



Passport

ALCOHOLIC DRINKS IN BELGIUM

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ALCOHOLIC DRINKS IN BELGIUM - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Total Volume Sales Continue To Fall

After a sharp decline in total volume sales in 2016 as a result of an increase in excise duty, alcoholic drinks continued to struggle in 2017. The market's further decline can be attributed to three main factors. Firstly, the number of Belgians crossing the border to buy alcoholic drinks appears to be increasing, with on-trade players, which are buying directly or via foreign bulk alcoholic drinks resellers, having the greatest impact on overall volume sales. Secondly, the market is witnessing a premiumisation trend whereby Belgians have become increasingly selective, buying fewer but better quality alcoholic drinks, at least in their own minds. Finally, Belgian consumers are also looking to adopt more responsible alcoholic drinks consumption habits for health reasons.

Lower and More Responsible Alcohol Consumption

The main trend impacting alcoholic drinks in 2017 was a consumer desire to reduce one's alcohol consumption. In February 2017, the Belgian Foundation against Cancer launched its "Tournée Minérale" campaign. The goal of the campaign was to encourage consumers to avoid alcohol for one month. The campaign was successful, especially in the on-trade, as Belgians tried to embrace more responsible alcohol consumption, realising that they could still enjoy their free time when consuming less or no alcohol. In this climate, lower ABV drinks or even alcohol-free variants performed well, with a good example being seen in the beer category. The leading player, Anheuser-Busch InBev, relaunched Jupiler 0% in 2017, with the product supported by significant marketing activities, with some even aimed at Belgian ProLeague football fans. As a result, in 2017, non alcoholic beer registered significant growth. Surprisingly, Duvel Mortgatt, the NBO of Vedett, a domestic premium lager brand, sought to capitalise on "Tournée Minérale" by launching Vedett Water.

Overall, while replacing alcoholic drinks with their alcohol-free versions remained a minor trend, it was more common to see consumers choosing lower ABV drinks. For that reason, categories such as flavoured/mixed lager and cider/perry registered positive performances.

Large Manufacturers Are Suffering the Most

The decline in total volume sales naturally affected the largest alcoholic drinks manufacturers the most, with this exacerbated by the strategy that some of these large players have adopted. Indeed, as sales are declining and the Belgian subsidiaries of these multinationals have targets, they are tending to focus on promotional activities in order to limit volume losses. In doing this, they have reduced or even ceased advertising. On the contrary, smaller manufacturers, which have also been hit by the volume decline, but to a lesser extent as they tend to be more specialised and have more loyal consumers, are not running heavy promotions and have maintained their advertising budgets. For example, Bruggeman increased its marketing budget in 2017 and gained share in various categories. It was also noticed that Belgian brands performed well in categories such as wine, gin, liqueurs and craft beer. Nevertheless, large manufacturers continued to lead the categories in which they were present, for example

Anheuser-Busch InBev in beer, Diageo in spirits and Bacardi Martini in RTDs/high-strength premixes. Retailers remained by far the leading players in wine, especially still wine.

Both the Off- and On-trade Channels Continue To Struggle

The on-trade channel in Belgium has not performed well for many years. Other than price increases and a reduction in the consumption of alcoholic drinks, the on-trade channel also suffers from relatively low standards. Indeed, as going out becomes more expensive and less frequent, Belgians are expecting both good service and facilities. Therefore, alcoholic drinks manufacturers need to help on-trade outlets improve. Some are already doing this by investing in nice bars and pubs in busy cities such as Brussels and Antwerp but more will need to be done if the channel is to stand any hope of a recovery over the forecast period. Events and activities such as pop-up stores are becoming increasingly important for alcoholic drinks brands in Belgium. Indeed, many manufacturers significantly increase their promotional activities during festivals held over the summer.

The off-trade channel also continued to struggle in 2017. Since the emergence of a premiumisation trend in Belgium a few years ago, alcoholic drinks manufacturers have been launching more brands or new versions of their existing brands. This has led to very crowded retail shelves, especially in beer. Manufacturers and retailers are thus starting to work together to improve the visibility of the various types of alcoholic drinks, but, again, more will need to be done in this area over the forecast period.

Further Pressure on Total Volume Sales Over the Forecast Period

Total volume sales of alcoholic drinks are expected to continue to fall in Belgium over the forecast period, largely due to the factors mentioned above, namely the rise in excise tax, cross-border trade, more responsible alcohol consumption, the rise of alcohol-free variants and the premiumisation trend. However, the latter two factors represent an opportunity for manufacturers, some of which could follow in the footsteps of Anheuser-Busch InBev, which is investing heavily in non alcoholic beer. In addition, premiumisation is the easiest way for manufacturers to create value in a declining market where consumers are likely to pay more to consume a drink which they perceive as higher in quality.

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

- The legal age for purchasing alcohol in Belgium is 18 for spirits and 16 for wine and beer. This stems from a law which came into force in 1977, stating that it is illegal to serve any kind of alcohol to under 16-year-olds in cafés, hotels and restaurants. Moreover, the legislation makes it an offence for bartenders to serve alcohol to minors, or customers who are obviously drunk. Under the law, bartenders can be held personally accountable for any damage caused by customers who are drunk on the premises. In the off-trade channel, the relevant legislation, which came into force in 1983, states that it is illegal to sell or offer for free distilled drinks to consumers under 18 in retail outlets or via vending machines. Thus, any person who sells alcohol in either the on- or off-trade channel must ask for identification if there is any doubt as to the buyer's age.
- According to a study published by the consumer watchdog OIVO (Onderzoeks- en Informatiecentrum van de Verbruikersorganisaties), the average age at which Belgians drink

alcohol for the first time is 11 years and five months. A study published in 2010 reported that 25% of 10-year-olds and 88% of 17-year-olds had tried alcohol. Moreover, half of respondents had already drunk beer or wine. The consumption of alcohol is widely accepted or tolerated in Belgium. In 86% of cases, parents were aware that their child had drunk alcohol. Around 70% of respondents declared that their parents accepted or would accept them drinking alcohol.

Drink driving

- Since December 1994, Belgian driving legislation has stated that 0.5g of alcohol per litre of blood is the legal limit for drivers. Thus, driving any vehicle exceeding that limit is a criminal offence, subject to a fine of between EUR137.50-11,000, depending on the quantity of alcohol found in the offender's bloodstream and whether they are a repeat offender. The option of revoking the offender's right to hold a driving licence is also available to the authorities.
- The Belgian government has considered a reduction in the permissible blood alcohol level. However, the Belgian Institute of Road Safety has stated that the current limit is sufficient and has been instrumental in reducing the numbers of accidents and deaths on Belgium's roads. As such, proposals to reduce the limit have been rejected.
- In 1999, the Belgian government launched a national campaign called "BOB". The initiative was still running in 2016. "BOB" is a person voluntarily chosen among a group of people going out. This person must not drink alcohol or consume more than the legal limit (the equivalent of one beer per evening) and drive everyone home at the end of the evening. The campaign recorded its biggest success in the winter of 2015, when only 2.5% of drivers tested were above the legal alcohol blood limit. The verb "bobber" has now entered the Belgian vocabulary following the success of "BOB".
- In June 2015, the legal blood alcohol limit for drivers holding a licence for less than three years was lowered to 0.2g of alcohol per litre of blood.

Advertising

- Seven pieces of legislation regulate the advertising of alcoholic drinks in Belgium. However, the Consumer Law of 1977 regulates the advertising and marketing of alcoholic drinks.
- The regulation of advertising on television and radio is a matter of community competence, which means that the communities which comprise Belgium and the Brussels capital district have their own different rulings, albeit very similar. There are five different laws or decrees which regulate radio and television programmes, and all of these contain a chapter relating specifically to the advertising of alcoholic drinks.
- The Jury for Ethical Practices in Matters of Advertising (JEP) is the auto-disciplinary organ of the Belgian advertising industry. It was established in 1974 by the Council for Advertising as a not-for-profit organisation and includes representatives of organisations of advertisers, advertising agencies and media outlets, with the goal of promoting advertising as a means of economic and social expansion.
- Only responsible and healthy advertising is deemed worthy of the public's trust. It is the task of the jury to investigate whether advertising messages that are disseminated via the media are in line with the accepted rules on advertising ethics. The auto-disciplinary workings of the JEP assume the voluntary cooperation of advertisers, advertising agencies and media outlets.
- In addition, auto-disciplinary rules for publicising and marketing beer were developed by the Union of Belgian Brewers. These rules were formally adopted in 1992 and described in the Code of Conduct of the Arnoldus Group. They were subsequently applied to other alcoholic drinks categories.
- This system was replaced in 2005 by the Covenant on the Practice and Advertising of Alcoholic Beverages, which is supported by the Belgian government and all relevant

professional organisations operating in the alcoholic drinks industry in Belgium. The Covenant represents an efficient system of self-regulation for the alcoholic drinks industry; it also provides a system of sanctions for breaches of the Covenant. These are designed to protect consumers, especially younger ones, from excessive or misleading advertising. The Code of Conduct and regulation has received a formal legal basis, with the rules contained within the Consumer Law of 24 January 1977, as supplements, under article 7bis.

- Belgian law states that the advertising of alcoholic drinks must not specifically target minors or facilities such as social and healthcare institutions. It requires that alcohol advertising does not encourage the illegal or irresponsible consumption of alcohol or exaggerate the benefits of drinking alcohol, such as giving the impression that the consumption of a certain product may improve mental or physical performance. There are specific codes of conduct for marketing alcohol to minors that effectively prohibit the advertising of alcohol to persons below the legal drinking age.
- Specific rules are included on the placement of advertisements in various media channels, including the avoidance of advertising to minors. Moreover, all alcoholic drinks advertising must prominently feature an educational message. In the case of beer, the exact wording is “Une bière brassée avec savoir, se déguste avec sagesse” in French, or “Bier met liefde gebrouwen, drink je met verstand” in Dutch. These phrases essentially mean “consume with care”.
- In 2013, alcoholic drinks players, trade associations and legislators signed a convention on the advertising and selling practices for alcoholic drinks in Belgium. This convention states that each party assumes responsibility and will take action to combat alcohol abuse.

Smoking ban

- In 2006, the government introduced a smoking ban in public areas in Belgium, including workplaces, hospitals, train stations, airports and commercial spaces. In 2007, the ban was extended to consumer foodservice outlets where food is served. Instead of banning smoking in order to focus on food, the majority of cafés/bars chose to circumvent the regulations by ceasing to serve food, becoming smoking bars/pubs. However, the ban encompassed all on-trade outlets in the summer of 2011, including all bars and nightclubs. In 2012, Belgium’s smoking ban was also extended to include the outside terraces of on-trade establishments.

Opening hours

- On-trade: Cafés/bars in Belgium can serve alcohol 24 hours a day, seven days a week, although few establishments remain open all day owing to the difficulty finding staff willing to work at certain times. In some localities, by-laws require bars to close at 03.00hrs or pay special taxes to remain open between 01.00-03.00hrs. Such by-laws are more common in Belgium’s Flemish-speaking regions than in Wallonia or Brussels.
- Off-trade: On Fridays and the day before a public holiday, retailers can open from 05.00-21.00hrs (if the public holiday is on a Monday, the day before is considered to be the Saturday). On all other days permitted opening hours are 05.00-20.00hrs.
- Although Sunday used to be a day off for off-trade outlets in Belgium, more and more convenience stores and independent retail outlets are opening on Sunday mornings.
- Night shops: Outlets with less than 150 sq m of selling space, offering mainly food and household products and clearly displaying the designation “night shop”, are allowed to open between 18.00-07.00hrs.
- Phone shops: Subject to the same opening hours as general retail outlets, including the measures regarding Fridays and the days before a public holiday.

- This law does not apply to horeca, drinking establishments, cinemas, fitness centres, sports centres or campsites.
- The law also states that all outlets must have at least one closing day per week. However, there are some exceptions, such as for tobacco specialists and forecourt retailers.

On-trade establishments

- The review period was difficult for the on-trade channel in Belgium, with a decline recorded in the number of establishments. There were three main reasons for this. Firstly, horeca in Belgium was one of the least regulated industries. It is not uncommon to see workers without an employment contract or purchases being paid for without an official bill or receipt. To end these practices, new requirements were introduced which have led to additional administrative tasks and costs for horeca operators, but also deprived them of some of the leeway they need to survive. As a result, many horeca establishments, mostly small ones, have closed. For example, over 2,000 bars/pubs closed over the review period. Another requirement is a “Black Box”, which records all inputs and outputs. The “Black Box” became compulsory for all horeca establishments from 1 January 2016. Some observers believe that the “Black Box” will “kill” horeca in Belgium.
- Secondly, the drinking of mid-priced lager is no longer a national pastime. Indeed, the saying “drink less but better” has become a reality, and instead of drinking several mid-priced lagers in a café, more and more Belgians are choosing to drink one or two speciality beers at home. The higher ABV of speciality beer means that drinking at home is a safer option. Moreover, a study has also shown that while Belgians used to prefer cafés for socialising, they are increasingly opting for the comfort of their own home for drinking beer and relaxing. As mid-priced lager used to be the main attraction of cafés/pubs, many of these outlets have lost their main source of income.
- Premiumisation is another factor behind the decline in number of on-trade establishments in Belgium. With less free time, Belgians want to enjoy themselves when they go out. Thus, many are choosing high-end and trendy bars over small local cafés.
- The conclusion is that there has been a clear shift from the on-trade to the off-trade. One of the major trends affecting alcoholic drinks, cocktails, explains this shift very well. With encouragement from alcoholic drinks manufacturers, consumers moved to making and savouring cocktails at home instead of going out to a bar.
- Nonetheless, a new type of on-trade channel is emerging. The so-called “third channel” comprises high-end bars with a concept or the hosting of themed events and pop-ups.

Table 1 Number of On-trade Establishments by Type 2012-2017

'000 outlets	2012	2013	2014	2015	2016	2017
Consumer Foodservice by Type	46.0	44.4	43.7	43.3	42.4	41.9
100% Home Delivery/ Takeaway	2.4	2.4	2.4	2.3	2.3	2.3
Cafés/Bars	10.5	9.1	8.6	8.4	8.1	8.0
Full-Service Restaurants	26.9	26.8	26.7	26.6	26.2	25.9
Fast Food	5.0	4.9	4.8	4.8	4.7	4.7
Self-Service Cafeterias	0.1	0.1	0.1	0.1	0.1	0.1

Source: Euromonitor International

TAXATION AND DUTY LEVIES

Table 2 Taxation and Duty Levies on Alcoholic Drinks 2017

Excise tax	Value	Volume/Value Unit
Beer	EUR2.0	per hectolitre
Still Wine	EUR74.9	per hectolitre
Sparkling Wine	EUR256.3	per hectolitre
Spirits	EUR2,992.8	per hectolitre
RTDs/High-Strength Premixes	EUR2,992.8	per hectolitre
Cider/Perry	EUR256.3	per hectolitre

Source: Euromonitor International

OPERATING ENVIRONMENT

Contraband/parallel Trade

According to trade sources, contraband/parallel trade in alcoholic drinks is significant in the on-trade channel in Belgium. Nevertheless, this trade should decline with the implementation of the “Black Box” in on-trade outlets. However, while recognising its existence, it is difficult to quantify the impact of illegal and clandestine distribution on the overall alcoholic drinks industry in Belgium.

Duty Free

Duty free sales of alcoholic drinks in Belgium increased over the review period. This was mainly due to the greater focus placed on alcoholic drinks by duty free retailers and the rising level of outbound travel among the Belgian population. The development of low-cost carriers like Ryanair and Vueling helped to fuel the rise in outbound travel. As a result, duty free sales at Brussels South/Charleroi Airport increased significantly over the review period. Most notably, Belgian consumers focused more on premium and super premium products, such as single malt Scotch whisky. In Antwerp and Zeebrugge, Belgium’s main international sea ports, numerous retail outlets sell duty free products, including alcoholic drinks. Some of these also sell alcoholic drinks duty free to Belgian residents “through the back door” and “under the counter”.

Cross-border/private Imports

Everywhere in Belgium is less than 100km away from a border, making it easy for Belgians to shop abroad. Moreover, as Belgium is one of the most heavily taxed European countries, this is another reason to cross the closest border. In general, cross-border trade and private imports are very attractive options for many Belgians, with much lower off-trade prices charged for alcoholic drinks in neighbouring countries. While cross-border trade at individual level is well-known in Belgium, it is difficult to measure due to there being no official data. While cross-border purchasing appears to be almost non-existent for beer, some sources claim that private imports of wine from France adds 7-10% to official consumption figures. This would mean that Belgians consume around 27 litres of wine per capita annually rather than the 25-26 litres stated by official statistics.

KEY NEW PRODUCT LAUNCHES

With the two major trends in alcoholic drinks in Belgium in 2017 being premiumisation and demand for lower ABV beverages, most new product developments in 2017 focused on one of these areas. For example, beer saw the launch of a few non alcoholic beers, with this trend set to continue over the forecast period. With regard to premiumisation, brand manufacturers opted for more frequent limited editions, especially during festive periods.

