WINE INTELLIGENCE

Wine Shopper Report Germany

AUGUST 2019

- Wine Intelligence [XX] Ltd: 109 Maltings Place, 169 Tower Bridge Road, London SE1 3LJ [XX] Tel: 020 73781277. E-mail: info@wineintelligence.com. Registered [XX] in England as a limited company number: 4375306

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Wine Retail in the German Market

Introduction

Germany is not only one of the largest wine markets in the world, but also ranks among the most mature and attractive markets. Still wine volumes remain relatively stable, with a slight decrease in domestic wine volumes (-1 CAGR). In the channel to market landscape, supermarkets and discounters are the most-used channels. Supermarkets and the internet have become increasingly more important as sales channels since 2007, while mail order has been decreasing. Online, with focus on specialized trade, shows strong growth from a small base.

In this highly competitive market thorough understanding of retailer positioning, performance in the wine category and shopper behavior of wine drinkers becomes key success factors to defend or win share as well as realizing value growth. This report reviews the performance of retailers using the Net Promotor Score as an indicator, describes the profiles of wine drinkers that mainly shop with the respective retailers and provides an initial shopper focused segmentation of German wine drinkers.

With about one third of off-trade wine drinkers that have bought wine in the past 6 months at Rewe or Edeka, both are the most used retailers for wine purchases, closely followed by Aldi and Lidl. Both Rewe and Edeka are also in close competition for being the primary retailer from which off-trade wine drinkers mainly purchase their wine from.

In contrast to the most used retailers, the specialist wine retailer Jacques' Weindepot has the highest share of promoters, followed by the Cash & Carry-market Metro and the specialist wine retailer Hawesko. The two specialist wine retailers Jacques' Weindepot and Hawesko also have the highest Net Promoter Score (NPS), followed by Globus and Metro. Three out of top five NPS-ranking retailers are specialist wine retailers. Retailers with larger outlets / wine portfolios also tend to have higher Net Promoter Scores than those with smaller outlets / wine portfolios. Discounters have the lowest NPS scores.

Main-buyers of each retailer show significant differences regarding socio-demographics, consumption frequency, wine attitude, how they purchase, which brands they purchase and what they drink in general. Brand owners are well advised to reflect shopper differences of retailers in their brand strategy, account management as well as shopper, category and trade marketing.

Strong online wine retail NPS scores indicate the future potential of this channel for Germany. Initial shopper analysis identified a new generation of multichannel-shoppers which also points towards growth opportunities for online, hybrid on- and offline approaches and new formats.

Wilhelm Lerner
Country Manager Germany

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Management summary

Key trends in the German retail wine market 2019

1. GERMAN WINE MARKET REMAINS A MATURE, STABLE MARKET

- Germany is classified as a mature market and is currently the second most attractive wine market, following the US, according to Wine Intelligence's attractiveness model (Wine Intelligence Compass Report)
- Still wine volumes remain relatively stable in the German wine market, with a slight decrease in domestic wine volumes (-1 CAGR), while value is slightly increasing (+1 CAGR) over the past five years

2. SUPERMARKETS AND ONLINE ARE ON THE RISE

- Supermarkets and discounters are the most-used channels by off-trade wine drinkers
- Supermarkets and the internet have become increasingly more important as sales channels since 2007, while mail order has been decreasing
- Online - with focus on specialized trade - shows strong growth from a small basis

3. SUPERMARKETS EDEKA AND REWE WITH HIGEST SHARE OF BUYERS

- With about 1 out of 3 off-trade wine drinkers that have bought wine in the past 6 months at Rewe or Edeka, they are the most used retailers for wine purchases, followed by Aldi and Lidl
- Both are in close competition for being the primary retailer of which off-trade wine drinkers mainly purchase their wine from

4. SPECIALIST WINE RETAILERS WITH HIGHEST NET PROMOTER SCORE (NPS)

- The specialist wine retailer Jacques' Weindepot has the highest share of promoters, followed by the Cash & Carry-market Metro and the specialist wine retailer Hawesko
- The two specialist wine retailers Jacques' Weindepot and Hawesko also have the highest Net Promoter Score, followed by Globus and Metro
- 3 out of the top 5 NPS-ranking stores are specialist wine retailers. Retailers with larger outlets / wine portfolios tend to have a higher Net Promoter Score than those with smaller outlets / wine portfolios. Discounters have the lowest NPS

