A division of the IWSR Group

Belgium

Wine Landscapes 2022

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Wine Intelligence Viewpoint

A mature market, Belgium has seen a small drop in the number of wine drinkers in the market, along with a fall in category knowledge. However, there is evidence of premiumisation, with spend increasing.

The proportion of Belgian adults who are regular wine drinkers has fallen by 2% from 2017, despite the overall adult population growing by 2.5% over the same period.

Wine volumes have also declined, while other categories like spirits and RTDs have recorded growth, suggesting consumers are moving to other beverage alcohol.

There is also evidence of moderation, with health-conscious Belgians reducing alcohol consumption.

Domestic wine is the only country of origin with recorded and forecast growth in volumes, with wine from other regions declining.

Drinking in the on-trade seems to have recovered post-pandemic, with wine consumption in bars bouncing back.

The market has been undergoing premiumisation, with average spend increasing across a range of occasions. More premium price bands are also forecast to grow in volume to 2026.

However, inflationary pressures and a potential economic downturn could impact spend. There is evidence Belgian consumers are pessimistic about the future and could adjust consumption accordingly.

Opportunities

Premiumisation
On-trade bounce back
Domestic wine

Threats

Moderation
Competition from other drinks
Inflation & loss of disposable income

Management Summary

Belgium Wine Landscapes

2022

Management Summary

Key takeaways

1. Wine drinking population falls slightly

Between 2017 and 2022 the number of adults drinking wine at least once a month shrunk a small amount. There is evidence that moderation is driving this, with health-conscious Belgians cutting consumption. The competition from other alcoholic beverages also plays a part in this trend; the proportion of regular wine drinkers who drink wine at least weekly rose slightly in the same period

2. Volumes of wine sold in Belgium are decreasing

Although the wine category makes up around a quarter of the total volume of alcohol sold in Belgium, wine consumption has declined at a sharp rate (-3.1% a year in volume). The category is also forecast to shrink by a further 0.9% per year over the next five years.

3. Belgium's regular wine drinkers have evolving repertoires

The wine repertoire of regular wine drinkers is changing with less of them saying they consume red or white wine compared to 2018. At the same time, the penetration rate of rosé was on the up. Champagne and Prosecco achieved higher consumption incidences compared with 2020, with Prosecco almost matching pre-pandemic levels.

4. Lower knowledge among Belgium regular wine drinkers

When compared to both 2018 and 2020, consumers know fewer source countries or regions of origin. Consumers are paying attention to a smaller set of origins and their level of knowledge has decreased in recent years.

Management Summary

Key takeaways

5. Fall in awareness of all main wine origins

All major countries and regions of origin have experienced declines in awareness levels, which suggests that consumers have steadily narrowing wine repertoires.

6. Clear signs of market premiumisation

Although the volumes of wine being sold in Belgium are in decline, regular wine drinkers report increasing typical spend across most occasions in the off-trade and on-trade. Entry level wines are forecast to continue declining and growth driven by mid and higher price points

7. Changing types of involvement with wine

Although involvement with wine is stable, a smaller proportion of regular wine drinkers say that drinking wine gives them pleasure. A greater proportion consider wine an expensive drink. Taken together, these trends suggest that the perception of value for money in the category has decreased.

8. Belgian bars are enjoying a post-pandemic boost

The penetration of wine drinking in bars is higher than rates recorded in both 2018 and 2020. Younger generations groups are driving the demand for wine in these settings

Management Summary

Key takeaways

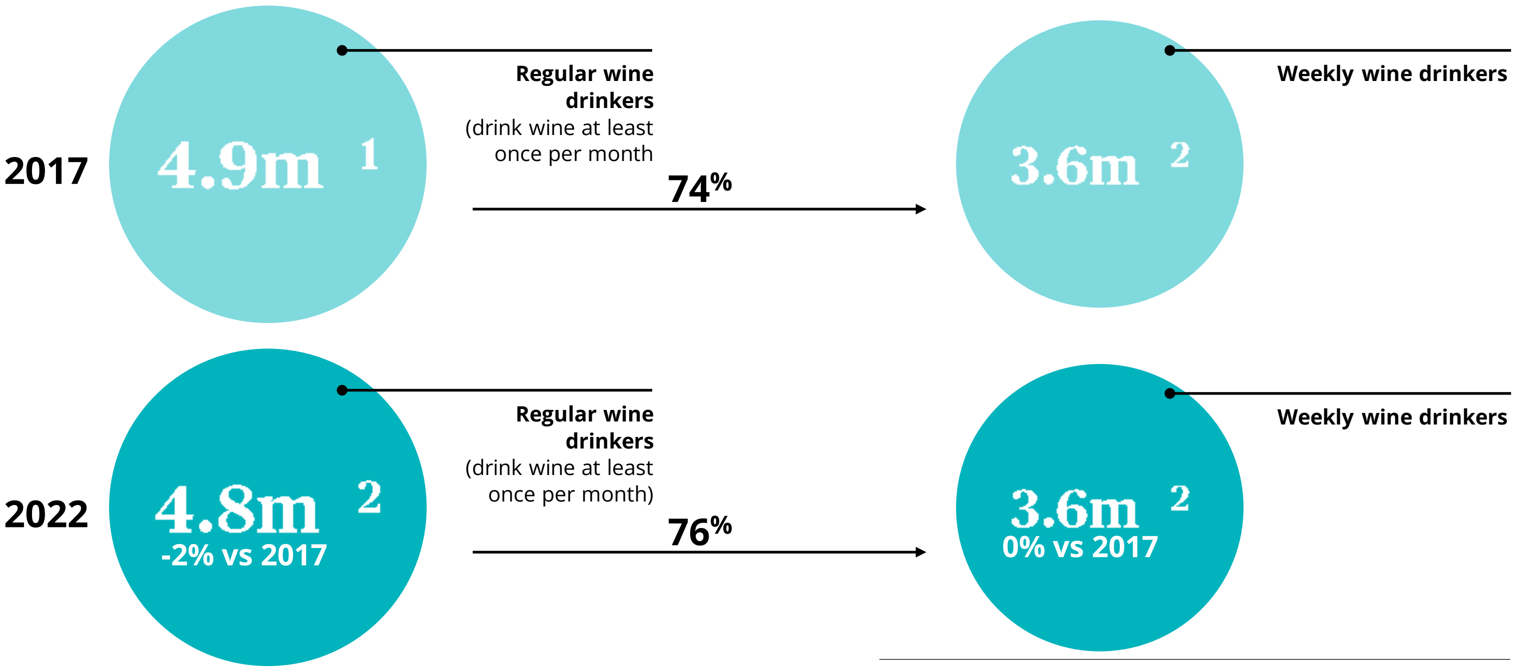
9. Belgian regular wine drinkers are pessimistic about the future

Although consumers are confident about managing their finances, they are anxious about the upcoming year and they believe their household will be worse off in a year. This mood is reflected in their wine purchasing behaviours: more regular wine drinkers say that they are buying less and cheaper wine.

1. Wine drinking population falls slightly

Between 2017 and 2022 the number of adults drinking wine at least once a month, despite an overall growing adult population. There is evidence that moderation is driving this, with health-conscious Belgians cutting consumption. The competition from other alcoholic beverages also plays a part in this trend; the proportion of regular wine drinkers who drink wine at least weekly rose slightly in the same period

Decline in regular and weekly wine drinkers



Q: What do market experts say?

"People are drinking less regularly, and the number of heavy drinkers is declining, They'll probably drink in the weekend or they drink for occasions and then they spend a bit more. But the consumers that used to drink wine at every meal … that number is decreasing. I think people are also taking care a little bit of their health and so try to limit their alcohol consumption."

Importer, Belgium

1 Wine Intelligence online calibration study with TNS, Feb '17 (n≥819) Belgian adults. Wine=still light wine (red, white, rosé)

2 Wine Intelligence telephone calibration study with TNS, rolling average of Feb '19 and Feb '21 (n≥1,034) Belgian adults. Wine=still light wine (red, white, rosé)

3 Wine Intelligence, Vinitrac® Belgium Mar '17, Apr '22 (n≥1,004) Belgian regular wine drinkers

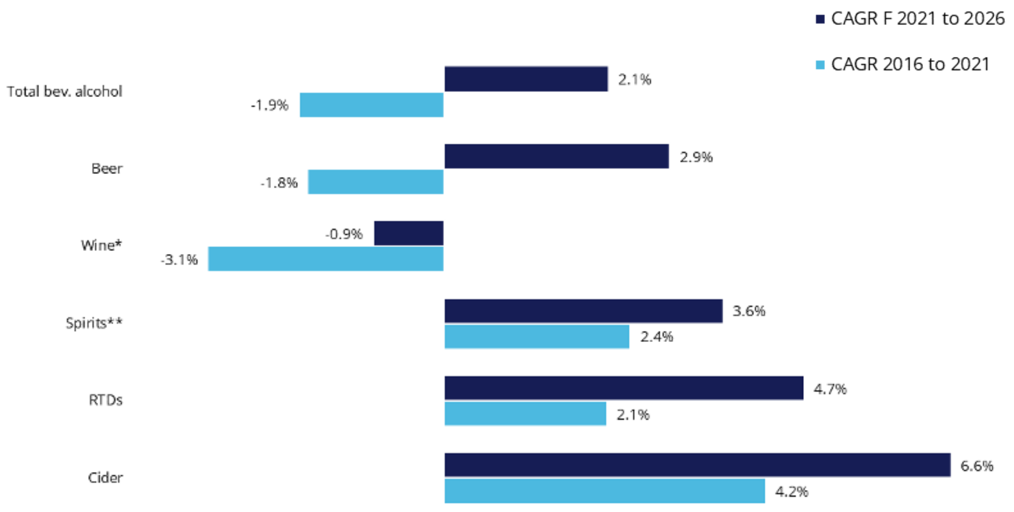
2. Volumes of wine sold in Belgium decreasing

The wine category in Belgium experienced a sharp decline between 2016 and 2021 (-3.1% CAGR). It's also the only category to see a decline in volumes in 2021, shrinking by 0.9%

Wine consumption is forecast to shrink further between 2021 and 2026.

Historic and forecast volume growth

Five-year CAGR %



Total wine volumes by category

'000s 9-litre cases

	2020	2021
Total beverage alcohol	109,741.56	114,114.75
Beer	77,400.00	81,361.11
Wine*	26,990.75	26,737.55
Spirits**	4,131.37	4,621.20
RTDs	825.00	931.00
Cider	394.44	463.89

Source: IWSR

3. The evolving repertoires of Belgium's regular wine drinkers

Consumption incidences for both red and white wine have significantly declined since 2018, while rosé wine has increased

Champagne and Prosecco penetration rates dropped between 2018 and 2020, but both experienced a healthy recovery between 2020 and 2022

Alcoholic beverage repertoire: Top 15 tracking

% who have drunk the following beverages in the past 12 months
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	White wine	85%	80%	81%	↓	→
2	Red wine	85%	77%	75%	↓	→
3	Beer	67%	71%	67%	→	→
4	Rosé wine	55%	63%	60%	↑	→
5	Cava	65%	53%	54%	↓	→
6	Champagne (French Champagne)	58%	47%	52%	↓	↑
7	Craft beer	40%	42%	40%	→	→
8	Prosecco	40%	31%	39%	→	↑
9	Cocktails	28%	28%	30%	→	→
10	Gin	27%	34%	29%	→	↓
11=	Rum	21%	26%	26%	↑	→
11=	Whisky / Whiskey	27%	28%	26%	→	→
13	Port	27%	27%	22%	↓	↓
14	Liqueurs	21%	22%	21%	→	→
15	Vodka	20%	22%	20%	→	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

4. Lower knowledge among Belgium's regular wine drinkers

Although the level of involvement has remained unchanged, knowledge has significantly decreased between 2020 and 2022

Compared with 2020, Belgian regular wine drinkers have heard of fewer source countries, regions of origin and brands

Wine knowledge index: Tracking

Base = All Belgian regular wine drinkers (n≥819)

	2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	vs. '20
Knowledge Index	**37.2**	**37.2**	**33.3**	↓	↓

-3.9 Index change vs 2018

Wine confidence index: Tracking

Base = All Belgian regular wine drinkers (n≥819)

	2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	vs. '20
Confidence Index	**46.5**	**45.3**	**45.8**	→	→

-0.7 Index change vs 2018

Q: What do market experts say?

"The older generation, who would've known quite a lot about wine and would've spent a lifetime drinking, are drinking less overall or are no longer involved in the category, and the younger generation are drinking across a wider range of categories."

Researcher, Belgium

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.
Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

5. Fall in awareness of wine origins

All major source countries and regions of origin have experienced a decline in awareness levels, which clearly suggests that consumers increasingly dedicate their attention to narrowing wine repertoires

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	France	94%	92%	84%	↓	↓
2	Italy	82%	82%	74%	↓	↓
3	Spain	80%	77%	72%	↓	↓
4	South Africa	73%	72%	63%	↓	↓
5	Chile	70%	68%	58%	↓	↓

Region of origin awareness: Tracking

% of those who know the following regions produce wine
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Bordeaux	89%	90%	76%	↓	↓
2	Bourgogne	82%	82%	70%	↓	↓
3=	Champagne	82%	83%	68%	↓	↓
3=	Côtes du Rhône	82%	77%	68%	↓	↓
5	Saint-Émilion	77%	72%	63%	↓	↓

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

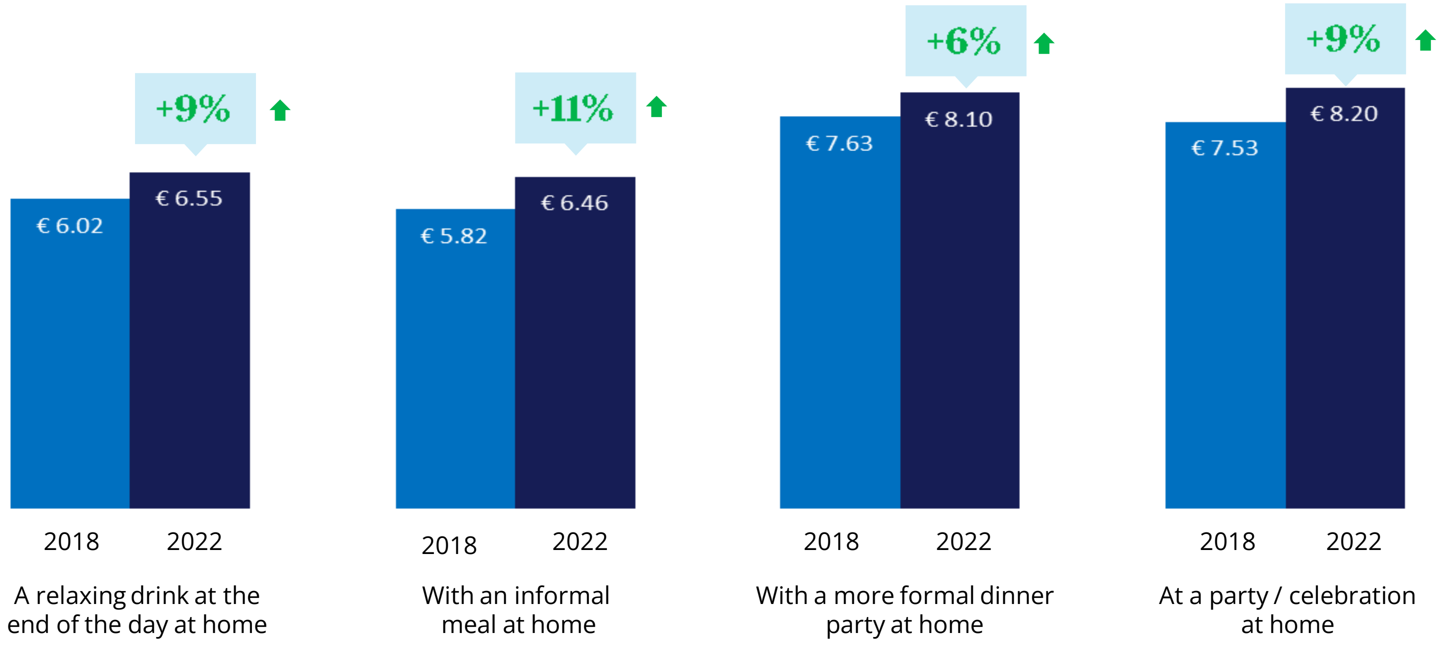
6. Typical spend grows among Belgium regular wine drinkers

In an era of decline in the volume of wine consumed in the Belgian market, it continues to show signs of premiumisation

The stated amount typically spent by regular wine consumers increased between 2018 and 2022, with the quickest increase between 2018 and 2020. It seems to have stabilised in 2021 and 2022.

Off-trade: Typical spend per bottle by occasion

Base = Those who buy wine in the off-trade



Q: What do market experts say?

"Price are rapidly increasing, especially in the premium segment. However, disposable incomes do not follow this trend. The future is uncertain."

Importer, Belgium

Q: What do market experts say?

"The price of wine used to be between between €6.90 and €8.90, and now it's between €9 and €13. And that is true across the whole market. It looks like people were trading up."

Researcher, Belgium

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

7. Changing types of involvement with wine

Although overall involvement levels are stable, more consumers perceive wine as being expensive. Significantly fewer associate drinking wine with pleasure.

This suggests that wine has lost a bit of ground in terms of perceived value for money, providing less pleasure but costing more.

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Drinking wine gives me pleasure	84%	83%	77%	↓	↓
2	I always look for the best quality wines I can get for my budget	75%	78%	73%	→	↓
3	Deciding which wine to buy is an important decision	64%	61%	61%	→	→
4	I like to take my time when I purchase a bottle of wine	60%	60%	59%	→	→
5	I have a strong interest in wine	46%	46%	47%	→	→
6	Wine is important to me in my lifestyle	47%	44%	45%	→	→
7	Compared to others, I know less about the subject of wine	38%	39%	44%	↑	→
8	Generally speaking, wine is reasonably priced	35%	35%	38%	→	→
9	I don't understand much about wine	30%	32%	36%	↑	→
10	Generally speaking, wine is an expensive drink	30%	30%	35%	↑	↑
11	I feel competent about my knowledge of wine	21%	20%	26%	↑	↑

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

8. Belgian bars get a post-pandemic boost

Wine penetration in bars has considerably increased between 2020 and 2022.

Younger consumers drive wine consumption in these types of premises. This is also the case in restaurants but the gap between Gen X and Boomers is much narrower.

Wine purchase in on-trade

% who buy wine in a bar, pub or restaurant
Base = All Belgian regular wine drinkers (n≥819

On-trade location		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
Bar	Yes	32%	30%	38%	↑	↑
	No	68%	70%	62%	↓	↓
Restaurant	Yes	79%	77%	77%	→	→
	No	21%	23%	23%	→	→

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Belgian regular wine drinkers (n=1,004)

On-trade location		Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
Bar	Yes	38%	66%	57%	39%	24%
	No	62%	34%	43%	61%	76%
Restaurant	Yes	77%	85%	88%	81%	67%
	No	23%	15%	12%	19%	33%

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

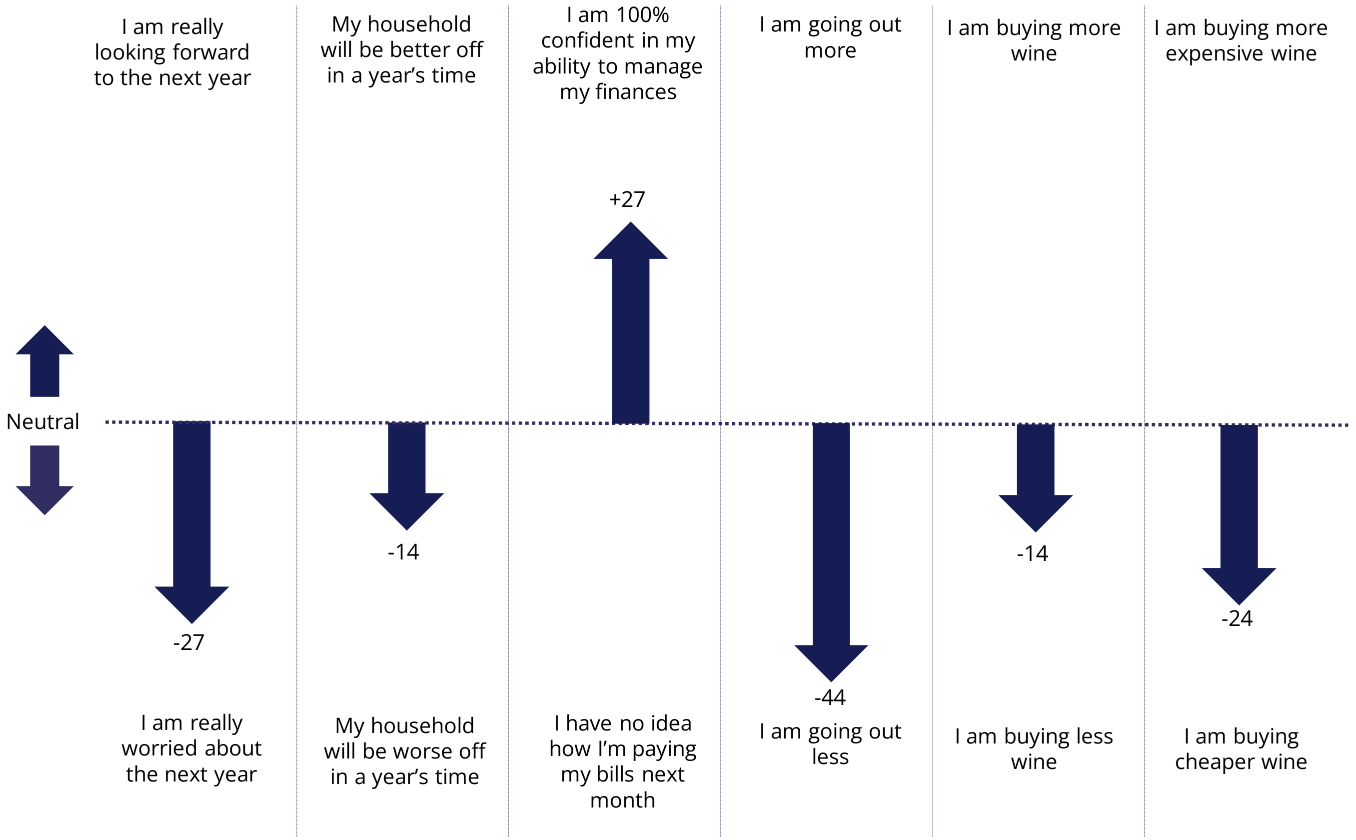
9. Belgian regular wine drinkers are pessimistic about the near future

Although Belgian regular wine drinkers are confident about managing their finances, they are anxious about the upcoming year and they believe their household will be worse off in 12 months' time

Overall, the regular wine drinking population tends towards negative views about wine purchases, both in volume and price points

Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Belgian regular wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, Apr '22, (n=1,004) Belgian regular wine drinkers

Management summary – tracking metrics

Wine repertoire has been narrowing in recent years, specially for source countries and regions of origin. At the same time, rosé wines have recruited new consumers.

