



WINE INTELLIGENCE

# GERMANY WINE LANDSCAPES

JULY 2020

REPORT BROCHURE

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# INTRODUCTION

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The market for wine in Germany has a deserved reputation for being a very value-driven, low-priced environment with a big share of wine being sold through discounters. In such a harsh environment, profits are hard earned, and change – when it happens – has traditionally been evolutionary and cautious.

Latest insights in this report show that this picture is about to change. Whilst the market is still mature and stable, we can see some indications of an emerging trading up opportunity - driven by a mixture of young wine producers, entrepreneurs, new routes to market and a new consumer sentiment favouring high connection brands.

The population in Germany is getting older and so are wine drinkers, however, there seems to be a new generation of winemakers and marketers who are tailoring their product offer to the needs of their target audience. And whilst young wine drinkers are eager to explore the category – along with other beverages – they are keen to connect with brands

and use them as an orientation in a very complex environment.

High connection brands in the still wine category indicate there may be an opportunity to develop market positions with focused, innovative strategies competing with mainstream brands.

These changes seem to have been boosted rather than held back during the Coronavirus pandemic and the lockdown period. Consumers have stayed engaged through various online tastings and social media interactions. The existence of several well managed and effective e-commerce platforms in Germany has added fuel to this trend, given the difficulties (real or perceived) of going into a store during the lockdown period.

It will be interesting to observe how the industry finds ways to attract and serve this broad range of ages with an equally diverse range of experience, including touchpoints used to connect with the retailers / manufacturers and product needs.

# PRICING



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# RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Germany in March 2016, January 2019, and March 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of German regular wine drinkers in terms of gender, age, and region

The distribution of the sample is shown in the table

		<i>Mar-16</i>	<i>Jan-19</i>	<i>Mar-20</i>
		<i>n= 1,005</i>	<i>1,014</i>	<i>1,000</i>
<b>Gender</b>	Male	43%	43%	43%
	Female	57%	58%	57%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Age</b>	18 - 24	5%	4%	4%
	25 - 34	12%	12%	12%
	35 - 44	18%	16%	16%
	45 - 54	23%	22%	22%
	55 and over	42%	46%	46%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Region</b>	Baden-Württemberg	14%	15%	15%
	Bayern	16%	17%	17%
	Berlin	4%	4%	4%
	Brandenburg + Mecklenburg-Vorpommern	6%	5%	5%
	Bremen + Niedersachsen	10%	10%	10%
	Hamburg + Schleswig-Holstein	5%	6%	6%
	Hessen	7%	7%	7%
	Nordrhein-Westfalen	19%	19%	19%
	Rheinland-Pfalz + Saarland	7%	6%	6%
	Sachsen + Sachsen-Anhalt + Thüringen	12%	11%	11%
		<b>Total</b>	<b>100%</b>	<b>100%</b>

Wine Intelligence, Vinitrac® Germany, March 2016 (n=1,005), January 2019 (n=1,014) and March 2020 (n=1,000), German regular wine drinkers

# RESEARCH METHODOLOGY: QUALITATIVE



## TRADE INTERVIEWEES

Trade Interviews were conducted with five experienced industry professionals in the German wine trade in July 2020

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The five interviewees were members of the wine trade working in different roles:

*1 x Wine Producer (Managing Director)*

*2 x Wine Distributor (Managing Director / Marketing Director)*

*1 x Wine Specialist Retailer (Managing Director)*

*1x Wine Business Development Manager*

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