

# Alcoholic Drinks in the Netherlands

June 2023

Table of Contents

## EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 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

Table 1 - Number of On-trade Establishments by Type 2016-2022

## TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2022

## OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

## KEY NEW PRODUCT LAUNCHES

Outlook

## MARKET INDICATORS

Table 2 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

## MARKET DATA

Table 3 - Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Table 4 - Sales of Alcoholic Drinks by Category: Total Value 2017-2022

Table 5 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

Table 6 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022

Table 10 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022

Table 11 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022

Table 12 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022

Table 13 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027

Table 15 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027

Table 17 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

## DISCLAIMER

## SOURCES

## Summary 2 - Research Sources

### Beer in the Netherlands

#### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

On-trade sales surge while off-trade falters: beer category shifts post-pandemic  
Non alcoholic beer experiences decline in off-trade sales but still shows strong potential  
Heineken's latest launch aims to boost lager consumption among young adults

#### PROSPECTS AND OPPORTUNITIES

Positive outlook for beer  
Challenges threaten the future of small and mid-sized breweries  
Heineken use new launches to increase the appeal of beer to young consumers

#### CATEGORY BACKGROUND

Lager price band methodology  
Summary 3 - Lager by Price Band 2022  
Table 18 - Number of Breweries 2017-2022

#### CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2017-2022  
Table 20 - Sales of Beer by Category: Total Value 2017-2022  
Table 21 - Sales of Beer by Category: % Total Volume Growth 2017-2022  
Table 22 - Sales of Beer by Category: % Total Value Growth 2017-2022  
Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022  
Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022  
Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022  
Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022  
Table 27 - Sales of Beer by Craft vs Standard 2017-2022  
Table 28 - GBO Company Shares of Beer: % Total Volume 2018-2022  
Table 29 - NBO Company Shares of Beer: % Total Volume 2018-2022  
Table 30 - LBN Brand Shares of Beer: % Total Volume 2019-2022  
Table 31 - Forecast Sales of Beer by Category: Total Volume 2022-2027  
Table 32 - Forecast Sales of Beer by Category: Total Value 2022-2027  
Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027  
Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

### Cider/Perry in the Netherlands

#### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Heineken reduces investment in cider/perry  
Success of non-alcoholic beer rubs off on non-alcoholic cider/perry  
Heineken's rationalisation process impacts sales through supermarkets

#### PROSPECTS AND OPPORTUNITIES

Cider/perry set to decline as Dutch consumers show disinterest in these products  
Cider/perry could be facing an existential threat as competition from other products grows and investment dries up  
Distribution could be disrupted as Heineken reduces its investment

#### CATEGORY DATA

Table 35 - Sales of Cider/Perry: Total Volume 2017-2022

Table 36 - Sales of Cider/Perry: Total Value 2017-2022  
 Table 37 - Sales of Cider/Perry: % Total Volume Growth 2017-2022  
 Table 38 - Sales of Cider/Perry: % Total Value Growth 2017-2022  
 Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022  
 Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022  
 Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022  
 Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022  
 Table 43 - GBO Company Shares of Cider/Perry: % Total Volume 2018-2022  
 Table 44 - NBO Company Shares of Cider/Perry: % Total Volume 2018-2022  
 Table 45 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022  
 Table 46 - Forecast Sales of Cider/Perry: Total Volume 2022-2027  
 Table 47 - Forecast Sales of Cider/Perry: Total Value 2022-2027  
 Table 48 - Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027  
 Table 49 - Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

## RtDs in the Netherlands

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Spirit-based RTDs continue to thrive, but wine-based RTDs decline  
 Hard seltzers yet to cement a strong position in the Netherlands  
 Bacardi introduces premium batched cocktails with its new Tails range

### PROSPECTS AND OPPORTUNITIES

Increase in consumption of RTDs likely to be fuelled by cocktail trend  
 Consumers turning to alternative drinks as interest in wine-based RTDs declines  
 Doubts about development of other RTDs and non alcoholic RTDs