Management summary

Key trends in the German wine market 2019

5. SHOPPER PROFILES OF GERMAN RETAILERS DIFFER SIGNIFICANTLY

- The main-buyers of each retailer show significant differences with regards to their socio-demographics, their consumption frequency, their wine attitude, how they purchase wine, which brands they purchase and what they drink in general
- Brand owners are well advised to reflect shopper differences of their retail customers and in their brand strategy, account management as well as shopper, category and trade marketing (e.g. POS, promotions)

6. STRONG INITIAL ONLINE WINE RETAIL NET PROMOTER SCORE DATA INDICATE FUTURE POTENTIAL OF THIS CHANNEL FOR GERMANY

- The specialist online retailer moevenpick-wein.de has the highest share of promoters and highest net promoter score, followed by vivino.com and edeka24.de
- With rewe.de, hawesko.de and lidl.de, a mix of different retailer types (supermarket, specialist and discounter) are the most used online retailers to shop for wine

7. INITIAL SHOPPER ANALYSIS IDENTIFIED A NEW GENERATION OF MULTICHANNEL-SHOPPERS WHICH ALSO POINTS TOWARDS GROWTH OPPORTUNITIES FOR ONLINE AND NEW FORMATS

- A “new “ generation of multichannel-shopper offers opportunities to excite and has potential for value growth

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The German wine market

Overview of the German wine market

Market classification:

Mature

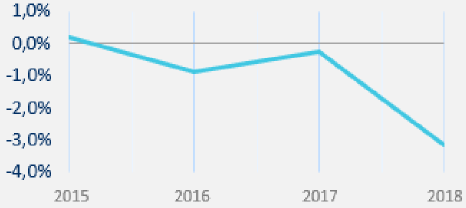
Wine Intelligence Compass 2019

WINE MARKET SUMMARY:

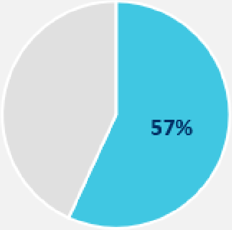
4th largest wine market

Total wine consumption:	214.605	'000 9l cases of still light wine
Long-term trend 2014-18:	-1,02%	CAGR 2014-18
Per capita consumption:	28,8	litres per year (all wine)
Imported wine consumption:	122.005	'000 9l cases of still light wine
Share of imported wine:	57%	

Wine volume growth rates:



Share of imported wine:

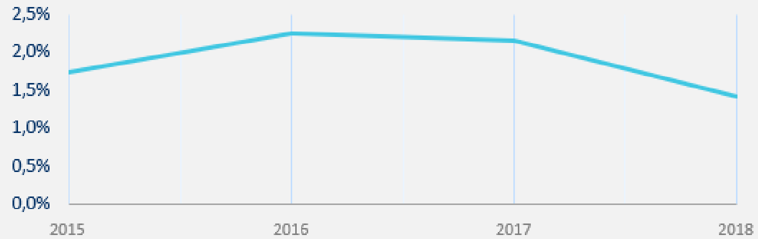


Sources: IWSR, ComTrade, Wine Intelligence Calibration studies, Wine Intelligence Vinitrac®, Wine Intelligence market experience

ECONOMIC SUMMARY:

Adult population:	71,5	Million
GDP/capita:	$ 47.502	Dollars
GDP long-term trend:	1,95%	Average growth 2014-18
GNI/capita:	$ 47.450	Dollars
Unemployment rate:	3,4%	
Corruption index:	80	0 to 100 (100 = no corruption)
Comparative globalisation index:	9	1 to 10 (10 = very globalised)

GDP growth rates:



Sources: The IWSR, World Bank, IMF, United Nations, Eurostat, Trading and Economics, Transparency International, Starbucks, McDonald's, The Guardian

