ProWein

Internationale Fachmesse
Weine und Spirituosen

Hochschule Geisenheim University

PROWEIN BUSINESS REPORT 2018

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Geisenheim University, Institute of Wine and Beverage Business Research

Background

Internationale Fachmesse
Weine und Spirituosen

What is the aim of the ProWein Business Report?

The wine industry undergoes continuous internationalisation and the global landscape of wine markets changes. Traditional markets decrease in importance and new markets become interesting for wine exporters.

- Which are currently the most attractive wine markets in the world?
- Which markets will increase or decrease in importance by 2021 and what is the risk associated with this development?
- What are currently the most sought after country of origins?

The ProWein Business report taps into the knowledge of international wine producers, intermediaries, and wine marketers to answer these question. By combining and contrasting opinions both from the complete value chain it provides a unique economic market barometer.

ProWein and Geisenheim University will form a long-term collaboration to provide the wine industry with annual insights on global wine market trends.

ProWein

Starting in 1994 with 321 exhibitors and approx. 1,500 visitors, ProWein has developed into what is the leading trade fair for the international wine and spirits industry today. At its latest edition in March 2018 to the tune of 6,800 exhibitors from 64 countries met in Düsseldorf with over 60,000 trade visitors from throughout the world. Since 2013 ProWine China has been held yearly in Shanghai and from April 2016 the ProWein family of events extended to include ProWine Asia, alternating between Hong Kong (2019) and Singapore (2020).

Geisenheim University

Founded in 1872 as a state research institute Geisenheim University today is one of the leading wine research and education centres in the world. It hosts more than 1,350 students studying various German and English bachelor and master degrees in viticulture and enology, international wine business and beverage technology among others. Applied and fundamental research is at the heart of Geisenheim's research activities. Following a multi-disciplinary approach research in Geisenheim involves the whole supply chain from grape breeding to wine marketing. Geisenheim is well known for its extensive global research network and international collaborations.

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Chapter 1

Who Participated?

Globally most comprehensive trend barometer of the international wine industry

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More than 2,300 experts shared their opinion

- Commissioned by ProWein for the second time, the Geisenheim University has again surveyed more than 2,300 experts in the wine industry from 46 countries on international wine markets, marketing trends, developments in online wine sales and the economic situation.
- The survey conducted in mid-2018 was once more met with strong interest in the industry. Since the first survey in 2017 the number of participants increased by 60% from 1,487 to 2,364.
- This makes the ProWein Business Report the globally most comprehensive trend barometer of the international wine industry.

Participants

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Online survey (n=2,364)
May 2018; 5 languages

Producers (n=576)

- **Small wineries** (n=342) (mainly use own grapes)
- **Cooperatives** (n=74)
- **Large wineries** (n=160) (mainly buy grapes or bulk wine)

Intermediaries (n=762)

- **Exporters** (n=120)
- **Importers, Distributors** (n=642)

Retailers (n=1.026)

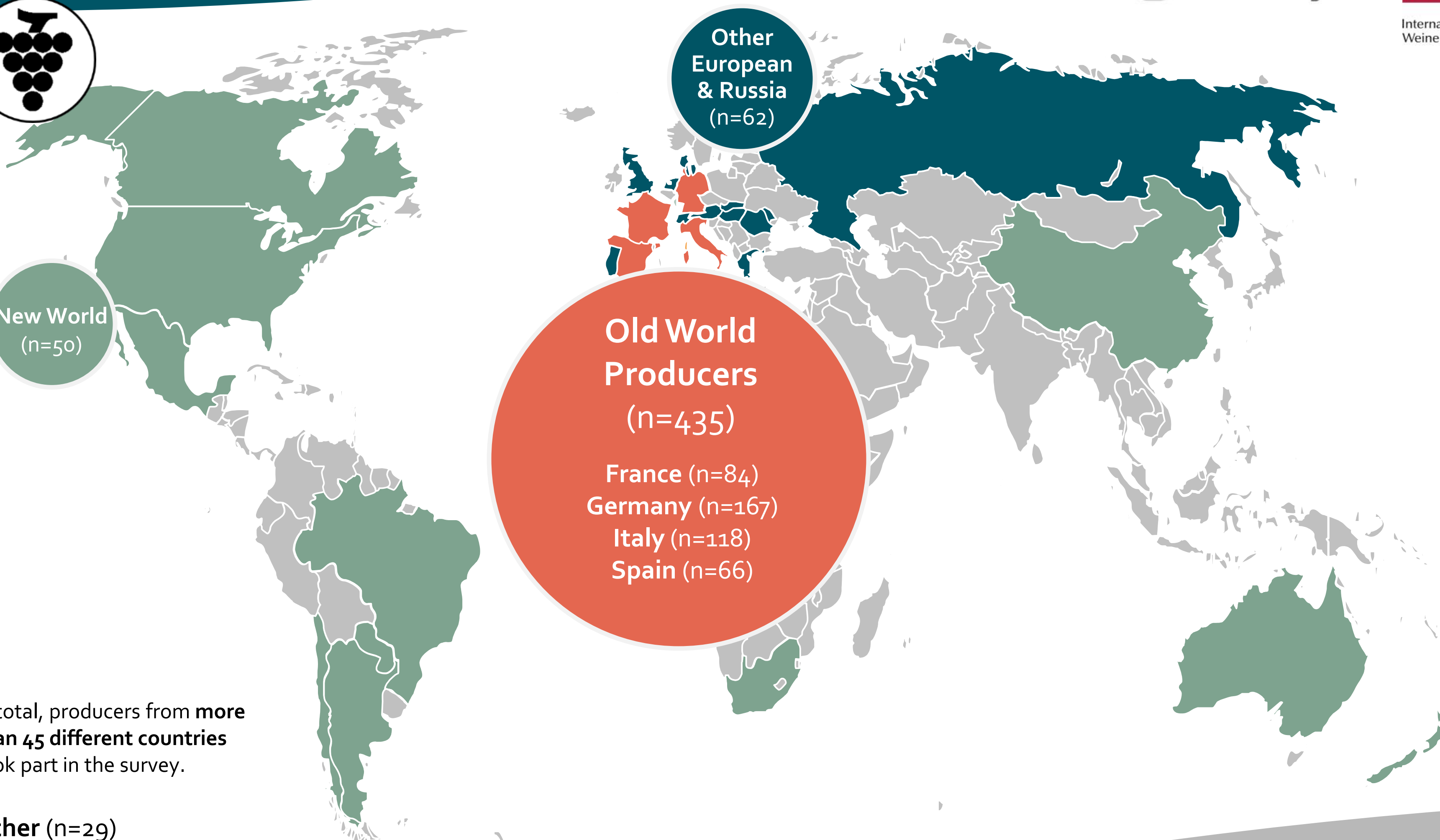
- **Wholesalers** (n=188)
- **Specialty retail** (n=481)
- **On-trade** (n=357)

Focus on export markets

Focus on wine origins

For detailed information on methodology and participants, please see chapter 7.