Summary 1 Key New Product Developments 2017

Brand	NBO	Product	USP	Launch
Duvel Triple Hop Citra	Duvel Moortgat NV	Ale	Brewed with the American Citra hop and re-introduced permanently after having been voted the best limited edition product by Duvel customers.	March 2017
La Cambre Triple	Brasserie de la Cambre	Ale	A "tripel" craft beer with a relatively low ABV of 7.2%, has a light, sweet and malty taste.	January 2017
Carlsberg 0.0%	Carlsberg Importers NV SA	Non Alcoholic Beer	A non alcoholic beer, seeking to appeal to consumers looking to reduce their alcohol consumption.	December 2017
Benromach Organic	Alcobrands Belux	Single Malt Scotch Whisky	A single malt Scotch made from natural and organic ingredients.	November 2017
Larios Rosé	Beam Suntory	English Gin	A strawberry-flavoured pink gin, targeted at female drinkers.	November 2017
Gordon's Pink Gin	Diageo Belgium NV SA	English Gin	A softer, fruity gin, looking to breathe new life into the struggling gin category.	December 2017
Filliers Lemon-Cactus	Filliers Graanstokerij NV	Dutch Gin	An extension of Filliers' Dutch gin portfolio with an exotic cactus	May 2017

			flavour.	
Baileys Iced Coffee	Diageo Belgium NV SA	Spirit-based RTDs	A mix of coffee, milk and Baileys in a small 200ml can with an ABV of 4%. Available in mocha and latte variants.	November 2017
Liefmans Yell'Oh	Duvel Moortgat NV	Flavoured/Mixed Lager	A refreshing fruity beer mixing pineapple, lime, basil and apple, positioned as a summer beer to serve "on the rocks".	April 2017

Source: Euromonitor International

MARKET INDICATORS

Table 3 Retail Consumer Expenditure on Alcoholic Drinks 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
Total	3,034.3	3,115.3	3,216.4	3,327.5	3,364.2	3,496.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2016 data is forecast

MARKET DATA

Table 4 Sales of Alcoholic Drinks by Category: Total Volume 2012-2017

	2012	2013	2014	2015	2016	2017
Beer (million litres)	885.8	858.4	834.1	816.5	799.4	780.2
Cider/Perry ('000 litres)	462.0	454.1	445.1	438.6	437.8	441.5
RTDs/High-Strength Premixes ('000 litres)	4,843.2	4,894.1	4,926.5	4,875.1	4,582.0	4,394.0
Spirits ('000 litres)	37,216.7	37,223.4	36,855.4	36,538.5	30,226.2	27,780.8
Wine (million litres)	296.8	296.5	298.5	299.4	283.9	276.8
Alcoholic Drinks (million litres)	1,225.2	1,197.5	1,174.8	1,157.7	1,118.6	1,089.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 Sales of Alcoholic Drinks by Category: Total Value 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
Beer	4,369.2	4,339.2	4,287.8	4,277.0	4,282.4	4,328.2
Cider/Perry	4.3	4.3	4.3	4.3	4.3	4.4
RTDs/High-Strength Premixes	51.6	52.6	53.2	53.5	53.7	52.9
Spirits	1,152.0	1,191.7	1,213.7	1,250.9	1,157.9	1,108.7
Wine	2,653.7	2,694.9	2,776.1	2,855.2	2,906.3	2,890.1
Alcoholic Drinks	8,230.8	8,282.7	8,335.0	8,440.9	8,404.6	8,384.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2012-2017

% total volume growth	2016/17	2012-17 CAGR	2012/17 Total
Beer	-2.4	-2.5	-11.9
Cider/Perry	0.8	-0.9	-4.4
RTDs/High-Strength Premixes	-4.1	-1.9	-9.3
Spirits	-8.1	-5.7	-25.4
Wine	-2.5	-1.4	-6.8
Alcoholic Drinks	-2.6	-2.3	-11.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Sales of Alcoholic Drinks by Category: % Total Value Growth 2012-2017

% local currency, current value growth	2016/17	2012-17 CAGR	2012/17 Total
Beer	1.1	-0.2	-0.9
Cider/Perry	2.2	0.4	1.8
RTDs/High-Strength Premixes	-1.5	0.5	2.5
Spirits	-4.3	-0.8	-3.8
Wine	-0.6	1.7	8.9
Alcoholic Drinks	-0.2	0.4	1.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2017

	Off-trade	On-trade	Total
Beer (million litres)	431.6	348.6	780.2
Cider/Perry ('000 litres)	4.3	437.3	441.5
RTDs/High-Strength Premixes ('000 litres)	3,500.7	893.3	4,394.0
Spirits ('000 litres)	21,791.3	5,989.4	27,780.8
Wine (million litres)	210.6	66.2	276.8
Alcoholic Drinks (million litres)	667.4	422.1	1,089.6

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2017

EUR million	Off-trade	On-trade	Total
Beer	1,048.4	3,279.8	4,328.2
Cider/Perry	0.0	4.4	4.4
RTDs/High-Strength Premixes	29.6	23.3	52.9
Spirits	547.6	561.1	1,108.7
Wine	1,393.7	1,496.3	2,890.1
Alcoholic Drinks	3,019.3	5,365.0	8,384.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 10 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2017

% volume analysis	Off-trade	On-trade	Total
Beer	55.3	44.7	100.0
Cider/Perry	1.0	99.0	100.0
RTDs/High-Strength Premixes	79.7	20.3	100.0
Spirits	78.4	21.6	100.0
Wine	76.1	23.9	100.0
Alcoholic Drinks	61.3	38.7	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2017

% value analysis	Off-trade	On-trade	Total
Beer	24.2	75.8	100.0
Cider/Perry	0.4	99.6	100.0
RTDs/High-Strength Premixes	56.0	44.0	100.0
Spirits	49.4	50.6	100.0
Wine	48.2	51.8	100.0
Alcoholic Drinks	36.0	64.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 GBO Company Shares of Alcoholic Drinks: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Anheuser-Busch InBev NV	36.7	36.8	36.6	37.3	37.6
Heineken NV	9.0	8.9	8.8	9.0	9.3
Duvel Moortgat NV	3.2	3.2	3.3	3.4	3.5
Bavaria NV	-	-	-	1.5	2.0

Société Commerciale de Brasserie SA/Brouwerij Handelsmaatschappij NV	2.0	2.0	2.0	2.0	2.0
Diageo Plc	1.9	1.9	1.9	1.8	1.8
Carlsberg A/S	1.6	1.5	1.5	1.5	1.6
Bacardi & Co Ltd	1.2	1.3	1.3	1.3	1.3
Abdij der Trappisten van Westmalle	1.0	1.0	1.1	1.1	1.1
Abbaye Notre Dame de Scourmont	0.8	0.8	0.8	0.9	0.9
Private Label	14.7	14.9	15.1	15.1	14.9
Others	28.0	27.6	27.6	25.0	23.9
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2012-2017

% off-trade	2012	2013	2014	2015	2016	2017
Store-Based Retailing	96.0	95.8	95.6	95.4	95.1	94.9
- Grocery Retailers	96.0	95.8	95.6	95.4	95.1	94.9
-- Discounters	9.2	9.2	9.2	9.3	9.3	9.3
-- Food/drink/tobacco specialists	4.3	4.3	4.2	4.1	4.1	4.1
-- Hypermarkets	10.3	10.1	10.0	9.7	9.6	9.5
-- Small Grocery Retailers	12.0	12.0	11.9	11.9	11.9	12.0
--- Convenience Stores	5.3	5.5	5.5	5.6	5.7	5.8
--- Forecourt Retailers	0.8	0.8	0.7	0.7	0.6	0.6
--- Independent Small Grocers	5.8	5.7	5.7	5.6	5.6	5.6
-- Supermarkets	60.3	60.2	60.3	60.3	60.0	59.9
-- Other Grocery Retailers	0.0	0.0	-	0.0	-	-
- Non-Grocery Specialists	-	-	-	-	-	-
-- Drugstores/ parapharmacies	-	-	-	-	-	-
-- Other Non-Grocery Alcoholic Drinks Specialists	-	-	-	-	-	-
- Mixed Retailers	-	-	-	-	-	-
-- Department Stores	-	-	-	-	-	-
-- Mass Merchandisers	-	-	-	-	-	-
-- Variety Stores	-	-	-	-	-	-
-- Warehouse Clubs	-	-	-	-	-	-
Non-Store Retailing	4.0	4.2	4.4	4.6	4.9	5.1
- Direct Selling	0.5	0.5	0.5	0.4	0.4	0.4
- Homeshopping	0.0	0.0	0.0	0.0	0.0	0.0
- Internet Retailing	3.3	3.5	3.7	4.0	4.3	4.6
- Vending	0.2	0.2	0.2	0.2	0.2	0.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Distribution of Alcoholic Drinks by Format and Category: % Off-trade Volume 2017

% off-trade	B	C/P	RTD/HSP	S	W
Store-Based Retailing	91.2	97.3	93.3	93.0	90.4
- Grocery Retailers	91.2	97.3	93.3	93.0	90.4
-- Discounters	11.9	11.2	7.8	10.7	15.3
-- Food/drink/tobacco specialists	1.7	0.7	0.1	7.3	8.3
-- Hypermarkets	6.5	9.0	9.3	10.7	8.7
-- Small Grocery Retailers	7.9	10.0	15.4	3.0	6.7
--- Convenience Stores	4.0	7.5	7.2	2.8	3.1
--- Forecourt Retailers	0.7	0.8	0.2	0.0	0.1
--- Independent Small Grocers	3.2	1.7	8.0	0.2	3.5
-- Supermarkets	63.2	66.3	60.7	61.2	51.4
-- Other Grocery Retailers	0.0	0.0	0.0	0.0	0.0
- Non-Grocery Specialists	0.0	0.0	0.0	0.0	0.0
-- Drugstores/parapharmacies	0.0	0.0	0.0	0.0	0.0
-- Other Non-Grocery Alcoholic Drinks Specialists	0.0	0.0	0.0	0.0	0.0
- Mixed Retailers	0.0	0.0	0.0	0.0	0.0
-- Department Stores	0.0	0.0	0.0	0.0	0.0
-- Mass Merchandisers	0.0	0.0	0.0	0.0	0.0
-- Variety Stores	0.0	0.0	0.0	0.0	0.0
-- Warehouse Clubs	0.0	0.0	0.0	0.0	0.0
Non-Store Retailing	8.8	2.7	6.7	7.0	9.6
- Direct Selling	0.0	0.0	0.0	0.0	1.5
- Homeshopping	0.0	0.0	0.0	0.0	0.0
- Internet Retailing	8.8	2.7	6.7	7.0	8.1
- Vending	0.1	0.0	0.0	0.0	0.0
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: B = beer; C/P = cider/perry; RTD/HSP = RTDs/high-strength premixes; W = wine; S = spirits

Table 15 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2017-2022

Million litres	2017	2018	2019	2020	2021	2022
Beer	780.2	767.6	757.4	749.7	743.9	739.8
Cider/Perry	0.4	0.4	0.4	0.5	0.5	0.5
RTDs/High-Strength Premixes	4.4	4.3	4.2	4.1	4.0	4.0
Spirits	27.8	26.6	25.9	25.5	25.3	25.2
Wine	276.8	273.6	272.3	272.9	274.6	276.8
Alcoholic Drinks	1,089.6	1,072.6	1,060.3	1,052.7	1,048.3	1,046.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 16 Forecast Sales of Alcoholic Drinks by Category: Total Value 2017-2022

EUR million	2017	2018	2019	2020	2021	2022
Beer	4,328.2	4,344.1	4,366.5	4,396.7	4,434.3	4,483.3
Cider/Perry	4.4	4.5	4.5	4.6	4.7	4.7
RTDs/High-Strength Premixes	52.9	51.4	50.3	49.5	49.0	48.5
Spirits	1,108.7	1,077.1	1,061.1	1,051.9	1,037.7	1,035.4
Wine	2,890.1	2,874.3	2,882.0	2,896.3	2,921.5	2,954.4
Alcoholic Drinks	8,384.3	8,351.4	8,364.5	8,399.0	8,447.1	8,526.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 17 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022

% total volume growth	2017/18	2017-22 CAGR	2017/22 Total
Beer	-1.6	-1.1	-5.2
Cider/Perry	0.7	0.9	4.5
RTDs/High-Strength Premixes	-2.8	-1.9	-9.0
Spirits	-4.3	-2.0	-9.4
Wine	-1.1	0.0	0.0
Alcoholic Drinks	-1.6	-0.8	-4.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022

% local currency, constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Beer	0.4	0.7	3.6
Cider/Perry	1.6	1.4	7.1
RTDs/High-Strength Premixes	-2.9	-1.7	-8.4
Spirits	-2.8	-1.4	-6.6
Wine	-0.5	0.4	2.2
Alcoholic Drinks	-0.4	0.3	1.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DEFINITIONS

Explanations of words and/or terminology used in this report are as follows:

- GBO refers to Global Brand Owner, which is the ultimate owner of a brand.
- NBO refers to National Brand Owner, which is the company licensed to distribute a brand on behalf of a GBO. The NBO may be a subsidiary of a GBO or it may be a completely separate

company. Share tables at both GBO and NBO level are provided in the report. Reference to shares in the report analysis is at NBO level.

SOURCES

Sources used during the research included the following:

Summary 2 Research Sources

Official Sources	
	BrusselsWinexpo
	Douanes Belges
	Inspection des denrées alimentaires
	Institut National de Statistique (INS)
	IREB
	Office Belge du Commerce Extérieur
	PEE Bruxelles
Trade Associations	
	Association des Journalistes Brassicoles Belges (AJBB)
	Belgian Brewers
	Belgian Family Brewers
	Bière Association
	Bière Bel
	Bureau National Interprofessionnel du Cognac (BNIC)
	Cámara Nacional de la Industria Tequilera
	Comité Interprofessionnel des Vins de Bordeaux
	Comité Interprofessionnel du Vin de Champagne (CIVC)
	Confédération des Brasseurs Belges
	Consejo Regulador de las Denominaciones de Origen Jerez
	Consejo Regulador del Cava
	Consorzio per la Tutela del Vino Marsala DOC
	Febed
	Fédération Belge des Importateurs de Vin et Spiritueux
	Federation des Brasseurs
	Fédération Nationale des Négociants en Bières et Eaux de Boisson
	Fédération Nationale Horeca
	FEVIS
	Instituto do Vinho Bordado e do Artesanato da Madeira

	Instituto dos Vinhos do Douro e Porto
	Les amis de la Biere
	Les Brasseurs Belges
	Office International de la Vigne et du Vin
	Organisation Nationale Vins et Spiritueux
	Scotch Single Malt Association
	Scotch Whisky Association
	The Brewers of Europe
Trade Press	Beverage World
	Bière Magazine
	Bières Passion magazine
	Cafe Revue
	Distributie Vandaag
	Distribution d'aujourd'hui
	Drinks International
	Gondola Magazine
	Horeca Magazine
	In Vino Veritas
	La Libre Belgique
	Le journal du brasseur
	Le Soir
	L'echo
	Retail
	Retail Detail
	Storecheck
	Tendances
	The Drinks Business
	Trends.be
	Underthecork.be
	Vino Magazine
	VinoPres
	Wine & Spirits International
	World Drink Trends

Source: Euromonitor International

BEER IN BELGIUM - CATEGORY ANALYSIS

HEADLINES

- In 2017 beer records a total volume decline of 2% to stand at sales of 780 million litres
- Wider category decline largely driven by lager
- Non alcoholic beer the best performer with a 14% increase in total volume sales
- Average unit price rises by 4%
- Anheuser-Busch InBev remains dominant but small breweries are gaining share
- Over the forecast period beer will post a total volume CAGR decline of 1% as sales fall to 740 million litres in 2022

PROSPECTS

Total Volume Sales Continue To Decline

Beer consumption in Belgium has been declining for many years, with this set to continue over the forecast period. There are multiple reasons for this, with the first being an ongoing poor performance from lager. This can be linked to a decline in the number of pubs and cafés, where lager is mostly consumed, and an increase in prices. Indeed, lager is dominated by Anheuser-Busch InBev, which uses its position in the marketplace to increase prices. These two factors will likely continue to put pressure on the lager category.

The consumption behaviour of younger generations is also having a significant impact on beer. On the one hand, younger generations have expanded their alcohol horizons beyond lager. Hence, the category is facing increasing competition from other types of alcoholic and non alcoholic beverages. On the other hand, younger generations are also adopting healthier and more responsible consumption habits.

Ale Registers Positive, Albeit Modest, Total Volume Growth

Aside from the factors mentioned above, the decline in beer consumption can also be attributed to the “less but better” trend. Belgians are increasingly looking to savour “special beers” such as ales, which are produced in small breweries or microbreweries. The number of microbreweries is constantly increasing in Belgium, with brewers feeding the craft trend by launching ever more beers. Lost in Spice, a blond beer with spicy flavours, launched in 2017 by Brouwerij De Koninck, and the success of Brussels Beer, a collaborative project based on the creation of innovative new beers, are two good examples of this desire to expand the craft beer offering. This is attracting new consumers to the ale category. With an increasing consumer base eager to discover new ales and an expanding supply, the ale category is expected to continue to grow over the forecast period.

Non Alcoholic Beer Remains the Fastest Growing Category

While the distribution of traditional beers like Trappist and local ales is increasing in both the on-trade and off-trade, interest in non alcoholic beer is also benefiting the category due to being perceived as healthier, with many drinkers looking to adopt more responsible consumption

habits. Anheuser-Busch InBev has helped drive this societal change via a massive marketing campaign for Jupiler 0,0. Its success has led to other lager manufacturers like Alken Maes and Carlsberg following suit. In fact, Duvel Moortgat, which owns Vedett, a well-known premium domestic lager brand, has gone one step further by launching a mineral water under the same brand. Nevertheless, non alcoholic beer is still a very small category, albeit one which offers significant growth potential as a result of increasing consumer acceptance. In addition, to attract an increasing number of lager drinkers, manufacturers of non alcoholic beer are focusing on new consumption occasions, such as work drinks. The launch of more new brands will likely contribute to the further strong growth of the category over the forecast period.

