

Alcoholic Drinks in the Netherlands

Market Direction | 2023-06-26 | 77 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

In 2022, the full reopening of on-trade establishments had a significant impact on the development of alcoholic drinks in the Netherlands. This was due to the fact that on-trade outlets had been closed for extended periods during the pandemic and once they were finally able to reopen it provided a much-needed boost to sales of alcoholic drinks. As a result, alcoholic drinks experienced a strong recovery in on-trade volume terms in 2022 with the total volume of litres sold approaching pre-pandemi...

Euromonitor International's Alcoholic Drinks in Netherlands report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2018-2022), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution or pricing issues. Forecasts to 2027 illustrate how the market is set to change.

Product coverage: Beer, Cider/Perry, RTDs, Spirits, Wine.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Alcoholic Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Table of Contents:

Alcoholic Drinks in the Netherlands Euromonitor International June 2023

List Of Contents And Tables

ALCOHOLIC DRINKS IN THE NETHERLANDS

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

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

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

Table 16 \square 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

WINE IN THE NETHERLANDS

KEY DATA FINDINGS

2022 DEVELOPMENTS

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

White, rose, 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

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

CATEGORY DATA

Table 35 Sales of Wine by Category: Total Volume 2017-2022

Table 36 Sales of Wine by Category: Total Value 2017-2022

Table 37 Sales of Wine by Category: % Total Volume Growth 2017-2022

Table 38 Sales of Wine by Category: % Total Value Growth 2017-2022

Table 39 Sales of Wine by Off-trade vs On-trade: Volume 2017-2022

Table 40 Sales of Wine by Off-trade vs On-trade: Value 2017-2022

Table 41 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 42 Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022

Table 43 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022

Table 44 ∏Sales of Still Rose Wine by Price Segment: % Off-trade Volume 2017-2022

Table 46 ∏Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022

Table 47 ∏GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022

Table 49 [LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022

Table 50 ☐GBO Company Shares of Champagne: % Total Volume 2018-2022

Table 51 ☐NBO Company Shares of Champagne: % Total Volume 2018-2022

Table 52 [LBN Brand Shares of Champagne: % Total Volume 2019-2022

Table 53 ☐GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 54 NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022

Table 55 [LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022

Table 56 ∏GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022

Table 58 ∏LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022

Table 59 ☐GBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 60 ☐NBO Company Shares of Non-grape Wine: % Total Volume 2018-2022

Table 61 ☐LBN Brand Shares of Non-grape Wine: % Total Volume 2019-2022

Table 62 [Forecast Sales of Wine by Category: Total Volume 2022-2027

Table 63 ☐Forecast Sales of Wine by Category: Total Value 2022-2027

Table 64 [Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027

Table 65 ☐ Forecast Sales of Wine 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 66 Sales of Spirits by Category: Total Volume 2017-2022

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

Table 67 Sales of Spirits by Category: Total Value 2017-2022

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

Table 69 Sales of Spirits by Category: % Total Value Growth 2017-2022

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

Table 71 Sales of Spirits by Off-trade vs On-trade: Value 2017-2022

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

Table 73 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022

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

Table 75 Sales of White Rum by Price Platform: % Total Volume 2017-2022

Table 76 [Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022

Table 77 ☐ Sales of English Gin by Price Platform: % Total Volume 2017-2022

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

Table 81 NBO Company Shares of Spirits: % Total Volume 2018-2022

Table 82 [LBN Brand Shares of Spirits: % Total Volume 2019-2022

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

Table 84 [Forecast Sales of Spirits by Category: Total Value 2022-2027

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

Table 86 \square Forecast Sales of Spirits 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 87 Sales of Cider/Perry: Total Volume 2017-2022

Table 88 Sales of Cider/Perry: Total Value 2017-2022

Table 89 Sales of Cider/Perry: % Total Volume Growth 2017-2022

Table 90 Sales of Cider/Perry: % Total Value Growth 2017-2022

Table 91 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2017-2022

Table 92 Sales of Cider/Perry by Off-trade vs On-trade: Value 2017-2022

Table 93 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 94 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2017-2022

Table 95 GBO Company Shares of Cider/Perry: % Total Volume 2018-2022

Table 96 ☐NBO Company Shares of Cider/Perry: % Total Volume 2018-2022

Table 97 [LBN Brand Shares of Cider/Perry: % Total Volume 2019-2022

Table 98 ☐Forecast Sales of Cider/Perry: Total Volume 2022-2027

Table 99 \square Forecast Sales of Cider/Perry: Total Value 2022-2027

Table 100 [Forecast Sales of Cider/Perry: % Total Volume Growth 2022-2027

Table 101 [Forecast Sales of Cider/Perry: % Total Value Growth 2022-2027

RTDS IN THE NETHERLANDS

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

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 102 Sales of RTDs by Category: Total Volume 2017-2022

Table 103 Sales of RTDs by Category: Total Value 2017-2022

Table 104 Sales of RTDs by Category: % Total Volume Growth 2017-2022

Table 105 Sales of RTDs by Category: % Total Value Growth 2017-2022

Table 106 Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022

Table 107 Sales of RTDs by Off-trade vs On-trade: Value 2017-2022

Table 108 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 109 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022

Table 110 GBO Company Shares of RTDs: % Total Volume 2018-2022

Table 111 ☐NBO Company Shares of RTDs: % Total Volume 2018-2022

Table 112 [LBN Brand Shares of RTDs: % Total Volume 2019-2022

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

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

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

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



☐ - Print this form

To place an Order with Scotts International:

 $\hfill \Box$ - Complete the relevant blank fields and sign

Alcoholic Drinks in the Netherlands

Market Direction | 2023-06-26 | 77 pages | Euromonitor

Name* Last Name*	elect license	License			Price
Multiple User License (Global) VAT Total e circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346. T will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Phone* Last Name* Last Name*					€1750.00
e circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346. T will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Phone* Last Name* Let*		Multiple User License (1 Site)			€3500.00
Total e circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346. T will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat * Phone* Last Name* Lest Name*		Multiple User License (Global)		€5250.00
e circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346. T will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Phone* Last Name*					
* Phone* Last Name* Last Name*				Tota	al
ile*	_			companies who are unable to provide	a valid LO vaci
	mail*	2370 for Foliair Bused Corr		companies who are unable to provide	a valid Eo vac i
any Name* EU Vat / Tax ID / NIP number*	_	2378 for Foliair Bused Corr	Phone*	Companies who are unable to provide	a valid Eo vac i
	mail*	2378 for Foliair Bused Com	Phone*	Companies who are unable to provide	a valid Eo vac i
city*	mail* [irst Name* [2370 for Foliair Bused Com	Phone* Last Name*		a valid Eo vac i
ode* Country*	mail* [irst Name* [ob title*	2378 for Foliair Bused Com	Phone* Last Name* EU Vat / Tax ID		
Date 2025-05-04	mail* [irst Name* [ob title* [ompany Name* [23/8 for Foliair Bused Com	Phone* Last Name* EU Vat / Tax ID City*		
ode* Country*	mail*	2370 for Foliair Bused Corr	Phone*	Companies who are unable to provide	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com