



# Passport

## Alcoholic Drinks in Belgium

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# ALCOHOLIC DRINKS IN BELGIUM - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Volume Sales Continue To Decline

Total volume sales continued to decline in Belgium in 2018. The main reason was the purchasing behaviour of Belgians. While real alcoholic drinks consumption is not declining, crossing the border to buy alcoholic drinks has become a habit among Belgian consumers. Higher excise duties have made alcoholic drinks more expensive in Belgium than in neighbouring countries. Premiumisation is another key reason for sales decline. Belgians tend to buy better quality alcoholic drinks, but in lower quantities, at least within the country. This is most visible in the on-trade rather than the off-trade channel. Thus, total current value sales decreased at a slower pace than total volume sales in 2018.

### Lower Abv and Better Experience Create Value

Belgians want to improve their alcohol experience in both the on-trade and off-trade channels. Premiumisation is the main way for both consumers and manufacturers to upgrade their experience. While alcoholic drinks manufacturers innovate with or promoting their premium offerings, consumers are willing to pay more. For instance, some consumers of gin are switching from Gordon's to Tanqueray or from a lager to a special local beer. Despite a general decrease in volume, some categories prospered by improving the consumer experience. Dark rum, single malt Scotch whisky and English gin manufacturers easily convince the consumer that a premium version will provide a better experience. Local beer producers are also enjoying their premium image among Belgians.

Government awareness campaigns and rising health consciousness encourage Belgians to lower their alcohol consumption. On the manufacturer side, launching lower abv versions meet consumer needs and lower the excise percentage on their drinks, making them more affordable. Belgians are also opting for an alcohol-free version of their favourite alcoholic drink. Indeed, alcohol-free drinks are perceived as healthier and more socially acceptable in some circumstances, such as at business events. The alcohol-free concept has gained in popularity since Anheuser-Busch InBev launched Jupiler 0,0 with a new de-alcoholising method. The popularisation of non alcoholic free beer spread to other categories, such as still light grape wine, sparkling wine, RTDs and even spirits. Many industry players feel that alcohol-free is a long-term trend and likely to continue to expand over the forecast period.

### Smaller Players Deal Better With Fluctuations

Big manufacturers are most affected by the decrease in total volume sales. Losses are being felt in both volume and value terms. In addition, after the increase in excise tax, some manufacturers, such as Diageo Belgium in 2018, abandoned their price promotion strategy. Therefore, alcoholic drinks manufacturers are using premiumisation to limit value losses. On the contrary, smaller players, such as distributors/importers like Alcobrands and Cinoco, are often more flexible and more likely to adapt quickly to the market.

As the industry in Belgium is always developing more premium and multi-niche areas, small players seem better placed to thrive. This leads to an increasing number of smaller players. Nevertheless, bigger manufacturers retain the marketing power to drive trends. For instance,



growing categories in Belgium, such as English gin, dark rum and bitters, as well as alcohol-free versions, are all largely the result of multinationals' marketing efforts. Smaller and local manufacturers are developing faster. Indeed, lifestyle trends in Belgium and globally are seeing a shift towards locally-produced products, across a range of industries, including alcoholic drinks.

## Mid-priced Positioning Hit by Distribution Trends

The mid-priced segment is fading in Belgium. This directly strengthens discounters as low-priced alcoholic drink retailers in Belgium. At the same time, specialists and wholesalers benefit as they increasingly stock premium alcoholic drinks. In wine, for instance, Aldi and Lidl constantly increase their ranges and experience big success during the wine fairs they organise. Before going abroad, the increase in excise also pushed more people to purchase their alcoholic drinks from discount retailers. The success of discounters is evinced by more and more spirits and RTDs manufacturers trying to secure listings with these German retailers. For consumers looking for premium alcoholic drinks, specialist retailers are becoming the format of choice.

Nevertheless, supermarkets remained the leading distribution channel in Belgium in 2018. However, it is becoming increasingly difficult for alcoholic drinks manufacturers to create value in regular supermarkets. Indeed, margins are declining year-on-year, and retailers prefer to focus on healthy-image fresh food shelves. On-trade volume and current value sales continued to decline in 2018. Moreover, the number of on-trade establishments serving alcohol is shrinking. The main reason is that consumers cannot find what they are looking for in regular on-trade outlets and often prefer to stay at home. In contrast, on-trade points offering a specific or unique concept are performing well, especially premium venues such as cocktail bars or pop-ups linked to a specific brand or event, such as Bacardi Bar.

## Total Volume Sales Set To Decline Further Over the Forecast Period

Alcoholic drinks is expected to continue to see total volume sales fall during the forecast period. The generalisation of cross-border trade and the reduction of alcohol consumption for health reasons continue to put pressure on the category. Nevertheless, the rate of decline is expected to slow, and alcoholic drinks manufacturers can still expect an increase in some categories, such as dark rum and single malt Scotch whisky.

In the context of ongoing volume sales decline, premiumisation is predicted to be a key strategy for manufacturers looking to create value during the forecast period. Therefore, there are expected to be numerous premium innovations and marketing campaigns promoting their benefits, such as Laurent-Perrier degustation during selective events. Alcohol-free versions are another anticipated key strategy for alcoholic drinks manufacturers. It is likely that the demand for these versions will continue to increase rapidly over the forecast period and reach more categories.

## MARKET BACKGROUND

### Legislation

#### Legal purchasing age and legal drinking age

- The legal age for purchasing alcohol in Belgium is 18-years-old for spirits and 16-years-old for wine and beer. 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 2018, the Health Minister aimed to clarify this rule. In the off-trade channel, the relevant legislation states that it is illegal to sell or offer for free distilled drinks to consumers under 18-years-old 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.

### Drink driving

- Belgian driving legislation states 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 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 2018. "BOB" is the "dedicated driver" among a group of people on a "night 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 winter 2015, when only 2.5% of drivers tested were above the legal alcohol blood limit. The verb "bobber" has entered the Belgian vocabulary following the success of "BOB".
- The legal blood alcohol limit for drivers holding a licence for less than three years is 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, albeit very similar, rulings. Five laws or decrees regulate radio and television programmes, and all 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 health-centric 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 alcoholic drinks in Belgium. The Covenant represents an efficient system of self-regulation for the industry; it also provides a system of sanctions for breaches of the Covenant. These are designed to protect consumers from excessive or misleading advertising. The Code of Conduct has received 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, thereby becoming smoking bars/pubs. However, the ban encompassed all on-trade outlets, including all bars and nightclubs, from summer 2011. 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, 7-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, consumer foodservice 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. These have led to additional administrative tasks and costs for operators, while also depriving them of some of the leeway they need to survive. As a result, many establishments, mostly small ones, have closed. For example, many bars/pubs closed over the review period.
- Another requirement is the “Black Box”, which records all inputs and outputs. The “Black Box” became compulsory for all on-trade 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. 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 shown that while Belgians used to prefer cafés for socialising, they are increasingly opting for the comfort of their own home when 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 the 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, with cocktail bars being very popular.
- The conclusion is that there has been a clear shift from the on-trade to the off-trade channel. Cocktails, one of the major trends affecting alcoholic drinks, 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”, which 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 2013-2018

	2013	2014	2015	2016	2017	2018
Cafés/Bars	9,052	8,605	8,390	8,096	7,964	7,829
Full-Service Restaurants	26,810	26,741	26,623	26,173	25,878	25,618
Limited-Service Restaurants	7,288	7,196	7,157	7,043	6,999	6,942
Self-Service Cafeterias	126	106	106	116	123	126
Street Stalls/Kiosks	1,088	1,051	1,026	1,006	981	958
TOTAL	44,364	43,699	43,302	42,434	41,945	41,473

Source: Euromonitor International

## TAXATION AND DUTY LEVIES

- The taxation and duty on alcoholic drinks did not change in 2018. Nevertheless, several professional organisations and important players are asking the government to revise its position on excises. Indeed, an increase in excise tax in the review period led to huge losses for both the industry and the Belgian government.

### Summary 1 Taxation and Duty Levies on Alcoholic Drinks 2018

Excise tax	Value	Volume/Value Unit
Beer	2.00	per hectolitre
Still Wine	74.90	per hectolitre
Sparkling Wine	256.30	per hectolitre
Spirits	2.992.80	per hectolitre
RTDs	2.992.80	per hectolitre
Cider/Perry	256.30	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 consumer foodservice. 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 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 outlets also sell alcoholic drinks duty free to Belgian residents “through the back door” or “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, Belgium is one of the most heavily taxed European countries, which encourages consumers 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 the individual level is well-known in Belgium, it is difficult to measure as there is no official data. Some unofficial data suggests that cross-border trade is equivalent to 8-10% of total alcoholic drink consumption in Belgium.

## KEY NEW PRODUCT LAUNCHES

With the two major trends in alcoholic drinks in Belgium in 2018 being premiumisation and the demand for lower abv alcoholic drinks, most new product developments in 2018 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.

## Outlook

The lower abv and alcohol-free trends are set to be robust and remain a big part of any new product development in the forecast period. With volume sales declining, premiumisation is expected to remain the key strategy to create value in alcoholic drinks. Therefore, more premium-focused new product development is anticipated in the forecast period.

## MARKET INDICATORS

Table 2 Retail Consumer Expenditure on Alcoholic Drinks 2013-2018

EUR million	2013	2014	2015	2016	2017	2018
Total	3,115.2	3,216.5	3,327.5	3,364.1	3,369.0	3,464.8

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

Note: 2016 data is forecast

## MARKET DATA

Table 3 Sales of Alcoholic Drinks by Category: Total Volume 2013-2018

	2013	2014	2015	2016	2017	2018
Beer (million litres)	857.9	833.6	816.0	798.7	777.3	762.4
Cider/Perry ('000 litres)	2,593.5	2,558.5	2,690.3	2,971.0	3,061.6	3,165.6
RTDs ('000 litres)	4,894.1	4,926.5	4,875.1	4,582.0	4,394.0	4,269.9
Spirits ('000 litres)	37,205.6	36,837.4	36,520.4	30,209.8	27,676.3	26,327.8
Wine (million litres)	328.9	330.4	330.5	311.7	303.3	297.3
Alcoholic Drinks (million litres)	1,231.6	1,208.3	1,190.6	1,148.2	1,115.7	1,093.5

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

**Table 4 Sales of Alcoholic Drinks by Category: Total Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Beer	4,339.3	4,287.9	4,269.2	4,267.2	4,201.0	4,193.0
Cider/Perry	9.1	9.1	9.7	10.8	11.7	12.7
RTDs	43.0	43.4	43.5	43.3	46.4	45.6
Spirits	1,190.6	1,212.6	1,249.6	1,156.2	1,094.7	1,066.9
Wine	3,230.2	3,304.7	3,376.5	3,407.7	3,363.6	3,347.4
Alcoholic Drinks	8,812.2	8,857.6	8,948.5	8,885.2	8,717.3	8,665.5

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 Volume Growth 2013-2018**

% total volume growth	2017/18	2013-18 CAGR	2013/18 Total
Beer	-1.9	-2.3	-11.1
Cider/Perry	3.4	4.1	22.1
RTDs	-2.8	-2.7	-12.8
Spirits	-4.9	-6.7	-29.2
Wine	-2.0	-2.0	-9.6
Alcoholic Drinks	-2.0	-2.4	-11.2

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 Value Growth 2013-2018**

% local currency, current value growth	2017/18	2013-18 CAGR	2013/18 Total
Beer	-0.2	-0.7	-3.4
Cider/Perry	8.4	6.9	39.6
RTDs	-1.7	1.2	6.1
Spirits	-2.5	-2.2	-10.4
Wine	-0.5	0.7	3.6
Alcoholic Drinks	-0.6	-0.3	-1.7

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 by Off-trade vs On-trade: Volume 2018**

	Off-trade	On-trade	Total
Beer (million litres)	426.5	335.9	762.4
Cider/Perry ('000 litres)	2,658.6	507.0	3,165.6
RTDs ('000 litres)	3,414.9	855.1	4,269.9
Spirits ('000 litres)	20,601.7	5,726.0	26,327.8

Wine (million litres)	231.8	65.5	297.3
Alcoholic Drinks (million litres)	685.0	408.5	1,093.5

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: Value 2018**

EUR million	Off-trade	On-trade	Total
Beer	1,019.2	3,173.8	4,193.0
Cider/Perry	10.6	2.1	12.7
RTDs	24.6	21.0	45.6
Spirits	521.6	545.3	1,066.9
Wine	1,845.8	1,501.6	3,347.4
Alcoholic Drinks	3,421.8	5,243.7	8,665.5

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: % Volume 2018**

% volume analysis	Off-trade	On-trade	Total
Beer	55.9	44.1	100.0
Cider/Perry	84.0	16.0	100.0
RTDs	80.0	20.0	100.0
Spirits	78.3	21.7	100.0
Wine	78.0	22.0	100.0
Alcoholic Drinks	62.6	37.4	100.0

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: % Value 2018**

% value analysis	Off-trade	On-trade	Total
Beer	24.3	75.7	100.0
Cider/Perry	83.8	16.2	100.0
RTDs	54.0	46.0	100.0
Spirits	48.9	51.1	100.0
Wine	55.1	44.9	100.0
Alcoholic Drinks	39.5	60.5	100.0

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

**Table 11 GBO Company Shares of Alcoholic Drinks: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Anheuser-Busch InBev NV	35.8	35.6	36.4	36.8	36.4



Heineken NV	8.7	8.6	8.8	9.2	9.3
Duvel Moortgat NV	3.1	3.2	3.3	3.5	3.6
Swinkels Family Brewers NV	-	-	-	-	2.1
Société Commerciale de Brasserie SA/Brouwerij Handelsmaatschappij NV	1.9	1.9	2.0	1.9	1.9
Diageo Plc	1.9	1.9	1.8	1.7	1.7
Carlsberg A/S	1.5	1.5	1.5	1.5	1.5
Bacardi & Co Ltd	1.2	1.3	1.3	1.3	1.3
Tatsuuma-Honke Brewing Co Ltd	1.6	1.6	1.4	1.3	1.3
Brouwerij der Trappisten van Westmalle cvba	1.0	1.0	1.1	1.1	1.1
Private Label	14.5	14.7	14.8	14.7	14.7
Others	28.7	28.7	27.7	26.9	25.1
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 12 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2013-2018

% off-trade	2013	2014	2015	2016	2017	2018
Store-Based Retailing	96.5	96.4	96.2	95.9	95.4	95.0
- Grocery Retailers	96.5	96.4	96.2	95.9	95.4	95.0
-- Discounters	7.9	7.8	7.7	7.7	8.4	8.5
-- Food/drink/tobacco specialists	3.6	3.5	3.4	3.4	3.7	3.7
-- Hypermarkets	8.7	8.4	8.0	8.0	8.6	8.4
-- Small Grocery Retailers	10.3	10.0	9.8	9.8	10.8	10.8
--- Convenience Stores	4.7	4.7	4.6	4.7	5.2	5.2
--- Forecourt Retailers	0.7	0.6	0.6	0.5	0.6	0.5
--- Independent Small Grocers	4.9	4.8	4.6	4.6	5.0	5.1
-- Supermarkets	51.2	50.2	49.5	49.3	53.6	54.6
-- Other Grocery Retailers	14.8	16.5	17.8	17.6	10.4	8.9
- Non-Grocery Specialists	-	-	-	-	-	-
-- Drugstores/parapharmacies	-	-	-	-	-	-
-- Other Non-Grocery Alcoholic Drinks Specialists	-	-	-	-	-	-
- Mixed Retailers	-	-	-	-	-	-
-- Department Stores	-	-	-	-	-	-
-- Mass Merchandisers	-	-	-	-	-	-
-- Variety Stores	-	-	-	-	-	-
-- Warehouse Clubs	-	-	-	-	-	-
Non-Store Retailing	3.5	3.6	3.8	4.1	4.6	5.0
- Direct Selling	0.3	0.3	0.3	0.3	0.3	0.3
- Homeshopping	0.0	0.0	0.0	0.0	0.0	0.0
- Internet Retailing	3.0	3.1	3.3	3.6	4.1	4.5
- Vending	0.2	0.2	0.2	0.2	0.2	0.1
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 13** Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2018