Company location
Producers

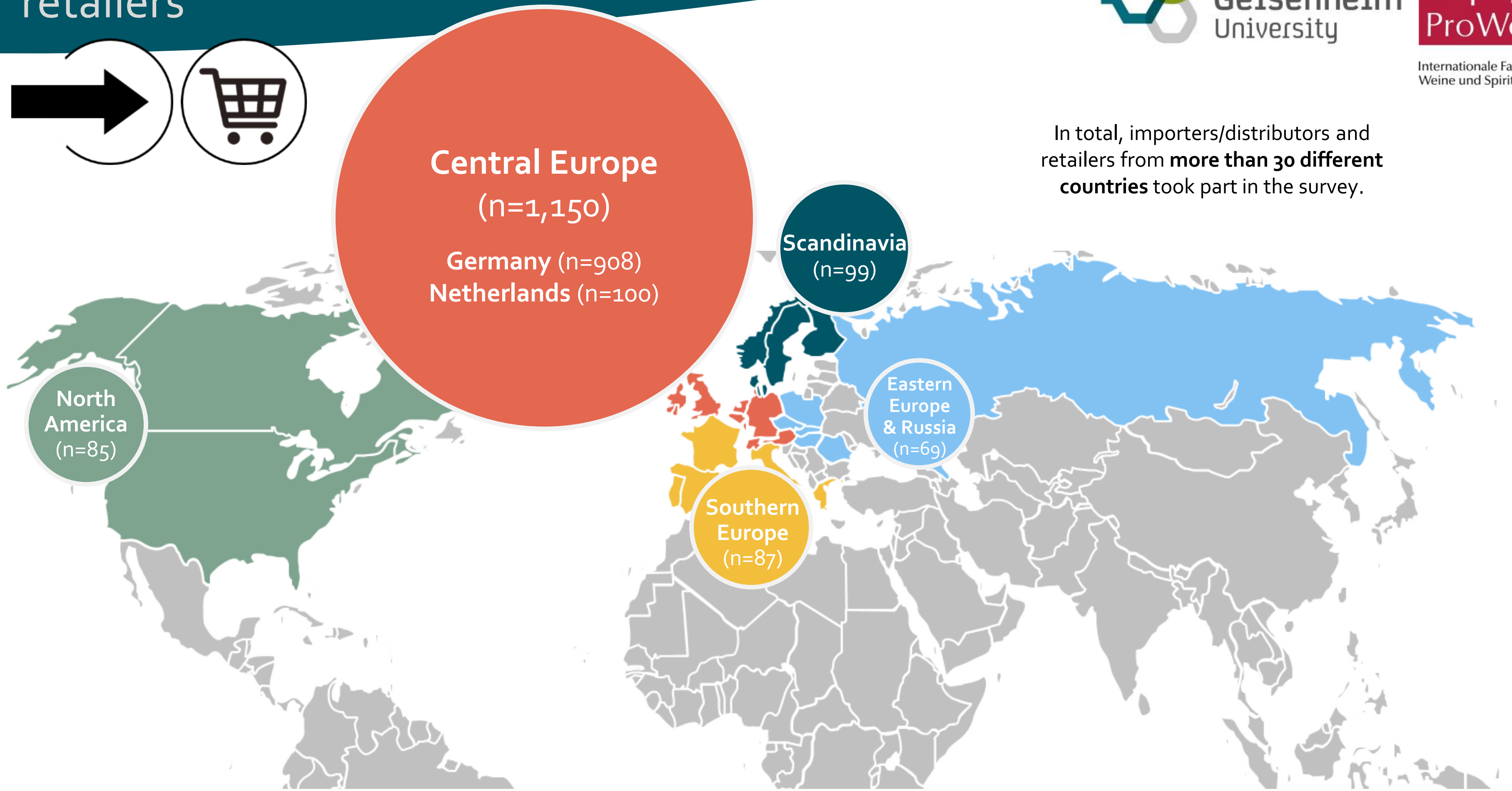


In total, producers from **more than 45 different countries** took part in the survey.

Other (n=29)

Company location Importers/distributors & retailers

In total, importers/distributors and retailers from **more than 30 different countries** took part in the survey.



Other (n=168)

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Chapter 2

SALES MARKETS ATTRACTIVENESS

Key findings – sales markets attractiveness

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China became the globally most attractive export market

- Wine exporters assess China as the most attractive wine market followed by Japan, Hong Kong and Scandinavia. This is the first time that China ranks number one.

Russia, China and Brazil improved strongest in attractiveness compared to 2017

- Compared to the first survey in 2017 the emerging and growing wine markets Russia, China and Brazil (BRIC without India) improved strongest in attractiveness. This agrees with findings from the 2017 ProWein Business Report, where strong improvements were expected for these markets.
- From the traditional and established wine markets Italy and France rose in market attractiveness between 2017 and 2018
- The Netherlands, South Korea and Switzerland slightly decreased in market attractiveness compared to 2017

China is expected to most strongly increase in attractiveness by 2021

- Markets with strongest expected increase in attractiveness are China, South Korea, Poland, Russia and Hong Kong. The countries are similar to results from 2017 but China stepped forward and now leads the group of future promising markets.

Changes in future attractiveness come with risk

- Overall Asian and BRIC markets have high future prospects but are also associated with higher market risks
- Risk perception did not change much since 2017

.

UK is the wine market with the weakest current and future attractiveness

- Compared to 2017 the UK further decreased in attractiveness and deteriorated in risk perception
- Several factors are related to the UK's weak position. The steadily increasing alcohol tax and the ongoing reduction of shelf space for wine make the market continuously difficult for producers. The uncertainties of the imminent BREXIT have certainly contributed to the current deterioration in market assessment.

Majority of producers plan to develop and unlock new export markets

- Overall 8 out of 10 producers plan to expand their export activities to new markets within the next 3 years, unchanged from 2017
- Domestic markets of the major wine producers are mature without further growth expectations. Export therefore is a very important sales channel for wine producers.

Current market attractiveness 2018
Top 7

Current market attractiveness of specific markets

Mean value, how the current economic attractiveness of the following markets is assessed (from -2 = very unattractive to 2= very attractive)

Base: All producers and exporters, which either currently distribute wine or plan to distribute wine to the following markets by 2021

Rank	2018
1	China (1.08)
2	Japan (1.00)
3	Hong Kong (0.97)
4	Scandinavia (0.95)
5	USA (0.95)
6	Canada (0.94)
7	Australia (0.87)

- China became the globally most attractive export market in 2018
- China is followed by Japan, Hong Kong and Scandinavia. This is the first time that China ranks number one.

Current export market attractiveness
Top 7

Current market attractiveness of specific markets

Mean value, how the current economic attractiveness of the following markets is assessed
(from -2 = very unattractive to 2= very attractive)

Base: All producers and exporters, which either currently distribute wine or plan to distribute wine to the following markets by 2021

Rank	2017	2018
1	Hong Kong (1.03)	China (1.08)
2	Switzerland (1.03)	Japan (1.00)
3	South Korea (1.02)	Hong Kong (0.97)
4	USA (0.98)	Scandinavia (0.95)
5	Scandinavia (0.96)	USA (0.95)
6	Japan (0.95)	Canada (0.94)
7	Poland (0.93)	Australia (0.87)

Current Market attractiveness 2017 vs. 2018
Winners & loosers

Rank 2018	Top 5 winners
1	Italy
2	Russia
3	France
4	China
5	Brazil

Rank 2018	Top 3 loosers
1	Netherlands
2	South Korea
3	Switzerland

- From the traditional and established wine markets Italy and France rose in market attractiveness between 2017 and 2018
- Compared to the first survey in 2017 the emerging and growing wine markets Russia, China and Brazil (BRIC without India) improved strongest in attractiveness. This agrees with findings from the 2017 ProWein Business Report, where strong improvements were expected for these markets.
- The Netherlands, South Korea and Switzerland slightly decreased in market attractiveness compared to 2017

Current Market attractiveness 2017 vs. 2018

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Current market attractiveness of specific markets

Mean value, how the current economic attractiveness of the following markets is assessed
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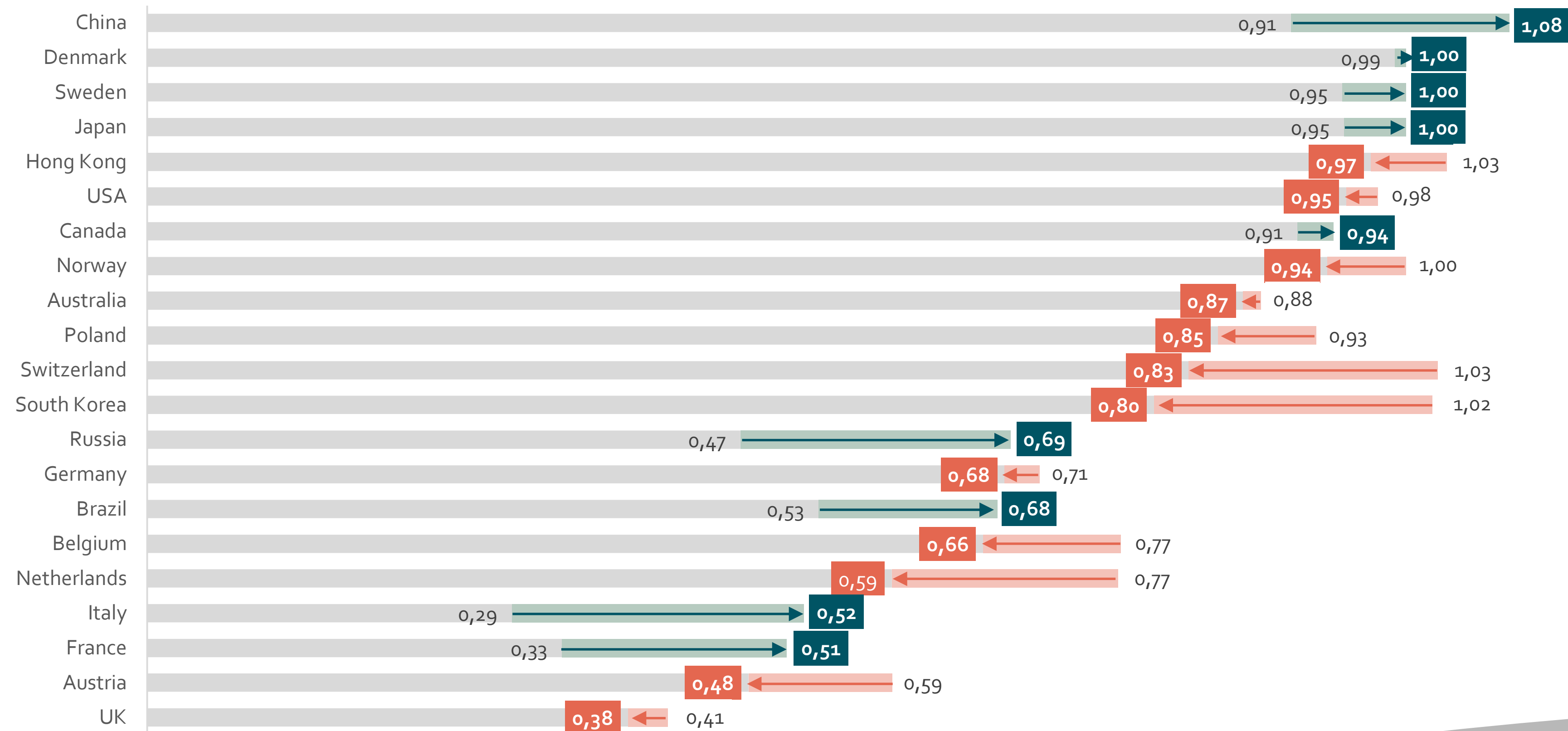
Base: All producers and exporters, which either currently distribute wine or plan to distribute wine to the following markets by 2021



Expected change in economic attractiveness

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Which countries will further increase in attractiveness?