COMPETITIVE LANDSCAPE

Anheuser-Busch Inbev Maintains Its Dominant Position

Anheuser-Busch InBev continued to dominate beer in Belgium in 2017. Due to its ongoing strength, the company increased its prices in order to partially compensate for the ongoing decline in volume sales. In 2017, it also revamped the packaging of its Jupiler brand to give it a more modern image. Despite its dominance, especially in lager, smaller players remained both active and creative. For example, second-ranked Alken Maes completely relaunched its Cristal lager, giving it a craft beer image.

Smaller Producers Invest in Brand Image

Ale producers were very active in 2017 as they recognised consumers' desire for new products. Some remained fairly traditional, for example Duvel Moortgat, which reintroduced its previously limited edition Duvel Triple Hop Citra, while others explored new areas, for instance Brouwerij De Koninck with its Mint the Chocolate porter-style beer. Two large marketing campaigns in the ale category in 2017 supported the Tongerlo and Rodenbach brands. Indeed, Brouwerij Haacht changed the name of its Tongerlo beer variants to Lux, Nor, Prior and Pax in order to give it a more abbey-style image. Brouwerij Palm, meanwhile, refreshed the image of its Rodenbach brand and also launched Rodenbach Vintage. It is also worth mentioning that the Palm brand, which has a strong history in Belgium, was refreshed and relaunched in 2017 after the acquisition of Brouwerij Palm by the Dutch company Bavaria.

the Risk of Oversaturation

The number of small breweries and microbreweries and the pace of new launches continued to increase rapidly in 2017, although some new beers are often not made to last and therefore their quality is sometimes neglected.

Even though ale (craft beer) consumption is rising in Belgium, the number of new products is increasing faster than volume sales, thus making the pie smaller for manufacturers. This phenomenon can also be seen in the beer sections at supermarkets, which are becoming increasingly crowded. It is thus becoming necessary for stakeholders to improve the visibility of their beers. For example, it is difficult to differentiate between a dark beer and a blond beer. Therefore, manufacturers and retailers will have to work together to improve visibility and help the consumer make the right choice.

CATEGORY BACKGROUND

Lager Price Band Methodology

- Despite falling consumption, mid-priced lager continued to account for well over half of overall beer volume sales in 2017. Premium lager gained ground, largely thanks to domestic premium lagers, such as Duvel Moortgat's Duvel and Vedett brands. Economy lager, on the other hand, accounted for a minor and declining share of total volume sales.
- Local production became more important over the review period due to the rising popularity of ale.

Summary 3 Lager by Price Band 2017

Category	Price range per litre
Premium	Above EUR3.60
Mid-priced	Between EUR1.91-3.59
Economy	Below EUR1.90

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Price bands for lager are based primarily on price, but positioning and packaging are other factors that are considered in classification

Table 19 Number of Breweries 2012-2017

	2012	2013	2014	2015	2016	2017
TOTAL	150	160	168	199	224	n/a

Source: Euromonitor International

CATEGORY DATA

Table 20 Sales of Beer by Category: Total Volume 2012-2017

million litres	2012	2013	2014	2015	2016	2017
Dark Beer	252.6	250.7	248.8	247.6	247.3	247.8
- Ale	184.6	185.0	184.9	184.8	185.2	186.0
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	68.0	65.8	63.9	62.8	62.1	61.8
Lager	619.7	594.5	572.4	556.1	538.7	517.9
- Flavoured/Mixed Lager	7.7	8.0	7.9	7.9	8.0	8.2
- Standard Lager	612.1	586.6	564.5	548.2	530.7	509.7
-- Premium Lager	53.5	52.2	51.0	50.0	49.2	48.4
--- Domestic Premium Lager	27.6	27.6	27.5	27.5	27.5	27.4
--- Imported Premium Lager	25.8	24.7	23.5	22.5	21.7	21.0
-- Mid-Priced Lager	542.7	519.2	499.1	484.3	468.3	448.8
--- Domestic Mid-Priced Lager	532.6	509.2	489.3	474.8	459.2	440.0
--- Imported Mid-Priced	10.1	10.0	9.8	9.5	9.2	8.8

Lager						
-- Economy Lager	15.9	15.2	14.4	13.9	13.1	12.4
--- Domestic Economy Lager	15.9	15.2	14.4	13.9	13.1	12.4

--- Imported Economy Lager	-	-	-	-	-	-
Non Alcoholic Beer	8.9	8.8	8.6	8.7	9.3	10.5
Stout	4.5	4.4	4.3	4.2	4.1	4.0
Beer	885.8	858.4	834.1	816.5	799.4	780.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Sales of Beer by Category: Total Value 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
Dark Beer	1,516.6	1,549.2	1,578.9	1,614.8	1,656.1	1,690.2
- Ale	1,063.1	1,098.6	1,130.4	1,163.4	1,199.8	1,228.3
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	453.5	450.6	448.6	451.3	456.3	461.9
Lager	2,781.4	2,718.2	2,636.7	2,588.9	2,550.3	2,557.4
- Flavoured/Mixed Lager	57.0	59.8	60.6	61.3	63.2	65.9
- Standard Lager	2,724.4	2,658.3	2,576.1	2,527.7	2,487.0	2,491.5
-- Premium Lager	359.1	361.7	362.3	362.6	364.2	365.7

--- Domestic Premium Lager	159.4	165.3	169.6	174.1	179.3	183.2

--- Imported Premium Lager	199.7	196.4	192.7	188.6	185.0	182.6
-- Mid-Priced Lager	2,333.9	2,266.2	2,184.6	2,136.7	2,095.7	2,099.8

--- Domestic Mid-Priced Lager	2,320.2	2,252.5	2,170.9	2,123.1	2,082.3	2,086.6

--- Imported Mid-Priced Lager	13.7	13.8	13.7	13.6	13.4	13.2
-- Economy Lager	31.5	30.4	29.3	28.3	27.1	26.0

--- Domestic Economy Lager	31.5	30.4	29.3	28.3	27.1	26.0

--- Imported Economy Lager	-	-	-	-	-	-
Non Alcoholic Beer	40.8	41.3	41.5	42.4	45.0	49.4
Stout	30.4	30.5	30.6	30.8	31.0	31.1
Beer	4,369.2	4,339.2	4,287.8	4,277.0	4,282.4	4,328.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Sales of Beer by Category: % Total Volume Growth 2012-2017

% total volume growth	2016/17	2012-17 CAGR	2012/17 Total
Dark Beer	0.2	-0.4	-1.9
- Ale	0.4	0.1	0.7
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	-0.5	-1.9	-9.2
Lager	-3.9	-3.5	-16.4
- Flavoured/Mixed Lager	2.4	1.4	7.2

- Standard Lager	-4.0	-3.6	-16.7
-- Premium Lager	-1.6	-2.0	-9.5
--- Domestic Premium Lager	-0.6	-0.2	-0.9
--- Imported Premium Lager	-3.0	-4.0	-18.6
-- Mid-Priced Lager	-4.2	-3.7	-17.3
--- Domestic Mid-Priced Lager	-4.2	-3.7	-17.4
--- Imported Mid-Priced Lager	-3.8	-2.7	-12.7
-- Economy Lager	-5.4	-4.8	-21.9
--- Domestic Economy Lager	-5.4	-4.8	-21.9
--- Imported Economy Lager	-	-	-
Non Alcoholic Beer	13.6	3.4	18.0
Stout	-2.3	-2.5	-11.7
Beer	-2.4	-2.5	-11.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Sales of Beer by Category: % Total Value Growth 2012-2017

% local currency, current value growth

	2016/17	2012-17 CAGR	2012/17 Total
Dark Beer	2.1	2.2	11.5
- Ale	2.4	2.9	15.5
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	1.2	0.4	1.9
Lager	0.3	-1.7	-8.1
- Flavoured/Mixed Lager	4.3	3.0	15.7
- Standard Lager	0.2	-1.8	-8.5
-- Premium Lager	0.4	0.4	1.9
--- Domestic Premium Lager	2.2	2.8	14.9
--- Imported Premium Lager	-1.3	-1.8	-8.6
-- Mid-Priced Lager	0.2	-2.1	-10.0
--- Domestic Mid-Priced Lager	0.2	-2.1	-10.1
--- Imported Mid-Priced Lager	-1.8	-0.7	-3.6
-- Economy Lager	-4.3	-3.8	-17.6
--- Domestic Economy Lager	-4.3	-3.8	-17.6
--- Imported Economy Lager	-	-	-
Non Alcoholic Beer	9.9	3.9	21.2
Stout	0.2	0.4	2.2
Beer	1.1	-0.2	-0.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Sales of Beer by Off-trade vs On-trade: Volume 2012-2017

million litres	2012	2013	2014	2015	2016	2017
Off-trade	456.7	454.3	451.8	448.8	443.2	431.6
On-trade	429.1	404.1	382.3	367.7	356.2	348.6
Total	885.8	858.4	834.1	816.5	799.4	780.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Sales of Beer by Off-trade vs On-trade: Value 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
Off-trade	960.4	979.6	996.1	1,014.4	1,031.0	1,048.4
On-trade	3,408.8	3,359.6	3,291.7	3,262.6	3,251.4	3,279.8
Total	4,369.2	4,339.2	4,287.8	4,277.0	4,282.4	4,328.2

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Sales of Beer by Off-trade vs On-trade: % Volume Growth 2012-2017

% volume growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	-2.6	-1.1	-5.5
On-trade	-2.1	-4.1	-18.8
Total	-2.4	-2.5	-11.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 Sales of Beer by Off-trade vs On-trade: % Value Growth 2012-2017

% constant value growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	1.7	1.8	9.2
On-trade	0.9	-0.8	-3.8
Total	1.1	-0.2	-0.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 GBO Company Shares of Beer: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Anheuser-Busch InBev NV	51.1	51.9	51.9	52.2	52.5
Heineken NV	12.5	12.5	12.5	12.5	13.0
Duvel Moortgat NV	4.4	4.5	4.6	4.8	4.9
Bavaria NV	-	-	-	2.1	2.8
Société Commerciale de Brasserie SA/Brouwerij Handelsmaatschappij NV	2.8	2.8	2.8	2.8	2.8
Carlsberg A/S	2.2	2.2	2.2	2.2	2.2
Abdij der Trappisten van Westmalle	1.4	1.5	1.5	1.6	1.6
Diageo Plc	1.6	1.6	1.6	1.5	1.5
Abbaye Notre Dame de Scourmont	1.1	1.1	1.2	1.2	1.2
Abbaye Notre Dame d'Orval	0.4	0.5	0.5	0.5	0.5
Bavick NV	0.4	0.4	0.4	0.4	0.4
Brasserie Dubuisson NV SA	0.3	0.3	0.3	0.3	0.3
Brussels Beer Project	-	-	0.1	0.1	0.2

Abbaye Notre Dame de Saint-Remy	0.2	0.2	0.2	0.2	0.2
Brasserie de Bertinchamps	-	0.1	0.1	0.1	0.2
Asahi Group Holdings Ltd	-	-	-	0.2	0.2
Palm NV, Brouwerij	2.7	2.7	2.7	0.6	-
Brouwerij Bosteels NV	0.2	0.2	0.2	-	-
SABMiller Plc	0.2	0.2	0.2	-	-
Modelo SA de CV, Grupo	-	-	-	-	-
De Koninck NV SA, Brouwerij	-	-	-	-	-
Private Label	4.1	4.0	4.0	4.0	3.8
Others	14.5	13.4	13.1	12.6	11.7
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 29 NBO Company Shares of Beer: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Anheuser-Busch InBev NV	50.7	51.4	51.4	51.5	51.7
Alken Maes NV SA, Brouwerijen	12.1	12.1	12.1	12.2	12.7
Duvel Moortgat NV	4.4	4.5	4.6	4.8	4.9
Palm NV, Brouwerij	2.1	2.1	2.1	2.1	2.8
Brouwerij Haacht NV SA	2.8	2.8	2.8	2.8	2.8
John Martin SA	2.0	2.0	2.0	2.0	1.9
Delhaize 'Le Lion' SA	1.8	1.8	1.8	1.8	1.7
Abdij der Trappisten van Westmalle	1.4	1.5	1.5	1.6	1.6
Carrefour Belgium SA/NV	1.6	1.6	1.6	1.6	1.5
Abbaye Notre Dame de Scourmont	1.1	1.1	1.2	1.2	1.2
Carlsberg Importers NV SA	1.2	1.2	1.2	1.2	1.2
Heineken NV	0.9	0.9	0.9	0.8	0.9
Abbaye Notre Dame d'Orval	0.4	0.5	0.5	0.5	0.5
Modelo SA de CV, Grupo	0.5	0.5	0.5	0.5	0.5
Bavick NV	0.4	0.4	0.4	0.4	0.4
Brasserie Dubuisson NV SA	0.3	0.3	0.3	0.3	0.3
Brouwerij Bosteels NV	0.2	0.2	0.2	0.2	0.3
Brussels Beer Project	-	-	0.1	0.1	0.2
Abbaye Notre Dame de Saint-Remy	0.2	0.2	0.2	0.2	0.2
Brasserie de Bertinchamps	-	0.1	0.1	0.1	0.2
SABMiller Plc	0.1	0.1	0.1	0.1	0.1
Grolsch, Koninklijke NV	0.1	0.1	0.1	0.1	0.1
Rodenbach NV SA	0.6	0.6	0.6	0.6	-
De Koninck NV SA, Brouwerij	-	-	-	-	-
Jet Import NV SA	-	-	-	-	-
Other Private Label	0.6	0.6	0.6	0.5	0.5
Others	14.6	13.6	13.3	12.7	11.8
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 LBN Brand Shares of Beer: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
Jupiler	Anheuser-Busch InBev NV	32.2	32.0	32.0	31.8
Lefte	Anheuser-Busch InBev NV	6.3	6.4	6.4	6.4
Stella Artois	Anheuser-Busch InBev NV	5.8	5.8	5.9	5.8
Maes Pils (Heineken NV)	Alken Maes NV SA, Brouwerijen	5.7	5.7	5.7	5.7
Hoegaarden	Anheuser-Busch InBev NV	2.6	2.7	2.8	2.8
Primus (Société Commerciale de Brasserie SA/ Brouwerij Handelsmaatschappij NV)	Brouwerij Haacht NV SA	2.6	2.5	2.5	2.5
Palm (Bavaria NV)	Palm NV, Brouwerij	-	-	2.1	2.2
Grimbergen (Heineken NV)	Alken Maes NV SA, Brouwerijen	1.9	1.9	1.9	1.9
Vedett	Duvel Moortgat NV	1.6	1.6	1.6	1.7
Delhaize (Private Label)	Delhaize 'Le Lion' SA	1.8	1.8	1.8	1.7
Palm	Palm NV, Brouwerij	2.1	2.1	-	-
Other Private Label (Private Label)	Other Private Label	0.6	0.6	0.5	0.5
Others	Others	36.9	36.9	36.7	37.1
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 Forecast Sales of Beer by Category: Total Volume 2017-2022

million litres	2017	2018	2019	2020	2021	2022
Dark Beer	247.8	248.5	249.5	250.7	252.0	253.7
- Ale	186.0	187.0	188.2	189.5	190.8	192.4
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	61.8	61.5	61.3	61.2	61.2	61.3
Lager	517.9	503.0	489.6	478.3	468.6	460.1
- Flavoured/Mixed Lager	8.2	8.4	8.6	8.7	8.9	9.1
- Standard Lager	509.7	494.6	481.1	469.6	459.7	451.0
-- Premium Lager	48.4	47.8	47.5	47.4	47.5	47.7
--- Domestic Premium Lager	27.4	27.4	27.6	27.9	28.4	28.9
--- Imported Premium Lager	21.0	20.4	19.9	19.5	19.1	18.8
-- Mid-Priced Lager	448.8	434.9	422.2	411.2	401.6	393.0
--- Domestic Mid-Priced Lager	440.0	426.4	413.9	403.1	393.7	385.3
--- Imported Mid-Priced Lager	8.8	8.5	8.3	8.0	7.9	7.7
-- Economy Lager	12.4	11.9	11.4	11.0	10.6	10.3
--- Domestic Economy Lager	12.4	11.9	11.4	11.0	10.6	10.3
--- Imported Economy	-	-	-	-	-	-

Lager						
Non Alcoholic Beer	10.5	12.2	14.4	16.9	19.5	22.3
Stout	4.0	3.9	3.9	3.8	3.8	3.8
Beer	780.2	767.6	757.4	749.7	743.9	739.8

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 32 Forecast Sales of Beer by Category: Total Value 2017-2022

EUR million	2017	2018	2019	2020	2021	2022
Dark Beer	1,690.2	1,728.6	1,769.4	1,812.6	1,859.5	1,910.6
- Ale	1,228.3	1,261.0	1,295.8	1,332.6	1,373.1	1,417.8
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	461.9	467.6	473.6	480.0	486.4	492.8
Lager	2,557.4	2,530.0	2,505.0	2,484.5	2,467.0	2,456.3
- Flavoured/Mixed Lager	65.9	68.1	70.5	72.8	75.0	77.5
- Standard Lager	2,491.5	2,461.9	2,434.5	2,411.7	2,392.0	2,378.8
-- Premium Lager	365.7	366.3	367.5	369.4	371.8	375.0
--- Domestic Premium Lager	183.2	186.8	190.4	194.2	198.3	202.9
--- Imported Premium Lager	182.6	179.5	177.1	175.2	173.5	172.1
-- Mid-Priced Lager	2,099.8	2,070.7	2,043.0	2,019.0	1,997.5	1,981.6
--- Domestic Mid-Priced Lager	2,086.6	2,057.9	2,030.5	2,006.7	1,985.4	1,969.8
--- Imported Mid-Priced Lager	13.2	12.8	12.4	12.2	12.1	11.8
-- Economy Lager	26.0	24.9	24.1	23.3	22.7	22.2
--- Domestic Economy Lager	26.0	24.9	24.1	23.3	22.7	22.2
--- Imported Economy Lager	-	-	-	-	-	-
Non Alcoholic Beer	49.4	54.3	60.6	67.6	75.3	83.4
Stout	31.1	31.3	31.6	32.0	32.4	33.0
Beer	4,328.2	4,344.1	4,366.5	4,396.7	4,434.3	4,483.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 33 Forecast Sales of Beer by Category: % Total Volume Growth 2017-2022