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2018	2022	Tracking
White wine	**85%**	**81%**	↓
Red wine	**85%**	**75%**	↓
Beer	**67%**	**67%**	→
Rosé wine	**55%**	**60%**	↑
Cava	**65%**	**54%**	↓

Top country of origin

% who have drunk wine from the following places in the past six months

	2018	2022	Tracking
France	**84%**	**73%**	↓
Italy	**43%**	**38%**	↓
Spain	**36%**	**29%**	↓
South Africa	**27%**	**21%**	↓
Chile	**25%**	**17%**	↓

Top region of origin

% who have bought wine from the following regions in the past six months

	2018	2022	Tracking
Bordeaux	**42%**	**32%**	↓
Côtes du Rhône	**28%**	**23%**	↓
Cava	**26%**	**21%**	↓
Champagne	**24%**	**19%**	↓
Bourgogne	**20%**	**17%**	↓

Top wine brands

% who have bought the following brands in the past three months

	2018	2022	Tracking
J.P. Chenet	**15%**	**16%**	→
Gran Barón	**18%**	**16%**	→
Mateus	**9%**	**10%**	→
Casillero Del Diablo	**10%**	**10%**	→
Gato Negro	**6%**	**9%**	↑

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

Management summary – tracking metrics

While supermarket purchases have remained constant since 2018, purchases for wine ay Colruyt and Delhaize has declined

Top red varietals
% who have drunk the following varietals in the past six months

	2018	2022	Tracking
Merlot	**55%**	**47%**	⬇
Cabernet Sauvignon	**52%**	**43%**	⬇
Pinot Noir	**44%**	**40%**	➡
Shiraz / Syrah	**25%**	**22%**	➡
Malbec	**13%**	**15%**	➡

Top wine-shopping channels
% who have bought wine from the following channels in the past six months

	2018	2022	Tracking
In the supermarket	**61%**	**61%**	➡
In a department store	**39%**	**36%**	➡
In the hyper-market	**33%**	**35%**	➡
From a specialist wine shop	**26%**	**21%**	⬇
On shopping trips in France	**18%**	**16%**	➡

Top white varietals
% who have drunk the following varietals in the past six months

	2018	2022	Tracking
Chardonnay	**63%**	**60%**	➡
Sauvignon Blanc	**45%**	**42%**	➡
Pinot Grigio / Pinot Gris	**46%**	**42%**	➡
Riesling	**29%**	**26%**	➡
Gewürztraminer	**20%**	**17%**	➡

Top wine-shopping retailers
% who mainly use the following retailers to buy wine

	2018	2022	Tracking
Colruyt	**45%**	**38%**	⬇
Delhaize	**42%**	**37%**	⬇
Carrefour	**31%**	**30%**	➡
Aldi	**17%**	**19%**	➡
Lidl	**15%**	**16%**	➡

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

Market Data

Belgium Wine Landscapes

2022

Market data

Key takeaways

1. Still wine makes up a quarter of the total alcohol market in Belgium

Beer is the largest category in the market, making up 71% of total volume sold, while still wine is at 23%

2. Declining wine volumes

Between 2016 and 2021 the volume of wine sold declined by 3.1% a year, with the category forecast to shrink by a further 0.9% CAGR between 2021 and 2026

3. Sparkling wines driving the market

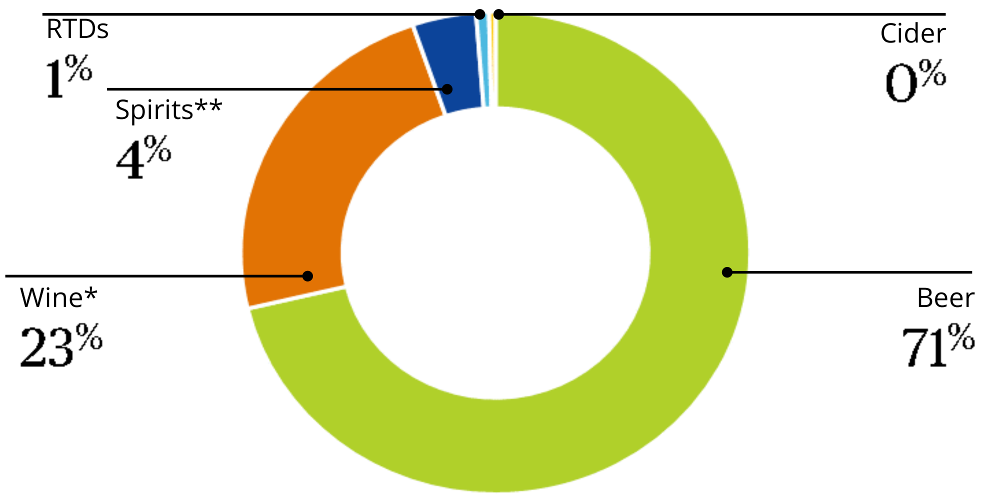
Sparkling wine volume are down in recent years but decline has been slower than still wine. Sparkling wines is the only wine category forecast to grow in the next five years.

Total beverage alcohol market share by category

Wine is second to beer and makes up just under a quarter of total volume

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

'000s 9-litre cases

	2020	2021
Total beverage alcohol	109,741.56	114,114.75
Beer	77,400.00	81,361.11
Wine*	26,990.75	26,737.55
Spirits**	4,131.37	4,621.20
RTDs	825.00	931.00
Cider	394.44	463.89

Market data is from Belgium and Luxembourg

Source: IWSR

* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

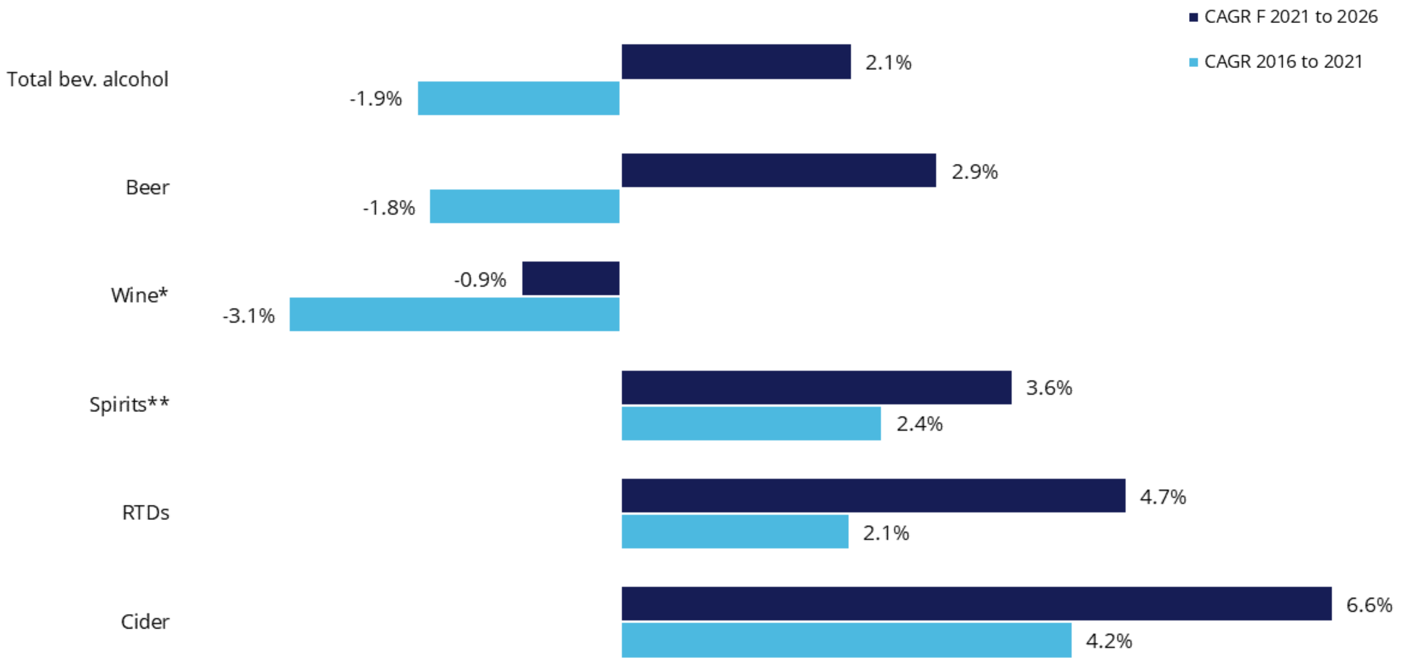
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Alcohol market change 2016-2026

The volume of wine consumed declined at a fast pace between 2016 and 2021 (-3.1% per year) and is forecast to contract further between 2021 and 2026

Historic and forecast volume growth by category

Five-year CAGR %



Market data is from Belgium and Luxembourg

Source: IWSR

* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

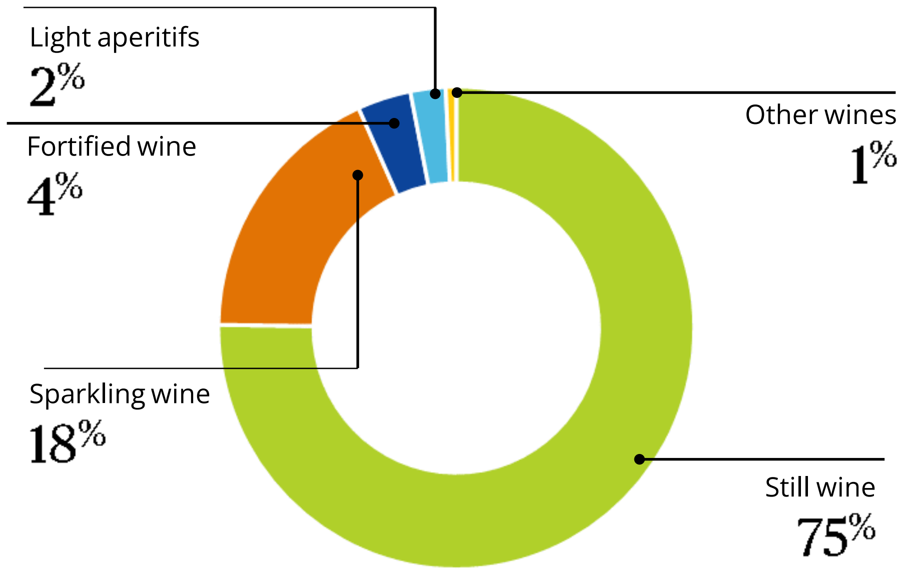
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Total wine market volumes

Still wine makes up three quarters of the total volume sold within the Belgium market

Total wine share by category

% of purchases that fall within the categories below



Total wine volumes by category

'000s 9-litre cases

	2020	2021
Total Wine	**26,990.75**	**26,737.55**
Still Wine	**20,602.00**	**20,108.00**
Sparkling Wine	**4,491.50**	**4,828.00**
Fortified Wine	**1,004.75**	**971.80**
Light Aperitifs	**699.00**	**640.25**
Other Wines	**193.50**	**189.50**

Market data is from Belgium and Luxembourg

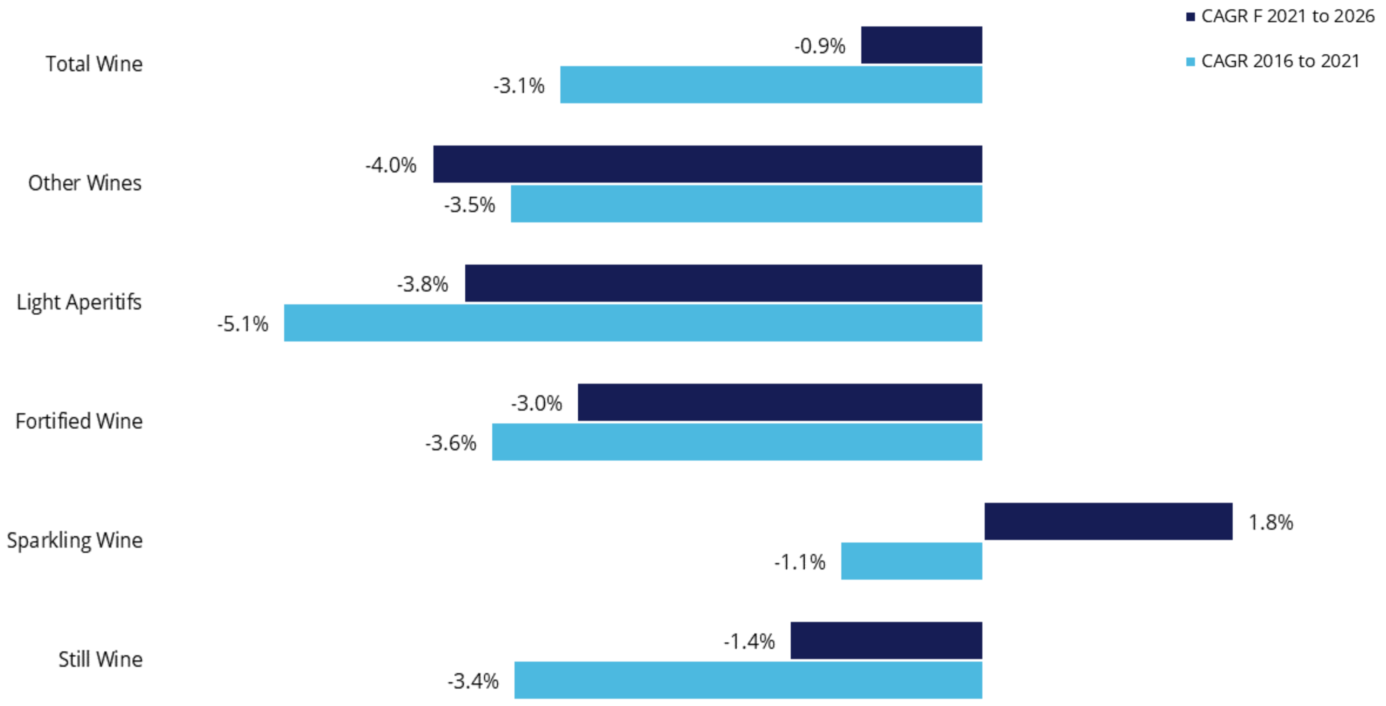
Other Wines includes non-grape based wines
Source: IWSR

Wine market change 2016-2026

Between 2016 and 2021, all wine categories were down. Sparkling wine decline was slower and it is forecast to increase between 2021 and 2026

Historic and forecast volume growth by wine type

Five-year CAGR %



Market data is from Belgium and Luxembourg

Source: IWSR

Q: What do market experts say?

"Sparkling wine has doubled since 2007. It is consumed across the board, but particularly by younger drinkers, for aperitif occasions and after work drinks. Younger drinkers are probably more likely to have shifted their focus to sparkling wine away from still."

Researcher, Belgium

Still wine volumes by origin

French wine is dominant and makes up the majority of still wine consumed within the Belgium market

Total still wine volumes and market share by origin

'000s 9-litre cases

		2020	2021	Market Share
	Total	**20,602.00**	**20,108.00**	
1	**French**	**11,509.00**	**11,169.00**	**56%**
2	**Italian**	**2,219.00**	**2,163.00**	**11%**
3	**Spanish**	**1,665.55**	**1,559.55**	**8%**
4	**Belg / Lux**	**1,325.45**	**1,366.95**	**7%**
5	**South African**	**913.00**	**904.00**	**4%**
6	**Chilean**	**619.00**	**593.75**	**3%**
7	**Australian**	**546.00**	**569.50**	**3%**
8	**Portuguese**	**476.00**	**450.00**	**2%**
9	**US**	**336.00**	**333.00**	**2%**
10	**German**	**310.00**	**300.00**	**1%**

Market data is from Belgium and Luxembourg

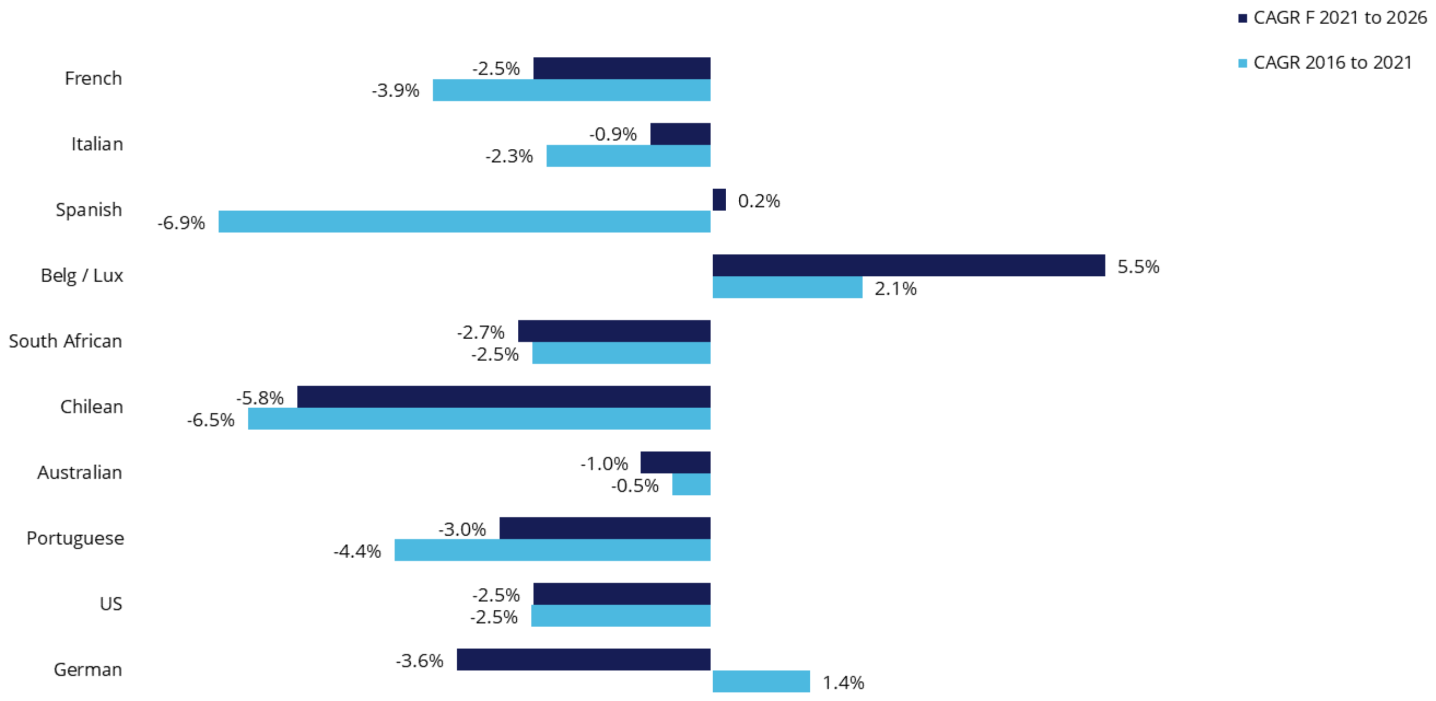
Source: IWSR

Still wine forecasts by origin

Domestic still wines was one of the few source countries to enjoy healthy growth in recent years; it is forecast to continue growing until 2026

Historic and forecast volume growth by country of origin

Five-year CAGR %



Q: What do market experts say?

"There is a real challenge in accessing wines from the New World right now due to supply chain issues."

Importer, Belgium

Market data is from Belgium and Luxembourg

Source: IWSR

Still wine retail price by origin

All countries of origin have seen an increase to their retail price between 2016 and 2021; this growth is expected to continue although at a much slower pace

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2021 (US$)	CAGR 16-21	CAGR F 21-26
	Total	**7.75**	**4.5%**	**1.3%**
1	**French**	**8.20**	**3.9%**	**1.5%**
2	**Italian**	**6.58**	**7.5%**	**3.2%**
3	**Spanish**	**6.88**	**7.0%**	**0.8%**
4	**Belg / Lux**	**7.14**	**4.4%**	**0.1%**
5	**South African**	**7.27**	**3.1%**	**0.7%**
6	**Chilean**	**9.39**	**6.2%**	**0.5%**
7	**Australian**	**7.89**	**4.1%**	**0.8%**
8	**Portuguese**	**6.58**	**4.3%**	**0.0%**
9	**US**	**6.24**	**3.2%**	**0.2%**
10	**German**	**6.49**	**3.3%**	**0.0%**

Market data is from Belgium and Luxembourg

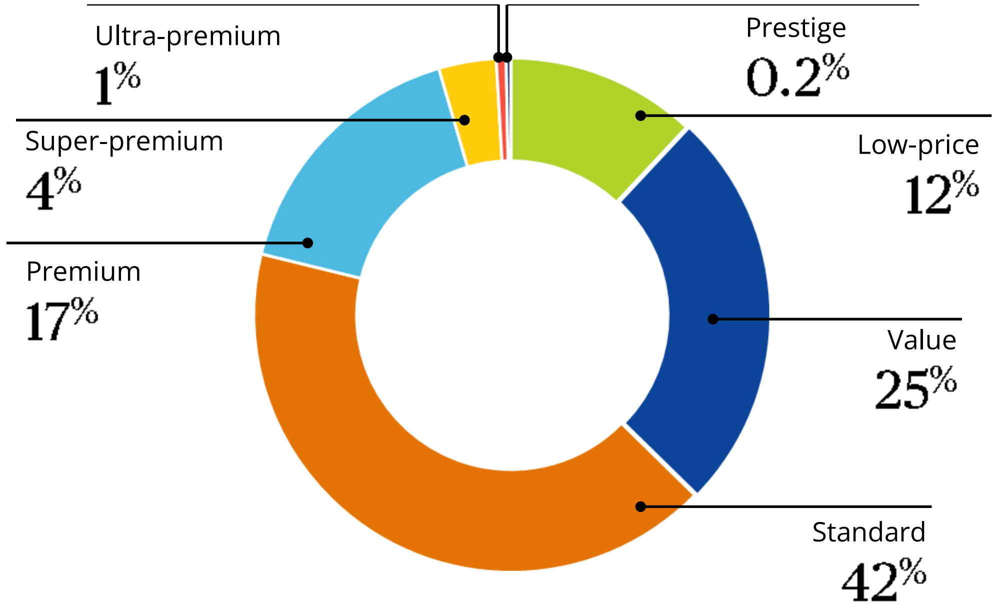
Source: IWSR

Still wine by price band

About two-thirds of wine is sold between €2.50 and €7.49

Still wine by price band

% of purchases that fall within the categories below



Still wine volumes by price band

'000s 9-litre cases

	2020	2021
Low-Price (Under €2.5)	**2,500.00**	**2,407.00**
Value (€2.50 to €4.49)	**5,221.45**	**5,110.50**
Standard (€4.50 to €7.49)	**8,763.20**	**8,357.80**
Premium (€7.50 to €14.99)	**3,251.03**	**3,349.80**
Super Premium (€15.00 to €24.99)	**715.81**	**727.10**
Ultra Premium (€25.00 to €39.99)	**121.05**	**125.33**
Prestige (€40.00 to €79.99)	**29.46**	**30.47**

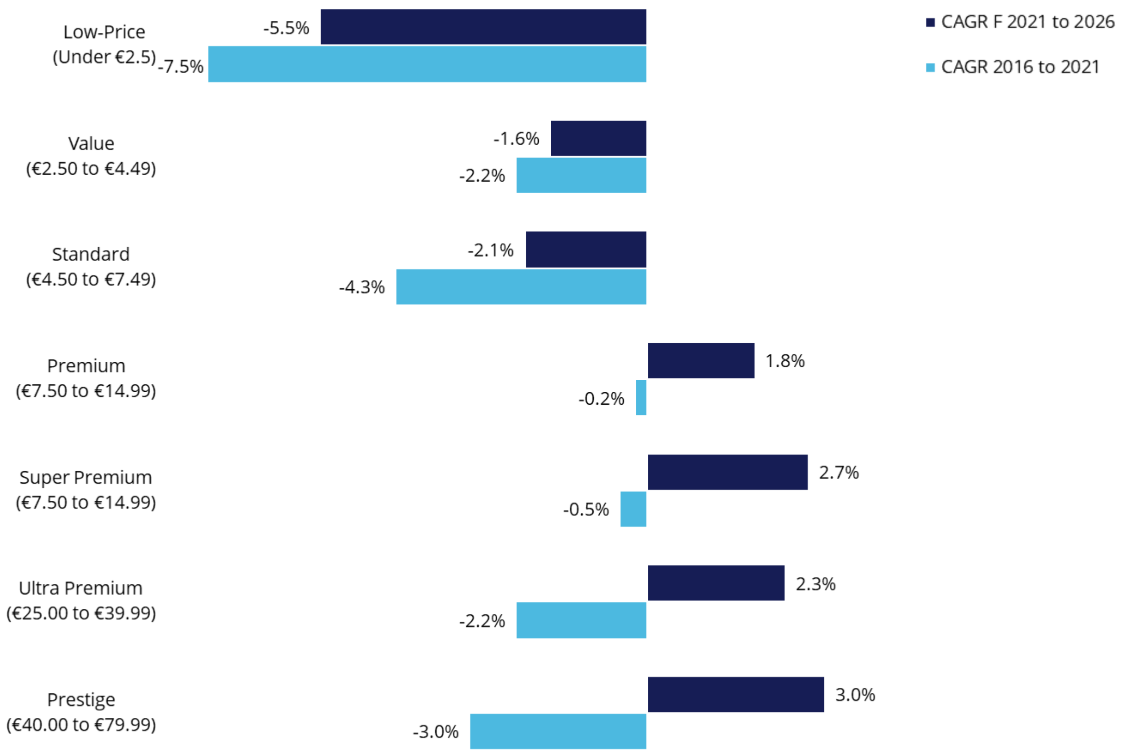
Source: IWSR

Still wine growth by price band

All price points in the Belgian market saw decreases in volumes sold, with low-priced wine the hardest hit. Premium and higher price points are forecast to increase from 2021 to 2026

Historic and forecast volume growth by price band

Five-year CAGR %



Source: IWSR

Still wine consumption per capita

Per capita consumption within the Belgian market has decreased between 2016 and 2021, and is expected to keep declining

