



WINE INTELLIGENCE

FINLAND WINE LANDSCAPES 2021

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INTRODUCTION



In common with other established and mature European markets, the wine drinking population of Finland is on the decline – down to 1.5 million regular wine drinkers in 2021, compared with 1.9 million in 2018.

Around half of this population is now represented by consumers aged 55 and over, who make up to 49% of Finnish regular wine drinkers. Boomers and Gen X are the most frequent wine drinkers, whilst nearly three quarters of Gen Z only drink wine monthly.

New trends have surfaced this year, partially enhanced by the Covid-19 pandemic. Having been a strong market for wines from the New World for many years – especially Chile - key Old World production countries are gaining ground. Chile remains the most widely consumed country, but has lost some of its audience, while Germany, Portugal and Italy have grown. Italy in particular has benefited from the boom in sparkling wine consumption, led by Prosecco, which now ranks as the #1 region in terms of purchase incidence. Portugal is growing fast with a Portuguese brand now established in the top 5 in the Wine Intelligence Brand Power Index for Finland. Germany is on the rise too, led by the Mosel region and the Riesling grape. Providing an elegant and dry style of wine, Riesling has emerged as the preferred grape variety for white wine. Changes in consumer tastes, successful

communication initiatives and new offerings appear to have stimulated this development, according to experts interviewed for this report.

Bag in box wines are generally stronger in Scandinavian countries, and this format has a significant market share. The Covid-19 pandemic provoked a boost in demand for this type of format while the less recent advantageous tax system for sustainable packaging also stimulated its appeal.

Simultaneously, we have also observed a growing movement of Finnish wine drinkers towards premium wines. Finnish regular wine drinkers have been spending more this year across all off-premise occasion types, though as yet the trend for trading up has not been reflected in on-premise consumption.

Unsurprisingly, Covid-19 restrictions on travel notably reduced retail shopping to adjacent countries (Sweden, Estonia, etc.). To alleviate this, wine drinkers, especially the younger generations, shifted to overseas online buying, a trend which is expected to grow even more in the future.

EXAMPLE SLIDE: MANAGEMENT SUMMARY



REGULAR WINE DRINKER POPULATION DECLINING, BECOMING MORE DOMINATED BY 55+

Significant increase in the proportion of wine consumers aged 55+

Boomers (those aged 55+) today account for nearly half of the population of Finnish regular wine drinkers at 49%, a significant increase since 2014 (38%)

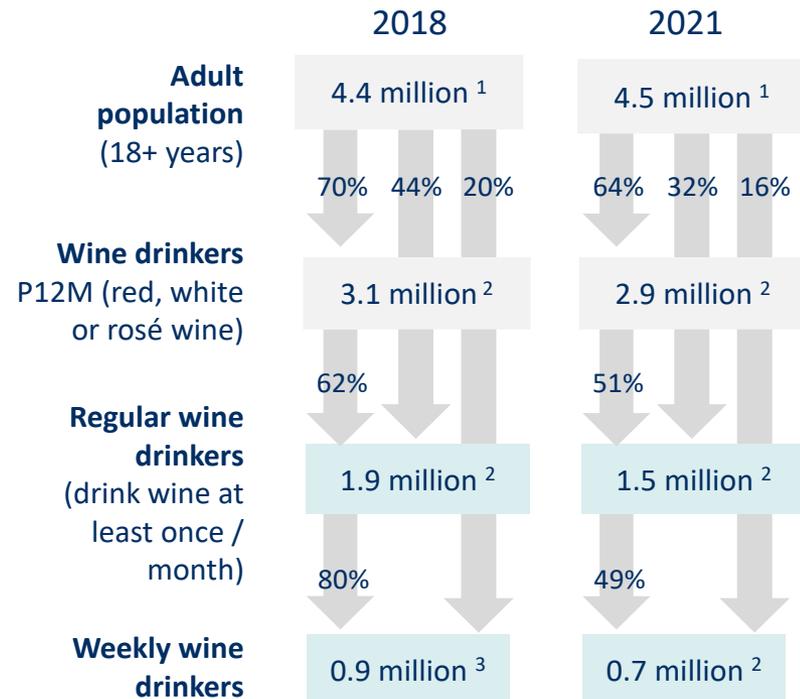
All of the other generations are now representing a smaller proportion of wine drinkers, though these drops are not significant

