



WINE INTELLIGENCE

# SOUTH KOREA WINE LANDSCAPES 2021

JUNE 2021

REPORT BROCHURE

# PRICING



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# INTRODUCTION



In an era of disruption that characterised the ongoing COVID-19 pandemic, the most significant development of the past year in the South Korean wine market has been the government's relaxation of the laws surrounding the purchase of alcohol online. Having only been introduced in mid 2020 to South Korea, online wine buying is something that one in five South Korean wine drinkers have done in the past six months.

The change in the routes to market landscape may or may not be connected with a surge in interest in the wine category, led by younger adult consumers, but the evidence suggests the two are linked. Wine sales in South Korea have risen by almost a quarter in 2020, capping a strong period of growth since 2016.

Even with this impressive growth, wine remains a small player by global standards in the South Korean alcohol market. At 5.5 million cases, volumes are tiny for a nation with nearly 32 million adults and a traditional thirst for alcoholic drinks. Neighbouring Japan drinks three times as much wine on a per-capita basis. Even China drinks more wine per person.

Part of the issue with wine and Koreans is that it is not a part of everyday life. Only 13% of adults (4 million) say they drink wine on a weekly basis, though this is up from just over 3 million in 2017. The category has struggled to appeal to younger drinkers in a market where beer and soju are the main social and relaxing drinks.

However, change may be coming. Wine is considered to be the category that has benefited significantly from the government loosening its stance on alcohol e-commerce. The main factor behind this

trend is the democratisation of information to the consumer regarding the wine they are purchasing. Whereas previously a purchase of wine was either an intimidating visit to a specialist shop, or guesswork at the supermarket shelf, now consumers can use their ubiquitous smartphones, and the information they provide, to make their choices. South Korean retailers that have implemented an alcohol e-commerce system have been reporting significant increases in their sales of wine when compared with the same time last year.

The South Korean wine market has also become one where brands dominate the space as opposed to countries or regions of origin. In 2021, awareness and purchase has increased when compared with our previous wave of data for brands of all sizes be they mainstream or niche within the market. Adding to this, when making their purchasing decision South Korean consumers are less influenced by the country and region of origin than when compared with 2017 which highlights the movement of the Korean market to becoming a brand-oriented space.

The combination of a disrupted on-trade, and more opportunities to buy wine using an app, appear to be provoking a re-evaluation of the role of wine within South Korean society, especially among the educated urban younger drinkers. We estimate that the wine drinking population has expanded by just under a million drinkers since 2017, and around half of these new entrants are aged 19 (the legal drinking age) to 24. The future therefore looks quite encouraging for wine producers selling in South Korea.

# EXAMPLE SLIDE: MANAGEMENT SUMMARY



## Consumption trends in the South Korean wine market

### Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2017	2021	
Beer	84%	87%	
Red wine	88%	86%	
Soju	75%	76%	
White wine	62%	57%	↓
Other sparkling wine	36%	29%	↓

### Top countries of origin

% who have drunk wine from the following places in the past 6 months

	2017	2021	
France	79%	77%	
Chile	73%	70%	
Italy	54%	58%	
Spain	50%	56%	↑
California - USA	49%	50%	

### Top red varietals

% who have drunk the following varietals or wine types in the past 6 months

	2017	2021	
Cabernet Sauvignon	50%	55%	↑
Bonarda	18%	17%	
Merlot	14%	17%	
Shiraz / Syrah	13%	16%	↑
Petit Verdot	15%	16%	

### Top white varietals

% who have drunk the following varietals or wine types in the past 6 months

	2017	2021	
Sauvignon Blanc	41%	44%	
Chardonnay	26%	30%	↑
Moscato / Muscat	28%	29%	
Sémillon	16%	18%	
Colombard	13%	15%	