### CATEGORY DATA

Table 50 - Sales of RTDs by Category: Total Volume 2017-2022  
 Table 51 - Sales of RTDs by Category: Total Value 2017-2022  
 Table 52 - Sales of RTDs by Category: % Total Volume Growth 2017-2022  
 Table 53 - Sales of RTDs by Category: % Total Value Growth 2017-2022  
 Table 54 - Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022  
 Table 55 - Sales of RTDs by Off-trade vs On-trade: Value 2017-2022  
 Table 56 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022  
 Table 57 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022  
 Table 58 - GBO Company Shares of RTDs: % Total Volume 2018-2022  
 Table 59 - NBO Company Shares of RTDs: % Total Volume 2018-2022  
 Table 60 - LBN Brand Shares of RTDs: % Total Volume 2019-2022  
 Table 61 - Forecast Sales of RTDs by Category: Total Volume 2022-2027  
 Table 62 - Forecast Sales of RTDs by Category: Total Value 2022-2027  
 Table 63 - Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027  
 Table 64 - Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

## Spirits in the Netherlands

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Shift in sales volume from off-trade to on-trade as bars reopen  
 Consumers turn to at-home cocktails, boosting sales of key components  
 Jack Daniel's introduces two new Bottled-In-Bond whiskies in late 2022

## PROSPECTS AND OPPORTUNITIES

Manufacturers and retailers no longer able to absorb rising costs

Healthy growth for non alcoholic spirits, but unlikely to become major mainstream spirits category

Spirits associated with cocktails and mixes expected to perform well

## CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 4 - Benchmark Brands 2022

## CATEGORY DATA

Table 65 - Sales of Spirits by Category: Total Volume 2017-2022

Table 66 - Sales of Spirits by Category: Total Value 2017-2022

Table 67 - Sales of Spirits by Category: % Total Volume Growth 2017-2022

Table 68 - Sales of Spirits by Category: % Total Value Growth 2017-2022

Table 69 - Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022

Table 70 - Sales of Spirits by Off-trade vs On-trade: Value 2017-2022

Table 71 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 72 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022

Table 73 - Sales of Dark Rum by Price Platform: % Total Volume 2017-2022

Table 74 - Sales of White Rum by Price Platform: % Total Volume 2017-2022

Table 75 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022

Table 76 - Sales of English Gin by Price Platform: % Total Volume 2017-2022

Table 77 - Sales of Vodka by Price Platform: % Total Volume 2017-2022

Table 78 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022

Table 79 - GBO Company Shares of Spirits: % Total Volume 2018-2022

Table 80 - NBO Company Shares of Spirits: % Total Volume 2018-2022

Table 81 - LBN Brand Shares of Spirits: % Total Volume 2019-2022

Table 82 - Forecast Sales of Spirits by Category: Total Volume 2022-2027

Table 83 - Forecast Sales of Spirits by Category: Total Value 2022-2027

Table 84 - Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027

Table 85 - Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

## Wine in the Netherlands

## KEY DATA FINDINGS

## 2022 DEVELOPMENTS

Contrasting fortunes for on-trade and off-trade sales of wine

White, rosé, and sparkling wine are popular and perform well during the warm summer months, but New World wine struggles

Department store HEMA introduces sustainable private label wine range

## PROSPECTS AND OPPORTUNITIES

Long-term recovery projected for wine despite poor performance in 2022

Positive outlook for non-alcoholic wine, but category unlikely to become mainstream

Sparkling wine to thrive with increased consumer interest

## CATEGORY DATA

Table 86 - Sales of Wine by Category: Total Volume 2017-2022

Table 87 - Sales of Wine by Category: Total Value 2017-2022

Table 88 - Sales of Wine by Category: % Total Volume Growth 2017-2022

Table 89 - Sales of Wine by Category: % Total Value Growth 2017-2022

Table 90 - Sales of Wine by Off-trade vs On-trade: Volume 2017-2022

Table 91 - Sales of Wine by Off-trade vs On-trade: Value 2017-2022

Table 92 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 93 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022

Table 94 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022

Table 95 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022

Table 96 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022

Table 97 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022

Table 98 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 99 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 100 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022

Table 101 - GBO Company Shares of Champagne: % Total Volume 2018-2022

Table 102 - NBO Company Shares of Champagne: % Total Volume 2018-2022

Table 103 - LBN Brand Shares of Champagne: % Total Volume 2019-2022

Table 104 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 105 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 106 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022

Table 107 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 108 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 109 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022

Table 110 - GBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 111 - NBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 112 - LBN Brand Shares of Non-grape Wine: % Total Volume 2019-2022

Table 113 - Forecast Sales of Wine by Category: Total Volume 2022-2027

Table 114 - Forecast Sales of Wine by Category: Total Value 2022-2027

Table 115 - Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027

Table 116 - Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

## 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](https://www.euromonitor.com/alcoholic-drinks-in-the-netherlands/report).