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2020	2021	CAGR 16-21	CAGR 20-21
1	**Portugal**	38.85	43.00	-1.4%	10.7%
2	**Italy**	42.75	41.77	-1.5%	-2.3%
3	**Montenegro**	38.63	41.77	-1.5%	8.1%
4	**Slovenia**	37.71	37.63	-2.6%	-0.2%
5	**Switzerland**	36.56	36.14	-1.3%	-1.1%
6	**France**	37.44	35.75	-4.5%	-4.5%
7	**Denmark**	33.08	33.37	-0.2%	0.9%
8	**Hungary**	30.95	31.52	0.0%	1.8%
9	**Austria**	31.02	30.93	-1.0%	-0.3%
10	**US Virgin Islands**	26.36	28.15	-1.7%	6.8%
11	**Greece**	25.46	27.95	-3.0%	9.8%
12	**Germany**	28.57	27.78	-0.6%	-2.8%
13	**Turks and Caicos**	23.14	27.56	-5.1%	19.1%
14	**St. Barths**	21.50	26.57	n/a	23.6%
15	**Uruguay**	26.99	25.62	0.0%	-5.1%
16	**Argentina**	28.71	25.14	-3.2%	-12.4%
17	**Sweden**	24.46	23.83	0.9%	-2.6%
18	**Romania**	24.01	23.73	2.6%	-1.1%
19	**Slovakia**	22.77	22.95	-0.8%	0.8%
20	**Spain**	20.00	22.31	-1.2%	11.5%
34	**Belgium and Luxembourg**	18.40	17.83	-3.4%	-1.4%

Market data is from Belgium and Luxembourg

Source: IWSR

Sparkling wine volumes by origin

Spanish wine is the market leader in the sparkling category, followed closely behind by Italian and French

Total sparkling wine volumes and market share by origin

'000s 9-litre cases

		2020	2021	Market Share
	Total	**4,491.50**	**4,828.00**	
1	**Spanish**	**1,661.35**	**1,719.00**	**36%**
2	**Italian**	**1,240.25**	**1,393.75**	**29%**
3	**French**	**1,157.45**	**1,236.25**	**26%**
4	**Belg / Lux**	**212.15**	**238.75**	**5%**
5	**German**	**172.70**	**188.75**	**4%**
6	**Chilean**	**12.50**	**11.25**	**0%**
7	**South African**	**11.10**	**11.25**	**0%**
8	**Australian**	**7.50**	**10.00**	**0%**
9	**International**	**4.85**	**5.40**	**0%**
10	**Czech Republic**	**4.25**	**4.75**	**0%**

Market data is from Belgium and Luxembourg

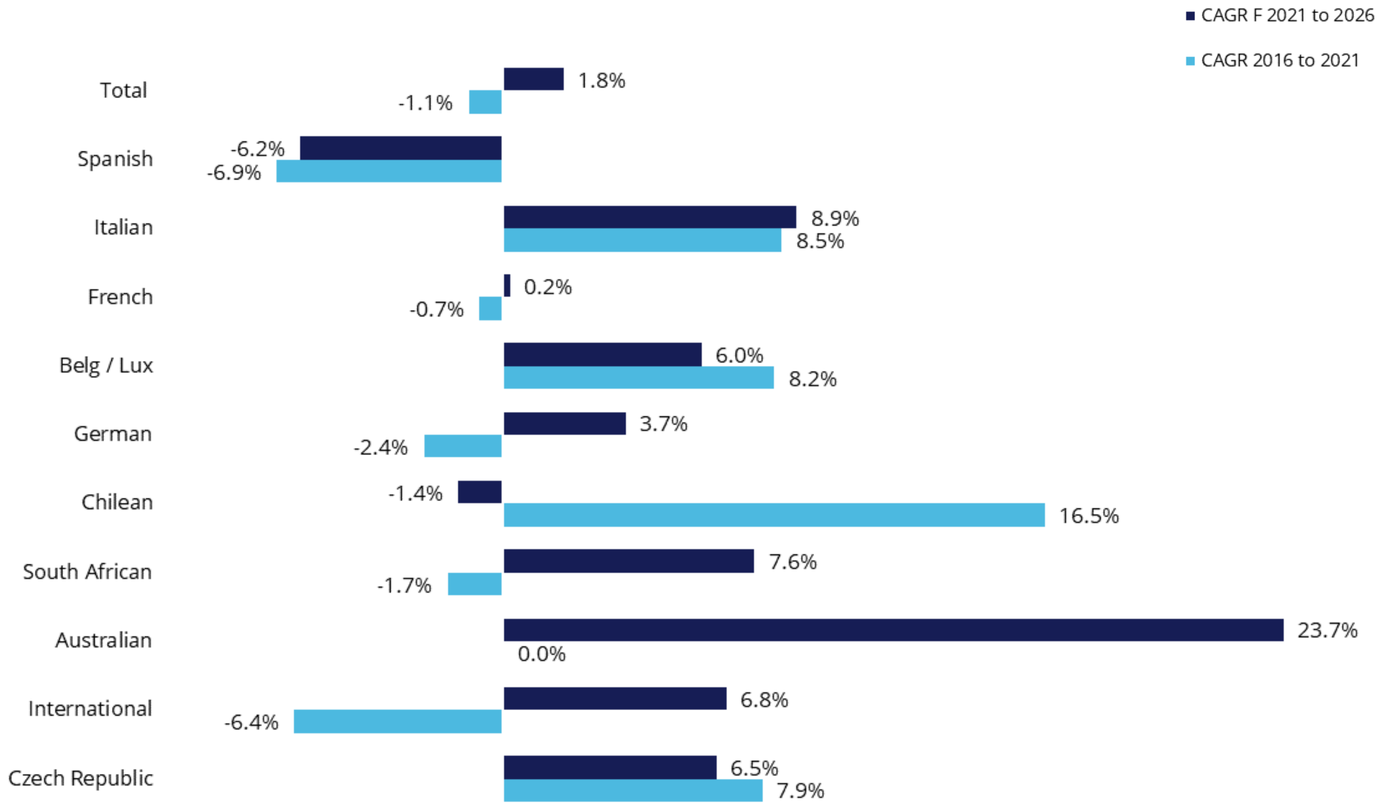
Source: IWSR

Sparkling wine growth by country of origin

Despite being the market leader, Spanish sparkling is declining in volumes. Italian sparkling wines have grown and French is stable. Australian wines are expected to experience strong growth although from a much lower base

Historic and forecast growth by country of origin

Five-year CAGR %



Source: IWSR

Sparkling wine retail price by origin

French sparkling wine, which includes Champagne, has the highest retail price per bottle; the top three countries have experienced strong price growth in recent years though premiumisation is expected to slow

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2021 (US$)	CAGR 16-21	CAGR F 21-26
	Total	12.24	5.8%	0.8%
1	Spanish	8.13	7.4%	1.6%
2	Italian	9.11	3.5%	0.6%
3	French	23.25	5.2%	1.4%
4	Belg / Lux	9.12	0.5%	-0.6%
5	German	5.62	2.7%	0.6%
6	Chilean	6.82	-5.6%	-0.6%
7	South African	9.67	2.9%	-0.3%
8	Australian	8.98	-3.3%	-1.3%
9	International	5.90	2.5%	0.0%
10	Czech Republic	11.41	0.8%	0.0%

Market data is from Belgium and Luxembourg

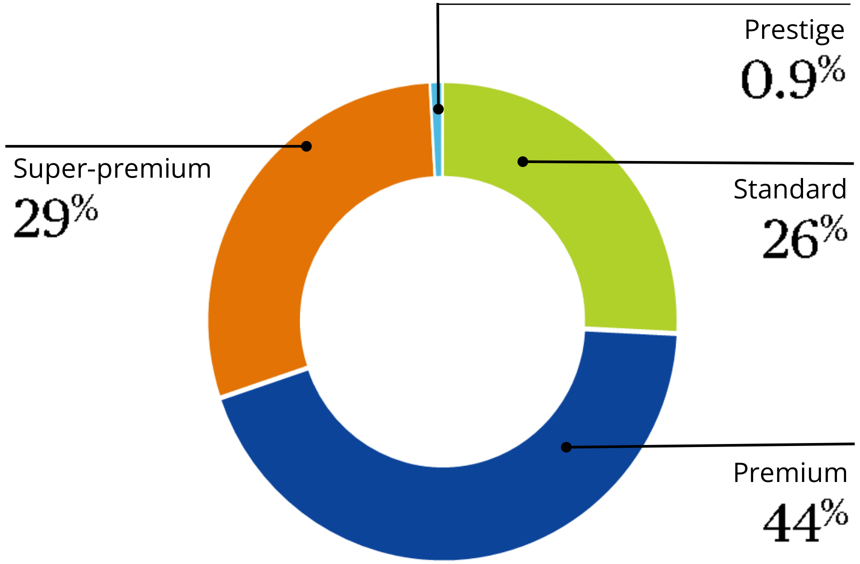
Source: IWSR

Champagne by price band

Premium and above Champagnes account for 74% of sales

Champagne by price brand

% of purchases that fall within the categories below



Champagne volumes by price band

'000s 9-litre cases

	2020	2021
Standard (under €17.50)	189.15	211.00
Premium (€17.50 to €29.99)	300.50	360.00
Super Premium (€30.00 to €99.99)	199.50	240.00
Prestige (€100 and above)	5.85	7.00

Market data is from Belgium and Luxembourg

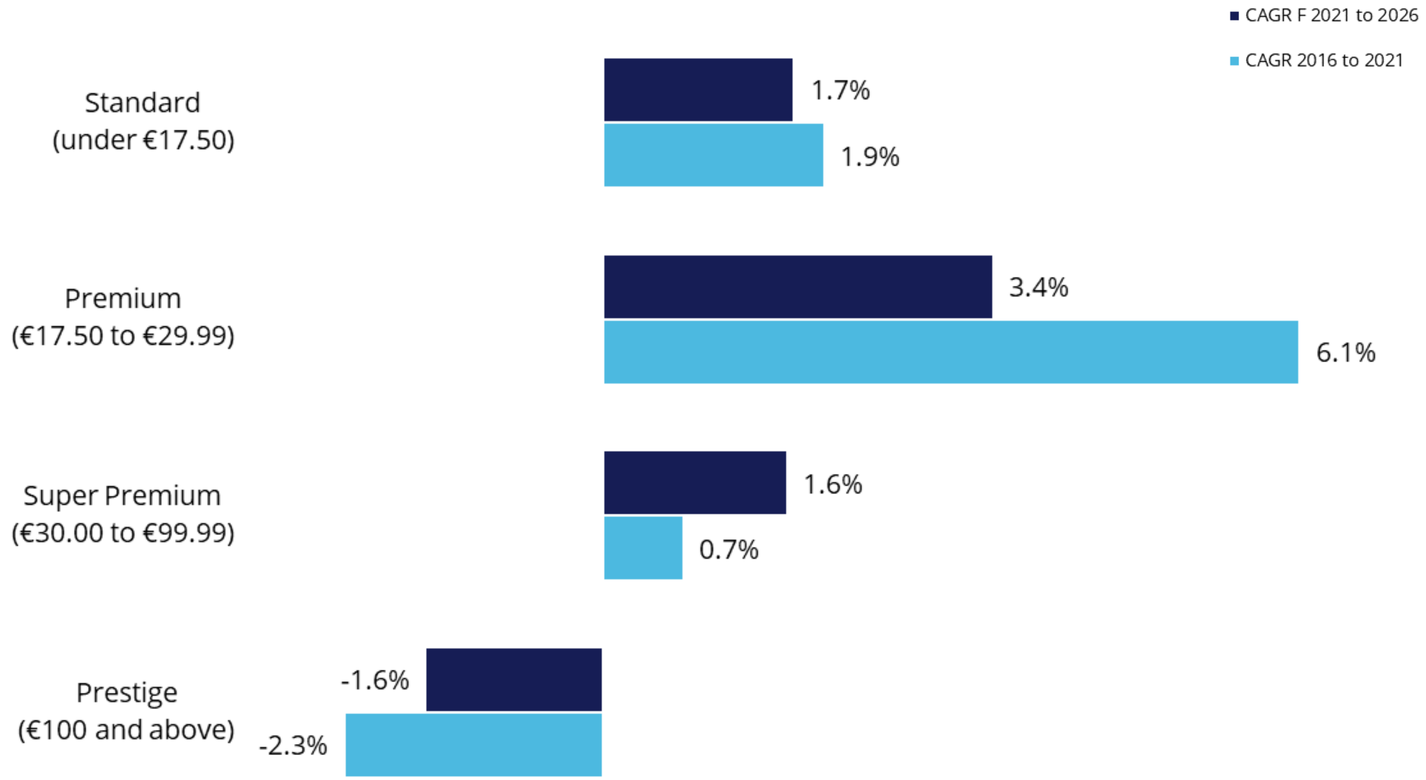
Source: IWSR

Champagne wine growth by price band

Mid-priced Champagne drives the category. However, prestige Champagne is down and this trend is expected to continue

Historic and forecast growth by price band

Five-year CAGR %



Market data is from Belgium and Luxembourg

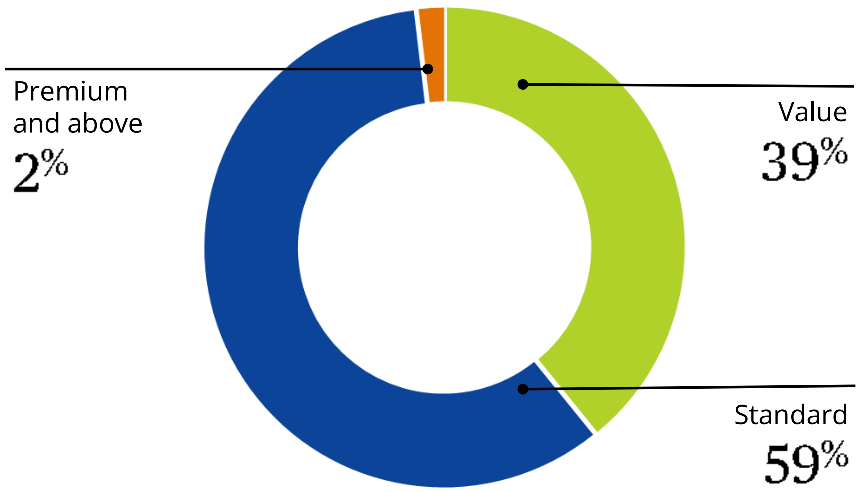
Source: IWSR

Other sparkling wine by price band

Standard-priced sparkling wine makes up half of the sparkling wine sold

Sparkling wine by price brand

% of purchases that fall within the categories below



Sparkling wine volumes by price band

'000s 9-litre cases

	2020	2021
Value (Under €5.00)	**1,557.38**	**1,519.66**
Standard (€5.00 to €9.99)	**2,069.12**	**2,288.59**
Premium (€10.00 and above)	**61.50**	**73.65**

Market data is from Belgium and Luxembourg

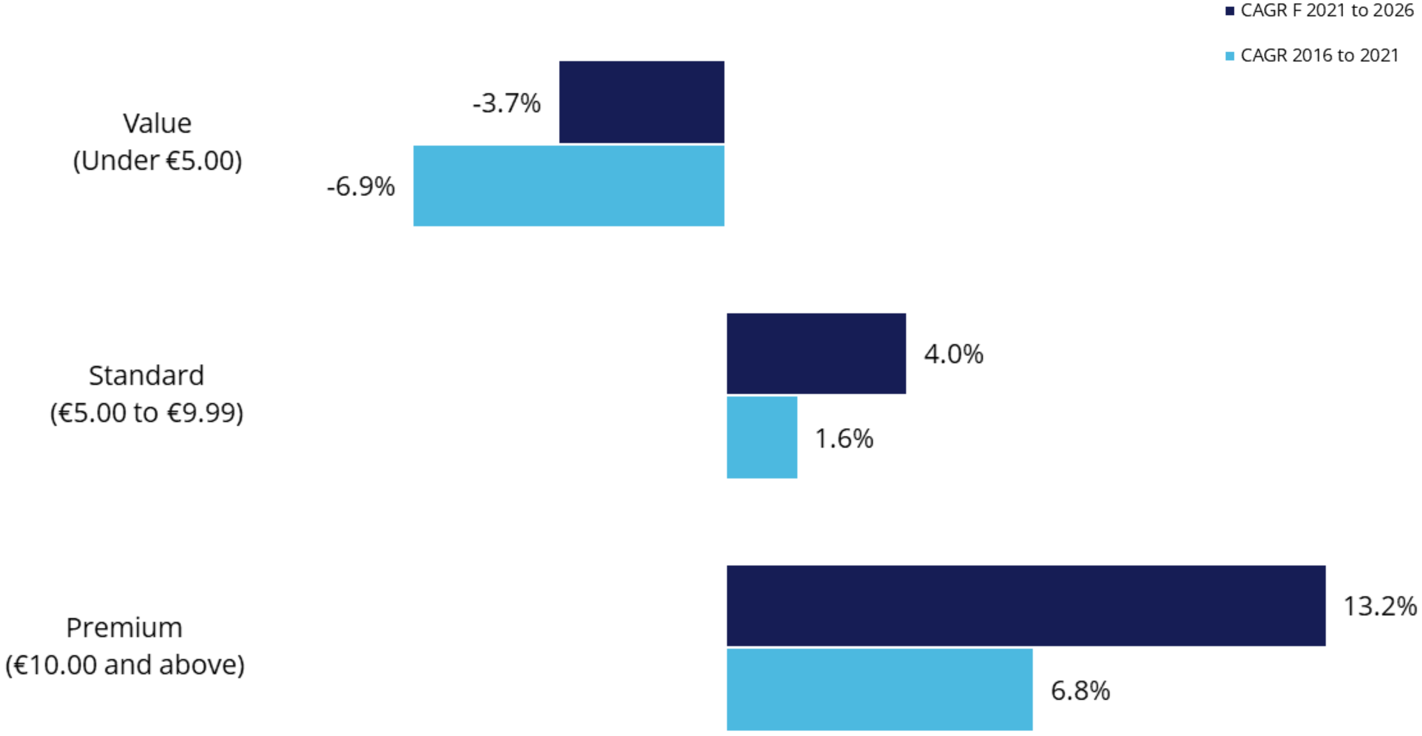
These price bands do not include Champagne
Source: IWSR

Other sparkling wine growth by price band

Entry-level sparkling wine is down. Higher-priced sparkling wine has grown and is forecast to continue growing

Historic and forecast growth by price band

Five-year CAGR %



Market data is from Belgium and Luxembourg

Q: What do market experts say?

"I think there could be some concern for volume producers in the low-end spectrum of the market, where alternatives for other alcoholic beverages may be less impacted by increases in price. Some of those producers have had to increase their prices to levels which are so high that they're less competitive than beer or other types of alcoholic beverages."

Importer, Belgium

These price bands do not include Champagne
Source: IWSR

Sparkling wine consumption per capita

Belgium and Luxembourg is a top 10 market for per capita consumption of sparkling wine. The category recovered in 2021

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2020	2021	CAGR 16-21	CAGR 20-21
1	St. Barths	7.03	9.77	n/a	40.1%
2	Italy	7.51	7.79	2.6%	3.9%
3	Turks and Caicos	5.34	6.64	-3.8%	27.2%
4	Germany	5.53	5.57	-2.3%	0.3%
5	Lithuania	4.40	4.88	1.9%	9.7%
6	France	4.33	4.74	-1.9%	9.8%
7	Latvia	4.61	4.47	1.1%	-4.2%
8	Belgium and Luxembourg	4.01	4.28	-1.1%	7.5%
9	Martinique	3.90	4.19	-5.8%	7.8%
10	Guadeloupe	3.57	4.15	-4.3%	16.9%
11	Estonia	3.60	4.08	1.6%	12.6%
12	Austria	3.17	3.44	0.2%	8.8%
13	Sweden	3.05	3.34	10.8%	10.4%
14	Switzerland	2.93	3.23	1.7%	10.9%
15	United Kingdom	2.87	3.22	2.4%	12.4%
16	Cayman Islands	3.14	3.18	5.4%	3.4%
17	Australia	2.98	3.18	6.4%	8.4%
18	New Zealand	3.06	3.11	1.5%	3.1%
19	Czech Republic	2.56	2.90	10.0%	13.5%
20	Slovenia	2.80	2.89	3.6%	3.2%

Source: IWSR

Fortified wine volumes: Current and historical

The volume of fortified wine sold within Belgium has declined between 2016 and 2021 and is forecast to decline further for all three major source countries

Fortified wine volumes and market share by origin

'000s 9-litre cases

	2020	2021	CAGR 16-21	CAGR 21-26
Total	1,004.75	971.80	-3.6%	-3.0%
Portuguese	783.00	757.00	-3.2%	n/a
French	126.80	120.80	-4.9%	n/a
Spanish	57.8	58.8	-5.39%	n/a

Market data is from Belgium and Luxembourg

Source: IWSR
No data available for forecast

Market Demographics

Belgium Wine Landscapes

2022

Market demographics

Key takeaways

1. Wine drinking population declines

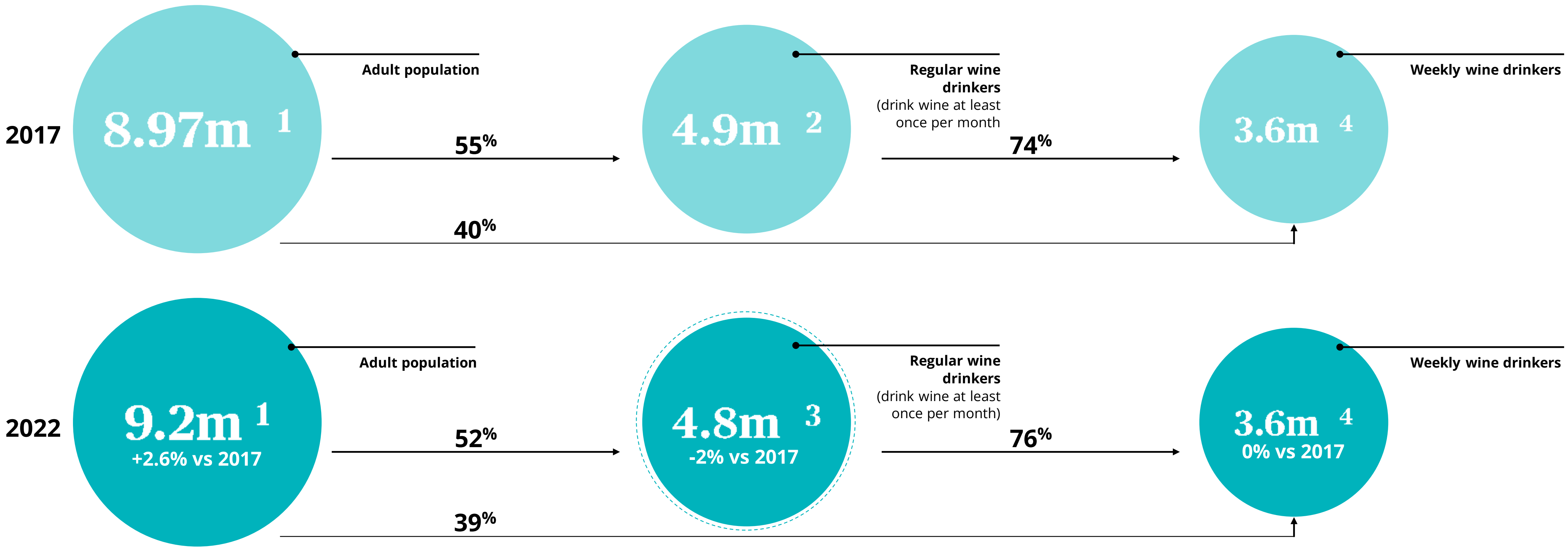
The number of monthly wine drinkers has dropped since 2017 (-4%). Weekly wine drinkers decreased by 2.6%.

2. Greater number of female drinkers

When compared to 2018 there are significantly greater numbers of female regular wine drinkers. The gender ratio of the monthly wine drinking population is now split evenly.

