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# Global Wine SOLA Report:

Sustainable, organic & lower-alcohol  
wine opportunities 2018

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



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# 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



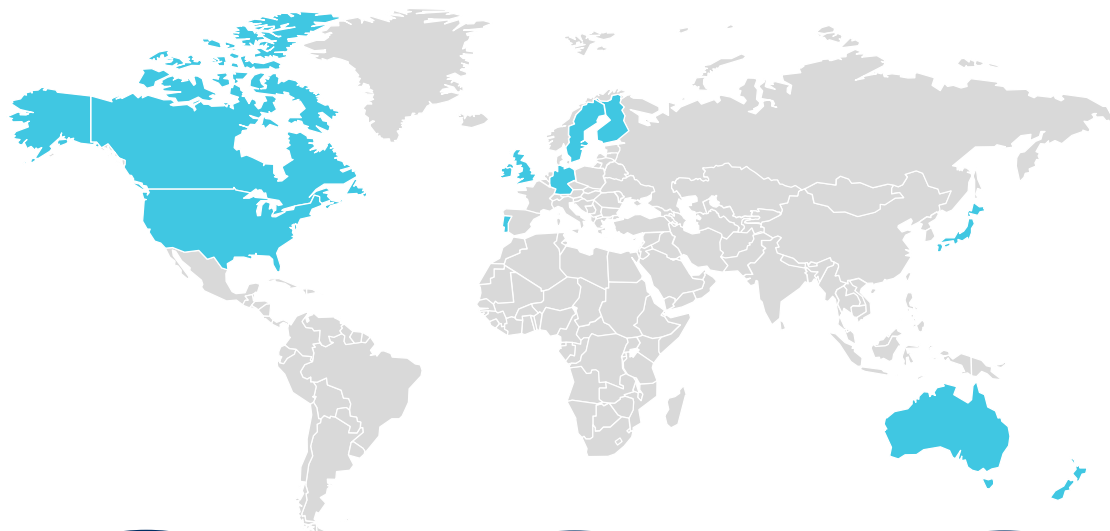
# Global SOLA wine opportunity index 2018:

## 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

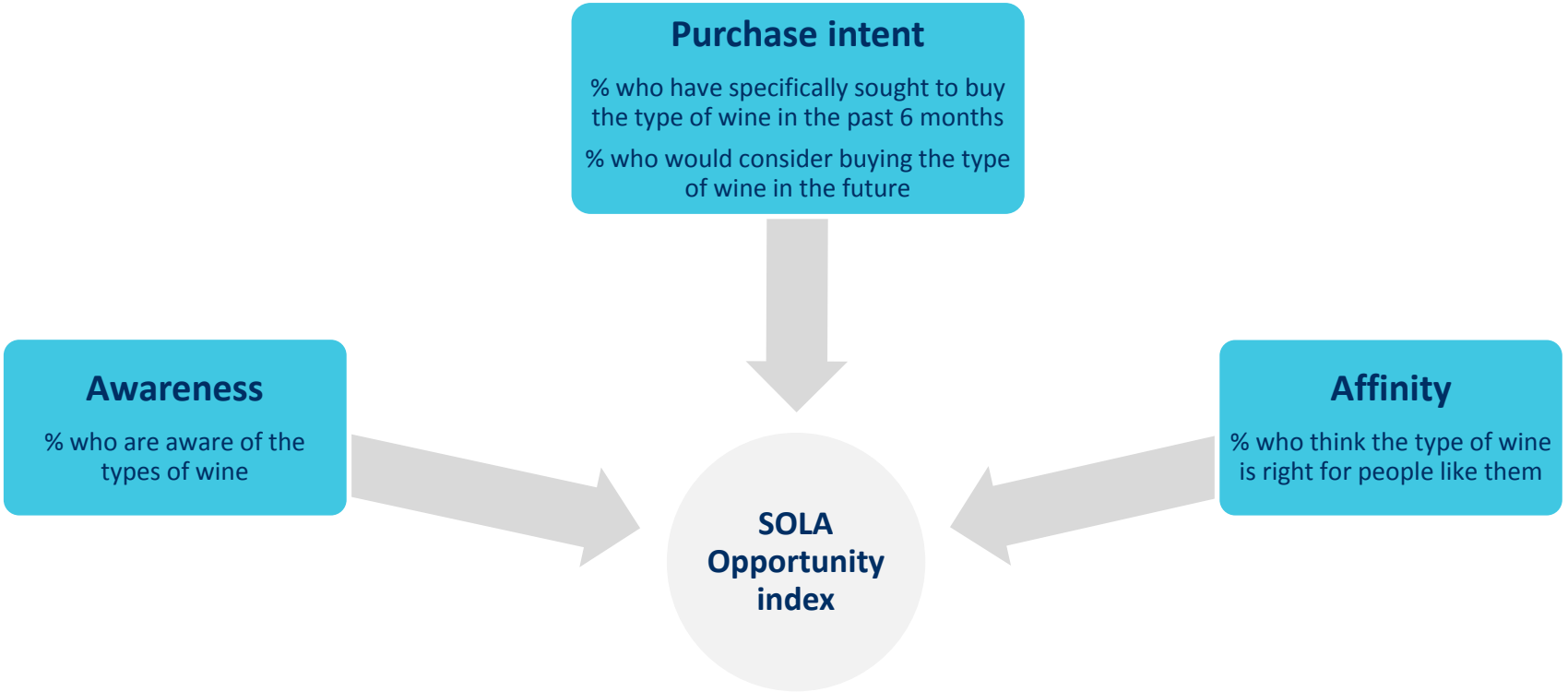
The global index  
is weighted to  
account for  
**number of  
regular wine  
drinkers**  
in each market



# 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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