This trend follows the country's general change of population structure; Finland is the second fastest ageing country in the world after Japan⁴

We have also noted a decline in regular wine drinker population, now down to 1.5 million drinkers (as opposed to 1.9 million in 2014) although the overall population has increased during the period

These changes consequently affect the wine market, with distinct age groups behaving differently with the wine category

Changes in the wine drinking population



Source: Wine Intelligence, Vinitrac® Finland, October 2014 and January 2021 (n≥1,000) Finnish regular wine drinkers

1 Statistics Finland, Population projection 2015 and 2021 by Sex and Age

2 Wine Intelligence online calibration study with YouGov, 2018, 2019, 2021, n=2,015 Finnish adults. Wine=still light wine (red, white, rosé)

3 Wine Intelligence, Vinitrac® Finland, Oct' 17 and Jan'21, n=1,000 Finnish regular wine drinkers®

4 Enabling active ageing in Finland - thisisFINLAND

EXAMPLE SLIDE: RED VARIETAL CONSUMPTION



Cabernet Sauvignon and Merlot continue to dominate a red wine varietal list that is largely stable since 2014

Red varietal **consumption**: Tracking

% who have drunk the following varietals or wine types in the past 6 months
Base = All Finnish regular wine drinkers (n≥1,000)

Rank 2021	n=	2014	2017	2020	2021	Tracking		
		1,015	1,000	1,000	1,000	vs. '14	vs. '17	vs. '20
1	Cabernet Sauvignon	52%	50%	52%	48%	→	→	→
2	Merlot	54%	51%	50%	47%	↓	↓	→
3	Pinot Noir	42%	45%	46%	44%	→	→	→
4	Shiraz / Syrah	43%	45%	47%	42%	→	→	↓
5	Tempranillo	20%	21%	22%	23%	→	→	→
6	Malbec	22%	22%	24%	22%	→	→	→
7	Pinotage	12%	13%	13%	14%	→	→	→
8=	Sangiovese	11%	9%	9%	10%	→	→	→
8=	Zinfandel	7%	6%	9%	10%	↑	↑	→
8=	Carménère	9%	11%	10%	10%	→	→	→
11	Grenache	6%	5%	4%	5%	→	→	→
12	Gamay	3%	3%	2%	2%	→	→	→
	Other	2%	2%	2%	2%	→	→	→
	Don't know	19%	17%	18%	18%	→	→	→

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Finland, October 2014, October 2017, January 2020 and January 2021 (n≥1,000) Finnish regular wine drinkers