Belgium wine drinkers

Although the adult population of Belgium has increased since 2017, the number of regular wine drinkers has decreased

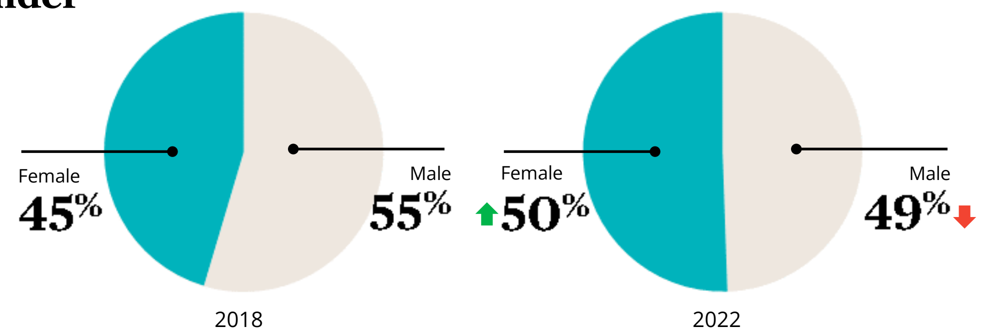


1 be.STAT
2 Wine Intelligence online calibration study with TNS, Feb '17 (n≥992) Belgian adults. Wine=still light wine (red, white, rosé)
3 Wine Intelligence telephone calibration study with TNS, rolling average of Feb '19 and Feb '21 (n≥1,034) Belgian adults. Wine=still light wine (red, white, rosé)
4 Wine Intelligence, Vinitrac® Belgium Mar '17, Apr '22 (n≥1,004) Belgian regular wine drinkers

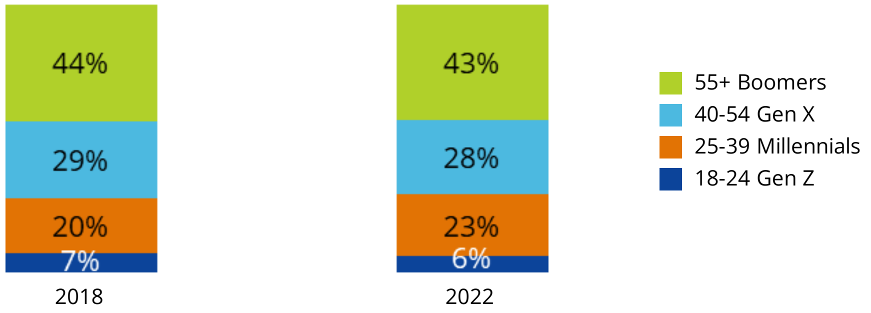
Demographics of regular wine drinkers

More women make up the number of regular wine drinkers than in 2018; the generational make-up remains stable, with nearly three-quarters aged 40 or over

Gender



Generation cohorts



Regions

	2018	2022	Tracking
Brussels	**11%**	**11%**	→
South (French) Belgium	**34%**	**35%**	→
North (Flemish) Belgium	**55%**	**54%**	→

Annual household income before tax

	2018	2022	Tracking
Less than € 12,000	**3%**	**2%**	→
€ 12,000 - € 17,999	**9%**	**7%**	→
€ 18,000 - € 23,999	**9%**	**11%**	→
€ 24,000 - € 29,999	**12%**	**9%**	→
€ 30,000 - € 35,999	**12%**	**12%**	→
€ 36,000 - € 41,999	**11%**	**11%**	→
€ 42,000 - € 49,999	**8%**	**12%**	↑
More than € 50,000	**17%**	**19%**	→
I would prefer not to say	**19%**	**16%**	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

Q: What do market experts say?

"A female who is a wine drinker is becoming more and more socially accepted."

Importer, Belgium

Drinking Repertoire

Belgium Wine Landscapes

2022

Drinking repertoire

Key takeaways

1. Changing wine repertoires

When compared to 2018, a smaller proportion of regular wine drinkers report drinking red or white wines. Conversely, rosé wines have recruited new consumers. Champagne and Prosecco have been in recovery since 2020 and are winning back regular wine drinkers lost in recent years.

2. Country and regional awareness decreases

Awareness incidences for both countries and regions of origin have declined significantly between 2020 and 2022, highlighting the declining knowledge base among Belgium regular wine drinkers

Drinking repertoire

Decreasing penetration of white and red wine seems to have stabilised in the past two years

Champagne and Prosecco have experienced significant recoveries. The number who drink Prosecco is back to its pre-pandemic level. Noticeably, Cava hasn’t regained ground in the same way.

Q: What do market experts say?

“Cava is still huge in volume because nobody can beat the price of a Cava. But in Cava there is no growth because of the lack of innovation. With the low price point, there's not much investment in packaging and in concepts. Prosecco is doing well [by comparison].”

Importer, Belgium

Alcoholic beverage repertoire: Top 15 tracking

% who have drunk the following beverages in the past 12 months
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	White wine	85%	80%	81%	↓	→
2	Red wine	85%	77%	75%	↓	→
3	Beer	67%	71%	67%	→	→
4	Rosé wine	55%	63%	60%	↑	→
5	Cava	65%	53%	54%	↓	→
6	Champagne (French Champagne)	58%	47%	52%	↓	↑
7	Craft beer	40%	42%	40%	→	→
8	Prosecco	40%	31%	39%	→	↑
9	Cocktails	28%	28%	30%	→	→
10	Gin	27%	34%	29%	→	↓
11=	Rum	21%	26%	26%	↑	→
11=	Whisky / Whiskey	27%	28%	26%	→	→
13	Port	27%	27%	22%	↓	↓
14	Liqueurs	21%	22%	21%	→	→
15	Vodka	20%	22%	20%	→	→

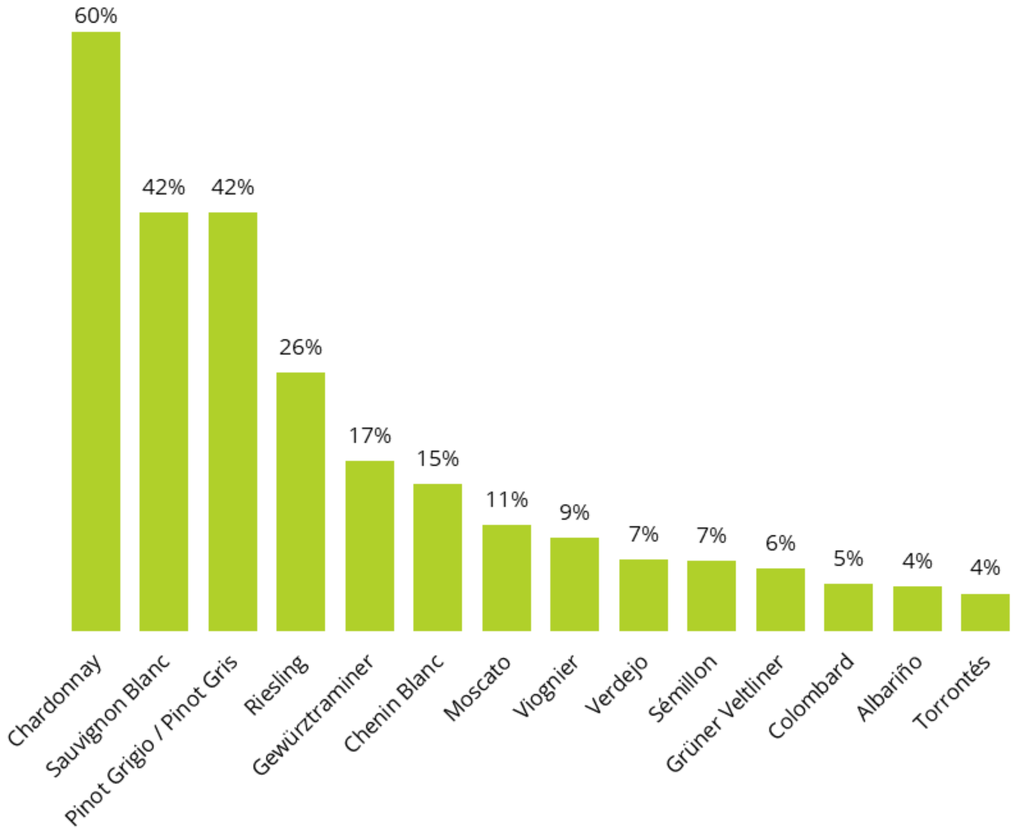
=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar ’18, Jul ’20, Apr ’22, (n≥819) Belgian regular wine drinkers

White varietal consumption

Few changes in regular wine drinkers' white varietal repertoires; Sauvignon Blanc recently lost ground and niche varietals such as Albariño, Colombard and Grüner Veltliner are on the up

White varietal consumption

% who have drunk the following varietals or wine types in the past six months
Base = All Belgian regular wine drinkers (n=1,004)



White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Chardonnay	63%	61%	60%	→	→
2=	Sauvignon Blanc	45%	48%	42%	→	↓
2=	Pinot Grigio / Pinot Gris	46%	41%	42%	→	→
4	Riesling	29%	23%	26%	→	→
5	Gewürztraminer	20%	15%	17%	→	→
6	Chenin Blanc	13%	14%	15%	→	→
7	Moscato	12%	11%	11%	→	→
8	Viognier	8%	7%	9%	→	→
9=	Verdejo	5%	7%	7%	→	→
9=	Sémillon	7%	7%	7%	→	→
11	Grüner Veltliner	4%	3%	6%	↑	↑
12	Colombard	3%	3%	5%	↑	→
13=	Albariño	2%	2%	4%	↑	↑
13=	Torrontés	3%	3%	4%	→	→

=Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

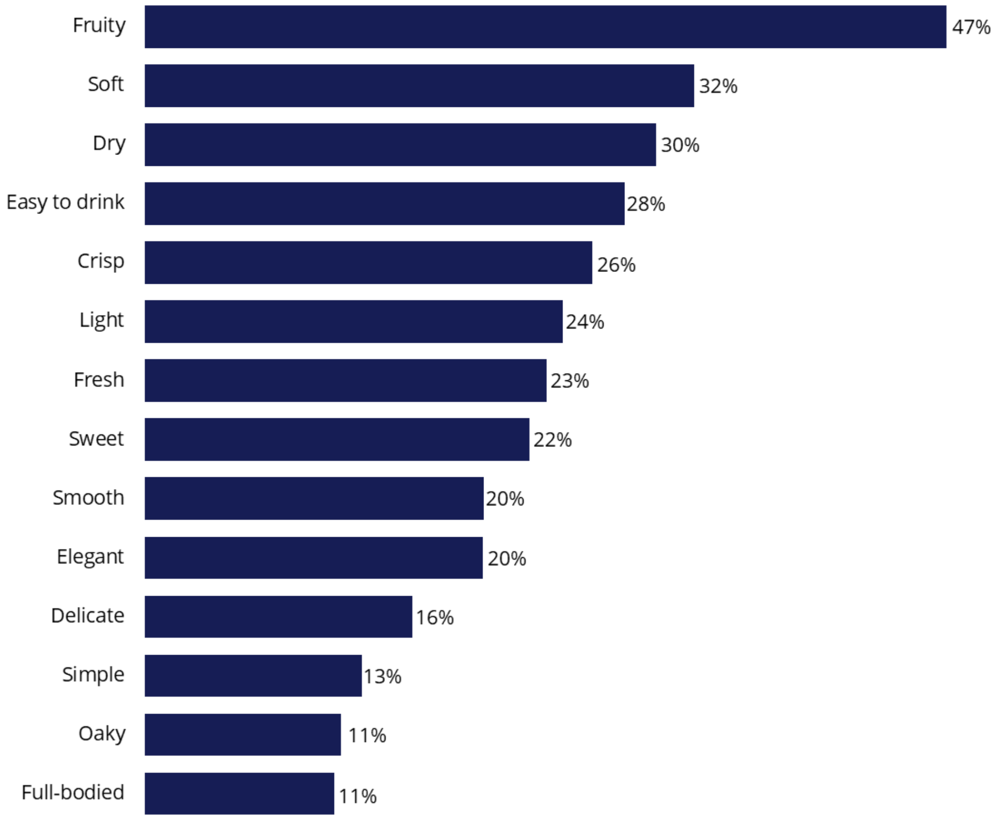
HOT TOPIC

White wine attributes

Almost half of Belgium regular wine drinkers say that their ideal white wine would feature fruity flavours

Ideal white wine attributes: Top 15

% who select each description for their ideal white wine
Base = All Belgian regular wine drinkers (n=1,004)



Demographic insights

- Gen Zs' ideal white wine palette differs in a number of ways from that of regular wine drinkers as a whole. More Gen Zs say their ideal white wine would be crisp (38% vs 26%), sweet (40% vs 22%), juicy (22% vs 8%) and mineral (17% vs 9%), while fewer said their ideal wine would be dry (17% vs 30%)
- The other three generation groupings' ideal white wines broadly align with regular wine, although there are some differences. Greater numbers of Millennials say their ideal wine would be juicy (13% vs 8%) and buttery (9% vs 5%) while more Boomers said that their ideal wine would be easy to drink (33% vs 28%)
- Significantly more male drinkers within the Belgium market say they like their ideal white wine to be oaky (15% vs 11%)

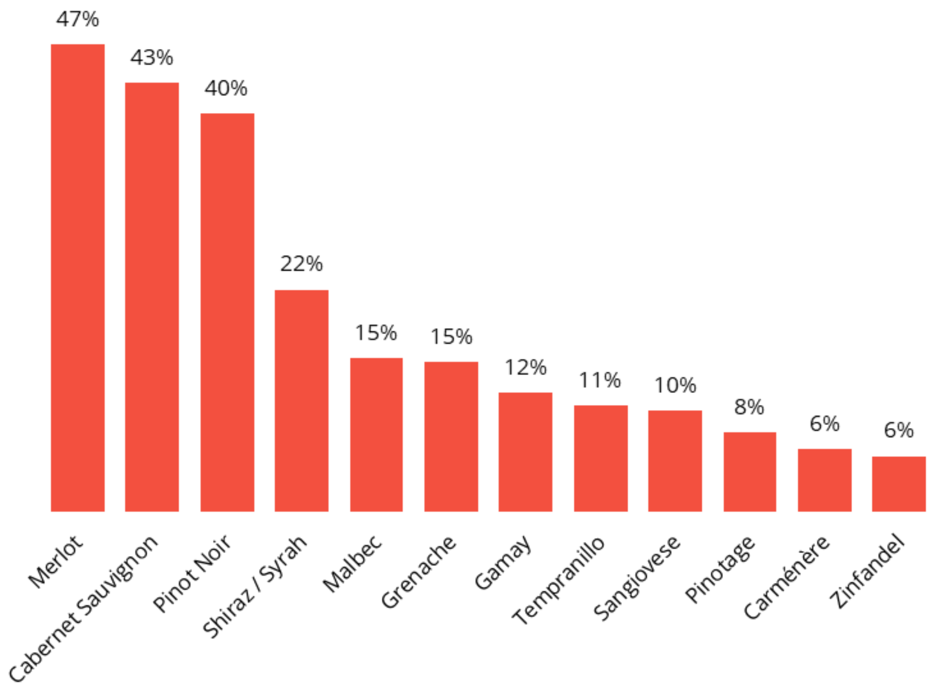
=Represents equal ranking
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Red varietal consumption

Several popular mainstream varietals have seen declines in their consumption incidences, while some niche varietals have had increases

Red varietal consumption

% who have drunk the following varietals or wine types in the past six months
Base = All Belgian regular wine drinkers (n=1,004)



Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Merlot	55%	50%	47%	↓	→
2	Cabernet Sauvignon	52%	50%	43%	↓	↓
3	Pinot Noir	44%	45%	40%	→	↓
4	Shiraz / Syrah	25%	26%	22%	→	↓
5=	Malbec	13%	14%	15%	→	→
5=	Grenache	15%	17%	15%	→	→
7	Gamay	10%	9%	12%	→	↑
8	Tempranillo	11%	10%	11%	→	→
9	Sangiovese	9%	9%	10%	→	→
10	Pinotage	5%	7%	8%	↑	→
11=	Carménère	5%	6%	6%	→	→
11=	Zinfandel	4%	3%	6%	→	↑

Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

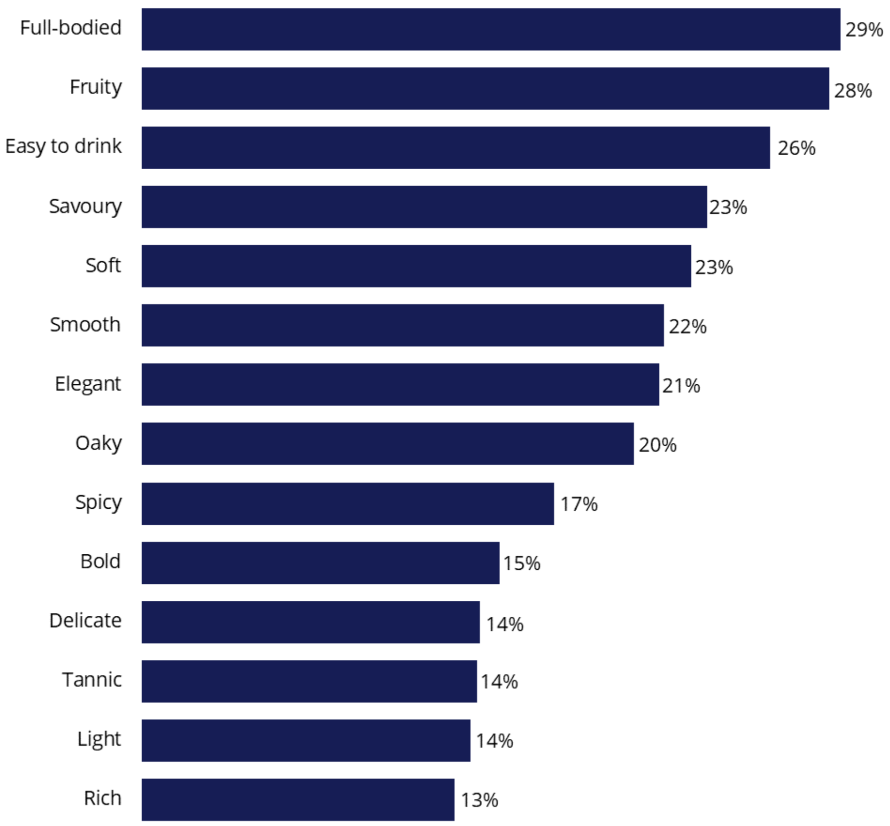
HOT TOPIC

Red wine attributes

Full-bodied, fruity and easy to drink are the most popular attributes; over a quarter of regular wine drinkers say that these are key attributes in their ideal red wine

Ideal red wine attributes: Top 15

% who select each description for their ideal red wine
Base = All Belgian regular wine drinkers (n=1,004)



Demographic insights

- Significantly more male drinkers within the Belgium market say their ideal red wine would be oaky (26% vs 20%), tannic (18% vs 14%), rich (17% vs 13%) and earthy (15% vs 11%) when compared to all regular wine drinkers
- Greater numbers of Gen Zs say their ideal red wine would be both juicy (19% vs 8%) and sweet (15% vs 8%) in comparison to all regular wine drinkers
- More Millennials describe their ideal red wine as complex (17% vs 12%) and sweet (15% vs 8%) against regular wine drinkers as a whole. Fewer Millennials say that their ideal red wine would be easy to drink (19% vs 26%), savoury (16% vs 23%), smooth (14% vs 22%), oaky (13% vs 20%) and tannic (7% vs 14%) compared to all regular wine drinkers
- More Gen Xs would include savoury (29% vs 23%) flavours in their ideal red wine, while a higher number of Boomers say their ideal red wine would be easy to drink (32% vs 26%), compared to all regular wine drinkers

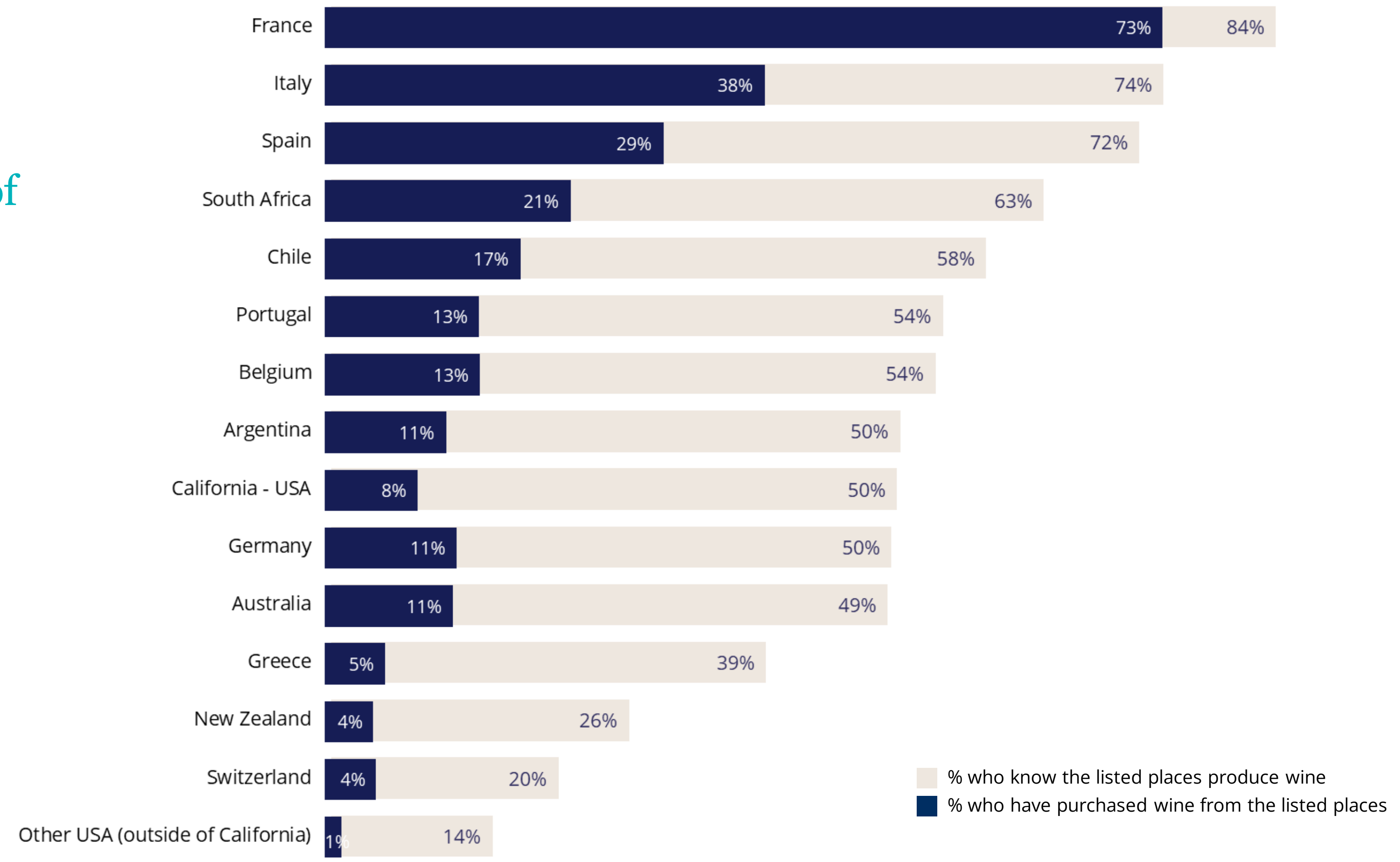
Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Country of origin consumption / awareness

France is the market leader: 73% of Belgian drinkers say they have consumed French wine within the past six months

Country of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following places
Base = All Belgian regular wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Country of origin awareness

Awareness rates have significantly decreased almost across the board, which suggests that consumers are focusing their attention on a narrower number of origins

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	France	94%	92%	84%	↓	↓
2	Italy	82%	82%	74%	↓	↓
3	Spain	80%	77%	72%	↓	↓
4	South Africa	73%	72%	63%	↓	↓
5	Chile	70%	68%	58%	↓	↓
6=	Portugal	61%	59%	54%	↓	↓
6=	Belgium	n/a	56%	54%	n/a	→
8=	Argentina	58%	52%	50%	↓	→
8=	California - USA	55%	52%	50%	↓	→
8=	Germany	60%	55%	50%	↓	↓
11	Australia	59%	58%	49%	↓	↓
12	Greece	n/a	39%	39%	n/a	→
13	New Zealand	27%	30%	26%	→	→
14	Switzerland	24%	21%	20%	→	→
15	Other USA (outside of California)	24%	23%	14%	↓	↓

n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Country of origin consumption

Belgium regular wine drinkers are narrowing the range of countries of origins they say they are consuming. Many popular countries experience lower consumption incidences compared to 2018

Q: What do market experts say?

"The supply chain is a big issue, especially from Chile and South Africa, where there are big delays on transports."