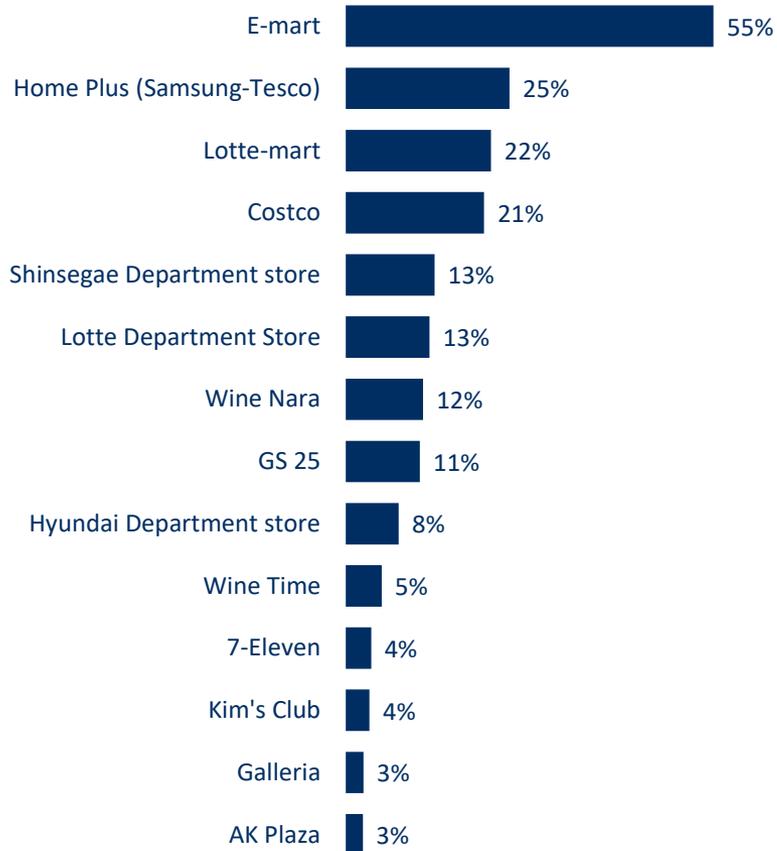
# EXAMPLE SLIDE: WINE-BUYING RETAILER USAGE



E-mart still dominates the retailer space, followed by Home Plus

## Wine-buying retailer usage: Top 14

% who mainly use the following retailers to buy wine  
Base = Those who buy wine in the off-trade



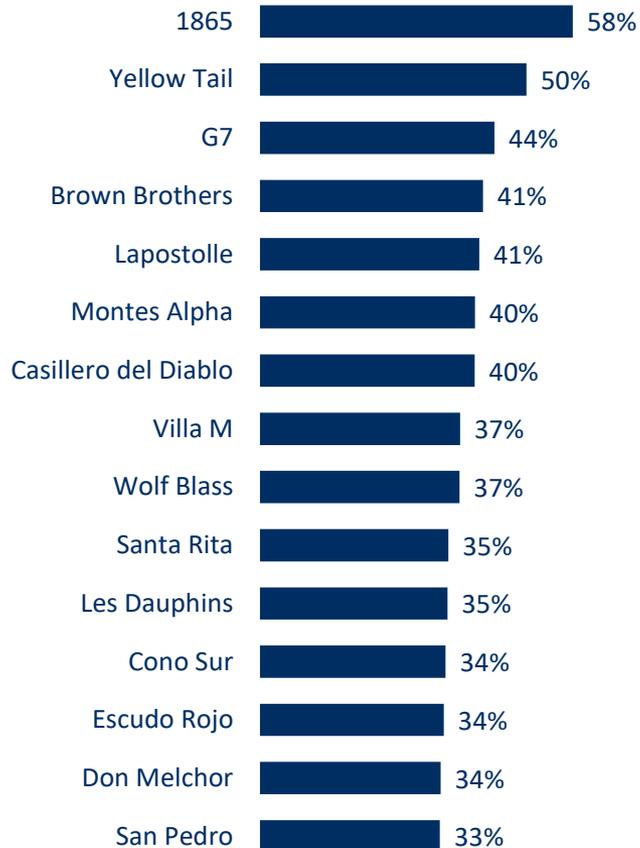
# EXAMPLE SLIDE: BRAND HEALTH: CONSIDERATION



1865 has the highest level of consideration within the market

## Consideration: Top 15 brands

% who would consider buying the following brands  
Base = Those who have heard of each brand



*“Which of the following brands would you consider buying?”*

# RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in South Korea in July 2017, October 2019, March 2020 and March 2021

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

Respondents were screened to ensure that they were 19-64 years old; drank imported red, white or rosé wine at least twice a year; and have 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 South Korean regular wine drinkers in terms of gender and age

The distribution of the sample is shown in the table

		Jul-17	Oct-19	Mar-20	Mar-21	
		<i>n=</i>	<b>1,000</b>	<b>1,592</b>	<b>1,000</b>	<b>1,000</b>
<b>Gender</b>	Male	51%	46%	46%	46%	
	Female	49%	54%	54%	54%	
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	
<b>Age</b>	19-24	7%	11%	11%	11%	
	25-34	20%	18%	18%	18%	
	35-44	26%	24%	24%	24%	
	45-54	36%	30%	32%	33%	
	55-64	12%	18%	16%	14%	
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	

Source: Wine Intelligence, Vinitrac® South Korea, July 2017 (n=1,000), October 2019 (n=1,000), March 2020 (n=1,000) and March 2021 (n = 1,000), South Korean regular wine drinkers

# RESEARCH METHODOLOGY: QUALITATIVE

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## MARKET EXPERT INTERVIEWEES

Market Interviews were conducted with one experienced industry professional in the South Korean wine trade in 2021

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

The interviewee was a wine industry professional working within the market

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