Mean value, how the development of the economic attractiveness of the following markets is assessed (from -2 = very negatively to 2= very positively)

Base: All producers and exporters, which either currently distribute wine or plan to distribute wine to the following markets by 2021

Rank	Strongest expected increase in attractiveness
1	China (0.91)
2	South Korea (0.90)
3	Poland (0.86)
4	Russia (0.76)
5	Hong Kong (0.72)
6	Japan (0.65)
7	Australia (0.65)

Rank	Lowest expected increase in attractiveness
1	UK (-0.05)
2	France (0.19)
3	Italy (0.26)

- Markets with strongest expected increase in attractiveness are China, South Korea, Poland, Russia and Hong Kong.
- The expected change in economic attractiveness is similar to results from 2017 but China stepped forward and now leads the group of future promising markets.
- Overall Asian and BRIC markets have high future prospects but are also associated with higher market risks

Current and future attractiveness 2018

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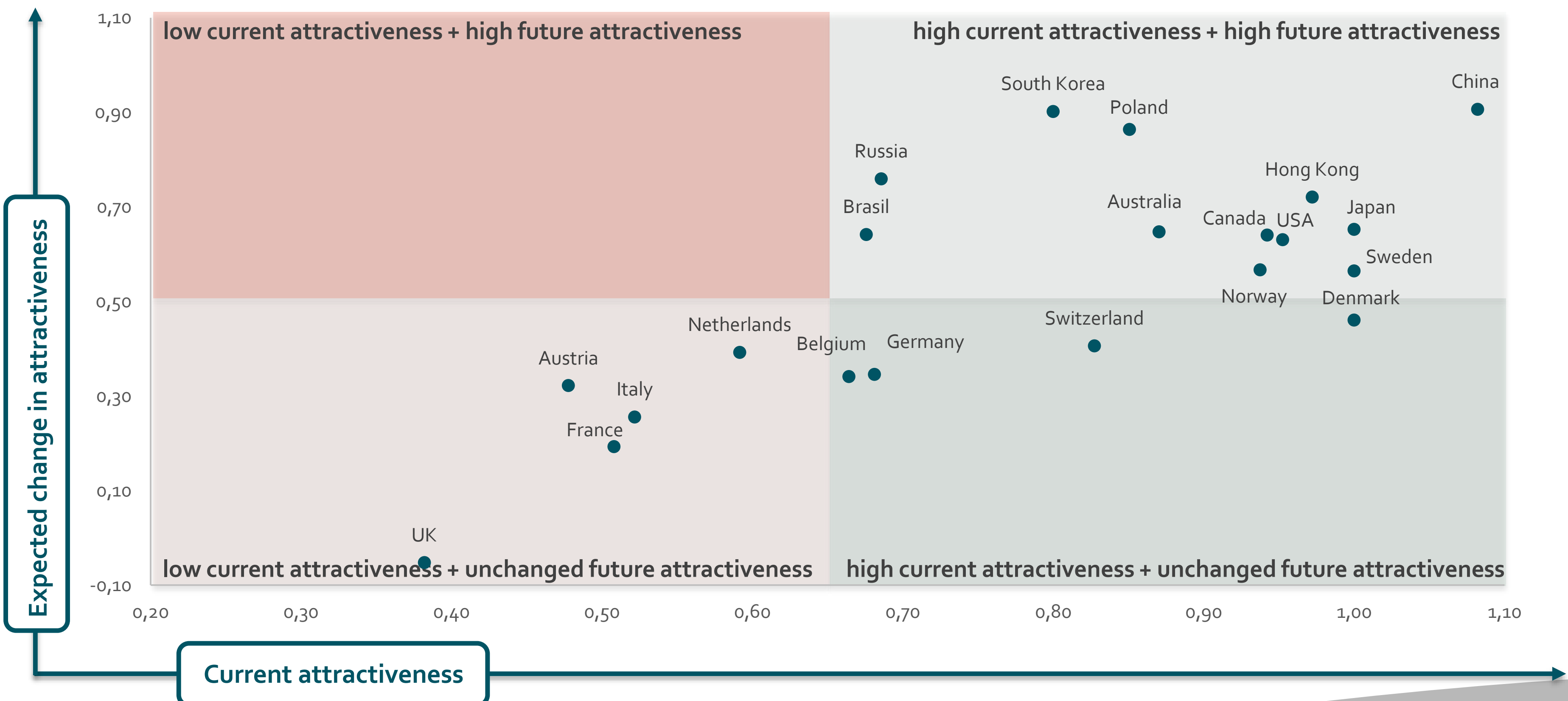
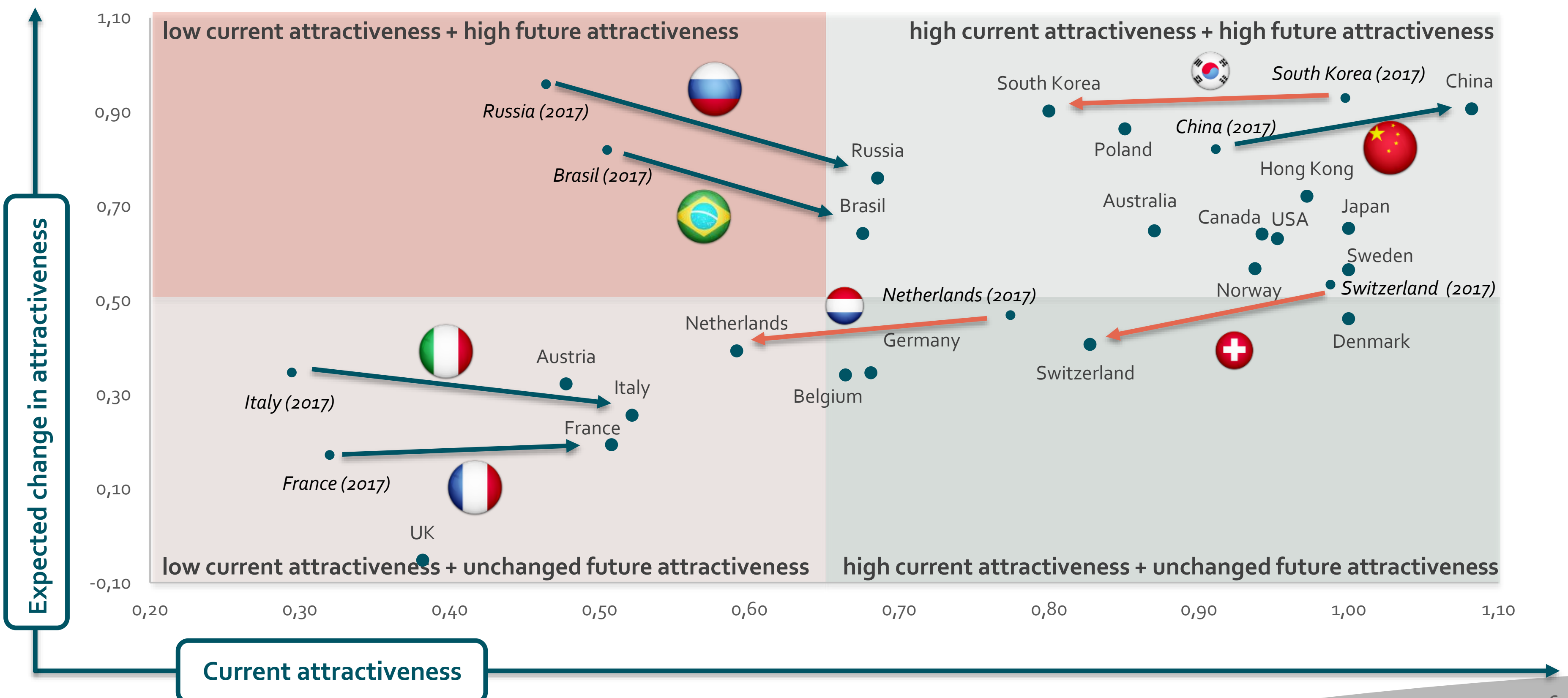
Current market attractiveness vs. expected change in market attractiveness



Current and future attractiveness
Changes since 2017

Current market attractiveness vs. expected change in market attractiveness



Risk of economic development

How do you assess the risk of market development by 2021?