% off-trade	Beer	Cider/Perry	RTDs	Spirits	Wine
Store-Based Retailing	95.5	95.8	94.6	93.0	91.6
- Grocery Retailers	95.5	95.8	94.6	93.0	91.6
-- Discounters	12.3	12.4	8.7	10.9	13.3
-- Food/drink/tobacco specialists	1.6	1.3	3.0	7.4	7.4
-- Hypermarkets	6.4	7.1	7.1	10.7	7.3
-- Small Grocery Retailers	9.0	7.1	14.9	3.3	6.4
--- Convenience Stores	4.4	4.1	6.7	3.1	3.2
--- Forecourt Retailers	0.6	0.2	2.1	0.0	0.1
--- Independent Small Grocers	4.0	2.8	6.1	0.2	3.1
-- Supermarkets	66.1	67.9	61.0	60.8	57.2
-- 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	4.5	4.2	5.4	7.0	8.4
- Direct Selling	0.0	0.0	0.0	0.0	1.0
- Homeshopping	0.0	0.0	0.0	0.0	0.0
- Internet Retailing	4.5	4.2	5.3	7.0	7.4
- Vending	0.0	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

**Table 14** Forecast Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Million litres	2018	2019	2020	2021	2022	2023
Beer	762.4	746.7	732.1	721.6	713.4	706.1
Cider/Perry	3.2	3.3	3.4	3.5	3.5	3.6
RTDs	4.3	4.2	4.1	4.0	4.0	3.9
Spirits	26.3	25.4	24.7	24.2	23.8	23.5
Wine	297.3	292.0	288.1	285.6	283.9	282.6
Alcoholic Drinks	1,093.5	1,071.6	1,052.4	1,038.9	1,028.6	1,019.7

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

**Table 15** Forecast Sales of Alcoholic Drinks by Category: Total Value 2018-2023

EUR million	2018	2019	2020	2021	2022	2023
Beer	4,193.0	4,187.3	4,183.2	4,197.5	4,227.8	4,265.5
Cider/Perry	12.7	13.6	14.4	15.0	15.3	15.3
RTDs	45.6	44.8	44.3	43.9	43.5	42.4
Spirits	1,066.9	1,039.7	1,018.3	1,002.6	991.1	983.2
Wine	3,347.4	3,281.6	3,228.6	3,186.9	3,157.8	3,134.3
Alcoholic Drinks	8,665.5	8,567.0	8,488.7	8,445.9	8,435.5	8,440.7

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

**Table 16** Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

% total volume growth	2018/19	2018-23 CAGR	2018/23 Total
Beer	-2.1	-1.5	-7.4
Cider/Perry	3.6	2.6	13.6
RTDs	-2.3	-1.9	-9.2
Spirits	-3.5	-2.2	-10.8
Wine	-1.8	-1.0	-5.0
Alcoholic Drinks	-2.0	-1.4	-6.7

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

**Table 17** Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

% local currency, constant value growth	2018/2019	2018-23 CAGR	2018/23 Total
Beer	-0.1	0.3	1.7
Cider/Perry	7.5	3.9	21.3
RTDs	-1.6	-1.4	-7.0
Spirits	-2.5	-1.6	-7.8
Wine	-2.0	-1.3	-6.4
Alcoholic Drinks	-1.1	-0.5	-2.6

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 at 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
Trade Associations	Office Belge du Commerce Extérieur
	PEE Bruxelles
	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 Medeira
	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 Brewers Of Europe Forum
	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

- Total volume sales drop by 2% in 2018 to reach 762 million litres
- Low abv and non alcoholic options gain appeal
- Non alcoholic beer sees the highest total volume sales growth of 24% in 2018
- The average unit price increases by 2% in total current value terms in 2018
- Anheuser-Busch InBev dominates in 2018, but small breweries gain ground
- Beer is set to see a negative 2% total volume CAGR over the forecast period to reach 706 million litres in 2023

## PROSPECTS

### Volume Is Still Declining

Total volume sales continued to decrease in 2018. While responsible consumption and health consciousness were the main reasons, government actions against alcohol consumption had the major impact on the volume of beer consumed, especially in the on-trade channel. Lager was most affected, as on- and off-trade consumers preferred to consume a smaller volume of craft, local and speciality beer over lager. In addition to this switch from regular lager to more premium beers, lager manufacturers promoted premium lagers, such as Castel Beer and Vedett. Consequently, despite a notable decrease in total volume sales, beer was stable in total value sales, including an increase in off-trade value terms.

As the government continues its campaign against alcohol consumption (for instance, a ban on alcohol sales on motorways), Belgians are likely to decrease their beer consumption for health reasons over the forecast period. Unit prices are set to increase due to concentration and increasing production costs and the demand for premium beer.

### Further Diversification Is Expected

As beer faces growing competition from other alcoholic drinks, manufacturers need to diversify. Indeed, new generations like to try new flavours. Along with new discoveries, they want softer and sweeter tastes. Therefore, it is expected that blond beers will make gains on brown and dark beers. Also, fruit and craft beers are expected to increase in popularity. Chouffe Cherry, launched in 2018, is a good example of such diversification. Another example of diversification is likely to come from the November 2018 acquisition of the British manufacturer Jarr Kombucha by Duvel Moortgat. However, industry experts warn Belgian brewers to be careful with diversification strategies, because their fast pace of innovation may result in less rigorous quality controls and jeopardise their reputation.

### Non/low Alcohol Beer Boosts the Category

Low abv and non alcoholic options were the major trend in beer in 2018. These beers are increasingly popular as Belgians move towards more responsible and less harmful consumption. After the big success of Jupiler 0,0, the non alcoholic beer range has grown with

Palm 0%, Carlsberg 0% and Maes 0%. Non alcoholic beer is cannibalising the declining lager category, and alcohol-free versions are likely to move into other beer categories.

A small brewery in Bruges launched SportZot with 0.4 % abv in 2018; thereby introducing a (nearly) zero alcohol version in ale. In 2019, Anheuser Busch InBev plans to launch Leffe 0.0%, an alcohol-free version of abbey beer, Leffe 0.0%. In this way, the beer leader aims to add dynamism to non-alcoholic beer. Based on the success of non alcoholic beer in 2018, more versions are anticipated in the forecast period. However, de-alcoholising technology remains a big investment; therefore few local craft breweries are expected to launching 0.0% versions.

## COMPETITIVE LANDSCAPE

### Anheuser-Busch Inbev Dominates

Anheuser-Busch InBev continued to dominate beer in 2018. Between early 2018 until the end of the FIFA World Cup in June-July, the multinational renamed its biggest brand Jupiler Belgium. With marketing emphasising the motto “We Are Belgium”, the brand moved away its image as a beer for men. Jupiler Pure Blonde was launched in 2018 for consumers who want lager with a lower abv and fewer calories. In addition to large marketing campaigns, the leader and second-ranked player Brouwerijen Alken Maes benefited from their move into non alcoholic beer. While Jupiler 0,0 is the leader in non alcoholic beer, Alken-Maes completed its range with Maes 0% in February 2018. The local Palm and international Carlsberg brands also launched alcohol-free versions. Meanwhile, through craft beer, smaller and local players performed well, including Duvel Moortgat with Vedett, Chouffe and Duvel.

### Off-trade Channel Gains Share

The off-trade channel gained share in beer in 2018, as Belgians favoured towards at-home consumption. This evolution was informed by improved beer aisles in supermarkets. Several supermarkets improved the way beer is displayed on the shelf, by grouping them by type, for example. A wide range also attracts beer consumers. For instance, Colruyt, a major beer seller in Belgium, also owns the off-trade exclusivity of some speciality beers, such as Floreffe, La Blanche de Brugge and Barbar.

### Focus on Quality Remains

With the success of smaller and local players, the number of breweries is still growing. In fact, there were over 250 breweries in Belgium in 2018. With the fast rise in new innovations in beer, manufacturers run the risk of creating a situation whereby consumers perceive the quality to be lower than before. Therefore, if Belgian beer manufacturers want to maintain their quality reputation, it will be important to decelerate the innovation rate and focus on the quality of the new production.

## CATEGORY BACKGROUND

### Lager Price Band Methodology

- Despite falling consumption, mid-priced lager continued to dominate total volume sales in 2018. Premium lager benefits mainly from domestic premium lager, such as Duvel Moortgat's Vedett. On the other hand, economy lager accounted for a minor and declining share of total



volume sales; as discounters introduced returnable crates, metal can packaging lost popularity.

- Local production became more important over the review period due to the rising popularity of ale. In the meantime, younger generations like to consume imported beer for the image they represent.

### Summary 3 Lager by Price Band 2018

Category	Price range per litre
Premium	Above EUR3.59
Mid-priced	Between EUR1.91-3.59
Economy	Below EUR1.91

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 18 Number of Breweries 2013-2018

	2013	2014	2015	2016	2017	2018
TOTAL	160	168	199	224	261	n/a

Source: Euromonitor International

## CATEGORY DATA

Table 19 Sales of Beer by Category: Total Volume 2013-2018

million litres	2013	2014	2015	2016	2017	2018
Dark Beer	250.7	248.8	247.6	247.3	247.7	248.3
- Ale	185.0	184.9	184.8	185.2	186.1	187.2
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	65.8	63.9	62.8	62.1	61.6	61.1
Lager	594.5	572.4	556.1	538.7	515.1	497.4
- Flavoured/Mixed Lager	8.0	7.9	7.9	8.0	8.2	8.4
- Standard Lager	586.6	564.5	548.2	530.7	506.9	489.0
-- Premium Lager	52.2	51.0	50.0	49.2	48.3	47.5
--- Domestic Premium Lager	27.6	27.5	27.5	27.5	27.4	27.2
--- Imported Premium Lager	24.7	23.5	22.5	21.7	21.0	20.3
-- Mid-Priced Lager	519.2	499.1	484.3	468.3	446.2	429.9
--- Domestic Mid-Priced Lager	509.2	489.3	474.8	459.2	437.5	421.6
--- Imported Mid-Priced Lager	10.0	9.8	9.5	9.2	8.7	8.3
-- Economy Lager	15.2	14.4	13.9	13.1	12.4	11.6
--- Domestic Economy Lager	15.2	14.4	13.9	13.1	12.4	11.6

--- Imported Economy Lager	-	-	-	-	-	-
Non/Low Alcohol Beer	8.3	8.1	8.2	8.6	10.4	12.8
- Low Alcohol Beer	0.6	0.6	0.6	0.6	0.7	0.7
- Non Alcoholic Beer	7.6	7.5	7.5	8.0	9.8	12.1
Stout	4.4	4.3	4.2	4.1	4.0	3.9
Beer	857.9	833.6	816.0	798.7	777.3	762.4

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

**Table 20 Sales of Beer by Category: Total Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Dark Beer	1,549.2	1,578.9	1,607.8	1,643.2	1,665.7	1,692.1
- Ale	1,098.6	1,130.4	1,157.2	1,188.2	1,210.2	1,234.8
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	450.6	448.6	450.7	455.0	455.4	457.3
Lager	2,718.2	2,636.7	2,588.1	2,548.3	2,453.7	2,411.1
- Flavoured/Mixed Lager	59.8	60.6	61.1	63.0	64.7	66.6
- Standard Lager	2,658.3	2,576.1	2,526.9	2,485.3	2,389.0	2,344.4
-- Premium Lager	361.7	362.3	361.9	362.5	356.4	352.0
--- Domestic Premium Lager	165.3	169.6	173.4	177.5	177.6	178.7
--- Imported Premium Lager	196.4	192.7	188.6	185.0	178.8	173.3
-- Mid-Priced Lager	2,266.2	2,184.6	2,136.7	2,095.7	2,007.6	1,968.7
--- Domestic Mid-Priced Lager	2,252.5	2,170.9	2,123.1	2,082.3	1,994.7	1,956.2
--- Imported Mid-Priced Lager	13.8	13.7	13.6	13.4	13.0	12.5
-- Economy Lager	30.4	29.3	28.3	27.1	25.0	23.7
--- Domestic Economy Lager	30.4	29.3	28.3	27.1	25.0	23.7
--- Imported Economy Lager	-	-	-	-	-	-
Non/Low Alcohol Beer	41.4	41.6	42.5	44.7	50.7	59.0
- Low Alcohol Beer	2.3	2.3	2.3	2.4	2.5	2.6
- Non Alcoholic Beer	39.1	39.2	40.1	42.3	48.2	56.4
Stout	30.5	30.6	30.8	31.0	30.8	30.9
Beer	4,339.3	4,287.9	4,269.2	4,267.2	4,201.0	4,193.0

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 Volume Growth 2013-2018**

% total volume growth	2017/18	2013-18 CAGR	2013/18 Total
Dark Beer	0.2	-0.2	-1.0
- Ale	0.6	0.2	1.2
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	-0.8	-1.5	-7.1
Lager	-3.4	-3.5	-16.3
- Flavoured/Mixed Lager	2.1	1.0	5.3

- Standard Lager	-3.5	-3.6	-16.6
-- Premium Lager	-1.7	-1.9	-9.1
--- Domestic Premium Lager	-0.6	-0.3	-1.4
--- Imported Premium Lager	-3.2	-3.8	-17.7
-- Mid-Priced Lager	-3.7	-3.7	-17.2
--- Domestic Mid-Priced Lager	-3.6	-3.7	-17.2
--- Imported Mid-Priced Lager	-4.7	-3.6	-16.7
-- Economy Lager	-6.4	-5.2	-23.5
--- Domestic Economy Lager	-6.4	-5.2	-23.5
--- Imported Economy Lager	-	-	-
Non/Low Alcohol Beer	22.5	9.1	54.4
- Low Alcohol Beer	2.9	1.0	5.1
- Non Alcoholic Beer	23.8	9.7	58.6
Stout	-1.4	-2.1	-10.3
Beer	-1.9	-2.3	-11.1

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 Value Growth 2013-2018**

% local currency, current value growth

	2017/18	2013-18 CAGR	2013/18 Total
Dark Beer	1.6	1.8	9.2
- Ale	2.0	2.4	12.4
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	0.4	0.3	1.5
Lager	-1.7	-2.4	-11.3
- Flavoured/Mixed Lager	2.9	2.2	11.3
- Standard Lager	-1.9	-2.5	-11.8
-- Premium Lager	-1.2	-0.5	-2.7
--- Domestic Premium Lager	0.6	1.6	8.1
--- Imported Premium Lager	-3.0	-2.5	-11.8
-- Mid-Priced Lager	-1.9	-2.8	-13.1
--- Domestic Mid-Priced Lager	-1.9	-2.8	-13.2
--- Imported Mid-Priced Lager	-3.1	-1.8	-8.8
-- Economy Lager	-5.3	-4.9	-22.1
--- Domestic Economy Lager	-5.3	-4.9	-22.1
--- Imported Economy Lager	-	-	-
Non/Low Alcohol Beer	16.3	7.4	42.6
- Low Alcohol Beer	4.3	2.4	12.7
- Non Alcoholic Beer	16.9	7.6	44.3
Stout	0.1	0.2	1.1
Beer	-0.2	-0.7	-3.4

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

**Table 23 Sales of Beer by Off-trade vs On-trade: Volume 2013-2018**

million litres

	2013	2014	2015	2016	2017	2018
Off-trade	453.6	451.1	448.1	442.3	432.7	426.5
On-trade	404.4	382.5	367.9	356.5	344.6	335.9
Total	857.9	833.6	816.0	798.7	777.3	762.4

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: Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Off-trade	978.2	994.7	1,005.1	1,014.2	1,006.4	1,019.2
On-trade	3,361.1	3,293.2	3,264.1	3,252.9	3,194.5	3,173.8
Total	4,339.3	4,287.9	4,269.2	4,267.2	4,201.0	4,193.0

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: % Volume Growth 2013-2018**

% volume growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	-1.4	-1.2	-6.0
On-trade	-2.5	-3.6	-16.9
Total	-1.9	-2.3	-11.1

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: % Value Growth 2013-2018**

% constant value growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	1.3	0.8	4.2
On-trade	-0.6	-1.1	-5.6
Total	-0.2	-0.7	-3.4

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

**Table 27 GBO Company Shares of Beer: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Anheuser-Busch InBev NV	51.9	51.9	52.3	52.8	52.2
Heineken NV	12.5	12.4	12.5	13.0	13.1
Duvel Moortgat NV	4.5	4.6	4.8	5.0	5.1
Swinkels Family Brewers NV	-	-	-	-	3.0
Société Commerciale de Brasserie SA/Brouwerij Handelsmaatschappij NV	2.8	2.8	2.8	2.8	2.8
Carlsberg A/S	2.1	2.1	2.1	2.1	2.1
Brouwerij der Trappisten van Westmalle cvba	1.5	1.5	1.6	1.6	1.6
Diageo Plc	1.6	1.6	1.6	1.5	1.5