% total volume growth	2017/18	2017-22 CAGR	2017/22 Total
Dark Beer	0.3	0.5	2.4
- Ale	0.6	0.7	3.5
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	-0.5	-0.2	-0.9
Lager	-2.9	-2.3	-11.2
- Flavoured/Mixed Lager	2.1	1.9	10.1
- Standard Lager	-2.9	-2.4	-11.5
-- Premium Lager	-1.2	-0.3	-1.5
--- Domestic Premium Lager	0.1	1.1	5.6
--- Imported Premium Lager	-2.9	-2.2	-10.7
-- Mid-Priced Lager	-3.1	-2.6	-12.4

--- Domestic Mid-Priced Lager	-3.1	-2.6	-12.4
--- Imported Mid-Priced Lager	-3.4	-2.7	-13.0
-- Economy Lager	-4.4	-3.7	-17.1
--- Domestic Economy Lager	-4.4	-3.7	-17.1
--- Imported Economy Lager	-	-	-
Non Alcoholic Beer	15.4	16.2	112.0
Stout	-1.8	-1.2	-5.8
Beer	-1.6	-1.1	-5.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 34 Forecast Sales of Beer by Category: % Total Value Growth 2017-2022

% local currency, constant value growth

	2017/2018	2017-22 CAGR	2017/22 Total
Dark Beer	2.3	2.5	13.0
- Ale	2.7	2.9	15.4
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	1.2	1.3	6.7
Lager	-1.1	-0.8	-4.0
- Flavoured/Mixed Lager	3.3	3.3	17.5
- Standard Lager	-1.2	-0.9	-4.5
-- Premium Lager	0.2	0.5	2.5
--- Domestic Premium Lager	2.0	2.1	10.8
--- Imported Premium Lager	-1.7	-1.2	-5.7
-- Mid-Priced Lager	-1.4	-1.2	-5.6
--- Domestic Mid-Priced Lager	-1.4	-1.1	-5.6
--- Imported Mid-Priced Lager	-3.0	-2.1	-10.1
-- Economy Lager	-4.0	-3.1	-14.6
--- Domestic Economy Lager	-4.0	-3.1	-14.6
--- Imported Economy Lager	-	-	-
Non Alcoholic Beer	9.8	11.0	68.7
Stout	0.6	1.2	6.1
Beer	0.4	0.7	3.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CIDER/PERRY IN BELGIUM - CATEGORY ANALYSIS

HEADLINES

- In 2017 cider/perry grows by 1% in total volume terms to reach sales of 442,000 litres
- Category growth supported by improved distribution and communication
- Average unit price rises by 1%
- Stassen remains the clear category leader with a 42% share of total volume sales
- Over the forecast period cider/perry is expected to post a total volume CAGR of 1% to reach sales of 461,000 litres in 2022

PROSPECTS

“modern” Ciders A New Trend Among Younger Generations

“Modern” cider is a sweet alcoholic beverage made from fruit juice concentrate and sold in similar packaging to craft beer, thus particularly appealing to younger generations in Belgium. Indeed, major players like Carlsberg (Somersby) and Alken Maes (Strongbow) have become very active in terms of communication, sampling and expanding their distribution networks. Younger generations are looking for a light drink with a sweeter taste than beer, with “modern” ciders appearing to satisfy this desire. As a result, “modern” ciders are taking some sales away from beer, at least among younger generations, with the category thus expected to continue to record positive growth over the forecast period.

Traditional Cider in Decline

While “modern” ciders are growing thanks to effective marketing and their sweet taste, thus appealing to younger Belgians, the same cannot be said for traditional cider. Indeed, traditional cider remained on a downward trajectory in 2017 because of its old-fashioned image and a lack of investment on the part of manufacturers.

Alcohol-free Cider Could Have A Role To Play Over the Forecast Period

Over the forecast period cider/perry could benefit from the alcohol-free trend. Indeed, more and more Belgians are becoming more responsible drinkers and are turning to non alcoholic versions of beverages such as beer, bitters and cocktails. This trend could also permeate cider/perry. In fact, traditional cider manufacturers have been selling alcohol-free cider for many years, with sales led by Stassen Degré Zéro. However, these beverages do not have a very modern image and so manufacturers will need to change their marketing strategies if they are to profit from the growth of alcohol-free beverages. Manufacturers of “modern” ciders, meanwhile, have not yet come up with alcohol-free variants, although these can be expected to appear over the forecast period.

COMPETITIVE LANDSCAPE

New Players Could Be Attracted To One of the Market's Few Growth Categories

Alken Maes with Strongbow and Carlsberg Importers with Somersby have breathed new life into the cider/perry category since their arrival a few years ago, with the category's ongoing growth possibly attracting more new players over the forecast period. One company which might be interested is the leading player in traditional cider, Stassen, which is owned by Heineken. In fact, Stassen already offers a range of "modern" ciders, although these are not currently available in traditional retail outlets. However, this is expected to change over the forecast period. The leading beer brewer, Anheuser-Busch InBev, is also following the cider/perry category very closely. Indeed, under its Stella Artois brand, it already sells cider in other countries such as the UK. Stella Artois cider was launched in Belgium a few years ago but was withdrawn due to a lack of demand. Over the forecast period it is possible that the company will relaunch it. Meanwhile, smaller player Jet Import expanded its range of premium drinks in 2017, adding the brand Good Cider, while local player Ruwet launched Belgian Craft Cider, made from local apples and organic ingredients. Established players are also continuing to extend their portfolios, with Carlsberg Importers, for instance, introducing Somersby Red Rhubarb in 2017.

CATEGORY DATA

Table 35 Sales of Cider/Perry: Total Volume 2012-2017

'000 litres	2012	2013	2014	2015	2016	2017
Cider/Perry	462.0	454.1	445.1	438.6	437.8	441.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 36 Sales of Cider/Perry: Total Value 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
Cider/Perry	4.3	4.3	4.3	4.3	4.3	4.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 37 Sales of Cider/Perry: % Total Volume Growth 2012-2017

% total volume growth	2016/17	2012-17 CAGR	2012/17 Total
Cider/Perry	0.8	-0.9	-4.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 38 Sales of Cider/Perry: % Total Value Growth 2012-2017

% local currency, current value growth

	2016/17	2012-17 CAGR	2012/17 Total
Cider/Perry	2.2	0.4	1.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 39 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2012-2017

'000 litres	2012	2013	2014	2015	2016	2017
Off-trade	3.0	3.0	3.0	2.9	3.3	4.3
On-trade	458.9	451.1	442.1	435.7	434.5	437.3
Total	462.0	454.1	445.1	438.6	437.8	441.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 40 Sales of Cider/Perry by Off-trade vs On-trade: Value 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
Off-trade	0.0	0.0	0.0	0.0	0.0	0.0
On-trade	4.3	4.3	4.3	4.3	4.3	4.4
Total	4.3	4.3	4.3	4.3	4.3	4.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 41 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2012-2017

% volume growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	28.8	6.9	39.9
On-trade	0.6	-1.0	-4.7
Total	0.8	-0.9	-4.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 42 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2012-2017

% constant value growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	31.6	8.7	52.1
On-trade	2.1	0.3	1.6
Total	2.2	0.4	1.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 GBO Company Shares of Cider/Perry: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Heineken NV	50.9	50.5	50.2	52.1	51.0
Carlsberg A/S	5.6	5.8	7.0	8.5	9.7
Ruwet NV SA	3.1	2.5	2.0	1.7	1.6
C&C Group Plc	3.3	2.6	2.0	1.7	1.5
Stassen NV SA	-	-	-	-	-
Private Label	12.9	13.1	13.3	12.2	12.0
Others	24.2	25.5	25.5	23.9	24.2
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 44 NBO Company Shares of Cider/Perry: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Stassen NV SA	50.9	50.5	50.2	44.1	41.9
Carlsberg Importers NV SA	5.6	5.8	7.0	8.5	9.7
Alken Maes NV SA, Brouwerijen	-	-	-	8.0	9.1
Etn Franz Colruyt NV	3.7	3.8	3.8	3.5	3.4
Delhaize 'Le Lion' SA	3.4	3.4	3.5	3.2	3.1
Carrefour Belgium SA/NV	3.4	3.4	3.5	3.1	3.1
Ruwet NV SA	3.1	2.5	2.0	1.7	1.6
John Martin SA	3.3	2.6	2.0	1.7	1.5
Other Private Label	2.5	2.6	2.6	2.4	2.4
Others	24.2	25.5	25.5	23.9	24.2
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 45 LBN Brand Shares of Cider/Perry: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
Stassen (Heineken NV)	Stassen NV SA	-	50.2	44.1	41.9
Somersby (Carlsberg A/S)	Carlsberg Importers NV SA	5.8	7.0	8.5	9.7
Strongbow (Heineken NV)	Alken Maes NV SA, Brouwerijen	-	-	8.0	9.1
Colruyt (Private Label)	Etn Franz Colruyt NV	3.8	3.8	3.5	3.4
Delhaize (Private Label)	Delhaize 'Le Lion' SA	3.4	3.5	3.2	3.1
Carrefour (Private Label)	Carrefour Belgium SA/NV	3.4	3.5	3.1	3.1
Ruwet	Ruwet NV SA	2.5	2.0	1.7	1.6
Magners (C&C Group Plc)	John Martin SA	2.6	2.0	1.7	1.5
Stassen Bio	Stassen NV SA	-	-	-	-
Stassen Excellence	Stassen NV SA	-	-	-	-

Other Private Label (Private Label)	Other Private Label	2.6	2.6	2.4	2.4
Others	Others	76.0	25.5	23.9	24.2
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 46 Forecast Sales of Cider/Perry: Total Volume 2017-2022

'000 litres	2017	2018	2019	2020	2021	2022
Cider/Perry	441.5	444.8	448.3	452.3	456.5	461.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 47 Forecast Sales of Cider/Perry: Total Value 2017-2022

EUR million	2017	2018	2019	2020	2021	2022
Cider/Perry	4.4	4.5	4.5	4.6	4.7	4.7

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 48 Forecast Sales of Cider/Perry: % Total Volume Growth 2017-2022

% total volume growth	2017/18	2017-22 CAGR	2017/22 Total
Cider/Perry	0.7	0.9	4.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 49 Forecast Sales of Cider/Perry: % Total Value Growth 2017-2022

% local currency, constant value growth	2017/2018	2017-22 CAGR	2017/22 Total
Cider/Perry	1.6	1.4	7.1

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

RTDS/HIGH-STRENGTH PREMIXES IN BELGIUM - CATEGORY ANALYSIS

HEADLINES

- In 2017 RTDs/high-strength premixes records a total volume decline of 4% to stand at sales of 4.4 million litres
- Growth of lower ABV drinks has a strong impact on RTDs/high-strength premixes
- High-strength premixes registers the heaviest total volume decline of 5%
- Average unit price rises by 3%
- Bacardi Martini remains the clear category leader with a 41% share of total volume sales
- Over the forecast period RTDs/high-strength premixes is expected to post a total volume CAGR decline of 2% as sales fall to below 4.0 million litres in 2022

PROSPECTS

Category Suffers From A General Fall in Consumption of High Abv Drinks

Sales of RTDs/high-strength premixes are declining in Belgium for several reasons. The first is that, like other alcoholic drinks, a rise in excise duty has driven many Belgian consumers to buy their alcohol in a neighbouring country. As a direct or indirect consequence of the increase, Belgians are also reducing their consumption of high ABV beverages as they seek to adopt more responsible drinking habits. This trend is also being seen among younger generations, the traditional consumers of RTDs/high-strength premixes, who are turning to lower ABV options like cider or flavoured/mixed lager. In addition, some RTDs/high-strength premixes are perceived as very artificial, which goes against the growing trend for all-things natural. Finally, due to the category's target audience, manufacturers of RTDs/high-strength premixes are unable to use premiumisation to drive sales. Moreover, many alcoholic drinks manufacturers are promoting homemade cocktails. With all these factors working against the category, RTDs/high-strength premixes is expected to remain on a downward trajectory over the forecast period.

On-trade Opportunity for Rtds/high-strength Premixes

Recent developments in the on-trade channel could provide an opportunity for RTDs/high-strength premixes. Indeed, traditional on-trade outlets have been suffering for several years in Belgium, with players trying to re-invent themselves. This has led to more and more pop-up stores and temporary events during special occasions. Such developments could provide manufacturers with the opportunity to remain relevant and try and recruit new consumers.

Mocktail Opportunities

Alcohol-free drinks are growing in Belgium because local consumers are trying to adopt more responsible consumption habits. However, they want beverages which look like alcoholic drinks to consume when relaxing or socialising with friends. This could herald an opportunity for manufacturers of RTDs/high-strength premixes to offer mocktails (cocktails without alcohol) to Belgian consumers. Indeed, the choice of mocktails is increasing in the on-trade, partly thanks

to the “Tournée Minérale” campaign. Therefore, it could be expected that the range of mocktails will also increase in the off-trade channel over the forecast period.

COMPETITIVE LANDSCAPE

Bacardi Martini Remains the Clear Category Leader

Thanks to its William Lawson Cola brand, Bacardi Martini remained the clear leader in RTDs/high-strength premixes in Belgium in 2017. However, the company is not investing in the category, preferring to focus on cocktails. For example, while Bacardi Mojito remained a major product in Bacardi’s portfolio, the manufacturer prefers to sell Bacardi Carta Blanca as a mojito ingredient rather than a ready-to-drink alternative. Thus, Bacardi Martini’s total volume share declined over the review period. Nevertheless, the company launched its mojito premix in a 25cl metal beverage can in 2017.

Category Suffers From A Lack of Innovation

The category’s ongoing decline can also be explained by a lack of innovation. Despite Belgian consumers being eager to try out new products, very few new launches were seen in the category in 2017. The most notable was Baileys Iced Coffee, albeit not targeted at traditional consumers of RTDs/high-strength premixes but instead purchasers of iced coffee, sales of which are growing quickly in the soft drinks market. Diageo’s aim is to create new consumption occasions and attract new consumers.

CATEGORY DATA

Table 50 Sales of RTDS/High-strength Premixes by Category: Total Volume 2012-2017

'000 litres	2012	2013	2014	2015	2016	2017
High-Strength Premixes	980.0	992.5	994.1	979.9	895.3	850.7
RTDs	3,863.1	3,901.6	3,932.3	3,895.2	3,686.7	3,543.3
- Malt-based RTDs	-	-	-	-	-	-
- Spirit-based RTDs	3,262.0	3,294.3	3,322.9	3,288.1	3,103.0	2,975.7
- Wine-based RTDs	601.2	607.3	609.5	607.1	583.6	567.7
- Other RTDs	-	-	-	-	-	-
RTDs/High-Strength Premixes	4,843.2	4,894.1	4,926.5	4,875.1	4,582.0	4,394.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 51 Sales of RTDS/High-strength Premixes by Category: Total Value 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
High-Strength Premixes	16.0	16.6	16.9	17.1	17.4	17.0
RTDs	35.6	36.0	36.3	36.4	36.3	35.9
- Malt-based RTDs	-	-	-	-	-	-
- Spirit-based RTDs	33.7	34.0	34.3	34.3	34.2	33.9
- Wine-based RTDs	1.9	2.0	2.0	2.0	2.0	2.0

- Other RTDs	-	-	-	-	-	-
RTDs/High-Strength Premixes	51.6	52.6	53.2	53.5	53.7	52.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 52 Sales of RTDS/High-strength Premixes by Category: % Total Volume Growth 2012-2017

% total volume growth	2016/17	2012-17 CAGR	2012/17 Total
High-Strength Premixes	-5.0	-2.8	-13.2
RTDs	-3.9	-1.7	-8.3
- Malt-based RTDs	-	-	-
- Spirit-based RTDs	-4.1	-1.8	-8.8
- Wine-based RTDs	-2.7	-1.1	-5.6
- Other RTDs	-	-	-
RTDs/High-Strength Premixes	-4.1	-1.9	-9.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 53 Sales of RTDS/High-strength Premixes by Category: % Total Value Growth 2012-2017

% local currency, current value growth	2016/17	2012-17 CAGR	2012/17 Total
High-Strength Premixes	-2.6	1.2	6.0
RTDs	-1.0	0.2	0.9
- Malt-based RTDs	-	-	-
- Spirit-based RTDs	-0.9	0.2	0.8
- Wine-based RTDs	-1.4	0.7	3.5
- Other RTDs	-	-	-
RTDs/High-Strength Premixes	-1.5	0.5	2.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54 Sales of RTDS/High-strength Premixes by Off-trade vs On-trade: Volume 2012-2017

'000 litres	2012	2013	2014	2015	2016	2017
Off-trade	3,708.6	3,799.3	3,874.6	3,873.2	3,647.8	3,500.7
On-trade	1,134.6	1,094.8	1,051.9	1,001.8	934.1	893.3
Total	4,843.2	4,894.1	4,926.5	4,875.1	4,582.0	4,394.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 55 Sales of RTDS/High-strength Premixes by Off-trade vs On-trade: Value 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
Off-trade	27.0	28.1	29.1	29.8	30.4	29.6
On-trade	24.7	24.5	24.1	23.6	23.3	23.3
Total	51.6	52.6	53.2	53.5	53.7	52.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 56 Sales of RTDS/High-strength Premixes by Off-trade vs On-trade: % Volume Growth 2012-2017

