

Wine Intelligence Compass Report 2014

World wine markets & drinkers

wine
intelligence



REPORT PRICE: • GBP 500 • EUR 600 • USD 800 • AUD 850 or 1 Report Credit

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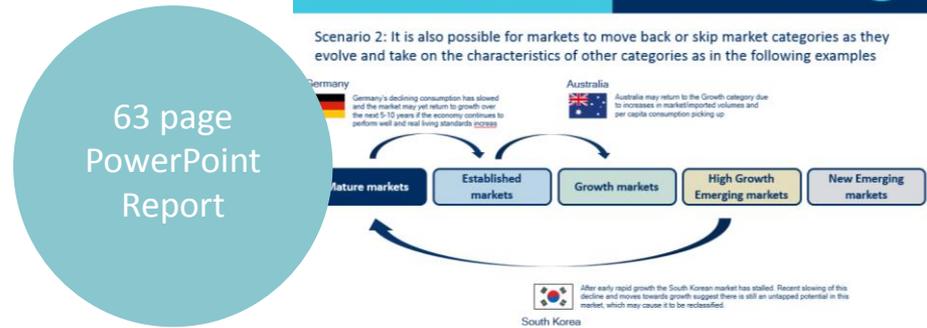
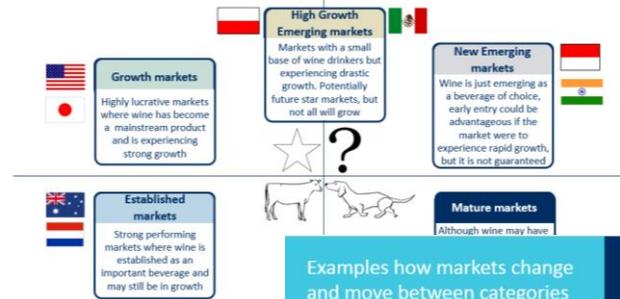
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Market profiles

Within each of our identified market categories we have profiled 2 interesting markets to explain the market behaviour and consumers



63 page
 PowerPoint
 Report

Excerpts from the introduction



“The International wine market is a diverse, complex and fragmented place. As with any product, selling into multiple international markets provides a wide range of challenges and barriers from language and cultural differences through to regulatory systems, protectionism and even corruption”.

“The pace of change in markets appears to be increasing, not decreasing, and keeping abreast of developments and being positioned to capitalise on new opportunities is key to remaining successful”.

“The Wine Intelligence Compass Report 2014 is the first attempt to lay out a cohesive global picture and in doing so allow business leaders to compare and contrast the opportunities in 50 of the world’s most important wine markets”.

“China and Russia are now in the top 10 largest wine markets in terms of volume with China currently sitting 5th. Impressive economic performance outside of the BRIC such as in Mexico, Southeast Asia and Western Africa have seen the emergence of new wine market opportunities as the newly-formed middle classes seek to quench their thirst for aspirational, lifestyle products including wine”.

“The size, growth and behaviour of the wine drinking population within each of the markets are key factors in determining levels of potential and success, and this report presents a model that tries to capture these different elements in a compound measure of market attractiveness”.

Graham Holter
Associate Director, publishing
Wine Intelligence



- Wine Intelligence global markets classification is based on a combination of
 - **Quantitative data measuring market attractiveness** and
 - Wine intelligence **qualitative judgements** based on industry knowledge and experience
- Firstly we collected data on 20 variables combining **economic and wine market measures** to assess market attractiveness
- For each measure countries were given a score from 1-10 (distributed by orders of 10 percentiles) to aid direct comparison between measures
- Each measure was assigned a weighting based on its importance
- To test the reliability of the model a factor analysis was run on the measures using a **Cronbach's Alpha test** resulting in a score of 0.78 suggesting an acceptable level of association
- This combined factor was used to **classify the markets into groups** (along with detailed market information) and rank the potential of the markets within each classification group

- Quantitative data for market attractiveness was collected on 20 measures to classify the wine markets.
- The data originated from 2 main groups:
 - **Economic measures:** Used to assess the stability and future potential of the market as a whole
 - **Wine market measures:** Used to identify the current and future potential for wine in the market
- Data was collected from both secondary and primary Wine Intelligence sources. Wherever possible a single source was used for each measure with a second source only utilised in the absence of data.

- The following economic measures were used; sources noted in the parentheses:
 - Adult population size (World Bank / CIA Factbook)
 - GDP per capita (World Bank / CIA Factbook)
 - GDP per capita trend 5yrs (World Bank / CIA Factbook)
 - GDP prediction 5 yrs (World Bank / CIA Factbook)
 - National Income (World Bank)
 - Purchasing power parity (World Bank)
 - Corruption (Transparency International)
 - Unemployment (World Bank / CIA Factbook)
 - Starbucks – measure of globalisation (The Economist / Starbucks)

- The following wine market measures were used; sources noted in the parentheses:
 - Market volume (IWSR)
 - Market trend (IWSR)
 - Imported wine volume (IWSR)
 - Imported wine trend (IWSR)
 - Per capita consumption (IWSR)
 - Per capita trend (IWSR)
 - Wine drinkers population (Wine Intelligence calibration studies)
 - Growth potential (Wine Intelligence calibration studies)
 - Market value (Australian Statistical Compendium 2009/ TDA / FAOSTAT)
 - Average price (Australian Statistical Compendium 2009/ TDA / FAOSTAT)
 - Market accessibility (Qualitative judgements based on market

- Additional Wine Intelligence data and the knowledge accumulated over the years was used to support the classification of the markets into groups
 - Calibrations studies determining the percentage of total and regular wine drinkers within each market
 - Wine Intelligence Vinitrac® studies: Quantitative studies now running in over 25 countries across the globe enabling us to have collected the views of more than 80,000 respondents about wine over the past year
 - Focus groups, accompanied shopping and consumer interviews in various markets which bring an in-depth understanding of wine consumer attitudes and behaviours
 - Trade interviews offering insights directly from individual markets about the current status and future opportunities of the wine industry
 - Secondary sources



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