
Global Wine SOLA Report:

Sustainable, organic & lower alcohol
wine opportunities 2018

May **2018** Multimarket Report
Press extract



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1. Organic wine represents the strongest opportunity within the SOLA universe

- Organic wine ranks first in the SOLA wine opportunity index amongst consumers across 11 markets
- Organic is best understood and recognised alternative wine type by both trade and consumers based on external accreditation and strong awareness of organic in adjacent food and drink categories e.g. coffee & chocolate
- Broad understanding of organic principles occurs despite over 300 certifying bodies for organic wine and different regulations within markets and underlying consumer view that wine is 'natural' and therefore 'organic'
- Some trade still questioning fundamental organic wine quality and the willingness for consumers to pay a premium for organic wine
- Organic wine opportunity particularly strong in Finland, Sweden and Germany, driven by strong retail objectives to increase market share of organic wines

Key findings

Wines classifying themselves as 'sustainably-produced' or 'environmentally-friendly' score strongly in the SOLA index

2. Strong and positive opportunity for sustainably-produced wines, despite complexity of sustainability certification and lack of single definition

- Consumers report positive intent to purchase sustainably-produced wine in the future, although current awareness levels remain low
- Despite the complexity of sustainability certifications globally, consumers are drawn to wine that is produced 'sustainably' whether or not this comes with an endorsed accreditation, although endorsed accreditation does build positive equity
- Strong support amongst consumers for sustainably-produced wine across a range of markets and beyond Finland, particularly in Germany, Portugal and the US

3. Strong opportunity for wine positioned as environmentally-friendly which may not carry accredited endorsement, but must be credible

- Strongest support for environmentally-friendly wine in Finland and opportunity also in the English-speaking markets of the USA, Ireland and the UK

SOLA opportunity index

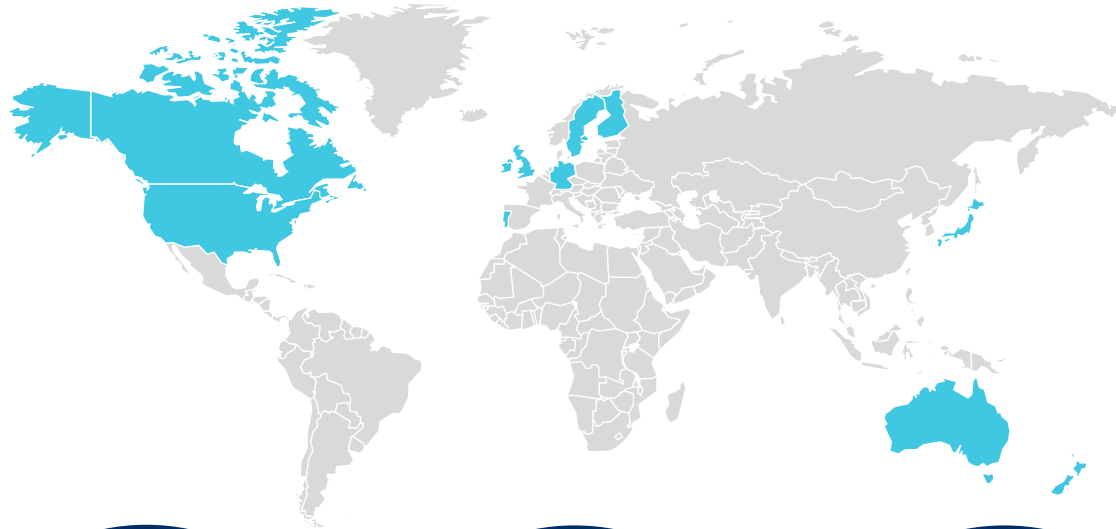


Global SOLA wine opportunity index 2018:

Sustainable, organic & lower alcohol wine opportunity index

Testing the opportunity for alternative wine types and styles across 11 wine markets