Importer, Belgium

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	France	84%	81%	73%	↓	↓
2	Italy	43%	39%	38%	↓	→
3	Spain	36%	33%	29%	↓	→
4	South Africa	27%	26%	21%	↓	↓
5	Chile	25%	24%	17%	↓	↓
6=	Belgium	n/a	12%	13%	n/a	→
6=	Portugal	14%	13%	13%	→	→
8=	Germany	17%	10%	11%	↓	→
8=	Australia	11%	11%	11%	→	→
8=	Argentina	13%	10%	11%	→	→
11	California - USA	8%	7%	8%	→	→
12	Greece	n/a	5%	5%	n/a	→
13=	Switzerland	3%	2%	4%	→	↑
13=	New Zealand	3%	4%	4%	→	→
15=	Other USA (outside of California)	2%	1%	1%	→	→

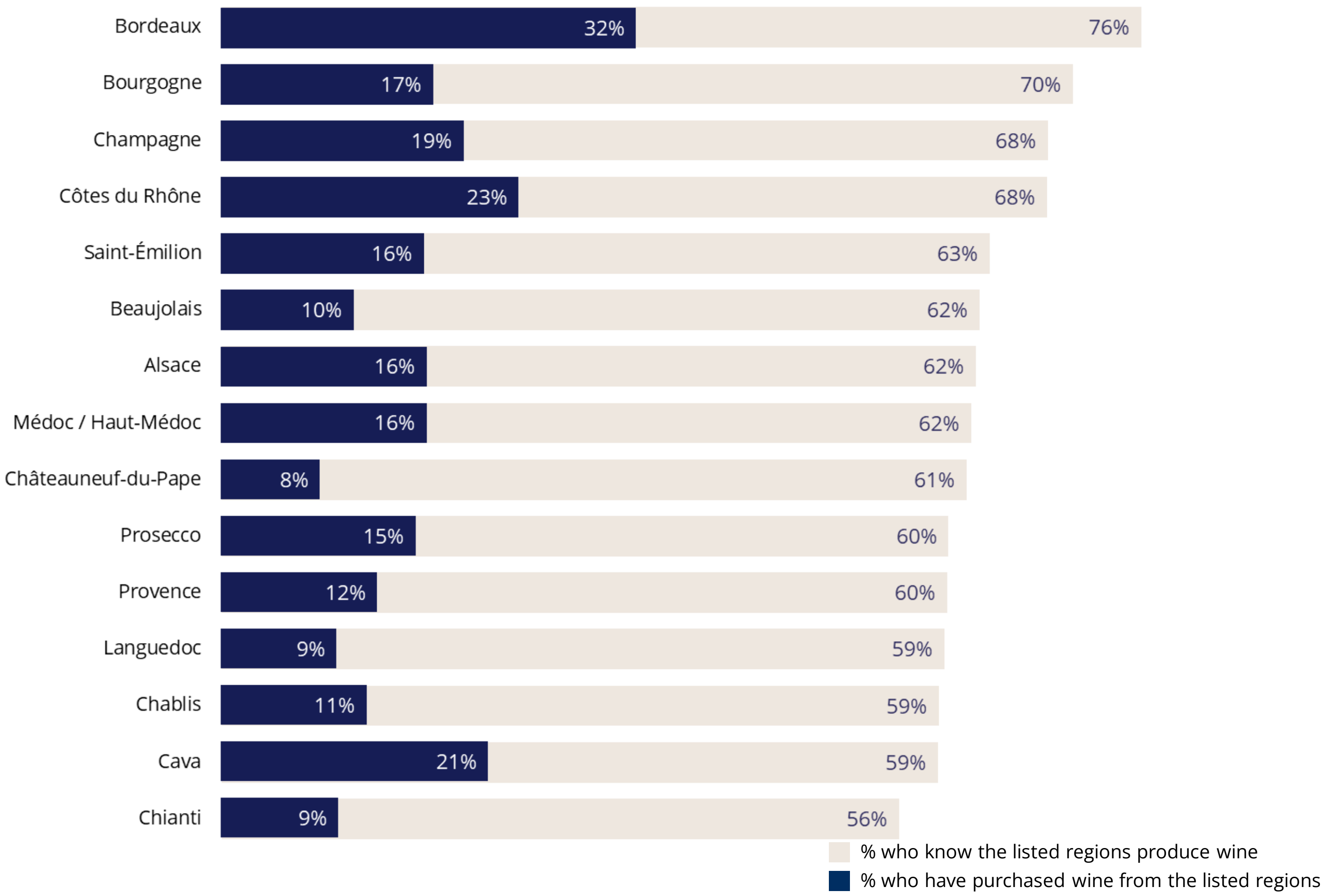
n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Region of origin consumption / awareness

French regions of origin feature prominently among Belgium regular wine drinkers; although Cava performs strongly on purchase incidence, on a par with Champagne

Region of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following regions
Base = All Belgian regular wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Region of origin awareness

Mainstream regions of origins have experienced sharp declines in awareness, indicating that consumers knowledge levels are down

Region of origin awareness: Top 15 tracking

% of those who know the following regions produce wine
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Bordeaux	89%	90%	76%	⬇	⬇
2	Bourgogne	82%	82%	70%	⬇	⬇
3=	Champagne	82%	83%	68%	⬇	⬇
3=	Côtes du Rhône	82%	77%	68%	⬇	⬇
5	Saint-Émilion	77%	72%	63%	⬇	⬇
6=	Beaujolais	76%	74%	62%	⬇	⬇
6=	Alsace	76%	74%	62%	⬇	⬇
6=	Médoc / Haut-Médoc	73%	76%	62%	⬇	⬇
9	Châteauneuf-du-Pape	75%	71%	61%	⬇	⬇
10=	Prosecco	68%	68%	60%	⬇	⬇
10=	Provence	67%	68%	60%	⬇	⬇
12=	Languedoc	70%	65%	59%	⬇	⬇
12=	Chablis	69%	68%	59%	⬇	⬇
12=	Cava	72%	69%	59%	⬇	⬇
15	Chianti	65%	64%	56%	⬇	⬇

= Represents equal ranking
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Region of origin consumption

Established French regions of origins and Cava have seen their purchase incidences decline compared to their 2018 levels suggesting that consumers are focusing on a narrower portfolio of wines

Region of origin consumption: Top 15, tracking

% who have bought wine from the following wine-producing regions in the past three months
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Bordeaux	**42%**	**39%**	**32%**	⬇	⬇
2	Côtes du Rhône	**28%**	**24%**	**23%**	⬇	➡
3	Cava	**26%**	**20%**	**21%**	⬇	➡
4	Champagne	**24%**	**18%**	**19%**	⬇	➡
5	Bourgogne	**20%**	**16%**	**17%**	⬇	➡
6=	Médoc / Haut-Médoc	**16%**	**15%**	**16%**	➡	➡
6=	Alsace	**17%**	**14%**	**16%**	➡	➡
6=	Saint-Émilion	**20%**	**14%**	**16%**	⬇	➡
9	Prosecco	**19%**	**17%**	**15%**	⬇	➡
10	Provence	**10%**	**13%**	**12%**	➡	➡
11=	Chablis	**14%**	**12%**	**11%**	➡	➡
11=	Vin de Pays d'Oc	**11%**	**12%**	**11%**	➡	➡
13	Beaujolais	**14%**	**11%**	**10%**	⬇	➡
14=	Tuscany	**8%**	**8%**	**9%**	➡	➡
14=	Rioja	**12%**	**10%**	**9%**	➡	➡

= Represents equal ranking

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Wine-buying Behaviours

Belgium Wine Landscapes

2022

Wine-buying behaviours

Key takeaways

1. Premiumisation of the wine market

Regular wine drinkers report increasing typical spend across almost all occasions in both the off and on-trade

2. More wine drinking in bars

Wine consumption penetration in bars now exceeds pre-pandemic levels with 38% of regular wine drinkers reporting that they have had wine in a bar, up from was 32% in 2018.

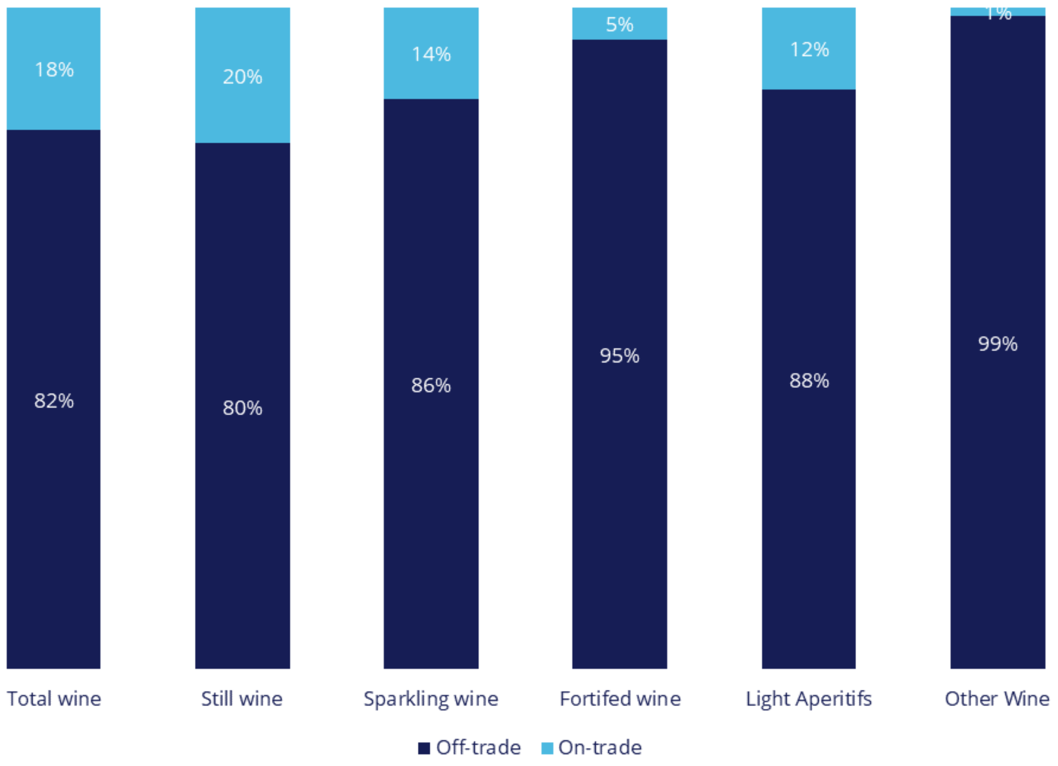
3. Changing retail landscapes

Regular wine drinkers' purchase occasions from Colruyt and Delhaize have declined significantly since 2018, with greater numbers now buying in medium-sized and small retailers

Off- vs on-trade consumption

20% of still wines are consumed in the on-trade, more than the 14% of sparkling wines

Share of consumption by volume



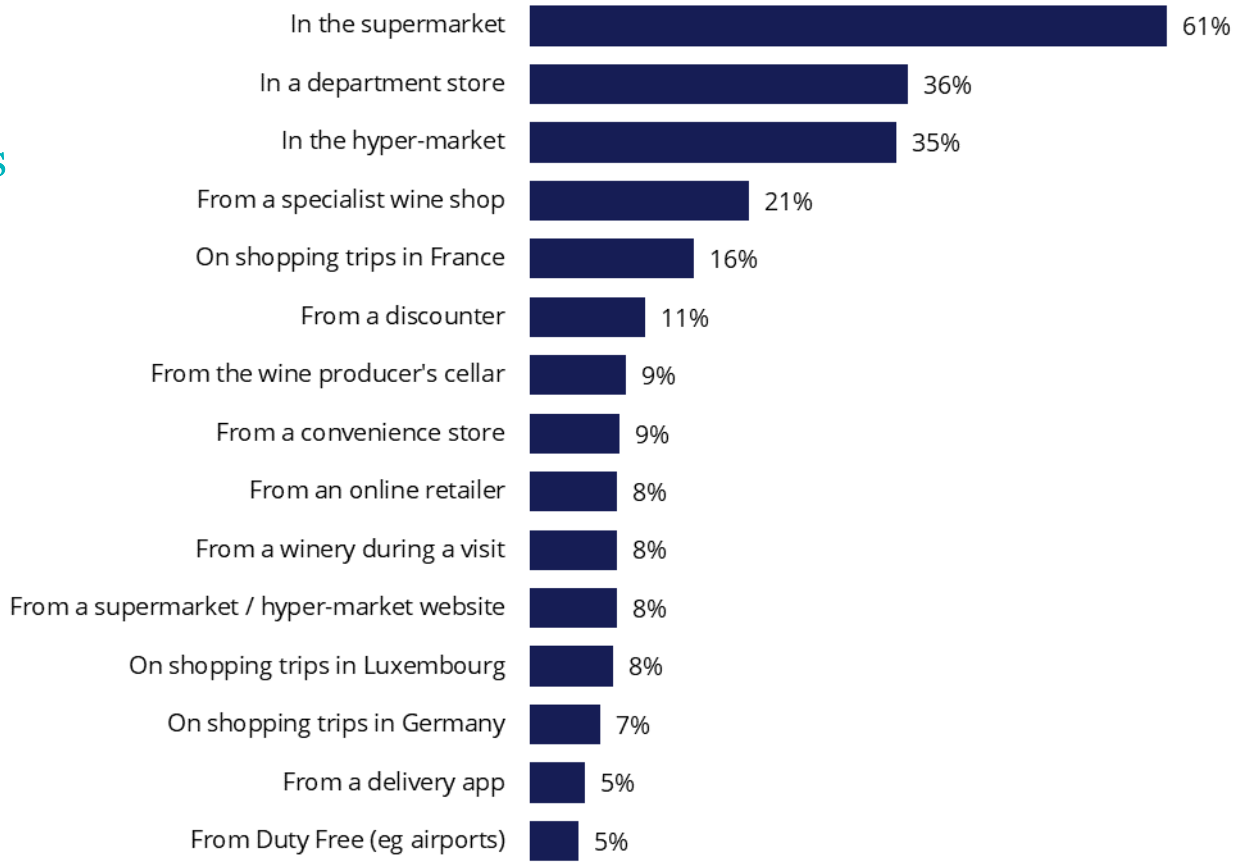
Source: IWSR

Wine-buying channel usage

Three in five Belgium regular wine drinkers have purchased wine in a supermarket in the past six months

Wine-buying channel usage

% who have bought wine from the following channels in the past six months
Base = All Belgian regular wine drinkers (n=1,004)



Q: What do market experts say?

"We have two or three good supermarket chains which do a very good job in wines, with good coverage across the board. So it's pretty much a wine paradise, as a shopper."

Sommelier, Belgium

Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Wine-buying channel usage

Supermarket penetration has returned to pre-pandemic level; noticeably, shopping trips into Germany and Luxembourg are on the up

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	In the supermarket	61%	66%	61%	→	↓
2	In a department store	39%	35%	36%	→	→
3	In the hyper-market	33%	33%	35%	→	→
4	From a specialist wine shop	26%	21%	21%	↓	→
5	On shopping trips in France	18%	13%	16%	→	→
6	From a discounter	8%	11%	11%	→	→
7=	From the wine producer's cellar	11%	10%	9%	→	→
7=	From a convenience store	6%	7%	9%	↑	→
9=	From an online retailer (other than a supermarket / hyper-market website)	n/a	n/a	8%	n/a	n/a
9=	From a winery during a visit	n/a	n/a	8%	n/a	n/a
9=	From a supermarket / hyper-market website	n/a	n/a	8%	n/a	n/a
9=	On shopping trips in Luxembourg	5%	3%	8%	↑	↑
13	On shopping trips in Germany	4%	3%	7%	↑	↑
14=	From a delivery app	n/a	n/a	5%	n/a	n/a
14=	From Duty Free (eg airports)	3%	2%	5%	↑	↑

17% are online wine buyers

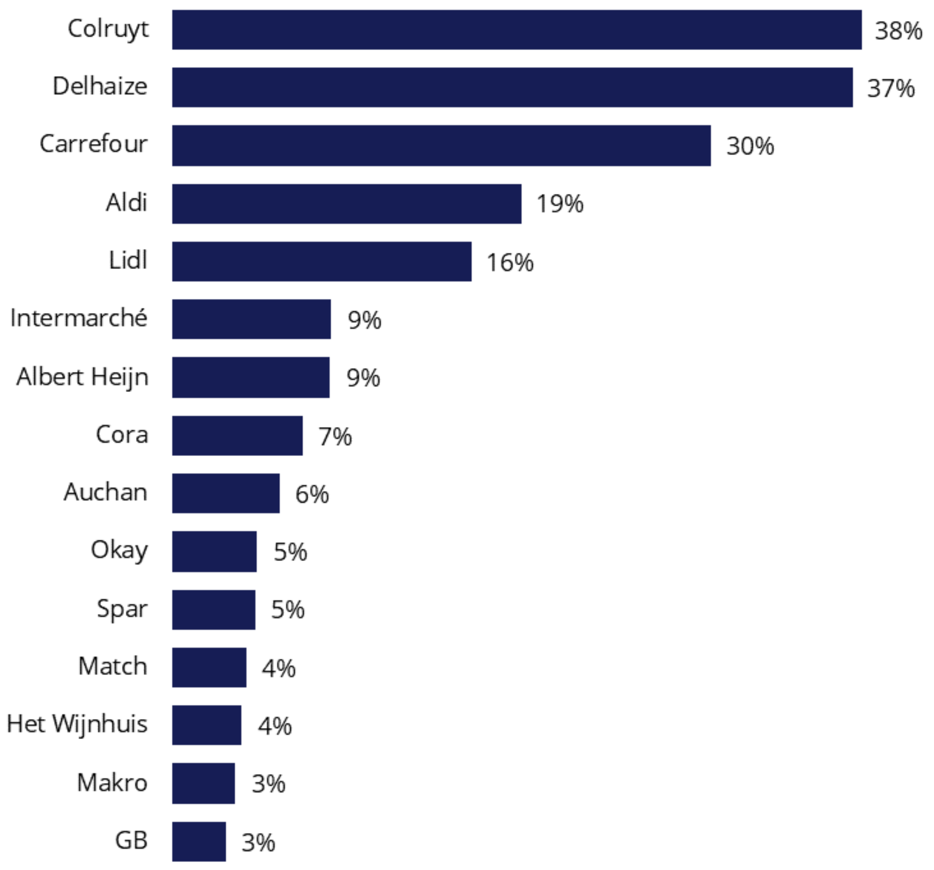
n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Wine-buying retailer usage

More than one in three regular wine drinkers say they shop for wine in Colruyt and Delhaize

Wine-buying retailer usage: Top 15

% who mainly use the following retailers to buy wine
Base = All Belgian regular wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Wine-buying retailer usage

Both Colruyt and Delhaize have lost ground in recent years and their penetration rates are below pre-pandemic levels. Smaller retailers have recruited new wine shoppers, especially Intermarché and Auchan

Wine-buying retailer usage: Tracking

% who mainly use the following retailers to buy wine
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Colruyt	45%	45%	38%	↓	↓
2	Delhaize	42%	41%	37%	↓	→
3	Carrefour	31%	32%	30%	→	→
4	Aldi	17%	16%	19%	→	→
5	Lidl	15%	14%	16%	→	→
6=	Intermarché	4%	4%	9%	↑	↑
6=	Albert Heijn	5%	7%	9%	↑	→
8	Cora	6%	5%	7%	→	→
9	Auchan	n/a	3%	6%	n/a	↑
10=	Okay	3%	5%	5%	→	→
10=	Spar	3%	4%	5%	→	→
12=	Match	4%	2%	4%	→	↑
12=	Het Wijnhuis	3%	2%	4%	→	↑
14=	Makro	4%	3%	3%	→	→
14=	GB	5%	3%	3%	→	→
16	Comptoir des Vins	1%	1%	2%	→	↑
17=	Leader Price	1%	0%	1%	→	↑
17=	Eurospar	1%	1%	1%	→	→

n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Consumption frequency

The frequency of consumption by Belgium regular wine drinkers has been unaffected by the pandemic and is almost identical to 2018 levels

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Belgian regular wine drinkers (n≥819)

	2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	vs. '20
Most days / every day	14%	14%	14%	➡	➡
2-5 times a week	25%	26%	29%	➡	➡
About once a week	35%	35%	33%	➡	➡
1-3 times a month	26%	25%	24%	➡	➡

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Belgian regular wine drinkers (n=1,004)

	Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
Most days / every day	14%	18%	13%	12%	16%
2-5 times a week	29%	25%	31%	29%	27%
About once a week	33%	39%	30%	33%	33%
1-3 times a month	24%	18%	26%	26%	24%

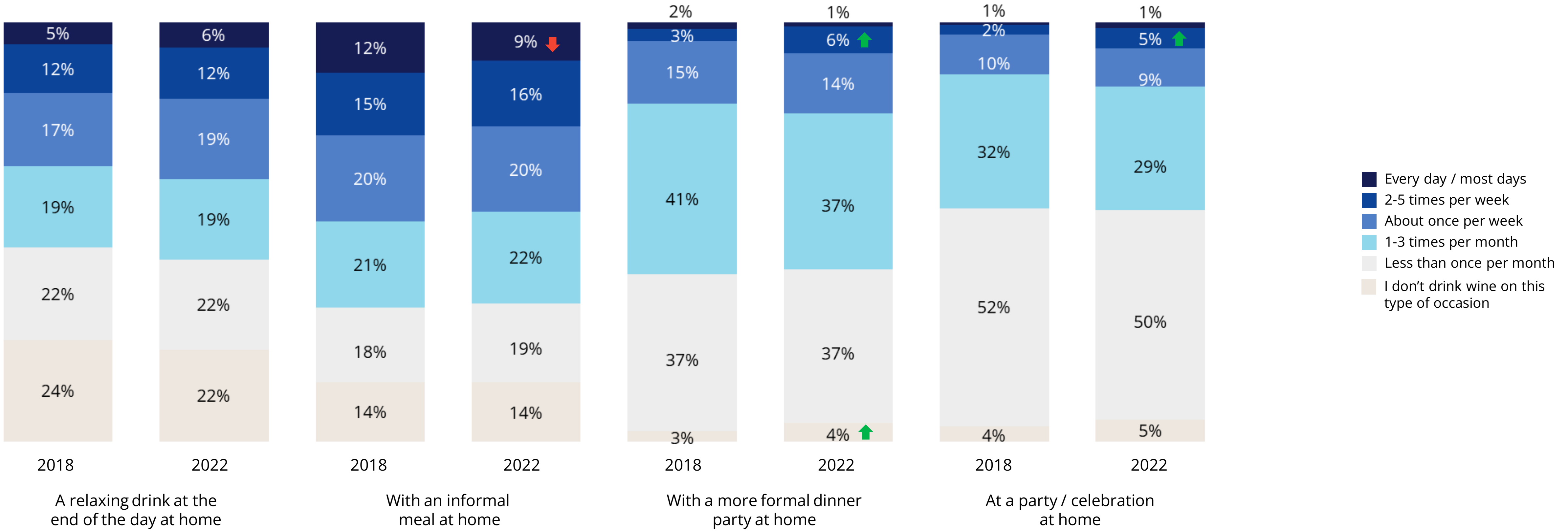
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Off-trade consumption frequency

Informal settings remain the most popular and dominate purchases

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

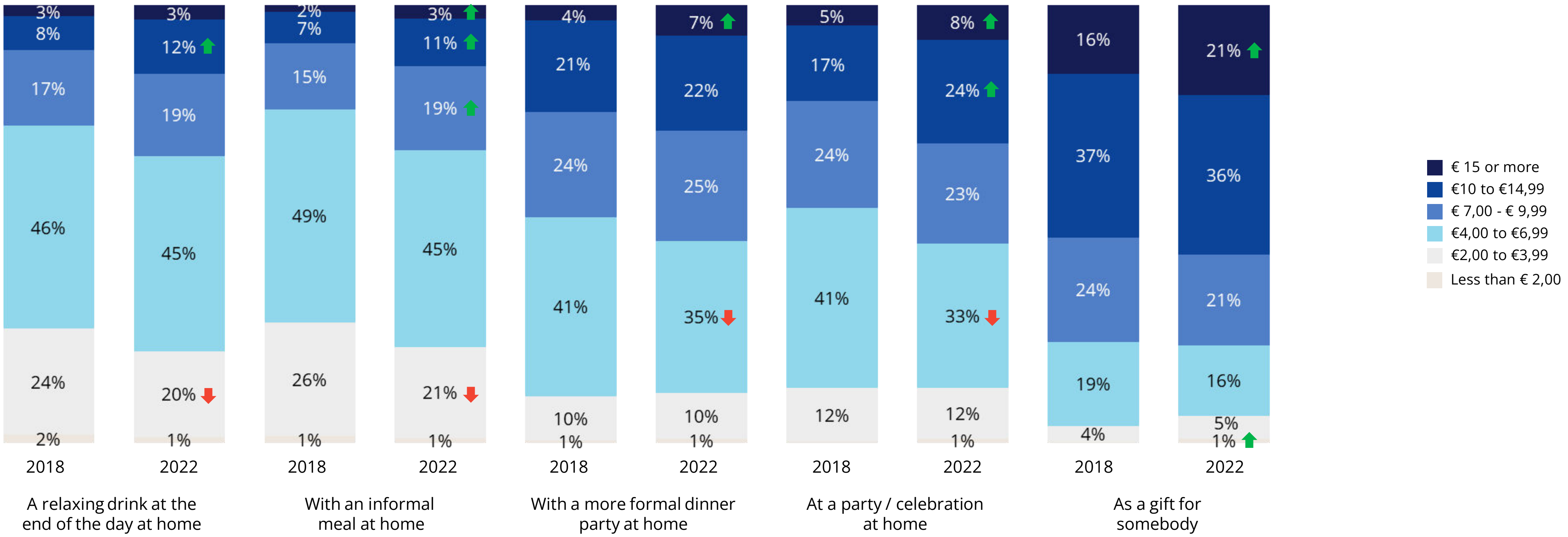
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

Off-trade spend

Higher prices are being paid across most occasions, while low-price and mid-price purchases are down

Off-trade: Wine spend per bottle by occasion

Base = Those who buy wine in the off-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

