

# WHO'S WHO IN THE NETHERLANDS

At the annual food & drinks shows Horecava and Wine Professional, Cees van Casteren MW asked a representation of the trade and press about who they thought mattered the most in the Dutch market. These are his findings.

**W**ine consumption in Holland was very small at the beginning of the 1960s, but now most Dutch consume as much or more wine per capita as the UK.

## *What the Dutch drink*

Historical links from the Old World to the New World have favoured the acceptance of South African wines in the Netherlands. The similarity of Afrikaans and Dutch also aid pronunciation of names and identification with areas. South Africa has gone from nothing to 24.2% of market share, taking white wine market share from Germany and France, and red wine market share from Italy and France. Spain and the Netherlands have also always been historical allies and strong trading partners for centuries, and that shows. The importance of Spanish wines in the Netherlands as the third-largest market share (9.7%) after France and South Africa is much greater than elsewhere in Europe.

It is interesting to note that Chile has grown spectacularly to fourth place (8.8%) in volume and third place (10.1%) in value, while Australia is seventh place (7.0%) in volume and fifth place (8.5%) in value. Conversely, Germany is in fifth place in volume but in only sixth place in value, while California has just 2% of the market, rather than the double-digit market share it enjoys in Britain. Having noted this, all the growth in the Netherlands comes from the New World, particularly Chile, South Africa and Australia.

In the Netherlands, 50% of the wines are red, 40% white and 10% rosé. The largest decline in the Netherlands over the past 20 years has been in the fortified wine market – sherry, port and vermouth – and this is still continuing.

As to where people buy wine, the Netherlands is a classic off-trade market. The vast majority – some 85% of the wines sold – are sold in the off-trade, with 15% through the on-trade. Yes, Holland is a typical



**Most significant independent**  
**Xavier Kat, Okhuysen**

‘take home market’. Almost 90% of wines in the off-trade are sold through the multiple grocers, and less than 5% through multiple specialists. The average price paid for wine in the supermarket has stabilised over the last three years, at just under €3.00 (\$3.35) in 2015; however, import duty is only €0.72 and the VAT is 21%.

## *Most significant multiple grocer*

As in other European countries, consolidation of the market has meant that multiple grocers have grown and increased their market share, leaving fewer players with large market shares. In the Netherlands, Albert Heijn (850 stores) is the biggest, with an estimated market share in wine of 35%. Superunie, a buying group for 13 retailers, is second with 30% market share (1,800 stores), followed by Jumbo (now 580 stores) – who recently acquired C1000 and Super de Boer – followed by the first discounter, Aldi. So, Albert Heijn dominates the wine market. They also own the largest multiple specialist, Gall & Gall (550 stores), to boot. As was expected, Albert Heijn was voted ‘best supermarket’ for wine in Holland by an overwhelming

98% of interviewees. Interviewees not only praised the sheer range but also the fact that Albert Heijn has almost all leading brands on their shelves. The fact that Jumbo was not mentioned even once must be a sign that the buying team in Veghel has some work to do.

Albert Heijn was also most mentioned as the main importer, although Delta Wines, Groupe LFE and Baarsma also got votes.

## *Most significant independent*

Until the emergence of supermarkets as sellers of wine in the 1980s, the Dutch market used to be dominated by so-called slijters. These are multiple specialists who have a liquor licence and can thus sell beer, wine, fortifieds and spirits, while the supermarkets are only allowed to sell low/moderate alcoholic beverages, but no hard liquor. Holland used to have more than 4,000 independent slijters, but the competition with the supermarkets in wine, beer and fortifieds forced many out of business. For many others it meant giving up independence to join buying groups or franchises. Although there was a big spread of votes among the trade representatives canvassed, and many independents named – including Residence, Ad Bibendum, and Grapedistrict, among others – Xavier Kat of Okhuysen in Haarlem got the most votes, closely followed by Ton Overmars in Amsterdam, Bloem’s Vinotheek and Les Généreux, which are franchises of specialty wine stores.

