%	↓	→
25=	Les Dauphins	1%	2%	2%	→	→

Results for all brands available in the data table

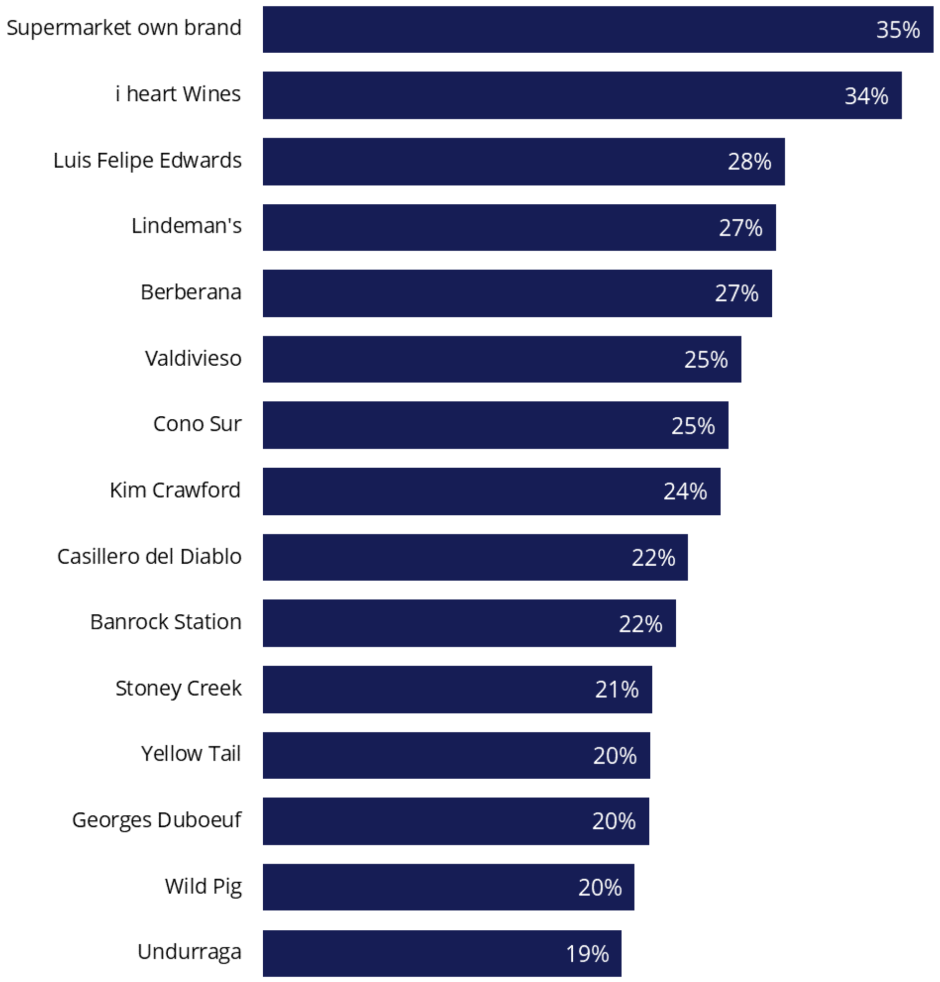
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Brand conversion

Supermarket own-brands and I Heart wines performs well among where consumers are aware of them

Conversion: Top 15

% who have bought the following brands in the past three months
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Brand conversion: Tracking

Conversion rates are stable for most brands, though those mainstream brands Lindeman's and Wild Pig have fallen

Conversion: Tracking

% who have bought the following brands in the past three months
Base = Those who have heard of each brand