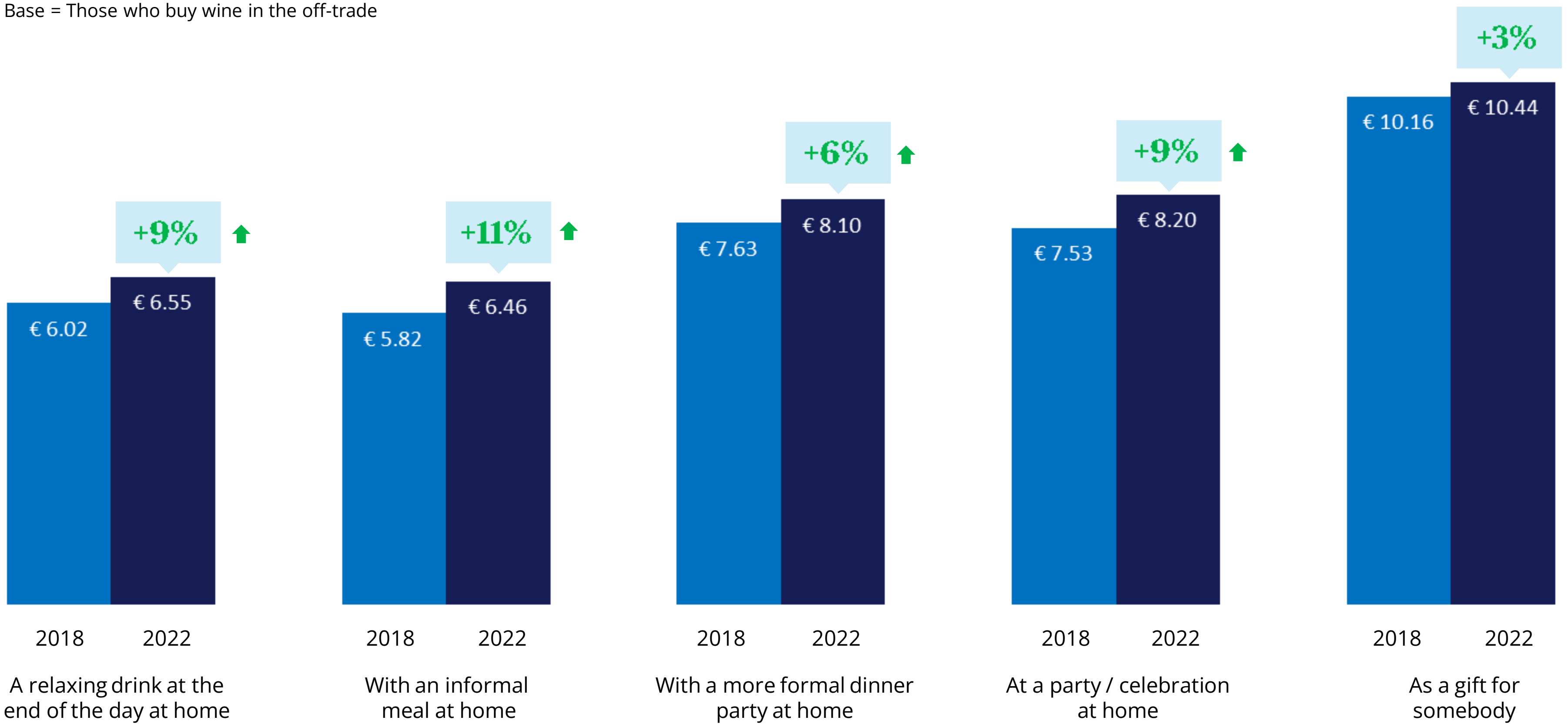
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

Average off-trade spend

The stated typical spend has significantly increased across all occasions

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the off-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

On-trade consumption

Significantly greater numbers of regular wine drinkers are consuming wine in bars compared to pre-pandemic levels. Wine consumption in these types of settings is driven by younger consumers

Wine purchase in on-trade

% who buy wine in a bar, pub or restaurant
Base = All Belgian regular wine drinkers (n≥819)

On-trade location		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
Bar	Yes	32%	30%	38%	⬆	⬆
	No	68%	70%	62%	⬇	⬇
Restaurant	Yes	79%	77%	77%	➡	➡
	No	21%	23%	23%	➡	➡

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Belgian regular wine drinkers (n=1,004)

On-trade location		Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
Bar	Yes	38%	66%	57%	39%	24%
	No	62%	34%	43%	61%	76%
Restaurant	Yes	77%	85%	88%	81%	67%
	No	23%	15%	12%	19%	33%

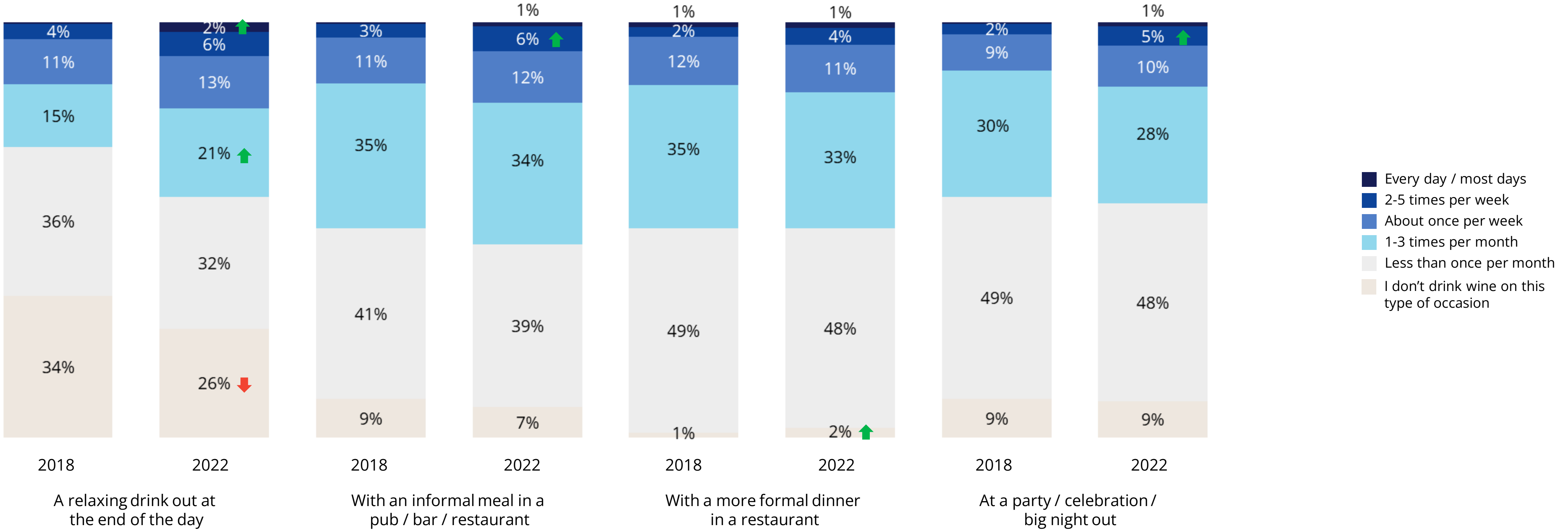
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

On-trade consumption frequency

Consumers have significantly increased their daily consumption of wine to wind down

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

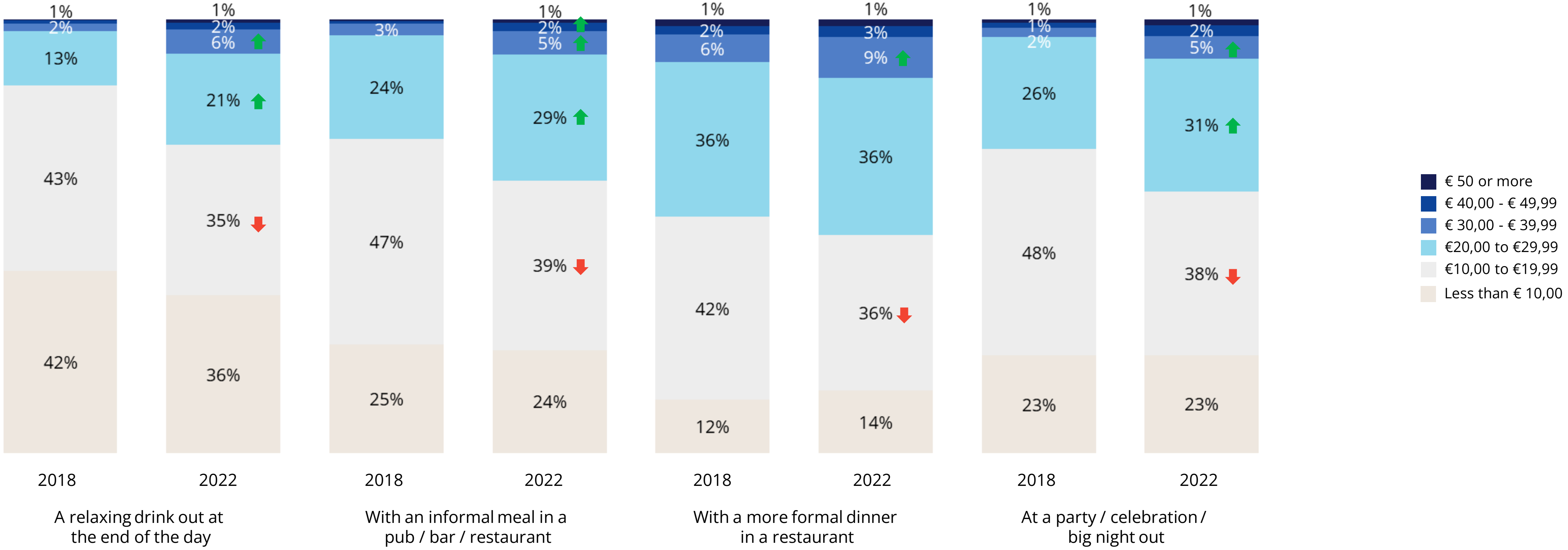
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

On-trade spend

Stated typical spend is on the up across all on-trade occasions

On-trade: Wine spend per bottle by occasion

Base = Those who buy wine in the on-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

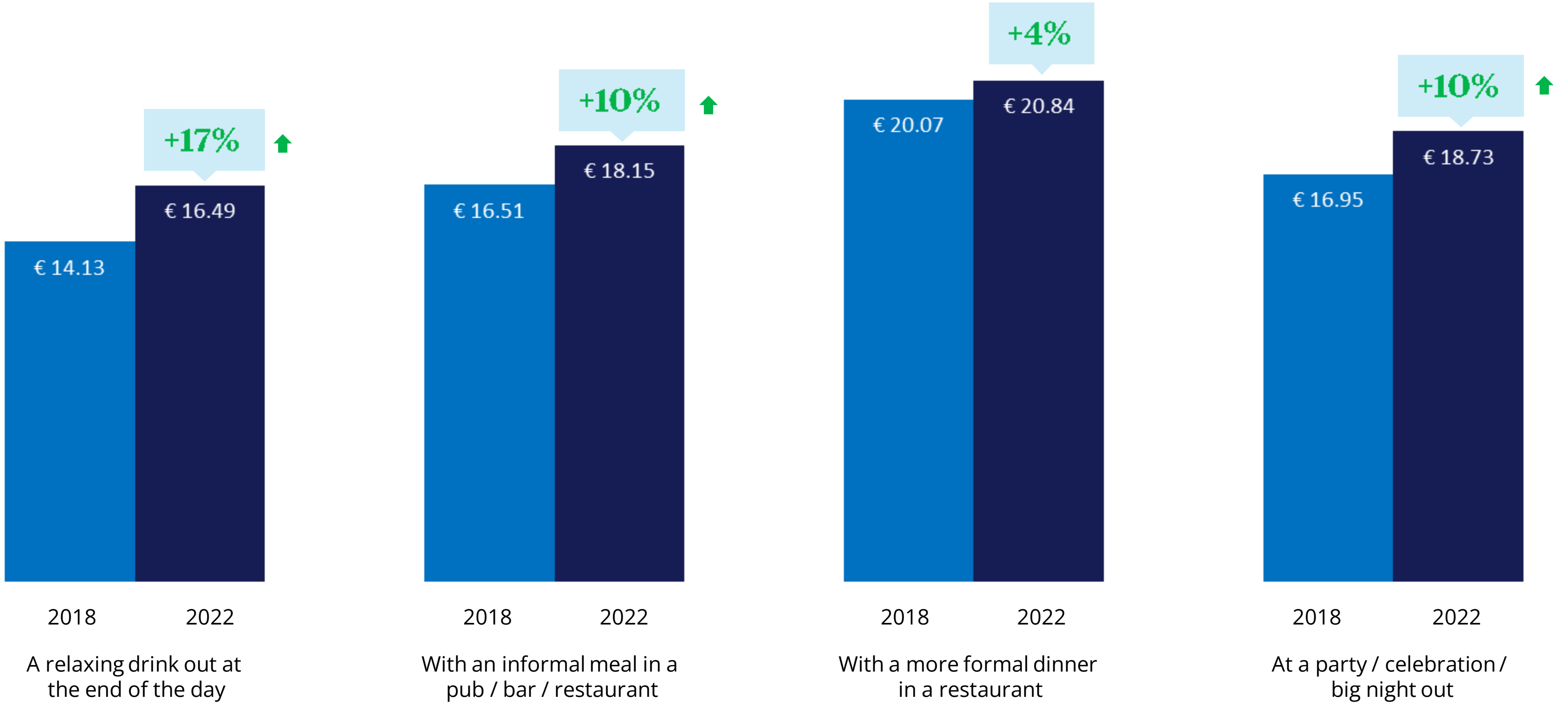
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

Typical on-trade spend

The typical spend for a relaxing drink at the end of the day has risen significantly

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Apr '22, (n≥819) Belgian regular wine drinkers

Wine Views and Attitudes

Belgium Wine Landscapes

2022

Wine views and attitudes

Key takeaways

1. Shrinking knowledge among regular wine drinkers

While wine drinkers' confidence has remained stable, there has been a decline in the knowledge base of regular wine drinkers in Belgium

2. Fewer associate wine with drinking for pleasure

77% of regular wine drinkers state that drinking wine gives them pleasure. That's high but down compared to 2018 when it was 84%. In the same period, a higher proportion of consumers now perceive wine as being expensive.

Attitudes towards wine

The majority of Gen Z and Millennial wine drinkers are seeking to experiment with their choice of wine; Boomers are less likely to do so and prefer to stick with habitual purchases

Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Belgian regular wine drinkers (n≥819)

	2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
I enjoy trying new and different styles of wine on a regular basis	48%	48%	48%	➡	➡
I don't mind what I buy so long as the price is right	16%	15%	17%	➡	➡
I know what I like and I tend to stick to what I know	37%	37%	34%	➡	➡

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Belgian regular wine drinkers (n=1,004)

	Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
I enjoy trying new and different styles of wine on a regular basis	48%	63%	65%	51%	36%
I don't mind what I buy so long as the price is right	17%	27%	22%	16%	14%
I know what I like and I tend to stick to what I know	34%	10%	13%	34%	50%

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Wine involvement

The level of involvement with the wine category has remained stable in recent years

Wine involvement: Tracking

Base = All Belgian regular wine drinkers (n≥819)

	2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
High involvement	**36%**	**32%**	**32%**	➡	➡
Medium involvement	**40%**	**43%**	**41%**	➡	➡
Low involvement	**25%**	**25%**	**27%**	➡	➡

Wine involvement by generation

Base = All Belgian regular wine drinkers (n=1,004)

	Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
High involvement	**32%**	**33%**	**26%**	**29%**	**27%**
Medium involvement	**41%**	**45%**	**38%**	**39%**	**42%**
Low involvement	**27%**	**22%**	**36%**	**32%**	**31%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Involvement and perceived expertise (1)

Fewer consumers describe themselves as drinking wine for pleasure and more perceive it as an expensive drink; these trends suggest that the wine category may be losing ground in perceived value for money

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Drinking wine gives me pleasure	84%	83%	77%	↓	↓
2	I always look for the best quality wines I can get for my budget	75%	78%	73%	→	↓
3	Deciding which wine to buy is an important decision	64%	61%	61%	→	→
4	I like to take my time when I purchase a bottle of wine	60%	60%	59%	→	→
5	I have a strong interest in wine	46%	46%	47%	→	→
6	Wine is important to me in my lifestyle	47%	44%	45%	→	→
7	Compared to others, I know less about the subject of wine	38%	39%	44%	↑	→
8	Generally speaking, wine is reasonably priced	35%	35%	38%	→	→
9	I don't understand much about wine	30%	32%	36%	↑	→
10	Generally speaking, wine is an expensive drink	30%	30%	35%	↑	↑
11	I feel competent about my knowledge of wine	21%	20%	26%	↑	↑

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Involvement and perceived expertise (2)

Millennial wine drinkers seem to be a fragmented group: a larger proportion don't feel they have expertise in wine and yet a higher proportion also feel confident about their knowledge relative to all regular wine drinkers

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Belgian regular wine drinkers (n=1,004)

Ranking '22		Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
1	Drinking wine gives me pleasure	77%	61%	71%	78%	80%
2	I always look for the best quality wines I can get for my budget	73%	57%	68%	74%	77%
3	Deciding which wine to buy is an important decision	61%	59%	62%	59%	61%
4	I like to take my time when I purchase a bottle of wine	59%	56%	62%	61%	56%
5	I have a strong interest in wine	47%	42%	52%	49%	45%
6	Wine is important to me in my lifestyle	45%	46%	52%	42%	43%
7	Compared to others, I know less about the subject of wine	44%	49%	53%	39%	41%
8	Generally speaking, wine is reasonably priced	38%	46%	48%	39%	32%
9	I don't understand much about wine	36%	49%	45%	35%	30%
10	Generally speaking, wine is an expensive drink	35%	37%	43%	35%	30%
11	I feel competent about my knowledge of wine	26%	25%	39%	30%	18%

= Represents equal ranking

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Wine knowledge and confidence

Knowledge among Belgium regular wine drinkers significantly decreased between 2020 and 2022 while confidence remained stable in the same period

Wine knowledge index: Tracking

Base = All Belgian regular wine drinkers (n≥819)

	2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
Knowledge Index	37.2	37.2	33.3	⬇	⬇

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

-3.9 Index change

Wine confidence index: Tracking

Base = All Belgian regular wine drinkers (n≥819)

	2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
Confidence Index	46.5	45.3	45.8	➡	➡

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

-0.7 Index change

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Wine-drinking motivations

Millenials are the group most likely to be attracted to wine by the status it may bring; but only 31% of them are motivated by food-matching, against 50% of Gen Zs and 63% of Boomers

Wine drinking motivations

% who selected the following as reasons why they drink wine
Base = All Belgian regular wine drinkers (n=1,004)

Ranking '22		Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
1	To celebrate special occasions	54%	43%	44%	55%	59%
2=	Wine enhances food and meals	50%	33%	31%	50%	63%
2=	I really love the taste of wine	50%	33%	41%	53%	55%
4	Wine is about sharing with a partner / close friend or family member	45%	45%	34%	44%	51%
5=	Drinking wine makes me feel relaxed	44%	27%	42%	49%	45%
5=	Wine helps create a warm / friendly atmosphere	44%	35%	33%	45%	50%
7	Wine is about sharing something with others	43%	52%	33%	43%	47%
8	I like learning about new wines	30%	22%	31%	35%	28%
9	I treat myself with wine at the end of the day	28%	24%	29%	30%	26%
10	Drinking wine can be good for my health	24%	14%	15%	22%	31%
11	Most of my friends drink wine	22%	23%	23%	21%	22%
12	I like shopping / choosing wines to drink	20%	27%	18%	19%	21%
13	Wine is a refreshing drink	13%	21%	19%	12%	9%
14	It makes people sophisticated	11%	15%	18%	13%	6%
15=	It makes me feel individual and unique	9%	17%	13%	8%	7%
15=	Wine is a fashionable drink	9%	27%	14%	7%	4%

Q: What do market experts say?

'Younger people don't drink everyday but when they drink wine, they want it for a special occasions. They drink less frequently, but they drink better or at least they spend more I. Their parents and grandparents though will have wine with lunch or with a dinner – wine and food was always linked.'

Importer, Belgium

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Wine-buying choice cues

Most important wine-buying cues have remained reasonably stable; recommendations by shop staff or leaflets have been gaining importance from a lower base, as has alcohol content

Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Wine that matches or complements food	75%	75%	75%	→	→
2	Grape variety (eg Cabernet Sauvignon, Chardonnay, etc)	66%	71%	70%	→	→
3	A brand I am aware of	67%	68%	68%	→	→
4=	The country of origin (eg France, Australia, Spain, Chile, USA, etc)	66%	67%	65%	→	→
4=	Promotional offer (eg price discount or 3 for the price of 2)	62%	61%	65%	→	→
6=	Taste or wine style descriptions displayed on the shelves or on wine labels	60%	62%	63%	→	→
6=	The region of origin	65%	66%	63%	→	→
8	Recommendation by friend or family	63%	59%	59%	→	→
9	Recommendations from shop staff or shop leaflets	36%	34%	45%	↑	↑
10	Recommendation by wine critic or writer	43%	41%	42%	→	→
11	Recommendation by wine guide books	40%	39%	40%	→	→
12	Appeal of the bottle and / or label design	35%	37%	38%	→	→
13	Alcohol content	25%	27%	37%	↑	↑
14	Whether or not the wine has won a medal or award	34%	31%	35%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Hot Topic: Wine Packaging and Closures

Belgium Wine Landscapes

2022

Wine packaging and closures

Key takeaways

1. Millennials are the most interested by alternative packaging formats

Both single serve bottles and magnums have a significantly higher purchase incidence among Millennials when compared to all regular wine drinkers.

2. Screw-caps and synthetic corks have better perceptions

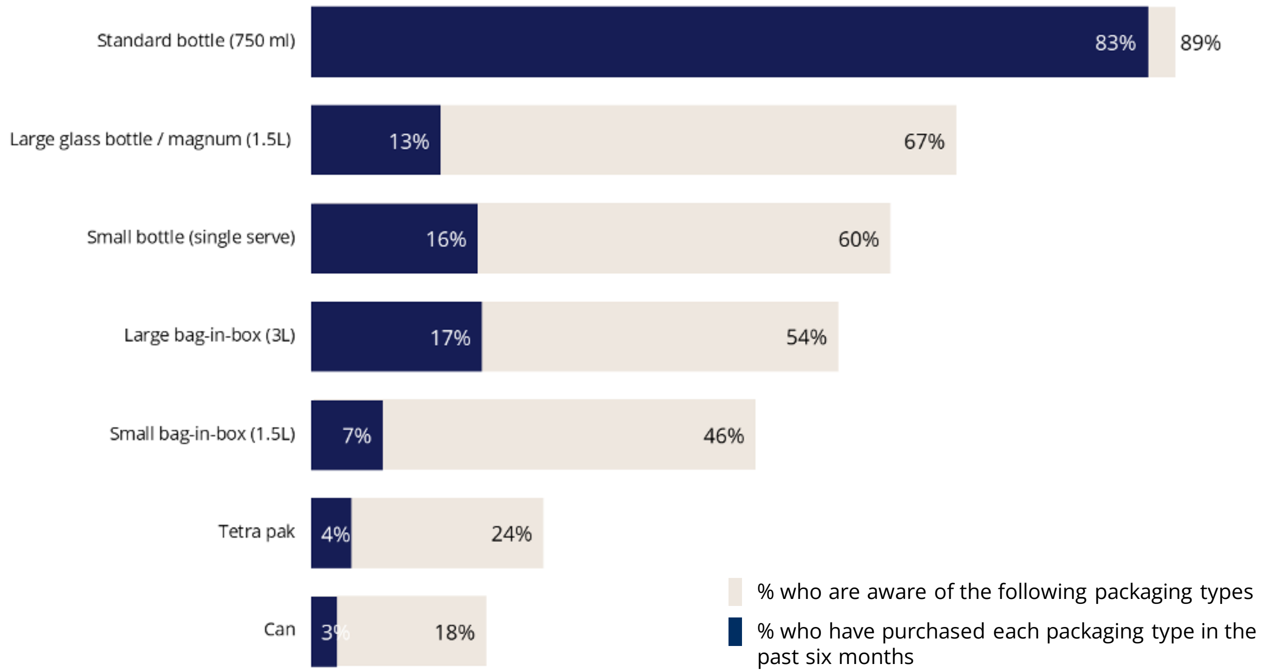
Significantly more Belgian regular wine drinkers report that they like purchasing screw-cap and synthetic corks when compared with 2018.