Australia
Canada
Finland
Germany
Ireland
Japan



New Zealand
Portugal
Sweden
UK
USA

Representative of
220 million
wine drinkers

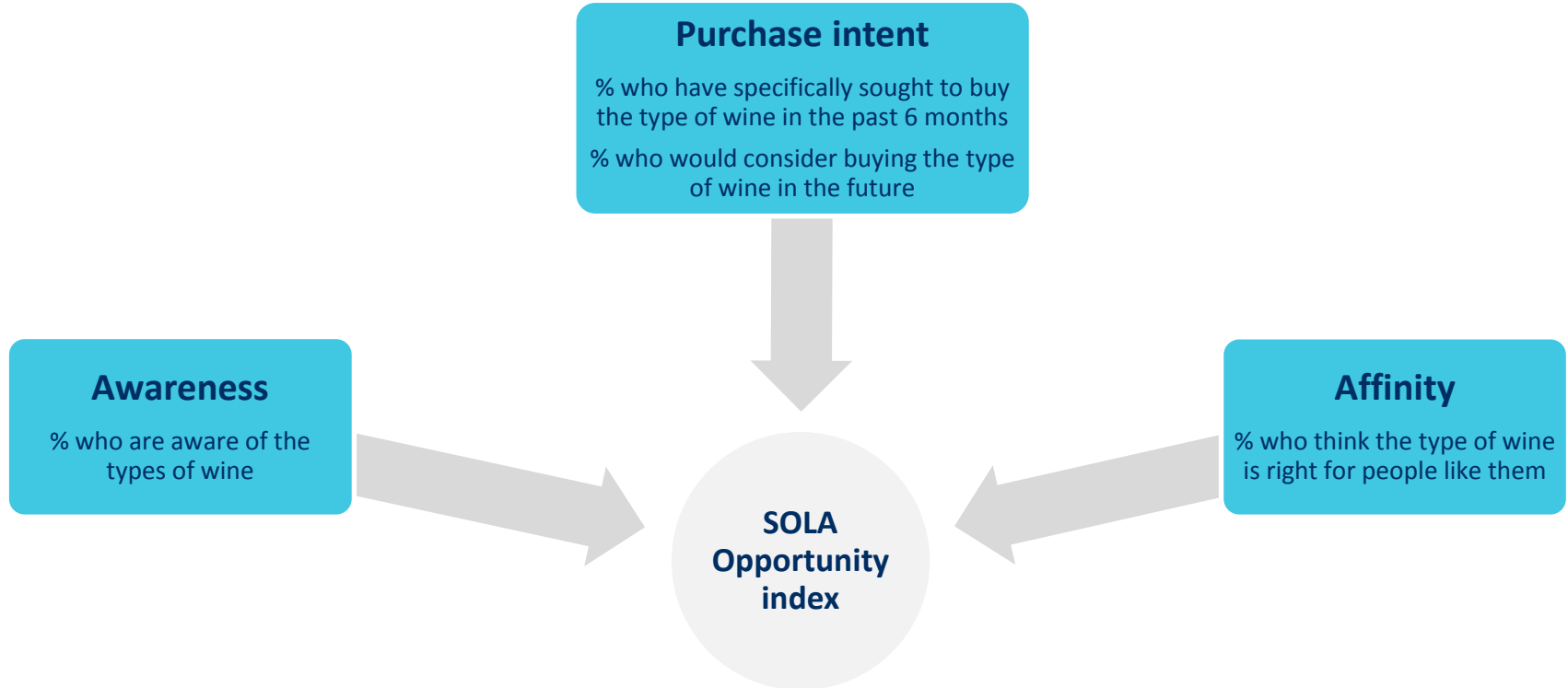
Feedback from
12,000
wine drinkers in
11 markets

The global index
is weighted to
account for
**number of
regular wine
drinkers**
in each market

Calculating the SOLA wine opportunity index

Using three measures of ‘opportunity’ – Awareness, Purchase Intent and Affinity – we created an index to show which alternative wine types had the best opportunity by market

- The index has been weighted to reflect the size of the wine drinking population in each market, enabling the SOLA wine index to be more reflective of the global market opportunity



Global SOLA wine opportunity index 2018



Organic wine achieves the highest opportunity score; more generic concepts like 'Sustainably-produced' and "Environmentally-friendly' also score highly



[GLOBAL]

Rank	Type of wine	Australia	Canada	Finland	Germany	Ireland	Japan	New Zealand	Portugal	Sweden	UK	US	Weighted opportunity index
1st	Organic wine	38	45	70	52	48	47	39	33	68	42	48	47.2
2nd	Sustainably-produced wine	35	39	51	50	40	40	40	49	40	37	44	42.6
3rd	Fairtrade wine	30	37	56	48	49	29	31	27	52	50	44	41.7
4th	Environmentally-friendly wine	35	35	48	33	41	38	36	38	35	39	45	40.1
5th	Preservative-free wine	36	35	41	30	35	57	29	33	33	27	39	38.3
6th	Sulphite-free wine	31	37	39	27	42	41	29	35	32	30	40	36.4
7th	Wine from a carbon-neutral winery	33	32	31	31	27	30	30	18	27	32	34	31.8
8th	Lower-alcohol wine	38	31	29	26	36	25	43	35	26	31	28	29.0
9th	Biodynamic wine	27	25	35	27	31	26	27	16	31	27	31	28.4
10th	Orange / skin contact wine	19	27	29	17	32	24	15	20	20	28	32	27.0
11th	Vegan wine	22	22	37	19	24	19	23	14	28	23	29	24.6
12th	Non-alcoholic wine	26	21	31	26	29	17	19	13	38	28	22	23.0

 = ranks among the top 3 in the market



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