Mean value, how the development of the risk of economic development of the following markets is assessed (from -2 = very negatively to 2= very positively)

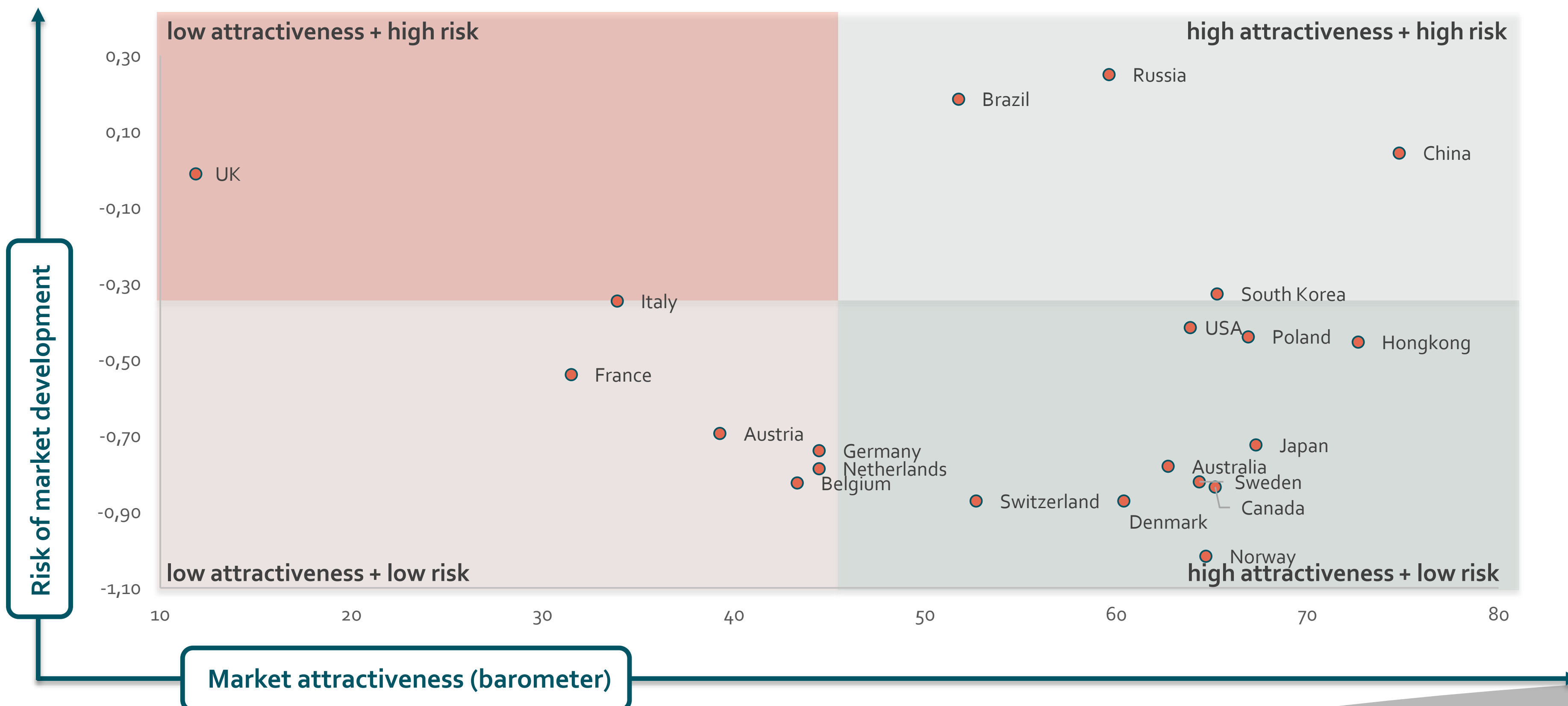
Base: All producers and exporters, which either currently distribute wine or plan to distribute wine to the following markets by 2021

Rank	Risk perceoption
1	Russia (0.25)
2	Brasil (0.19)
3	China (0.04)
4	UK (-0.01)
5	South Korea (-0.33)
6	Italy (-0.35)
7	USA (-0.41)

- Risk perception did only marginally change from 2017
- The BRIC countries Russia, Brasil and China are associated with highest risk followed by the UK and South Korea

Risk and market attractiveness 2018

Market attractiveness (barometer) vs. risk of market development

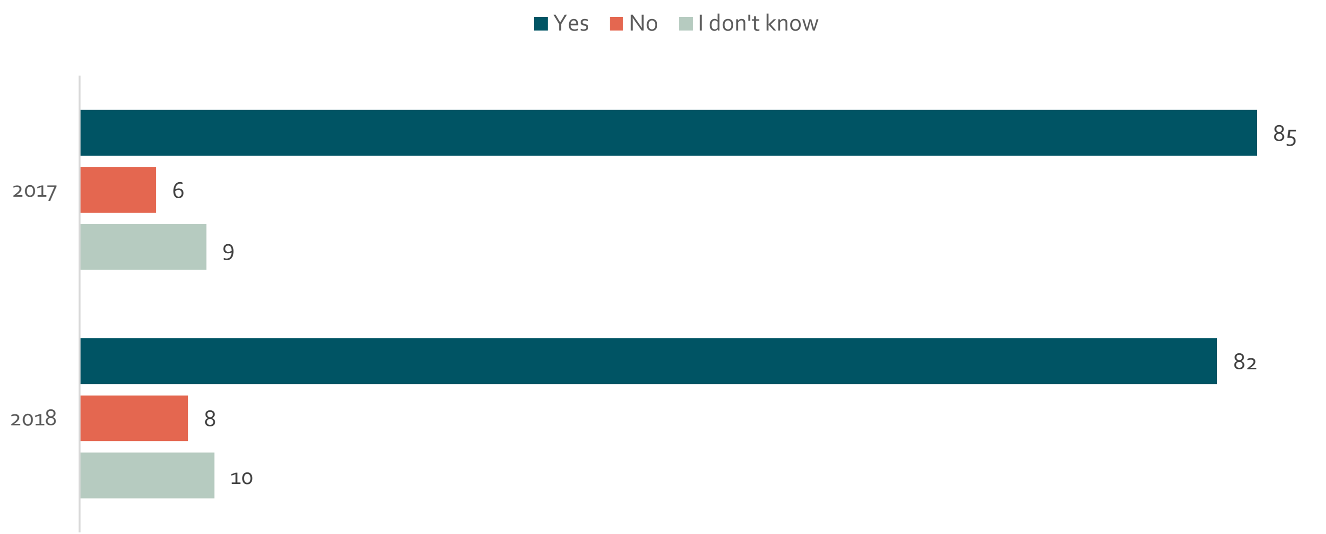


Export expansion to new markets

Expansion in export activities

% plan to expand their export activities to new markets within the next 3 years

Base: All producers and exporters



- Intention to expand wine exports to new markets is mainly unchanged on a very high level and only decreased marginally.
- Most companies plan to expand their export activities to new markets within the next 3 years.

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Chapter 3

New Emerging Sales Markets

Key findings – New emerging sales markets

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Singapore is the number one new emerging wine market

- Producers were asked about the potential of emerging wine markets in the next five years by 2023.
- Highest potential is seen for Singapore, Czech Republic and Taiwan, all of them are small and economically highly devolved markets.

United Arab Emirates ranks fourth in new emerging markets

- The United Arab Emirates surprisingly rank number four ahead of Vietnam, India, Thailand, Malaysia, Philippines, and Indonesia. This shows the increasing importance of food and wine in this tourist hub and expatriate location.

India important to new world producers

- India is ranked as number one new emerging market by New World wine producers from Australia, the US, South Africa etc. This might be related to stronger cultural similarities through the Commonwealth heritage and language similarities.