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Supermarket own brand	39%	41%	35%	→	→
2	i heart Wines	n/a	38%	34%	n/a	→
3	Luis Felipe Edwards	23%	10%	28%	→	↑
4=	Lindeman's	33%	29%	27%	↓	→
4=	Berberana	29%	22%	27%	→	→
6=	Valdivieso	23%	25%	25%	→	→
6=	Cono Sur	18%	23%	25%	→	→
8	Kim Crawford	14%	24%	24%	→	→
9=	Casillero del Diablo	23%	20%	22%	→	→
9=	Banrock Station	17%	12%	22%	→	→
11	Stoney Creek	n/a	24%	21%	n/a	→
12=	Yellow Tail	22%	17%	20%	→	→
12=	Georges Duboeuf	21%	11%	20%	→	→
12=	Wild Pig	31%	25%	20%	↓	↓
15=	Undurraga	29%	25%	19%	↓	→
15=	Alamos	n/a	18%	19%	n/a	→
17=	Norton	19%	15%	18%	→	→
17=	Alpaca	n/a	25%	18%	n/a	→
17=	KWV	23%	21%	18%	→	→
17=	Gato Negro	24%	25%	18%	↓	↓
17=	Nederburg	20%	15%	18%	→	→
17=	Kaapse Pracht	24%	21%	18%	↓	→
17=	Barefoot	n/a	22%	18%	n/a	→
17=	Gallo Family Vineyards	22%	19%	18%	→	→
25=	Mooi Kaap	20%	19%	17%	→	→
25=	Concha y Toro	17%	16%	17%	→	→
25=	Pasqua	n/a	11%	17%	n/a	→
25=	Santa Alicia	19%	15%	17%	→	→
25=	La Tulipe	20%	18%	17%	→	→
25=	Hardys	16%	18%	17%	→	→

Results for all brands available in the data table

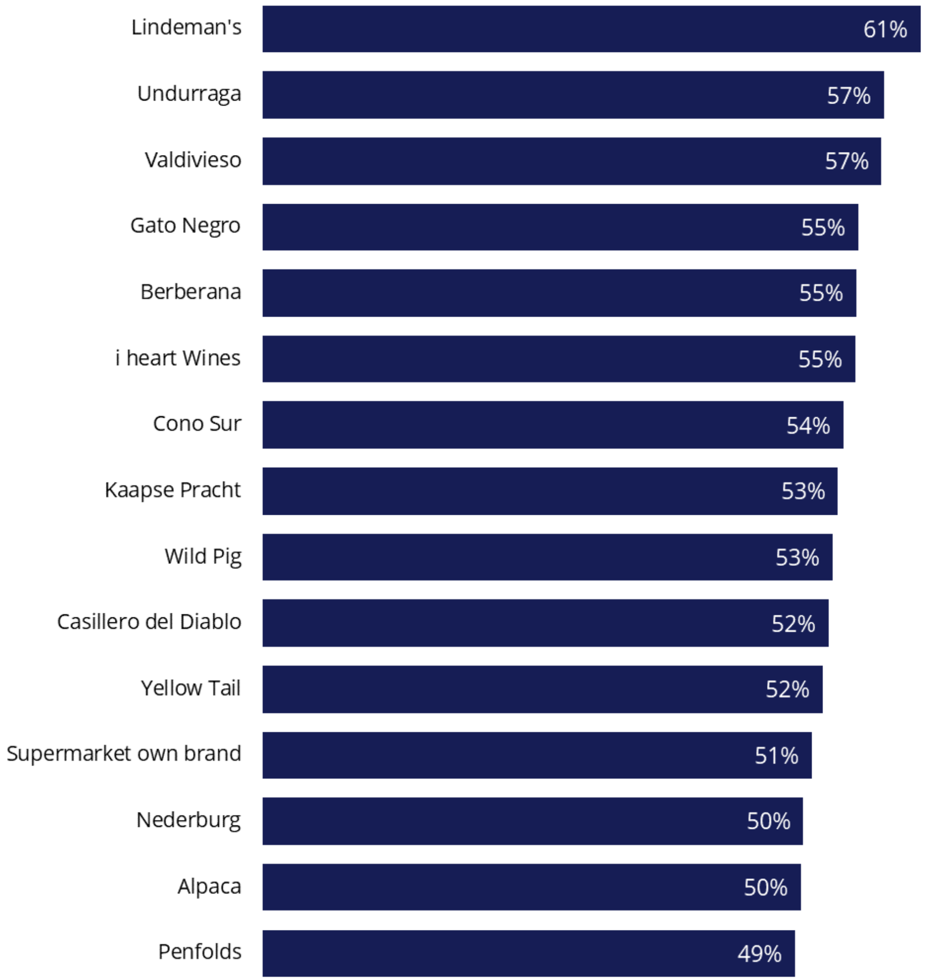
= Represents equal ranking
Grey shading: low sample size (n<50)
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Brand consideration

