



## The International Wine Industry: Global Experts' Vision 2034

Over 90 participants attended our discussion panel at ProWein about the central changes in the wine industry over the next years. The international panel of experts included: Carina Gous (Business Director Wine, Distell), Massimo Tuzzi (Chief International Officer, Casa Vinicola Zonin), Brenton Fry (Managing Director, Negociants); Sara Norell (Head of Purchasing, Systembolaget); Stephan Linden (Managing Director, Wine in Black).

From the perspective of the panel members, the wine industry will need to shift towards the needs of consumers. The product offering is to be aligned more closely to the demands of consumers. Communication-wise, this means the end of the "top-down education of the consumer" and a focus on consumer loyalty. One panel member brought it to the simple formula: "Distribution is important but consumer access will be even more important for future success."

The panel discussed selected trends that were identified through the survey of Wine Intelligence commissioned by ProWein.

The following are the highlights of the discussion are summarized below:

### **Trend: In 2034 consumers, not producers, will dominate the wine industry**

All panel participants expect the growing importance of consumers and put in their marketing efforts on a deep understanding of the needs of end users.

Massimo Tuzzi observed an increasingly dynamic change of consumer behaviour and concludes "Tomorrow will not be like today."

Stephan Linden emphasised increasing desire of consumers to control the purchasing process.

Sara Norell stressed the increasing importance of "convenience" and assisting consumers in the purchase process from the perspective of trade.

### **Trend: The distribution is further polarised, supermarkets are even more dominant**

This second hypothesis was generally accepted by the panel members, although also the opening up of opportunities in polarising markets.

Brenton Fry described in detail polarising developments in the UK market and stressed the critical importance of retail groups.

Massimo Tuzzi sees increasing growth potential in "Mass-niche segments" such as Prosecco.

### **Trend: North America and China are the main investment targets**

The panel confirmed the expected dominance of North America and China is limited. Panellists stressed the importance of a balanced country portfolio for sustainable growth and see opportunities in new and emerging as well as old, mature markets.

Carina Gous stressed the importance of Europe for South Africa and highlighted the opportunities in African countries such as Nigeria, Angola and Ghana.

Brenton Fry pointed out that China is indeed of great importance, however, his company is currently selling more wine to Vietnam than to China.

### **Trend: The packaging will play a greater role**

The role of packaging has been viewed by the panel in different ways.

Part of the panel was of the view that in the past - apart from new closures and bag-in-box – they had not observed any packaging innovations in the wine category.

Other panel members emphasised the increasing importance of sustainable and "single-serve" packaging for the future.

[Here](#) will find to see a summary report of the study results created by Messe Düsseldorf. We are happy to offer an in-depth discussion of the results and implications for your business.

Please find [here](#) links to download our presentations and videos on our [YouTube channel](#).

With best wishes,

Richard Halstead  
Chief Operating Officer  
Wine Intelligence

### **About Wine Intelligence Ltd:**

Wine Intelligence is the leading research-led strategy consultancy serving the global wine industry. It conducts client-specific research projects to aid companies to gain greater insights into wine markets and wine consumers, and helps business leaders develop business strategy and marketing plans. The company also assists businesses in developing new brands, and in formulating and communicating marketing messages within the industry.

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