

# Alcoholic Drinks in the Netherlands

June 2024

**Table of Contents** 

## Alcoholic Drinks in the Netherlands

## **EXECUTIVE SUMMARY**

Alcoholic drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

## MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Summary 1 - Number of On-trade Establishments by Type 2017-2023

## TAXATION AND DUTY LEVIES

Summary 2 - Taxation and Duty Levies on Alcoholic Drinks 2023

# OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

# KEY NEW PRODUCT LAUNCHES

Outlook

# MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

## MARKET DATA

- Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2018-2023
- Table 3 Sales of Alcoholic Drinks by Category: Total Value 2018-2023
- Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023
- Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023
- Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023
- Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023
- Table 10 GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023
- Table 11 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023
- Table 12 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023
- Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028
- Table 14 Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028
- Table 15 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028
- Table 16 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

# DISCLAIMER

## SOURCES

## Beer in the Netherlands

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Volume sales under pressure, but value sales see strong growth in 2023 due to price increases Low alcohol versions of dark beer brands drive category growth

Major brewers continue to invest in premium lager development

## PROSPECTS AND OPPORTUNITIES

Increase in taxation will be a challenge to volume development

Low alcohol and non-alcoholic variants of ales will boost beer sales in the coming years

Wider variety of low and non-alcoholic variants will emerge

## CATEGORY BACKGROUND

Lager price band methodology

Summary 4 - Lager by Price Band 2023

Table 17 - Number of Breweries 2018-2023

#### **CATEGORY DATA**

Table 18 - Sales of Beer by Category: Total Volume 2018-2023

Table 19 - Sales of Beer by Category: Total Value 2018-2023

Table 20 - Sales of Beer by Category: % Total Volume Growth 2018-2023

Table 21 - Sales of Beer by Category: % Total Value Growth 2018-2023

Table 22 - Sales of Beer by Off-trade vs On-trade: Volume 2018-2023

Table 23 - Sales of Beer by Off-trade vs On-trade: Value 2018-2023

Table 24 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023

Table 25 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023

Table 26 - Sales of Beer by Craft vs Standard 2018-2023

Table 27 - GBO Company Shares of Beer: % Total Volume 2019-2023

Table 28 - NBO Company Shares of Beer: % Total Volume 2019-2023

Table 29 - LBN Brand Shares of Beer: % Total Volume 2020-2023

Table 30 - Forecast Sales of Beer by Category: Total Volume 2023-2028

Table 31 - Forecast Sales of Beer by Category: Total Value 2023-2028

Table 32 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028

Table 33 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

# Cider/Perry in the Netherlands

# KEY DATA FINDINGS

# 2023 DEVELOPMENTS

Cider faces ongoing decline in the Netherlands

Demand for cider is low and there is little marketing and promotion

Non-alcoholic cider outperforms regular cider

## PROSPECTS AND OPPORTUNITIES

No major investment expected for cider in the coming years

Category in danger of collapse of distribution

High quality niche brands may still do well, despite a gloomy outlook for the category overall

# **CATEGORY DATA**

Table 34 - Sales of Cider/Perry: Total Volume 2018-2023

- Table 35 Sales of Cider/Perry: Total Value 2018-2023
- Table 36 Sales of Cider/Perry: % Total Volume Growth 2018-2023
- Table 37 Sales of Cider/Perry: % Total Value Growth 2018-2023
- Table 38 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023
- Table 39 Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023
- Table 40 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 41 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 42 GBO Company Shares of Cider/Perry: % Total Volume 2019-2023
- Table 43 NBO Company Shares of Cider/Perry: % Total Volume 2019-2023
- Table 44 LBN Brand Shares of Cider/Perry: % Total Volume 2020-2023
- Table 45 Forecast Sales of Cider/Perry: Total Volume 2023-2028
- Table 46 Forecast Sales of Cider/Perry: Total Value 2023-2028
- Table 47 Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028
- Table 48 Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

# Rtds in the Netherlands

# **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

RTDs outperform other alcoholic drinks categories in 2023

Hard seltzers continue to perform well, but are not a mainstream success

Soft drinks manufacturer Vrumona enters non-alcoholic RTDs in 2023

## PROSPECTS AND OPPORTUNITIES

Positive outlook for RTDs, but wine-based RTDs will see a further decline

STËLZ and GiG brands will continue to appeal to younger Dutch consumers

Justifying the price difference between non-alcoholic RTDs and soft drinks will be a challenge for players in the years ahead

