



# THE WINE LANDSCAPE IN THE NETHERLANDS

Finding opportunities for New Zealand exporters.

Europe Market Research, Erin Maddren | November 2023



# Introduction to this report

## Background

Wine consumption in the Netherlands is continuing to grow. Partly, this is due to the increasing availability of high-quality wines from around the world, as well as Dutch consumers becoming more sophisticated in their wine tastes. Wine tourism and younger demographics drinking more wine are also highly influential factors.

## Purpose

The purpose of this research is to:

- 1) Provide New Zealand wine exporters with a deeper understanding of the wine landscape in the Netherlands.
- 2) Help New Zealand wine exporters identify opportunities for their products in the Netherlands and similar nearby markets in Europe.
- 3) Provide tangible tips and advice for entering the Netherlands wine sector successfully.

## Methodology

This report was generated primarily using desktop research, with NZTE subscriptions and publicly available information. Key sources of data are listed below:

- Euromonitor International
- Statista
- GlobalWebIndex
- ITC Trade Map

We have also conducted an interview with a wine industry expert to gain deeper insights. See the [next page](#) for details.

## Limitations

Most of the information provided in this report was sourced from secondary data sources. Due to the nature of secondary data, all values and figures should be treated as indicative, rather than absolute. The latest information available at the time of research was used, however present values may differ.

## Expert insights

In this report we include commentary and insights from a wine industry expert in the Netherlands.



### **Koen Opperman** *Wine Director & Sommelier*

Koen is a wine expert in the Netherlands with over 13 years of experience in the hospitality and wine industry, including acclaimed hotels and various Michelin starred restaurants. Koen has also pursued advanced wine studies at the Cape Wine Academy in South Africa.

As the Wine Director at Hotel V & The Lobby and the Founder of Vintage Wines Amsterdam, Koen continues to shape unique and memorable experiences for wine enthusiasts and diners.



Expert insights are marked with a light bulb icon throughout the report.

## KEY FINDINGS SUMMARY

Consumers in the Netherlands love wine, especially imports, since local production is minimal. Unlike traditional European tastes, the Netherlands boasts a modern culinary scene, perfect for introducing new world wines with more contemporary branding and positioning.

Frequent wine drinkers in the Netherlands are more interested in arts, culture, dining, and socialising than the general population—making foodservice and events key entry points.

To learn from competing wine countries, South Africa entered the market with extremely low prices through standard retail formats, which has led to some negative perceptions of their wine quality.

New Zealand's market approach should adopt a 'top-down' strategy, initially establishing a presence in premium foodservice and events to build positioning. Subsequently, products can be introduced to alcohol and wine stores at a premium price point, leveraging the positive associations consumers have from experiencing exceptional wines at their favourite restaurants.

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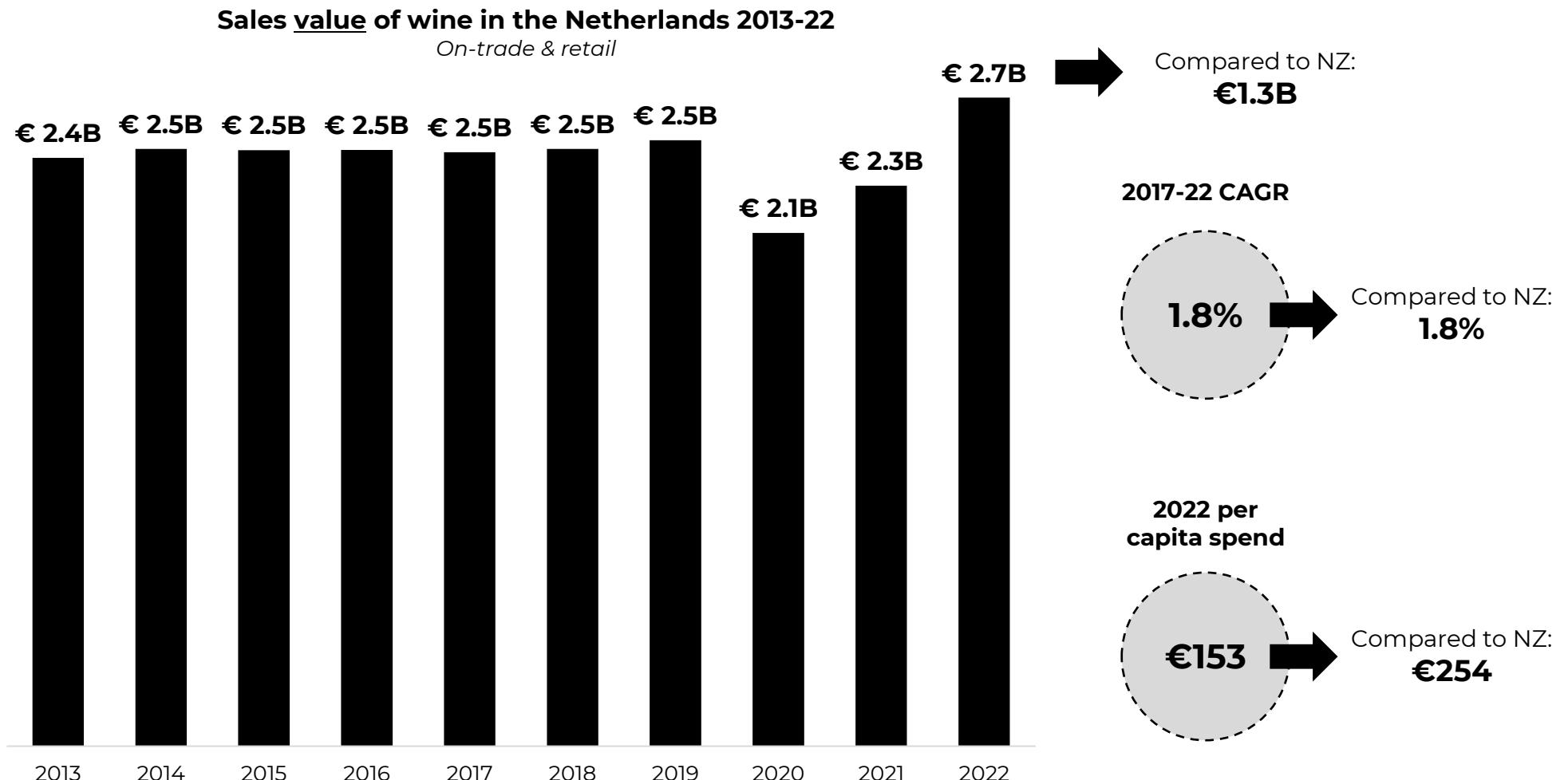
SECTION 1

# THE MARKET OPPORTUNITY

# Per capita, consumers in the Netherlands and New Zealand drink similar amounts of wine, albeit it is slightly higher in the Netherlands.



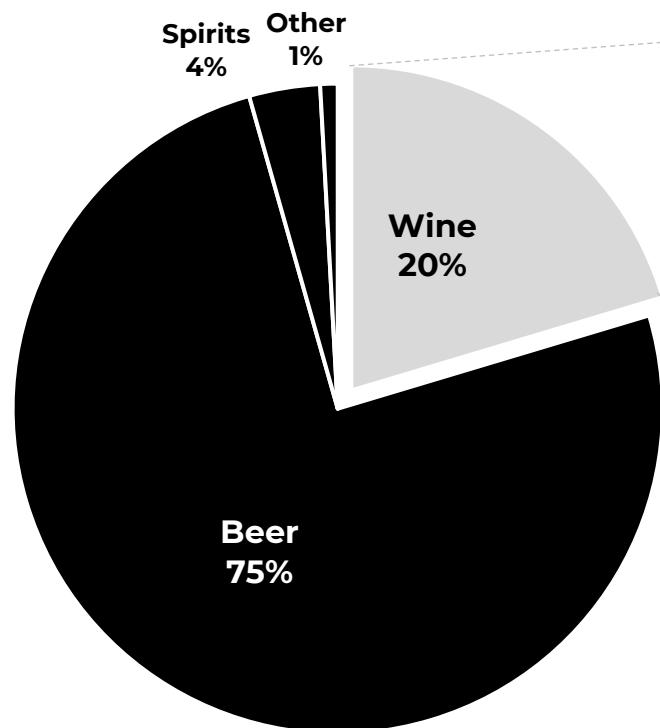
**Consumers in the Netherlands are drinking a similar amount of wine to New Zealand yet spending a lot less, indicating a potentially lower average price point.**



**By volume, still grape wine makes up the majority of wine sales. It equates to 92%.**

**Alcohol sales volume in 2022 by type**

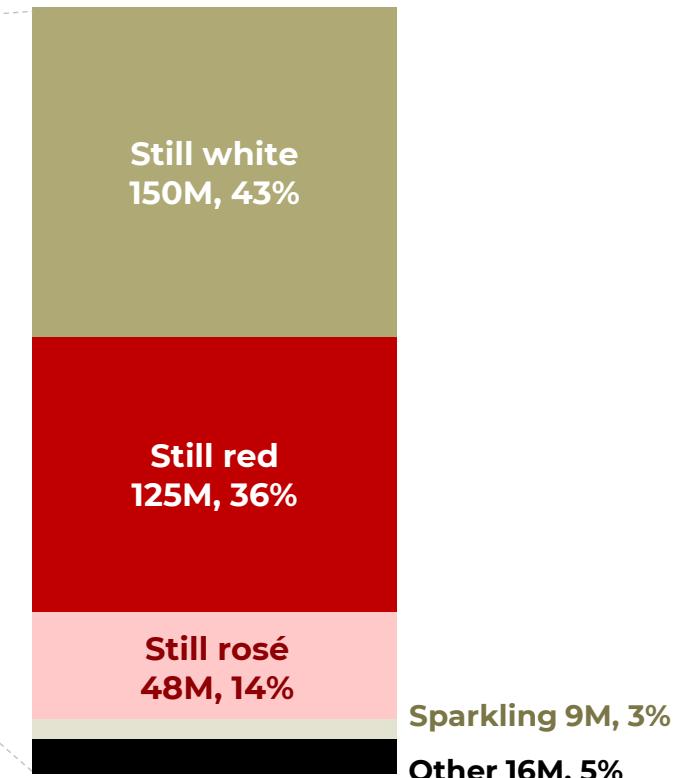
*On-trade & retail*



Total alcohol sales volume: **1.7 billion litres**

**Wine sales volume in 2022 by type**

*In million litres, On-trade & retail*

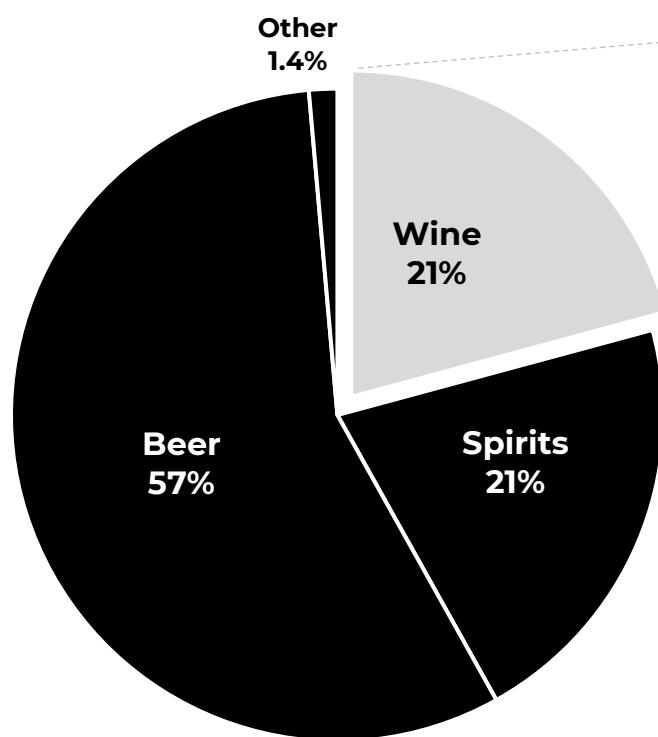


Total wine sales volume: **349 million litres**

**However, by value terms, sparkling makes up a larger portion of sales. Nevertheless, still grape wine makes up 79% of total value.**

**Alcohol sales value in 2022 by type**

*On-trade & retail*



Total alcohol sales value: **€12.9 billion**

**Wine sales value in 2022 by type**

*On-trade & retail*



Total wine sales value: **€2.7 billion**

## Grüner Veltliner, a wine mostly from Eastern Europe, is growing in popularity.

### Top overall varietals by value in 2022



Merlot



Chardonnay

### Top growth varietals by value in 2022



Pinot Grigio



Grüner Veltliner



# The NZ-EU Free Trade Agreement will afford benefits to NZ wine exporters, including tariff removal & reduced regulatory burden.