Emerging markets

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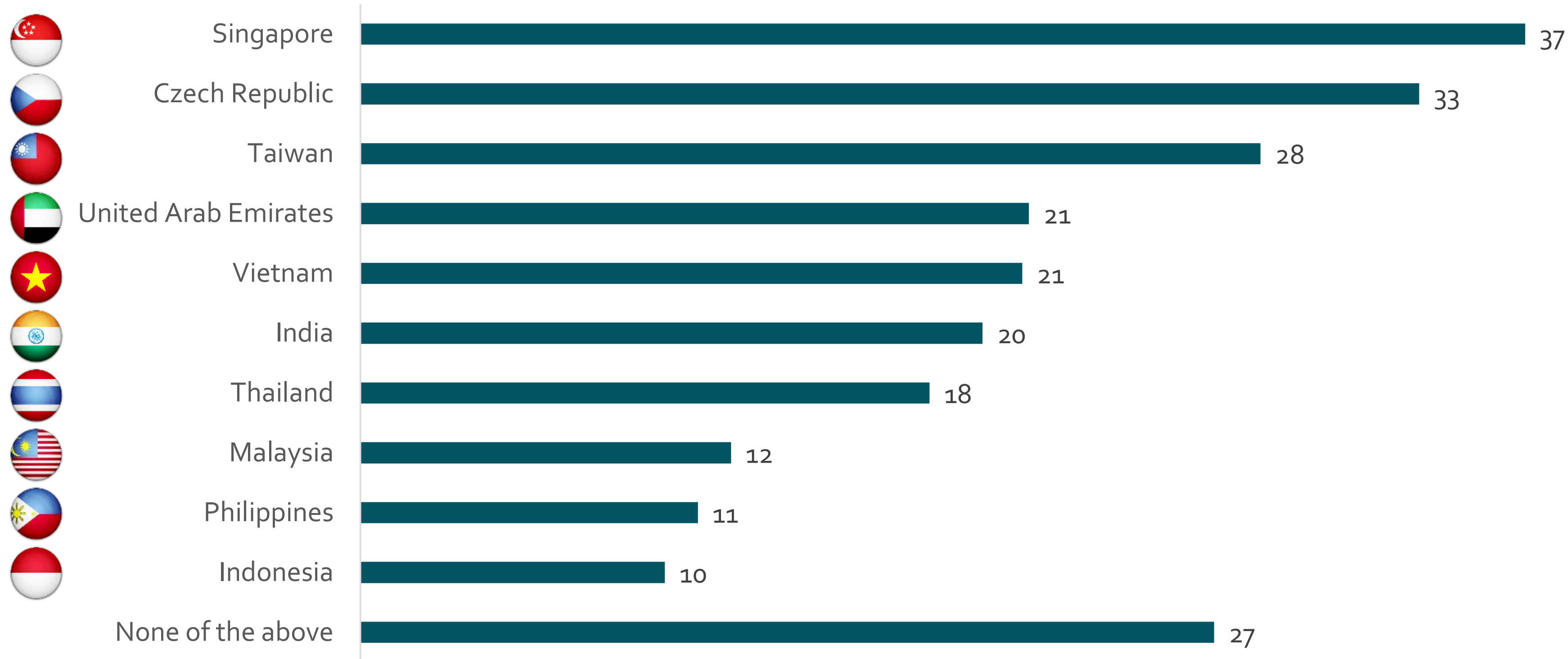
Emerging markets

% see potential in the following export countries for their company within the next 5 years

Base: All producers and exporters



Emerging markets by producer origin

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Emerging markets

% see potential in the following export countries for their company within the next 5 years

Base: All producers and exporters

Rank	France	Italy	Spain
1	Singapore (49%)	Singapore (51%)	Singapore (45%)
2	Taiwan (41%)	Taiwan (42%)	Czech Republic (44%)
3	Czech Republic (37%)	Czech Republic (35%)	Taiwan (38%)

Rank	New World	Other Europe	Germany
1	India (43%)	Czech Republic (41%)	Czech Republic (18%)
2	Taiwan (36%)	Singapore (25%)	Singapore (17%)
3	Singapore & Vietnam (32%)	United Arab Emirates (20%)	India & United Arab Emirates (11%)

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Chapter 4

SOUGHT AFTER WINE ORIGINS

Key findings – sought after wine origins

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There is an unbroken interest of wine retailers to take on new wine origins

- Almost every second retailer plans to expand his wine range by new countries of origin.
- There is strong potential for niche origins to enter portfolios of specialty wine retailers and gastronomy.

Portugal, South Africa and Argentina are the most sought after wine origins to expand retailer portfolios

- Portugal, South Africa and Argentina are most frequently stated when it comes to retailers' plans to expand their existing wine range by new countries of origin. These origins complement or replace retailers' existing selection led by Italy, France, Spain, Germany and Australia.

Markets strongly differ in the sought after new wine origins

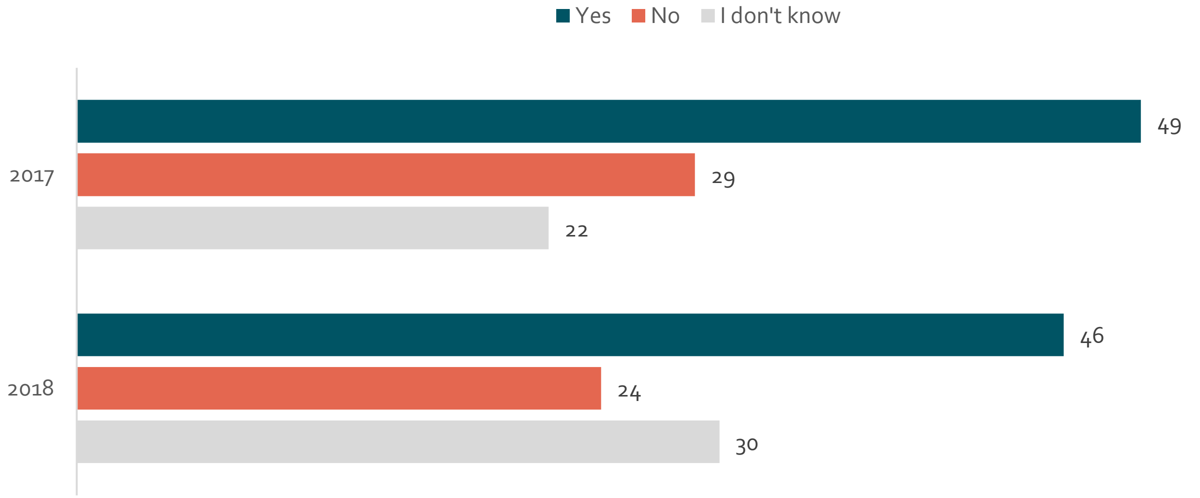
- Scandinavia countries: Spain, South Africa and Germany
- Central Europe: Portugal, South Africa and Slovenia lead the list. There is generally larger interest in East European origins than elsewhere.
- Eastern Europe: New Zealand, Germany and Australia
- Southern Europe: South Africa, Australia, USA
- North America: Spain, Chile and New Zealand

Willingness to expand wine range

Expansion of wine range to new countries of origin

% of marketers, which plan to expand their wine range to new countries of origin by 2021

Base: All importers/distributors and retailers



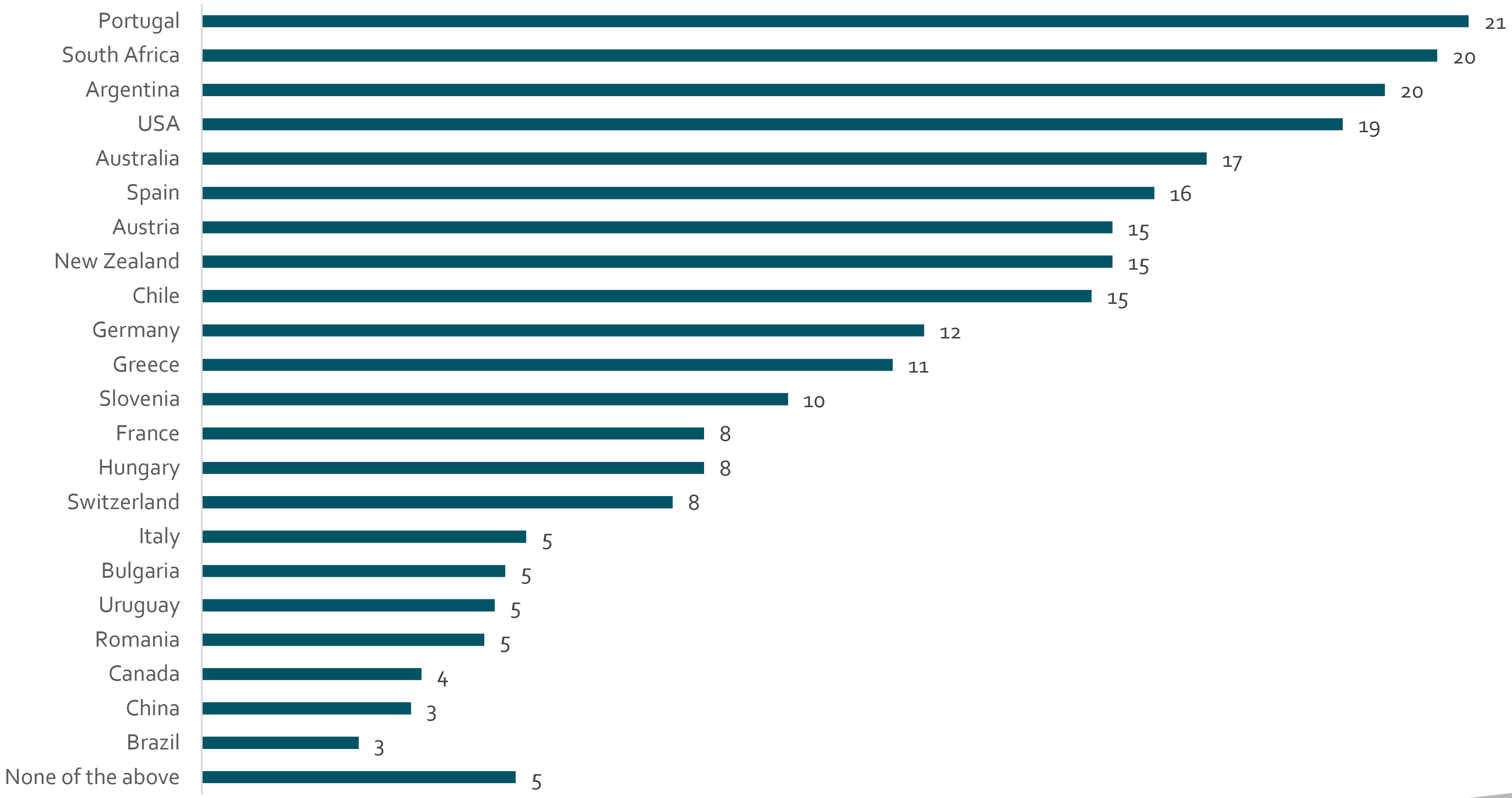
- About half of importers, distributors and retailers plan to expand their export activities to new markets within the next 3 years.
- Intention to expand wine range by new countries is mainly unchanged on a high level and only decreased marginally.

