

WHO'S WHO IN THE NETHERLANDS

Our reader's survey was compiled by Cees van Casteren from responses to a questionnaire sent to 280 key members of the Dutch wine trade. As always, the results may be subject to discussion, but they offer insight into, and a better understanding of, this unique market.

The Netherlands may be a small country geographically, but with 17m inhabitants and no domestic viticulture of any significance, it punches above its weight. At 420m litres, it is the sixth largest wine import market in the world, consuming 21.6 litres of wine per head in 2007.

Market overview

Although France still dominates the off-trade with a 40% market share, historical links have favoured the acceptance of South African wines, taking their market share from nothing in 1995 to 19% at present. Along the way, they have taken white wine market share from Germany, which now stands at 10%, and red share from France, Spain and Italy, now at 9% and 8% respectively. That is all the more remarkable because for years Spain was Holland's second largest supplier, fuelled by Sherry imports. While European wines still dominate the Dutch off-trade, all growth today comes from the New World.

Just over 50% of wines consumed are red, with 35% white and rosé at almost 14%, a remarkably high market share. Even more dumbfounding, the average price of rosé in supermarkets is higher than that of red or white. Sherry, port and vermouth, on the other hand, have all seen their market shares fall

A full 85% of all wines are sold off-trade, because 'the Dutch don't take their wives out for dinner', as a senior member of the international trade used to say. The English expression 'go Dutch' indeed has some roots here! That said, the average price paid for a bottle has increased over the last decade, from

€3.74 in 1996 to €4.10 last year - and the average price for a bottle of wine purchased in a supermarket is €2.68.

As in other European countries, the consolidation of the market means that multiple grocers have increased their market share to 65%. Albert Heijn, which also own the multiple specialist Gall & Gall, is the largest, with an estimated market share of 35%. Superunie, a buying group, is second with 23%, followed by the first discounter, Aldi at approximately 17%.

Best importer

Most Dutch supermarket chains have their own structures for wine imports, but also rely on independents for parts of their portfolio. This probably explains why most respondents eyed specialist importers rather than those servicing supermarkets in their responses. Although both DGS and Oud Reuchlin & Boelen were mentioned, most votes went to true specialists like Imperial, for their impeccable range of Austrian wines; to Colaris, for their high quality and value for money; Thiessen; Vojacek; and Wijnimport Bart, heralded as the best supplier to the Dutch on-trade. Vinites and Vinoblesse tied for fourth; Vinites because of its complete, dynamic and exciting range, and Vinoblesse because of its passion, European portfolio and organic and biodynamic wines. Kwast Wijnkopers, third, was praised for its 'distinguished portfolio both for off- and on-trade'. Residence, importer for De Gouden Ton group, was runner up. The prize however, and almost unanimously, went to Wijnkoperij Okhuysen because of its unique combi-

nation of being an established company with a modern approach, beautiful shop, and 'magnificent range from France, Spain and Italy'.

Best supermarket

Despite their focus on value wines and the fact that the biggest brand in the Dutch market, Kaapse Pracht, with annual sales of 18m bottles, is sold by Aldi, no votes went to the discounters in the Dutch market. Both Dirck III, Jumbo and C1000 gathered an equal share of the votes, praised because of their 'good price to quality' ratio and the fact that their ranges were a 'good reflection of the market place'. However, two names stood out in this class: on top was Albert Heijn, followed closely by Plus Supermarkets. Heijn was praised for its 'by far broadest range', and its consistency of quality. Nonetheless, as one respondent stated cynically, 'who else, in the land of the blind...'

Best retailer

Many respondents chose Hema for its 'value for money portfolio, consistent quality and low threshold concept'. A rather new player to the scene, Grape District, also got some votes because of the innovative and trendy way they present wines to the consumer in nine categories: bubbly, easy, mellow, and so on. Mitra and De Gouden Leeuw were tied for fourth place, Hema came in third and the two runners-up were high street specialist Henri Bloem and Gall & Gall. Henri Bloem was praised because of its complete range, its high quality wines and the fact they are price conscious. Gall was quoted many times as

BEST WINE BUYER*Hans Bootsma from Albert Heijn**"best informed amongst his peers" and
"most knowledgeable about wine".***MOST INFLUENTIAL WINE PERSON***Hubrecht Duijker**"...because of his columns in FD,
his publications in various magazines,
his website, his presence on television
and the influence via his 70
plus books over the years."*

the best large chain in the country, 'offering a relatively complete range but being on the expensive side'. The victory however, went to high street specialist De Gouden Ton, because of its complete range, and its qualified and passionate personnel.

