

Creating value for wine businesses through strategic advice, branding and research

[info@wineintelligence.com](mailto:info@wineintelligence.com)  
+44 (0)20 7378 1277



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## Wine Intelligence at ProWein 2012



International Trade Fair  
Wines and Spirits

Düsseldorf  
04. - 06.03.2012

[Register to attend our Seminar Programme on March 6th](#)

## Wine Intelligence in 2012

### Wine Intelligence grows eastward – and plans its ProWein debut

The start of 2012 marks an important development for Wine Intelligence, with the announcement of our merger with Wine-Networks, the German-based wine industry consultancy business owned by Wilhelm Lerner. This gives us a strong platform to grow our expertise in the German market and also in Eastern Europe, and we're privileged that Wilhelm is staying with us as an Associate Director and country manager for Germany.

Download a copy of the press release on Wilhelm Lerner's new role [here](#)

Following the merger, Wine Intelligence will be attending ProWein 2012 for the first time, and will be hosting a seminar programme at ProWein on Tuesday 6th March.



Please click [here](#) to register for our ProWein seminars and request an invitation to the post-seminar reception, the first of a series of events marking Wine Intelligence's 10th Birthday.

If you are going to ProWein and would like to meet us, come over for a chat in Hall 7a, stand D02 or [contact us](#) directly for meeting. Speak to us in your language - our team at the stand speak German, Spanish, French and Swedish.

Looking forward to an interesting 2012,

*[Richard Halstead](#)*



Vinitrac® Global survey launches soon

Deadline for questions: March 1<sup>st</sup> 2012



[Talking to wine consumers in 21 markets starts here](#)

Early bird 15% discount for orders before February 8<sup>th</sup>

## Current reports in the Reports Shop



[USA Sparkling Report](#)

[UK Sparkling Report](#)

[Closure Trends](#)

[UK Portraits](#)

[UK Landscapes](#)

[German Internet & Social Media Report](#)

[Japan Landscapes](#)

## The US and Spanish Drinks Industry in 2012 More Predictions for 2012

What will 2012 bring? The air is thick with predictions, some of which may actually come true. In this spirit (and true to our researcher DNA) we have polled our market experts, country managers and associates to find out what they think might happen, or continue to happen, over the next 12 months. You may notice the absence of China from this list – and there's a good reason for this. There's so much to say about China that we've devoted a Market Watch to it which we sent out last week, download your copy [here](#).

This month's spotlight is on the US and Spain:

### US

- Sparkling wine will be the big growth story – both domestic and imported. Prosecco and Cava will continue to make ground, particularly in on-premise, while domestic sparklers (including lightly sparkling Moscatos) will also see growth, particularly in off-premise
- Moscato will again see a strong year, mainly attracting consumers who don't normally drink wine to the category, and growing the monthly wine drinking base to over 80 million American adults
- The \$50 Cabernet will be back. Not its boom time cousin the \$100 Cabernet, which remains locked up in the cellar for the moment. The return of economic good times to white collar America will tempt some of the former big spenders to reach for their wallets again and start buying (modest) award-winning wines

### Spain

- Market consolidation continues in the wine sector in addition to the growing need to export
- There will be a need to broaden the range of target markets and wineries will increasingly look at emerging markets such as Brazil or Mexico
- Increased awareness of wine styles that can be consumed outside food occasions

*Keep an eye out for next month's 2012 predictions for emerging markets and global trends*

## Upcoming Publications in 2012:

Direct-to-home retail trends in the USA

China Trade Report

China Portraits



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## Emerging Markets

### Opportunities for sparkling wine in emerging markets

The arrival of a new year in China is a time for celebration, but will the popping of Champagne corks ever be associated with the partying that accompanies Chinese New Year?

Here at Wine Intelligence we think that sparkling wine will one day have a strong presence in China. The key ingredients are already in place: the Chinese love of celebration, particularly in the company of family and friends; their love of prestige and sophistication, particularly if it comes from France and Italy; and the increasing presence of high earning female professionals in their 20s and 30s in a rapidly urbanising population.

However timing is everything in emerging markets. Our feeling is that while the demand may exist, the Chinese market as a whole has not developed to the point where the true potential of sparkling wine can be realised – which can also be said of other styles of wine that aren't red, French or from Bordeaux.