Abbaye Notre Dame de Scourmont	1.1	1.2	1.2	1.2	1.3
Abbaye Notre Dame d'Orval	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
Brussels Beer Project	-	0.1	0.1	0.2	0.2
Brasserie de Bertinchamps	0.1	0.1	0.1	0.2	0.2
Abbaye Notre Dame de Saint-Remy	0.2	0.2	0.2	0.2	0.2
Asahi Group Holdings Ltd	-	-	0.2	0.2	0.1
Bavaria NV	-	-	2.1	2.8	-
Palm NV, Brouwerij	2.7	2.7	0.6	-	-
Brouwerij Bosteels NV	0.2	0.2	-	-	-
SABMiller Ltd	0.2	0.2	-	-	-
Modelo SA de CV, Grupo	-	-	-	-	-
De Koninck NV SA, Brouwerij	-	-	-	-	-
Private Label	4.1	4.1	4.1	3.9	3.9
Others	13.5	13.2	12.6	11.3	11.4
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 28 NBO Company Shares of Beer: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Anheuser-Busch InBev NV	51.3	51.4	51.5	52.0	51.4
Alken Maes NV SA, Brouwerijen	12.0	12.1	12.1	12.7	12.9
Duvel Moortgat NV	4.5	4.6	4.8	5.0	5.1
Palm NV, Brouwerij	2.1	2.1	2.1	2.8	3.0
Brouwerij Haacht NV SA	2.8	2.8	2.8	2.8	2.8
John Martin SA	2.0	2.0	2.0	1.9	2.0
Abdij der Trappisten van Westmalle	1.5	1.5	1.6	1.6	1.6
Delhaize 'Le Lion' SA	1.8	1.8	1.8	1.7	1.6
Carrefour Belgium SA/NV	1.6	1.6	1.6	1.5	1.5
Abbaye Notre Dame de Scourmont	1.1	1.2	1.2	1.2	1.3
Carlsberg Importers NV SA	1.2	1.2	1.2	1.2	1.2
Heineken NV	0.8	0.8	0.8	0.8	0.8
Abbaye Notre Dame d'Orval	0.5	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	0.3	0.3
Brussels Beer Project	-	0.1	0.1	0.2	0.2
Brasserie de Bertinchamps	0.1	0.1	0.1	0.2	0.2
Abbaye Notre Dame de Saint-Remy	0.2	0.2	0.2	0.2	0.2
SABMiller Ltd	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	-	-
De Koninck NV SA, Brouwerij	-	-	-	-	-
Jet Import NV SA	-	-	-	-	-
Other Private Label	0.6	0.6	0.6	0.6	0.7

Others	13.7	13.4	12.8	11.5	11.6
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 29 LBN Brand Shares of Beer: % Total Volume 2015-2018**

% total volume Brand (Global Brand Owner)	Company	2015	2016	2017	2018
Jupiler	Anheuser-Busch InBev NV	32.1	32.0	31.9	31.3
Leffe	Anheuser-Busch InBev NV	6.4	6.4	6.4	6.5
Stella Artois	Anheuser-Busch InBev NV	5.8	5.9	5.8	5.8
Maes Pils (Heineken NV)	Alken Maes NV SA, Brouwerijen	5.7	5.7	5.7	5.6
Hoegaarden	Anheuser-Busch InBev NV	2.7	2.8	2.8	2.9
Primus (Société Commerciale de Brasserie SA/ Brouwerij Handelsmaatschappij NV)	Brouwerij Haacht NV SA	2.5	2.5	2.5	2.4
Palm (Swinkels Family Brewers NV)	Palm NV, Brouwerij	-	-	-	2.2
Grimbergen (Heineken NV)	Alken Maes NV SA, Brouwerijen	1.9	1.9	2.0	2.0
Vedett	Duvel Moortgat NV	1.6	1.6	1.7	1.7
Westmalle (Brouwerij der Trappisten van Westmalle cvba)	Abdij der Trappisten van Westmalle	1.5	1.6	1.6	1.6
Palm	Palm NV, Brouwerij	2.1	-	-	-
Other Private Label (Private Label)	Other Private Label	0.6	0.6	0.6	0.7
Others	Others	37.1	39.0	39.0	37.3
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 30 Forecast Sales of Beer by Category: Total Volume 2018-2023**

million litres	2018	2019	2020	2021	2022	2023
Dark Beer	248.3	249.3	250.7	252.6	254.5	256.3
- Ale	187.2	188.5	190.1	192.0	194.0	195.9
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	61.1	60.8	60.6	60.5	60.5	60.4
Lager	497.4	480.3	463.9	450.8	440.0	430.2
- Flavoured/Mixed Lager	8.4	8.5	8.7	8.8	8.9	9.0
- Standard Lager	489.0	471.8	455.2	442.0	431.0	421.2
-- Premium Lager	47.5	47.0	46.8	46.6	46.6	46.6
--- Domestic Premium Lager	27.2	27.1	27.1	27.2	27.3	27.4
--- Imported Premium	20.3	19.9	19.7	19.5	19.3	19.2

Lager						
-- Mid-Priced Lager	429.9	413.8	397.9	385.2	374.6	365.0
--- Domestic Mid-Priced Lager	421.6	405.8	390.2	377.8	367.5	358.1
--- Imported Mid-Priced Lager	8.3	8.0	7.7	7.4	7.2	7.0
-- Economy Lager	11.6	11.0	10.5	10.1	9.8	9.5
--- Domestic Economy Lager	11.6	11.0	10.5	10.1	9.8	9.5
--- Imported Economy Lager	-	-	-	-	-	-
Non/Low Alcohol Beer	12.8	13.2	13.8	14.5	15.3	16.0
- Low Alcohol Beer	0.7	0.7	0.7	0.7	0.7	0.7
- Non Alcoholic Beer	12.1	12.5	13.1	13.8	14.5	15.3
Stout	3.9	3.9	3.8	3.8	3.7	3.7
Beer	762.4	746.7	732.1	721.6	713.4	706.1

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

**Table 31 Forecast Sales of Beer by Category: Total Value 2018-2023**

EUR million	2018	2019	2020	2021	2022	2023
Dark Beer	1,692.1	1,734.3	1,776.9	1,824.7	1,875.7	1,929.3
- Ale	1,234.8	1,272.5	1,310.1	1,352.6	1,397.9	1,445.3
- Sorghum	-	-	-	-	-	-
- Weissbier/Weizen/ Wheat Beer	457.3	461.8	466.8	472.1	477.8	483.9
Lager	2,411.1	2,360.8	2,311.3	2,274.8	2,250.9	2,232.1
- Flavoured/Mixed Lager	66.6	68.8	71.0	73.2	75.5	77.5
- Standard Lager	2,344.4	2,292.0	2,240.4	2,201.6	2,175.4	2,154.6
-- Premium Lager	352.0	351.5	351.8	352.9	354.6	357.2
--- Domestic Premium Lager	178.7	180.0	181.6	183.7	186.1	188.7
--- Imported Premium Lager	173.3	171.5	170.2	169.2	168.5	168.6
-- Mid-Priced Lager	1,968.7	1,918.0	1,866.9	1,827.9	1,800.5	1,777.5
--- Domestic Mid-Priced Lager	1,956.2	1,905.9	1,855.1	1,816.4	1,789.3	1,766.6
--- Imported Mid-Priced Lager	12.5	12.1	11.8	11.4	11.2	10.9
-- Economy Lager	23.7	22.6	21.6	20.9	20.4	19.9
--- Domestic Economy Lager	23.7	22.6	21.6	20.9	20.4	19.9
--- Imported Economy Lager	-	-	-	-	-	-
Non/Low Alcohol Beer	59.0	61.0	63.6	66.5	69.3	72.0
- Low Alcohol Beer	2.6	2.7	2.7	2.7	2.8	2.8
- Non Alcoholic Beer	56.4	58.4	60.9	63.7	66.6	69.2
Stout	30.9	31.1	31.4	31.6	31.9	32.1
Beer	4,193.0	4,187.3	4,183.2	4,197.5	4,227.8	4,265.5

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

**Table 32 Forecast Sales of Beer by Category: % Total Volume Growth 2018-2023**

% total volume growth	2018/19	2018-23 CAGR	2018/23 Total
Dark Beer	0.4	0.6	3.2
- Ale	0.7	0.9	4.7
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	-0.5	-0.2	-1.1
Lager	-3.4	-2.9	-13.5
- Flavoured/Mixed Lager	1.9	1.4	7.1
- Standard Lager	-3.5	-2.9	-13.9
-- Premium Lager	-1.0	-0.4	-1.8
--- Domestic Premium Lager	-0.4	0.2	0.8
--- Imported Premium Lager	-1.8	-1.1	-5.4
-- Mid-Priced Lager	-3.8	-3.2	-15.1
--- Domestic Mid-Priced Lager	-3.8	-3.2	-15.1
--- Imported Mid-Priced Lager	-3.8	-3.4	-16.0
-- Economy Lager	-4.9	-3.8	-17.8
--- Domestic Economy Lager	-4.9	-3.8	-17.8
--- Imported Economy Lager	-	-	-
Non/Low Alcohol Beer	3.1	4.6	25.3
- Low Alcohol Beer	1.9	1.5	7.5
- Non Alcoholic Beer	3.2	4.8	26.2
Stout	-1.6	-1.4	-7.0
Beer	-2.1	-1.5	-7.4

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

**Table 33 Forecast Sales of Beer by Category: % Total Value Growth 2018-2023**

% local currency, constant value growth	2018/2019	2018-23 CAGR	2018/23 Total
Dark Beer	2.5	2.7	14.0
- Ale	3.1	3.2	17.1
- Sorghum	-	-	-
- Weissbier/Weizen/Wheat Beer	1.0	1.1	5.8
Lager	-2.1	-1.5	-7.4
- Flavoured/Mixed Lager	3.3	3.1	16.4
- Standard Lager	-2.2	-1.7	-8.1
-- Premium Lager	-0.2	0.3	1.5
--- Domestic Premium Lager	0.7	1.1	5.6
--- Imported Premium Lager	-1.1	-0.6	-2.7
-- Mid-Priced Lager	-2.6	-2.0	-9.7
--- Domestic Mid-Priced Lager	-2.6	-2.0	-9.7
--- Imported Mid-Priced Lager	-3.5	-2.8	-13.0
-- Economy Lager	-4.7	-3.4	-16.1
--- Domestic Economy Lager	-4.7	-3.4	-16.1
--- Imported Economy Lager	-	-	-
Non/Low Alcohol Beer	3.5	4.1	22.1
- Low Alcohol Beer	1.8	1.3	6.6
- Non Alcoholic Beer	3.5	4.2	22.8
Stout	0.8	0.8	3.9
Beer	-0.1	0.3	1.7

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





# CIDER/PERRY IN BELGIUM - CATEGORY ANALYSIS

## HEADLINES

- Total volume sales rise by 3% in 2018 to reach 3.2 million litres
- “Modern cider” is the growth driver in 2018
- The average unit price increases by 5% in total current value terms in 2018
- Stassen leads in 2018 with a 45% total volume share
- A 3% total volume CAGR is expected over the forecast period to reach 3.6 million litres in 2023

## PROSPECTS

### “modern Cider” Boosts the Category

Cider has seen its formulation change from a traditional product made in small quantities to a sweet alcoholic beverage made from fruit juice concentrate. Often referred to as “modern cider”, these kinds of cider are sold in similar packaging to craft beer and often targeted at younger adults of legal drinking age. As a result, “modern ciders” are taking some sales away from beer and wine. Thus, the category is expected to continue to record total volume sales growth over the forecast period. “Modern cider” is not linked to gender; therefore, it is seen as a good alternative for consumption at barbecues or private parties. With dynamic players in the category, a growing target audience that appreciates a sweet taste and a relatively low penetration rate, “modern cider” is expected to record fast sales growth during the forecast period.

### Traditional Cider in Decline

While the “modern cider” offer is being developed through effective marketing and a sweet taste to appeal to younger adults, the same cannot be said for traditional cider. Traditional cider remained on a downward trajectory in 2018. This was largely due to the old-fashioned image of traditional cider and a general lack of investment on the part of manufacturers. Traditional cider is also beset by growing competition from outside the category, with more modern global brand names and well-marketed alternatives. Nevertheless, Stassen is constantly working on both the modernisation of the category and the promotion of the cider tradition. In 2018, the Belgian cider manufacturer opened an “education centre”, which aims to educate both the local population and tourists on the country’s traditional cider offer. This initiative could help to stem the declining demand for traditional cider, although more investment is required to make this type of beverage top-of-mind among younger adults in particular.

### Cider Set To Embrace the Alcohol-free Trend

Over the forecast period, cider/perry could benefit from the alcohol-free trend. Indeed, more and more Belgians are becoming more responsible drinkers and turning to alcohol-free versions of beer, bitters, cocktails and wines. 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, as these beverages lack a modern image, manufacturers will need to change their marketing strategies if they are to profit from the growth of the alcohol-free concept. Manufacturers of “modern cider” have not yet introduced alcohol-free variants, although these can be expected to appear over the forecast period.

## COMPETITIVE LANDSCAPE

### Cider Manufacturers Add Dynamism To the Category

Major players like Carlsberg Importers (Somersby) and Alken Maes (Strongbow), but also the smaller and traditional Belgian cider brand Ruwet, 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. As “modern” ciders appear to satisfy this desire, Alken Maes and Carlsberg Importers have breathed new life into the category. The dynamism shown by cider manufacturers may attract more new players and create new growth opportunities over the forecast period. Meanwhile, established players continued to extend their portfolios in 2018, with Carlsberg Importers introducing Somersby Blackberry and Alken Maes introducing Strongbow Red Berries and Strongbow Elderflower.

### Stassen Is An Active Leader

The leading player in the category is the traditional cider manufacturer, Stassen, which is owned by the Dutch giant Heineken. Stassen is adapting to the new preferences and developments in cider/perry. For example, it already offers a range of “modern ciders”. Although these products have yet to be made available in traditional retail outlets, this situation is expected to change over the forecast period. Moreover, in 2018, Stassen, launched a range of 0% alcohol cider with a clearer label and made efforts to tap into the mocktail trend. The player can be expected to continue to invest to maintain its strong leadership of the category, supported by its GBO.

### New Additions To the Cider Offer

The leading beer brewer, Anheuser-Busch InBev, is also following the developments in cider/perry. Indeed, under its Stella Artois brand, the company already sells cider in other countries, such as the UK. Stella Artois cider has previously been launched in Belgium, but withdrawn due to a lack of demand. Over the forecast period, it is possible that the company will relaunch the brand’s cider offer in the country. Meanwhile, a smaller player, Jet Import, expanded its range of premium drinks in 2018 with the addition of the Good Cider brand. Furthermore, the local player Ruwet launched Belgian Craft Cider, made from local apples and organic ingredients. The potential for growth in a generally declining industry, suggests that cider/perry will attract the interest and investment of large and smaller players in the forecast period.