The gap between most of the top 15 brands measured by consideration incidence is relatively small

Consideration: Top 15

% who would consider buying the following brands
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Brand consideration: Tracking

Consideration levels are up for almost all of the top 30 brands

Consideration: Tracking

% who would consider buying the following brands
Base = Those who have heard of each brand

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Lindeman's	56%	54%	61%	↑	↑
2=	Undurraga	49%	50%	57%	↑	→
2=	Valdivieso	47%	46%	57%	↑	↑
4=	Gato Negro	55%	51%	55%	→	→
4=	Berberana	47%	48%	55%	→	→
4=	i heart Wines	n/a	45%	55%	n/a	→
7	Cono Sur	46%	37%	54%	→	↑
8=	Kaapse Pracht	53%	45%	53%	→	↑
8=	Wild Pig	56%	53%	53%	→	→
10=	Casillero del Diablo	46%	45%	52%	↑	↑
10=	Yellow Tail	49%	49%	52%	→	→
12	Supermarket own brand	53%	51%	51%	→	→
13=	Nederburg	35%	38%	50%	↑	↑
13=	Alpaca	n/a	45%	50%	n/a	→
15=	Penfolds	48%	39%	49%	→	→

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
15=	Alamos	n/a	33%	49%	n/a	↑
15=	Jacob's Creek	48%	44%	49%	→	→
18=	Mooi Kaap	47%	44%	48%	→	→
18=	Barefoot	n/a	47%	48%	n/a	→
18=	Maison Castel	n/a	28%	48%	n/a	↑
18=	La Tulipe	42%	42%	48%	→	→
18=	Banrock Station	39%	26%	48%	→	↑
23=	Torres	41%	39%	47%	→	↑
23=	Campo Viejo	44%	40%	47%	→	→
25=	Norton	44%	44%	46%	→	→
25=	Kumala	40%	47%	46%	→	→
27=	Stoney Creek	n/a	46%	43%	n/a	→
27=	Frontera	32%	36%	43%	↑	→
27=	Gallo Family Vineyards	47%	45%	43%	→	→
30	Grand Sud	44%	39%	42%	→	→