In our most recent white paper “Opportunities for sparkling wine in emerging markets”, we examine the category drivers that will impact emerging markets over the next decade. If you are looking to expand into emerging markets there are three areas you need to bear in mind:

1. Stereotype the emerging markets at your peril. Each one has its own characteristics and peculiarities, and some very different approaches are required.
2. Consumers in emerging markets are rapidly evolving. A focus on what we would call Asian Drinker 2.0 is essential for long-term success.
3. Online and social media have leap-frogged traditional marketing approaches and are now the main drivers of communication

For more details please [download](#) your copy of the white paper or get in touch with us directly. We are also attending the [Champagne Summit](#) in February; we look forward to seeing you there.

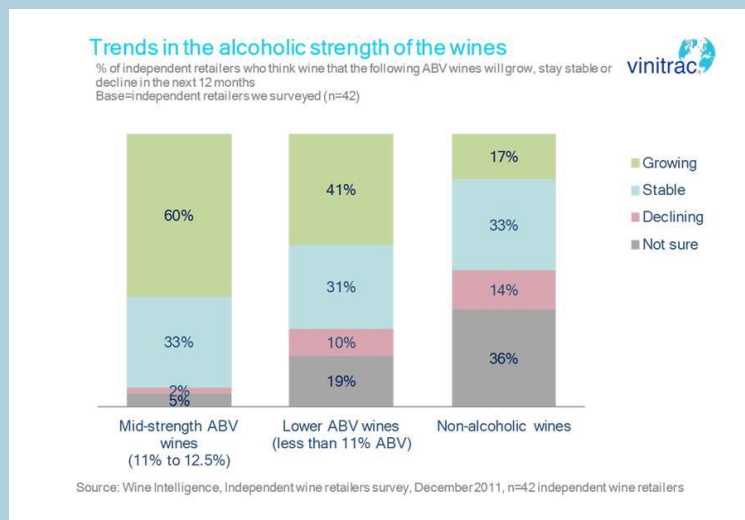


## UK Independent Retailer Report

### The growing importance of independent wine retailers

Supermarkets dominate the UK wine retailing environment, however the recent economic downturn has proved to be a point of growth for one wine retailing segment. Specialist independent retailers have certainly made an impact on consumers' wine purchasing behaviour, with 18% of regular wine consumers now visiting this retail channel. Occupying a small niche, what trends have developed in the UK's wine environment to lead to the growth of specialist retailers? Wine Intelligence has built the report around 2 main sections: the trends in the products (what do consumers look for?) and the relations with the suppliers (how can one supply an independent retailer better?).

#### One trend: Mid-strength ABV wines (11-12.5%)



#### Supplying the independents

The research shows that most independents refuse to work with suppliers who also supply major retailers or multiples — as they get better conditions than independents. A well-built website to place orders, efficient deliveries and extras such as high-resolution pictures to put on a website are all making the busy independents' lives that bit easier.

#### Further reading: [UK Independent Retailer Report](#)

\*Source: Wine Intelligence, Independent wine retailers survey, December 2011, n=42 independent wine retailers

## ■ Français

- Ce début d'année 2012 marque une étape importante pour Wine Intelligence. Vous aurez peut-être lu que sur le marché allemand nous fusionnons nos activités avec celles de Wine-Networks, l'institut de conseil spécialisé dans la filière vitivinicole dirigée par Wilhem Lerner. Cette opération nous donne une assise solide pour développer notre expertise sur le marché allemand ainsi qu'en Europe de l'Est. Nous sommes donc particulièrement heureux de pouvoir compter sur Wilhem comme Directeur Associé et Manager Allemagne.

Wine Intelligence présentera aussi pour la première fois cette année 3 séminaires au salon Prowein (inscrivez-vous [ici](#)). Vous pourrez nous y rencontrer sur le stand D02, Hall 7a ou bien nous [contacter directement](#) pour fixer un rendez-vous.

- Ce mois-ci nous abordons les marchés américains et espagnols et tentons de faire certains pronostics pour l'année à venir :

### Etats-Unis:

- Les effervescents continueront à progresser, en particulier le Prosecco et le Cava, que ce soit pour la consommation au domicile ou en CHR. De leur côté, les effervescents domestiques continueront aussi à croître, surtout pour la consommation au domicile.
- Les ventes de Moscato progresseront aussi en parvenant à attirer de nouveaux consommateurs qui ne boivent habituellement pas de vin et qui viendront ainsi grossir les rangs des 80 millions de consommateurs de vin aux Etats-Unis.
- La catégorie des Cabernets à \$50 est de retour mais ceux à \$100 tendront à rester dans la cave pour encore un moment. Un environnement économique plus favorable aux cols blancs devrait les inciter à dépenser un peu plus.