On 9 July 2023 New Zealand and the European Union signed the NZ-EU Free Trade Agreement (FTA), which will modernise and reset the economic relationship between the EU and New Zealand. When in force this will unlock access to a market of 450 million people.

The NZ-EU FTA is not yet in force (as of Dec 2023) but is expected to enter into force by mid-2024. A timeline can be found [online here](#).

## Key highlights for wine:

<p><b>Tariffs will be eliminated immediately for Wine on entry into force or 'Day One' of the FTA</b></p>	<ul style="list-style-type: none"> <li>• Economic modelling estimates tariff savings of \$5.5 million NZD will be saved annually.</li> <li>• The current tariff is calculated at a maximum of ≤NZ\$55/100L. This is the 'Common Customs Tariff' (CCT). This equates to ~ €1.35 per case of wine (12 X 750ml bottles) but does depend on what wine i.e. HS code or CN code.</li> </ul>
<p><b>Reduction in the regulatory burden and costs for New Zealand wine and spirits producers exporting to the EU.</b></p>	<ul style="list-style-type: none"> <li>• Includes issues such as labelling requirements for wine, winemaking practices and certification. For example: <ul style="list-style-type: none"> <li>➢ Significantly increasing the number of winemaking practices and physical winemaking processes our winemakers can use in line with New Zealand laws and requirements (as opposed to EU requirements) for wine exported to the EU.</li> <li>➢ Widening the alcohol range winemakers can use when labelling their product as 'wine' in the EU, from the current range of 8.5% actual to 15% total alcoholic strength as regulated in the EU to 7% actual to 20% total alcoholic strength.</li> </ul> </li> </ul>
<p><b>Geographic Indicators have been agreed for wine.</b></p>	<p>23 New Zealand wine geographic indicators (GIs) will be protected (including Marlborough, Central Otago, Waiheke Island and Martinborough) alongside protected EU wine GIs.</p>

## Key takeaways



**Consumers in the Netherlands drink more wine than in New Zealand, by volume terms. However, they spend significantly less than in New Zealand (just under €100 less per capita), indicating that consumers may be, on average, willing to pay less for wine than they are in the New Zealand market.**



**The new free trade agreement between New Zealand and the European Union, that is coming into force in 2024, provides significant benefits to wine exporters. This includes removal of all tariffs, reducing regulatory burdens and costs, and protection of geographical indicators. This makes the Netherlands and other EU countries much more attractive. Exporters should seize the opportunities this provides.**

SECTION 2

## UNDERSTANDING CONSUMERS IN THE NETHERLANDS

## Wine drinkers lean slightly more towards female. The 55-64- and 25-34-year-olds make up the highest number of frequent wine consumers.

Frequent (at least once per month) consumers of wine in the Netherlands 2022/23: Gender

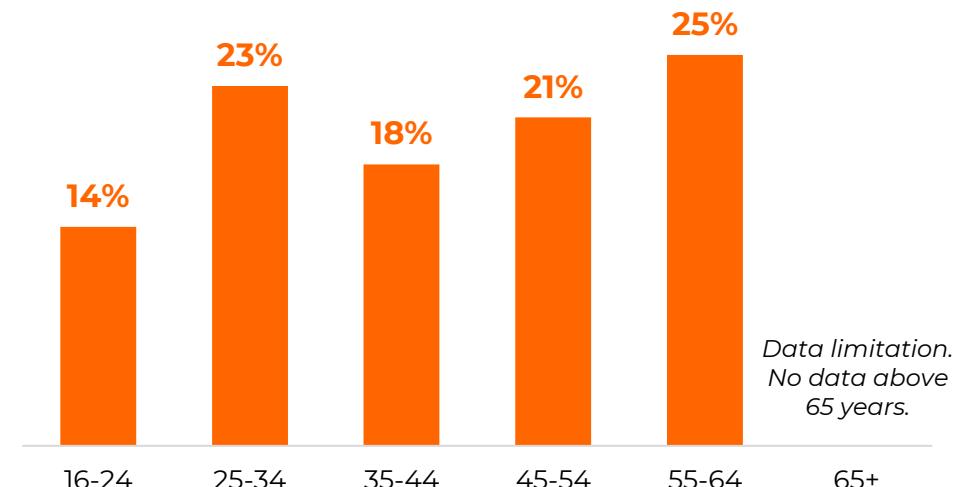


53%



47%

Frequent (at least once per month) consumers of wine in the Netherlands 2022/23\*\*: Age



\*Note, only female and male were offered as options in this survey, which may impact the accuracy of the data.

\*\*Note, data does not add up to 100% due to those who did not answer or were excluded from survey.

# A small share of consumers opt to purchase wine online, indicating the dominance of bricks & mortar and on-trade sales for the 37% who drink wine at least once per month in the Netherlands.

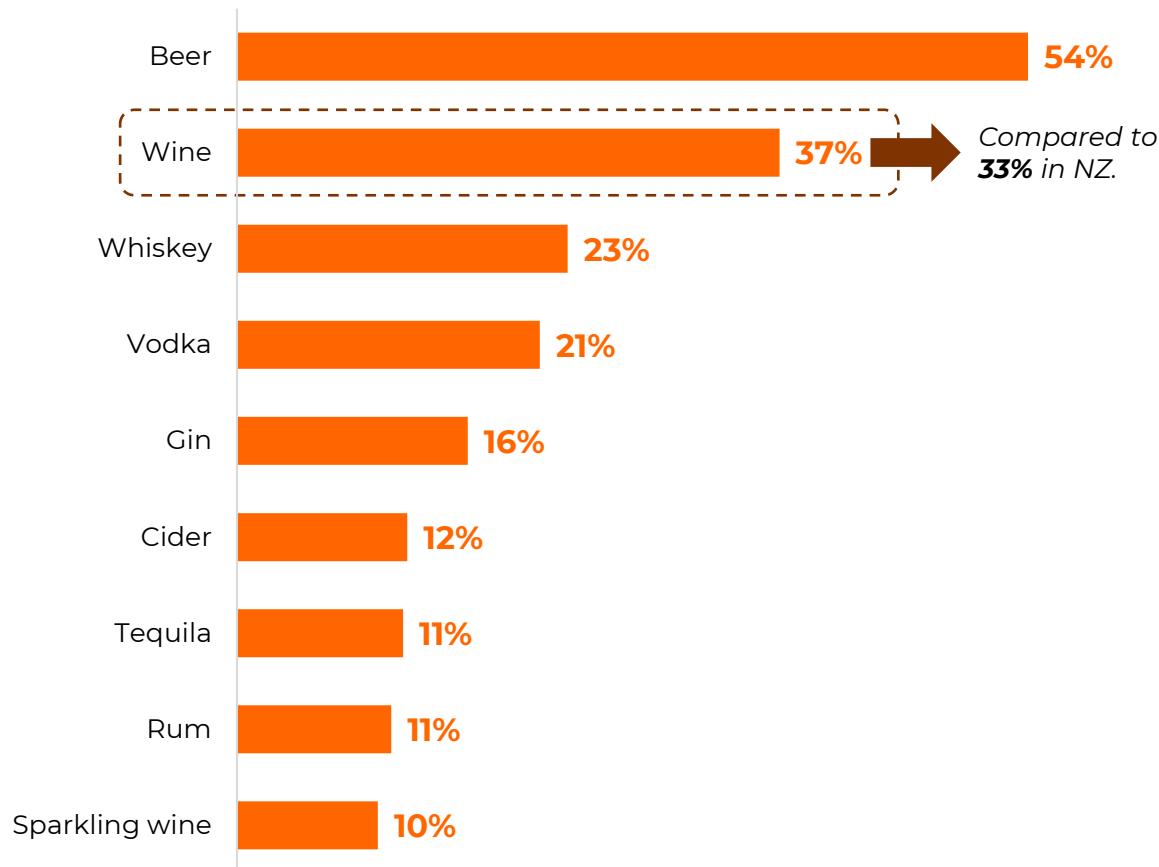
## Frequency of wine consumption of consumers in the Netherlands 2022/23\*



## Wine purchasing by consumers in the Netherlands 2022/2023\*



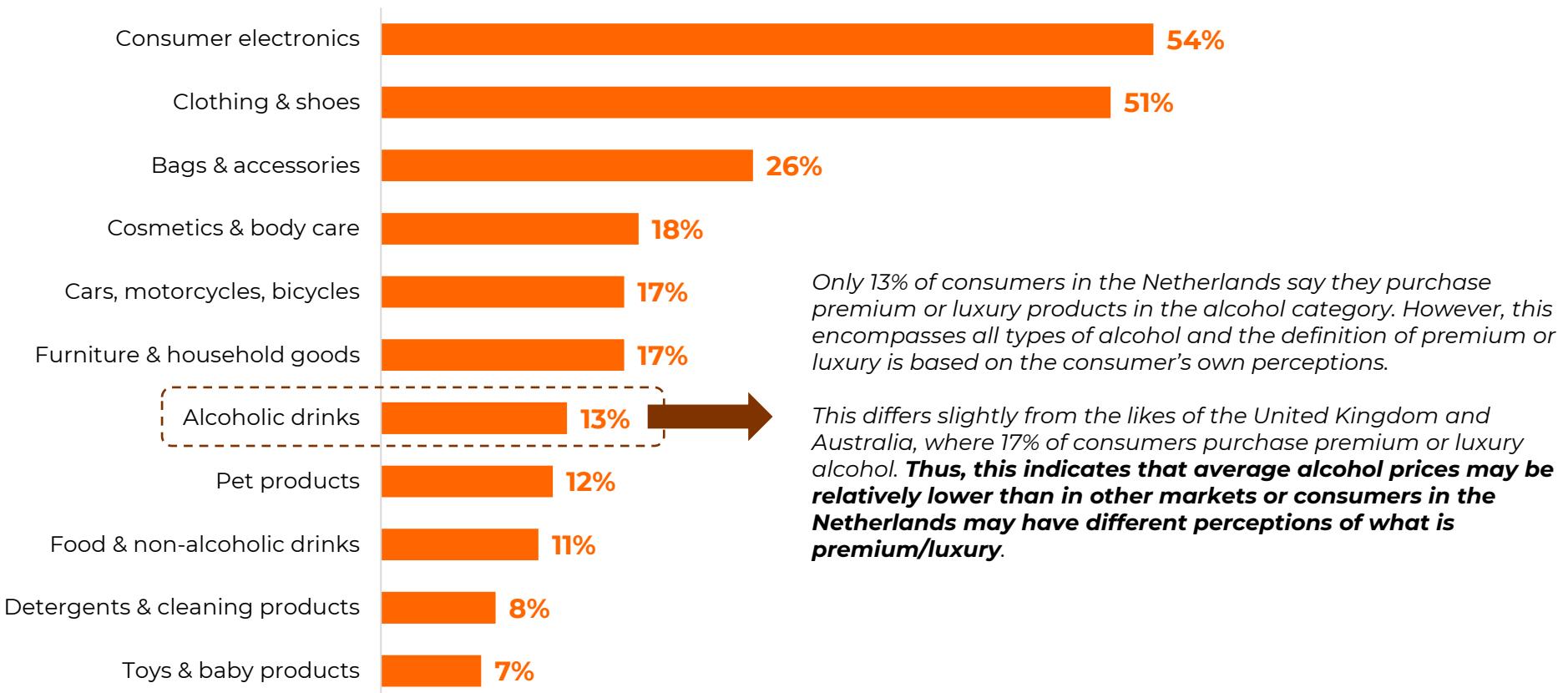
## Alcoholic beverages consumption frequency by type in Netherlands 2022/23\*: least once in the past month



# Consumers that purchase premium or luxury alcohol is 13%. It is important to investigate what consumers define as premium.