# CATEGORY DATA

- Table 49 Sales of RTDs by Category: Total Volume 2018-2023
- Table 50 Sales of RTDs by Category: Total Value 2018-2023
- Table 51 Sales of RTDs by Category: % Total Volume Growth 2018-2023
- Table 52 Sales of RTDs by Category: % Total Value Growth 2018-2023
- Table 53 Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
- Table 54 Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
- Table 55 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 56 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 57 GBO Company Shares of RTDs: % Total Volume 2019-2023
- Table 58 NBO Company Shares of RTDs: % Total Volume 2019-2023
- Table 59 LBN Brand Shares of RTDs: % Total Volume 2020-2023
- Table 60 Forecast Sales of RTDs by Category: Total Volume 2023-2028
- Table 61 Forecast Sales of RTDs by Category: Total Value 2023-2028
- Table 62 Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
- Table 63 Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

# Spirits in the Netherlands

# **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Spirits more or less static in terms of sales volume development in 2023

Interest in cocktails and mixes drives growth of spirits

Various subcategories including domestic spirits suffer from maturity

## PROSPECTS AND OPPORTUNITIES

Dutch consumers are less price sensitive when it comes to spirits

Cocktail trend will help development of international spirits brands

English gin will see slower growth and Dutch gin will continue to decline

## CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology Summary 5 - Benchmark Brands 2023

#### **CATEGORY DATA**

- Table 64 Sales of Spirits by Category: Total Volume 2018-2023
- Table 65 Sales of Spirits by Category: Total Value 2018-2023
- Table 66 Sales of Spirits by Category: % Total Volume Growth 2018-2023
- Table 67 Sales of Spirits by Category: % Total Value Growth 2018-2023
- Table 68 Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023
- Table 69 Sales of Spirits by Off-trade vs On-trade: Value 2018-2023
- Table 70 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 71 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 72 Sales of Dark Rum by Price Platform: % Total Volume 2018-2023
- Table 73 Sales of White Rum by Price Platform: % Total Volume 2018-2023
- Table 74 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2018-2023
- Table 75 Sales of English Gin by Price Platform: % Total Volume 2018-2023
- Table 76 Sales of Vodka by Price Platform: % Total Volume 2018-2023
- Table 77 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2018-2023
- Table 78 GBO Company Shares of Spirits: % Total Volume 2019-2023
- Table 79 NBO Company Shares of Spirits: % Total Volume 2019-2023
- Table 80 LBN Brand Shares of Spirits: % Total Volume 2020-2023
- Table 81 Forecast Sales of Spirits by Category: Total Volume 2023-2028
- Table 82 Forecast Sales of Spirits by Category: Total Value 2023-2028
- Table 83 Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028
- Table 84 Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

## Wine in the Netherlands

# **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Ageing consumer base remains an issue for wine in the Netherlands in 2023 Other sparkling wine performs relatively well compared with champagne Brands names do not play a major role in sales of wine in the Netherlands

# PROSPECTS AND OPPORTUNITIES

Further price increases will likely lead to ongoing off-trade volume decline Various categories will fail to attract younger consumers Light and refreshing wines will likely drive category growth in the coming years

# CATEGORY DATA

- Table 85 Sales of Wine by Category: Total Volume 2018-2023
- Table 86 Sales of Wine by Category: Total Value 2018-2023
- Table 87 Sales of Wine by Category: % Total Volume Growth 2018-2023
- Table 88 Sales of Wine by Category: % Total Value Growth 2018-2023
- Table 89 Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
- Table 90 Sales of Wine by Off-trade vs On-trade: Value 2018-2023

- Table 91 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
- Table 92 Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
- Table 93 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 94 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 95 Sales of Still White Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 96 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2018-2023
- Table 97 GBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
- Table 98 NBO Company Shares of Still Light Grape Wine: % Total Volume 2019-2023
- Table 99 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2020-2023
- Table 100 GBO Company Shares of Champagne: % Total Volume 2019-2023
- Table 101 NBO Company Shares of Champagne: % Total Volume 2019-2023
- Table 102 LBN Brand Shares of Champagne: % Total Volume 2020-2023
- Table 103 GBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
- Table 104 NBO Company Shares of Other Sparkling Wine: % Total Volume 2019-2023
- Table 105 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2020-2023
- Table 106 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
- Table 107 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2019-2023
- Table 108 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2020-2023
- Table 109 GBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
- Table 110 NBO Company Shares of Non-grape Wine: % Total Volume 2019-2023
- Table 111 LBN Brand Shares of Non-grape Wine: % Total Volume 2020-2023
- Table 112 Forecast Sales of Wine by Category: Total Volume 2023-2028
- Table 113 Forecast Sales of Wine by Category: Total Value 2023-2028
- Table 114 Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
- Table 115 Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/alcoholic-drinks-in-the-netherlands/report.