
Global Wine SOLA Report:

Sustainable, organic & lower-alcohol
wine opportunities 2018

May **2018** Multimarket Report
Lower-alcohol press extract



Copyright

© Wine Intelligence 2018

- All rights reserved. No part of this publication may be reproduced in any form (including photocopying or storing it in any medium by electronic means) without the permission of the copyright owners. Application for permission should be addressed to Wine Intelligence.
- The source of all information in this publication is Wine Intelligence unless otherwise stated.
- Wine Intelligence shall not be liable for any damages (including without limitation, damages for loss of business or loss of profits) arising in contract, tort or otherwise from this publication or any information contained in it, or from any action or decision taken as a result of reading this publication.
- Please refer to the Wine Intelligence Terms and Conditions for Syndicated Research Reports for details about the licensing of this report, and the use to which it can be put by licensees.
- Wine Intelligence Ltd: 109 Maltings Place, 169 Tower Bridge Road, London SE1 3LJ Tel: 020 7378 1277. E-mail: info@wineintelligence.com. Registered in England as a limited company number: 4375306

Key findings

Lower-alcohol wine making some progress, but struggling with inherent quality challenges and the availability of more attractive low / no-alcohol alternative drinks

1. Lower-alcohol wine opportunity currently niche with consumers turning to other low and non-alcoholic drink choices over wine

- Lower-alcohol wine category may deliver some future potential, driven by consumer moderation trend, although observation of consumers suggests they are switching to alternatives beyond wine e.g. 'mocktails' and 'adult soft drinks' for lower or no-alcohol occasions rather than wine
- Primary current opportunity for lower-alcohol in monopoly markets with their strong focus on delivering lower-alcohol products & the changing legislation opening up the opportunity to sell lower-alcohol wine in a broader range of retail locations
- Supporting consumer appeal of more 'natural' products, stronger potential for wines naturally lower in alcohol rather than those reduced via mechanical methods predicted
- Key barrier for lower-alcohol and non-alcoholic wine are perceived poor quality levels and taste
- Lower and non-alcoholic wine opportunity:
 - Strongest opportunity for lower-alcohol wine identified in Australia and New Zealand and for non-alcoholic in Nordic markets of Finland and Sweden, with some opportunity for both in Ireland
 - Low appeal in Japan and the USA
 - Potentially more opportunity for lower-alcohol wine in emerging wine markets of China and Brazil compared with more established markets

SOLA opportunity index

Organic wine

Sustainable wine

Lower-**A**lcohol
wine

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

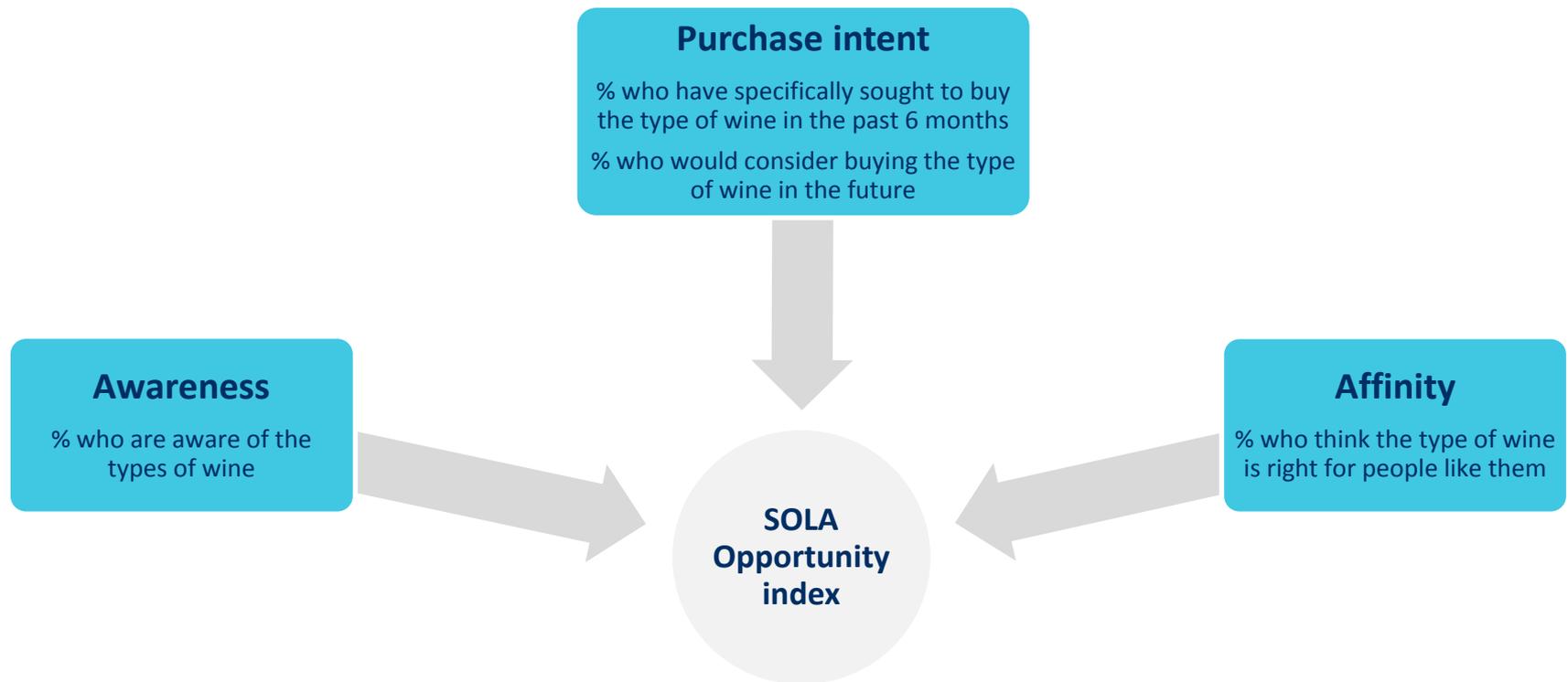
Feedback from
12,000
wine drinkers in
11 markets

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



For more information about Wine Intelligence please contact us:

Wine Intelligence
109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ
UK

Telephone: +44 (0)20 7378 1277
Email: info@wineintelligence.com
Web: www.wineintelligence.com

Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

Definitions and Interpretation

The “Agreement” means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

“WI” is Wine Intelligence Ltd, trading as Wine Intelligence.

“Customer” means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

“Proprietary Information” means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

“Licence” means the Customer’s right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

“Acceptance of Proposal” means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

“Fees” means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

“Processes” means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

“Proposal” means the specification of the Syndicated Research Report(s) by WI to the Customer

“Syndicated Research Report” means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

“Representative Organisation” means any body, association, trading group, generic organisation or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

“Subscription Products” means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, US Dollars, Australian Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

2.. Copyright

2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI’s own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions