WINE INTELLIGENCE

DENMARK WINE LANDSCAPES

NOVEMBER 2021

REPORT BROCHURE

PRICING

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INTRODUCTION

Since our previous Denmark Landscapes report in 2019, the Danish wine market has lost an estimated 17% of its monthly wine drinkers even though the adult population of the country has increased during this time. This could be the effect of moderation, especially amongst younger drinkers, but also competition from other categories such as RTDs.

In terms of the pandemic, Denmark has effectively navigated the situation compared to some of its neighbours thanks to fewer restrictions and an effective vaccination programme. However, after being the first European Union country to remove their Covid-19-related restrictions, rising case numbers have lead to calls for reintroducing measures to ease pressure on the healthcare system. This could lead to restrictions returning for the on-trade which would limit potential and short-term recovery.

Adding to this there is uncertainty amongst younger consumers about their approach to the post-Covid world, especially around their future drinking plans. Four in ten 18-34–year-old monthly wine drinkers anticipate increasing their alcohol consumption, with 23% saying they'll decrease it; suggesting a repertoire reset is taking place amongst them as the pandemic recedes.

German wine, however, seems to be a beneficiary of the pandemic. The country's consumption level has risen significantly since 2017 in Denmark whilst consumption of other origins has declined. We could attribute this to increased accessibility, distribution, and marketing efforts throughout the pandemic, as borders were shut and importing from other origins was limited. Furthermore, the markets' proximity to each other means supply of German wine faced less disruption in the past year compared with sources further away from Denmark. With the ability for Danes to once again cross into Germany to purchase less heavily-taxed alcohol and wine, we could expect this trend to continue within the market.

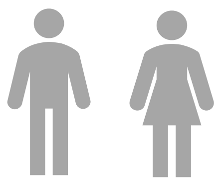
Supermarkets have also been affected by Covid-19, having lost trade since 2018 as consumers migrated to buying their wine online. Pandemic restrictions such as limitations on the number of people in stores or general hesitations to leave home are likely responsible. However, trade interviewees suggest that supermarkets will bounce back once consumers return to their pre-pandemic behaviours.

Additionally, in terms of shopping attitudes, Danish wine consumers have become increasingly more price-conscious since 2018; they place greater importance on promotional offers when buying wine and have begun to perceive it as an expensive drink. This is in contrast with other markets such as the UK where British regular wine drinkers are showing a propensity to spend more per bottle in both the off- and on-trades, leading to premiumisation of wine that isn't seen as obviously in the Danish market.

EXAMPLE SLIDE: DEMOGRAPHICS OF DENMARK WINE REGULAR WINE DRINKERS

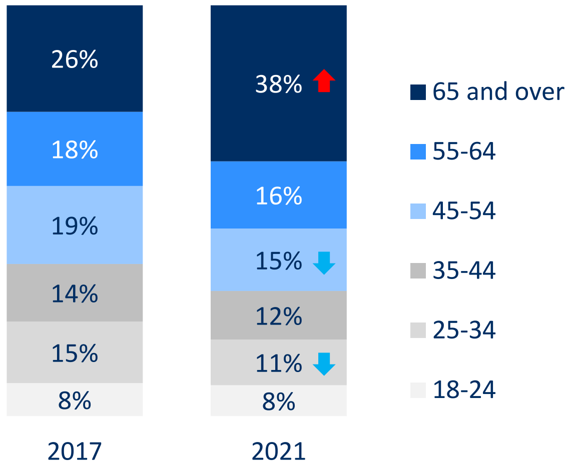
Danish wine consumers skew older (65+), more affluent (800.000kr.+) and more live in the Hovedstaden region (encompassing Copenhagen) compared with 2017

Gender



2021	51%	49%
2017	53%	47%

Age



Regions

	2017	2021	
Hovedstaden	25%	31%	↑
Midtjylland	20%	22%	
Nordjylland	10%	11%	
Sjælland	19%	16%	
Syddanmark	25%	19%	↓

Total household income (before tax)

	2017	2021	
Under 100.000 kr.	3%	2%	
100.000kr.	4%	4%	
150.000kr.	6%	6%	
200.000kr.	14%	14%	
300.000kr.	16%	17%	
400.000kr.	13%	12%	
500.000kr.	9%	9%	
600.000kr.	7%	7%	
700.000kr.	8%	6%	
800.000 kr. +	7%	11%	↑
Prefer not to answer	14%	12%	