Sought after wine origins

Expansion of wine range to new countries of origin

% of marketers, which plan to expand their wine range to the following new countries of origin

Base: All importers/distributors and retailers, who plan to expand their wine range to new countries of origin by 2021



Expansion to new wine origins by location of retailer

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Expansion of wine range to new countries of origin

% of marketers, which plan to expand their wine range to the following new countries of origin

Base: All importers/distributors and retailers, who plan to expand their wine range to new countries of origin by 2021

Rank	Scandinavia	Central Europe	Germany
1	Spain (24%)	Portugal (23%)	Portugal (23%)
2	South Africa (22%)	South Africa (21%)	Argentina (21%)
3	Germany (20%)	Slovenia (17%)	South Africa (20%)

Rank	Eastern Europe	Southern Europe	North America
1	New Zealand (34%)	South Africa (29%)	Spain (30%)
2	Germany (34%)	Australia (26%)	Chile (27%)
3	Australia (32%)	USA (24%)	New Zealand (25%)

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Chapter 5

E-commerce

Key findings E-Commerce

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Online wine sales are unanimously expected to further increase by producers and retailers

- The share of wine producers and wine retailers running their own online shop is very similar at about 40% but the relative sales shares differ strongly. In average retailers sell more than a quarter online (28%) while producers only sell about 5% online.
- Every fifth producer sells his wine through online portals (e.g. Amazon and others)

Producers are too optimistic about a further increase of online sales by specialty wine retailers

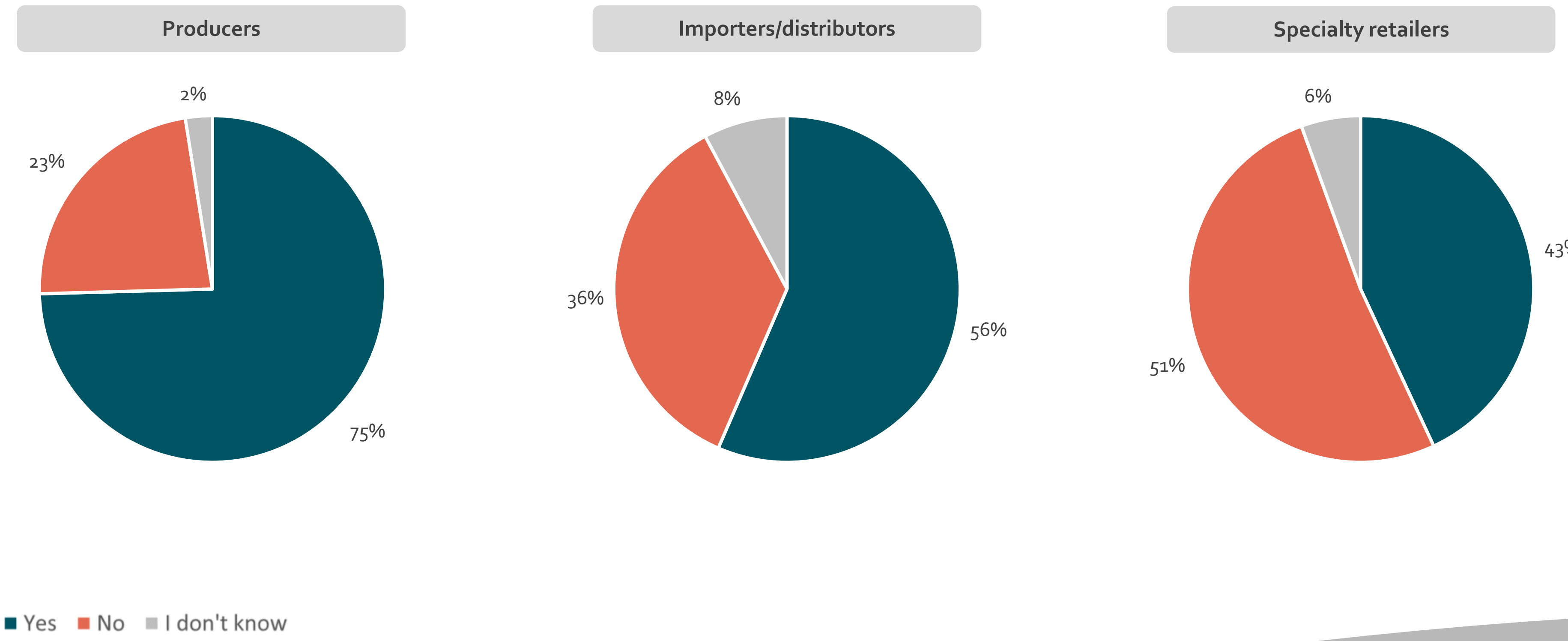
- Producers are more optimistic about the future increase of online sales by specialist wine retailers than those retailers themselves.
- Specialty retailers see considerably stronger pressure from transparency of prices and its negative impact on profits than producers are aware of.
- Specialty retailers perceive considerably stronger effort to run their own online shop compared to producers. Specialty retailers have to cater for larger portfolios and see higher costs of online marketing exceeding potential additional profits.

Use of online sales

Use of online sales

% state, that their wines are sold online

Base: Producers, importers/distributors and specialty retailers



Use of online sales - producers, wholesalers and specialty retailers

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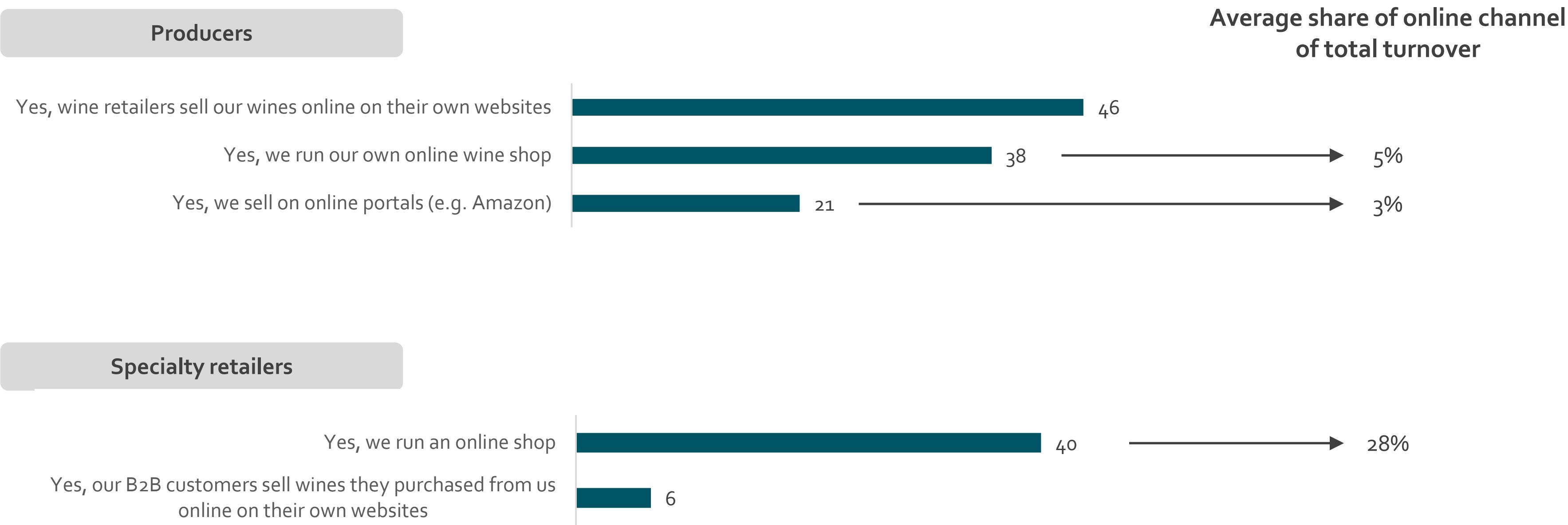
Use of online sales

% state, that their wines are sold online through the following channels

Base: Producers and specialty retailers who state that wheir wines are sold online



- The share of wine producers and wine retailers running their own online shop is very similar at about 40% but the relative sales shares differ strongly. In average retailers sell more than a quarter online (28%) while producers only sell about 5% online.
- Every fifth producer sells his wine through online portals (e.g. Amazon and others)

Development of online wine sales

How do you assess the future development of online wine sales?