## CATEGORY DATA

Table 34 Sales of Cider/Perry: Total Volume 2013-2018

'000 litres	2013	2014	2015	2016	2017	2018
Cider/Perry	2,593.5	2,558.5	2,690.3	2,971.0	3,061.6	3,165.6

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

**Table 35 Sales of Cider/Perry: Total Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Cider/Perry	9.1	9.1	9.7	10.8	11.7	12.7

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 Volume Growth 2013-2018**

% total volume growth	2017/18	2013-18 CAGR	2013/18 Total
Cider/Perry	3.4	4.1	22.1

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 Value Growth 2013-2018**

% local currency, current value growth	2017/18	2013-18 CAGR	2013/18 Total
Cider/Perry	8.4	6.9	39.6

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

**Table 38 Sales of Cider/Perry by Off-trade vs On-trade: Volume 2013-2018**

'000 litres	2013	2014	2015	2016	2017	2018
Off-trade	2,105.4	2,080.1	2,218.9	2,492.7	2,569.9	2,658.6
On-trade	488.1	478.4	471.4	478.3	491.6	507.0
Total	2,593.5	2,558.5	2,690.3	2,971.0	3,061.6	3,165.6

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: Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Off-trade	7.2	7.2	7.8	8.9	9.7	10.6
On-trade	1.9	1.8	1.8	1.9	2.0	2.1
Total	9.1	9.1	9.7	10.8	11.7	12.7

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: % Volume Growth 2013-2018**

% volume growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	3.4	4.8	26.3
On-trade	3.1	0.8	3.9
Total	3.4	4.1	22.1

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: % Value Growth 2013-2018**

% constant value growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	9.2	8.0	47.1
On-trade	4.5	2.0	10.7
Total	8.4	6.9	39.6

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

**Table 42 GBO Company Shares of Cider/Perry: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Heineken NV	50.5	50.2	50.6	54.3	62.1
Carlsberg A/S	8.6	9.7	11.7	14.6	14.9
Ruwet NV SA	4.7	3.6	3.0	3.1	3.5
C&C Group Plc	5.1	3.7	3.1	3.0	2.8
Stassen NV SA	-	-	-	-	-
Private Label	13.1	12.5	11.4	12.2	13.4
Others	18.0	20.2	20.2	12.7	3.4
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 43 NBO Company Shares of Cider/Perry: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Stassen NV SA	50.5	44.9	41.4	42.8	45.2
Alken Maes NV SA, Brouwerijen	-	5.3	9.3	11.5	16.9
Carlsberg Importers NV SA	8.6	9.7	11.7	14.6	14.9
Etn Franz Colruyt NV	3.8	3.6	3.3	3.5	3.8
Delhaize 'Le Lion' SA	3.4	3.3	3.0	3.2	3.5
Ruwet NV SA	4.7	3.6	3.0	3.1	3.5
Carrefour Belgium SA/NV	3.4	3.2	2.9	3.1	3.3
John Martin SA	5.1	3.7	3.1	3.0	2.8

Other Private Label	2.6	2.4	2.2	2.5	2.8
Others	18.0	20.2	20.2	12.7	3.4
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 44 LBN Brand Shares of Cider/Perry: % Total Volume 2015-2018**

% total volume					
Brand (Global Brand Owner)	Company	2015	2016	2017	2018
Stassen (Heineken NV)	Stassen NV SA	44.9	41.4	42.8	45.2
Strongbow (Heineken NV)	Alken Maes NV SA, Brouwerijen	5.3	9.3	11.5	16.9
Somersby (Carlsberg A/S)	Carlsberg Importers NV SA	9.7	11.7	14.6	14.9
Colruyt (Private Label)	Etn Franz Colruyt NV	3.6	3.3	3.5	3.8
Delhaize (Private Label)	Delhaize 'Le Lion' SA	3.3	3.0	3.2	3.5
Ruwet	Ruwet NV SA	3.6	3.0	3.1	3.5
Carrefour (Private Label)	Carrefour Belgium SA/NV	3.2	2.9	3.1	3.3
Magners (C&C Group Plc)	John Martin SA	3.7	3.1	3.0	2.8
Stassen Bio	Stassen NV SA	-	-	-	-
Stassen Excellence	Stassen NV SA	-	-	-	-
Other Private Label (Private Label)	Other Private Label	2.4	2.2	2.5	2.8
Others	Others	20.2	20.2	12.7	3.4
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 45 Forecast Sales of Cider/Perry: Total Volume 2018-2023**

'000 litres						
	2018	2019	2020	2021	2022	2023
Cider/Perry	3,165.6	3,279.6	3,380.8	3,465.8	3,535.9	3,596.4

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

**Table 46 Forecast Sales of Cider/Perry: Total Value 2018-2023**

EUR million						
	2018	2019	2020	2021	2022	2023
Cider/Perry	12.7	13.6	14.4	15.0	15.3	15.3

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

**Table 47 Forecast Sales of Cider/Perry: % Total Volume Growth 2018-2023**

% total volume growth	2018/19	2018-23 CAGR	2018/23 Total
Cider/Perry	3.6	2.6	13.6

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

**Table 48 Forecast Sales of Cider/Perry: % Total Value Growth 2018-2023**

% local currency, constant value growth	2018/2019	2018-23 CAGR	2018/23 Total
Cider/Perry	7.5	3.9	21.3

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

# RTDS IN BELGIUM - CATEGORY ANALYSIS

## HEADLINES

- Total volume sales fall by 3% in 2018 to reach 4.3 million litres
- Rising competition from bitters and flavoured beer hurt RTDs
- Sales of wine-based RTDs benefit from warm weather in 2018
- The average unit price increases by 1% in total current value terms in 2018
- Bacardi Martini Belgium leads with a 40% share of total volume sales in 2018
- RTDs is expected to see a negative 2% total volume CAGR over the forecast period to reach 3.9 million litres in 2023

## PROSPECTS

### Consumption Decline Set To Continue

The ongoing drop in demand for ready-to-drink alcoholic drinks is a paradox. As mixology and the cocktail trend are among the few positive factors for spirits, one could expect that RTDs would follow the same path. However, RTDs saw decreases in both total value and volume sales in 2018. As RTDs are perceived as low quality drinks, consumers tend to buy them outside the country's borders at lower prices. In addition, some health-conscious consumers prefer to make their own mix instead of buying RTDs. Moreover, Belgians are reducing their consumption of high abv beverages as they adopt more responsible drinking habits. This trend is also visible among younger adults of legal drinking age, who are the traditional consumers of RTDs. They are turning to lower abv options like cider or flavoured/mixed lager. The main target audience for RTDs makes it more difficult for manufacturers to use premiumisation to stimulate value sales. All these negative factors are likely to see RTDs remain on a downward trajectory in the forecast period.

### On-trade Channel To the Rescue?

Recent developments in the on-trade channel could provide opportunities for RTDs. Indeed, traditional on-trade outlets have been suffering for several years in Belgium, with players trying to reinvent their brands and offers. This has led to more and more pop-up stores and temporary events during special occasions. With more consumers asking for cocktails and mocktails, such places could offer RTD versions. Such a developments could provide manufacturers with the opportunity to remain relevant and recruit new consumers.

### Alcohol-free Opportunities

Alcohol-free drinks are growing in popularity in Belgium as local consumers adopt more responsible drinking habits. However, they still want beverages to look like alcoholic drinks when relaxing or socialising. This could see manufacturers of RTDs offer mocktails to Belgian consumers. The choice of mocktails is increasing in the on-trade channel, partly because of the "Tournée Minérale" campaign. Therefore, the range of mocktails is also likely to increase in the off-trade channel over the forecast period. After Bacardi launched low alcohol Martini & Tonic in



2017, Diageo released alcohol-free Gordon's Gin & Tonic in 2018. These novelties added to the range of premix mocktails already present in the market, such as virgin mojito. Their success would encourage further development in this direction.

## COMPETITIVE LANDSCAPE

### Bacardi Martini Belgium Remains the Clear Leader

Bacardi Martini Belgium continued to hold a comfortable lead in RTDs, mainly due to the popularity of its William Lawson Cola and Bacardi brands. However, the company's total volume share stagnated in 2018 as it did not invest in the category, but preferred to focus on cocktails. In fact, while Bacardi Mojito remained a major part of the company's portfolio, the manufacturer preferred to sell Bacardi Carta Blanca as a mojito ingredient rather than a ready-to-drink alternative.

### Alcohol-free Trend Informs New Product Development

The category's ongoing decline can partly be explained by a low level of innovation. Despite the eagerness of Belgian consumers to try new products, there were few new launches in RTDs in 2018. The most notable was alcohol-free Gordon's Gin & Tonic; available in lime and grapefruit flavours. At the end of 2018, the local alcohol-free drinks specialist Neobulles launched Vintense Ice. The Vintense Ice range consists of three mocktails: Americano Spritz, Bellini and Hugo. With these releases, Neobulles aims to benefit from the nascent alcohol-free trend in RTDs. With regard to innovation and new product launches, the alcohol-free trend provides a valuable growth opportunity for RTDs.

### Substitutes Put Pressure on Rtds

In addition to a lack of innovation, RTDs faces strong competition from other categories. For instance, the Belgian start-up Drink it Fresh launched iced cocktail mix packs in late 2018. The product is a 100% natural frozen concentrate. Consumers simply have to mix it with a spirit of their choice to obtain a cocktail. However, Drink it Fresh is only available from a few small retail points, such as Belgomarkt in Brussels. If the product is successful, its distribution is likely to expand in the forecast period. Similarly, Label 5 launched cocktail iced sticks in France. If successful, the product is likely to appear in the Belgian market in the forecast period.

## CATEGORY DATA

Table 49 Sales of RTDS by Category: Total Volume 2013-2018

'000 litres	2013	2014	2015	2016	2017	2018
Malt-based RTDs	-	-	-	-	-	-
Spirit-based RTDs	4,237.2	4,267.3	4,219.0	3,953.6	3,783.8	3,674.7
Wine-based RTDs	657.0	659.2	656.1	628.4	610.2	595.2
Other RTDs	-	-	-	-	-	-
RTDs	4,894.1	4,926.5	4,875.1	4,582.0	4,394.0	4,269.9

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

**Table 50 Sales of RTDS by Category: Total Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Malt-based RTDs	-	-	-	-	-	-
Spirit-based RTDs	40.8	41.2	41.4	41.1	44.1	43.3
Wine-based RTDs	2.1	2.2	2.2	2.2	2.2	2.2
Other RTDs	-	-	-	-	-	-
RTDs	43.0	43.4	43.5	43.3	46.4	45.6

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

**Table 51 Sales of RTDS by Category: % Total Volume Growth 2013-2018**

% total volume growth	2017/18	2013-18 CAGR	2013/18 Total
Malt-based RTDs	-	-	-
Spirit-based RTDs	-2.9	-2.8	-13.3
Wine-based RTDs	-2.5	-2.0	-9.4
Other RTDs	-	-	-
RTDs	-2.8	-2.7	-12.8

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

**Table 52 Sales of RTDS by Category: % Total Value Growth 2013-2018**

% local currency, current value growth	2017/18	2013-18 CAGR	2013/18 Total
Malt-based RTDs	-	-	-
Spirit-based RTDs	-1.8	1.2	6.2
Wine-based RTDs	-0.6	0.8	4.2
Other RTDs	-	-	-
RTDs	-1.7	1.2	6.1

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

**Table 53 Sales of RTDS by Off-trade vs On-trade: Volume 2013-2018**

'000 litres	2013	2014	2015	2016	2017	2018
Off-trade	3,799.3	3,874.6	3,873.2	3,647.8	3,500.7	3,414.9
On-trade	1,094.8	1,051.9	1,001.8	934.2	893.3	855.1
Total	4,894.1	4,926.5	4,875.1	4,582.0	4,394.0	4,269.9

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

**Table 54 Sales of RTDS by Off-trade vs On-trade: Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Off-trade	21.3	22.1	22.8	22.7	24.9	24.6
On-trade	21.7	21.3	20.8	20.5	21.4	21.0
Total	43.0	43.4	43.5	43.3	46.4	45.6

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

**Table 55 Sales of RTDS by Off-trade vs On-trade: % Volume Growth 2013-2018**

% volume growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	-2.5	-2.1	-10.1
On-trade	-4.3	-4.8	-21.9
Total	-2.8	-2.7	-12.8

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

**Table 56 Sales of RTDS by Off-trade vs On-trade: % Value Growth 2013-2018**

% constant value growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	-1.3	2.9	15.6
On-trade	-2.2	-0.7	-3.3
Total	-1.7	1.2	6.1

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

**Table 57 GBO Company Shares of RTDS: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Bacardi & Co Ltd	41.2	39.6	39.6	39.2	39.1
Diageo Plc	21.8	22.4	21.8	22.7	23.5
J García Carrión SA	3.2	3.4	3.5	4.0	3.9
Bodegas y Bebidas SA (Grupo)	2.7	2.7	2.6	2.9	3.1
Brown-Forman Corp	-	1.3	1.3	1.4	1.4
Campari Milano SpA, Davide	0.1	0.2	0.3	0.5	0.9
La Martiniquaise SVS	0.8	0.7	0.7	0.7	0.8
Rémy Cointreau Group	0.9	0.9	0.9	0.7	0.6
Puerto Galero	0.7	0.4	0.3	-	-
Private Label	22.8	22.4	22.3	22.7	22.9
Others	5.9	6.0	6.7	5.3	3.9
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 58 NBO Company Shares of RTDS: % Total Volume 2014-2018

% total volume Company	2014	2015	2016	2017	2018
Bacardi Martini Belgium SA	41.2	40.9	40.9	40.6	40.4
Diageo Belgium NV SA	21.8	22.4	21.9	22.7	23.6
Carrefour Belgium SA/NV	4.9	4.9	4.8	4.9	4.8
Delhaize 'Le Lion' SA	4.2	4.2	4.2	4.2	4.3
J García Carrión SA	3.2	3.4	3.5	4.0	3.9
Etn Franz Colruyt NV	3.5	3.5	3.4	3.4	3.4
Bodegas AGE SA	2.7	2.7	2.6	2.9	3.1
MCS NV SA	0.1	0.2	0.3	0.5	0.9
Bruggeman NV	0.8	0.7	0.7	0.7	0.8
Maxxium Belgium NV SA	0.9	0.9	0.9	0.8	0.6
Puerto Galero	0.7	0.4	0.3	-	-
Other Private Label	10.1	9.9	9.8	10.1	10.3
Others	5.9	6.0	6.7	5.2	3.8
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 59 LBN Brand Shares of RTDS: % Total Volume 2015-2018

% total volume Brand (Global Brand Owner)	Company	2015	2016	2017	2018
William Lawson Cola (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	13.3	13.6	13.5	13.5
J&B Cola (Diageo Plc)	Diageo Belgium NV SA	9.3	9.3	9.9	10.2
Bacardi & Cola (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	7.4	7.5	7.4	7.6
Carrefour (Private Label)	Carrefour Belgium SA/NV	4.9	4.8	4.9	4.8
Gordon's & Tonic (Diageo Plc)	Diageo Belgium NV SA	3.9	4.1	4.3	4.5
Delhaize (Private Label)	Delhaize 'Le Lion' SA	4.2	4.2	4.2	4.3
Bacardi Mojito (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	4.1	4.0	4.0	4.0
Smirnoff Ice (Diageo Plc)	Diageo Belgium NV SA	4.0	3.8	3.6	3.8
Colruyt (Private Label)	Etn Franz Colruyt NV	3.5	3.4	3.4	3.4
Sangria Siesta	J García Carrión SA	1.9	2.0	2.5	2.8
Other Private Label (Private Label)	Other Private Label	9.9	9.8	10.1	10.3
Others	Others	33.7	33.4	32.0	30.7
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 60 Forecast Sales of RTDS by Category: Total Volume 2018-2023

'000 litres

	2018	2019	2020	2021	2022	2023
Malt-based RTDs	-	-	-	-	-	-
Spirit-based RTDs	3,674.7	3,591.5	3,530.7	3,482.5	3,441.3	3,325.2
Wine-based RTDs	595.2	582.2	572.1	563.5	556.1	550.5
Other RTDs	-	-	-	-	-	-
RTDs	4,269.9	4,173.6	4,102.8	4,046.0	3,997.3	3,875.6

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

**Table 61 Forecast Sales of RTDS by Category: Total Value 2018-2023**

EUR million	2018	2019	2020	2021	2022	2023
Malt-based RTDs	-	-	-	-	-	-
Spirit-based RTDs	43.3	42.6	42.1	41.7	41.3	40.3
Wine-based RTDs	2.2	2.2	2.2	2.1	2.1	2.1
Other RTDs	-	-	-	-	-	-
RTDs	45.6	44.8	44.3	43.9	43.5	42.4

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

**Table 62 Forecast Sales of RTDS by Category: % Total Volume Growth 2018-2023**

% total volume growth	2018/19	2018-23 CAGR	2018/23 Total
Malt-based RTDs	-	-	-
Spirit-based RTDs	-2.3	-2.0	-9.5
Wine-based RTDs	-2.2	-1.5	-7.5
Other RTDs	-	-	-
RTDs	-2.3	-1.9	-9.2

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

**Table 63 Forecast Sales of RTDS by Category: % Total Value Growth 2018-2023**

% local currency, constant value growth	2018/2019	2018-23 CAGR	2018/23 Total
Malt-based RTDs	-	-	-
Spirit-based RTDs	-1.7	-1.5	-7.0
Wine-based RTDs	-1.5	-1.2	-6.0
Other RTDs	-	-	-
RTDs	-1.6	-1.4	-7.0

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

# SPIRITS IN BELGIUM - CATEGORY ANALYSIS

## HEADLINES

- Total volume sales decrease by 5% in 2018 to reach 26.3 million litres
- Cross-border trade and premiumisation impact sales
- Dark rum sees the highest total volume sales growth of 4% in 2018
- The average unit price rises by 3% in total current value terms in 2018
- Diageo Belgium leads in with a 24% total volume share
- A negative 2% total volume CAGR is expected over the forecast period to reach 23.5 million litres in 2023

## PROSPECTS

### Volumes Sales Continue To Be Affected by the Legislative Environment

The effects of the 2016 rise in excise duties on alcoholic drinks remain visible in spirits. In 2018, the category saw a further decline in total volume and current value terms. Thus, the gap between actual alcoholic drinks consumption and purchases increased. Unlike in neighbouring countries, the actual consumption of alcoholic drinks is increasing in Belgium. Nevertheless, quick trips to neighbouring countries to buy alcohol are more frequent. Consumers buy relatively large quantities of economy and mid-priced alcohol across the border. However, purchasers of premium alcoholic drinks in smaller quantities do not bother going abroad. Therefore, one can see a premiumisation trend in spirits in Belgium.