Packaging type consumption / awareness

Magnums, 3-litre bag-in-box and small bottles reach in the region of 15% of the regular wine drinking population

Packaging types: Awareness and consumption levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All Belgian regular wine drinkers (n=1,004)



Source: IWSR estimate
Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Packaging purchase and conversion

Significantly more Millennials are purchasing single serve bottles and magnums, while greater numbers of Gen Xs buy small big-in-box and cans

Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All Belgian regular wine drinkers (n=1,004)

Ranking '22		Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
1	Standard bottle (750 ml)	83%	63%	72%	87%	88%
2	Large bag-in-box (3L)	17%	10%	13%	21%	18%
3	Small bottle (single serve)	16%	22%	23%	17%	12%
4	Large glass bottle / magnum (1.5L)	13%	20%	22%	16%	5%
5	Small bag-in-box (1.5L)	7%	5%	9%	12%	3%
6	Tetra pak	4%	7%	4%	6%	2%
7	Can	3%	2%	4%	5%	0%

Packaging conversion: by generation

% who are aware of and have purchased wine in the following packaging types
Base = All Belgian regular wine drinkers (n=1,004)

Ranking '22		Regular Wine Drinkers (n=1,004)	18-24 Gen Z (n=59)	25-39 Millennials (n=231)	40-54 Gen X (n=279)	55+ Boomers (n=434)
1	Standard bottle (750 ml)	93%	87%	92%	94%	92%
2	Large bag-in-box (3L)	31%	27%	33%	34%	29%
3	Small bottle (single serve)	28%	36%	39%	26%	21%
4	Large glass bottle / magnum (1.5L)	19%	38%	36%	22%	7%
5	Small bag-in-box (1.5L)	17%	35%	23%	25%	9%
6=	Tetra pak	15%	13%	23%	22%	7%
6=	Can	15%	17%	35%	22%	1%

Grey shading = sample size below 50
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

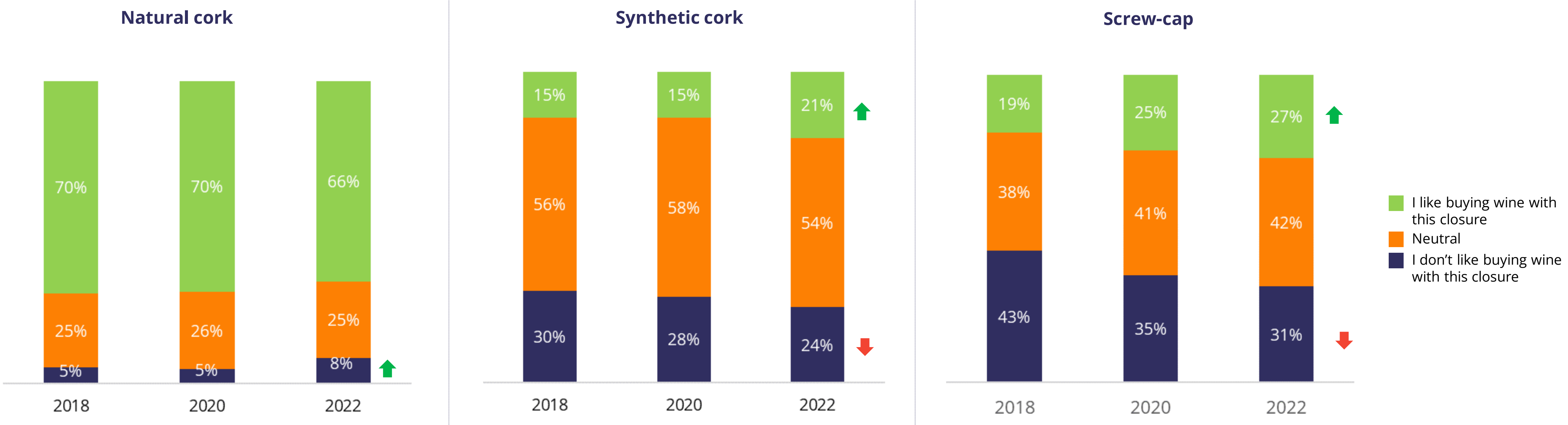
HOT TOPIC

Wine closure preferences

Natural cork remains a widely-liked closure; synthetic corks and screw-caps have become more accepted in recent years

Wine closure preferences

% who hold the following view of each wine closure type
Base = All Belgian regular wine drinkers (n≥819)



↑ / ↓: Statistically significantly higher / lower than the 2018 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

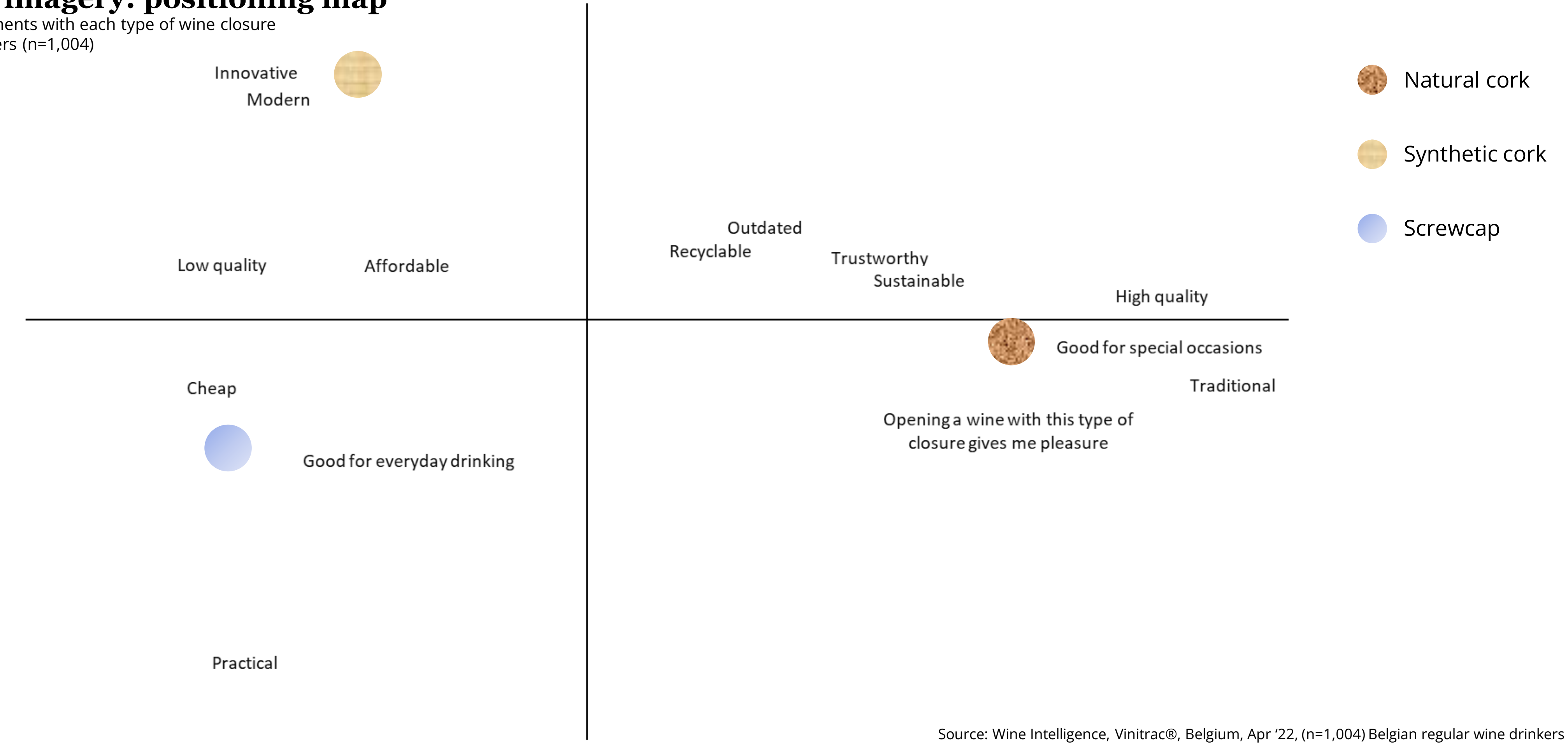
HOT TOPIC

Views on wine closure types

Natural cork is associated with quality and special occasions; synthetic cork is seen as innovative and modern; screwcaps are cheap and convenient

Wine closure types imagery: positioning map

% who associate the following statements with each type of wine closure
Base = All Belgian regular wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Hot Topic: Consumer Sentiment

Belgium Wine Landscapes

2022

Consumer sentiment

Key takeaways

1. Belgium’s regular wine drinkers are quite pessimistic

Although Belgium regular wine drinkers are confident about managing their finances, they are pessimistic about their current situation and the near future.

2. Drinker are changing their wine buying behaviour

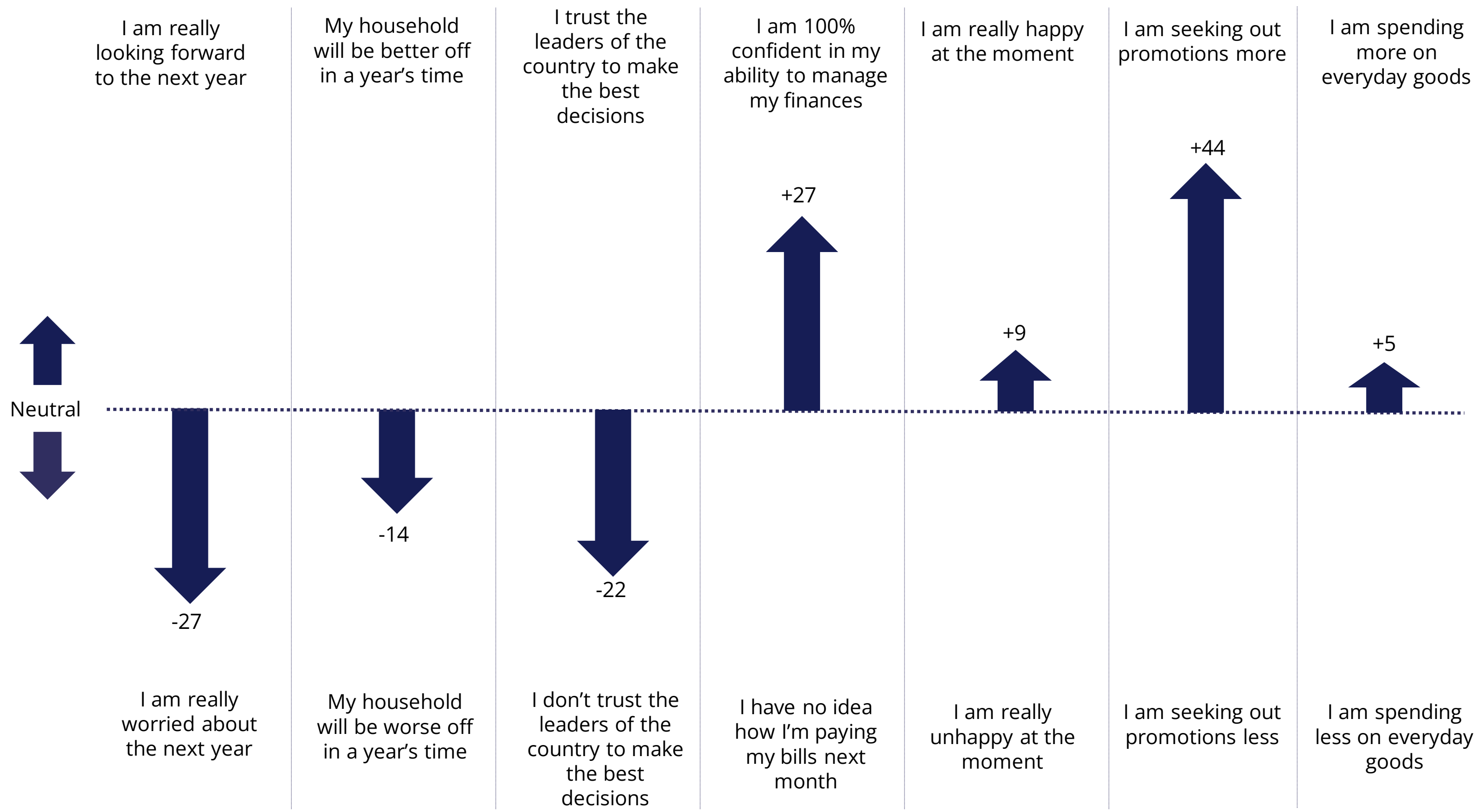
Regular wine drinkers claim to be purchasing less and cheaper wine, and going out less.

Consumer sentiment

Although Belgian regular wine drinkers feel confident about managing their finances, they are pessimistic about the next year and believe they will be worse off

Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Belgian regular wine drinkers (n=1,004)



Demographic insights

- Gen Zs and Millennials are pessimistic about their current situations when compared to all regular wine drinkers, with significantly higher numbers saying they had no idea how they would be paying for next month's bills and that they are unhappy with their current situation

Q: What do market experts say?

"Inflation is high in Belgium, around 8-9%. The rising cost of material is impacting a bottle of wine's final price. At the same time there is scarcity of the product also due to lower yields which impacted the largest wine producers but also producers in the New World.."

Importer, Belgium

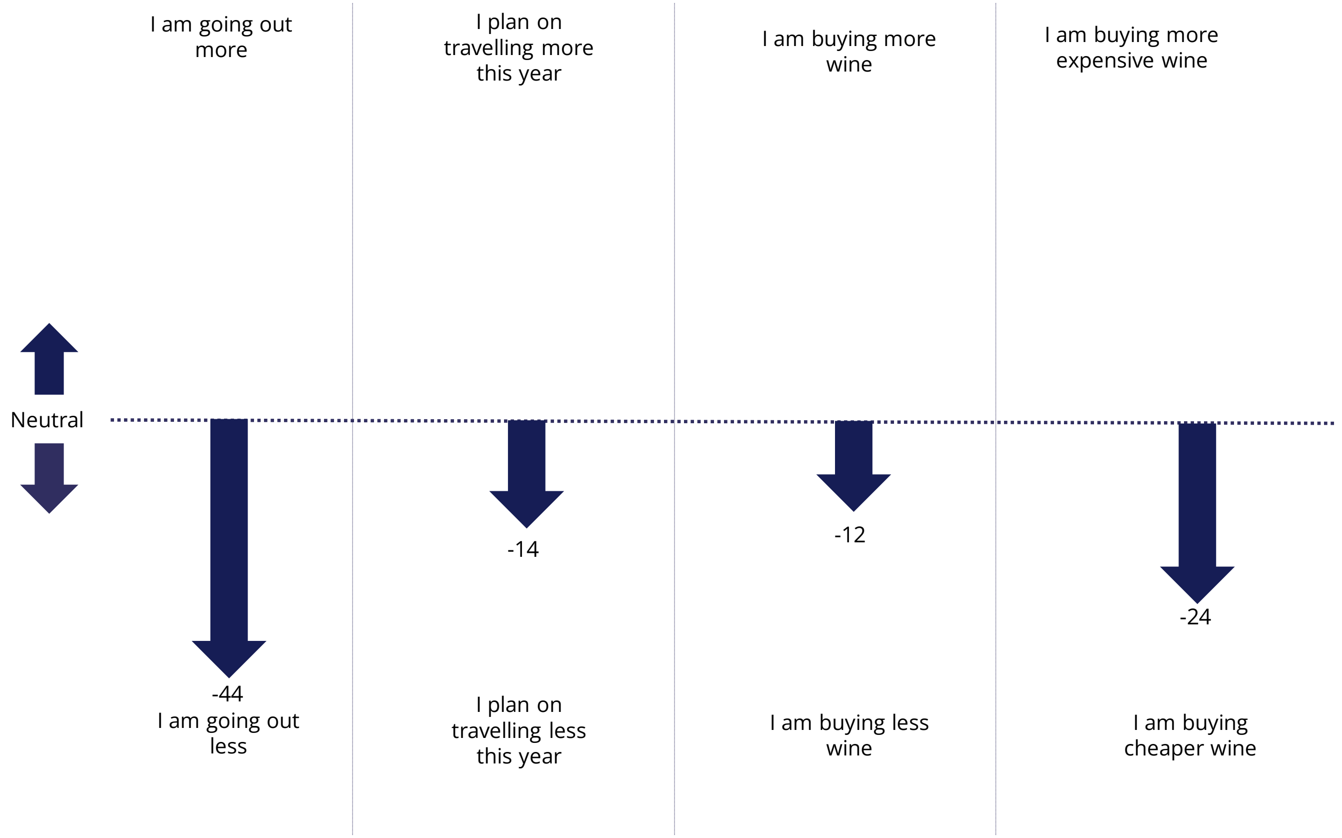
Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Consumer sentiment

Regular wine drinkers are controlling their expenditure by purchasing fewer and cheaper wines and going out less

Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Belgian regular wine drinkers (n=1,004)



Demographic insights

- Although Gen Zs and Millennials where both pessimistic about their current situation, significantly more of both groups say they are going out more, compared to all regular wine drinkers
- Greater numbers of Gen Zs also said that they where buying cheaper wine compared to all regular wine drinkers, while a significantly higher number of Millennials say that they are buying more wine

Q: What do market experts say?

"We've seen across the board in the first six months in retail about 23&, up to 30%, in diminished sales overall in market. So, I believe that consumer confidence is down now this year versus last year. I think that home consumption is down. This is essentially due to inflation and rising petrol and fuel costs."

Importer, Belgium

Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Brand Health

Belgium Wine Landscapes

2022

Brand health

Key takeaways

1. Casillero del Diablo on the up

Casillero del Diablo enters the top most powerful brands in the Belgian market, alongside Gran Baron and J. P. Chenet

2. Awareness decline for mainstream brands

Several mainstream brands experienced decreasing awareness between 2020 and 2022. Overall, brand awareness decline is less sharp than the that for source countries and regions of origin.

Global Wine Brand Power Index

Brand health measures included in the index

Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	Brand awareness index	Wine Brand Power Index
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	Brand purchase index	
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand		
Consideration	% who would consider buying each brand Base = Those who have heard of each brand		
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	Brand connection index	
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand		

Belgium Brand Power

Gran Barón holds on to its top spot in the 2022 Belgium Brand Power Index

Cava GRAN BARÓN

1st

J.P. CHENET

2nd

Casillero del Diablo

3rd

Belgian Brand Power Index 2022

Gran Barón and J. P. Chenet remain the most powerful brands in the Belgium market; Casillero del Diablo improves its position and Mouton Cadet enters the top five

Ranking '22		Final Index	Tracking vs 2021	Score difference vs 2021
1	Gran Barón	88.9	=	-3.2
2	J.P. Chenet	84.3	=	1.3
3	Casillero del Diablo	79.9	↑+2	8.3
4	Mateus	67.7	↓-1	-4.9
5	Mouton Cadet	66.5	↑+1	1.3
6	Gato Negro	63.9	↑+1	-0.8
7	Jacob's Creek	61.5	↓-3	-10.2
8	Lindeman's	60.9	↑+1	0.4
9	Roodeberg	59.6	↓-1	-4.2
10	Torres	54.8	↑+1	3.5
11	Viñas del Vero	50.4	↑+14	9.2
12=	El Coto	49.3	↓-2	-5.8
12=	Cono Sur	49.3	↑+9	5.9
14	Fantini Farnese	48.6	↑+6	4.5
15	Vieux Papes	48.5	↓-1	-0.2

Ranking '22		Final Index	Tracking vs 2021	Score difference vs 2021
16	M. Chapoutier	47.9	↑+8	6.3
17	Campo Viejo	47.6	↑+2	3.5
18=	Marqués de Cáceres	46.0	↑+8	5.9
18=	Tarapacá	46.0	↑+10	8.1
20	Baron de Lestac	45.4	↑+14	12.3
21	Georges Duboeuf	43.9	↑+2	1.3
22	Cellier des Dauphins	43.8	↓-6	-2.4
23	Gallo Family Vineyards	43.4	↓-8	-4.6
24	Listel	43.3	↑+4	3.5
25	Hardys	42.7	↓-13	-8.4
26	Antinori	40.9	↓-5	-3.0
27	Maison Castel	40.1	↑+8	8.8
28	Yellow Tail	40.0	↓-15	-9.2
29	Sunrise	37.2	↓-2	-2.6
30	Viña Maipo	36.3	↑+3	1.2

Note: Belgian brand power comes from our annual report published in February 2022

Source: Wine Intelligence, Vinitrac® Belgium, Jan '22 Belgian regular wine drinkers

Brand health: Consumption / awareness

J. P. Chenet is the most well known brand while Gran Barón shows a high conversion rate, on a par with J. P. Chenet

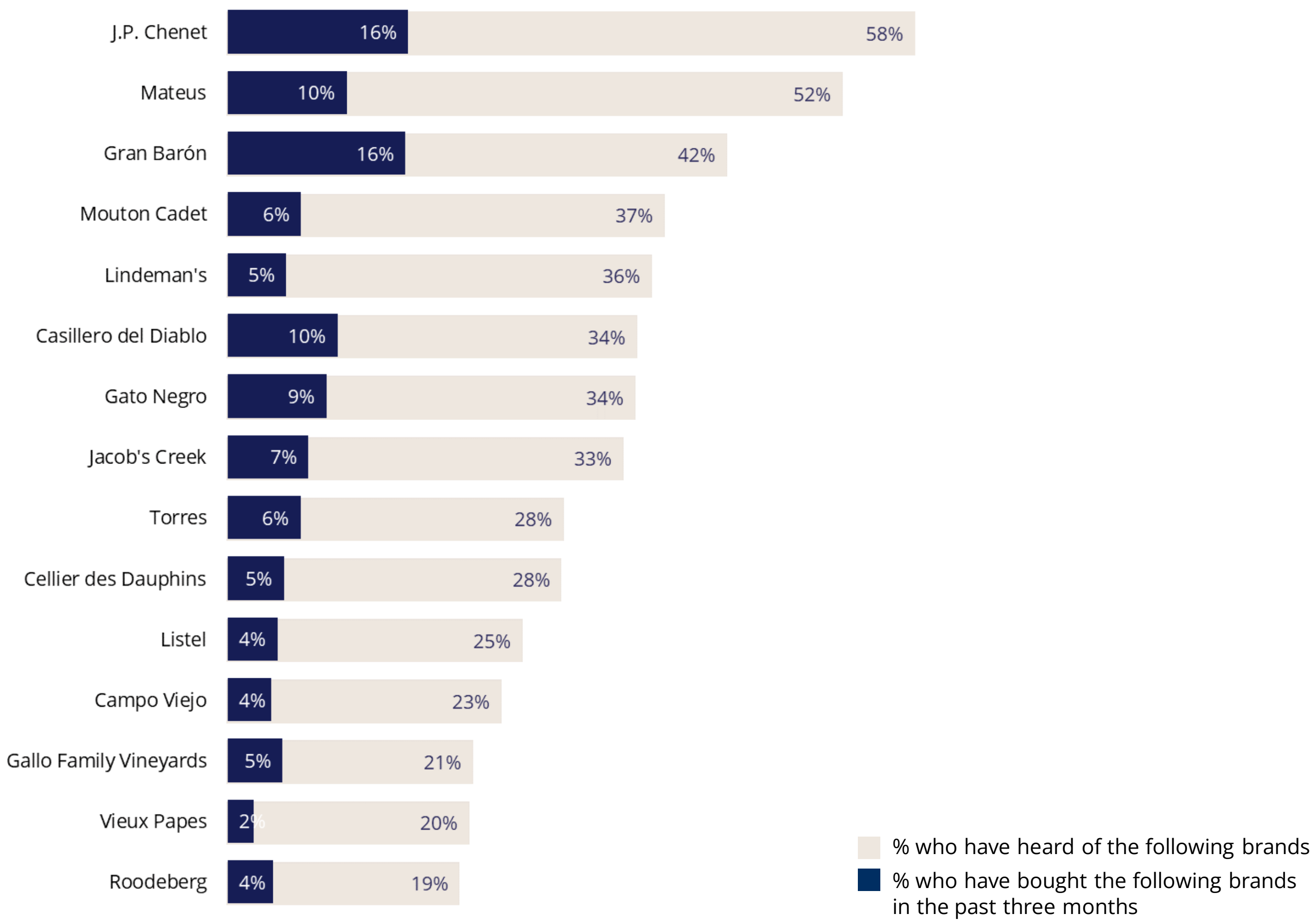
Q: What do market experts say?

"Over COVID, there was more of a fragmentation of the market than a consolidation, and no one single brand really struck out as a success story because of this. I tend to believe that this is a very mature market where it's becoming more difficult for brands."