% volume growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	-4.0	-1.1	-5.6
On-trade	-4.4	-4.7	-21.3
Total	-4.1	-1.9	-9.3

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 57 Sales of RTDS/High-strength Premixes by Off-trade vs On-trade: % Value Growth 2012-2017

% constant value growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	-2.5	1.9	9.8
On-trade	-0.2	-1.1	-5.5
Total	-1.5	0.5	2.5

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 58 GBO Company Shares of RTDS/High-strength Premixes: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Bacardi & Co Ltd	41.4	41.2	39.6	39.6	40.1
Diageo Plc	23.6	21.8	22.4	19.6	19.5
J García Carrión SA	3.0	3.0	3.1	3.3	3.7
Bodegas y Bebidas SA (Grupo)	2.5	2.5	2.5	2.5	2.7
Brown-Forman Corp	-	-	1.3	1.3	1.4
La Martiniquaise SVS	0.8	0.8	0.7	0.7	0.7
Rémy Cointreau Group	0.9	0.9	0.9	0.9	0.7
Campari Milano SpA, Davide	0.0	0.1	0.1	0.2	0.2
Puerto Galero	0.6	0.6	0.4	0.2	-
Private Label	21.5	21.5	21.2	21.0	21.2
Others	5.6	7.6	7.9	10.9	9.9
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 NBO Company Shares of RTDS/High-strength Premixes: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Bacardi Martini Belgium SA	41.4	41.2	40.9	40.9	41.4
Diageo Belgium NV SA	23.6	21.8	22.4	19.7	19.5
Carrefour Belgium SA/NV	4.4	4.4	4.4	4.3	4.3
J García Carrión SA	3.0	3.0	3.1	3.3	3.7
Delhaize 'Le Lion' SA	3.7	3.7	3.6	3.6	3.6
Etn Franz Colruyt NV	3.5	3.5	3.5	3.4	3.4
Bodegas AGE SA	2.5	2.5	2.5	2.5	2.7
Maxxium Belgium NV SA	0.9	0.9	0.9	0.9	0.8
Bruggeman NV	0.8	0.8	0.7	0.7	0.7
MCS NV SA	0.0	0.1	0.1	0.2	0.2
Puerto Galero	0.6	0.6	0.4	0.2	-
Other Private Label	9.9	9.9	9.7	9.7	9.9
Others	5.6	7.6	7.8	10.8	9.8
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 60 LBN Brand Shares of RTDS/High-strength Premixes: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
William Lawson Cola (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	13.4	13.3	13.6	13.5
J&B Cola (Diageo Plc)	Diageo Belgium NV SA	9.2	9.3	8.1	8.0
Bacardi & Cola (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	7.7	7.4	7.5	7.4
Bacardi Mojito (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	4.1	4.1	4.0	4.9
Carrefour (Private Label)	Carrefour Belgium SA/NV	4.4	4.4	4.3	4.3
Gordon's & Tonic (Diageo Plc)	Diageo Belgium NV SA	3.3	3.9	4.1	4.3
Colruyt (Private Label)	Etn Franz Colruyt NV	3.5	3.5	3.4	3.4
Smirnoff Ice (Diageo Plc)	Diageo Belgium NV SA	4.3	4.0	3.0	2.7
Bacardi Breezer (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	3.9	2.7	2.7	2.6
Delhaize (Private Label)	Delhaize 'Le Lion' SA	2.6	2.6	2.6	2.6
Other Private Label (Private Label)	Other Private Label	9.9	9.7	9.7	9.9
Others	Others	33.6	35.3	37.2	36.3
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 61 Forecast Sales of RTDS/High-strength Premixes by Category: Total Volume 2017-2022

'000 litres	2017	2018	2019	2020	2021	2022
High-Strength Premixes	850.7	813.7	784.1	762.3	746.0	734.7
RTDs	3,543.3	3,456.2	3,389.5	3,340.5	3,299.9	3,262.6
- Malt-based RTDs	-	-	-	-	-	-
- Spirit-based RTDs	2,975.7	2,901.7	2,846.5	2,806.5	2,773.7	2,743.3
- Wine-based RTDs	567.7	554.5	542.9	534.0	526.2	519.3
- Other RTDs	-	-	-	-	-	-
RTDs/High-Strength Premixes	4,394.0	4,269.9	4,173.6	4,102.8	4,045.9	3,997.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 62 Forecast Sales of RTDS/High-strength Premixes by Category: Total Value 2017-2022

EUR million	2017	2018	2019	2020	2021	2022
High-Strength Premixes	17.0	16.3	15.8	15.4	15.1	14.9
RTDs	35.9	35.1	34.6	34.1	33.9	33.5
- Malt-based RTDs	-	-	-	-	-	-
- Spirit-based RTDs	33.9	33.1	32.6	32.2	32.0	31.7
- Wine-based RTDs	2.0	2.0	1.9	1.9	1.9	1.9
- Other RTDs	-	-	-	-	-	-
RTDs/High-Strength Premixes	52.9	51.4	50.3	49.5	49.0	48.5

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 63 Forecast Sales of RTDS/High-strength Premixes by Category: % Total Volume Growth 2017-2022

% total volume growth	2017/18	2017-22 CAGR	2017/22 Total
High-Strength Premixes	-4.3	-2.9	-13.6
RTDs	-2.5	-1.6	-7.9
- Malt-based RTDs	-	-	-
- Spirit-based RTDs	-2.5	-1.6	-7.8
- Wine-based RTDs	-2.3	-1.8	-8.5
- Other RTDs	-	-	-
RTDs/High-Strength Premixes	-2.8	-1.9	-9.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 64 Forecast Sales of RTDS/High-strength Premixes by Category: % Total Value Growth 2017-2022

% local currency, constant value growth

	2017/2018	2017-22 CAGR	2017/22 Total
High-Strength Premixes	-4.2	-2.6	-12.2
RTDs	-2.3	-1.4	-6.7
- Malt-based RTDs	-	-	-
- Spirit-based RTDs	-2.3	-1.4	-6.6
- Wine-based RTDs	-1.9	-1.5	-7.0
- Other RTDs	-	-	-
RTDs/High-Strength Premixes	-2.9	-1.7	-8.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SPIRITS IN BELGIUM - CATEGORY ANALYSIS

HEADLINES

- In 2017 total volume sales of spirits fall by 8% to 28 million litres
- Category heavily impacted by cross-border trade
- English gin the only category not to register a decline
- Average unit price rises by 4%
- Diageo remains the leading player with a 24% share of total volume sales
- Over the forecast period spirits is expected to post a total volume CAGR decline of 2% as sales fall to 25 million litres in 2022

PROSPECTS

Volume Sales Continue To Fall

After a very difficult 2016 due to a rise in excise duty at the end of 2015, the spirits category showed some signs of a recovery in 2017, albeit still registering a sharp decline. The main effect of the increase in excise duty was a significant rise in cross-border trade among both individuals and businesses. This practice continued in 2017, with volume sales of spirits expected to remain under pressure over the forecast period.

Despite the general downward trend, some categories, such as bitters and dark rum (particularly spiced rum), are expected to outperform the wider spirits category over the next few years. Aside from its rich taste and multiple consumption possibilities, every major spirits player is investing in dark and spiced rum, which is likely to result in further growth for the category over the forecast period.

Consumers Seek Premium and Lower Abv Drinks

Reinforced by the rise in excise duty, the trends towards premiumisation and lower ABV drinks strengthened in 2017. Indeed, as Belgians are looking to reduce their alcohol consumption, they are seeking higher quality products and/or opting for drinks with a lower ABV, with this reflected in the positive performance of spiced rum. This trading up trend could favour single malt Scotch whisky over the forecast period, which may replace blended Scotch. The trend towards lower ABV drinks or non alcoholic spirits is expected to gain ground over the forecast period. In 2017, Campari, the owner of the Crodino brand, an alcohol-free bitter, launched a new variant, Crodino Rosso, while Jet Import began to distribute Seedlip, an alcohol-free English gin.

the Buzz Surrounding Gin Starts To Weaken

After nearly a decade, the buzz surrounding English gin in Belgium is starting to weaken. This can be attributed to the fact that there are now too many players in the category, making it difficult for consumers to differentiate between products. In addition, the novelty effect is wearing off. However, as in other spirits categories, the premium segment in English gin is performing well. In this context, gin made in Belgium is in a good position to continue to benefit from the

craze for a few more years. Some players in the category have also launched pink gins, hoping to attract more women. Larios Rosé and Gordon's Pink were launched in Belgium at the end of 2017 and are likely to be joined by other brands in 2018, with this helping to support the category for a few more years.

COMPETITIVE LANDSCAPE

A Focus on the Premium Segment

Diageo continued to lead spirits in Belgium in 2017, although the British company is feeling the effects of the excise duty increase. Its mainstream spirits portfolio has been impacted by falling consumption and an increasing focus on premiumisation, with this generally also affecting other key players like Pernod Ricard, Bacardi Martini and Campari. Nevertheless, every player has a premium portfolio on which they focused their investment in 2017. Some are even extending their premium ranges, for example Bacardi Martini, which has launched Bacardi Gran Reserve 8 Años and Jack Daniel's Gentlemen Jack. The local manufacturer Filliers is also seeking to benefit from the premiumisation trend with its new Belgian whisky Goldlys 14YO Madeira Finish.

Price Promotions

Premiumisation continued to impact the spirits category in 2017, with the trend expected to further strengthen over the forecast period. Nevertheless, after the excise duty increase, large players, especially the leader Diageo, are following a price promotion strategy on mainstream spirits in order to limit the loss in volume sales. Therefore, discount coupons for spirits were commonplace in 2017. At the same time, some major brands entered Aldi and Lidl. This price promotion strategy forced the leading spirits manufacturers to cut costs in other areas such as advertising. In the meantime, smaller manufacturers like Bruggeman did not follow a price promotion strategy, with some even increasing their marketing budgets, leading to smaller brands such as Saint James gaining ground on larger ones.

A Need To Improve the Customer Experience

With many Belgians crossing the border to buy their alcohol, it is essential that Belgian supermarkets, supported by spirits manufacturers, improve the customer experience if they want to regain lost sales. Indeed, spirits shelves are not very attractive for the consumer. Pernod Ricard is one of the first spirits manufacturers in Belgium making an effort to improve consumers' in-store experience. The company has been involved in reorganising the alcoholic drinks aisles in a Delhaize supermarket and creating a "spirits island" in a Carrefour supermarket, with both these moves having proved successful. The common aim of spirits players over the forecast period is to split spirits into four categories, namely apéritifs, mixers and cocktails, "degustation" and digestifs.

CATEGORY BACKGROUND

Vodka, Gin, Other Blended Scotch Whisky, Dark Rum and White Rum Price Band Methodology

Classification for these spirits products is based purely on pricing, taking a typical brand, usually the leading brand by volume, as the benchmark price.

Summary 4 Benchmark Brands 2017

Category	Brand name	Positioning
Vodka	Smirnoff	Mid-priced
Gin	Gordon's	Mid-priced
Other blended Scotch whisky	Johnnie Walker Red Label	Mid-priced
Dark rum	Bacardi	Mid-priced
White rum	Bacardi	Mid-priced

Source: Euromonitor International from trade interviews, store checks

CATEGORY DATA

Table 65 Sales of Spirits by Category: Total Volume 2012-2017

'000 litres	2012	2013	2014	2015	2016	2017
Brandy and Cognac	1,605.0	1,542.6	1,488.7	1,438.7	1,077.4	929.1
- Brandy	585.7	545.4	512.0	485.6	351.4	296.3
- Cognac	1,019.2	997.2	976.8	953.1	726.0	632.8
Liqueurs	10,212.1	9,989.0	9,808.8	9,677.5	7,725.4	6,924.7
- Bitters	1,822.6	1,830.6	1,843.3	1,858.2	1,645.1	1,584.9
- Cream-based Liqueurs	2,323.0	2,221.3	2,146.5	2,082.1	1,568.8	1,323.6
- Other Liqueurs	6,066.5	5,937.1	5,819.0	5,737.2	4,511.5	4,016.3
Rum	3,184.9	3,229.6	3,222.7	3,200.9	2,711.9	2,519.3
- Dark Rum	723.6	760.2	767.1	773.5	708.0	679.5
- White Rum	2,461.3	2,469.4	2,455.6	2,427.3	2,003.9	1,839.8
Tequila (and Mezcal)	230.8	225.6	218.7	209.5	181.1	166.9
Whiskies	8,086.5	8,096.8	7,987.6	7,894.8	6,639.0	6,194.9
- Bourbon/Other US Whiskey	442.8	442.4	440.5	441.6	346.1	298.6
- Canadian Whisky	0.9	0.8	0.8	0.6	0.3	0.3
- Irish Whiskey	732.4	715.6	703.2	696.5	620.6	596.5
- Japanese Whisky	-	-	-	-	-	-
- Blended Scotch Whisky	5,780.1	5,782.0	5,689.3	5,603.6	4,622.0	4,277.9
- Single Grain Scotch Whisky	-	-	-	-	-	-
- Single Malt Scotch Whisky	1,130.3	1,155.9	1,153.8	1,152.5	1,050.0	1,021.6
- Other Whiskies	-	-	-	-	-	-
White Spirits	10,872.2	11,149.5	11,173.6	11,189.2	9,673.2	9,122.5
- Gin	6,174.0	6,429.4	6,614.3	6,735.3	5,972.9	5,745.9
- Vodka	4,698.2	4,720.1	4,559.2	4,453.9	3,700.3	3,376.6
Other Spirits	3,025.2	2,990.4	2,955.3	2,928.0	2,218.2	1,923.4
Spirits	37,216.7	37,223.4	36,855.4	36,538.5	30,226.2	27,780.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 66 Sales of Spirits by Category: Total Value 2012-2017

EUR million

	2012	2013	2014	2015	2016	2017
Brandy and Cognac	56.0	55.7	55.3	55.2	45.0	40.6
- Brandy	12.9	12.4	11.8	11.6	9.5	8.2
- Cognac	43.1	43.3	43.4	43.5	35.6	32.3
Liqueurs	252.8	255.6	255.9	262.3	232.2	215.5
- Bitters	35.0	37.0	38.3	40.9	41.4	41.4
- Cream-based Liqueurs	57.3	56.6	55.6	56.4	47.1	41.1
- Other Liqueurs	160.5	162.1	162.0	165.1	143.7	133.0
Rum	120.4	125.6	128.4	132.4	122.1	119.9
- Dark Rum	24.3	25.9	26.6	27.7	27.7	27.8
- White Rum	96.2	99.6	101.8	104.7	94.4	92.0
Tequila (and Mezcal)	8.0	8.1	8.1	8.2	7.7	7.5
Whiskies	367.8	379.5	385.4	393.7	368.4	358.3
- Bourbon/Other US Whiskey	16.3	16.8	17.3	18.0	16.3	15.0
- Canadian Whisky	0.0	0.0	0.0	0.0	0.0	0.0
- Irish Whiskey	35.2	35.7	36.0	37.0	37.0	36.6
- Japanese Whisky	-	-	-	-	-	-
- Blended Scotch Whisky	230.1	235.4	237.8	240.3	218.8	210.6
- Single Grain Scotch Whisky	-	-	-	-	-	-
- Single Malt Scotch Whisky	86.2	91.6	94.4	98.3	96.4	96.1
- Other Whiskies	-	-	-	-	-	-
White Spirits	272.7	292.1	304.8	322.5	319.5	311.2
- Gin	118.6	132.4	146.1	161.6	170.9	171.4
- Vodka	154.1	159.6	158.7	160.9	148.5	139.8
Other Spirits	74.2	75.2	75.8	76.6	62.9	55.8
Spirits	1,152.0	1,191.7	1,213.7	1,250.9	1,157.9	1,108.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 67 Sales of Spirits by Category: % Total Volume Growth 2012-2017

% total volume growth	2016/17	2012-17 CAGR	2012/17 Total
Brandy and Cognac	-13.8	-10.4	-42.1
- Brandy	-15.7	-12.7	-49.4
- Cognac	-12.8	-9.1	-37.9
Liqueurs	-10.4	-7.5	-32.2
- Bitters	-3.7	-2.8	-13.0
- Cream-based Liqueurs	-15.6	-10.6	-43.0
- Other Liqueurs	-11.0	-7.9	-33.8
Rum	-7.1	-4.6	-20.9
- Dark Rum	-4.0	-1.2	-6.1
- White Rum	-8.2	-5.7	-25.3
Tequila (and Mezcal)	-7.9	-6.3	-27.7
Whiskies	-6.7	-5.2	-23.4
- Bourbon/Other US Whiskey	-13.7	-7.6	-32.6
- Canadian Whisky	-12.9	-19.9	-67.0
- Irish Whiskey	-3.9	-4.0	-18.6
- Japanese Whisky	-	-	-
- Blended Scotch Whisky	-7.4	-5.8	-26.0
- Single Grain Scotch Whisky	-	-	-
- Single Malt Scotch Whisky	-2.7	-2.0	-9.6
- Other Whiskies	-	-	-
White Spirits	-5.7	-3.4	-16.1

- Gin	-3.8	-1.4	-6.9
- Vodka	-8.7	-6.4	-28.1
Other Spirits	-13.3	-8.7	-36.4
Spirits	-8.1	-5.7	-25.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 68 Sales of Spirits by Category: % Total Value Growth 2012-2017