### Premiumisation Creates Value Potential

Premiumisation allowed the spirits category to suffer a slower decline in total value sales, compared with total volume sales, in 2018. In the forecast period, premiumisation is likely to remain the only way for spirits manufacturers to grow value sales. While likely to slow, further volume sales decline is expected. Dark rum, single malt Scotch whisky and English gin have benefited most from the premiumisation trend, and they retain some growth potential for the forecast period. Indeed, the "noble" image of these spirits is likely to convince consumers. In addition, bitters is set to see further total volume growth in the forecast period, while vodka, white rum and brandy are expected to decline further as they struggle to impose a premium image.

### Alcohol-free and Lower Abv Spirits Perform Well

As Belgians try to lower their alcohol consumption, the alcohol-free trend is reaching spirits. After Seedlip, an alcohol-free gin distributed in Belgium by Jet Import, Diageo, the leading player in spirits, launched an alcohol-free version of Gordon's Gin & Tonic in 2018. Increasing health consciousness is expected to see alcohol-free versions penetrate other spirits categories in the forecast period. However, legislation might halt the growth of these spirits. Unlike non-alcoholic beer, spirit-like drinks without alcohol cannot be referred to in the same terms by law.

Demand for lower abv spirits can also be observed in Belgium. This evolution is supported by spirits manufacturers, which have tended to reduce the abv content of their drinks, without

altering the taste, in order to reduce the tax imposed on their products. Moreover, consumers are looking for lower abv drinks as part of their more moderate consumption needs. These trends are set to continue in the forecast period.

## COMPETITIVE LANDSCAPE

### Diageo Leads As Smaller Companies Show Dynamism

The leading player, Diageo Belgium, decided to halt its coupon strategy adopted after the excise rise in 2016. Instead, it moved away from alcoholic drinks shelves and increased its presence in innovative places. For instance, shoppers can find a spirits display at entertainment areas in hypermarkets. Diageo's attempts to recruit new consumers "outside the shelf" slowed its total volume sales decrease in 2018. Meanwhile, Diageo and its closest challengers, Pernod Ricard Belgium and Bacardi Martini Belgium, all benefited from the performance of dark rum.

However, smaller and local players tended to see slower declines than big multinationals towards the end of the review period. Importers like Cinoco and Alcobrands Belux used their flexibility and freedom to react quickly to a declining category. Furthermore, with premiumisation, some consumers are turning away from supermarkets to specialist wholesalers like Cinoco. Moreover, big players focus on price promotions, while local players like Bruggeman continue to reach out to consumer via marketing campaigns.

### Premium Innovations Are Crucial for the Forecast Period

The Belgian spirits consumer is looking for more premium products. While English gin, which was a growth driver, saw volume sales decline, premium English gin continued to see growth. Therefore, further premium innovations, such as botanical or fruit flavourings, are likely to continue to create value growth opportunities for English gin manufacturers. The launch of Japanese Roku Gin distilled with traditional herbs evinces the premiumisation in the category. Moreover, dark and premium rums are expected to enjoy success over the forecast period. Manufacturers have invested to make dark rum a top-of-mind spirit suitable for mixology. Premiumisation also affords opportunities to smaller local players like Distillerie Radermacher, which launched 1836 (organic barrel aged rum).

The trend towards mixology informs innovation in spirits, as cocktail bars are very successful. As the second Brussels Cocktail Week took place in 2018, spirits manufacturers offered products suitable for cocktails. Nevertheless, "cocktail fever" is most visible in the on-trade channel, with home-made cocktails confined to a few popular recipes. In addition, "Spritz fever" is likely to remain active in the short to medium term.

### Mid-priced Positioning Loses Out

With discounters being very aggressive on prices, premiumisation via regular and specialist retailers and the generalisation of cross-border sales, the mid-priced segment suffered most in spirits in 2018. Standard spirits manufacturers increasingly have to make a choice between volume or quality. However, as discounters' spirits manufacturers seem well established and their margins decreasing, it will be easier for standard spirits producers to focus on quality and the consumer experience. This strategy is also increasingly common in the on-trade channel, which is moving towards fewer establishments offering better service and higher-quality products to create value sales at higher price points.

## 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, which is indexed as 100%. The benchmark brand will be a mid-priced brand.

#### Summary 4 Benchmark Brands 2018

Category	Brand name	Positioning
Vodka	Absolut Vodka	Premium
Gin	Bombay Sapphire	Premium
Other blended Scotch whisky	Johnnie Walker Red Label	Mid-priced
Dark rum	Captain Morgan	Mid-priced
White rum	Bacardi	Mid-Priced

Source: Euromonitor International from trade interviews, store checks

## CATEGORY DATA

Table 64 Sales of Spirits by Category: Total Volume 2013-2018

'000 litres	2013	2014	2015	2016	2017	2018
Brandy and Cognac	1,542.6	1,488.7	1,438.7	1,077.4	918.8	831.0
- Brandy	545.4	512.0	485.6	351.4	291.1	262.0
- Cognac	997.2	976.8	953.1	726.0	627.7	568.9
Liqueurs	9,989.0	9,808.8	9,677.5	7,725.4	6,937.7	6,498.2
- Bitters	1,830.6	1,843.3	1,858.2	1,645.1	1,610.7	1,619.0
- Cream-based Liqueurs	2,221.3	2,146.5	2,082.1	1,568.8	1,327.8	1,185.2
- Other Liqueurs	5,937.1	5,819.0	5,737.2	4,511.5	3,999.2	3,694.0
Rum	3,211.7	3,204.7	3,182.7	2,695.5	2,497.6	2,428.6
- Dark Rum	742.3	749.1	755.4	691.6	669.6	697.1
- White Rum	2,469.4	2,455.6	2,427.3	2,003.9	1,828.0	1,731.5
Tequila (and Mezcal)	225.6	218.7	209.5	181.1	171.1	167.1
Whiskies	8,096.8	7,987.6	7,894.8	6,639.0	6,166.9	5,908.2
- Bourbon/Other US Whiskey	442.4	440.5	441.6	346.1	294.6	265.1
- Canadian Whiskey	0.8	0.8	0.6	0.3	0.3	-
- Irish Whiskey	715.6	703.2	696.5	620.6	587.6	574.8
- Japanese Whiskey	-	-	-	-	-	0.2
- Blended Scotch Whisky	5,782.0	5,689.3	5,603.6	4,622.0	4,253.8	4,034.7
- Single Grain Scotch Whisky	-	-	-	-	-	-
- Single Malt Scotch Whisky	1,155.9	1,153.8	1,152.5	1,050.0	1,030.7	1,033.4
- Other Whiskies	-	-	-	-	-	-
White Spirits	11,149.5	11,173.6	11,189.2	9,673.2	9,046.0	8,673.9
- Gin	6,429.4	6,614.3	6,735.3	5,972.9	5,723.0	5,575.5
- Vodka	4,720.1	4,559.2	4,453.9	3,700.3	3,323.0	3,098.4



Other Spirits	2,990.4	2,955.3	2,928.0	2,218.2	1,938.2	1,820.7
Spirits	37,205.6	36,837.4	36,520.4	30,209.8	27,676.3	26,327.8

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

**Table 65 Sales of Spirits by Category: Total Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Brandy and Cognac	55.7	55.3	55.2	45.0	39.6	36.7
- Brandy	12.4	11.8	11.6	9.5	8.0	7.3
- Cognac	43.3	43.4	43.5	35.6	31.6	29.5
Liqueurs	255.6	255.9	262.3	232.2	214.2	205.2
- Bitters	37.0	38.3	40.9	41.4	41.6	42.7
- Cream-based Liqueurs	56.6	55.6	56.4	47.1	41.2	37.8
- Other Liqueurs	162.1	162.0	165.1	143.7	131.5	124.8
Rum	124.5	127.3	131.1	120.4	115.0	113.4
- Dark Rum	24.9	25.5	26.4	26.0	25.7	27.0
- White Rum	99.6	101.8	104.7	94.4	89.2	86.3
Tequila (and Mezcal)	8.1	8.1	8.2	7.7	7.5	7.5
Whiskies	379.5	385.4	393.7	368.4	355.5	350.9
- Bourbon/Other US Whiskey	16.8	17.3	18.0	16.3	14.3	13.5
- Canadian Whisky	0.0	0.0	0.0	0.0	0.0	-
- Irish Whiskey	35.7	36.0	37.0	37.0	36.3	36.3
- Japanese Whisky	-	-	-	-	-	0.0
- Blended Scotch Whisky	235.4	237.8	240.3	218.8	208.3	202.8
- Single Grain Scotch Whisky	-	-	-	-	-	-
- Single Malt Scotch Whisky	91.6	94.4	98.3	96.4	96.5	98.3
- Other Whiskies	-	-	-	-	-	-
White Spirits	292.1	304.8	322.5	319.5	307.1	299.9
- Gin	132.4	146.1	161.6	170.9	170.2	170.8
- Vodka	159.6	158.7	160.9	148.5	136.9	129.1
Other Spirits	75.2	75.8	76.6	62.9	55.8	53.2
Spirits	1,190.6	1,212.6	1,249.6	1,156.2	1,094.7	1,066.9

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 Volume Growth 2013-2018**

% total volume growth	2017/18	2013-18 CAGR	2013/18 Total
Brandy and Cognac	-9.6	-11.6	-46.1
- Brandy	-10.0	-13.6	-52.0
- Cognac	-9.4	-10.6	-42.9
Liqueurs	-6.3	-8.2	-34.9
- Bitters	0.5	-2.4	-11.6
- Cream-based Liqueurs	-10.7	-11.8	-46.6
- Other Liqueurs	-7.6	-9.1	-37.8
Rum	-2.8	-5.4	-24.4
- Dark Rum	4.1	-1.2	-6.1
- White Rum	-5.3	-6.9	-29.9
Tequila (and Mezcal)	-2.3	-5.8	-25.9

Whiskies	-4.2	-6.1	-27.0
- Bourbon/Other US Whiskey	-10.0	-9.7	-40.1
- Canadian Whisky	-	-	-
- Irish Whiskey	-2.2	-4.3	-19.7
- Japanese Whisky	-	-	-
- Blended Scotch Whisky	-5.1	-6.9	-30.2
- Single Grain Scotch Whisky	-	-	-
- Single Malt Scotch Whisky	0.3	-2.2	-10.6
- Other Whiskies	-	-	-
White Spirits	-4.1	-4.9	-22.2
- Gin	-2.6	-2.8	-13.3
- Vodka	-6.8	-8.1	-34.4
Other Spirits	-6.1	-9.4	-39.1
Spirits	-4.9	-6.7	-29.2

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 Value Growth 2013-2018**

% local currency, current value growth

	2017/18	2013-18 CAGR	2013/18 Total
Brandy and Cognac	-7.3	-8.0	-34.1
- Brandy	-8.9	-10.1	-41.2
- Cognac	-6.9	-7.4	-32.1
Liqueurs	-4.2	-4.3	-19.7
- Bitters	2.6	2.9	15.4
- Cream-based Liqueurs	-8.1	-7.7	-33.1
- Other Liqueurs	-5.1	-5.1	-23.0
Rum	-1.4	-1.9	-9.0
- Dark Rum	4.9	1.7	8.5
- White Rum	-3.2	-2.8	-13.3
Tequila (and Mezcal)	0.0	-1.3	-6.5
Whiskies	-1.3	-1.6	-7.5
- Bourbon/Other US Whiskey	-6.0	-4.4	-20.0
- Canadian Whisky	-	-	-
- Irish Whiskey	0.0	0.3	1.6
- Japanese Whisky	-	-	-
- Blended Scotch Whisky	-2.7	-2.9	-13.8
- Single Grain Scotch Whisky	-	-	-
- Single Malt Scotch Whisky	1.9	1.4	7.4
- Other Whiskies	-	-	-
White Spirits	-2.3	0.5	2.7
- Gin	0.4	5.2	29.0
- Vodka	-5.7	-4.1	-19.1
Other Spirits	-4.7	-6.7	-29.3
Spirits	-2.5	-2.2	-10.4

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

**Table 68 Sales of Spirits by Off-trade vs On-trade: Volume 2013-2018**

'000 litres	2013	2014	2015	2016	2017	2018
Off-trade	29,495.7	29,226.3	29,006.7	23,815.6	21,693.8	20,601.7

On-trade	7,709.9	7,611.0	7,513.7	6,394.2	5,982.6	5,726.0
Total	37,205.6	36,837.4	36,520.4	30,209.8	27,676.3	26,327.8

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: Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Off-trade	580.1	590.2	611.6	578.8	539.1	521.6
On-trade	610.5	622.4	638.0	577.4	555.6	545.3
Total	1,190.6	1,212.6	1,249.6	1,156.2	1,094.7	1,066.9

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: % Volume Growth 2013-2018**

% volume growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	-5.0	-6.9	-30.2
On-trade	-4.3	-5.8	-25.7
Total	-4.9	-6.7	-29.2

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: % Value Growth 2013-2018**

% constant value growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	-3.2	-2.1	-10.1
On-trade	-1.9	-2.2	-10.7
Total	-2.5	-2.2	-10.4

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

**Table 72 Sales of Dark Rum by Price Platform: % Total Volume 2013-2018**

% total volume	2013	2014	2015	2016	2017	2018
Prestige	0.6	0.4	0.2	0.3	0.2	0.2
Ultra Premium	0.7	0.4	0.3	0.2	0.2	0.5
Super Premium	1.9	2.1	1.6	1.4	1.5	1.5
Premium	21.3	20.6	19.0	18.0	17.9	17.0
Standard	66.1	68.7	72.9	74.0	74.3	75.6
Economy	9.4	7.8	6.0	6.1	5.9	5.1
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

Note: '-' indicates data not available

**Table 73 Sales of White Rum by Price Platform: % Total Volume 2013-2018**

% total volume	2013	2014	2015	2016	2017	2018
Prestige	0.4	0.4	0.4	0.4	0.4	0.4
Ultra Premium	0.5	0.5	0.5	0.3	0.3	0.3
Super Premium	0.9	0.9	0.8	0.5	0.5	0.5
Premium	3.2	3.2	3.2	2.4	2.2	2.3
Standard	82.5	82.6	82.8	83.9	84.4	84.9
Economy	12.5	12.3	12.2	12.4	12.2	11.8
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

Note: '-' indicates data not available

**Table 74 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2013-2018**

% total volume	2013	2014	2015	2016	2017	2018
Prestige	0.0	0.1	0.1	0.2	0.3	0.3
Ultra Premium	0.0	0.2	0.2	0.2	0.2	0.3
Super Premium	1.0	1.3	1.1	1.3	1.6	1.8
Premium	9.0	10.1	10.1	10.3	11.9	9.8
Standard	80.0	78.5	79.0	78.5	76.5	79.5
Economy	9.9	9.8	9.5	9.5	9.4	8.4
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 75 Sales of English Gin by Price Platform: % Total Volume 2013-2018**