## *Online retailer*

Online wine sales have experienced a spectacular growth in the Netherlands. The most spectacular online business of last year has been Wijnvoordeel.nl, a wine concept by the Baarsma group. Wijnvoordeel.nl especially got into the spot light when they used new media in ‘creative ways’ to acquire email addresses. In short: they faked a



**Most significant buyer**  
**Frank Donker, Groupe LFE**

mistake in their system and spread a rumour via Facebook and Twitter that if customers applied a certain discount code (ALLSAFE) this would give them an additional €20.00 off the bill for a six pack of wine that was already discounted by 50% (from €48.00 to €24.00). Applying the discount would mean that customers paid just €4.00 for the six pack, plus €6.00 in delivery costs. Readers on social media assumed this was a mistake by Wijnvoordeel.nl and they shared the news, resulting in massive ordering (12,000 orders in first week) - allowing thousands of new email addresses to be collected. Afterwards Wijnvoordeel.nl admitted that it had been a deliberate - and very successful - promotional effort to acquire email addresses. The 'new media' campaign was followed by aggressive promotional campaigns on television and within a week Wijnvoordeel.nl had acquired up to 80,000 new email addresses. No wonder that Wijnvoordeel.nl was top-of-mind for most interviewees. Interestingly, a German online concept, Wine in Black, followed in second position. Many Dutch customers appreciate the premium offer, the competitive pricing and focused offers of Wine in Black.

### *Communications*

When asking about who the most influential wine communicator in Holland is, I expected the name of Harold Hamersma, the editor of Holland's main wine guide, to come up frequently. The reason? When representatives of Albert Heijn were asked recently why they didn't organise an annual trade tasting for their wines, they replied, "Why would we? There is only one journalist [and that is Harold Hamersma]." Surprisingly, very few of those surveyed mentioned Hamersma, and none of his colleagues in the

press named him either. Instead, Perswijn Magazine was voted by most as the most important communicator, followed by Jan van Lissum, who organises the Wine Professional on-trade wine show in Amsterdam, along with several other wine and food events, and who is the GaultMillau editor and publisher of the magazine Proefschrift. Also mentioned was respected journalist and educator Lars Daniëls, followed by Harold Hamersma in fourth position. Interestingly Vivino was mentioned several times as well as leading in wine communication.

### *Most significant sommelier*

There were few mentions of any of the up-and-coming sommeliers, which was surprising, as Holland is currently one of Europe's hottest culinary destinations, with more one-, two- and three-Michelin star restaurants than ever before. Ruben Kwakman (le VIN'x, Den Bosch) received one mention, as did Alessandro Matrone, (Waldorf Astoria, Amsterdam) and Jasper van den Hoogen (Bord'Eau, Amsterdam). But most feedback o mentioned the established names. Petro Kools (Da Vinci, Maasbracht) was mentioned, as was Noël Vanwittenbergh (Ciel Bleu, Amsterdam), Ronald Opten (La Rive, Amstel Hotel, Amsterdam) and Roy Pelgrim (Cordial, Oss). Edwin Raben also got many votes although many acknowledged that he rather is a trainer and communicator about wine and food than an active sommelier. But by far most votes were given to Peter Bruins, the sympathetic head sommelier of Restaurant De Bokkedoorns (Overveen). According to respondents he "combined knowledge with charm" like no one else.

### *Most significant buyer*

Many different names surfaced when asked which wine buyer came first to mind. Among them was Birthe van Meegeren (Gall & Gall), Hans Bootsma (Ahold) and Spike Huisman at Ahold, (who transferred last year from Jumbo to Albert Heijn). However, two names were mentioned most frequently:



**Most significant PR agency**  
**Robert Verhoeven and Harriet Boekholt, Pitch PR**

Niels Holm (of Jumbo Supermarkets) and, in clear first position, Frank Donker at Groupe LFE. Donker's dedication and overall knowledge, as well as expertise in the field of bulk wines were mentioned as special strengths.

### *Most significant PR agency*

TOT PR got many votes, suggesting its new team is apparently doing a very good job, while Melman Communications got some mentions, as did Michèle Lainé at Sopexa and Colette Klautz at CK Media. However, most votes went to Pitch PR, a relative newcomer to the wine sector. Interviewees thought that Robert Verhoeven and Harriet Boekholt were maybe less part of the old boys wine network, with plenty of "fresh ideas" that made them more creative than the established agents.

### *Most influential person*

Many had to think deeply about who would be the most influential person in the Dutch wine market. In many cases, respondents said they were more influenced by foreign critics such as Jancis Robinson MW and Tim Atkin MW, for example, or foreign magazines, particularly Decanter and The Wine Advocate, rather than by anybody in the Dutch market itself. The few Dutch wine personalities that were mentioned included Peter van Houtert, chairman of KVNW, along with Harold Hamersma, Hubrecht Duijker, Hans Bootsma, Niels Holm and Jan van Lissum. ■



**Most significant sommelier**  
**Peter Bruins, head sommelier,**  
**Restaurant De Bokkedoorns**  
**(Overveen)**