% who assess the future development of online wine sales as follows

Base: Producers (n=387) and specialty retailers (n=478)

- Producers are more optimistic about the future increase of online sales by specialist wine retailers than those retailers themselves.
- Specialty retailers see considerably stronger pressure from transparency of prices and its negative impact on profits than producers are aware of.
- Specialty retailers perceive considerably stronger effort to run their own online shop compared to producers. Specialty retailers have to cater for larger portfolios and see higher costs of online marketing exceeding potential additional profits.

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Chapter 6

Economic Condition

Key findings – Economic condition

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There is an overall positive economic outlook of the wine industry

- Industry leaders are positive about the present and future economic condition.
- The majority of producers, exporters, importers and retailers have positive expectations for their economic development in 2019.

Differences between industry players

- Producers: large wineries are most optimistic, small wineries stable, cooperatives expect deterioration
- Distributers: both exporters and importers expect improvement of economic condition after a dip between 2017 and 2018.
- Retailers: actual economic conditions in 2018 turned out to be better than expected in 2017 for wholesale and on-trade. Expectations for 2019 are less optimistic again for both groups. Specialty retail largely stable.

Differences between producers depend on country of origin

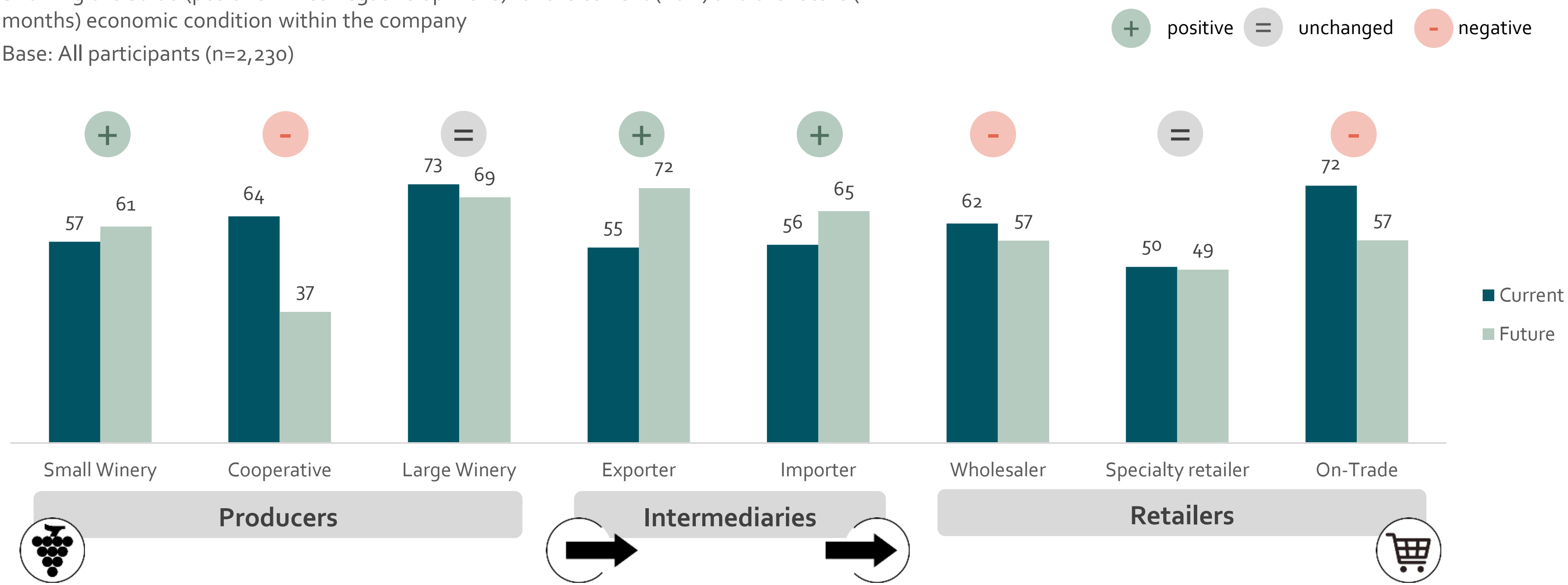
- Italian producers most positive for 2019, high expectations for 2018 were fulfilled
- Spanish producers high expectations for 2018 were undercut by small harvest, positive outlook for 2019
- French producers: moderately positive for 2019
- German producers: slightly negative development between 2017 and 2018 and less optimistic outlook for 2019 than other countries

Economic condition 2018
Overview

Current and future economic condition within the company

Showing the Saldo (positive minus negative opinions) for the current (now) and the future (in 12 months) economic condition within the company

Base: All participants (n=2,230)



The different players of the wine market generally report a positive economic condition of their company in 2018.

Producers: small wineries expect an improvement of economic conditions while cooperatives expect a deterioration for 2019.

Intermediaries: both exporters and importers expect an improvement for 2019.

Retail: Specialty retail expect unchanged conditions while wholesale and on-trade expect somewhat weaker economic conditions.

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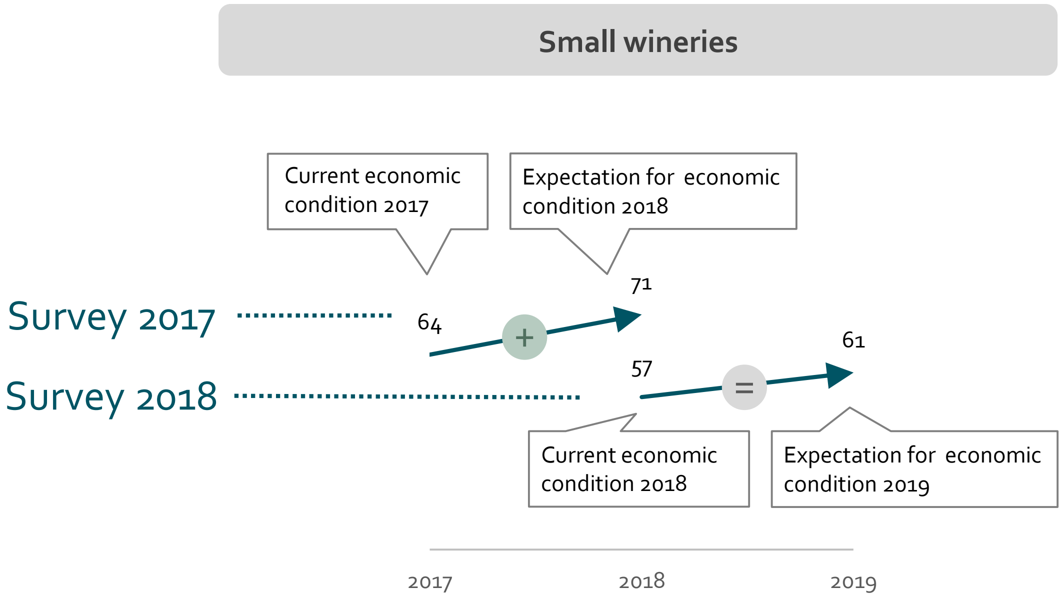
Legend – How to read the following slides

Examplie small wineries (n=X)



Expectation for next year

- + Positive (>4 points more)
- = Unchanged (≤ 4 points less or more)
- - Negative (>4 points less)

In 2017 small wineries were confident about their economic condition (+64) and expected a positive development for 2018 (+71). That expectation for 2018 appeared to be somewhat too optimistic. The actual economic condition in 2018 was weaker (+57) than expected (-71), most likely because of the small harvest. Expectations for 2019 are slightly positive but mainly unchanged.

Each survey wave measures the current and expected economic condition. Expectations from the previous year can be compared with current economic conditions to assess if expectations were fulfilled, were too positive or too negative.

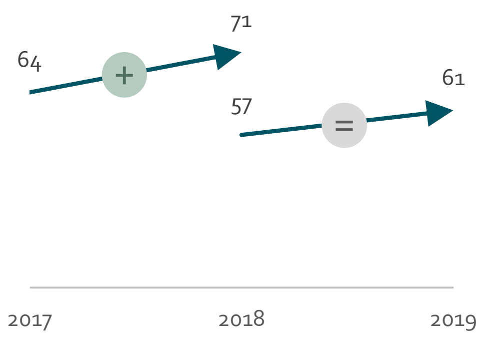
Overall economic condition

Current and future economic condition within the company

Showing Saldos of economic condition of the 2017 survey compared to the 2018 survey

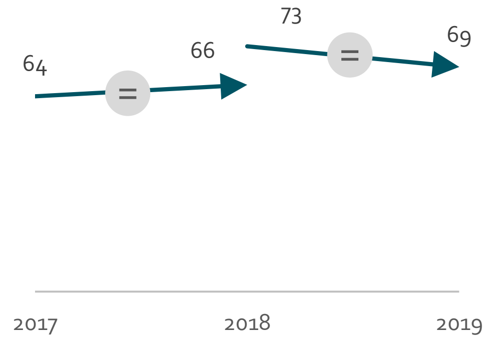
Base: All producers

Small wineries



In 2017 small wineries were confident about their economic condition and expected a positive development for 2018. That expectation for 2018 appeared to be slightly too optimistic. The actual economic condition in 2018 was weaker than expected, most likely because of the small 2017 harvest. Expectations for 2019 are mainly unchanged.

