WINE INTELLIGENCE

POLAND WINE LANDSCAPES

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REPORT BROCHURE

PRICING

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INTRODUCTION

Poland is the 5th most attractive wine market in our Global Compass 2020 report, up nine places from 2019 and is also on a good track to be part of the top 10 again this year. A great performance, supported by evidence from wine-specific market metrics to positive economic outlook.

Wine consumption has been continuously increasing amongst Polish people (where it has decreased for many developed European countries). Already a predominantly an off-trade market, occasions to drink wine at home have only multiplied over the past 18 months. With more drinkers consuming wine on a weekly basis, this population has now reached over 7 million.

Although price remains one of the top three choice cues when buying wine, wine spending has significantly increased and was only mildly affected by the pandemic. If anything, Polish wine drinkers are willing to treat themselves more post-Pandemic, buying better quality wine and trying new alcoholic drinks. A premiumisation phenomenon has also been observed for the last couple of years.

Attitude towards the wine category is generally very positive, with drinkers showing more flexible and explorative behaviours in this field, along with an inquisitive eagerness to enhance their category knowledge. All wine involvement indicators are on the rise, and nearly one in two drinkers have reported wine as being an important part of their lifestyle.

These progressions are evidently supported by a strong economy. Poland is indeed one of the fastest growing economies in Europe and one that is becoming increasingly influential in a European Union context. Disposable incomes have remarkably increased these past few years, providing a stronger purchasing power for wine. Although the economic growth has been affected by the Pandemic crisis, the impact was relatively insignificant compared to other surrounding countries. Poland's Growth Domestic Product (GDP) is expected to bounce back by 3.7% this year and predicted to grow by 4.7% in 2022.

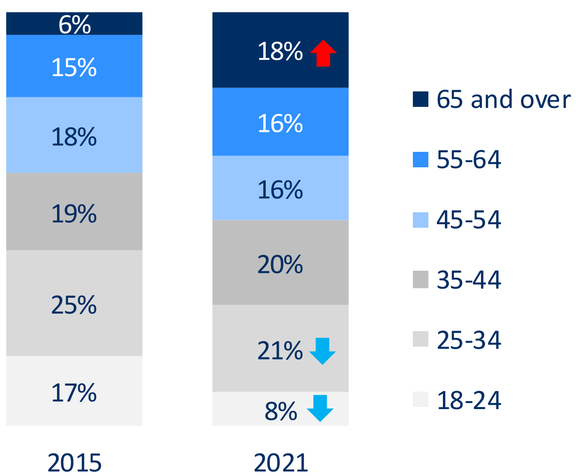
Poland obviously relies on imports, but it is one of the few markets in Europe where the typical Old World markets do not dominate overall. Eastern European wines are very popular (Bulgaria, Moldavia, Hungary, Georgia) but also US and Chile are increasingly well-known and appreciated.

All of this leads to Poland being a strong opportunity market, especially for global brands, even more so as it continues to develop with consumers increasingly looking to core and recognisable brands.

EXAMPLE SLIDE: DEMOGRAPHICS OF POLISH REGULAR WINE DRINKERS

Between 2015 and 2021, the major changes in demographics have been: ageing population – but not as much as neighbour Germany – and increasing household incomes

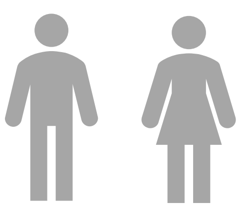
Age



Wine category involvement

	2015	2021
High	39%	35%
Medium	32%	42%
Low	29%	23%

Gender



2021	46%	54%
2015	43%	57%

Total household income (before tax)

	2015	2021
Less than 2,000 PLN	10%	4%
Between 2,000 - 3,999 PLN	26%	17%
Between 4,000 - 5,999 PLN	26%	23%
Between 6,000 - 7,999 PLN	14%	23%
More than 8,000 PLN	9%	28%
No income	1%	0.4%
Prefer not to answer	14%	5%

/ : Statistically significantly higher / lower than the 2015 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

EXAMPLE SLIDE: **PANDEMIC PERSONAL IMPACT**

Gen Z has been the most affected by the pandemic in terms of knowing someone who has had Coronavirus or having had it themselves; they're also the group that have had the highest loss of employment

Pandemic personal impact

'% who have been personally impacted by the recent Coronavirus pandemic in the following ways
Base = All Polish semi-annual wine drinkers (n=1,001)

	All Polish semi-annual wine drinkers	19-24 Gen Z	25-39 Millennials	40-54 Gen X	55-64 Boomers
n=	*1,001*	*82*	*326*	*245*	*348*
A member of my family or close friend has had Coronavirus	45%	61%	45%	48%	39%
Significant life plans have had to change	28%	36%	27%	32%	25%
I have had Coronavirus	17%	31%	20%	17%	12%
I or someone in my household is in a vulnerable group and I have been shielding at home	12%	9%	7%	8%	20%
I have been made unemployed	6%	12%	6%	8%	4%
The main income earner in my household has been made unemployed	6%	9%	8%	5%	4%
I am on a job retention scheme	3%	4%	4%	4%	1%

Red / Blue: Statistically significantly higher / lower than all semi-annual wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

