THE CHINESE WINE MARKET
LANDSCAPE REPORT
JUNE 2017

China Landscapes 2017

The China Landscapes 2017 report includes:

- 107-page PowerPoint report with the latest information regarding the Chinese wine market, supported by:
    - Wine Intelligence Vinitrac®
    - Wine Intelligence market experience
    - Secondary sources
    - Trade interviews

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Report price:

GBP 2,500
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AUD 4,500
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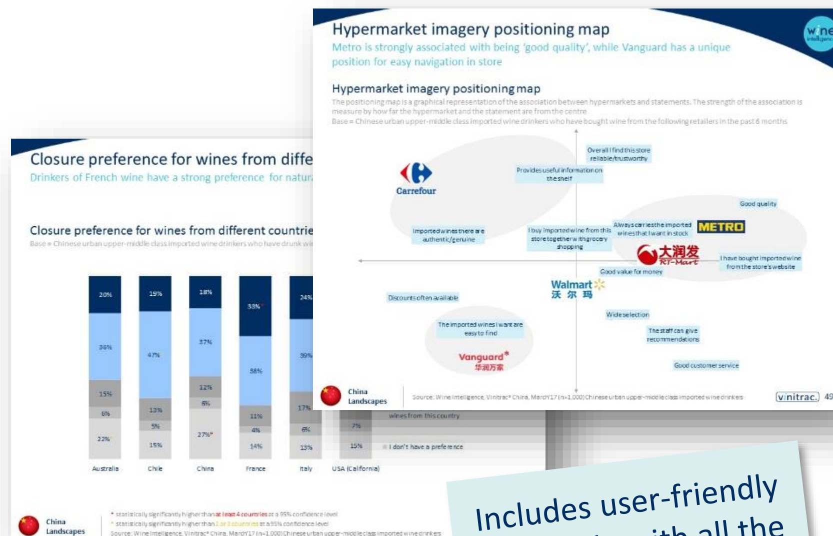

Includes user-friendly data table with all the measures from Vinitrac® showing significances

*All prices exclusive of VAT, GST, or relevant local sale taxes at the current rate

Contents

Key trends in the Chinese market

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1. EXPANDING MARKET

- Growing disposable income, coupled with improving distribution logistics for wine, has enabled increased access to wine in lower tier cities, supporting growth in imported wine

2. ACCELERATION OF PERSONAL CONSUMPTION OF WINE

- Continuing shift away from wine purchased for the benefit of others, to wine purchased for personal, everyday consumption

3. YOUNGER AND DIVERSIFYING WINE DRINKER POPULATION

- Diversifying base of wine consumers, becoming younger, more experimental and open-minded

4. WINE FLAVOUR BECOMING KEY DRIVER IN WINE CHOICE

- The flavour of wine is growing in importance as a key driver of wine choice, with consumers looking for wines that are suited to the Chinese palate

5. STRONG GROWTH IN FRUIT-DRIVEN, LOWER TANNIN STYLED RED WINES

- Ongoing growth in the red wine market, with consumers more typically favouring fruit-styled, softer wines with lower tannin and acidity

6. STRONG POTENTIAL FOR AROMATIC WHITE WINES

- Developing demand for wine white, with strong preference within the white wine category for aromatic styles amongst Chinese wine drinkers

Key trends in the Chinese market

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7. GROWTH POTENTIAL FOR SPARKLING WINES

- Strong growth potential for sparkling wine in China, primarily driven by sweeter styles

8. WINE PREFERENCES VARY BY REGION WITHIN CHINA

- EAST preference for earthy, rich reds; WEST turning to elegant, soft styles; NORTH look for bold, drier reds and SOUTH preference for smoother red styles

9. CONTINUED SHIFT TO ONLINE PURCHASING

- Ongoing shift to online purchasing, driven by ease of access to wine information and recommendation and supported by lower prices

10. NORMALISATION OF RETAIL PRICES

- Normalisation of retail price, driven by increasing consumer knowledge & ability of online retailers to offer lower prices and price transparency

11. BROADER AVAILABILITY OF WINE, INCREASINGLY AT LOWER PRICES IN THE ON-TRADE

- Increase in number of wines available and listed in restaurants and bars, coupled with a reduction in on-trade pricing

12. INCREASING ACCEPTANCE OF SCREWCAP CLOSURES

- Increasing acceptance of screwcap for wines at lower price points, although more resistance towards screwcaps for red wine, particularly for gifting occasions

Research Methodology

Vinitrac® China

- Vinitrac® data for this study were collected in March 2015 (n=1,119) and in March 2017 (n=1,000)
- Data were gathered via Wine Intelligence's Vinitrac® online survey
- The respondents in both waves meet the following requirements:
  - Urban upper-middle class: personal monthly income before tax at least 6,000 RMB in Beijing, Guangzhou, Shanghai, Hangzhou and Shenzhen; or 5,000 RMB in Wuhan, Chengdu, Shenyang, Chongqing, Changsha, Zhengzhou and Guiyang
  - 18-54 years old
  - Residents of Beijing, Guangzhou, Shanghai, Wuhan, Chengdu, Shenyang, Hangzhou, Shenzhen, Chongqing, Changsha, Zhengzhou and Guiyang
  - Drink imported grape-based wine at least twice a year
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of Chinese urban upper-middle class imported wine drinkers in terms of age, gender and geography

Source: Wine Intelligence, Vinitrac® China, March'15 (n=1,119), March'17 (n=1,000) Chinese urban upper-middle class imported wine drinkers

REPORT PRICE: • AUD 4,500 • GBP 2,500 • USD 3,250 • EUR 3,000 • 5 Report Credits

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