% local currency, current value growth

	2016/17	2012-17 CAGR	2012/17 Total
Brandy and Cognac	-10.0	-6.3	-27.6
- Brandy	-13.4	-8.6	-36.3
- Cognac	-9.0	-5.6	-25.0
Liqueurs	-7.2	-3.1	-14.8
- Bitters	0.0	3.4	18.2
- Cream-based Liqueurs	-12.7	-6.4	-28.2
- Other Liqueurs	-7.5	-3.7	-17.2
Rum	-1.8	-0.1	-0.5
- Dark Rum	0.5	2.8	14.8
- White Rum	-2.5	-0.9	-4.3
Tequila (and Mezcal)	-3.7	-1.3	-6.2
Whiskies	-2.7	-0.5	-2.6
- Bourbon/Other US Whiskey	-8.1	-1.7	-8.4
- Canadian Whisky	-10.4	-15.8	-57.7
- Irish Whiskey	-0.9	0.8	4.1
- Japanese Whisky	-	-	-
- Blended Scotch Whisky	-3.7	-1.8	-8.5
- Single Grain Scotch Whisky	-	-	-
- Single Malt Scotch Whisky	-0.3	2.2	11.5
- Other Whiskies	-	-	-
White Spirits	-2.6	2.7	14.1
- Gin	0.3	7.6	44.5
- Vodka	-5.9	-1.9	-9.3
Other Spirits	-11.4	-5.6	-24.8
Spirits	-4.3	-0.8	-3.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 69 Sales of Spirits by Off-trade vs On-trade: Volume 2012-2017

'000 litres	2012	2013	2014	2015	2016	2017
Off-trade	29,483.5	29,513.5	29,244.3	29,024.8	23,832.0	21,791.3
On-trade	7,733.2	7,709.9	7,611.0	7,513.7	6,394.2	5,989.4
Total	37,216.7	37,223.4	36,855.4	36,538.5	30,226.2	27,780.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 Sales of Spirits by Off-trade vs On-trade: Value 2012-2017

EUR million

	2012	2013	2014	2015	2016	2017
Off-trade	561.8	581.2	591.3	612.9	580.5	547.6
On-trade	590.2	610.5	622.4	638.0	577.4	561.1
Total	1,152.0	1,191.7	1,213.7	1,250.9	1,157.9	1,108.7

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2012-2017

% volume growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	-8.6	-5.9	-26.1
On-trade	-6.3	-5.0	-22.5
Total	-8.1	-5.7	-25.4

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2012-2017

% constant value growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	-5.7	-0.5	-2.5
On-trade	-2.8	-1.0	-4.9
Total	-4.3	-0.8	-3.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 73 Sales of Dark Rum by Price Platform: % Total Volume 2012-2017

% total volume	2012	2013	2014	2015	2016	2017
Prestige	0.7	0.6	0.4	0.2	0.3	0.2
Ultra Premium	0.9	0.7	0.4	0.3	0.2	0.2
Super Premium	2.0	1.9	2.1	1.6	1.5	1.5
Premium	20.6	21.3	20.6	19.0	18.7	18.2
Standard	64.8	66.1	68.7	71.9	72.7	73.9
Economy	10.9	9.4	7.8	7.0	6.6	6.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: '-' indicates data not available

Table 74 Sales of White Rum by Price Platform: % Total Volume 2012-2017

% total volume	2012	2013	2014	2015	2016	2017
Prestige	0.4	0.4	0.4	0.4	0.4	0.4
Ultra Premium	0.5	0.5	0.5	0.5	0.3	0.3

Super Premium	0.8	0.9	0.9	0.8	0.5	0.5
Premium	3.2	3.2	3.2	3.2	2.4	2.2
Standard	82.7	82.5	82.6	82.8	83.9	84.4
Economy	12.5	12.5	12.3	12.2	12.4	12.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: '-' indicates data not available

Table 75 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2012-2017

% total volume	2012	2013	2014	2015	2016	2017
Prestige	0.0	0.0	0.1	0.1	0.2	0.3
Ultra Premium	0.0	0.0	0.2	0.2	0.2	0.2
Super Premium	1.0	1.0	1.3	1.1	1.3	1.6
Premium	8.4	9.0	10.1	10.1	11.4	11.9
Standard	79.9	80.0	78.5	79.0	77.6	76.5
Economy	10.6	9.9	9.8	9.5	9.4	9.4
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: '-' indicates data not available

Table 76 Sales of English Gin by Price Platform: % Total Volume 2012-2017

% total volume	2012	2013	2014	2015	2016	2017
Prestige	1.0	0.9	0.6	0.8	1.0	1.3
Ultra Premium	1.4	1.2	0.9	1.0	0.9	1.0
Super Premium	4.5	9.0	11.4	12.9	15.4	16.1
Premium	16.7	23.2	27.7	33.5	36.1	36.5
Standard	49.4	43.8	42.2	40.4	37.3	35.7
Economy	27.1	21.9	17.2	11.4	9.3	9.3
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: '-' indicates data not available

Table 77 Sales of Vodka by Price Platform: % Total Volume 2012-2017

% total volume	2012	2013	2014	2015	2016	2017
Prestige	0.3	0.3	0.2	0.1	0.2	0.3
Ultra Premium	0.4	0.4	0.2	0.2	0.2	0.2
Super Premium	0.9	1.8	3.8	5.0	5.8	6.6
Premium	19.9	17.9	17.4	17.5	16.6	16.4
Standard	62.1	64.2	64.0	63.6	62.4	62.0
Economy	16.4	15.4	14.4	13.6	14.8	14.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: '-' indicates data not available

Table 78 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2012-2017

% total volume	2012	2013	2014	2015	2016	2017
Flavoured Vodka	5.1	5.2	5.1	5.1	5.1	5.0
Non-Flavoured Vodka	94.9	94.8	94.9	94.9	94.9	95.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 79 GBO Company Shares of Spirits: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Diageo Plc	22.5	23.3	23.4	23.2	24.0
Bacardi & Co Ltd	10.4	11.0	11.9	13.1	13.3
Pernod Ricard Groupe	11.5	11.5	11.6	11.4	11.4
La Martiniquaise SVS	6.1	6.1	6.2	5.7	5.5
Campari Milano SpA, Davide	3.0	3.8	3.8	4.7	4.8
Rémy Cointreau Group	2.9	3.1	3.3	3.2	3.1
Lucas Bols BV	3.4	3.4	3.2	3.1	3.0
Filliers Graanstokerij NV	3.0	3.0	2.9	2.7	2.6
William Grant & Sons Ltd	1.4	1.6	1.7	2.2	2.4
Illva Saronno SpA	1.8	1.8	1.7	1.6	1.6
Mast-Jägermeister SE	0.9	0.9	0.9	1.0	1.1
Marie Brizard & Roger International SAS	-	-	0.8	0.8	0.8
Wenneker Distillery BV	1.1	1.0	1.0	0.8	0.8
Brown-Forman Corp	0.8	0.8	0.8	0.8	0.7
Domaine Mandarine Napoleon	0.7	0.7	0.7	0.7	0.7
Suntory Holdings Ltd	-	0.5	0.6	0.7	0.7
Distell Group Ltd	0.7	0.7	0.7	0.6	0.6
Mangaroca International SA	0.6	0.6	0.6	0.6	0.5
Russian Standard Corp	0.5	0.5	0.5	0.5	0.5
Edrington Group	0.5	0.5	0.4	0.4	0.4
LVMH Moët Hennessy Louis Vuitton SA	0.4	0.4	0.4	0.4	0.4
Diego Zamora SA	0.3	0.3	0.3	0.3	0.3
Branca Distillerie Srl, Flli	0.2	0.2	0.2	0.2	0.2
Alliance Global Group Inc	-	0.2	0.2	0.2	0.2
Socralvi SA	-	0.1	0.2	0.2	0.2
Grands Vins JC Boisset	0.2	0.1	0.2	0.2	0.1
Destilería Sierra Unidas SA de CV	0.1	0.1	0.1	0.1	0.1
Elephant Gin Ltd	-	0.0	0.1	0.1	0.1
Distillerie de Biercée SA	-	-	-	-	0.1
Grupo Cuervo SA de CV	0.0	0.0	0.1	0.1	0.1
Private Label	11.6	11.2	10.5	10.3	9.8

Others	15.4	12.4	11.3	10.0	9.6
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 80 NBO Company Shares of Spirits: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Diageo Belgium NV SA	22.5	23.4	23.5	23.3	24.1
Pernod Ricard Belgium	14.2	14.3	14.3	14.1	14.0
Bacardi Martini Belgium SA	11.0	11.6	12.5	13.6	13.8
Rémy Cointreau Belgium	9.8	10.0	9.9	10.0	10.0
Bruggeman NV	6.1	6.1	6.2	5.6	5.5
MCS NV SA	3.6	3.6	3.5	3.9	4.0
Filliers Graanstokerij NV	3.0	3.0	2.9	2.7	2.6
Etn Franz Colruyt NV	2.3	2.2	2.1	2.1	2.0
Cinoco SA	0.5	0.8	1.6	1.9	1.9
Delhaize 'Le Lion' SA	1.9	1.9	1.7	1.7	1.6
Carrefour Belgium SA/NV	1.6	1.7	1.7	1.6	1.6
Distillerie Smeets NV	1.1	1.0	1.0	0.8	0.8
Domaine Mandarine Napoleon	0.7	0.7	0.7	0.7	0.7
Mangaroca International SA	0.6	0.6	0.6	0.6	0.5
Fourcroy Renglet SA	0.5	0.5	0.5	0.5	0.5
LVMH Moët Hennessy Louis Vuitton SA	0.4	0.4	0.4	0.4	0.4
OSC AE	-	0.2	0.3	0.3	0.3
Branca Distillerie Srl, Flli	0.2	0.2	0.2	0.2	0.2
UB Group	0.1	0.2	0.2	0.2	0.2
Socralvi SA	-	0.1	0.2	0.2	0.2
Alcobrands Belux	0.2	0.2	0.2	0.2	0.2
Illva Saronno SpA	0.3	0.3	0.1	0.1	0.1
Brown-Forman Corp	0.2	0.2	0.1	0.1	0.1
Cristall Distillery	0.3	0.3	0.2	0.1	0.1
Promalvin SA	0.2	0.2	0.2	0.1	0.1
Brugal & Co	0.1	0.1	0.1	0.1	0.1
Armagnac Samalens	0.1	0.1	0.1	0.1	0.1
Ets Sempé	0.1	0.1	0.1	0.1	0.1
Château de Laubade	0.1	0.1	0.1	0.1	0.0
Gelas SA	0.1	0.1	0.0	-	-
Other Private Label	5.8	5.5	5.1	5.0	4.6
Others	12.4	10.5	9.9	9.5	9.5
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 81 LBN Brand Shares of Spirits: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
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Bacardi (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	4.0	4.0	4.0	4.1
Smirnoff (Diageo Plc)	Diageo Belgium NV SA	4.2	4.1	3.6	4.0
J&B Rare (Diageo Plc)	Diageo Belgium NV SA	4.3	3.9	3.7	3.8
Johnnie Walker Red Label (Diageo Plc)	Diageo Belgium NV SA	3.9	3.7	3.7	3.6
Gordon's (Diageo Plc)	Diageo Belgium NV SA	2.6	2.9	3.2	3.4
Peterman (La Martiniquaise SVS)	Bruggeman NV	4.0	3.9	3.3	3.2
Bombay Sapphire (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	1.7	1.9	2.5	2.6
William Lawson's (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	2.5	2.5	2.6	2.6
Picon (Diageo Plc)	Diageo Belgium NV SA	2.1	2.1	2.2	2.3
Ricard (Pernod Ricard Groupe)	Pernod Ricard Belgium	3.1	3.1	2.4	2.3
Other Private Label (Private Label)	Other Private Label	5.5	5.1	5.0	4.6
Others	Others	62.2	62.9	63.8	63.5
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 82 Forecast Sales of Spirits by Category: Total Volume 2017-2022

'000 litres	2017	2018	2019	2020	2021	2022
Brandy and Cognac	929.1	824.3	754.6	705.0	667.4	635.8
- Brandy	296.3	255.8	225.2	202.2	184.6	170.8
- Cognac	632.8	568.5	529.4	502.8	482.8	465.0
Liqueurs	6,924.7	6,489.3	6,206.8	5,996.0	5,827.8	5,696.3
- Bitters	1,584.9	1,580.2	1,587.3	1,597.7	1,614.6	1,635.3
- Cream-based Liqueurs	1,323.6	1,197.1	1,117.9	1,061.3	1,014.0	982.9
- Other Liqueurs	4,016.3	3,711.9	3,501.5	3,337.0	3,199.2	3,078.1
Rum	2,519.3	2,421.7	2,358.2	2,309.8	2,270.3	2,237.4
- Dark Rum	679.5	677.3	678.5	683.1	688.3	695.1
- White Rum	1,839.8	1,744.5	1,679.6	1,626.7	1,582.0	1,542.3
Tequila (and Mezcal)	166.9	160.7	158.2	156.6	155.2	154.5
Whiskies	6,194.9	6,004.8	5,869.1	5,812.1	5,798.1	5,804.4
- Bourbon/Other US Whiskey	298.6	273.7	260.2	252.9	248.8	245.1
- Canadian Whisky	0.3	-	-	-	-	-
- Irish Whiskey	596.5	586.3	583.5	582.6	582.2	582.8
- Japanese Whisky	-	-	-	-	-	-
- Blended Scotch Whisky	4,277.9	4,126.2	4,005.9	3,954.5	3,941.3	3,943.5
- Single Grain Scotch Whisky	-	-	-	-	-	-
- Single Malt Scotch Whisky	1,021.6	1,018.5	1,019.5	1,022.2	1,025.8	1,033.1
- Other Whiskies	-	-	-	-	-	-
White Spirits	9,122.5	8,872.8	8,783.4	8,772.1	8,815.4	8,867.4
- Gin	5,745.9	5,624.7	5,587.9	5,572.5	5,558.0	5,540.7
- Vodka	3,376.6	3,248.1	3,195.5	3,199.6	3,257.4	3,326.7
Other Spirits	1,923.4	1,816.8	1,774.2	1,762.5	1,761.9	1,764.9
Spirits	27,780.8	26,590.2	25,904.4	25,514.1	25,296.1	25,160.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 83 Forecast Sales of Spirits by Category: Total Value 2017-2022

EUR million	2017	2018	2019	2020	2021	2022
Brandy and Cognac	40.6	36.6	34.0	32.2	30.8	29.7
- Brandy	8.2	7.1	6.3	5.7	5.2	4.8
- Cognac	32.3	29.4	27.7	26.5	25.6	24.8
Liqueurs	215.5	204.6	197.5	191.5	186.7	183.4
- Bitters	41.4	41.8	42.4	43.1	43.7	44.6
- Cream-based Liqueurs	41.1	38.0	36.1	34.5	33.2	32.6
- Other Liqueurs	133.0	124.8	119.0	113.9	109.7	106.2
Rum	119.9	117.9	116.4	115.4	104.8	103.3
- Dark Rum	27.8	27.9	27.9	28.2	18.8	18.3
- White Rum	92.0	90.0	88.4	87.2	86.0	85.0
Tequila (and Mezcal)	7.5	7.3	7.3	7.3	7.3	7.4
Whiskies	358.3	352.5	350.0	350.3	352.1	354.9
- Bourbon/Other US Whiskey	15.0	14.1	13.7	13.4	13.3	13.2
- Canadian Whisky	0.0	-	-	-	-	-
- Irish Whiskey	36.6	36.3	36.4	36.5	36.5	36.7
- Japanese Whisky	-	-	-	-	-	-
- Blended Scotch Whisky	210.6	204.6	200.4	199.0	198.9	199.1
- Single Grain Scotch Whisky	-	-	-	-	-	-
- Single Malt Scotch Whisky	96.1	97.4	99.4	101.4	103.4	105.9
- Other Whiskies	-	-	-	-	-	-
White Spirits	311.2	305.7	304.4	304.1	305.0	305.6
- Gin	171.4	170.0	169.9	169.7	169.3	168.4
- Vodka	139.8	135.7	134.5	134.4	135.7	137.2
Other Spirits	55.8	52.6	51.5	51.1	51.0	51.0
Spirits	1,108.7	1,077.1	1,061.1	1,051.9	1,037.7	1,035.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 84 Forecast Sales of Spirits by Category: % Total Volume Growth 2017-2022

% total volume growth	2017/18	2017-22 CAGR	2017/22 Total
Brandy and Cognac	-11.3	-7.3	-31.6
- Brandy	-13.7	-10.4	-42.3
- Cognac	-10.2	-6.0	-26.5
Liqueurs	-6.3	-3.8	-17.7
- Bitters	-0.3	0.6	3.2
- Cream-based Liqueurs	-9.6	-5.8	-25.7
- Other Liqueurs	-7.6	-5.2	-23.4
Rum	-3.9	-2.3	-11.2
- Dark Rum	-0.3	0.5	2.3
- White Rum	-5.2	-3.5	-16.2
Tequila (and Mezcal)	-3.7	-1.5	-7.4
Whiskies	-3.1	-1.3	-6.3
- Bourbon/Other US Whiskey	-8.3	-3.9	-17.9
- Canadian Whisky	-	-	-
- Irish Whiskey	-1.7	-0.5	-2.3

- Japanese Whisky	-	-	-
- Blended Scotch Whisky	-3.5	-1.6	-7.8
- Single Grain Scotch Whisky	-	-	-
- Single Malt Scotch Whisky	-0.3	0.2	1.1
- Other Whiskies	-	-	-
White Spirits	-2.7	-0.6	-2.8
- Gin	-2.1	-0.7	-3.6
- Vodka	-3.8	-0.3	-1.5
Other Spirits	-5.5	-1.7	-8.2
Spirits	-4.3	-2.0	-9.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 85 Forecast Sales of Spirits by Category: % Total Value Growth 2017-2022