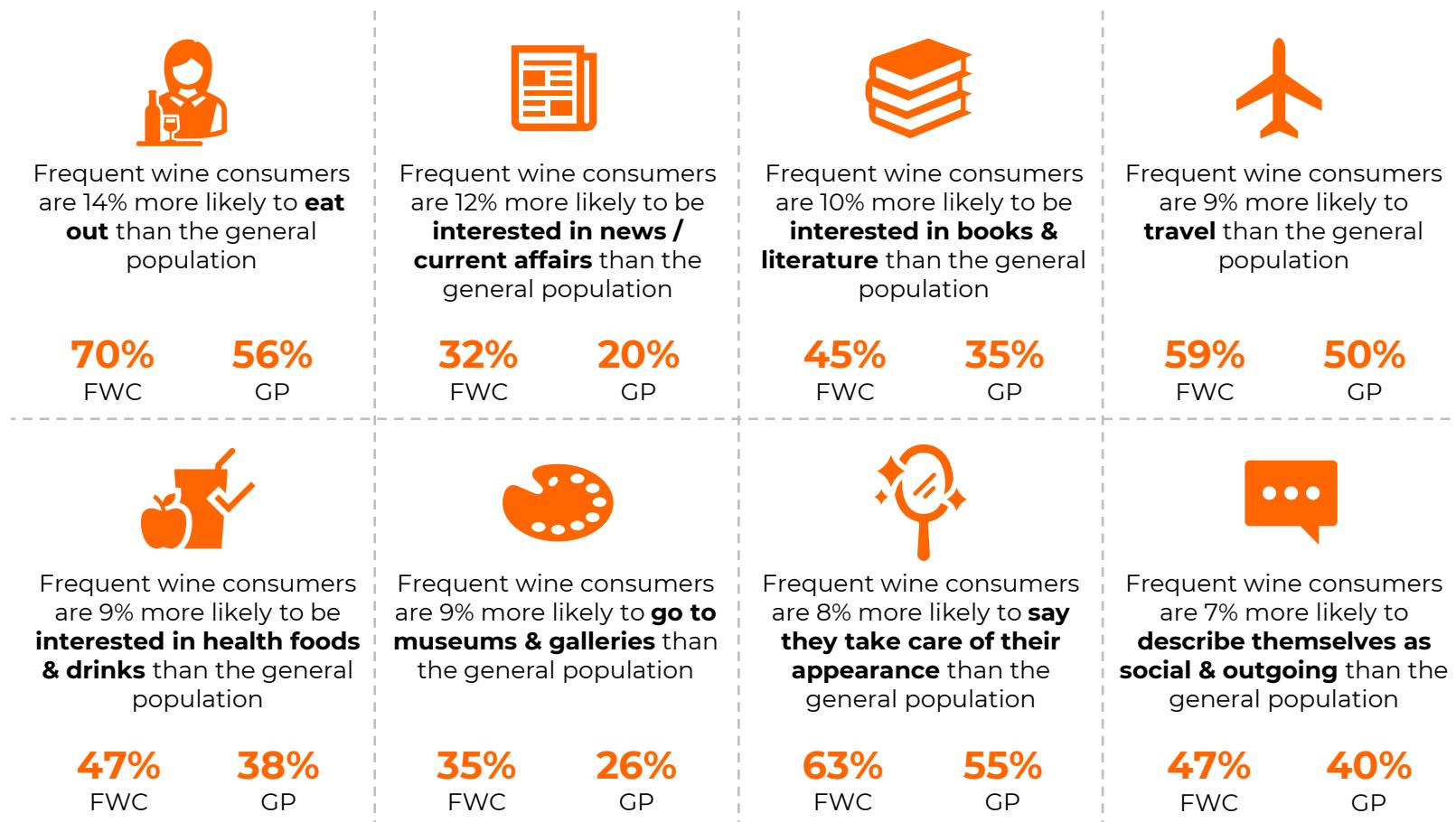
## Importance of luxury/premium products for consumers in the Netherlands by category 2023

'In which of these product categories do you buy premium or luxury items?' (Multi-pick)



# Frequent wine consumers in the Netherlands are more likely than the general population to be interested in arts & culture, travel and health. They are also more likely to self-describe as social and outgoing.

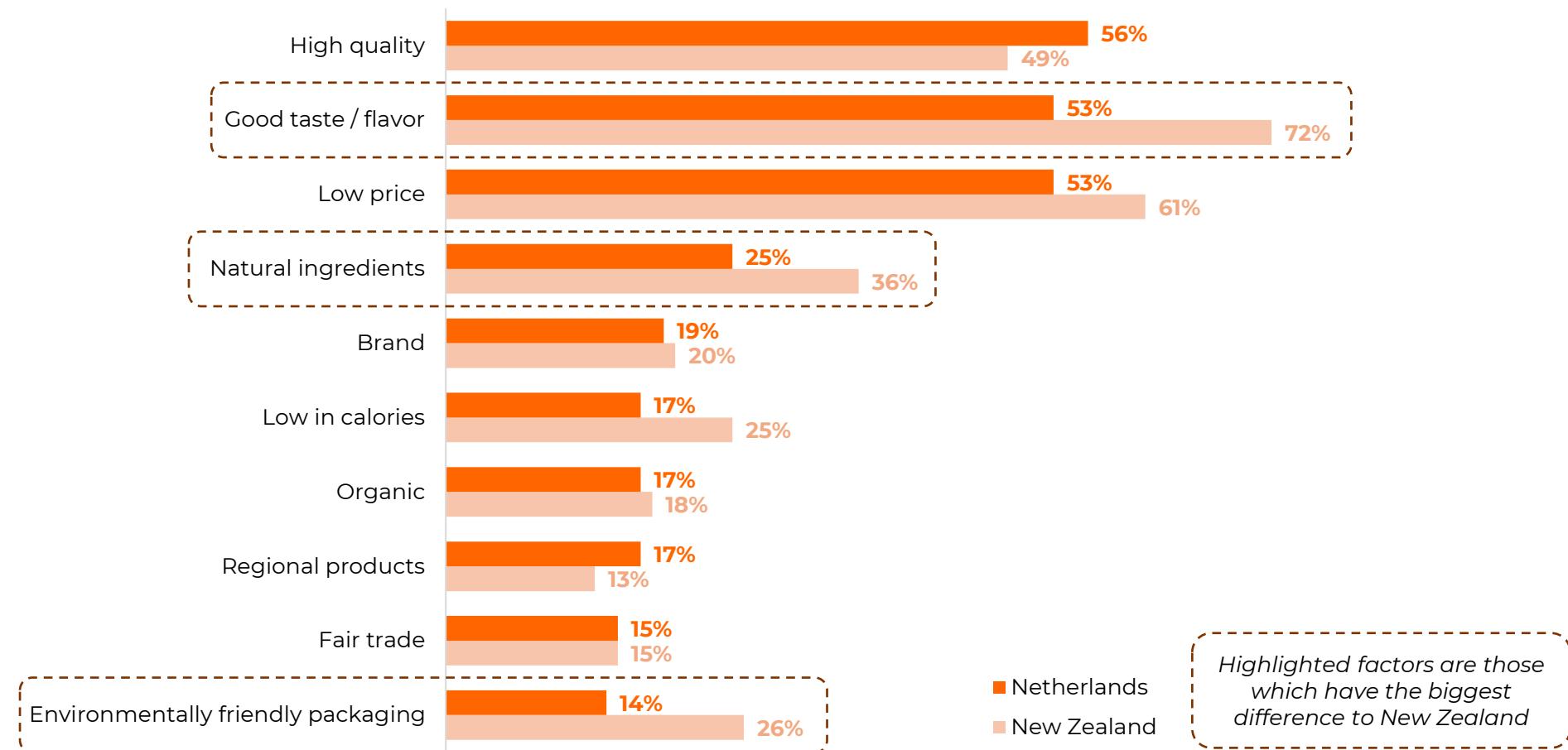
## Key consumer lifestyle, interest and attitude differences between consumers who drink wine frequently and the general population of the Netherlands 2022/23



# Good taste/flavour is a lot less important to consumers in the Netherlands than NZ. Quality supersedes taste in the Netherlands.

## Purchase criteria for food & beverages, the Netherlands vs. New Zealand 2023

'Which are the most important aspects when choosing your food [& beverages]?' (Multi-pick)





*\*In 2022, the Netherlands reportedly produced nearly 10,000 hectolitres of wine; a record high.*

## Expert insight: Consumers in the Netherlands are open to imported wines & New Zealand wine is well-regarded.

- Local production\* of wine in the Netherlands is quite low, albeit growing. The wines that are produced locally are however, very expensive and therefore not incredibly accessible. Thus, consumers are very open to international wines and majority of the market is imported. Local wine production is growing quickly, but imported wines will remain key as the industry is still in its early stages and there remains an issue of land/space for vineyards.
- New Zealand is best known in the Netherlands, alike many countries, for its 'grassy' white wines, namely Sauvignon Blanc. It is viewed as generally high quality. Red wines from New Zealand are also well-regarded amongst industry professionals but may be less known amongst consumers.
- Wine and other products from New Zealand are well regarded by the Dutch, as many people have family ties to New Zealand.
- New Zealand wine, as a whole, should focus on ensuring that they are creating their own niche and differentiating their white wines clearly from French white wines in the eyes of consumers.

## Key takeaways



**Frequent wine consumers lean slightly more towards females, and the age groups 55-64- and 25-34-year-olds. Despite this, consumers of all ages and genders enjoy wine in the Netherlands.**

**Understanding wine drinking demographics is important when making product positioning and distribution decisions entering a new market. Show potential in-market partners that you understand the consumer.**



**Frequent wine consumers in the Netherlands tend to have greater interest in arts, culture and travel, than the general population. They also tend to be more concerned with their appearance and describe themselves as social.**

**These kinds of insights can be used to inform marketing and distribution decisions.**



**Largely due to the Netherlands having such low local wine production (and the product that is produced being inaccessible due to price), consumers are very open to imported wines from around the world.**

**Although old world wine countries have greater awareness, there is awareness of New Zealand as a quality wine producer. However, there is still room to grow, and the opportunity is not solely in white wine.**

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SECTION 3

## THE COMPETITIVE LANDSCAPE

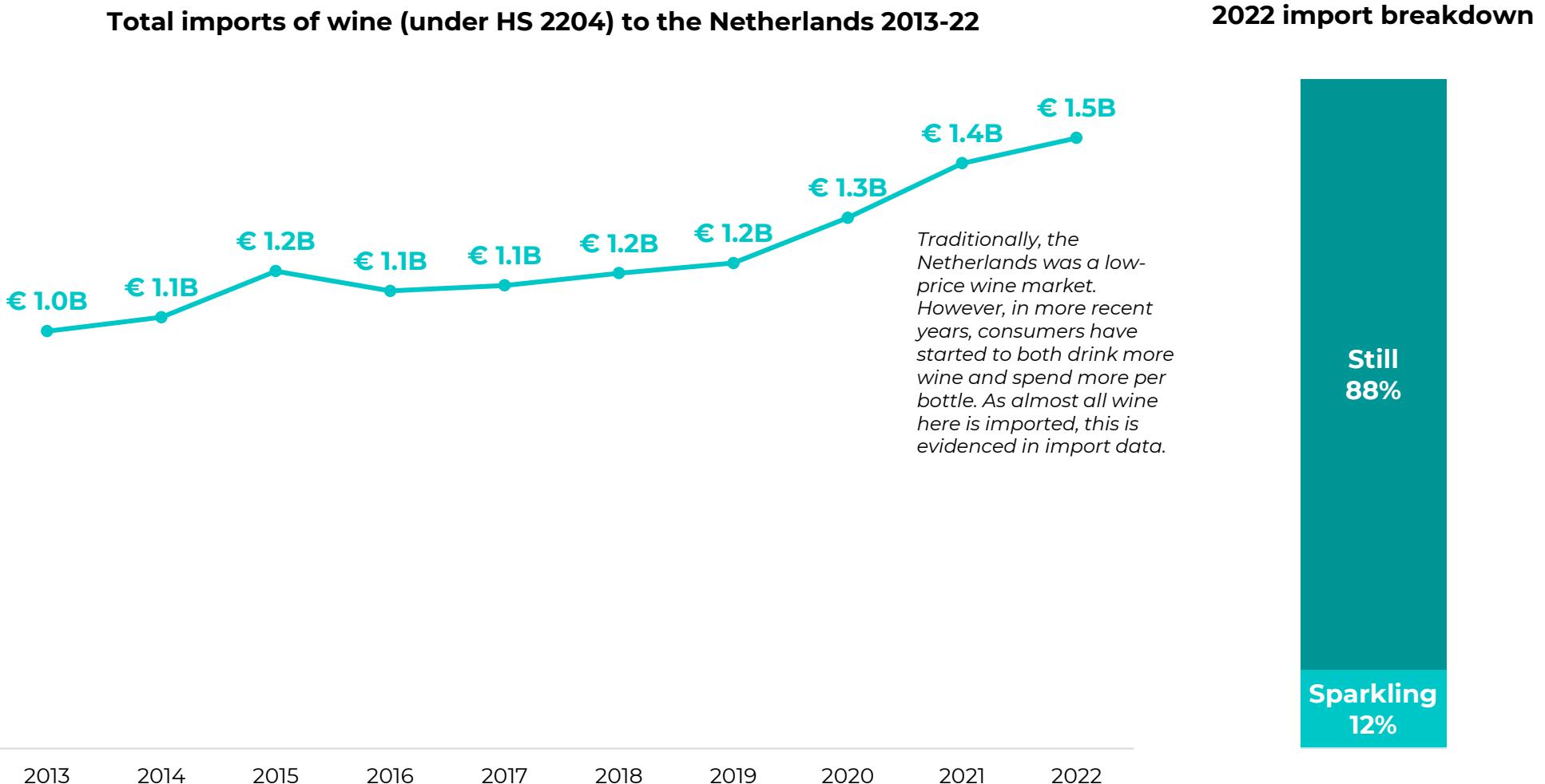


## **A note on the limitations of import & export data.**

The next few slides will look at wine import data to the Netherlands. It is important to note that this does not accurately reflect consumption figures. The Netherlands is a key logistics hub in Europe, meaning that many products pass through this market, yet will be registered as an import here. For this reason, this data should be treated as indicative and further investigation should be taken.