% total volume	2013	2014	2015	2016	2017	2018
Prestige	0.9	0.6	0.8	1.0	1.3	1.4
Ultra Premium	1.2	0.9	1.0	0.9	1.0	1.1
Super Premium	9.0	11.4	12.9	15.4	16.1	16.3
Premium	23.2	27.7	33.5	36.1	36.5	36.9
Standard	43.8	42.2	40.4	37.3	35.7	34.8
Economy	21.9	17.2	11.4	9.3	9.3	9.6
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 Vodka by Price Platform: % Total Volume 2013-2018**

% total volume	2013	2014	2015	2016	2017	2018
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Prestige	0.3	0.2	0.1	0.2	0.2	0.2
Ultra Premium	0.4	0.2	0.2	0.2	0.2	0.2
Super Premium	1.8	3.8	5.0	5.8	6.8	7.3
Premium	17.9	17.4	17.5	16.6	16.0	15.3
Standard	64.2	64.0	63.6	62.4	62.0	62.0
Economy	15.4	14.4	13.6	14.8	14.7	15.0
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 77 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2013-2018**

% total volume	2013	2014	2015	2016	2017	2018
Flavoured Vodka	5.2	5.1	5.1	5.1	5.0	5.0
Non-Flavoured Vodka	94.8	94.9	94.9	94.9	95.0	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 78 GBO Company Shares of Spirits: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Diageo Plc	23.3	23.4	23.2	23.6	23.9
Bacardi & Co Ltd	11.0	11.9	13.1	13.3	13.5
Pernod Ricard Groupe	11.5	11.6	11.4	11.5	11.5
La Martiniquaise SVS	6.1	6.2	5.7	5.6	5.4
Campari Milano SpA, Davide	3.8	3.8	4.7	4.9	5.0
Rémy Cointreau Group	3.1	3.3	3.2	3.1	3.0
Lucas Bols BV	3.4	3.2	3.1	3.0	2.8
Filliers Graanstokerij NV	3.0	2.9	2.7	2.6	2.5
William Grant & Sons Ltd	1.6	1.7	2.0	1.9	2.0
Illva Saronno SpA	1.8	1.7	1.6	1.6	1.6
Mast-Jägermeister SE	0.9	0.9	1.0	1.1	1.1
Marie Brizard & Roger International SAS	-	0.8	0.8	0.8	0.8
Wenneker Distillery BV	1.0	1.0	0.8	0.8	0.8
Domaine Mandarine Napoleon	0.7	0.7	0.7	0.7	0.7
Brown-Forman Corp	0.8	0.8	0.8	0.7	0.7
Suntory Holdings Ltd	0.5	0.6	0.7	0.7	0.7
Distell Group Ltd	0.7	0.7	0.6	0.6	0.6
Mangaroca International SA	0.6	0.6	0.6	0.5	0.5
Russian Standard Corp	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
Diego Zamora SA	0.3	0.3	0.3	0.3	0.3
Edrington Group	0.5	0.4	0.4	0.4	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	0.2
Socralvi SA	0.1	0.2	0.2	0.2	0.2
La Martiniquaise- Bardinet Groupe	-	-	-	-	0.2
Distillerie de Biercée SA	-	-	-	0.1	0.2
Elephant Gin Ltd	0.0	0.1	0.1	0.1	0.1
Destilería Sierra Unidas SA de CV	0.1	0.1	0.1	0.1	0.1
Grands Vins JC Boisset	0.1	0.2	0.2	0.1	0.1
Private Label	11.3	10.5	10.3	9.9	9.9
Others	12.4	11.4	10.2	10.3	10.2
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 79 NBO Company Shares of Spirits: % Total Volume 2014-2018

% total volume Company	2014	2015	2016	2017	2018
Diageo Belgium NV SA	23.4	23.5	23.3	23.7	24.0
Pernod Ricard Belgium	14.3	14.3	14.1	14.1	14.0
Bacardi Martini Belgium SA	11.6	12.5	13.6	13.9	14.0
Rémy Cointreau Belgium	10.0	10.0	9.8	9.6	9.3
Bruggeman NV	6.1	6.2	5.6	5.5	5.3
MCS NV SA	3.6	3.5	3.9	4.1	4.2
Filliers Graanstokerij NV	3.0	2.9	2.7	2.6	2.5
Etn Franz Colruyt NV	2.2	2.1	2.1	2.0	2.1
Cinoco SA	0.8	1.6	1.9	1.9	1.9
Delhaize 'Le Lion' SA	1.9	1.7	1.7	1.6	1.6
Carrefour Belgium SA/NV	1.7	1.7	1.6	1.6	1.4
Distillerie Smeets NV	1.0	1.0	0.8	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	0.5	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	0.3
Branca Distillerie Srl, Flli	0.2	0.2	0.2	0.2	0.2
UB Group	0.2	0.2	0.2	0.2	0.2
Socralvi SA	0.1	0.2	0.2	0.2	0.2
Brown-Forman Corp	0.2	0.1	0.1	0.1	0.1
Illva Saronno SpA	0.3	0.1	0.1	0.1	0.1
Bruichladdich Distillery Co Ltd	-	0.0	0.1	0.1	0.1
Cristall Distillery	0.3	0.2	0.1	0.1	0.1
Brugal & Co	0.1	0.1	0.1	0.1	0.1
Promalvin SA	0.2	0.2	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	0.0	0.0
Gelas SA	0.1	0.0	-	-	-
Other Private Label	5.5	5.1	5.0	4.6	4.8
Others	10.6	10.0	9.8	10.1	10.2
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 80 LBN Brand Shares of Spirits: % Total Volume 2015-2018**

% total volume Brand (Global Brand Owner)	Company	2015	2016	2017	2018
Bacardi (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	4.0	4.0	4.1	4.1
J&B Rare (Diageo Plc)	Diageo Belgium NV SA	3.9	3.7	3.8	4.0
Johnnie Walker Red Label (Diageo Plc)	Diageo Belgium NV SA	3.7	3.7	3.7	3.6
Gordon's (Diageo Plc)	Diageo Belgium NV SA	2.9	3.2	3.4	3.4
Smirnoff (Diageo Plc)	Diageo Belgium NV SA	4.1	3.6	3.5	3.4
Peterman (La Martiniquaise SVS)	Bruggeman NV	3.9	3.3	3.2	3.1
Bombay Sapphire (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	1.9	2.5	2.7	2.8
William Lawson's (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	2.5	2.6	2.6	2.6
Ricard (Pernod Ricard Groupe)	Pernod Ricard Belgium	3.1	2.4	2.3	2.3
Picon (Diageo Plc)	Diageo Belgium NV SA	2.1	2.2	2.4	2.2
Other Private Label (Private Label)	Other Private Label	5.1	5.0	4.6	4.8
Others	Others	62.9	63.8	63.9	63.8
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 81 Forecast Sales of Spirits by Category: Total Volume 2018-2023**

'000 litres	2018	2019	2020	2021	2022	2023
Brandy and Cognac	831.0	759.4	707.4	667.8	634.8	604.9
- Brandy	262.0	229.6	205.0	185.9	171.0	157.5
- Cognac	568.9	529.8	502.4	481.9	463.8	447.4
Liqueurs	6,498.2	6,192.0	5,956.6	5,762.8	5,608.3	5,478.1
- Bitters	1,619.0	1,632.0	1,646.5	1,666.7	1,689.8	1,717.4
- Cream-based Liqueurs	1,185.2	1,095.8	1,035.2	987.0	947.6	912.4
- Other Liqueurs	3,694.0	3,464.2	3,274.8	3,109.1	2,970.8	2,848.3
Rum	2,428.6	2,381.5	2,345.5	2,316.6	2,291.3	2,268.6
- Dark Rum	697.1	720.0	739.8	757.1	772.2	785.4
- White Rum	1,731.5	1,661.5	1,605.7	1,559.5	1,519.1	1,483.1
Tequila (and Mezcal)	167.1	165.2	164.2	163.9	164.3	164.9
Whiskies	5,908.2	5,741.3	5,630.1	5,555.6	5,506.5	5,485.8
- Bourbon/Other US Whiskey	265.1	247.1	236.0	230.1	225.5	221.7
- Canadian Whiskey	-	-	-	-	-	-
- Irish Whiskey	574.8	564.3	556.1	549.3	543.6	540.0
- Japanese Whiskey	0.2	0.2	0.2	0.2	0.2	0.2
- Blended Scotch Whisky	4,034.7	3,891.7	3,794.0	3,724.3	3,674.4	3,646.7
- Single Grain Scotch Whisky	-	-	-	-	-	-

- Single Malt Scotch Whisky	1,033.4	1,038.1	1,043.7	1,051.8	1,062.8	1,077.2
- Other Whiskies	-	-	-	-	-	-
White Spirits	8,673.9	8,417.0	8,225.5	8,094.6	7,999.3	7,920.4
- Gin	5,575.5	5,450.7	5,343.7	5,261.6	5,192.2	5,121.5
- Vodka	3,098.4	2,966.3	2,881.7	2,833.0	2,807.2	2,798.9
Other Spirits	1,820.7	1,739.9	1,684.4	1,641.0	1,602.9	1,574.1
Spirits	26,327.8	25,396.5	24,713.6	24,202.4	23,807.4	23,496.7

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

Table 82 Forecast Sales of Spirits by Category: Total Value 2018-2023

EUR million	2018	2019	2020	2021	2022	2023
Brandy and Cognac	36.7	34.2	32.2	30.8	29.6	28.6
- Brandy	7.3	6.4	5.8	5.2	4.8	4.5
- Cognac	29.5	27.7	26.5	25.5	24.8	24.1
Liqueurs	205.2	197.4	190.7	185.3	181.3	178.0
- Bitters	42.7	43.5	44.2	45.0	45.9	46.9
- Cream-based Liqueurs	37.8	35.5	33.9	32.5	31.4	30.5
- Other Liqueurs	124.8	118.4	112.6	107.8	103.9	100.6
Rum	113.4	112.1	111.3	110.5	109.9	109.6
- Dark Rum	27.0	27.5	28.1	28.5	28.9	29.4
- White Rum	86.3	84.6	83.2	82.0	81.0	80.3
Tequila (and Mezcal)	7.5	7.5	7.5	7.6	7.7	7.8
Whiskies	350.9	344.5	339.7	336.7	335.0	334.9
- Bourbon/Other US Whiskey	13.5	12.8	12.4	12.2	12.1	12.0
- Canadian Whisky	-	-	-	-	-	-
- Irish Whiskey	36.3	36.0	35.7	35.6	35.5	35.6
- Japanese Whisky	0.0	0.0	0.0	0.0	0.0	0.0
- Blended Scotch Whisky	202.8	196.3	191.2	187.2	184.0	182.0
- Single Grain Scotch Whisky	-	-	-	-	-	-
- Single Malt Scotch Whisky	98.3	99.3	100.3	101.6	103.3	105.4
- Other Whiskies	-	-	-	-	-	-
White Spirits	299.9	293.2	287.8	284.1	281.1	278.5
- Gin	170.8	169.1	167.4	166.0	164.5	162.7
- Vodka	129.1	124.0	120.4	118.0	116.5	115.8
Other Spirits	53.2	50.9	49.0	47.7	46.6	45.8
Spirits	1,066.9	1,039.7	1,018.3	1,002.6	991.1	983.2

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

Table 83 Forecast Sales of Spirits by Category: % Total Volume Growth 2018-2023

% total volume growth	2018/19	2018-23 CAGR	2018/23 Total
Brandy and Cognac	-8.6	-6.2	-27.2
- Brandy	-12.4	-9.7	-39.9
- Cognac	-6.9	-4.7	-21.4
Liqueurs	-4.7	-3.4	-15.7
- Bitters	0.8	1.2	6.1



- Cream-based Liqueurs	-7.5	-5.1	-23.0
- Other Liqueurs	-6.2	-5.1	-22.9
Rum	-1.9	-1.4	-6.6
- Dark Rum	3.3	2.4	12.7
- White Rum	-4.0	-3.0	-14.3
Tequila (and Mezcal)	-1.1	-0.3	-1.4
Whiskies	-2.8	-1.5	-7.1
- Bourbon/Other US Whiskey	-6.8	-3.5	-16.4
- Canadian Whisky	-	-	-
- Irish Whiskey	-1.8	-1.2	-6.1
- Japanese Whisky	1.8	1.3	6.9
- Blended Scotch Whisky	-3.5	-2.0	-9.6
- Single Grain Scotch Whisky	-	-	-
- Single Malt Scotch Whisky	0.5	0.8	4.2
- Other Whiskies	-	-	-
White Spirits	-3.0	-1.8	-8.7
- Gin	-2.2	-1.7	-8.1
- Vodka	-4.3	-2.0	-9.7
Other Spirits	-4.4	-2.9	-13.5
Spirits	-3.5	-2.2	-10.8

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

**Table 84 Forecast Sales of Spirits by Category: % Total Value Growth 2018-2023**

% local currency, constant value growth

	2018/2019	2018-23 CAGR	2018/23 Total
Brandy and Cognac	-7.0	-4.9	-22.1
- Brandy	-11.7	-9.3	-38.8
- Cognac	-5.8	-3.9	-18.0
Liqueurs	-3.8	-2.8	-13.3
- Bitters	1.9	1.9	10.0
- Cream-based Liqueurs	-6.0	-4.2	-19.4
- Other Liqueurs	-5.1	-4.2	-19.4
Rum	-1.1	-0.7	-3.3
- Dark Rum	1.8	1.7	8.7
- White Rum	-2.0	-1.5	-7.0
Tequila (and Mezcal)	-0.1	0.6	3.2
Whiskies	-1.8	-0.9	-4.5
- Bourbon/Other US Whiskey	-4.6	-2.3	-10.8
- Canadian Whisky	-	-	-
- Irish Whiskey	-0.7	-0.4	-1.9
- Japanese Whisky	2.4	2.4	12.7
- Blended Scotch Whisky	-3.2	-2.1	-10.3
- Single Grain Scotch Whisky	-	-	-
- Single Malt Scotch Whisky	1.0	1.4	7.1
- Other Whiskies	-	-	-
White Spirits	-2.3	-1.5	-7.1
- Gin	-1.0	-1.0	-4.7
- Vodka	-4.0	-2.2	-10.3
Other Spirits	-4.3	-2.9	-13.9
Spirits	-2.5	-1.6	-7.8

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



# WINE IN BELGIUM - CATEGORY ANALYSIS

## HEADLINES

- Total volume sales fall by 2% in 2018 to reach 297 million litres
- Competition from other alcoholic drinks remains the biggest threat
- Still rosé wine sees the highest total volume sales growth of 2% in 2018
- The average unit price rises by 2% in total current value terms in 2018
- Competitive landscape remains highly fragmented in 2018
- Wine is expected to see a negative 1% total volume CAGR over the forecast period to reach 283 million litres in 2023

## PROSPECTS

### Wine Sees New Volume Sales Decrease

Total volume sales continued to decrease in 2018, largely due to rising health consciousness and cross-border trade. Moreover, some types, such as port, sherry and, to a lesser extent, still light grape wine have an old-fashioned image and find it difficult to renew their consumer base. Meanwhile, vermouth's image and sales benefited from use in cocktails. In addition, premiumisation allows wine manufacturers to create value, while still light grape wine is commonly consumed with food. As Belgians desire healthier meals, volume sales are predicted to fall in the forecast period. However, as Belgians want to upgrade their wine experience, premiumisation will remain the key leverage to creating value.

### New Entrants in Wine

While more than one half of still light grape wine consumed in Belgium comes from France, more and more wines from other countries are entering the fray. It is increasingly common to find wines from other European or Latin American wine manufacturers. Some Chinese wines are also starting to appear. Belgium is also a growing wine producer. Very warm weather made 2018 an exceptional year for Belgian wine producers. Indeed, production nearly doubled compared to 2017. While some Belgian wines can be found in supermarkets, the business strategy of Belgian wine producers remains focused on premium distribution through specialist retailers.

### Low Abv and Organic Wines Enjoy Success

The alcohol-free trend was visible in wine. As Belgians aim for more responsible and healthier consumption, alcohol-free wines enjoy success. At the Megavino fair in Brussels in 2018, the biggest wine fair in Belgium, alcohol-free wine was very successful, increasing its popularity amongst wine professionals and connoisseurs. Thus, wider distribution and higher sales of alcohol-free wine are anticipated during the forecast period. The growth in popularity benefits the local manufacturer Orient Drink. A first-mover in alcohol-free wine, Orient Drink is capitalising on its large range of still light grape and sparkling wines under its Night Orient

brand. The company is also embracing the premium trend with the new Vendôme Mademoiselle range. With Vintense, Neobulles is also very active in the category.