% local currency, constant value growth

	2017/2018	2017-22 CAGR	2017/22 Total
Brandy and Cognac	-9.8	-6.1	-26.8
- Brandy	-13.2	-10.0	-41.1
- Cognac	-8.9	-5.1	-23.2
Liqueurs	-5.1	-3.2	-14.9
- Bitters	0.9	1.5	7.7
- Cream-based Liqueurs	-7.6	-4.6	-20.8
- Other Liqueurs	-6.1	-4.4	-20.1
Rum	-1.7	-2.9	-13.8
- Dark Rum	0.2	-8.0	-34.2
- White Rum	-2.2	-1.6	-7.6
Tequila (and Mezcal)	-2.1	-0.3	-1.3
Whiskies	-1.6	-0.2	-0.9
- Bourbon/Other US Whiskey	-5.5	-2.5	-11.8
- Canadian Whisky	-	-	-
- Irish Whiskey	-0.8	0.0	0.2
- Japanese Whisky	-	-	-
- Blended Scotch Whisky	-2.9	-1.1	-5.5
- Single Grain Scotch Whisky	-	-	-
- Single Malt Scotch Whisky	1.4	2.0	10.3
- Other Whiskies	-	-	-
White Spirits	-1.8	-0.4	-1.8
- Gin	-0.9	-0.4	-1.8
- Vodka	-2.9	-0.4	-1.8
Other Spirits	-5.7	-1.8	-8.5
Spirits	-2.8	-1.4	-6.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

WINE IN BELGIUM - CATEGORY ANALYSIS

HEADLINES

- In 2017 wine declines by 3% in total volume terms to stand at sales of 277 million litres
- Competition from other alcoholic drinks remains the biggest threat to wine
- Still rosé wine the best performer with total volume growth of 1%
- Premiumisation drives up average unit price in 2017
- Competitive landscape remains very fragmented, with private label accounting for the greatest share of sales
- Over the forecast period wine will remain flat in total volume terms

PROSPECTS

Wine Suffers A Further Total Volume Decline in 2017

Wine recorded a total volume decline for the second consecutive year in 2017. Although wine drinkers are seen as being more loyal to their preferred alcoholic drink than consumers in other categories, wine suffered from the increase in excise tax and the premiumisation trend, with competition from other alcoholic drinks set to be the biggest threat to wine over the forecast period. For example, while beer, particularly craft beer and ale, are increasingly replacing still wine with meals, younger generations are also looking to discover new alcoholic drinks. At the same time, while fortified wine has been less affected by the excise increase in Belgium, sparkling wine is expected to suffer over the forecast period from a reduction in tax on sparkling wine in the Netherlands, which will likely support cross-border trade.

Price Polarisation Seen in Sparkling Wine

Sparkling wine remained a category under pressure in 2017. However, some price segments recorded an increase in sales. Indeed, with pressure stronger on the mid-priced segment, standard champagne and cava, which have performed well in recent years, suffered the most. On the contrary, premium champagnes are growing. In addition, prosecco continued to perform relatively well and gain share. Thus, it can be said that the category is currently witnessing price polarisation. This is expected to strengthen in the future as premium champagne will replace standard champagne for special occasions and good value-for-money other sparkling wine will replace standard champagne for normal occasions.

Still Rosé Wine Gains Share

The majority of the still wine consumed in Belgium continued to be red wine. Nevertheless, still red wine is losing share to rosé, which appeals to younger generations thanks to its sweeter and softer taste. Still rosé wine can also be paired with spicy food, which is a current trend in Belgium. One interesting fact is that Belgians like very clear, nearly white, still rosé wine. Nevertheless, as the consumption of still rosé wine is rising, it is expected that, with the support of the media, more “knowledgeable” consumers will turn to darker coloured still rosé wines over

the forecast period. In addition, bag in box packaging is becoming more popular in still rosé wine due to being convenient to store.

COMPETITIVE LANDSCAPE

Wine Fairs

For retailers, wine fairs have become a way to reward loyal customers and attract new ones. Indeed, while wine fairs has been a strategy used for a long time by conventional retailers, recent years have also seen hard discounters adopt this concept to attract new customers. Conventional retailers have replied with even bigger promotions. As such, wine fairs are now a tradition in Belgium, offering ever bigger price discounts over a longer period of time. It is now possible to find a wine fair at almost any time of the year in Belgium.

Fortified Wine and Vermouth Requires An Image Update

Volume sales of fortified wine and vermouth have been declining for many years in Belgium. The main reason for this is the category's old-fashioned image. Aware of the problem, manufacturers are working on updating it. In 2017, vermouth registered a much better performance, benefiting from the activities of the category's main player, Martini. While this better performance was down to new mixes like vermouth-cocktail and vermouth-tonic and is expected to last over the short term, it is not expected to be a long-term trend due to the limited number of players in the category and its relatively low profit margins. Port, meanwhile, thanks to Diageo and its Cruz brand, is starting to benefit from a new image. Indeed, 2017 was the 130th birthday of the brand, with Diageo having adopted a premiumisation and diversification strategy, offering both white and pink port.

Belgian Production

Although a very small country, Belgium is witnessing a constant increase in wine production, particularly of sparkling wine, with well-known brands including Ruffus and Domaine du Ry d'Argent, but also still red wine thanks to producers like Domaine de Chenoy. With small quantities and relatively low productivity, Belgian wine is a niche but is expected to continue to develop over the forecast period. Other wine categories are also emerging. For instance, Belmouth, a Belgian vermouth, was launched in 2016 via a partnership between Delhaize, Distillerie de Biercée and Domaine du Ry d'Argent.

CATEGORY DATA

Table 86 Sales of Wine by Category: Total Volume 2012-2017

million litres	2012	2013	2014	2015	2016	2017
Fortified Wine and Vermouth	20.1	19.6	19.3	19.0	17.7	17.4
- Port	9.7	9.5	9.3	9.2	8.6	8.3
- Sherry	1.5	1.4	1.3	1.2	1.1	1.0
- Vermouth	8.9	8.8	8.6	8.6	8.1	8.1
- Other Fortified Wine	-	-	-	-	-	-
Non-Grape Wine	0.2	0.2	0.2	0.1	0.1	0.0
- Fruit Wine	0.2	0.2	0.2	0.1	0.1	0.0

Sparkling Wine	27.0	29.0	31.5	33.7	32.3	31.9
- Champagne	5.8	5.9	6.2	6.3	5.9	5.9
- Other Sparkling Wine	21.2	23.2	25.3	27.5	26.4	26.0
Still Light Grape Wine	249.5	247.6	247.6	246.5	233.9	227.5
- Still Red Wine	128.4	125.4	123.5	121.7	114.1	109.6
- Still Rosé Wine	40.0	40.2	41.0	40.9	39.6	40.0
- Still White Wine	81.1	82.0	83.1	83.8	80.1	77.9
Wine	296.8	296.5	298.5	299.4	283.9	276.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 87 Sales of Wine by Category: Total Value 2012-2017

EUR million	2012	2013	2014	2015	2016	2017
Fortified Wine and Vermouth	195.7	195.4	195.0	197.8	199.8	198.8
- Port	102.8	102.4	101.8	102.6	102.5	100.2
- Sherry	13.9	13.2	12.6	12.4	12.0	11.2
- Vermouth	79.0	79.8	80.6	82.8	85.3	87.3
- Other Fortified Wine	-	-	-	-	-	-
Non-Grape Wine	1.0	1.0	0.9	0.8	0.5	0.4
- Fruit Wine	1.0	1.0	0.9	0.8	0.5	0.4
Sparkling Wine	477.5	510.3	568.6	618.1	656.7	664.8
- Champagne	248.2	258.0	291.5	305.8	317.0	325.1
- Other Sparkling Wine	229.3	252.2	277.1	312.2	339.8	339.7
Still Light Grape Wine	1,979.5	1,988.2	2,011.6	2,038.6	2,049.3	2,026.1
- Still Red Wine	1,138.4	1,133.3	1,134.0	1,141.4	1,126.2	1,102.6
- Still Rosé Wine	235.0	238.8	249.3	250.7	260.4	267.2
- Still White Wine	606.1	616.1	628.2	646.5	662.7	656.3
Wine	2,653.7	2,694.9	2,776.1	2,855.2	2,906.3	2,890.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 88 Sales of Wine by Category: % Total Volume Growth 2012-2017

% total volume growth	2016/17	2012-17 CAGR	2012/17 Total
Fortified Wine and Vermouth	-2.0	-2.8	-13.5
- Port	-3.2	-3.0	-14.3
- Sherry	-7.8	-7.6	-32.6
- Vermouth	0.1	-1.9	-9.4
- Other Fortified Wine	-	-	-
Non-Grape Wine	-48.8	-30.0	-83.2
- Fruit Wine	-48.8	-30.0	-83.2
Sparkling Wine	-1.2	3.4	17.9
- Champagne	0.0	0.4	1.9
- Other Sparkling Wine	-1.5	4.1	22.3
Still Light Grape Wine	-2.7	-1.8	-8.8
- Still Red Wine	-4.0	-3.1	-14.6
- Still Rosé Wine	1.0	0.0	0.0
- Still White Wine	-2.8	-0.8	-4.0
Wine	-2.5	-1.4	-6.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 89 Sales of Wine by Category: % Total Value Growth 2012-2017

% local currency, current value growth

	2016/17	2012-17 CAGR	2012/17 Total
Fortified Wine and Vermouth	-0.5	0.3	1.6
- Port	-2.2	-0.5	-2.5
- Sherry	-6.2	-4.1	-18.9
- Vermouth	2.3	2.0	10.5
- Other Fortified Wine	-	-	-
Non-Grape Wine	-33.1	-18.7	-64.5
- Fruit Wine	-33.1	-18.7	-64.5
Sparkling Wine	1.2	6.8	39.2
- Champagne	2.6	5.5	31.0
- Other Sparkling Wine	0.0	8.2	48.1
Still Light Grape Wine	-1.1	0.5	2.4
- Still Red Wine	-2.1	-0.6	-3.1
- Still Rosé Wine	2.6	2.6	13.7
- Still White Wine	-1.0	1.6	8.3
Wine	-0.6	1.7	8.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 90 Sales of Wine by Off-trade vs On-trade: Volume 2012-2017

million litres

	2012	2013	2014	2015	2016	2017
Off-trade	223.6	224.2	226.2	228.1	215.9	210.6
On-trade	73.2	72.3	72.3	71.3	68.0	66.2
Total	296.8	296.5	298.5	299.4	283.9	276.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 91 Sales of Wine by Off-trade vs On-trade: Value 2012-2017

EUR million

	2012	2013	2014	2015	2016	2017
Off-trade	1,198.9	1,232.8	1,274.2	1,334.2	1,401.1	1,393.7
On-trade	1,454.8	1,462.1	1,501.9	1,521.0	1,505.3	1,496.3
Total	2,653.7	2,694.9	2,776.1	2,855.2	2,906.3	2,890.1

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 92 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2012-2017

% volume growth

	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	-2.5	-1.2	-5.8

On-trade	-2.6	-2.0	-9.6
Total	-2.5	-1.4	-6.8

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 93 Sales of Wine by Off-trade vs On-trade: % Value Growth 2012-2017

% constant value growth	2016/17	2012-17 CAGR	2012/17 Total
Off-trade	-0.5	3.1	16.2
On-trade	-0.6	0.6	2.9
Total	-0.6	1.7	8.9

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 94 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2012-2017

% off-trade	2012	2013	2014	2015	2016	2017
Under EUR3	29.0	29.0	29.0	29.0	29.0	28.1
EUR3.01 to EUR4.5	30.0	30.4	30.3	30.3	30.5	30.1
EUR4.51 to EUR6	29.6	29.6	29.6	29.6	29.6	30.0
EUR6.01 to EUR7.5	8.8	8.7	8.7	8.8	8.7	9.0
EUR7.51 to EUR12.5	2.0	1.9	1.9	2.0	1.8	2.0
EUR12.51 and above	0.6	0.4	0.4	0.4	0.4	0.8
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 95 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2012-2017

% off-trade	2012	2013	2014	2015	2016	2017
Under EUR3	28.3	28.3	28.5	28.8	28.9	28.3
EUR3.01 to EUR3.99	30.0	30.3	30.0	29.6	29.7	29.8
EUR4 to EUR4.99	29.7	29.8	29.8	29.7	29.7	29.8
EUR5 to EUR7.49	10.0	9.8	9.8	9.9	9.7	10.0
EUR7.5 and above	2.0	2.0	2.0	2.1	2.0	2.1
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 96 Sales of Still White Wine by Price Segment: % Off-trade Volume 2012-2017

% off-trade	2012	2013	2014	2015	2016	2017
Under EUR3	26.0	26.1	26.0	26.1	26.0	25.5
EUR3.01 to EUR3.99	30.4	30.3	30.6	31.0	31.3	31.3
EUR4 to EUR4.99	30.5	30.4	30.6	30.8	30.8	31.0

EUR5 to EUR7.49	9.8	9.8	9.6	9.4	9.4	9.6
EUR7.5 to EUR12.49	3.0	3.1	2.8	2.5	2.4	2.5
EUR125 and above	0.3	0.4	0.3	0.2	0.1	0.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 97 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2012-2017

% off-trade	2012	2013	2014	2015	2016	2017
Under EUR4.99	25.9	26.1	26.3	26.6	26.8	25.2
EUR5 to EUR6.49	24.4	24.6	24.8	24.8	25.0	25.5
EUR6.5 to EUR7.99	27.7	27.6	27.5	27.4	27.5	28.0
EUR8 to EUR9.99	15.5	15.3	15.3	15.1	15.0	15.3
EUR10 and above	6.5	6.3	6.2	6.0	5.8	6.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 98 GBO Company Shares of Still Light Grape Wine: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Viña Concha y Toro SA	1.1	1.1	1.1	1.2	1.2
Pernod Ricard Groupe	0.5	0.5	0.9	0.8	0.8
Treasury Wine Estates Ltd	0.5	0.5	0.5	0.6	0.6
Viña Santa Rita SA	0.4	0.4	0.4	0.4	0.4
Sogrape Group	0.3	0.3	0.3	0.4	0.4
Accolade Wines Ltd	0.4	0.4	0.4	0.4	0.4
Castel Groupe	-	-	-	-	0.3
KWV Group	0.3	0.3	0.3	0.3	0.3
Grands Chais de France SA, Les	0.3	0.3	0.3	0.2	0.2
Codorníu SA	0.2	0.2	0.2	0.2	0.2
Union des Vignerons des Côtes du Rhône SCA	0.2	0.2	0.2	0.2	0.2
E&J Gallo Winery Inc	0.1	0.1	0.1	0.1	0.1
Baron Philippe de Rothschild SA	0.2	0.2	0.2	0.1	0.1
Listel SAS	-	0.3	0.3	0.3	-
Vranken-Pommery Monopole SA	0.3	-	-	-	-
Foster's Group Ltd	-	-	-	-	-
Constellation Brands Inc	-	-	-	-	-
Private Label	50.0	49.9	50.3	51.4	51.5
Others	45.2	45.3	44.5	43.4	43.2
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 99 NBO Company Shares of Still Light Grape Wine: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Etn Franz Colruyt NV	10.2	10.1	10.4	10.6	10.6
Delhaize 'Le Lion' SA	10.3	10.3	10.3	10.2	10.2
Carrefour Belgium SA/NV	9.2	9.2	9.3	9.7	9.7
Lidl België GmbH & Co KG	7.0	7.1	7.1	7.5	7.6
Aldi NV/SA	6.6	6.6	6.7	6.8	6.8
Viña Concha y Toro SA	1.1	1.1	1.1	1.2	1.2
Pernod Ricard Belgium	0.8	0.8	1.1	1.1	1.1
Southcorp Holdings Ltd	0.5	0.5	0.5	0.6	0.6
Santa Rita	0.4	0.4	0.4	0.4	0.4
Bacardi Martini Belgium SA	0.3	0.3	0.3	0.4	0.4
Constellation Europe Ltd	0.4	0.4	0.4	0.4	0.4
Listel SAS	-	0.3	0.3	0.3	0.3
Grands Chais de France SA, Les	0.3	0.3	0.3	0.2	0.2
Codorníu SA	0.2	0.2	0.2	0.2	0.2
Union des Vignerons des Côtes du Rhône SCA	0.2	0.2	0.2	0.2	0.2
Maxxium Belgium NV SA	0.1	0.1	0.1	0.1	0.1
Baron Philippe de Rothschild SA	0.2	0.2	0.2	0.1	0.1
Domaines Listel SA	0.3	-	-	-	-
Other Private Label	6.6	6.5	6.5	6.5	6.5
Others	45.2	45.3	44.5	43.4	43.2
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 100 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
Colruyt (Private Label)	Etn Franz Colruyt NV	10.1	10.4	10.6	10.6
Delhaize (Private Label)	Delhaize 'Le Lion' SA	10.3	10.3	10.2	10.2
Carrefour (Private Label)	Carrefour Belgium SA/NV	9.2	9.3	9.7	9.7
Lidl (Private Label)	Lidl België GmbH & Co KG	7.1	7.1	7.5	7.6
Aldi (Private Label)	Aldi NV/SA	6.6	6.7	6.8	6.8
Jacob's Creek (Pernod Ricard Groupe)	Pernod Ricard Belgium	0.5	0.9	0.8	0.8
Lindeman's (Treasury Wine Estates Ltd)	Southcorp Holdings Ltd	0.4	0.4	0.4	0.4
Concha y Toro Maipo	Viña Concha y Toro SA	0.4	0.4	0.4	0.4
Concha y Toro Cono Sur	Viña Concha y Toro SA	0.4	0.4	0.4	0.4
Mateus (Sogrape Group)	Bacardi Martini Belgium SA	0.3	0.3	0.4	0.4
Other Private Label (Private Label)	Other Private Label	6.5	6.5	6.5	6.5

