



SWEDEN WINE LANDSCAPES 2021

JUNE 2021

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INTRODUCTION



Sweden's wine drinkers are emerging from Covid with more confidence than a year ago and more intentions to go out, drink alcohol and have a good time. This sounds like good news for the wine category, which has already had an extraordinarily good 2020 in Sweden. However there are some clouds on the horizon which may dampen the party mood.

The good news is that wine volumes in Sweden surged by 9% in 2020, with Old World countries taking the lion's share of the gains, and the US and South Africa also doing well. Such leaps in consumption don't often happen in mature markets, and in Sweden's case, the Covid pandemic is largely responsible for the change. Prior to 2020, the market had been static at about 20 million 9L cases, with the only trend being the steady growth of Old World at the expense of New World source countries.

The main driver of change appears to be growing numbers of high frequency wine drinkers – those drinking wine at least twice a week – and long-term growth in involvement in the category, and its connection with a positive lifestyle.

Short-term changes in purchasing options, including the burgeoning e-commerce wine retail sector, also appears to be driving growth in volumes, as well as spend per bottle, the latter edging up by around 8-10% over the past 4 years, and hitting an average of SKr 116 per bottle for special occasions.

On the other hand, the evidence from this year's Landscape report also contains some worrying long-term trends. The Swedish wine market is growing increasingly reliant on high frequency wine drinkers over the age of 55, and the category appears to be losing the interest of younger adult drinkers, particularly those between the legal drinking age of 18 and 24. The Gen-Z group, if they are drinking wine at all, are shifting between a wide array of beverages, especially cider and cocktails, and still wine especially is struggling for attention. Fortunately, younger adult consumers are much more engaged in the sparkling wine category, which has continued its strong growth story in 2020 despite restrictions on socialising and celebrations arising from Covid.

For the moment, then, Sweden stands out as one of the most positive markets in which to sell wine within Europe at the moment. With economic and social confidence returning, its growth is likely to continue in 2021, though its longer-term prospects look less bright unless wine can carve out a place in younger adult drinks repertoires.

EXAMPLE SLIDE: MANAGEMENT SUMMARY



CONFIDENCE RETURNING TO SWEDISH WINE DRINKERS

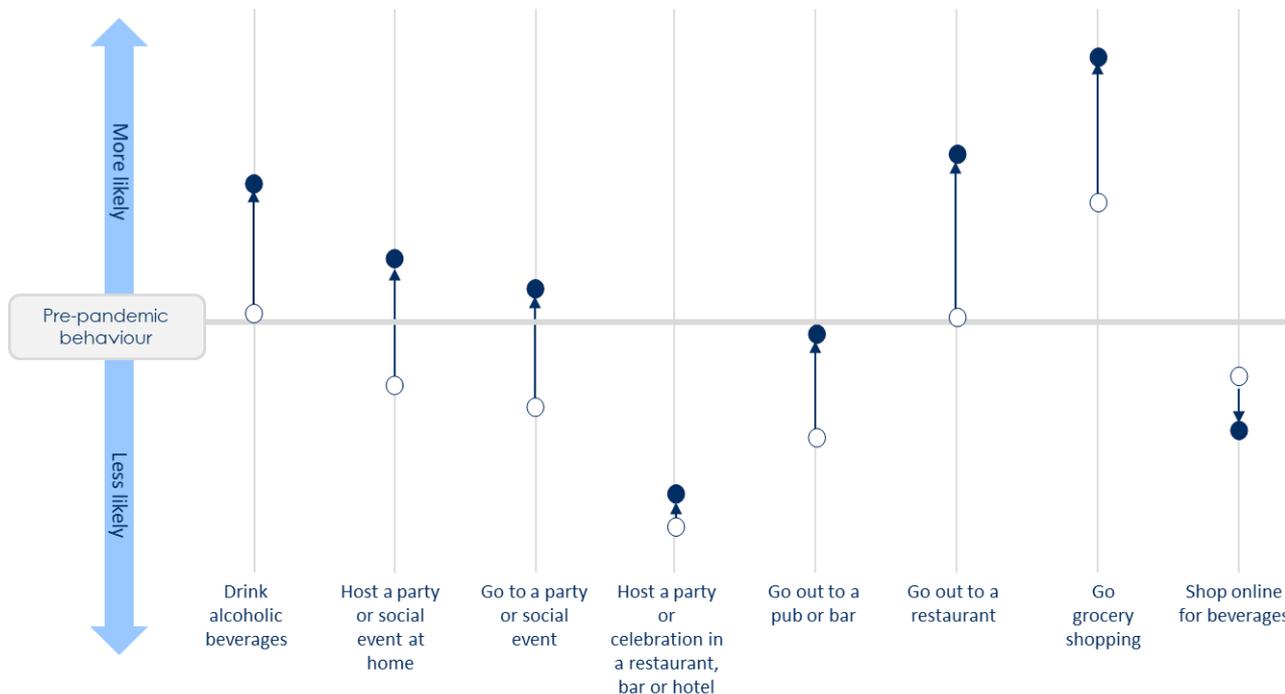
Swedish regular wine drinkers are much more confident about going out to eat and socializing in home compared with March 2020

Swedes are more likely to host social events at home compared to their pre-pandemic behaviour, as they remain much less likely to do the same in on-trade venues. However, they are much more optimistic about going to parties and social events and out to restaurants now compared to March 2020