Belgians are also turning to organic wines. While still niche, its distribution and popularity are increasing. According to specialists, organic wine consumption in Belgium could easily double if there is a sufficient supply. Moreover, some mobile tools, such as the Raisin app, help to raise awareness of natural and organic wines.

## COMPETITIVE LANDSCAPE

### Retailers Lead the Field

Retailers remain the leading wine distributors in Belgium, as they bottle most of the wine they sell. Etn Franz Colruyt led a highly fragmented landscape in total volume terms in 2018, followed by the wine specialist Delhaize 'Le Lion' and Carrefour Belgium. Meanwhile, the German discounters Aldi and gained small total volume share. In general, retailers sell an increasing share of their annual volume sales via wine fairs. In terms of packaging closures, some retailers are using plastic screw caps instead of traditional corks as a cheaper and more convenient option.

### Specialist Retailers Gain A Foothold

While a strong share of sales consist of wine directly bottled by leading retailers, more and more wine connoisseurs are finding their needs met in specialist wine shops, which import wines directly from producers. Indeed, as Belgians demand more premium wines, they are looking for less widely distributed upmarket brands. Thus, they are increasingly likely to seek out a specialist retailer in the forecast period.

### Sparkling Wine Sees Polarisation

The consumption of sparkling wine increased in 2018, supported by premium champagnes like Laurent-Perrier and Mumm. Meanwhile, cheaper prosecco brands, such as Riccadonna Prosecco, benefited from rising quality perceptions to perform well. Thus, the category is witnessing a level of price polarisation. This is expected to strengthen in the forecast period, as premium champagne is likely to replace standard champagne for special occasions, while value for money "other" sparkling wine is set to replace standard champagne for normal occasions or evening tipples.

## CATEGORY DATA

Table 85 Sales of Wine by Category: Total Volume 2013-2018

million litres	2013	2014	2015	2016	2017	2018
Fortified Wine and Vermouth	19.6	19.3	19.0	17.7	17.4	17.1
- Port	9.5	9.3	9.2	8.6	8.3	8.1
- Sherry	1.4	1.3	1.2	1.1	1.0	0.9
- Vermouth	8.8	8.6	8.6	8.1	8.1	8.1
- Other Fortified Wine	-	-	-	-	-	-
Non-Grape Wine	32.7	32.0	31.3	27.9	25.9	24.9
- Fruit Wine	0.2	0.2	0.1	0.1	0.0	-

- Sake	32.4	31.8	31.2	27.8	25.9	24.9
Sparkling Wine	29.0	31.5	33.7	32.3	32.1	32.2
- Champagne	5.9	6.2	6.3	5.9	5.9	5.9
- Other Sparkling Wine	23.2	25.3	27.5	26.4	26.2	26.2
Still Light Grape Wine	247.6	247.6	246.5	233.9	228.0	223.2
- Still Red Wine	125.4	123.5	121.7	114.1	110.2	106.5
- Still Rosé Wine	40.2	41.0	40.9	39.6	40.0	40.8
- Still White Wine	82.0	83.1	83.8	80.1	77.8	75.8
Wine	328.9	330.4	330.5	311.7	303.3	297.3

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

**Table 86 Sales of Wine by Category: Total Value 2013-2018**

EUR million	2013	2014	2015	2016	2017	2018
Fortified Wine and Vermouth	195.4	195.0	197.8	199.8	197.4	196.8
- Port	102.4	101.8	102.6	102.5	99.7	98.2
- Sherry	13.2	12.6	12.4	12.0	11.1	10.4
- Vermouth	79.8	80.6	82.8	85.3	86.5	88.2
- Other Fortified Wine	-	-	-	-	-	-
Non-Grape Wine	536.4	529.5	522.1	501.9	471.5	455.1
- Fruit Wine	1.0	0.9	0.8	0.5	0.4	-
- Sake	535.4	528.6	521.3	501.4	471.1	455.1
Sparkling Wine	510.3	568.6	618.1	656.7	664.2	671.1
- Champagne	258.0	291.5	305.8	317.0	322.4	326.0
- Other Sparkling Wine	252.2	277.1	312.2	339.8	341.7	345.2
Still Light Grape Wine	1,988.2	2,011.6	2,038.6	2,049.3	2,030.6	2,024.3
- Still Red Wine	1,133.3	1,134.0	1,141.4	1,126.2	1,112.3	1,100.3
- Still Rosé Wine	238.8	249.3	250.7	260.4	264.8	272.8
- Still White Wine	616.1	628.2	646.5	662.7	653.5	651.3
Wine	3,230.2	3,304.7	3,376.5	3,407.7	3,363.6	3,347.4

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 Volume Growth 2013-2018**

% total volume growth	2017/18	2013-18 CAGR	2013/18 Total
Fortified Wine and Vermouth	-1.5	-2.7	-12.9
- Port	-2.7	-3.2	-15.0
- Sherry	-7.4	-7.9	-33.6
- Vermouth	0.4	-1.5	-7.3
- Other Fortified Wine	-	-	-
Non-Grape Wine	-4.0	-5.3	-23.8
- Fruit Wine	-	-	-
- Sake	-3.9	-5.2	-23.3
Sparkling Wine	0.3	2.1	10.8
- Champagne	0.8	0.3	1.3
- Other Sparkling Wine	0.2	2.5	13.3
Still Light Grape Wine	-2.1	-2.1	-9.9
- Still Red Wine	-3.3	-3.2	-15.0
- Still Rosé Wine	2.0	0.3	1.5
- Still White Wine	-2.6	-1.6	-7.6

Wine	-2.0	-2.0	-9.6
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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 Value Growth 2013-2018**

% local currency, current value growth

	2017/18	2013-18 CAGR	2013/18 Total
Fortified Wine and Vermouth	-0.3	0.1	0.7
- Port	-1.6	-0.8	-4.1
- Sherry	-6.2	-4.6	-21.0
- Vermouth	2.0	2.0	10.5
- Other Fortified Wine	-	-	-
Non-Grape Wine	-3.5	-3.2	-15.2
- Fruit Wine	-	-	-
- Sake	-3.4	-3.2	-15.0
Sparkling Wine	1.0	5.6	31.5
- Champagne	1.1	4.8	26.3
- Other Sparkling Wine	1.0	6.5	36.8
Still Light Grape Wine	-0.3	0.4	1.8
- Still Red Wine	-1.1	-0.6	-2.9
- Still Rosé Wine	3.0	2.7	14.2
- Still White Wine	-0.3	1.1	5.7
Wine	-0.5	0.7	3.6

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

**Table 89 Sales of Wine by Off-trade vs On-trade: Volume 2013-2018**

million litres

	2013	2014	2015	2016	2017	2018
Off-trade	256.6	258.0	259.2	243.7	236.9	231.8
On-trade	72.3	72.3	71.3	68.0	66.4	65.5
Total	328.9	330.4	330.5	311.7	303.3	297.3

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: Value 2013-2018**

EUR million

	2013	2014	2015	2016	2017	2018
Off-trade	1,768.2	1,802.8	1,855.5	1,902.5	1,863.3	1,845.8
On-trade	1,462.1	1,501.9	1,521.0	1,505.3	1,500.3	1,501.6
Total	3,230.2	3,304.7	3,376.5	3,407.7	3,363.6	3,347.4

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: % Volume Growth 2013-2018**

% volume growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	-2.2	-2.0	-9.7
On-trade	-1.4	-2.0	-9.4
Total	-2.0	-2.0	-9.6

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: % Value Growth 2013-2018**

% constant value growth	2017/18	2013-18 CAGR	2013/18 Total
Off-trade	-0.9	0.9	4.4
On-trade	0.1	0.5	2.7
Total	-0.5	0.7	3.6

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

**Table 93 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2013-2018**

% off-trade	2013	2014	2015	2016	2017	2018
Under EUR3	29.0	29.0	29.0	29.0	29.1	29.2
EUR3.01 to EUR4.5	30.4	30.3	30.3	30.5	30.8	31.0
EUR4.51 to EUR6	29.6	29.6	29.6	29.1	28.6	28.0
EUR6.01 to EUR7.5	8.7	8.7	8.8	8.8	8.8	8.9
EUR7.51 to EUR12.5	1.9	1.9	2.0	2.0	2.1	2.1
EUR12.51 and above	0.4	0.4	0.4	0.4	0.6	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 94 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2013-2018**

% off-trade	2013	2014	2015	2016	2017	2018
Under EUR3	28.3	28.5	28.8	28.9	29.0	29.3
EUR3.01 to EUR3.99	30.3	30.0	29.6	29.7	29.8	29.8
EUR4 to EUR4.99	29.8	29.8	29.7	29.7	29.1	28.4
EUR5 to EUR7.49	9.8	9.8	9.9	9.7	10.0	10.2
EUR7.5 and above	2.0	2.0	2.1	2.0	2.1	2.3
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

**Table 95 Sales of Still White Wine by Price Segment: % Off-trade Volume 2013-2018**

% off-trade	2013	2014	2015	2016	2017	2018
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Under EUR3	26.1	26.0	26.1	26.2	26.3	26.4
EUR3.01 to EUR3.99	30.3	30.6	31.0	31.3	31.3	31.4
EUR4 to EUR4.99	30.4	30.6	30.8	30.3	30.0	29.7
EUR5 to EUR7.49	9.8	9.6	9.4	9.4	9.4	9.4
EUR7.5 to EUR12.49	3.1	2.8	2.5	2.6	2.7	2.8
EUR125 and above	0.4	0.3	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 96 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2013-2018**

% off-trade	2013	2014	2015	2016	2017	2018
Under EUR4.99	26.1	26.3	26.6	26.8	26.8	26.8
EUR5 to EUR6.49	24.6	24.8	24.8	24.9	23.9	22.0
EUR6.5 to EUR7.99	27.6	27.5	27.4	27.1	26.8	26.5
EUR8 to EUR9.99	15.3	15.3	15.1	15.2	15.3	15.3
EUR10 and above	6.3	6.2	6.0	6.1	6.2	6.2
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 GBO Company Shares of Still Light Grape Wine: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Viña Concha y Toro SA	1.1	1.1	1.2	1.2	1.2
Pernod Ricard Groupe	0.5	0.9	0.8	0.8	0.9
Treasury Wine Estates Ltd	0.5	0.5	0.6	0.6	0.6
Castel Groupe	-	-	-	0.3	0.5
Sogrape Group	0.3	0.3	0.4	0.4	0.4
Viña Santa Rita SA	0.4	0.4	0.4	0.4	0.4
Accolade Wines Ltd	0.4	0.4	0.4	0.4	0.3
KWV Group	0.3	0.3	0.3	0.3	0.3
Grands Chais de France SA, Les	0.3	0.3	0.2	0.2	0.3
Carlyle Group, The	-	-	-	-	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	0.2
Baron Philippe de Rothschild SA	0.2	0.2	0.1	0.1	0.1
Codorníu SA	0.2	0.2	0.2	0.2	-
Listel SAS	0.3	0.3	0.3	-	-
Foster's Group Ltd	-	-	-	-	-
Constellation Brands Inc	-	-	-	-	-
Vranken-Pommery Monopole SA	-	-	-	-	-
Private Label	49.9	50.3	51.4	51.4	51.4
Others	45.3	44.5	43.4	43.3	43.0
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 98 NBO Company Shares of Still Light Grape Wine: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Etn Franz Colruyt NV	10.1	10.4	10.6	10.6	10.5
Delhaize 'Le Lion' SA	10.3	10.3	10.2	10.1	10.2
Carrefour Belgium SA/NV	9.2	9.3	9.7	9.7	9.7
Lidl België GmbH & Co KG	7.1	7.1	7.5	7.6	7.6
Aldi NV/SA	6.6	6.7	6.8	6.8	6.9
Viña Concha y Toro SA	1.1	1.1	1.2	1.2	1.2
Pernod Ricard Belgium	0.8	1.1	1.1	1.1	1.2
Southcorp Holdings Ltd	0.5	0.5	0.6	0.6	0.6
Listel SAS	0.3	0.3	0.3	0.3	0.5
Bacardi Martini Belgium SA	0.3	0.3	0.4	0.4	0.4
Santa Rita	0.4	0.4	0.4	0.4	0.4
Constellation Europe Ltd	0.4	0.4	0.4	0.4	0.3
Grands Chais de France SA, Les	0.3	0.3	0.2	0.2	0.3
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	0.2
Baron Philippe de Rothschild SA	0.2	0.2	0.1	0.1	0.1
Domaines Listel SA	-	-	-	-	-
Other Private Label	6.5	6.5	6.5	6.5	6.5
Others	45.3	44.5	43.4	43.3	43.0
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 99 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2015-2018**

% total volume Brand (Global Brand Owner)	Company	2015	2016	2017	2018
Colruyt (Private Label)	Etn Franz Colruyt NV	10.4	10.6	10.6	10.5
Delhaize (Private Label)	Delhaize 'Le Lion' SA	10.3	10.2	10.1	10.2
Carrefour (Private Label)	Carrefour Belgium SA/NV	9.3	9.7	9.7	9.7
Lidl (Private Label)	Lidl België GmbH & Co KG	7.1	7.5	7.6	7.6
Aldi (Private Label)	Aldi NV/SA	6.7	6.8	6.8	6.9
Jacob's Creek (Pernod Ricard Groupe)	Pernod Ricard Belgium	0.9	0.8	0.8	0.9
Listel (Castel Groupe)	Listel SAS	-	-	0.3	0.5
Lindeman's (Treasury Wine)	Southcorp Holdings Ltd	0.4	0.4	0.4	0.4

Estates Ltd)					
Mateus (Sogrape Group)	Bacardi Martini Belgium SA	0.3	0.4	0.4	0.4
Santa Rita (Viña Santa Rita SA)	Santa Rita	0.4	0.4	0.4	0.4
Other Private Label (Private Label)	Other Private Label	6.5	6.5	6.5	6.5
Others	Others	47.7	46.6	46.2	45.9
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 100 GBO Company Shares of Champagne: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Vranken-Pommery Monopole SA	13.5	15.7	16.7	16.4	16.5
Européenne de Participations Industrielles (EPI) SAS	10.2	10.3	10.8	11.9	11.9
LVMH Moët Hennessy Louis Vuitton SA	10.7	10.8	11.4	11.4	11.6
Groupe Laurent-Perrier	9.1	9.2	9.8	9.9	9.9
Pernod Ricard Groupe	3.1	3.7	4.6	4.8	5.0
Champagne Taittinger	4.1	4.3	4.6	4.5	4.6
GH Martel & Co, Le Groupe	2.5	2.4	2.7	2.7	2.6
Champagne Duval Leroy SA	2.5	2.5	2.6	2.5	2.5
Nicolas Feuillatte	1.4	1.4	1.4	1.4	1.3
Champagne Alain Thienot SAS	1.2	1.1	1.1	1.1	1.0
Champagne Louis Roederer (CLR) SA	1.1	1.1	1.1	1.1	1.0
Champagne Henri Mandois SA	0.9	0.9	0.9	0.9	0.9
Champagne Cattier	0.6	0.6	0.6	0.6	0.5
Rémy Cointreau Group	-	-	-	-	-
Private Label	13.7	13.7	17.2	17.3	17.2
Others	25.4	22.1	14.5	13.5	13.7
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 101 NBO Company Shares of Champagne: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Vranken-Pommery Monopole SA	13.5	15.7	16.7	16.4	16.5
Bacardi Martini Belgium SA	-	-	10.8	11.9	11.9
LVMH Moët Hennessy Louis Vuitton SA	10.0	10.2	10.8	10.9	11.2
Groupe Laurent-Perrier	9.1	9.2	9.8	9.9	9.9
MCS NV SA	3.1	3.7	4.6	4.8	5.0

Champagne Taittinger	4.1	4.3	4.6	4.5	4.6
Etn Franz Colruyt NV	3.6	3.5	3.9	4.0	4.0
Delhaize 'Le Lion' SA	1.2	1.2	3.5	3.4	3.3
Carrefour Belgium SA/NV	2.9	2.9	3.1	3.1	3.1
GH Martel & Co, Le Groupe	2.5	2.4	2.7	2.7	2.6
Champagne Duval Leroy SA	2.5	2.5	2.6	2.5	2.5
Nicolas Feuillatte	1.4	1.4	1.4	1.4	1.3
Champagne Alain Thienot SAS	1.2	1.1	1.1	1.1	1.0
Champagne Louis Roederer (CLR) SA	1.1	1.1	1.1	1.1	1.0
Champagne Henri Mandois SA	0.9	0.9	0.9	0.9	0.9
Champagne Cattier	0.6	0.6	0.6	0.6	0.5
Ruinart Belux SA	0.6	0.6	0.6	0.5	0.5
Maxxium Belgium NV SA	10.2	10.3	-	-	-
Other Private Label	6.0	6.1	6.7	6.7	6.8
Others	25.4	22.1	14.5	13.5	13.7
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 102 LBN Brand Shares of Champagne: % Total Volume 2015-2018

% total volume Brand (Global Brand Owner)	Company	2015	2016	2017	2018
Vranken	Vranken-Pommery Monopole SA	12.1	12.9	12.7	12.8
Piper Heidsieck (Européenne de Participations Industrielles (EPI) SAS)	Bacardi Martini Belgium SA	-	10.8	11.9	11.9
Laurent-Perrier Moët & Chandon	Groupe Laurent-Perrier LVMH Moët Hennessy Louis Vuitton SA	9.2	9.8	9.9	9.9
Taittinger Colruyt (Private Label)	Champagne Taittinger Etn Franz Colruyt NV	4.3	4.6	4.5	4.6
Pommery	Vranken-Pommery Monopole SA	3.6	3.7	3.7	3.7
Mumm (Pernod Ricard Groupe)	MCS NV SA	2.8	3.4	3.5	3.6
Delhaize (Private Label)	Delhaize 'Le Lion' SA	1.2	3.5	3.4	3.3
Carrefour (Private Label)	Carrefour Belgium SA/NV	2.9	3.1	3.1	3.1
Piper Heidsieck (Européenne de Participations Industrielles (EPI) SAS)	Maxxium Belgium NV SA	10.3	-	-	-
Other Private Label (Private Label)	Other Private Label	6.1	6.7	6.7	6.8
Others	Others	35.5	28.5	27.4	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 103 GBO Company Shares of Other Sparkling Wine: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Bacardi & Co Ltd	13.3	13.0	13.3	13.5	13.5
Carlyle Group, The	-	-	-	-	13.1
Oetker-Gruppe	-	-	-	-	12.2
Campari Milano SpA, Davide	4.3	4.5	4.8	5.0	5.0
Pernod Ricard Groupe	3.1	3.0	3.2	3.1	2.9
Ackerman Rémy Pannier	1.7	1.6	1.6	1.6	1.6
Sektellerei Schloss Wachenheim AG	1.5	1.4	1.6	1.6	1.5
Caves Bernard Massard SA	1.7	1.6	1.6	1.5	1.5
Etablissements Fourcroy SA	1.7	1.6	1.6	1.5	1.3
Aimery Sieur d'Arques SA	1.5	1.4	1.5	1.4	1.3
Jaillance SA	1.6	1.5	1.4	1.2	1.1
Codorníu SA	10.2	12.3	13.0	13.0	-
Freixenet SA	8.1	10.5	12.0	12.1	-
Private Label	26.4	26.9	27.9	27.7	27.9
Others	25.0	20.6	16.8	16.7	17.0
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 104 NBO Company Shares of Other Sparkling Wine: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Bacardi Martini Belgium SA	14.8	14.4	14.8	15.1	15.1
Codorníu SA	10.2	12.3	13.0	13.0	13.1
Freixenet SA	8.1	10.5	12.0	12.1	12.2
Etn Franz Colruyt NV	4.7	4.9	5.2	5.2	5.1
MCS NV SA	4.3	4.5	4.8	5.0	5.0
Delhaize 'Le Lion' SA	4.0	4.2	4.4	4.3	4.3
Carrefour Belgium SA/NV	3.4	3.5	3.6	3.5	3.5
Pernod Ricard Belgium	3.1	3.0	3.2	3.1	2.9
Ackerman Rémy Pannier	1.7	1.6	1.6	1.6	1.6
Fourcroy Renglet SA	1.7	1.6	1.6	1.5	1.5
Etablissements Fourcroy SA	1.7	1.6	1.6	1.5	1.3
Aimery Sieur d'Arques SA	1.5	1.4	1.5	1.4	1.3
Jaillance SA	1.6	1.5	1.4	1.2	1.1
Other Private Label	14.3	14.3	14.7	14.6	15.0
Others	25.0	20.6	16.8	16.7	17.0
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 105 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2015-2018

% total volume Brand (Global Brand Owner)	Company	2015	2016	2017	2018
Freixenet (Oetker- Gruppe)	Freixenet SA	-	-	-	8.8
Codorníu (Carlyle Group, The)	Codorníu SA	-	-	-	7.3
Martini Brut (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	5.6	5.4	5.5	5.4
Colruyt (Private Label)	Etn Franz Colruyt NV	4.9	5.2	5.2	5.1
Riccadonna Prosecco (Campari Milano SpA, Davide)	MCS NV SA	4.5	4.8	5.0	5.0
Delhaize (Private Label)	Delhaize 'Le Lion' SA	4.2	4.4	4.3	4.3
Carrefour (Private Label)	Carrefour Belgium SA/NV	3.5	3.6	3.5	3.5
Mia Moscato (Oetker- Gruppe)	Freixenet SA	-	-	-	3.3
Jacob's Creek (Pernod Ricard Groupe)	Pernod Ricard Belgium	1.5	1.8	1.8	1.8
Ackerman	Ackerman Rémy Pannier	1.6	1.6	1.6	1.6
Freixenet	Freixenet SA	8.0	8.7	8.7	-
Codorníu	Codorníu SA	7.0	7.3	7.3	-
Mia Moscato	Freixenet SA	2.5	3.3	3.5	-
Other Private Label (Private Label)	Other Private Label	14.3	14.7	14.6	15.0
Others	Others	42.4	39.3	39.1	38.7
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 106 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2014-2018

% total volume Company	2014	2015	2016	2017	2018
Bacardi & Co Ltd	29.1	29.3	29.3	29.4	29.9
Sogrape Group	10.3	11.2	11.2	10.8	10.8
Symington Family Estates	7.6	9.6	10.5	10.6	10.8
La Martiniquaise SVS	8.1	6.4	6.0	6.0	6.1
Grupo Osborne SA	4.5	4.3	4.5	4.4	4.4
Pernod Ricard Groupe	1.7	2.5	3.0	3.2	3.4
Familli Gancia & CSPA	1.6	2.7	2.8	2.5	2.4
Fladgate Partnership, The	1.0	1.5	2.1	2.1	2.1
González Byass SA	0.5	0.5	0.5	0.5	0.6
Bella Vista ES	0.6	0.5	0.5	0.5	0.5
Campari Milano SpA, Davide	0.2	0.3	0.3	0.4	0.4
Bodegas Baron SA	0.2	0.3	0.3	0.3	0.3
Garvey Grupo	0.7	0.3	0.4	0.1	0.1
Quinta Do Noval Vinhos SA	3.3	2.0	1.9	1.0	-
Fortune Brands Inc	-	-	-	-	-

Private Label	22.9	22.2	22.6	22.5	22.4
Others	7.8	6.4	4.1	5.6	6.0
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 107 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Bacardi Martini Belgium SA	33.6	35.9	36.1	35.8	36.3
Symington Family Estates	7.6	9.6	10.5	10.6	10.8
Pernod Ricard Belgium	5.8	5.7	5.8	6.0	6.4
Diageo Belgium NV SA	6.9	5.4	5.0	4.9	5.0
Grupo Osborne SA	4.5	4.3	4.5	4.4	4.4
Etn Franz Colruyt NV	4.2	4.1	4.2	4.2	4.2
Delhaize 'Le Lion' SA	3.6	3.4	3.4	3.4	3.3
Carrefour Belgium SA/NV	3.2	3.1	3.1	3.0	3.0
Cinoco SA	1.4	2.0	2.6	2.7	2.6
Familli Gancia & CSPA	1.6	2.7	2.8	2.5	2.4
MCS NV SA	2.0	1.7	1.9	1.9	1.8
Bruggeman NV	1.2	1.0	1.1	1.1	1.1
Bella Vista ES	0.6	0.5	0.5	0.5	0.5
Bodegas y Bebidas SA (Grupo)	0.2	0.3	0.3	0.3	0.3
Garvey Grupo	0.7	0.3	0.4	0.1	0.1
Quinta Do Noval Vinhos SA	3.3	2.0	1.9	1.0	-
Other Private Label	12.0	11.6	11.8	11.9	11.9
Others	7.8	6.4	4.1	5.6	6.0
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 108 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2015-2018**

% total volume Brand (Global Brand Owner)	Company	2015	2016	2017	2018
Martini (Bacardi & Co Ltd)	Bacardi Martini Belgium SA	24.8	25.1	25.7	26.2
Offley (Sogrape Group)	Bacardi Martini Belgium SA	6.6	6.8	6.4	6.4
Cruz (La Martiniquaise SVS)	Diageo Belgium NV SA	5.4	5.0	4.9	5.0
Sandeman (Sogrape Group)	Pernod Ricard Belgium	4.6	4.4	4.4	4.5
Osborne	Grupo Osborne SA	4.3	4.5	4.4	4.4
Colruyt (Private Label)	Etn Franz Colruyt NV	4.1	4.2	4.2	4.2
Porto Amuro	Symington Family Estates	3.4	3.5	3.4	3.7
Delhaize (Private Label)	Delhaize 'Le Lion' SA	3.4	3.4	3.4	3.3
Cockburn's	Symington Family Estates	3.1	3.4	3.4	3.3

Carrefour (Private Label)	Carrefour Belgium SA/NV	3.1	3.1	3.0	3.0
Other Private Label (Private Label)	Other Private Label	11.6	11.8	11.9	11.9
Others	Others	25.6	24.8	24.9	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 109 GBO Company Shares of Non-grape Wine: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Tatsuuma-Honke Brewing Co Ltd	62.0	61.2	59.6	58.1	55.0
Takara Holdings Inc	7.7	9.1	11.6	13.2	15.4
Néobulles SA	0.2	0.2	0.1	0.0	-
Siebrand Groep BV	0.3	0.1	0.1	0.0	-
Heineken NV	-	-	-	-	-
Others	29.8	29.5	28.6	28.6	29.6
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 110 NBO Company Shares of Non-grape Wine: % Total Volume 2014-2018**

% total volume Company	2014	2015	2016	2017	2018
Foodex Belgium Sprl	69.7	70.2	71.2	71.3	70.4
Néobulles SA	0.2	0.2	0.1	0.0	-
Siebrand Groep BV	0.3	0.1	0.1	0.0	-
Stassen NV SA	-	-	-	-	-
Others	29.8	29.5	28.6	28.6	29.6
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 111 LBN Brand Shares of Non-grape Wine: % Total Volume 2015-2018**

% total volume Brand (Global Brand Owner)	Company	2015	2016	2017	2018
Hakushika (Tatsuuma-Honke Brewing Co Ltd)	Foodex Belgium Sprl	61.2	59.6	58.1	55.0
Shochikubai Shirakabegura (Takara Holdings Inc)	Foodex Belgium Sprl	9.1	11.6	13.2	15.4
Vivaro	Néobulles SA	0.2	0.1	0.0	-
Pikeurtje	Siebrand Groep BV	0.1	0.1	0.0	-
Vivaro (Heineken NV)	Stassen NV SA	-	-	-	-
Others	Others	29.5	28.6	28.6	29.6
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 112 Forecast Sales of Wine by Category: Total Volume 2018-2023**

million litres	2018	2019	2020	2021	2022	2023
Fortified Wine and Vermouth	17.1	16.9	16.8	16.7	16.7	16.7
- Port	8.1	7.9	7.8	7.7	7.6	7.5
- Sherry	0.9	0.9	0.8	0.8	0.8	0.7
- Vermouth	8.1	8.2	8.2	8.3	8.3	8.4
- Other Fortified Wine	-	-	-	-	-	-
Non-Grape Wine	24.9	23.9	22.9	21.9	20.9	19.8
- Fruit Wine	-	-	-	-	-	-
- Sake	24.9	23.9	22.9	21.9	20.9	19.8
Sparkling Wine	32.2	32.3	32.3	32.3	32.3	32.3
- Champagne	5.9	6.0	6.1	6.1	6.2	6.3
- Other Sparkling Wine	26.2	26.3	26.3	26.2	26.1	26.0
Still Light Grape Wine	223.2	218.9	216.1	214.6	214.0	213.8
- Still Red Wine	106.5	103.3	100.7	98.9	97.6	96.6
- Still Rosé Wine	40.8	41.6	42.4	43.2	44.0	44.8
- Still White Wine	75.8	74.0	73.0	72.5	72.4	72.4
Wine	297.3	292.0	288.1	285.6	283.9	282.6

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

**Table 113 Forecast Sales of Wine by Category: Total Value 2018-2023**

EUR million	2018	2019	2020	2021	2022	2023
Fortified Wine and Vermouth	196.8	195.1	193.9	193.7	194.4	195.4
- Port	98.2	95.8	93.9	92.7	92.0	91.3
- Sherry	10.4	9.8	9.4	9.0	8.6	8.2
- Vermouth	88.2	89.4	90.6	92.1	93.9	95.8
- Other Fortified Wine	-	-	-	-	-	-
Non-Grape Wine	455.1	430.5	410.9	387.1	366.4	343.6
- Fruit Wine	-	-	-	-	-	-
- Sake	455.1	430.5	410.9	387.1	366.4	343.6
Sparkling Wine	671.1	675.2	678.1	681.4	686.3	690.6
- Champagne	326.0	330.2	334.7	340.0	346.3	352.3
- Other Sparkling Wine	345.2	345.0	343.4	341.5	339.9	338.3
Still Light Grape Wine	2,024.3	1,980.8	1,945.7	1,924.8	1,910.7	1,904.7
- Still Red Wine	1,100.3	1,068.2	1,041.2	1,022.5	1,007.7	999.2
- Still Rosé Wine	272.8	275.3	277.9	281.3	284.9	289.0
- Still White Wine	651.3	637.3	626.6	621.0	618.1	616.5
Wine	3,347.4	3,281.6	3,228.6	3,186.9	3,157.8	3,134.3

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

**Table 114 Forecast Sales of Wine by Category: % Total Volume Growth 2018-2023**

% total volume growth



	2018/19	2018-23 CAGR	2018/23 Total
Fortified Wine and Vermouth	-1.1	-0.5	-2.3
- Port	-2.2	-1.4	-6.6
- Sherry	-5.7	-4.4	-20.0
- Vermouth	0.5	0.8	3.9
- Other Fortified Wine	-	-	-
Non-Grape Wine	-4.0	-4.4	-20.3
- Fruit Wine	-	-	-
- Sake	-4.0	-4.4	-20.3
Sparkling Wine	0.2	0.1	0.3
- Champagne	0.9	1.1	5.8
- Other Sparkling Wine	0.1	-0.2	-0.9
Still Light Grape Wine	-1.9	-0.9	-4.2
- Still Red Wine	-3.0	-1.9	-9.3
- Still Rosé Wine	2.0	1.9	9.8
- Still White Wine	-2.4	-0.9	-4.6
Wine	-1.8	-1.0	-5.0

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

**Table 115 Forecast Sales of Wine by Category: % Total Value Growth 2018-2023**

% local currency, constant value growth

	2018/2019	2018-23 CAGR	2018/23 Total
Fortified Wine and Vermouth	-0.9	-0.1	-0.7
- Port	-2.3	-1.4	-7.0
- Sherry	-5.8	-4.6	-21.0
- Vermouth	1.3	1.7	8.6
- Other Fortified Wine	-	-	-
Non-Grape Wine	-5.4	-5.5	-24.5
- Fruit Wine	-	-	-
- Sake	-5.4	-5.5	-24.5
Sparkling Wine	0.6	0.6	2.9
- Champagne	1.3	1.6	8.1
- Other Sparkling Wine	-0.1	-0.4	-2.0
Still Light Grape Wine	-2.2	-1.2	-5.9
- Still Red Wine	-2.9	-1.9	-9.2
- Still Rosé Wine	0.9	1.2	6.0
- Still White Wine	-2.2	-1.1	-5.3
Wine	-2.0	-1.3	-6.4

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