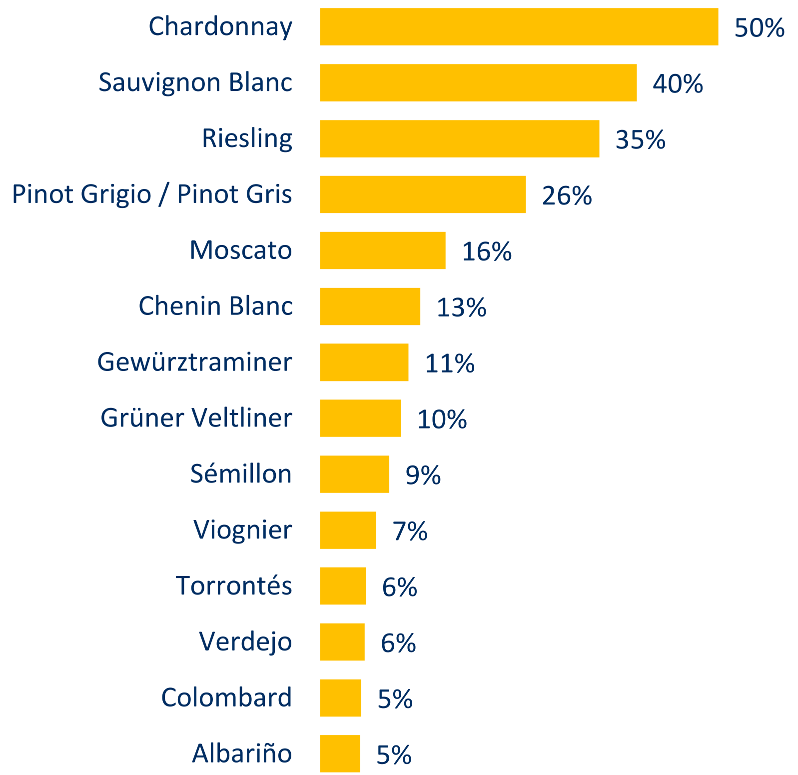
↑ / ↓ : Statistically significantly higher / lower than the 2017 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2021, (n=1,000), Danish regular wine drinkers

EXAMPLE SLIDE: VARIETAL CONSUMPTION

Popular international varietals Chardonnay and Cabernet Sauvignon are the most consumed varietals for white and red wine respectively

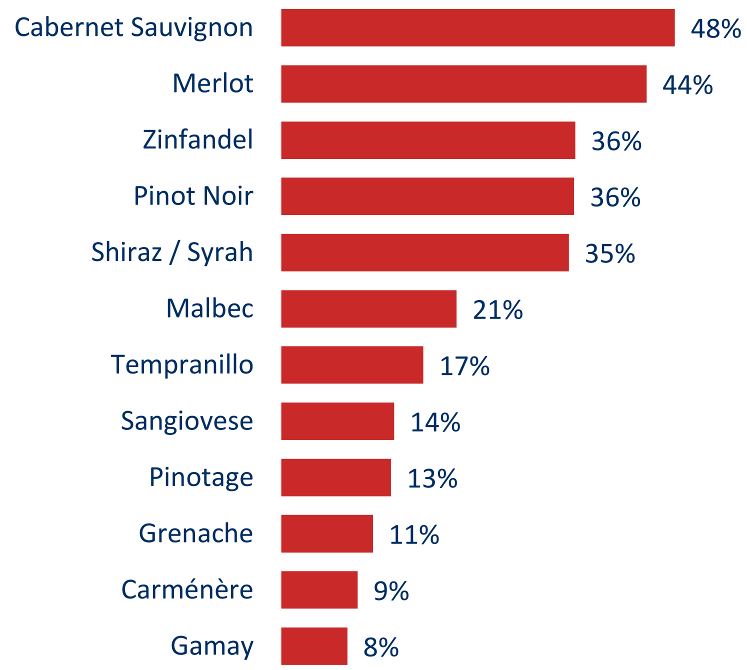
White varietal consumption

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



Red varietal consumption

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



Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

EXAMPLE SLIDE: WINE PURCHASE IN THE ON-TRADE

Recalled purchase incidence in the on-trade has largely regained its 2018 levels, despite the effects of Covid-19

Wine purchase in on-trade locations: Tracking

% who buy wine in a bar, pub or restaurant
Base = All Danish regular wine drinkers (n=1,000)

On-trade location	2017	2018	2021	Tracking	
n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
Bar	51%	46%	47%	➡	➡
Restaurant	89%	86%	85%	⬇	➡

Wine purchase in on-trade locations by age

% who buy wine in a bar, pub or restaurant
Base = All Danish regular wine drinkers (n=1,000)

On-trade location	All Danish regular wine drinkers	Age groups: 18-34	35-54	55+
n=	*1,000*	*186*	*270*	*544*
Bar	47%	64%	59%	36%
Restaurant	85%	86%	79%	88%

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®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

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