Anticipated behavior post-pandemic: Socialising, food and drink

Indexed change in anticipated behaviour in March 2020 and January 2021
Base = All Swedish regular wine drinkers (n=1,000)

- March 2020
- January 2021



EXAMPLE SLIDE: ATTITUDES TOWARDS WINE



Both Gen Zs and Millennials tend to be more price conscious and more willing to experiment with their choices of wine while Boomers in comparison are more conservative in their wine selections

Attitude towards wine: Tracking

Base = All Swedish regular wine drinkers (n≥1,000)

	n=	2017	2019	2020	2021	Tracking		
		1,000	1,000	1,000	2,000	vs. '17	vs. '19	vs. '20
I enjoy trying new and different styles of wine on a regular basis		48%	54%	52%	50%	➔	➔	➔
I don't mind what I buy so long as the price is right		13%	12%	14%	13%	➔	➔	➔
I know what I like and I tend to stick to what I know		39%	34%	34%	37%	➔	➔	➔

Attitudes towards wine by age

Base = All Swedish regular wine drinkers (n=2,000)

	n=	All Swedish regular wine drinkers	Age groups			
			18-24 Gen Z	25-39 Millennials	40-54 Gen X	55+ Boomers
I enjoy trying new and different styles of wine on a regular basis	2,000	50%	110	399	471	1020
I don't mind what I buy so long as the price is right		13%	29%	21%	12%	8%
I know what I like and I tend to stick to what I know		37%	15%	23%	37%	45%

Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

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

Source: Wine Intelligence, Vinitrac® Sweden, Mar'17, Mar'19, Mar'20, Jan'21+Mar'21, (n≥1,000) Swedish regular wine drinkers

EXAMPLE SLIDE: COUNTRY OF ORIGIN AWARENESS



All countries of origin have seen their awareness levels drop when compared with their 2017 figures; and except for Italy all the other top 6 countries have seen their awareness levels continue to fall throughout 2019 and 2020

Country of origin awareness: Tracking

% who know the following places produce wine
Base = All Swedish regular wine drinkers (n≥1,000)

Rank 2021	n=	2017	2019	2020	2021	Tracking		
		1,000	1,000	1,000	2,000	vs. '17	vs. '19	vs. '20
1=	Italy	87%	85%	85%	82%	↓	→	→
1=	Spain	88%	86%	85%	82%	↓	↓	↓
3	France	88%	88%	87%	81%	↓	↓	↓
4	Chile	81%	80%	80%	76%	↓	↓	↓
5	South Africa	81%	80%	77%	74%	↓	↓	↓
6=	Australia	79%	76%	75%	71%	↓	↓	↓
6=	California - USA	80%	76%	72%	71%	↓	↓	→
8	Germany	75%	71%	73%	69%	↓	→	↓
9	Portugal	77%	67%	70%	66%	↓	→	→
10	Argentina	75%	65%	65%	63%	↓	→	→
11	New Zealand	65%	59%	62%	58%	↓	→	↓
12	Other USA (outside of California)	42%	29%	33%	31%	↓	→	→
13	Other	8%	6%	8%	8%	→	↑	→

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

Source: Wine Intelligence, Vinitrac® Sweden, Mar'17, Mar'19, Mar'20, Jan'21+Mar'21, (n≥1,000) Swedish regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE



- The data was collected in Sweden in March 2017, March 2019, March 2020, January 2021 and March 2021
- Data was gathered via Wine Intelligence’s Vinitrac® online survey
- Respondents were screened to ensure that they were 18-64 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 Swedish regular wine drinkers in terms of age and gender
- The distribution of the sample is shown in the table:

		Mar-17	Mar-19	Mar-20	Jan-21 & Mar-21
		<i>n=</i>	<i>1,000</i>	<i>1,000</i>	<i>2,000</i>
Gender	Male	51%	48%	48%	49%
	Female	49%	52%	52%	51%
	Total	100%	100%	100%	100%
Age	18-24	9%	5%	5%	6%
	25-34	15%	13%	13%	14%
	35-44	15%	13%	13%	13%
	45-54	17%	18%	18%	17%
	55 and over	44%	51%	51%	51%
	Total	100%	100%	100%	100%

Source: Wine Intelligence, Sweden, March 2017 (n=1,000), March 2019 (n=1,000), March 2020 (n=1,000) and January 2021 & March 2021 (n=2,000) Swedish regular wine drinkers

COVID MODULE RESEARCH METHODOLOGY: QUANTITATIVE



- The data was collected in Sweden in March 2020 and January 2021
- Data was gathered via Wine Intelligence's Vinitrac® online survey
- Respondents were screened to ensure that they were 18-64 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 Swedish regular wine drinkers in terms of age and gender
- The distribution of the sample is shown in the table:

		Mar-20	Jan-21
		<i>n=</i>	<i>n=</i>
Gender	Male	48%	48%
	Female	52%	52%
	Total	100%	100%
Age	18-24	5%	5%
	25-34	13%	13%
	35-44	13%	13%
	45-54	18%	18%
	55 and over	51%	51%
	Total	100%	100%

Source: Wine Intelligence, Sweden, March 2020 (n=1,000) and January 2021 (n=1,000) Swedish regular wine drinkers

RESEARCH METHODOLOGY: QUALITATIVE



TRADE INTERVIEWEES

Trade Interviews were conducted with four experienced industry professionals in the Swedish 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:

2 x Wine Suppliers

1 x Wine Journalist

1 x Head of Category Management

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