



A division of the IWSR Group

Wine E-commerce

2022



PRICING

Report Price:

GBP 8,000
AUD 16,000
EUR 9,600
USD 11,200

Report length:
146
pages

Options to pay online or via invoice

Please contact enquiries@wineintelligence.com to find out more.

Contents

03

**Wine
Intelligence
Viewpoint**

04

**Management
Summary**

14

**Global
Overview**

29

**Market Focus:
Australia**

46

**Market Focus:
Brazil**

63

**Market Focus:
China**

80

**Market Focus:
Germany**

87

**Market Focus:
UK**

114

**Market Focus:
US**

131

**Research
Methodology**

Wine Intelligence Viewpoint

Wine e-commerce remains a growing and increasingly valuable channel

The market is developing into two separate spheres: impulse purchases for immediate consumption, led by apps, where speed matters more and cost matters less; and ‘traditional’ web browser e-commerce, which is driven by offers and perceived range

Alcohol e-commerce volumes and value are forecast to continue to grow post-pandemic.

Wine is well-placed within this world, over-indexing in online volumes compared to the total trade. There is a strong investment case for wine to expand its reach and market share in this channel.

The audience among wine drinkers also continues to expand despite the fading of the Covid pandemic and associated lockdowns, though the rapid growth of the Covid era appears to be subsiding.

Online wine shoppers are more likely to be younger, higher income and urban and be more frequent wine drinkers. They are also likely to spend more. Strategically these are the most desirable consumers that wine producers can target in the current trading environment.

Websites are used for more purchases than apps, with the exception of China and Brazil, but apps have a larger audience among younger consumers. Apps promote smaller volume, more frequent purchases, for consumption then and there, often in smaller quantities but with a higher value per bottle.

There are opportunities for growth, with significant proportions of non-online wine shoppers considering using online channels in the future.

However wine e-commerce strategies need to take into account the fundamental change in the e-commerce offer and use case, particularly for app users.

Traditional e-commerce is still focused on offers and perceived range, with promotions and hard-to-find products driving channel choice.

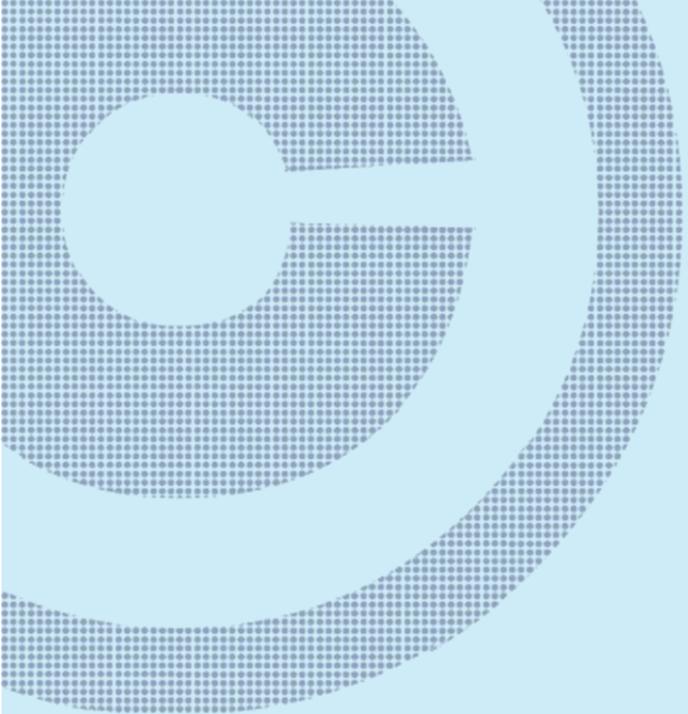
However, the return of the on-premise, growing competition from RTDs and inflation all pose threats to wine e-commerce.

Opportunities

- Growth in app-based e-commerce
- Premiumisation and ‘indulgence’ purchases
- Specialist channels

Threats

- Inflation and cost of living
- Return of on-premise
- Switching to lower cost B&M retail
- Growing competition from other alcohol categories



Copyright Wine Intelligence 2022

All rights reserved. No part of this publication may be reproduced in any form (including photocopying or storing it in any medium by electronic means) without the permission of the copyright owners. Application for permission should be addressed to Wine Intelligence.

The source of all information in this publication is Wine Intelligence unless otherwise stated.

Wine Intelligence shall not be liable for any damages (including without limitation, damages for loss of business or loss of profits) arising in contract, tort or otherwise from this publication or any information contained in it, or from any action or decision taken as a result of reading this publication.

Please refer to the Wine Intelligence Terms and Conditions for Syndicated Research Reports for details about the licensing of this report, and the use to which it can be put by licensees.

Wine Intelligence Ltd: Nutmeg House, 60 Gainsford Street, London SE1 2NY
Tel: 020 8194 0090. E-mail: info@wineintelligence.com
Registered in England as a limited company number: 4375306



A division of the IWSR Group

Wine Intelligence London (Head Office)

Nutmeg House
60 Gainsford Street
London
SE1 2NY

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

Follow us:   