Importer, Belgium

Brand health: Top 15 awareness and consumption levels

Base = All Belgian regular wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Brand awareness: Tracking

Several mainstream brands experienced decreasing awareness between 2020 and 2022

Awareness: Tracking

% who have heard of the following brands
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	J.P. Chenet	59%	62%	58%	→	↓
2	Mateus	51%	55%	52%	→	→
3	Gran Barón	43%	49%	42%	→	↓
4	Mouton Cadet	45%	43%	37%	↓	↓
5	Lindeman's	38%	44%	36%	→	↓
6=	Casillero del Diablo	37%	39%	34%	→	↓
6=	Gato Negro	31%	35%	34%	→	→
8	Jacob's Creek	35%	38%	33%	→	↓
9=	Torres	28%	31%	28%	→	→
9=	Cellier des Dauphins	34%	32%	28%	↓	→
11	Listel	24%	24%	25%	→	→
12	Campo Viejo	19%	24%	23%	→	→
13	Gallo Family Vineyards	19%	22%	21%	→	→
14	Vieux Papes	22%	24%	20%	→	→
15	Roodeberg	19%	22%	19%	→	→
16	Marqués de Cáceres	19%	17%	18%	→	→
17	El Coto	16%	18%	16%	→	→
18	Viñas del Vero	12%	14%	14%	→	→
19	Maison Castel	n/a	14%	12%	n/a	→
20	Georges Duboeuf	10%	8%	11%	→	→
21=	Hardys	10%	12%	10%	→	→
21=	Zonin	11%	6%	10%	→	↑
21=	Baron de Lestac	12%	9%	10%	→	→
21=	Frontera	9%	8%	10%	→	→
25	Santa Carolina	4%	11%	9%	↑	→
26=	Yellow Tail	n/a	7%	8%	n/a	→
26=	Ruffino	7%	6%	8%	→	→
26=	Antinori	7%	6%	8%	→	→
26=	Arniston Bay	8%	10%	8%	→	→
26=	Fantini Farnese	n/a	8%	8%	n/a	→

Results for all brands available in the data table

n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Brand purchase: Tracking

Overall, the picture is stable though Gran Baron and Lindeman's are down since 2020

Purchase: Tracking

% who have bought the following brands in the past three months
Base = All Belgian regular wine drinkers (n≥819)

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1=	J.P. Chenet	15%	15%	16%	→	→
1=	Gran Barón	18%	19%	16%	→	↓
3=	Mateus	9%	11%	10%	→	→
3=	Casillero Del Diablo	10%	11%	10%	→	→
5	Gato Negro	6%	9%	9%	↑	→
6	Jacob's Creek	7%	8%	7%	→	→
7=	Mouton Cadet	9%	7%	6%	→	→
7=	Torres	5%	4%	6%	→	↑
9=	Lindeman's	7%	9%	5%	→	↓
9=	Cellier des Dauphins	6%	5%	5%	→	→
9=	Gallo Family Vineyards	4%	4%	5%	→	→
12=	Listel	3%	3%	4%	→	→
12=	Viñas del Vero	3%	3%	4%	→	→
12=	Roodeberg	5%	6%	4%	→	→
12=	Campo Viejo	3%	4%	4%	→	→

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
12=	Marqués de Cáceres	5%	2%	4%	→	→
17=	El Coto	6%	3%	3%	↓	→
17=	Tarapacá	2%	2%	3%	→	→
17=	Yellow Tail	n/a	2%	3%	n/a	→
20=	Hardys	2%	3%	2%	→	→
20=	Vieux Papes	3%	2%	2%	→	→
20=	Sunrise	1%	1%	2%	→	→
20=	Zonin	1%	1%	2%	↑	→
20=	Cono Sur	1%	1%	2%	↑	↑
20=	Georges Duboeuf	2%	2%	2%	→	→
20=	Antinori	1%	1%	2%	→	↑
20=	Baron de Lestac	2%	1%	2%	→	→
20=	Ruffino	1%	1%	2%	→	↑
20=	Maison Castel	n/a	2%	2%	n/a	→
20=	Cesari	n/a	1%	2%	n/a	→

Results for all brands available in the data table

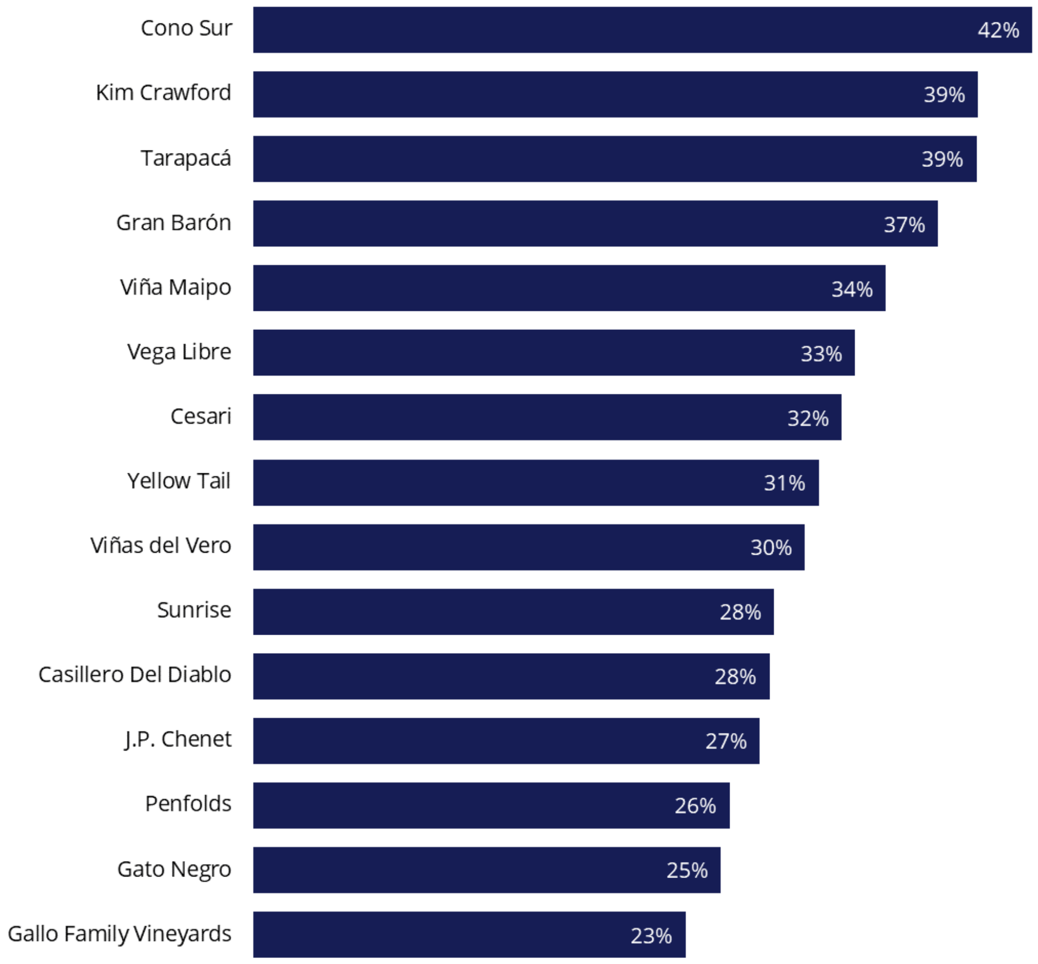
n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Brand conversion

Cono Sur, Kim Crawford, Tarapaca and Gran Barón are the leading brands in conversion rates

Conversion: Top 15

% who have bought the following brands in the past three months
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Brand conversion: Tracking

Conversion rates are broadly stable for most brands; some are showing healthy increases, especially Chilean brands

Conversion: Tracking

% who have bought the following brands in the past three months
Base = Those who have heard of each brand

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Cono Sur	32%	38%	42%	→	→
2=	Kim Crawford	25%	23%	39%	→	→
2=	Tarapacá	29%	24%	39%	→	↑
4	Gran Barón	41%	39%	37%	→	→
5	Viña Maipo	17%	13%	34%	→	↑
6	Vega Libre	n/a	16%	33%	n/a	→
7	Cesari	n/a	19%	32%	n/a	→
8	Yellow Tail	n/a	31%	31%	n/a	→
9	Viñas del Vero	24%	19%	30%	→	↑
10=	Sunrise	13%	19%	28%	↑	→
10=	Casillero Del Diablo	26%	29%	28%	→	→
12	J.P. Chenet	26%	24%	27%	→	→
13	Penfolds	14%	19%	26%	→	→
14	Gato Negro	19%	26%	25%	↑	→
15=	Gallo Family Vineyards	22%	18%	23%	→	→
15=	Antinori	21%	11%	23%	→	→
15=	Hardys	17%	22%	23%	→	→
15=	Torres	18%	14%	23%	→	↑
19	M. Chapoutier	19%	19%	22%	→	→
20=	Jacob's Creek	19%	22%	21%	→	→
20=	Brancott Estate	24%	15%	21%	→	→
20=	Roodeberg	28%	27%	21%	→	→
23=	Marqués de Cáceres	25%	14%	20%	→	→
23=	Mateus	17%	20%	20%	→	→
23=	Ruffino	13%	10%	20%	→	→
23=	Zonin	8%	19%	20%	↑	→
27=	El Coto	35%	19%	19%	↓	→
27=	Fantini Farnese	n/a	28%	19%	n/a	→
29=	Santa Digna	12%	7%	18%	→	→
29=	Listel	14%	14%	18%	→	→

Results for all brands available in the data table

Grey shading = sample size below 50
n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

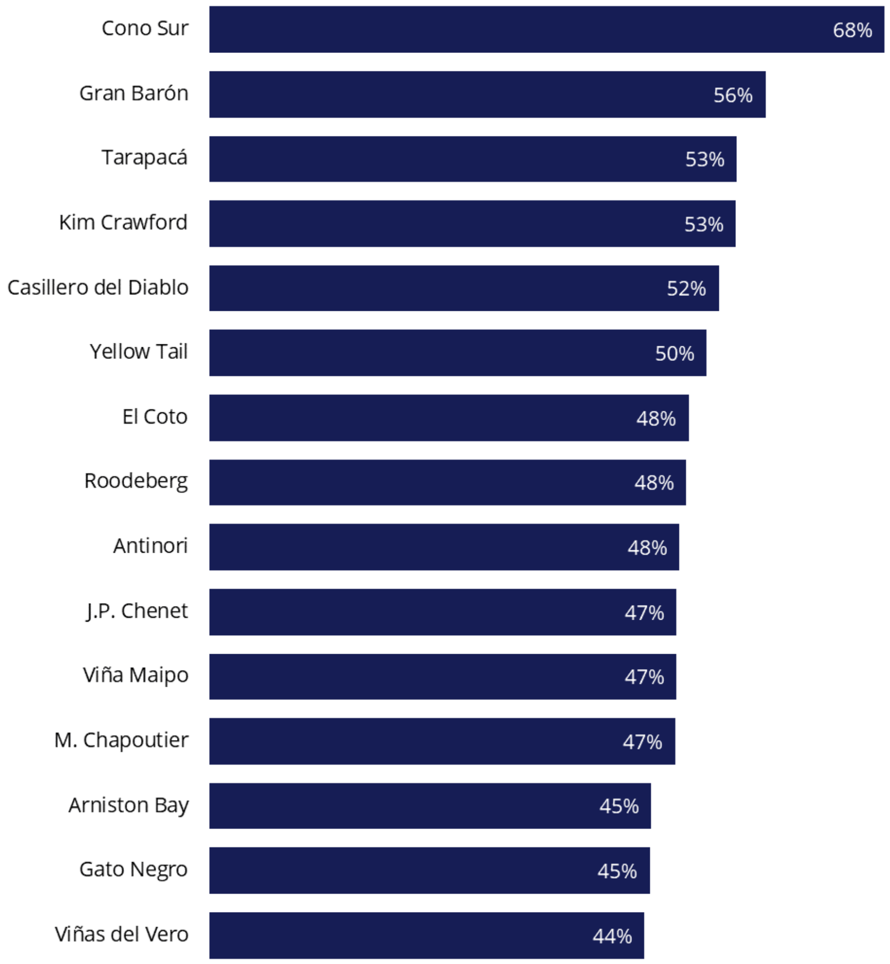
Brand consideration

Around seven in ten Belgian regular wine drinkers would consider buying Cono Sur, with the brand leading the market for this brand health metric

Consideration: Top 15

% who would consider buying the following brands

Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Brand consideration: Tracking

Conversion rates are stable overall, suggesting openness to brands has stayed the same among Belgian regular wine drinkers

Consideration: Tracking

% who would consider buying the following brands
Base = Those who have heard of each brand

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Cono Sur	64%	52%	68%	➡	➡
2	Gran Barón	56%	56%	56%	➡	➡
3=	Tarapacá	51%	40%	53%	➡	➡
3=	Kim Crawford	41%	41%	53%	➡	➡
5	Casillero del Diablo	53%	48%	52%	➡	➡
6	Yellow Tail	n/a	58%	50%	n/a	➡
7=	El Coto	52%	52%	48%	➡	➡
7=	Roodeberg	47%	55%	48%	➡	➡
7=	Antinori	60%	52%	48%	➡	➡
10=	J.P. Chenet	41%	48%	47%	⬆	➡
10=	Viña Maipo	36%	43%	47%	➡	➡
10=	M. Chapoutier	47%	46%	47%	➡	➡
13=	Arniston Bay	32%	45%	45%	➡	➡
13=	Gato Negro	43%	45%	45%	➡	➡
15=	Viñas del Vero	44%	44%	44%	➡	➡

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
15=	Marqués de Cáceres	45%	43%	44%	➡	➡
17=	Sunrise	43%	46%	43%	➡	➡
17=	Jacob's Creek	49%	53%	43%	➡	⬇
19=	Mouton Cadet	46%	41%	41%	➡	➡
19=	Mateus	36%	39%	41%	➡	➡
21=	Fantini Farnese	n/a	42%	40%	n/a	➡
21=	Torres	37%	45%	40%	➡	➡
21=	Campo Viejo	41%	37%	40%	➡	➡
24=	Georges Duboeuf	34%	44%	39%	➡	➡
24=	Listel	25%	33%	39%	⬆	➡
24=	Zonin	19%	22%	39%	⬆	⬆
27=	Gallo Family Vineyards	42%	43%	38%	➡	➡
27=	Vega Libre	n/a	31%	38%	n/a	➡
27=	Cellier des Dauphins	36%	37%	38%	➡	➡
30	Vieux Papes	40%	42%	37%	➡	➡

Results for all brands available in the data table

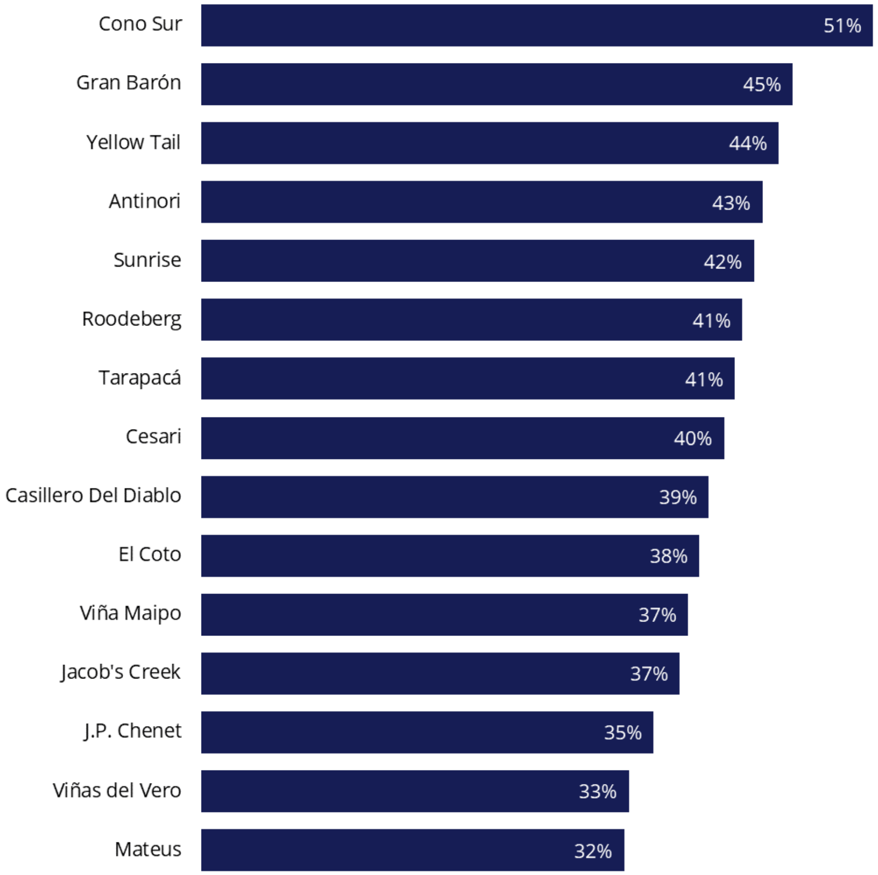
Grey shading = sample size below 50
n/a = tracking unavailable for this wave
= Represents equal ranking
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Brand affinity

As with the consideration rate, Cono Sur is highest scoring brand for affinity

Affinity: Top 15

% who think the following brands are right for people like them
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Brand affinity: Tracking

Cono Sur has overtaken Gran Barón as the top brand for affinity

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Cono Sur	37%	44%	51%	→	→
2	Gran Barón	52%	51%	45%	↓	→
3	Yellow Tail	n/a	42%	44%	n/a	→
4	Antinori	45%	39%	43%	→	→
5	Sunrise	27%	35%	42%	↑	→
6=	Roodeberg	46%	48%	41%	→	→
6=	Tarapacá	39%	32%	41%	→	→
8	Cesari	n/a	35%	40%	n/a	→
9	Casillero Del Diablo	44%	40%	39%	→	→
10	El Coto	45%	43%	38%	→	→
11=	Viña Maipo	31%	33%	37%	→	→
11=	Jacob's Creek	38%	46%	37%	→	↓
13	J.P. Chenet	32%	34%	35%	→	→
14	Viñas del Vero	32%	30%	33%	→	→
15=	Mateus	29%	34%	32%	→	→

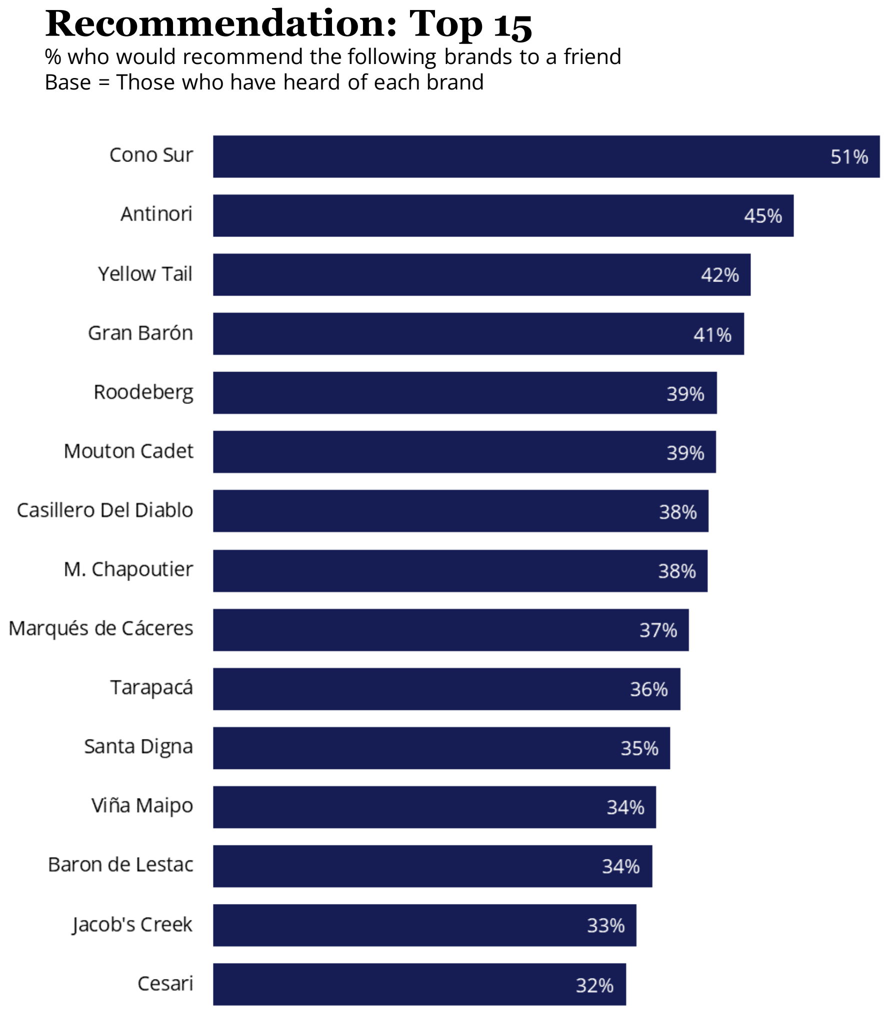
Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
15=	M. Chapoutier	38%	33%	32%	→	→
15=	Kim Crawford	24%	11%	32%	→	→
15=	Penfolds	35%	47%	32%	→	→
15=	Santa Digna	46%	23%	32%	→	→
15=	Arniston Bay	28%	42%	32%	→	→
21=	Vega Libre	n/a	25%	31%	n/a	→
21=	Marqués de Cáceres	38%	25%	31%	→	→
23=	Murviedro	n/a	36%	29%	n/a	→
23=	Mouton Cadet	37%	34%	29%	↓	→
23=	Gato Negro	30%	38%	29%	→	↓
26=	Lindeman's	23%	29%	28%	→	→
26=	Torres	32%	28%	28%	→	→
26=	Hardys	39%	48%	28%	→	↓
29=	Campo Viejo	33%	29%	27%	→	→
29=	Baron de Lestac	29%	22%	27%	→	→

Grey shading = sample size below 50
n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Results for all brands available in the data table

Brand recommendation

Around one in two Belgian regular wine drinkers would recommend Cono Sur to a friend



Source: Wine Intelligence, Vinitrac®, Belgium, Apr '22, (n=1,004) Belgian regular wine drinkers

Brand recommendation: Tracking

Stable overall, with few changes in recent years

Recommendation: Tracking

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
1	Cono Sur	37%	28%	51%	→	→
2	Antinori	57%	42%	45%	→	→
3	Yellow Tail	n/a	36%	42%	n/a	→
4	Gran Barón	48%	44%	41%	↓	→
5=	Roodeberg	41%	44%	39%	→	→
5=	Mouton Cadet	49%	40%	39%	↓	→
7=	Casillero Del Diablo	41%	37%	38%	→	→
7=	M. Chapoutier	44%	36%	38%	→	→
9	Marqués de Cáceres	40%	25%	37%	→	↑
10	Tarapacá	40%	25%	36%	→	→
11	Santa Digna	34%	33%	35%	→	→
12=	Viña Maipo	19%	26%	34%	→	→
12=	Baron de Lestac	41%	33%	34%	→	→
14	Jacob's Creek	36%	41%	33%	→	↓
15=	Cesari	n/a	32%	32%	n/a	→

Ranking '22		2018 (n=1,003)	2020 (n=819)	2022 (n=1,004)	Tracking vs. '18	Tracking vs. '20
15=	J.P. Chenet	31%	33%	32%	→	→
15=	Mateus	29%	30%	32%	→	→
18=	Vieux Papes	30%	40%	31%	→	→
18=	Hardys	25%	32%	31%	→	→
18=	Penfolds	29%	43%	31%	→	→
18=	Viñas del Vero	31%	24%	31%	→	→
22	El Coto	47%	40%	30%	↓	→
23=	Fantini Farnese	n/a	38%	29%	n/a	→
23=	Gato Negro	32%	34%	29%	→	→
23=	Kim Crawford	41%	30%	29%	→	→
26=	Georges Duboeuf	32%	42%	28%	→	→
26=	Gallo Family Vineyards	29%	28%	28%	→	→
26=	Torres	29%	28%	28%	→	→
29=	Arniston Bay	28%	30%	26%	→	→
29=	Campo Viejo	29%	22%	26%	→	→

Results for all brands available in the data table

Grey shading = sample size below 50
n/a = tracking unavailable for this wave
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Belgium, Mar '18, Jul '20, Apr '22, (n≥819) Belgian regular wine drinkers

Research Methodology

Belgium Wine Landscapes

2022

Research methodology

QUANTITATIVE

- The data was collected in Belgium since March 2017
- Data was gathered via Wine Intelligence's Vinitrac® online survey
- Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-trade or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data was collected using quotas based on age, gender* and regions
- The distribution of the sample is shown in the table:

		Mar-17	Mar-18	Mar-19	Jul-20	*Apr-22*
	n=	*1,041*	*1,003*	*1,000*	*819*	*1,004*
Gender	Male	53%	55%	52%	52%	49%
	Female	47%	45%	49%	48%	50%
	Total	***100%***	***100%***	***100%***	***100%***	***100%***
Age	18-24	8%	7%	7%	7%	6%
	25-34	14%	15%	13%	13%	16%
	35-44	16%	16%	15%	15%	16%
	45-54	18%	18%	18%	18%	19%
	55 and over	43%	44%	47%	47%	43%
	Total	***100%***	***100%***	***100%***	***100%***	***100%***
Region	Brussels	13%	11%	11%	11%	11%
	South (French) Belgium - Wallonid	35%	34%	34%	34%	35%
	North (Flemish) Belgium - Vlaanderen	52%	55%	55%	55%	54%
	Total	***100%***	***100%***	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac® Belgium, March 2017 - April 2022 (n≥1000) Belgian regular wine drinkers

Research methodology

QUALITATIVE

Market interviews were conducted with five experienced industry professionals in the Belgium wine trade in 2022.

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing.

The four interviewees were wine industry professionals working within the market in the following roles:

- Wine distributor
- Wine importer
- Wine marketer
- Market analyst
- Wine importer

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