Others	Others	48.1	47.3	46.3	46.1
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 101 GBO Company Shares of Champagne: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Vranken-Pommery Monopole SA	14.0	13.5	15.7	16.7	16.4
Européenne de Participations Industrielles (EPI) SAS	10.6	10.2	10.3	10.8	11.9
LVMH Moët Hennessy Louis Vuitton SA	11.0	10.7	10.8	11.4	11.4
Groupe Laurent-Perrier	9.4	9.1	9.2	9.8	9.9
Pernod Ricard Groupe	3.2	3.1	3.7	4.6	4.8
Champagne Taittinger	4.3	4.1	4.3	4.6	4.5
GH Martel & Co, Le Groupe	2.5	2.5	2.4	2.7	2.7
Champagne Duval Leroy SA	2.5	2.5	2.5	2.6	2.5
Nicolas Feuillatte	1.5	1.4	1.4	1.4	1.4
Champagne Louis Roederer (CLR) SA	1.2	1.1	1.1	1.1	1.1
Champagne Alain Thienot SAS	1.2	1.2	1.1	1.1	1.1
Champagne Henri Mandois SA	1.0	0.9	0.9	0.9	0.9
Champagne Cattier	0.6	0.6	0.6	0.6	0.6
Rémy Cointreau Group	-	-	-	-	-
Private Label	14.4	13.7	13.7	17.2	17.3
Others	22.5	25.4	22.1	14.5	13.4
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 102 NBO Company Shares of Champagne: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Vranken-Pommery Monopole SA	14.0	13.5	15.7	16.7	16.4
Bacardi Martini Belgium SA	-	-	-	10.8	11.9
LVMH Moët Hennessy Louis Vuitton SA	10.3	10.0	10.2	10.8	10.9
Groupe Laurent-Perrier	9.4	9.1	9.2	9.8	9.9
MCS NV SA	3.2	3.1	3.7	4.6	4.8
Champagne Taittinger	4.3	4.1	4.3	4.6	4.5
Etn Franz Colruyt NV	3.8	3.6	3.5	3.9	4.0
Delhaize 'Le Lion' SA	1.3	1.2	1.2	3.5	3.4
Carrefour Belgium SA/NV	3.1	2.9	2.9	3.1	3.1
GH Martel & Co, Le Groupe	2.5	2.5	2.4	2.7	2.7
Champagne Duval Leroy SA	2.5	2.5	2.5	2.6	2.5
Nicolas Feuillatte	1.5	1.4	1.4	1.4	1.4

Champagne Louis Roederer (CLR) SA	1.2	1.1	1.1	1.1	1.1
Champagne Alain Thienot SAS	1.2	1.2	1.1	1.1	1.1
Champagne Henri Mandois SA	1.0	0.9	0.9	0.9	0.9
Champagne Cattier	0.6	0.6	0.6	0.6	0.6
Ruinart Belux SA	0.7	0.6	0.6	0.6	0.5
Maxxium Belgium NV SA	10.6	10.2	10.3	-	-
Other Private Label	6.3	6.0	6.1	6.7	6.7
Others	22.5	25.4	22.1	14.5	13.4
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 103 LBN Brand Shares of Champagne: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
Vranken	Vranken-Pommery Monopole SA	10.0	12.1	12.9	12.7
Piper Heidsieck (Européenne de Participations Industrielles (EPI) SAS)	Bacardi Martini Belgium SA	-	-	10.8	11.9
Laurent-Perrier Moët & Chandon	Groupe Laurent-Perrier LVMH Moët Hennessy Louis Vuitton SA	9.1	9.2	9.8	9.9
Taittinger	Champagne Taittinger	4.1	4.3	4.6	4.5
Colruyt (Private Label)	Etn Franz Colruyt NV	3.6	3.5	3.9	4.0
Pommery	Vranken-Pommery Monopole SA	3.6	3.6	3.7	3.7
Mumm (Pernod Ricard Groupe)	MCS NV SA	2.7	2.8	3.4	3.5
Delhaize (Private Label)	Delhaize 'Le Lion' SA	1.2	1.2	3.5	3.4
Carrefour (Private Label)	Carrefour Belgium SA/NV	2.9	2.9	3.1	3.1
Piper Heidsieck (Européenne de Participations Industrielles (EPI) SAS)	Maxxium Belgium NV SA	10.2	10.3	-	-
Other Private Label (Private Label)	Other Private Label	6.0	6.1	6.7	6.7
Others	Others	38.1	35.5	28.5	27.3
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 104 GBO Company Shares of Other Sparkling Wine: % Total Volume 2013-2017

% total volume

Company	2013	2014	2015	2016	2017
Bacardi & Co Ltd	13.6	13.3	13.0	13.3	13.6
Codorníu SA	10.2	10.2	12.3	13.0	13.1
Freixenet SA	8.0	8.1	10.5	12.0	12.2
Campari Milano SpA, Davide	4.2	4.3	4.5	4.8	5.0
Pernod Ricard Groupe	3.3	3.1	3.0	3.2	3.1
Sektkellerei Schloss Wachenheim AG	1.6	1.5	1.4	1.6	1.6
Ackerman Rémy Pannier	1.8	1.7	1.6	1.6	1.6
Caves Bernard Massard SA	1.9	1.7	1.6	1.6	1.6
Etablissements Fourcroy SA	1.8	1.7	1.6	1.6	1.5
Aimery Sieur d'Arques SA	1.6	1.5	1.4	1.5	1.4
Jaillance SA	1.7	1.6	1.5	1.4	1.2
Private Label	27.6	26.4	26.9	27.9	27.9
Others	22.5	25.0	20.6	16.8	16.1
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 105 NBO Company Shares of Other Sparkling Wine: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Bacardi Martini Belgium SA	15.2	14.8	14.4	14.8	15.3
Codorníu SA	10.2	10.2	12.3	13.0	13.1
Freixenet SA	8.0	8.1	10.5	12.0	12.2
Etn Franz Colruyt NV	4.9	4.7	4.9	5.2	5.2
MCS NV SA	4.2	4.3	4.5	4.8	5.0
Delhaize 'Le Lion' SA	4.2	4.0	4.2	4.4	4.4
Carrefour Belgium SA/NV	3.5	3.4	3.5	3.6	3.5
Pernod Ricard Belgium	3.3	3.1	3.0	3.2	3.1
Ackerman Rémy Pannier	1.8	1.7	1.6	1.6	1.6
Fourcroy Renglet SA	1.9	1.7	1.6	1.6	1.6
Etablissements Fourcroy SA	1.8	1.7	1.6	1.6	1.5
Aimery Sieur d'Arques SA	1.6	1.5	1.4	1.5	1.4
Jaillance SA	1.7	1.6	1.5	1.4	1.2
Other Private Label	15.0	14.3	14.3	14.7	14.8
Others	22.5	25.0	20.6	16.8	16.1
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 106 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
Freixenet	Freixenet SA	8.1	8.0	8.7	8.7
Codorníu	Codorníu SA	4.9	7.0	7.3	7.3
Martini Brut	Bacardi Martini Belgium	5.9	5.6	5.4	5.5

(Bacardi & Co Ltd)	SA				
Colruyt (Private Label)	Etn Franz Colruyt NV	4.7	4.9	5.2	5.2
Riccadonna Prosecco (Campari Milano SpA, Davide)	MCS NV SA	4.3	4.5	4.8	5.0
Delhaize (Private Label)	Delhaize 'Le Lion' SA	4.0	4.2	4.4	4.4
Carrefour (Private Label)	Carrefour Belgium SA/NV	3.4	3.5	3.6	3.5
Mia Moscato	Freixenet SA	-	2.5	3.3	3.5
Jacob's Creek (Pernod Ricard Groupe)	Pernod Ricard Belgium SA	1.4	1.5	1.8	1.8
Veuve Amiot (Sektellerei Schloss Wachenheim AG)	Bacardi Martini Belgium SA	1.5	1.4	1.6	1.6
Other Private Label (Private Label)	Other Private Label	14.3	14.3	14.7	14.8
Others	Others	47.5	42.6	39.3	38.6
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 107 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Bacardi & Co Ltd	28.6	29.1	29.3	29.3	29.4
Sogrape Group	11.5	10.3	11.2	11.2	10.8
Symington Family Estates	6.4	7.6	9.6	10.5	10.6
La Martiniquaise SVS	6.5	8.1	6.4	6.0	6.6
Grupo Osborne SA	4.5	4.5	4.3	4.5	4.4
Pernod Ricard Groupe	1.8	1.7	2.5	3.0	3.2
Familli Gancia & CSPA	-	1.6	2.7	2.8	2.5
Fladgate Partnership, The	0.5	1.0	1.5	2.1	2.1
Quinta Do Noval Vinhos SA	3.2	3.3	2.0	1.9	1.0
González Byass SA	0.3	0.5	0.5	0.5	0.5
Bella Vista ES	0.6	0.6	0.5	0.5	0.5
Campari Milano SpA, Davide	0.2	0.2	0.3	0.3	0.4
Bodegas Baron SA	-	0.2	0.3	0.3	0.3
Garvey Grupo	0.7	0.7	0.3	0.4	0.1
Fortune Brands Inc	-	-	-	-	-
Private Label	23.7	22.9	22.2	22.6	22.5
Others	11.5	7.8	6.4	4.1	5.1
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 108 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2013-2017

% total volume

Company	2013	2014	2015	2016	2017
Bacardi Martini Belgium SA	33.1	33.6	35.9	36.1	35.8
Symington Family Estates	6.4	7.6	9.6	10.5	10.6
Pernod Ricard Belgium	7.0	5.8	5.7	5.8	6.0
Diageo Belgium NV SA	6.5	6.9	5.4	5.0	5.5
Grupo Osborne SA	4.5	4.5	4.3	4.5	4.4
Etn Franz Colruyt NV	4.3	4.2	4.1	4.2	4.2
Delhaize 'Le Lion' SA	3.7	3.6	3.4	3.4	3.4
Carrefour Belgium SA/NV	3.3	3.2	3.1	3.1	3.0
Cinoco SA	0.8	1.4	2.0	2.6	2.7
Familli Gancia & CSPA	-	1.6	2.7	2.8	2.5
MCS NV SA	2.0	2.0	1.7	1.9	1.9
Bruggeman NV	-	1.2	1.0	1.1	1.1
Quinta Do Noval Vinhos SA	3.2	3.3	2.0	1.9	1.0
Bella Vista ES	0.6	0.6	0.5	0.5	0.5
Bodegas y Bebidas SA (Grupo)	-	0.2	0.3	0.3	0.3
Garvey Grupo	0.7	0.7	0.3	0.4	0.1
Other Private Label	12.4	12.0	11.6	11.8	11.9
Others	11.5	7.8	6.4	4.1	5.1
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 109 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
Martini (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	24.5	24.8	25.1	25.7
Offley (Sogrape Group)	Bacardi Martini Belgium SA	4.5	6.6	6.8	6.4
Cruz (La Martiniquaise SVS)	Diageo Belgium NV SA	6.9	5.4	5.0	5.5
Osborne	Grupo Osborne SA	4.5	4.3	4.5	4.4
Sandeman (Sogrape Group)	Pernod Ricard Belgium	5.8	4.6	4.4	4.4
Colruyt (Private Label)	Etn Franz Colruyt NV	4.2	4.1	4.2	4.2
Porto Amuro	Symington Family Estates	3.4	3.4	3.5	3.4
Delhaize (Private Label)	Delhaize 'Le Lion' SA	3.6	3.4	3.4	3.4
Cockburn's	Symington Family Estates	3.0	3.1	3.4	3.4
Carrefour (Private Label)	Carrefour Belgium SA/NV	3.2	3.1	3.1	3.0
Other Private Label (Private Label)	Other Private Label	12.0	11.6	11.8	11.9
Others	Others	24.4	25.6	24.8	24.3
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 110 GBO Company Shares of Non-grape Wine: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Néobulles SA	-	41.2	46.2	25.6	25.0
Siebrand Groep BV	37.5	49.2	28.4	25.6	25.0
Heineken NV	29.6	-	-	-	-
Others	32.9	9.6	25.5	48.8	50.0
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 111 NBO Company Shares of Non-grape Wine: % Total Volume 2013-2017

% total volume Company	2013	2014	2015	2016	2017
Néobulles SA	-	41.2	46.2	25.6	25.0
Siebrand Groep BV	37.5	49.2	28.4	25.6	25.0
Stassen NV SA	29.6	-	-	-	-
Others	32.9	9.6	25.5	48.8	50.0
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 112 LBN Brand Shares of Non-grape Wine: % Total Volume 2014-2017

% total volume Brand (Global Brand Owner)	Company	2014	2015	2016	2017
Vivaro	Néobulles SA	41.2	46.2	25.6	25.0
Pikeurtje	Siebrand Groep BV	49.2	28.4	25.6	25.0
Vivaro (Heineken NV)	Stassen NV SA	-	-	-	-
Others	Others	9.6	25.5	48.8	50.0
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 113 Forecast Sales of Wine by Category: Total Volume 2017-2022

million litres	2017	2018	2019	2020	2021	2022
Fortified Wine and Vermouth	17.4	17.1	17.0	17.0	16.9	16.9
- Port	8.3	8.1	8.0	7.9	7.8	7.8
- Sherry	1.0	0.9	0.9	0.8	0.8	0.8
- Vermouth	8.1	8.1	8.2	8.2	8.3	8.3
- Other Fortified Wine	-	-	-	-	-	-
Non-Grape Wine	0.0	-	-	-	-	-
- Fruit Wine	0.0	-	-	-	-	-
Sparkling Wine	31.9	31.8	32.0	32.4	33.2	34.3
- Champagne	5.9	5.9	6.0	6.1	6.1	6.2

- Other Sparkling Wine	26.0	25.9	26.0	26.4	27.1	28.1
Still Light Grape Wine	227.5	224.7	223.4	223.6	224.5	225.6
- Still Red Wine	109.6	106.9	105.1	104.3	104.0	103.8
- Still Rosé Wine	40.0	40.7	41.6	42.4	43.4	44.3
- Still White Wine	77.9	77.0	76.7	76.8	77.1	77.6
Wine	276.8	273.6	272.3	272.9	274.6	276.8

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 114 Forecast Sales of Wine by Category: Total Value 2017-2022

EUR million	2017	2018	2019	2020	2021	2022
Fortified Wine and Vermouth	198.8	196.8	196.4	196.0	196.1	196.7
- Port	100.2	98.0	96.5	95.2	94.3	93.7
- Sherry	11.2	10.4	9.9	9.5	9.1	8.8
- Vermouth	87.3	88.4	90.0	91.3	92.7	94.2
- Other Fortified Wine	-	-	-	-	-	-
Non-Grape Wine	0.4	-	-	-	-	-
- Fruit Wine	0.4	-	-	-	-	-
Sparkling Wine	664.8	670.3	679.6	690.8	706.0	725.9
- Champagne	325.1	331.7	339.1	346.4	354.4	363.4
- Other Sparkling Wine	339.7	338.6	340.5	344.4	351.7	362.5
Still Light Grape Wine	2,026.1	2,007.3	2,006.0	2,009.5	2,019.3	2,031.8
- Still Red Wine	1,102.6	1,084.5	1,077.6	1,073.3	1,073.2	1,074.8
- Still Rosé Wine	267.2	270.7	274.8	279.1	284.3	289.5
- Still White Wine	656.3	652.1	653.5	657.1	661.8	667.5
Wine	2,890.1	2,874.3	2,882.0	2,896.3	2,921.5	2,954.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 115 Forecast Sales of Wine by Category: % Total Volume Growth 2017-2022

% total volume growth	2017/18	2017-22 CAGR	2017/22 Total
Fortified Wine and Vermouth	-1.4	-0.6	-2.9
- Port	-2.4	-1.3	-6.5
- Sherry	-7.1	-4.9	-22.2
- Vermouth	0.3	0.7	3.3
- Other Fortified Wine	-	-	-
Non-Grape Wine	-	-	-
- Fruit Wine	-	-	-
Sparkling Wine	-0.1	1.5	7.7
- Champagne	0.8	1.1	5.8
- Other Sparkling Wine	-0.3	1.6	8.2
Still Light Grape Wine	-1.3	-0.2	-0.8
- Still Red Wine	-2.5	-1.1	-5.3
- Still Rosé Wine	1.8	2.0	10.7
- Still White Wine	-1.1	-0.1	-0.5
Wine	-1.1	0.0	0.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 116 Forecast Sales of Wine by Category: % Total Value Growth 2017-2022

% local currency, constant value growth

	2017/2018	2017-22 CAGR	2017/22 Total
Fortified Wine and Vermouth	-1.0	-0.2	-1.1
- Port	-2.3	-1.3	-6.5
- Sherry	-7.2	-4.8	-22.0
- Vermouth	1.2	1.5	7.9
- Other Fortified Wine	-	-	-
Non-Grape Wine	-	-	-
- Fruit Wine	-	-	-
Sparkling Wine	0.8	1.8	9.2
- Champagne	2.0	2.3	11.8
- Other Sparkling Wine	-0.3	1.3	6.7
Still Light Grape Wine	-0.9	0.1	0.3
- Still Red Wine	-1.6	-0.5	-2.5
- Still Rosé Wine	1.3	1.6	8.4
- Still White Wine	-0.6	0.3	1.7
Wine	-0.5	0.4	2.2

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources