



WINE INTELLIGENCE

SWEDEN:

WINE PACKAGING FORMATS

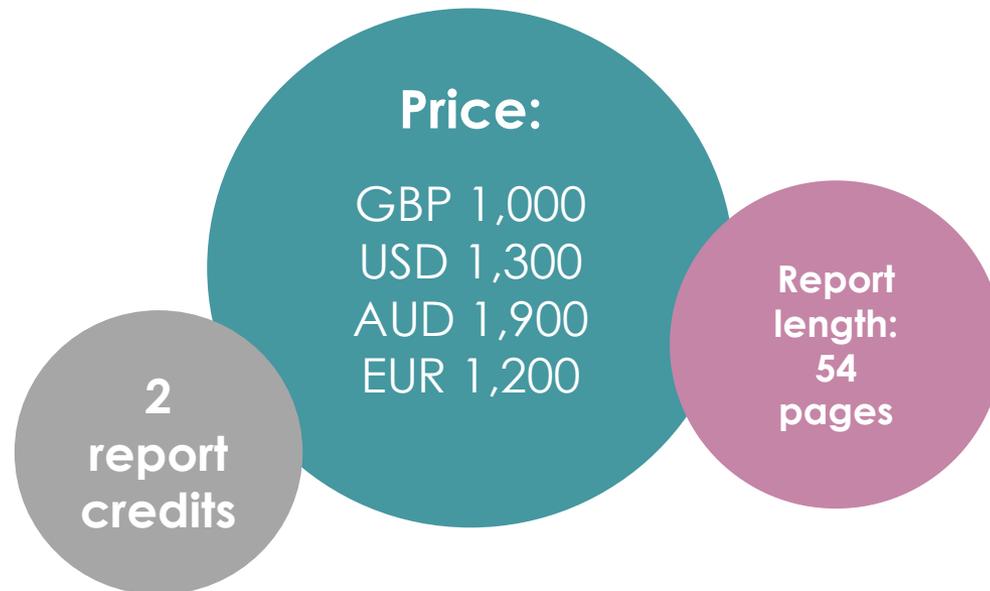
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INTRODUCTION



The Swedish wine market continues to provide promising opportunities for alternative packaging formats beyond 75cl glass and bag-in-box and compared with other global markets, there is much more openness and willingness to purchase alternative packaging formats in Sweden.

A striking characteristic of the Swedish market is in the universal awareness and appeal of all packaging formats for wine, particularly when compared with other markets in Europe and beyond. There are only very minor differences in terms of the gender, age or wine involvement levels of wine drinkers and their purchase, consideration and affinity for all wine packaging types, partly reflecting the structure of a monopoly market and the strategy focusing on responsibility and sustainability driven by Systembolaget.

Our new research on packaging format preferences in Sweden is showing a growing openness towards wine in a can amongst Swedish wine drinkers, albeit from a small base. A key opportunity for producers keen to develop a following for new wine brands lies in wine in cans, with drinkers in Sweden turning to cans as a way to trial new products, styles and brands. Over the past year for example, there has been a rise to over one third of wine drinkers who would consider purchasing wine in a can in Sweden.

However the 'winner' in terms of a wine packaging format opportunity in Sweden for 2020 is the PET (plastic) bottle. The proportion of regular Swedish drinkers who have purchased wine in this format increasing to over a quarter of all regular wine drinkers. According to trade experts, wine drinkers in Sweden have been encouraged to move towards

PET, based on increased listings and therefore visibility of PET in Systembolaget stores. Consumer environmental consciousness is additionally supporting an openness and demand for PET, along with the practical benefits of this format (unbreakable) particularly for transporting to summer houses for example and being lighter to carry from store.

As well as supporting sustainability, value and convenience act as key purchase drivers among Swedish wine drinkers when it comes to purchasing across the range of packaging formats. Bag-in-box continues to be viewed by consumers as delivering value for money and convenient to carry therefore remaining a dominant part of the everyday norm in Sweden.

Despite the increasing environmental consciousness of consumers driving the purchase of alternative packaging, the main barrier to purchasing alternative packaging formats is the underlying preference for standard glass bottles. Smaller format bottles are seen as delivering comparatively poor value for money, whilst bag-in-box is considered to not keep wine as fresh. Additionally, the alternative packaging formats are strongly associated with specific wine drinking occasions - standard glass bottles and magnums for formal occasions, canned wine for on-the-go and bag-in-box for informal social events.

Nevertheless, the open-minded attitudes of Swedish wine drinkers alongside the strategies and focus of Systembolaget will continue to drive alternative packaging formats for wine in the years to come.

RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Sweden in March 2018, March 2019 and July 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 Swedish regular wine drinkers in terms of age and gender

The distribution of the sample is:

		Mar-18	Mar-19	Jul-20
	<i>n=</i>	1,000	1,000	500
Gender	Male	51%	48%	48%
	Female	49%	52%	52%
	Total	100%	100%	100%
Age	18-24	9%	5%	5%
	25-34	15%	13%	13%
	35-44	15%	13%	13%
	45-54	17%	18%	18%
	55 and over	44%	51%	51%
	Total	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Sweden March 2018 (n=1,000), March 2019 (n=1,000) and July 2020 (n=500) Swedish regular wine drinkers

TRADE INTERVIEWEES

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

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

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

1 x Wine Importer

1 x Wine Journalist

1 x Wine Educator

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