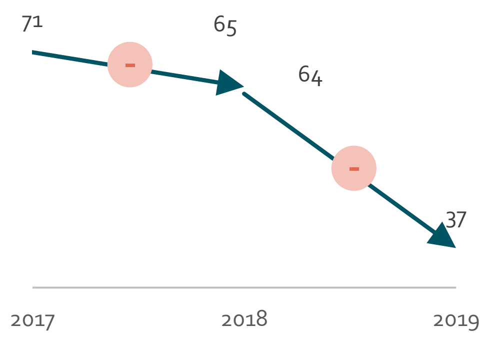
Large wineries



Large wineries' expected stable economic conditions for 2018. Actual conditions turned out to be more favourable than expected.

For 2019 large wineries expect mainly unchanged economic conditions.

Cooperatives



Cooperatives expected slightly less favourable economic conditions for 2018 that were confirmed in the later assessment.

For 2019 cooperatives expect a sharp downturn of economic conditions.

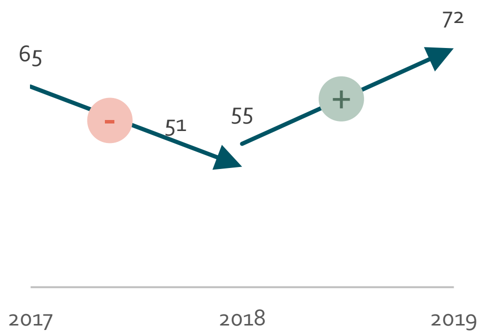
Overall economic condition

Current and future economic condition within the company

Showing Saldos of economic condition of the 2017 survey compared to the 2018 survey

Base: All Intermediaries

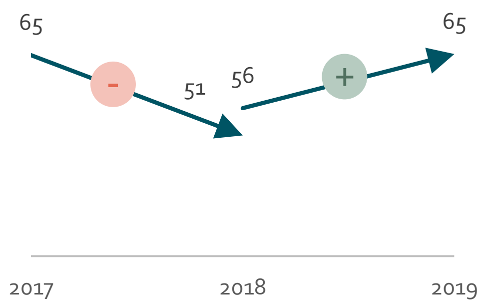
Exporters



In 2017 exporters expected less favourable conditions for 2018 that were confirmed in the later survey.

For 2019 exporters expect a sharp increase in economic conditions.

Importers



In 2017 importers expected less favourable conditions for 2018 that were confirmed in the later survey.

For 2019 exporters expect an increase in economic conditions.

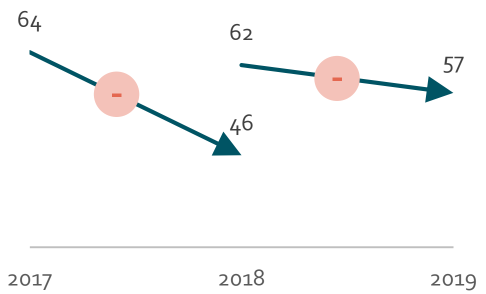
Overall economic condition

Current and future economic condition within the company

Showing saldos of economic condition of the 2017 survey compared to the 2018 survey

Base: All retailers

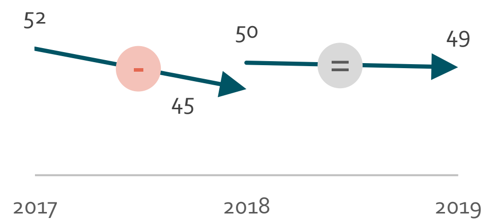
Wholesalers



In 2017 wholesalers expected less favourable conditions for 2018 that were not confirmed in the later assessment.

For 2019 wholesalers expect a slight decrease in economic conditions.

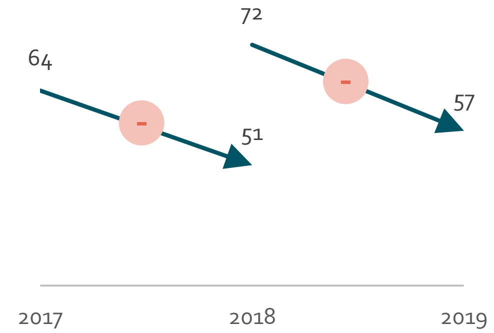
Specialty retailers



In 2017 specialty retailers expected somewhat less favourable conditions for 2018 that were confirmed in the later assessment.

For 2019 wholesalers expect unchanged economic conditions.

On-trade



In 2017 the on-trade expected less favourable conditions for 2018 that were not confirmed in the later assessment.

For 2019 the on-trade expects less positive economic conditions.

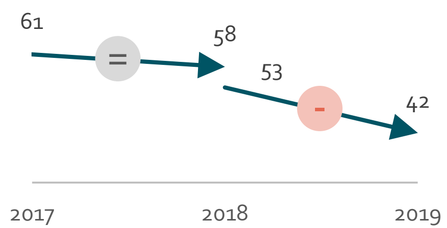
Economic condition by country
Producers

Current and future economic condition within the company by country

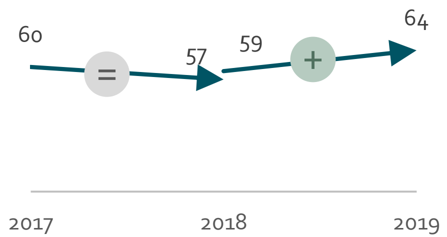
Showing the Saldo (positive minus negative opinions) for the current (now) and the future (in 12 months) economic condition within the company

Base: All participants (n=2230)

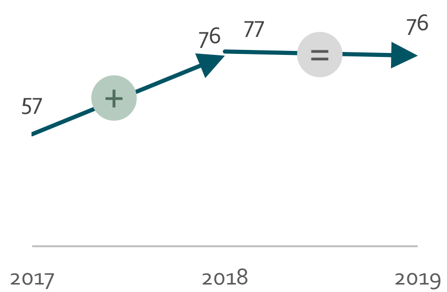
German producers



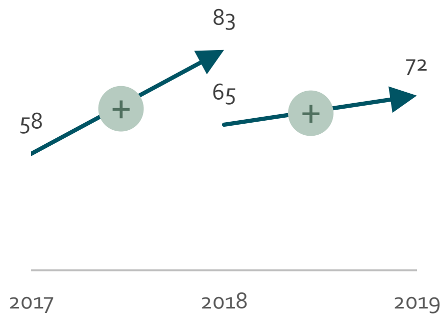
French producers



Italian producers



Spanish producers



German producers: Expectations for 2018 were slightly undercut by actual development. Expectations for 2019 are less favourable.

French producers: Expectations of stable economic conditions for 2018 were confirmed. Somewhat positive expectations for 2019.

Italian producers: strongly positive expectations for 2018 were fulfilled. Unchanged conditions expected for 2019.

Spanish producers: extremely positive expectations for 2018 were not met because of record low harvest. Improvement expected for 2019.

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Chapter 7

Details of Method

Expert online survey

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Timing

- The 2017 survey was conducted over a two weeks time period in January 2017.
- The 2018 survey was conducted over a three weeks time period in May 2018.

Participants

- Targets for the survey were companies working in the wine industry that plan to exhibit at or visit ProWein in 2017 for the 2017 survey.
- For the 2018 survey participants had to have exhibited at the 2018 ProWein or had to have visited the 2018 ProWein and agreed to be contacted by ProWein.
- All participants were asked to have leading rolls within their company or department.

	Contacted	Participants	Response rate
2017	21,569	1.487	6.9 %
2018	35,171	2,364	6.7 %

Method

- The surveys were conducted online.
- The surveys were offered in five language versions English, French, German, Italian and Spanish. Participants could choose the language of their preference.
- Participants who quit the survey too early or gave inconsistent answers were eliminated.

Type of company and company location

Type of company	2017 (%)	2018 (%)
Small winery (mainly own production of grapes)	27	14
Cooperative	3	3
Large winery (mainly buying wine, focus on bottling and marketing)	6	7
Exporter	28	5
Importer, distributer		27
Wholesaler focused on wine, sparkling wine and spirits	6	8
Specialty retailer focused on wine, sparkling wine and spirits	21	20
Hotel trade	2	3
Gastronomy	7	12

Type of company and company location

Company location	2018 (%)	2017 (%)
Producers and exporters (focus on export markets)		
France	27	26
Germany	15	15
Italy	21	21
Spain	13	12
Other Europe	11	12
Overseas	9	9
Other	4	6
Importers, Distributors, Wholesalers, Resellers (focus on wine origin countries)		
Germany	53	54
Netherlands	9	6
Other Central Europe	12	9
Scandinavia	6	6
Eastern Europe & Russia	4	4
Southern Europe	4	5
North America	4	5
Other	8	10

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