## The Netherlands imported €1.5 billion worth of wine in 2022. However, some of this product may have then been sent to other markets.



**The production origin of these wines may differ from the country that exports them to the Netherlands. For example, many wines imported from Germany are not German.**

**Top supplying markets of wine to the Netherlands 2022**



**#1**  
**France**  
€455M

4% of France's wine exports go to the Netherlands, which makes up 30% of the Netherlands wine imports.



**#2**  
**Italy**  
€455M

3% of Italy's wine exports go to the Netherlands, which makes up 16% of the Netherlands wine imports.



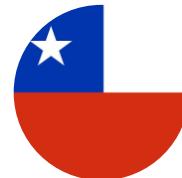
**#3**  
**Germany**  
€219M

21% of Germany's wine exports go to the Netherlands, which makes up 15% of the Netherlands wine imports.



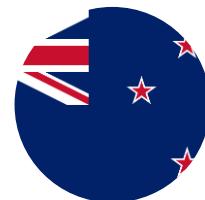
**#4**  
**Spain**  
€151M

5% of Spain's wine exports go to the Netherlands, which makes up 10% of the Netherlands wine imports.



**#5**  
**Chile**  
€95M

5% of Chile's wine exports go to the Netherlands, which makes up 6% of the Netherlands wine imports.



**#13**  
**New Zealand** €19M

1% of New Zealand's wine exports go to the Netherlands, which makes up 1% of the Netherlands wine imports.

**12% of wine companies and brands are private label. This is high compared to New Zealand, where only 1% of brands are private label.**

**Top 10 wine companies in the Netherlands by value market share 2022**

Company name	HQ country	Share
Treasury Wine Estates		<b>12%</b>
Grands Chais de France		<b>7%</b>
LVMH Moët Hennessy Louis Vuitton		<b>3.1%</b>
Pernod Ricard Groupe		<b>2.3%</b>
Arco Bodegas Unidas		<b>2.3%</b>
Bacardi & Co		<b>2%</b>
Accolade Wines		<b>1.9%</b>
Viña Concha y Toro		<b>1.9%</b>
Viña Undurraga		<b>1.8%</b>
Sogrape Group		<b>1.6%</b>
Private label		<b>12%</b>

**Top 10 wine brands in the Netherlands by value market share 2022**

Brand name	Wine origin	Share
Lindeman's (Treasury Wine Estates)		<b>11%</b>
Grand Sud (Grands Chais de France)		<b>6.7%</b>
Berberana (Arco Bodegas Unidas)		<b>2.3%</b>
Undurraga (Viña Undurraga)		<b>1.8%</b>
Martini (Bacardi & Co)		<b>1.7%</b>
Moët & Chandon (LVMH)		<b>1.7%</b>
Concha y Toro (Viña Concha y Toro)		<b>1.6%</b>
Hardys (Accolade Wines)		<b>1.3%</b>
Veuve Clicquot (LVMH)		<b>1.1%</b>
Freixenet (Oetker-Gruppe)	 	<b>1%</b>
Private label		<b>12%</b>



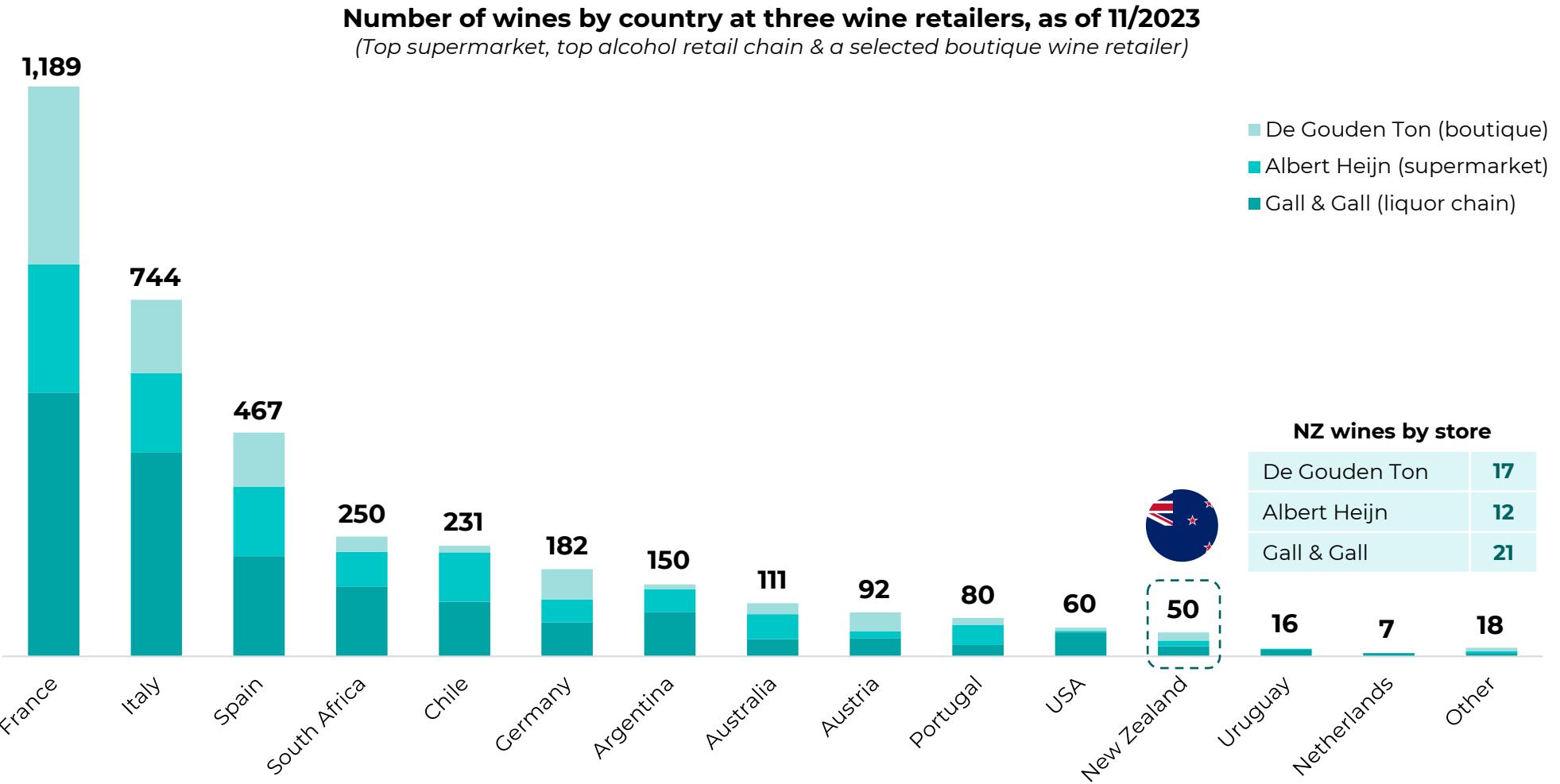
**The next few slides provide a snapshot of wines on shelves in three selected wine retailers.**

Note that this does not depict a complete picture of what wines are available in market.

The retailers selected are:

- **Albert Heijn**, the top supermarket
- **Gall & Gall**, the top liquor store chain
- **De Gouden Ton**, a selected boutique wine retailer

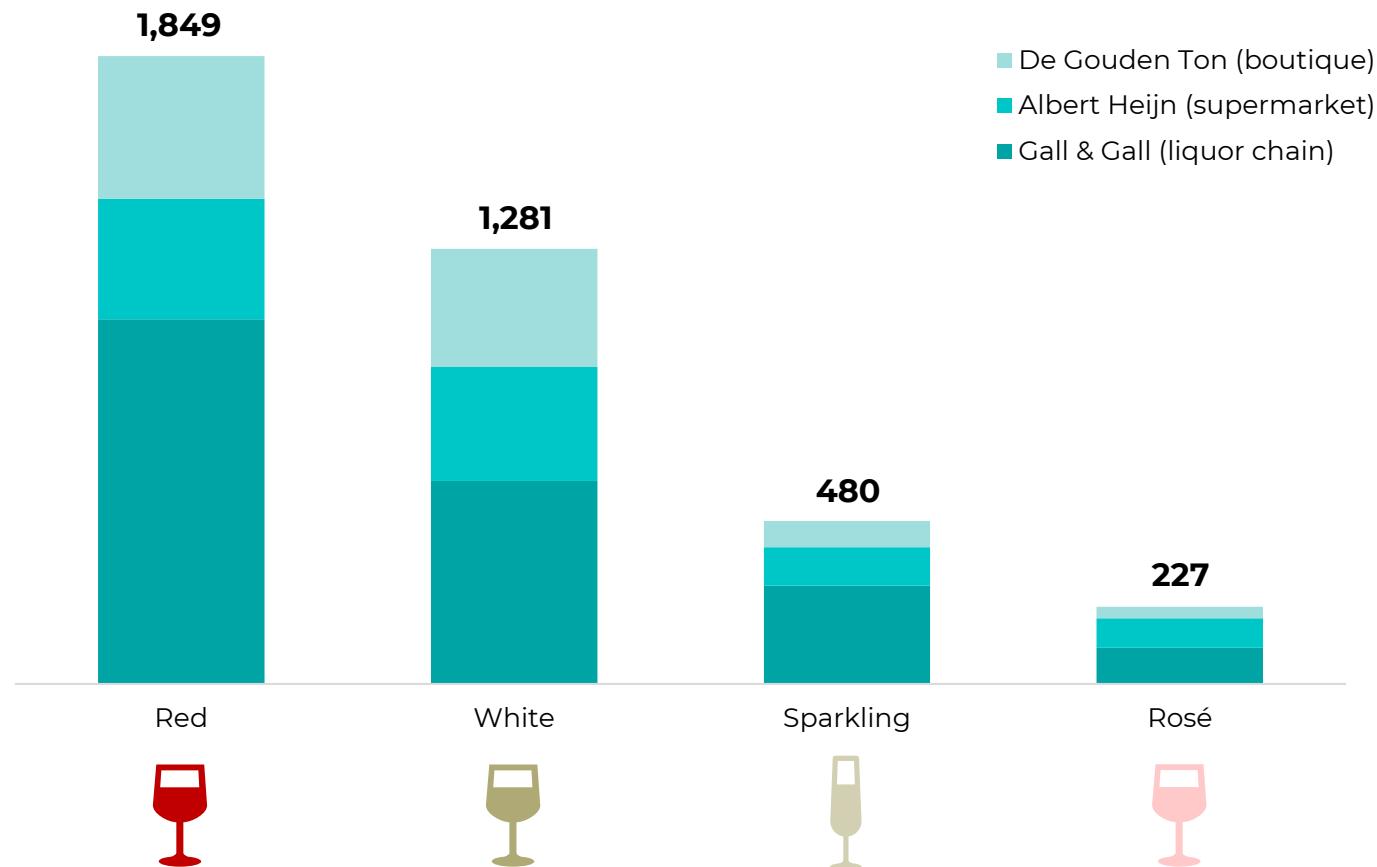
# New Zealand wine does have a presence in the Netherlands; however, this is a small presence compared to old world wine countries.