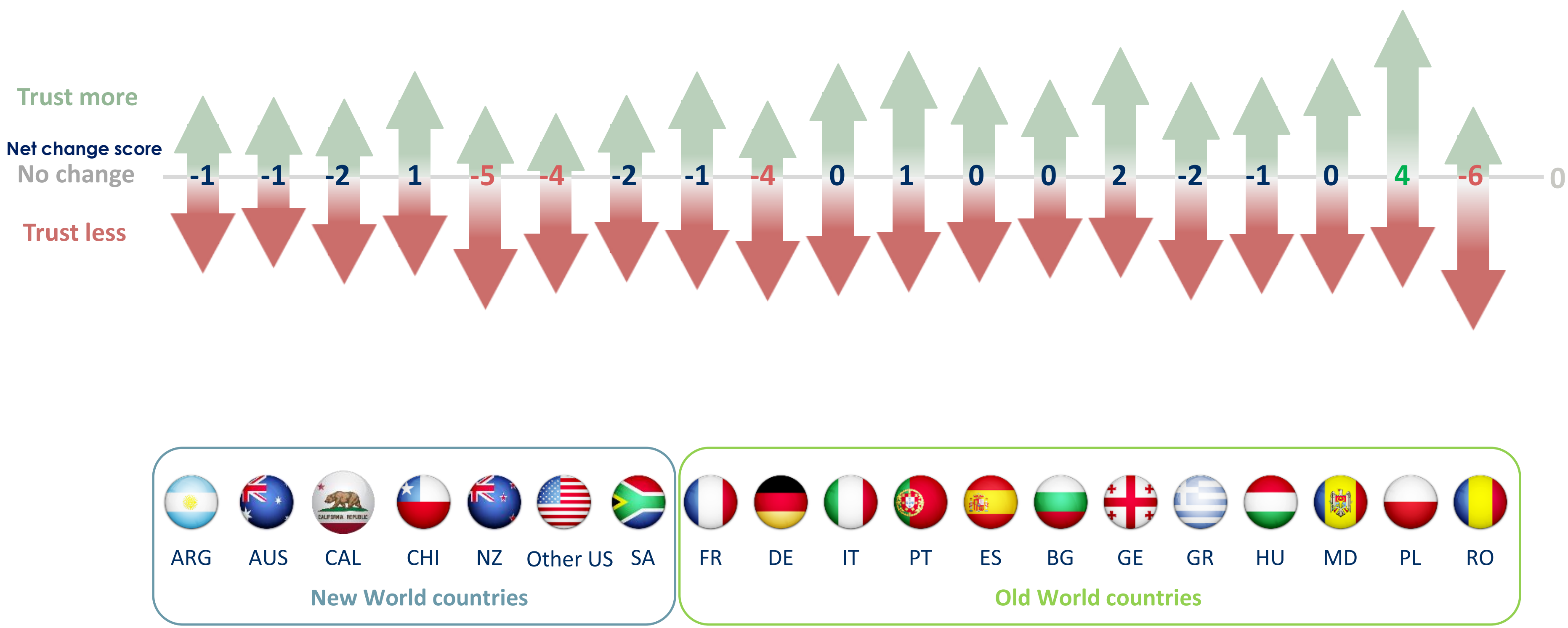
EXAMPLE SLIDE: COUNTRY OF ORIGIN: CHANGE IN TRUST

Polish wine consumers' trust levels have remain mostly stable with the exception of New Zealand, Germany, the US and Romania ,]which have experienced a small decline, while domestically produced wine has seen a small boost in confidence

Change in trust of wine origins during June 2021 compared with pre-pandemic behaviour

Base = Those who have heard of each wine-producing place

Net change score = % consumers who trust wine from this country more than they used to minus % consumers who trust wine from this country less than they used to



Green / red: Net change score of above 3 / below 3

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE

- The data was collected in Poland since March 2015
- The following waves March 2015, August 2018, July 2018 and January 2020 were tracked against June 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 Polish semi-annual wine drinkers in terms of age and gender
- The distribution of the sample is shown in the table:

			Mar-15	*Aug-18 + Jul-18*	*Jan-20*	*Jun-21*
		n=	*1,003*	*2,000*	*1,000*	*1,001*
Gender	Male		43%	42%	46%	46%
	Female		57%	58%	54%	54%
	Total		*100%*	*100%*	*100%*	*100%*
Age	18-24		17%	14%	8%	8%
	25-34		25%	25%	21%	21%
	35-44		19%	19%	20%	20%
	45-54		18%	18%	16%	16%
	55-64		15%	15%	16%	16%
	65 and over		6%	10%	18%	18%
	Total		*100%*	*100%*	*100%*	*100%*

Source: Wine Intelligence, Vinitrac® Poland, March 2015 - June 2021 (n ≥ 1,000) Polish semi-annual wine drinkers

RESEARCH METHODOLOGY: QUALITITATIVE

TRADE INTERVIEWEES

Trade Interviews were conducted with five 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 Market Researcher

1 x Sommelier Association President

1 x Wine PR Agency Director

1 x Wine Writer

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Wine Intelligence London (Head Office)

Nutmeg House
60 Gainsford Street
London
SE1 2NY

Telephone: +44 (0) 20 8194 0090
Email: enquiries@wineintelligence.com
Website: www.wineintelligence.com
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