Results for all brands available in the data table

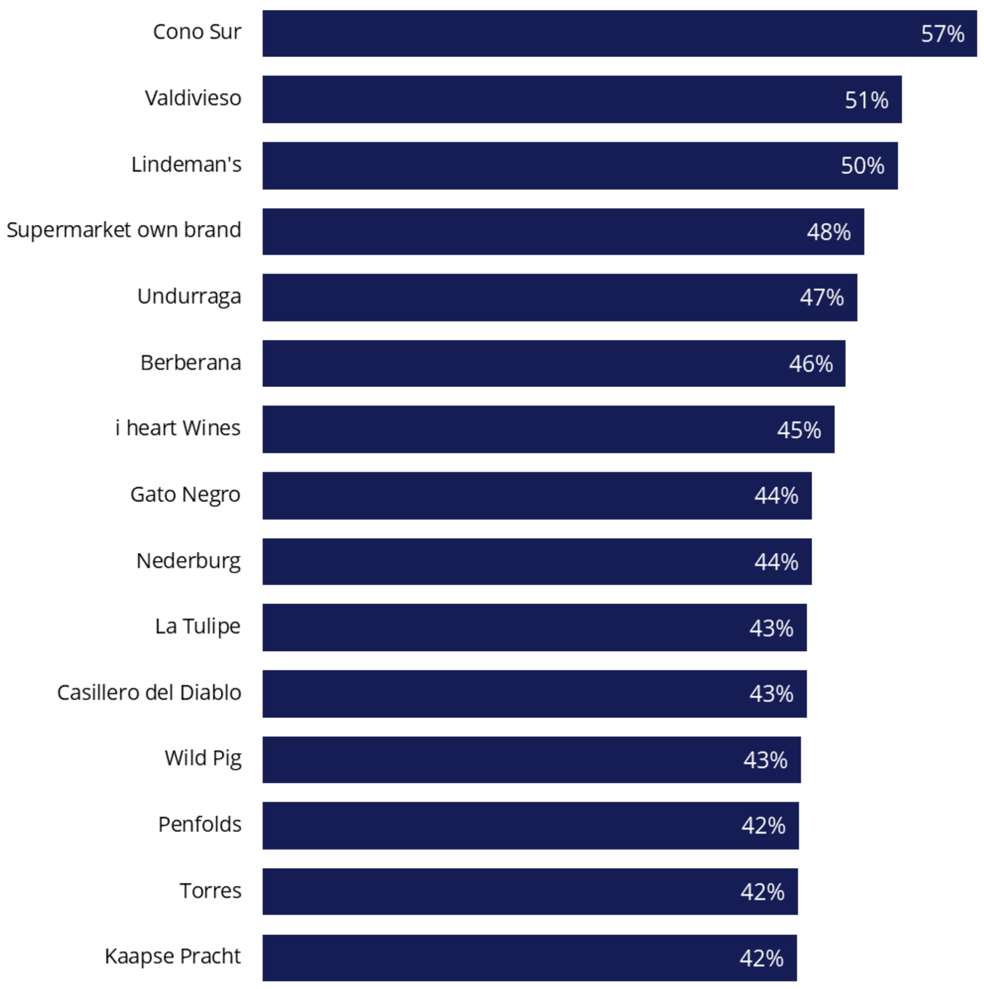
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Brand affinity

Chilean brand Cono Sur commands the top position for brand affinity, with approximately six in 10 Dutch believing that this brand is right for people like them

Affinity: Top 15

% who think the following brands are right for people like them
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Brand affinity: Tracking

Cono Sur has significantly increased its affinity incidence compared with 2019 and 2021

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Cono Sur	37%	31%	57%	↑	↑
2	Valdivieso	43%	42%	51%	→	→
3	Lindeman's	52%	49%	50%	→	→
4	Supermarket own brand	50%	52%	48%	→	→
5	Undurraga	44%	45%	47%	→	→
6	Berberana	42%	44%	46%	→	→
7	i heart Wines	n/a	50%	45%	n/a	→
8=	Gato Negro	47%	45%	44%	→	→
8=	Nederburg	34%	31%	44%	↑	↑
10=	La Tulipe	38%	37%	43%	→	→
10=	Casillero del Diablo	42%	40%	43%	→	→
10=	Wild Pig	48%	45%	43%	→	→
13=	Penfolds	41%	33%	42%	→	→
13=	Torres	35%	34%	42%	↑	↑
13=	Kaapse Pracht	47%	43%	42%	→	→

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
13=	Yellow Tail	41%	41%	42%	→	→
17=	Norton	41%	37%	41%	→	→
17=	Mooi Kaap	42%	40%	41%	→	→
19	Kumala	38%	40%	39%	→	→
20=	Alamos	n/a	37%	38%	n/a	→
20=	Jacob's Creek	44%	39%	38%	↓	→
20=	Campo Viejo	37%	38%	38%	→	→
23=	Frontera	29%	29%	37%	→	→
23=	Barefoot	n/a	41%	37%	n/a	→
23=	Stoney Creek	n/a	39%	37%	n/a	→
26=	Gallo Family Vineyards	42%	40%	36%	→	→
26=	Alpaca	n/a	40%	36%	n/a	→
28=	Les Dauphins	31%	29%	34%	→	→
28=	Hardys	36%	36%	34%	→	→
28=	Maison LaCheteau	28%	28%	34%	→	→