# Of the three selected top wine retailers, 66% of New Zealand wines are white wines and 30% are red wine.

## Number of wines by type at three wine retailers, as of 11/2023

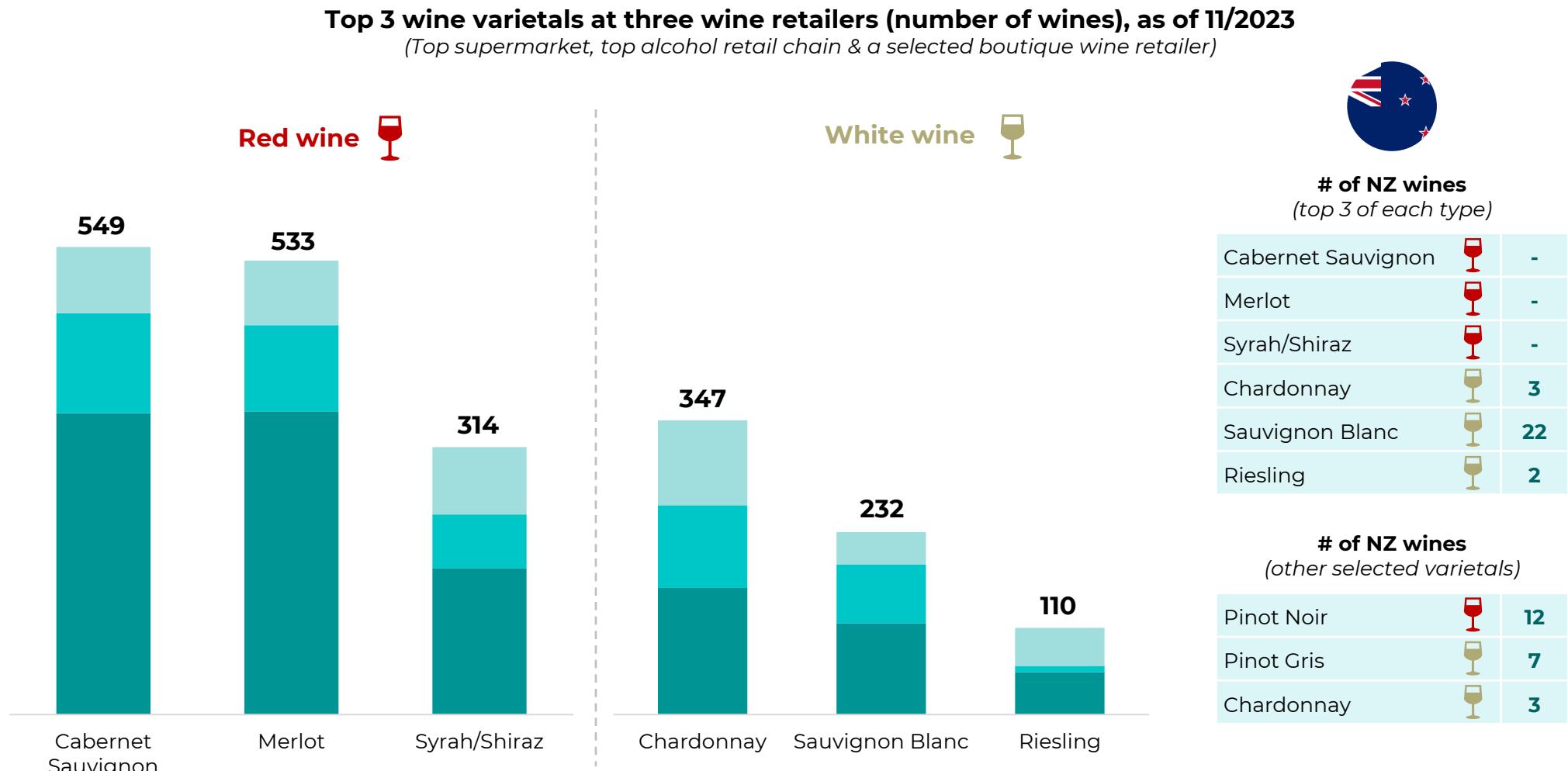
(Top supermarket, top alcohol retail chain & a selected boutique wine retailer)



## NZ wines by type

Red		15
White		33
Sparkling		-
Rosé		2

**Sauvignon Blanc is a commonly stocked varietal. Of the sampled stores, ~10% of Sauvignon Blanc wines stocked were from New Zealand.**



## Key takeaways



**Wine import figures to the Netherlands were at €1.5 billion in 2022. However, this does not necessarily translate to consumption figures, as a lot of wine is shipped here in bulk for bottling and re-exported to other markets.**

**Despite this, we can safely assume that wine imports are high, due to low local production, yet a total market size of €2.7 billion in 2022.**



**A large portion of the wine market in the Netherlands is made up of product from old world wine countries, including France and Italy. However, there is strong presence of wines from the likes of Chile and Australia too.**

**This shows that the market is open to 'new world' wines and that affinity with classic European wines will not be a barrier in the way it can be in other markets.**



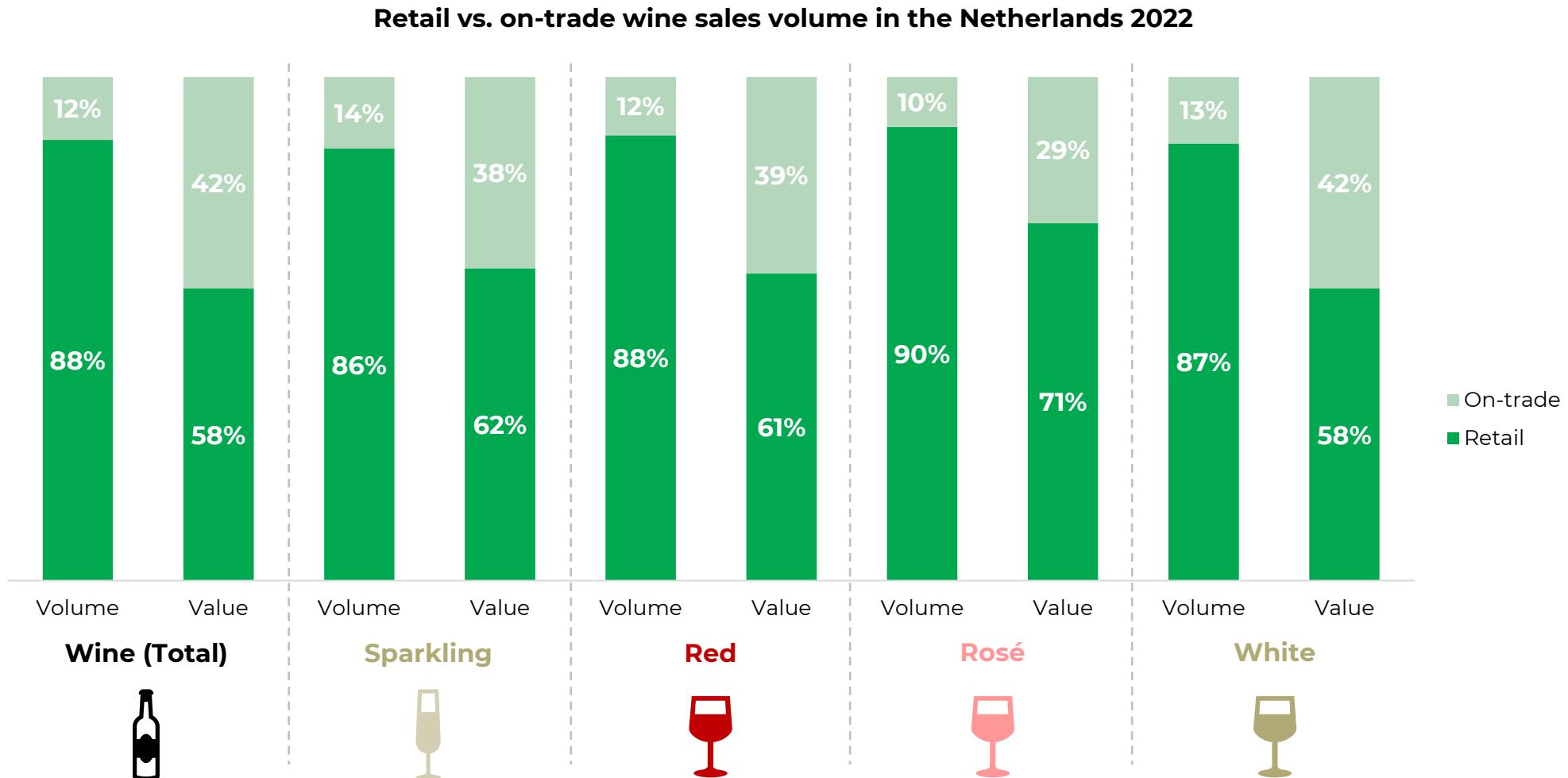
**In an analysis across a selected three key retailers of wine in the Netherlands, there were 50 New Zealand wines recorded. This equates to about 1.4% of wines. Although this is small, it is not so small so to not be noticed. 33 of the wines were white, 15 red and 2 rosé.**

**This shows that buyers in the market will have a level of familiarity with wine from New Zealand.**

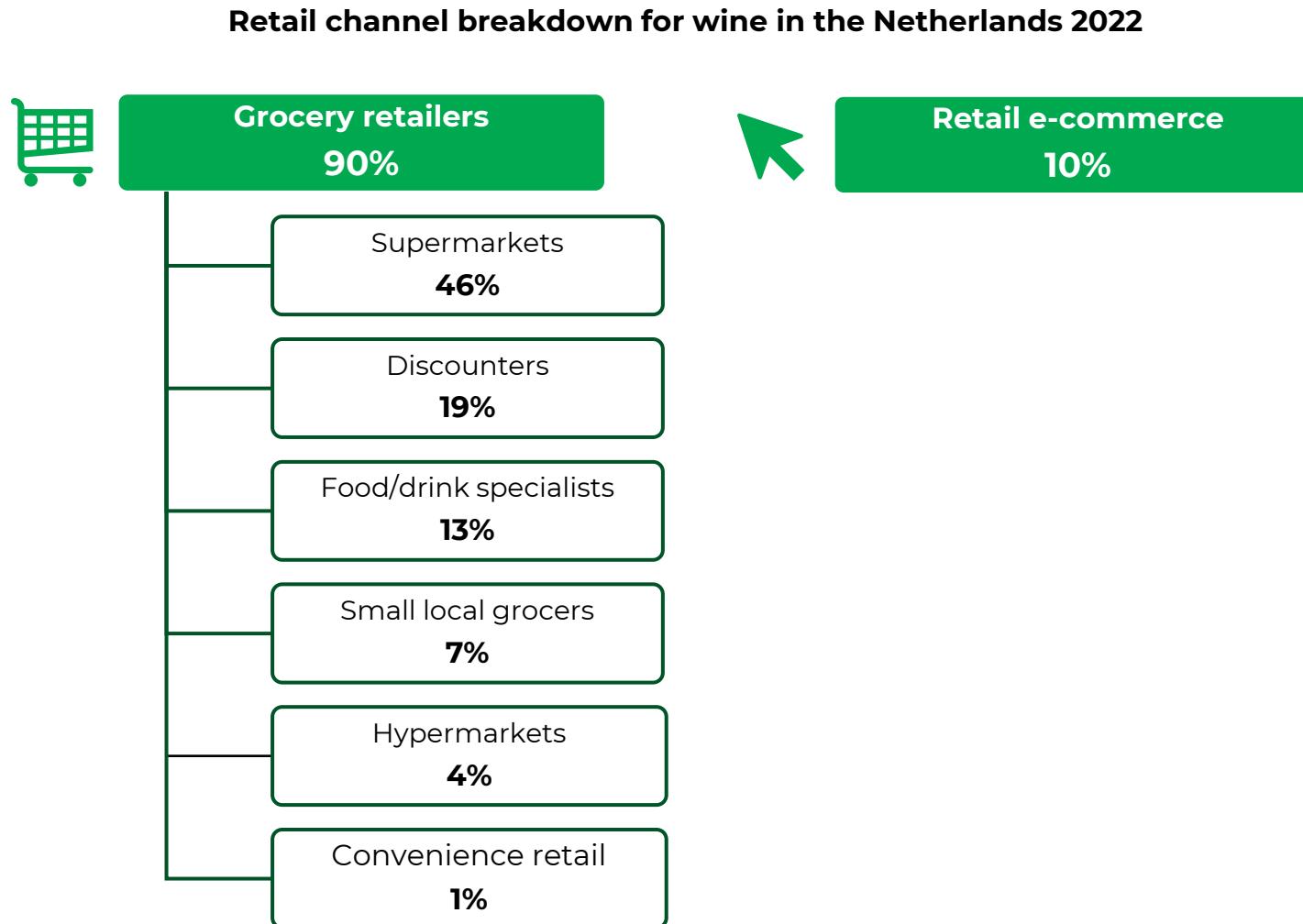
SECTION 4

## DISTRIBUTION CHANNELS: ON-TRADE AND RETAIL

**12% of all wine (by volume) is sold via on-trade channels, such as bars and restaurants. The Netherlands is a classic ‘take-home’ market.**