Best buyer

Nico McGough from Residence, Bert de Boer from L'Exception Cordier and Frank Donker from LFE, Peter van Houtert from Verbunt, as well as Jean-Marc van de Kant from Jean Arnaud were named. Alexandra Poudrouyen also received praise for managing to build the successful range at Plus Supermarkets, as did Ger Bergkotte for building a great and dynamic selection for KLM Royal Dutch Airlines. Marc Collard and Tjitske Brouwer were cited as a unique team who always manage to find new gems. Jaap Kwast came fourth, with Jacqueline Snoeker from Albert Heijn third. Runner-up was Joris Snelten at DGS. The prize went to Hans Bootsma of Albert Heijn, who respondents said is 'best informed amongst his peers', and 'most knowledgeable about wine', while one respondent stated, "if you are allowed to do the purchasing already for so many years at Albert Heijn and Gall & Gall, you must be good".

Best public relations

There was little praise for either Italy or Portugal for generic promotion. Nor did Chile or Argentina receive any votes. Few were impressed with what Sopexa did for France, though many agreed that France was the most complex country to judge, because it is represented by different organisations: 'Michèle Lainé must make do with what she's got from Sopexa', was one comment. Jaap Sonne-

mans was praised for his ability to garner so much free publicity all the time. Both Paul Molleman of the Wine Institute of California and Marianne Nuberg of Viños d'España were cited, and Ghislaine Melman of Melman Communications also got votes, as did CK's Collette Claus, for always being on the news. The undisputed runners-up were Alain and Gisela Jacobs, praised for 'putting Germany back on the map in Holland in a rather difficult period'. The prize however, went to Tot PR. While many said that South Africa's success in the Dutch market had little to do with the marketing muscle or generic promotion, they called Anneke Tot 'Miss PR', being the one who invented wine public relations in the Netherlands.

Best sommelier

Sommeliers in Holland play a less important role than in France, but with so many more fine restaurants in The Netherlands than in years past, the profession has gained in stature. Many names were cited, from Ted Bunnik of La Rive, Therèse Boer of De Librije in Zwolle, Petro Kools of Da Vinci in Maasbracht to Cindy Borgers of De Lindenhof in Giethoorn. Marcel Swaghoven at Valuas in Venlo was praised, as was Holland's best sommelier for many years, Edwin Raben. Simon Veldman at Restaurant Vermeer in Amsterdam came in third, and Noël Vanwittenbergh at Ciel Bleu in Amsterdam was runner-up, only to be beaten by a quite slim margin by Peter Bruins of De Bokkedoorns in Overveen.

Best restaurant wine list

Bokkedoorns in Overveen, Cordial in Oss, Echoput in Hoogsoeren and Savarijn in Nijmegen were mentioned, as were

Valuas in Venlo, De Leest and Beluga in Maastricht. While Brasserie Van Baerle in Amsterdam placed fourth, De Lindenhof in Giethoorn came in third. Many votes went to restaurant De Linnen in Oisterwijk, but Ciel Bleu in Amsterdam came out on top.

Best journalist

With only one consumer magazine for wine, Perswijn, and just a few for the trade - Proefschrift, Slijtersvakblad, Drankendetail - it was no surprise that Ronald de Groot was mentioned many times. Both Harold Hamersma and Nicolaas Klei also received votes. While René van Heusden, Gert Crum, Christian Callec and even the author were praised, the winner was no surprise: the *eminence grise* of Dutch wine journalism: Hubrecht Duijker.

Most influential Wine Person

Many different suggestions were made, including journalists like Harold Hamersma (Trouw), Pieter Nijdam (Telegraaf), Nicolaas Klei (Elsevier) and Ronald de Groot (Perswijn) for their influence. Albert Heijn wine buyer Jacqueline Snoeker was mentioned, as was wine and food guru Peter Klosse. Holland's only Master of Wine, Frank Smulders, also got votes. But three people stood out: Jan van Lissum because of his influence via the annual trade fair in Amsterdam and his publications; Hubrecht Duijker for his television and writing, including articles, his web and 70 plus books; and Gert Zwitter, merchandiser at Albert Heijn. Zwitter is seen as the conscience of Albert Heijn and thus of wine retailing in The Netherlands. In the end, Hubrecht Duijker had one more vote than Jan van Lissum. ■