EXAMPLE SLIDE: OFF-TRADE: SPEND ON WINE BY OCCASION

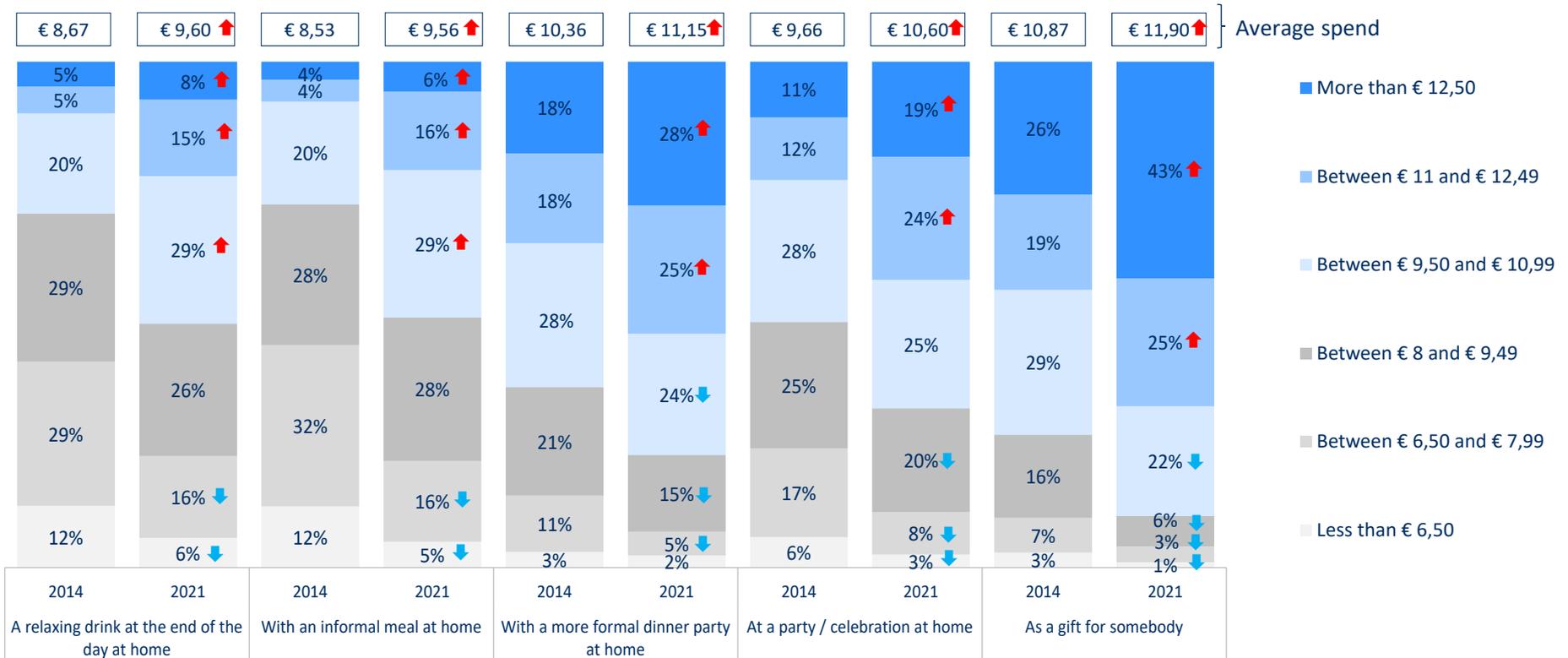


Finnish people are spending more on wine across all occasion types, with the average price paid per bottle rising by around 10% over the past 7 years, ahead of inflation

Off-trade: Spend on wine by occasion

Note that annual inflation in Finland has averaged less than 1% since 2014

% who typically spend the following amount on a bottle of wine on each occasion
Base = Those who drink wine on each occasion



↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Finland, October 2014 and January 2021 (n≥1,000) Finnish regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE



- The data was collected in Finland in October 2014, October 2017, January 2020 and January 2021
- Data was gathered via Wine Intelligence’s Vinitrac® online survey
- Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought 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 Finnish regular wine drinkers in terms of age and gender
- The distribution of the sample is shown in the table:

		<i>Oct'14</i>	<i>Oct'17</i>	<i>Jan'20</i>	<i>Jan'21</i>
		<i>n= 1,015</i>	<i>1,000</i>	<i>1,000</i>	<i>1,000</i>
Gender	Male	52%	52%	48%	48%
	Female	48%	48%	52%	52%
	Total	100%	100%	100%	100%
Age	18-24	9%	9%	7%	7%
	25-34	17%	16%	14%	14%
	35-44	16%	16%	14%	14%
	45-54	19%	16%	16%	16%
	55 and over	38%	43%	49%	49%
	Total	100%	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Finland, October 2014 (n = 1,015), October 2017 (n = 1,000) January 2020 (n=1,000) and January 2021 (n=1,000), Finnish regular wine drinkers

RESEARCH METHODOLOGY: QUALITATIVE



TRADE INTERVIEWEES

Trade Interviews were conducted with four experienced industry professionals in the Finland wine trade in 2021

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

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

1 x Wine Importer

2 x Commercial Directors

1 x Business Unit Director

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