Results for all brands available in the data table

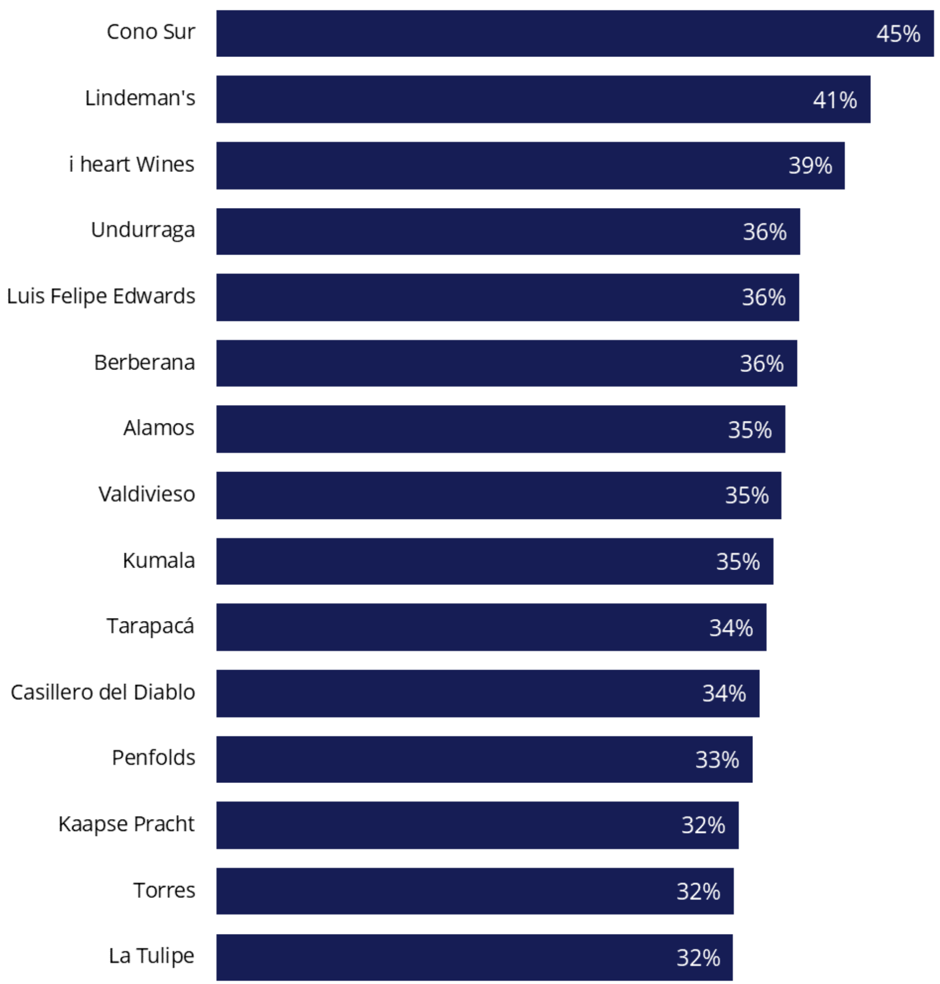
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Brand recommendation

As with brand affinity, Cono Sur is the highest ranking brand for recommendation, with almost half of Dutch regular wine drinkers likely to recommend the brand to a friend

Recommendation: Top 15

% who would recommend the following brands to a friend
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac®, Netherlands, Apr '22, (n=1,009) Dutch regular wine drinkers