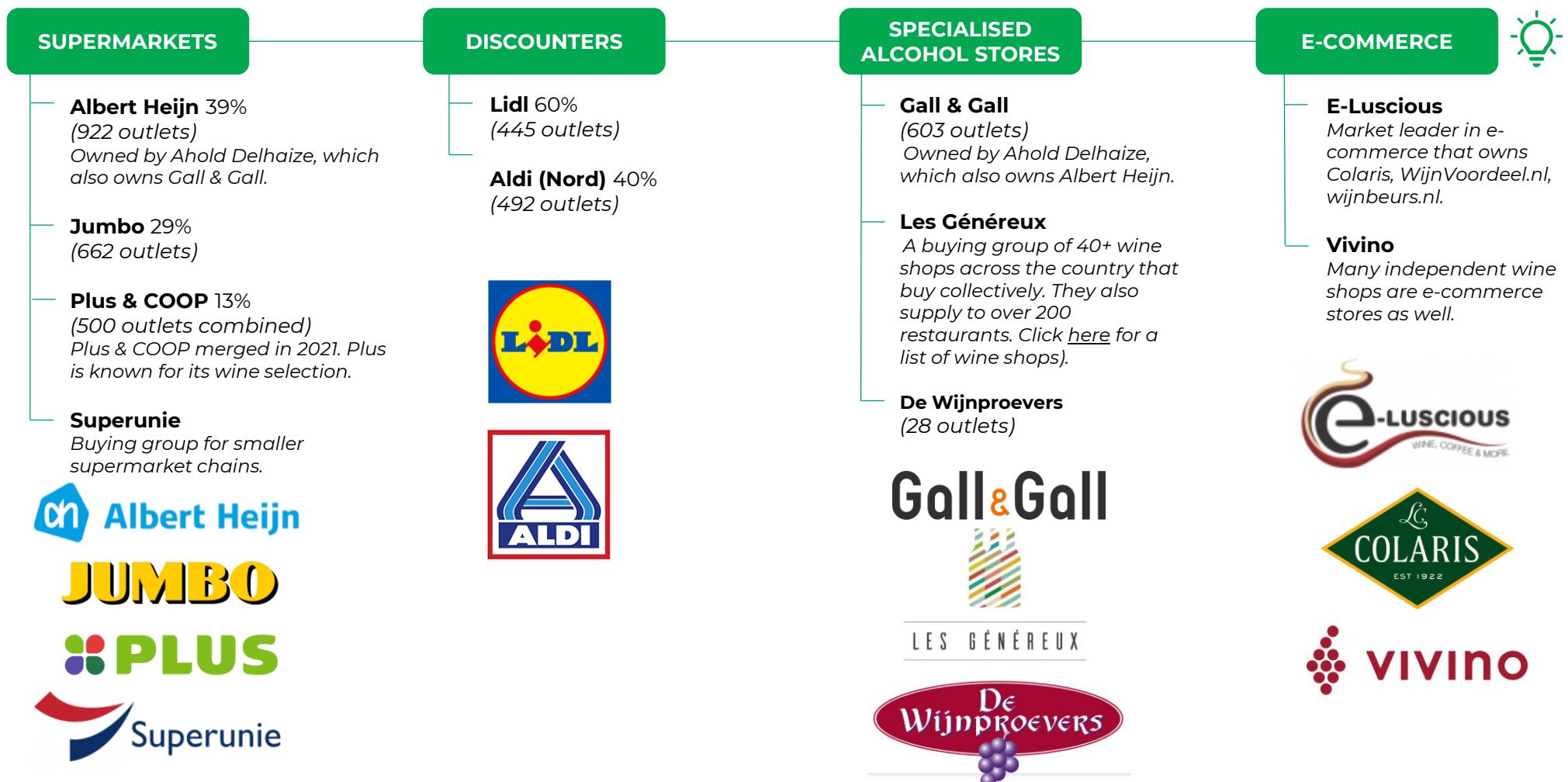


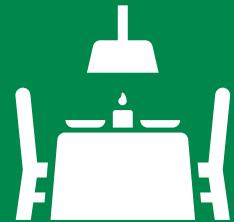
**90% of wine is sold via grocery retailers, leaving just 10% online. If exporters want to sell their wine at scale, grocery retail is important.**



**There are a number of distribution channels to consider for wine in the Netherlands, including traditional supermarkets and discounters, specialised liquor chains, independents and e-commerce.**

**Major retailers (that sell wine) by channel and share of total channel in the Netherlands 2022**



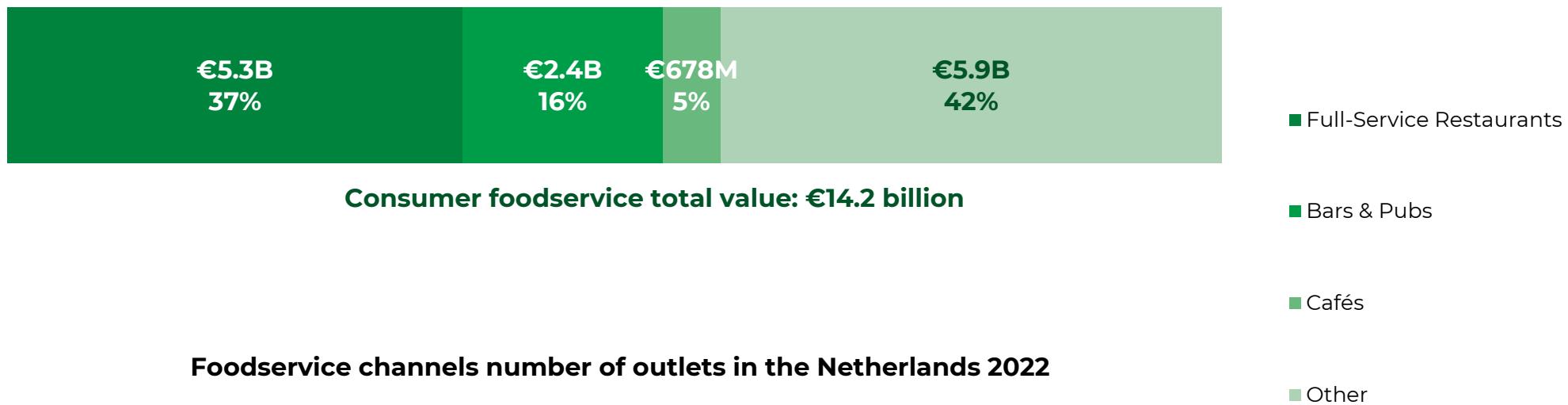


**Although majority of wine, by volume, is sold through retail, on-trade channels also offer significant value and brand positioning potential. The following slides delve into the foodservice sector.**



## Full-service restaurants make up the largest share of total foodservice value. This is an opportunity for premium products.

Foodservice channel size breakdown in the Netherlands by value 2022



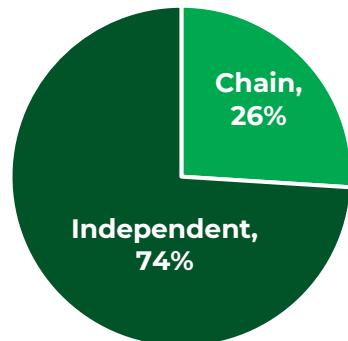
Foodservice channels number of outlets in the Netherlands 2022



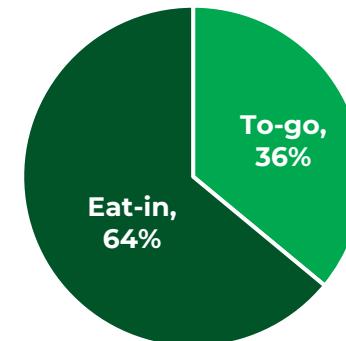
# Independent foodservice establishments make up $\frac{3}{4}$ of the total channel value.

## Consumer foodservice statistics breakdown by sales value in the Netherlands 2022

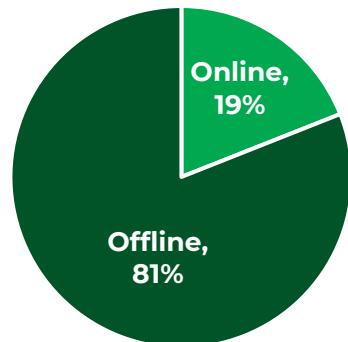
Independent vs. chain



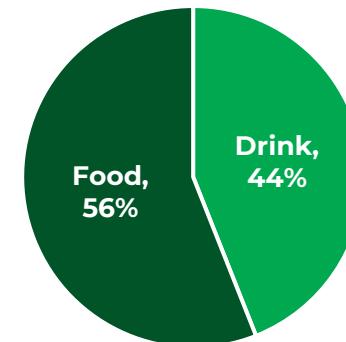
Eat-in vs. to-go



Online vs. offline ordering

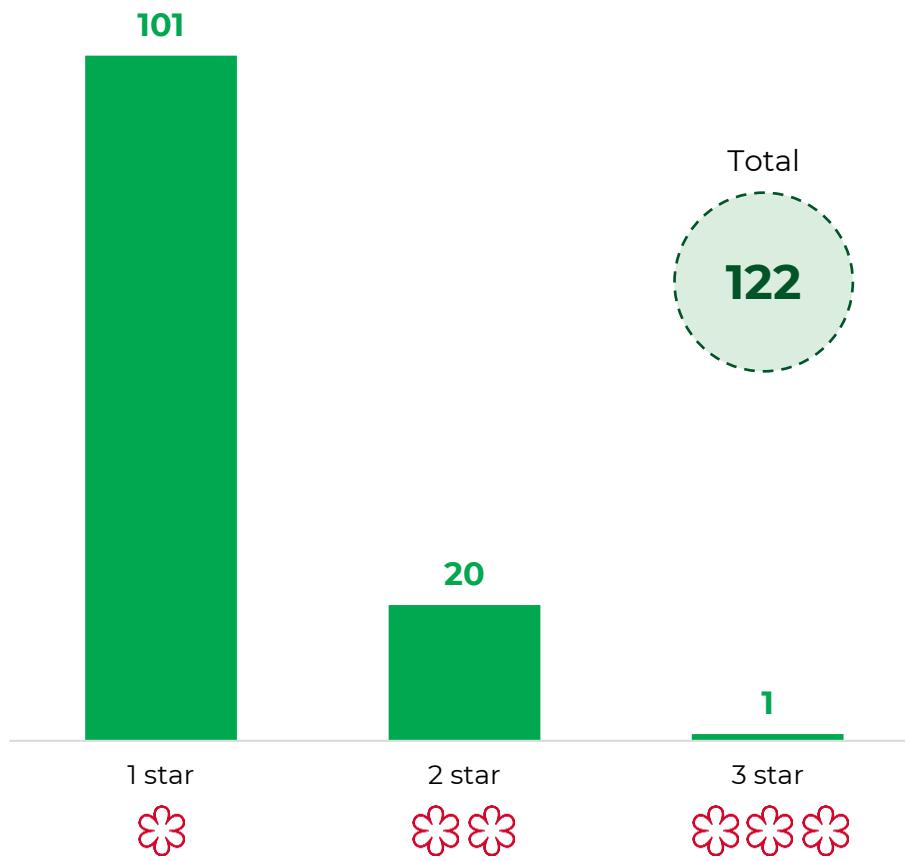


Food vs. drink



# A quarter of Michelin star restaurants in the Netherlands are found in North Holland, 23 of which are in Amsterdam.

**Michelin restaurants in the Netherlands by number of stars 2023**



**Number of Michelin star restaurants in the Netherlands by province 2023**





## Expert insight: Michelin is not the only important source for quality restaurants.

Other sources that are relevant in the Netherlands and globally include:

- [La Liste](#)
- [The World's 50 Best Restaurants sponsored by S.Pellegrino & Acqua Panna](#)
- [Elizabeth on Food \(from Amsterdam\)](#)



## Expert insight: Use a top-down approach & learn from South African wine in the Netherlands.

Koen Opperman recommends that New Zealand wines enter the market at a higher price point and to sell through high-end channels, such as through Michelin star restaurants and boutique wine stores. This will help to create and maintain an image of quality and premium for New Zealand wine.

In this context, it is worthwhile for exporters understand how South African wines approached the Netherlands. Many brands entered the market selling in bulk, at the lowest end of the price scale, on the bottom shelf in supermarkets and wine shops, all of which affects the perception of quality.

It is important for wine brands to realise that their decisions on factors like price and distribution have a flow on impact to the perceptions of all wine from the same country.

- ✓ **Use a 'top-down' strategy**
- ✓ **Find a premium niche**



## Key takeaways



In terms of retail sales channels, the majority of wine is sold through grocery retailers and liquor stores. E-commerce takes up 10% of value sales.

Thus, distribution through bricks and mortar is still dominant, which exporters should be aware of.



Key grocery retail brands include Albert Heijn, Jumbo, Aldi & Lidl. The major liquor store chain is Gall & Gall. Other than this, there are many independent and boutique alcohol/wine stores.

There is a buying partnership of a group of independent wine shops called Les Généreux. It is important for wine brands to align themselves to the right distribution channels and retailers to fit their positioning strategy.



The foodservice channel is worth over €14 billion in the Netherlands. 44% of sales value is attributed to beverages, presenting a significant opportunity.

¾ of restaurants in the Netherlands are independent, meaning that selling into restaurants may require feet on the ground and focus on improving brand awareness and product knowledge.



South African wine has struggled with perceptions of being a cheap wine in the Netherlands, due to bringing in super low-priced wines in supermarkets and alcohol stores.

New Zealand wine can learn from this and use a 'top down' approach, finding a premium niche. Establishments featured on prestigious lists like the Michelin guide and La Liste are a great starting point.