### Espagne:

- La consolidation des entreprises devrait se poursuivre, les plus petits étant contraints de fermer ou d'être absorbés par les plus grands
- Les marchés d'exportation continuent à dominer les esprits, avec en tête le Mexique et le Brésil

- Le vin n'est plus considéré comme accompagnant uniquement les repas mais peut aussi se boire en dehors de ces occasions
- Nous pensons que les vins effervescents devraient finir par trouver leur place sur le marché chinois. Les facteurs-clés de leur développement sont déjà en place: les chinois aiment la fête et les célébrations, en particulier dans le contexte familial. Ils sont aussi attirés par le prestige et les produits raffinés, en particulier s'ils sont français ou italiens. Enfin, l'émergence d'une classe moyenne jeune, généralement âgée de 20 à 30 ans, au sein d'une population urbaine grandissante conforte cette prévision.
- Quoique les enseignes de grande distribution continuent à dominer le marché britannique, les déboires économiques récents n'ont manifestement pas nui aux cavistes. Près d'un consommateur de vin sur 5 (18%) y achète du vin au moins une fois de temps en temps. Occupant une place que certains qualifieraient de "niche", qu'est ce qui peut favoriser le développement de ce circuit? Les réponses se trouvent dans le rapport « cavistes » que nous publions aujourd'hui: les tendances produits (qu'est ce que leurs consommateurs recherchent?) et les relations avec les fournisseurs (comment les opérateurs peuvent-ils mieux servir les cavistes?)

## Español

- 2012 comienza fuerte con la fusión entre Wine Intelligence y Wine-Networks, la consultora especializada en el mercado de vino alemán y propiedad de Wilhelm Lerner. Esta unión nos permitirá profundizar nuestro conocimiento de los mercados de Alemania/Europa del este, además de contar con Wilhelm como Director Asociado.

Wine Intelligence estará presente en ProWein organizando una jornada de seminarios. Puede registrarse a nuestros seminarios [aquí](#). Durante la feria nos encontrará en el Hall 7a – Stand D02 o si lo prefiere puede [contactar con nosotros](#) para hablar

- Predicciones sobre los mercados de EEUU y España:

### EEUU

- El vino espumoso continuará su gran crecimiento, tanto los espumosos nacionales como los importados. Prosecco y Cava continuarán creciendo, particularmente en el canal horeca, mientras que los espumosos nacionales tendrán mayor crecimiento en el canal alimentación.

- Moscato tendrá de nuevo un gran año, atrayendo principalmente a los consumidores menos implicados en la categoría de vinos y aumentando la base de consumidores regulares de vino hasta 80 millones de americanos.

- Los Cabernet Sauvignon de 50\$ están de regreso aunque no los de 100\$ quien de momento permanecerá sin salir de las bodegas. El mejor clima económico experimentado por los americanos de clase media tentará de nuevo sus bolsillos.

#### ESPAÑA

- Continúa la consolidación del sector y la necesidad de exportar de las bodegas.

- La necesidad de encontrar nuevos mercados hará que las bodegas cada día se interesen más en mercados emergentes como Brasil o Méjico.

- Aumento de la notoriedad de vinos con estilos compatibles con ocasiones de consumo sin comida

- En Wine Intelligence creemos que la categoría de vinos espumosos tendrá algún día una fuerte presencia en China. Las bases están sentadas: es una cultura a la que le encantan las celebraciones en compañía de familiares y amigos; aman el prestigio y la sofisticación, particularmente si viene de Francia o Italia; y se está produciendo un aumento de mujeres profesionales en núcleos urbanos entre 20 y 30 años.
- Los supermercados dominan la venta de vino en el Reino Unido, sin embargo las ventas en tiendas especializadas han crecido pese a la reciente recesión económica. Actualmente hasta un 18% de los consumidores regulares de vino han comprado vino en este tipo de establecimientos. Ocupando un nicho de mercado diferenciado nos preguntamos ¿qué tendencias explican este crecimiento? Para contestar esta pregunta Wine Intelligence ha desarrollado un informe dividido en dos secciones: 1) por un lado las tendencias en el producto ¿qué están buscando los consumidores?, y por otro, 2) las tendencias en las relaciones comerciales ¿qué se puede hacer para mejorar las relaciones comerciales entre los productores/bodegas y los comerciantes minoristas?