Brand recommendation: Tracking

Significantly more Dutch regular wine drinkers would recommend Cono Sur to a friend now compared to in 2019 and 2021

Recommendation: Tracking

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
1	Cono Sur	24%	26%	45%	↑	↑
2	Lindeman's	41%	40%	41%	→	→
3	i heart Wines	n/a	30%	39%	n/a	→
4=	Undurraga	29%	30%	36%	→	→
4=	Luis Felipe Edwards	29%	26%	36%	→	→
4=	Berberana	28%	35%	36%	→	→
7=	Alamos	n/a	24%	35%	n/a	↑
7=	Valdivieso	32%	35%	35%	→	→
7=	Kumala	27%	28%	35%	→	→
10=	Tarapacá	n/a	21%	34%	n/a	→
10=	Casillero del Diablo	29%	34%	34%	→	→
12	Penfolds	28%	24%	33%	→	→
13=	Kaapse Pracht	32%	30%	32%	→	→
13=	Torres	27%	27%	32%	→	→
13=	La Tulipe	26%	28%	32%	→	→

Ranking '22		2019 (n=2,017)	2021 (n=2,000)	2022 (n=1,009)	Tracking vs. '19	Tracking vs. '21
16=	Gato Negro	32%	32%	31%	→	→
16=	Campo Viejo	26%	26%	31%	→	→
16=	Yellow Tail	28%	31%	31%	→	→
16=	Banrock Station	21%	16%	31%	→	↑
20	Barefoot	n/a	34%	30%	n/a	→
21=	Wild Pig	36%	35%	29%	↓	↓
21=	Nederburg	24%	19%	29%	→	↑
21=	Norton	23%	27%	29%	→	→
24=	Stoney Creek	n/a	27%	28%	n/a	→
24=	Santa Alicia	25%	25%	28%	→	→
24=	Gallo Family Vineyards	29%	28%	28%	→	→
24=	Mouton Cadet	33%	32%	28%	→	→
28=	Alpaca	n/a	27%	27%	n/a	→
28=	Jacob's Creek	28%	25%	27%	→	→
28=	Pasqua	n/a	21%	27%	n/a	→

Results for all brands available in the data table

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Source: Wine Intelligence, Vinitrac®, Netherlands, Mar '19, Jan & July '21, Apr '22, (n≥1,009) Dutch regular wine drinkers

Research Methodology

Netherlands Wine Landscapes

2022

Research methodology

QUANTITATIVE

Data has been collected in the Netherlands since March 2014

The waves March 2019, January and July 2021 were tracked against April 2022

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

Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought 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 age and gender*

The distribution of the sample is shown in the table:

		Mar-19	*Jan + Jul-21*	*Apr-22*
	n=	*2,017*	*2,000*	*1,009*
Gender	Male	52%	48%	45%
	Female	48%	52%	55%
	Total	***100%***	***100%***	***99%***
Age	18-24	10%	11%	10%
	25-34	15%	14%	14%
	35-44	18%	18%	13%
	45-54	17%	18%	16%
	55 and over	40%	39%	47%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac® Netherlands, March 2019 - April 2022 (n ≥ 1009) Dutch regular wine drinkers

**Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas*

Research methodology

QUALITATIVE

Market interviews were conducted with five experienced industry professionals in the Dutch wine trade in 2022.

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 wine-industry professionals working within the market in the following different roles:

- Wine consultant
- 2 x Wine importer
- Wine buyer
- Market analyst

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Wine Intelligence Ltd: Nutmeg House, 60 Gainsford Street, London SE1 2NY
Tel: 020 8194 0090. E-mail: info@wineintelligence.com
Registered in England as a limited company number: 4375306

A division of the IWSR Group

Wine Intelligence London (Head Office)

Nutmeg House
60 Gainsford Street
London
SE1 2NY

Telephone: +44 (0)20 8194 0090
E-mail: info@wineintelligence.com
Website: www.wineintelligence.com

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