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SECTION 5

## FINDING THE RIGHT ROUTE TO MARKET

# Several of the well-established wine importers in the Netherlands already import some product from New Zealand.

## Top wine importers in the Netherlands



Name	Focus	HQ	Wine import sources	Website
Activin Wine Group	Retail	South Holland	Argentina, Australia, Austria, France, Germany, Hungary, Italy, <b>New Zealand</b> , Portugal, South Africa, USA.	<a href="https://www.activin.nl/">https://www.activin.nl/</a>
De Monnik Dranken	Retail	Overijssel	Spain, France, Italy, Chile, South Africa and more.	<a href="https://monnik-dranken.nl/">https://monnik-dranken.nl/</a>
Noordman Wijnimport	Retail	South Holland	Argentina, Chile, Germany, France, Italy, Austria, Portugal, Spain, South Africa, USA.	<a href="https://www.noordmanwijnimport.nl/">https://www.noordmanwijnimport.nl/</a>
Vin Unique	Retail	North Brabant	Argentina, Australia, Belgium, Bulgaria, Chile, Germany, France, Hungary, Italy, Lebanon, Moldavia, <b>New Zealand</b> , North Macedonia, Austria, Portugal, Spain, South Africa, USA.	<a href="https://www.vinunique.nl/">https://www.vinunique.nl/</a>
Léon Colaris	Retail	Limburg	France, Italy, Spain, Austria, Australia, <b>New Zealand</b> , Portugal, Germany.	<a href="https://www.colaris.nl/">https://www.colaris.nl/</a>
Lekkerflesjewijn.nl	Retail	South Holland	Argentina, Australia, Chile, Germany, France, Italy, <b>New Zealand</b> , Austria, Portugal, Spain, South Africa, USA.	<a href="https://www.lekkerflesjewijn.nl/">https://www.lekkerflesjewijn.nl/</a>
Verbunt Verlinden (also owns Wijnkring wine stores)	Retail	North Brabant	Argentina, Australia, Chile, Germany, France, Hungary, Italy, Netherlands, <b>New Zealand</b> , Austria, Portugal, Spain, USA, South Africa.	<a href="https://www.verbuntverlinden.nl/">https://www.verbuntverlinden.nl/</a>
Résidence Wijnen (also owns De Gouden Ton wine stores)	Retail & on-trade	South Holland	Argentina, Australia, Chile, Germany, France, Italy, Japan, <b>New Zealand</b> , Austria, Portugal, Spain, USA, UK, South Africa, Sweden.	<a href="https://www.residence-wijnen.nl/">https://www.residence-wijnen.nl/</a>
Les Généreux	Retail & on-trade	Gelderland	Australia, Bulgaria, Chile, Germany, France, Greece, Hungary, Italy, Lebanon, <b>New Zealand</b> , Austria, Portugal, Spain, USA, South Africa.	<a href="https://www.lesgenereux.nl/">https://www.lesgenereux.nl/</a>
LFE	Retail & on-trade	Utrecht	Argentina, Australia, Chile, Germany, France, Italy, Moldova, <b>New Zealand</b> , Austria, Portugal, Slovenia, Spain, US, South Africa.	<a href="https://lfe.nl/">https://lfe.nl/</a>

**While some importers cater to both the retail and on-trade segment, others, like New World Wineries have a focus on on-trade specifically.**

**Top wine importers in the Netherlands**



Name	Focus	HQ	Wine import sources	Website
New World Wineries	On-trade	Limburg	Australia, <b>New Zealand</b> , Portugal.	<a href="https://www.newworldwineries.com/">https://www.newworldwineries.com/</a>
De Lange	On-trade	South Holland	France, Portugal, <b>New Zealand</b> , Germany, Chile, Italy, Austria, Spain, South Africa.	<a href="https://www.wijnkooperijdelange.nl/">https://www.wijnkooperijdelange.nl/</a>
Smaragd	On-trade	Utrecht	Germany, Austria, Switzerland, Hungary, Slovenia, Croatia, Italy, France, Portugal, Spain, South Africa, USA, Argentina, Chile	<a href="https://www.smaragdwijnen.nl/">https://www.smaragdwijnen.nl/</a>
Wijnimport J.Bart	On-trade	North Holland	France, Italy, Spain, Portugal, Germany, Austria, Netherlands, Belgium, Hungary, Slovenia, Lebanon, South Africa, Australia, <b>New Zealand</b> , Chile, Argentina, USA, Denmark.	<a href="https://www.wijnimportbart.nl/">https://www.wijnimportbart.nl/</a>
Delta Wines  Owns 9 autonomous subsidiaries, including: • DGS WIJN • Coencoop Wine Traders (Biological and fair-trade wine) • Pallas Wines (Terroir wines) • Global Wine Operations (logistics)	Retail & on-trade	South Holland	DGS - Argentina, Australia, Chile, Germany, France, Hungary, Italy, Moldavia, <b>New Zealand</b> , Austria, Portugal, Slovenia, Spain, South Africa, USA.	<a href="https://www.deltawines.eu/en/">https://www.deltawines.eu/en/</a> <a href="https://www.dgswijn.nl/">https://www.dgswijn.nl/</a>

# Another route to market in the Netherlands is via cash-and-carry wholesalers.

## Top B2B food & beverage wholesalers in the Netherlands



**Sligro, Makro and Hanos** are **cash-and-carry wholesalers** i.e. a physical retail store where you can purchase items in bulk and at a lower price. Typically, this is for foodservice and small retailers. Bidfood competes solely in the foodservice space.



- 51 cash-and-carry outlets, 9 delivery service sites, 3 distribution hubs, 2 production companies.
- Acquired Metro in Belgium in 2022.



- 17 cash-and-carry outlets.
- Makro Europe is owned by Metro Group (German multinational).



- 18 cash-and-carry outlets (+ 2 in Belgium).
- Smaller company but more upmarket.



## **Expert insight: Independently owned wine stores are also important.**

Independent wine stores within communities should not be overlooked. These boutique stores are often owned by very knowledgeable people who supply wine to their local community, including local sommeliers and other people in the industry.

Having someone on the ground in the Netherlands to approach these independently owned stores and getting them to try New Zealand wines and stock them is time-consuming and has a cost. However, it is a great way of building a (premium) presence and building community.

*Example of an independent wine store:  
Cloinq in Groningen. Website link [here](#).*



# Events are an important way for wines to gain awareness in the market. Ensure that products are available in the market already when they are offered for tasting or at events.

## Key events for wine companies in the Netherlands



### Horecava

**Type of event:** Hospitality

**Location:** Amsterdam, Netherlands

**Next event date:** 8<sup>th</sup>-11<sup>th</sup> January 2024

**Website:** <https://www.horecava.nl/>



### Wine Professional

(The specialised on-trade wine trade show, part of Horecava)

**Type of event:** Wine

**Location:** Amsterdam, Netherlands

**Next event date:** 8<sup>th</sup>-10<sup>th</sup> January 2024

**Website:** <https://www.wine-professional.nl/>



### Gastvrij

**Type of event:** Hospitality

**Location:** Rotterdam, Netherlands

**Next event date:** 23<sup>rd</sup>-25<sup>th</sup> September 2024

**Website:** <https://www.gastvrij-rotterdam.nl/en>



### ProWein

**Type of event:** Wine, spirits & other alcohol

**Location:** Düsseldorf, Germany

(It is a big event for the Dutch wine industry too)

**Next event date:** 10<sup>th</sup>-12<sup>th</sup> March 2024

**Website:** <https://www.prowein.com/>

## Insights from Koen Opperman



Wine events and providing opportunities for people in the Netherlands to see and try New Zealand wines is very important. This is relevant for both the wine industry and consumers.

- Organise tastings with industry players, including sommeliers, distributors etc.
- Provide samples at retail outlets and events for consumers. If you don't have someone on the ground, consider hospitality school students with existing wine knowledge.

➤ Tastings for consumers should only be done when the product is already available on shelves.

➤ Tastings for buyers should only be done when products are available in the market.



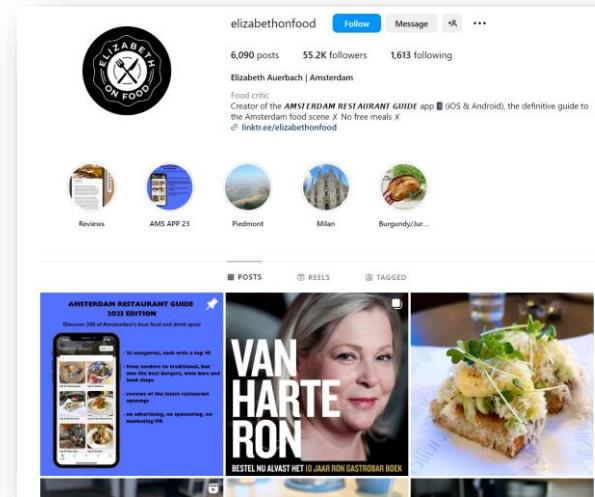
## Expert insight: Find brand ambassadors and create community.

Brand ambassadors in the Netherlands are a great way of increasing awareness of your brand and build community.

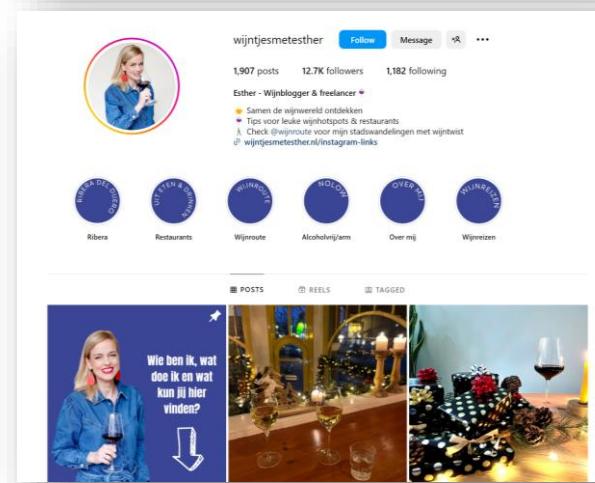
Brand ambassadors could be influencers or people who are in the wine industry, such as sommeliers. However, it is important to select the right ambassadors that reflect your brand image and values.

These ambassadors should be knowledgeable about the brand and product and can promote it in the industry or amongst consumers.

### Influencer examples in the Netherlands



**Elizabeth Auerbach**  
[@elizabethonfood](https://www.instagram.com/elizabethonfood)



**Esther Groenewoud**  
[@wijntjesmetesther](https://www.instagram.com/wijntjesmetesther)



## **Expert insights: When to approach buyers.**

### **For restaurants/on-trade:**

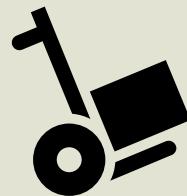
- Restaurants and other on-trade establishments are always looking for new wines to add to their menu.
- Some high-end restaurants update their wine list as often as once per week.
- For this channel, timing is less of a concern.

### **For retailers (grocery and alcohol specialists):**

- Grocery retailers and alcohol retailers like Gall & Gall typically will assess their products once per quarter.
- However, if you have a great brand/product, this could be flexible.

## Key takeaways

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**Getting stocked by a good importer in the Netherlands is important. There are a number of top importers for retail and on-trade. Several do both.**

**Many importers already stock New Zealand wine. On one hand, this is beneficial, as they are already familiar with product from New Zealand. On the other, this means it is even more important to offer something different.**

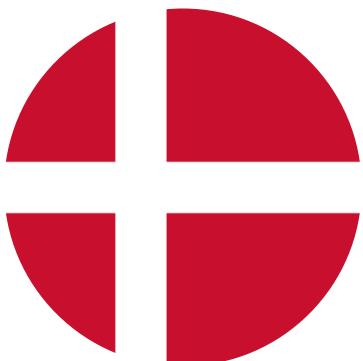


**Small independent retailers should not be discounted. They play an important role in promoting wines and brands to their local communities, including people who work in the industry.**

**Ambassadors for your brand are also important to help build brand awareness and to promote trial. This could be wine shop owners and they could also be wine/food influencers.**

SECTION 6

# FIRST THE NETHERLANDS, WHERE NEXT?



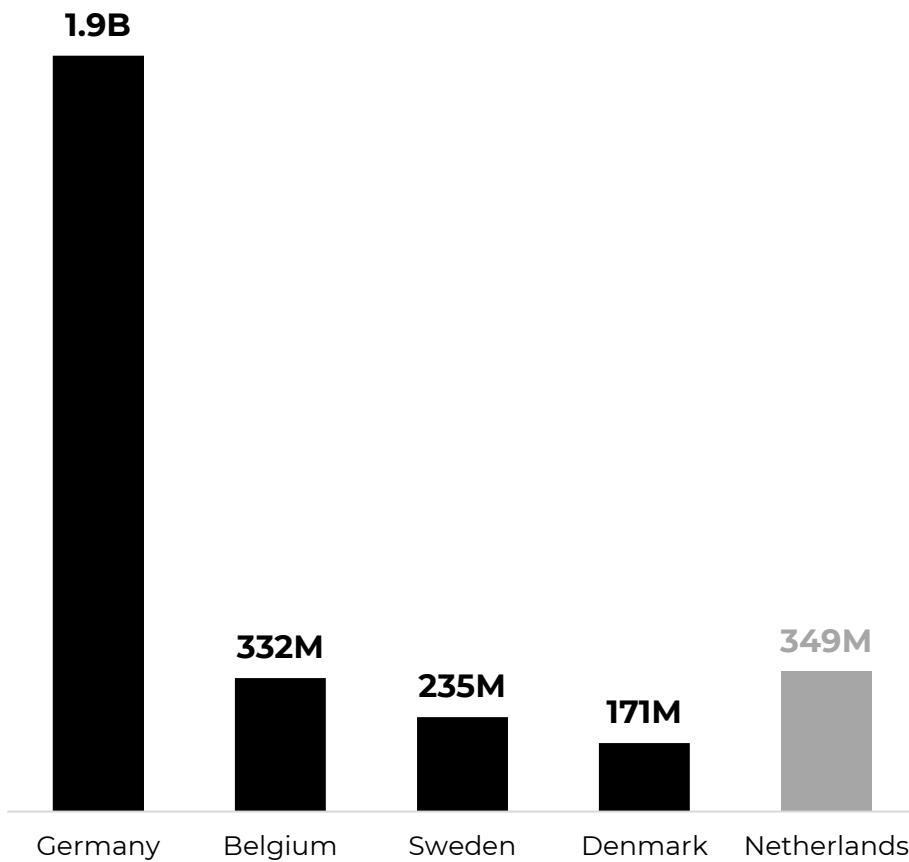
**Wine companies exporting to the Netherlands may want to consider other markets to export. This could be as a next step or in tandem depending on what makes sense for the business.**

In this section we have considered Germany, Belgium, Sweden, and Denmark. This is due to their proximity and similarities to the Netherlands.

**Due to sheer size of the population in Germany, the total volume of wine sold in the country far exceeds the other markets. Per capita, Belgium and Denmark have the highest volume consumption.**

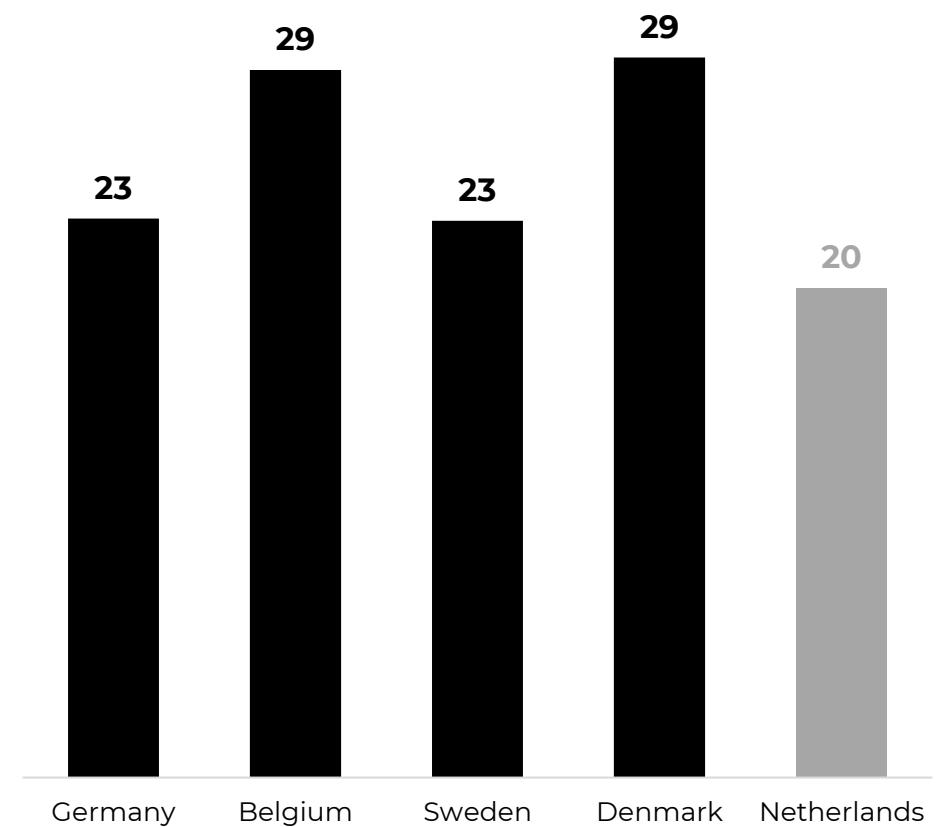
**Sales volume of wine by country in 2022**

*In litres*



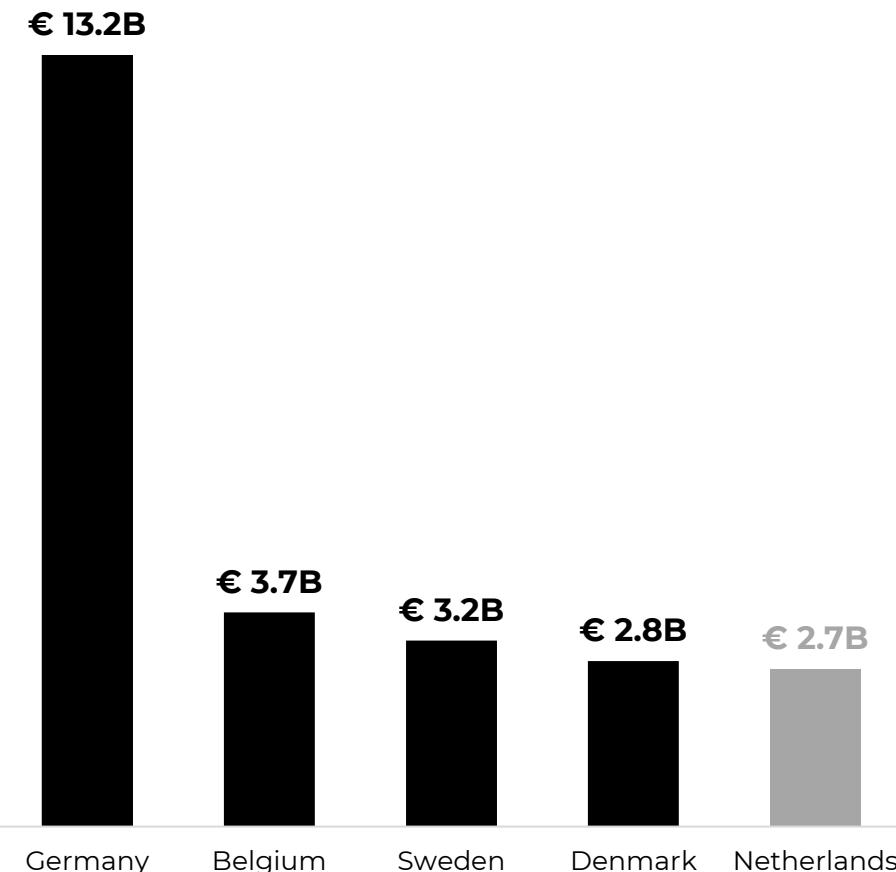
**Volume per capita of wine by country in 2022**

*In litres*

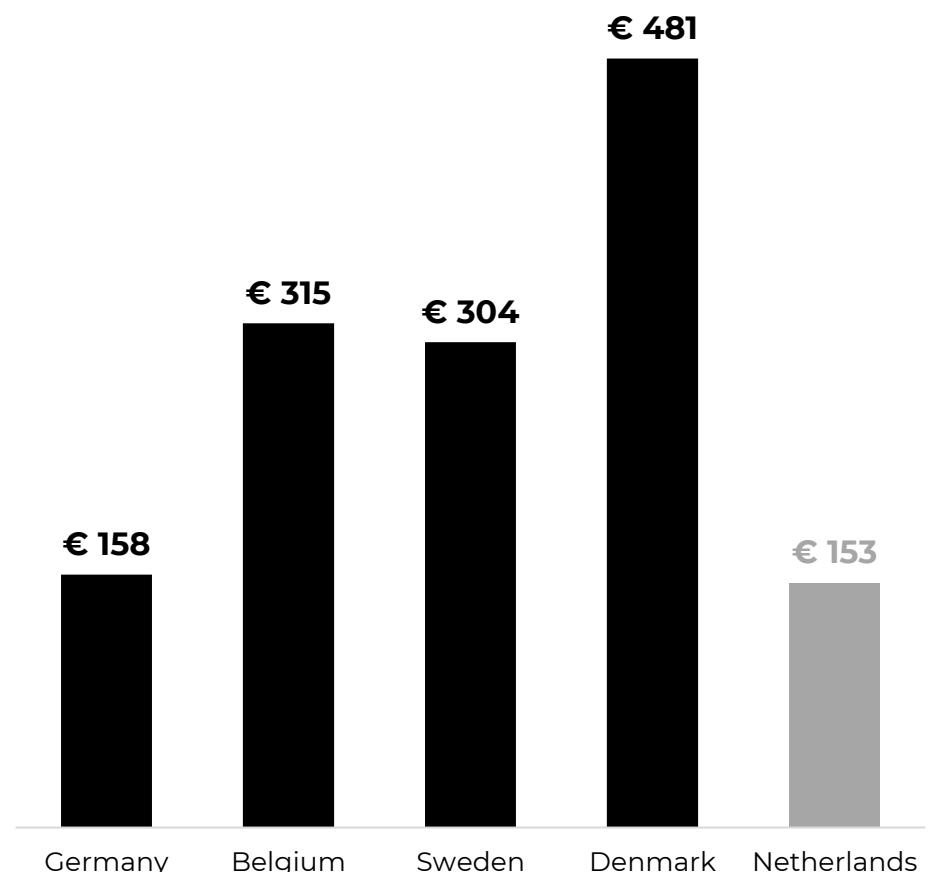


**In value terms, per capita, consumers in Denmark are spending far more on wine than the other markets.**

**Sales value of wine by country in 2022**



**Value per capita of wine by country in 2022**



# Although there are similarities with the Netherlands and Belgium and Scandinavia, there are also key differences. A tailored strategy for each market is required.



## Expert insights on next step markets after the Netherlands



### German's love fresh wine; an opportunity for New Zealand.

Consumers in Germany generally tend to favour fresh wine varietals like Riesling and Pinot Noir. There is not as much Sauvignon Blanc here. Heavier wines, such as oak Chardonnay, would not be purchased from a New Zealand brand, so fresh wines is an opportunity in this market.



### All alcohol retail is sold via a government-owned chain in Sweden.

Selling alcohol in Sweden is a different dynamic, as there is only one place to buy alcohol (above 3.5% ABV) through retail. This is a government-owned chain called Systembolaget. The hours of selling alcohol is strictly controlled through this, as well as a number of other regulations, i.e. discounts are banned. This also means that alcohol is also extremely expensive in Sweden.



### Consumer wine tastes and trends in Scandinavia is similar to the Netherlands.

In terms of consumers, Scandinavian countries have similar tastes and trends. This is the case in wine tastes and food/drinking culture. For example, Copenhagen has a very similar culinary culture to Amsterdam, with modern wine bars and trendy restaurants. Scandinavia has been argued to have one of the best restaurant scenes in the world. On-trade could be an opportunity in Scandinavia.



### The Netherlands has a lot of crossover with Belgium with key distribution players.

Although alcohol distribution is relatively fragmented in Belgium and the Netherlands, there has been increased consolidation of smaller players in both markets by large multinationals. This has led to crossover between the two markets. An obvious example of this is Ahold-Delhaize (Albert Heijn), which owns subsidiaries in both countries. This could mean entering both markets is made easier in terms of distribution.



### The restaurant culture in Belgium is quite different.

In Belgium, the culinary culture in this space is similar to France. The Netherlands dining etiquette is generally more relaxed and informal, and restaurants are often modern/contemporary. In Belgium, dining is considered more of an occasion, and there is a greater emphasis on formality. These differences demonstrate a broader cultural difference that needs to be accounted for when exporters make decisions around pricing, positioning and distribution channels.

## Key takeaways



**From a value and volume perspective, Germany offers a much larger potential market. With a much larger population and bigger market comes added complexities, such as high competition as well.**

**However, consumers in Germany tend to enjoy fresh tasting wine, which could lend to an affinity with New Zealand wine.**



**In terms of value per capita, Denmark has a significantly higher spend on wine. Sweden is also higher than the Netherlands.**

**Scandinavia has a foodservice and culinary scene that has similarities with the Netherlands', in that it is a modern, informal culture. In this way, the approach to the markets could work together well.**

**It is important to note that retail is different in Sweden. All alcohol is sold via a government-owned chain and there are strict regulations. Alcohol is also very expensive through this.**



**Belgium's value per capita spend and total wine market is higher than the Netherlands.**

**There are also key crossovers in distribution players in each of the markets, which could mean it would make sense to work in both markets.**

**However, the foodservice and culinary culture in Belgium is significantly different to the Netherlands. Belgium is much more traditional, with greater similarities to France. The approach may need to be tailored here.**



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