Market classification

Five distinct groups with different volume totals, average growth and per capita consumption

MATURE	ESTABLISHED	GROWTH	EMERGING	NEW EMERGING
Markets where wine appears to have reached its potential with stable or declining volumes	Markets with strong historical growth which is tailing off	Markets where wine is a mainstream product and / or experiencing growth	Markets where wine is experiencing growth and shows potential from a relatively low base	Markets where wine is still a relatively new and unknown beverage, but showing potential
France (3)	Hong Kong (12)	United States (1)	China (6)	India (38)
Germany (4)	Ireland (13)	Canada (2)	Taiwan (21)	Indonesia (40)
Netherlands (5)	Italy (17)	South Korea (10)	Russia (33)	Philippines (44)
United Kingdom (7)	Portugal (23)	Poland (14)	Turkey (39)	Thailand (45)
Denmark (8)	New Zealand (24)	Romania (16)	Colombia (42)	Malaysia (46)
Switzerland (9)	Czech Republic (27)	Singapore (19)	Peru (48)	Vietnam (47)
Australia (11)	Finland (30)	Mexico (26)	Angola (50)	Nigeria (49)
Belgium & Luxembourg (15)	Hungary (31)	Brazil (28)		
Sweden (18)	Greece (35)	United Arab Emirates (36)		
Japan (20)	Slovenia (37)			
Spain (22)	South Africa (43)			
Austria (25)				
Norway (29)				
Chile (32)				
Slovakia (34)				
Argentina (41)				

() Rank by attractiveness

() Top 10 most attractive wine markets in the world

Source: Wine Intelligence global wine market attractiveness model

Imported vs. domestic still wine market share

Still wine volumes are declining in the German wine market while value remains relatively stable

Germany **still wine** volumes and price per bottle (total and by country of origin)

Thousands of 9 litre cases	2014	2015	2016	2017	2018	CAGR 14-18	CAGR 17-18	Market share	Retail price per 0.75L		
									2018 (US$)	CAGR 14-18	CAGR 17-18
Total	223.614	224.072	222.137	221.549	214.605	-1%	-3%	100%	3,86	1%	1%
Domestic	95.790	95.830	96.145	97.385	92.600	-1%	-5%	43%	3,85	1%	1%
Imported	127.824	128.242	125.992	124.164	122.005	-1%	-2%	57%	3,87	1%	1%
Italian	46.105	47.510	47.370	46.060	43.725	-1%	-5%	20%	3,70	1%	2%
Spanish	28.030	27.790	27.630	28.980	28.895	1%	0%	13%	3,14	2%	3%
French	22.870	21.825	20.960	20.195	19.550	-4%	-3%	9%	4,89	2%	2%
South African	7.140	7.500	7.515	7.580	8.290	4%	9%	4%	3,22	0%	-1%
Chilean	4.000	4.425	4.185	3.730	3.515	-3%	-6%	2%	4,91	0%	-1%
Australian	3.160	3.255	3.235	3.075	3.220	0%	5%	2%	4,60	1%	-1%
Austrian	2.625	2.870	2.610	2.440	2.505	-1%	3%	1%	5,83	1%	-5%
Macedonian	3.000	2.800	2.400	2.210	2.350	-6%	6%	1%	1,35	-1%	0%
US	2.380	2.450	2.410	2.305	2.315	-1%	0%	1%	5,77	1%	-1%
Portuguese	1.050	1.000	1.170	1.225	1.280	5%	4%	1%	3,80	-3%	-1%

Source: IWSR 2018

Imported vs. domestic sparkling and fortified wine market share

Similar trends for sparkling wine volumes and value, with a slight decrease in overall volumes and a slight increase in value

Germany **sparkling wine** volumes and price per bottle (total and by country of origin)

Thousands of 9 litre cases	2014	2015	2016	2017	2018	CAGR 14-18	CAGR 17-18	Market share	Retail price per 0.75L 2018 (US$)	Retail price CAGR 14-18	Retail price CAGR 17-18
Total	46.770	46.040	45.600	44.930	43.609	-2%	-3%	100%	5,27	1%	1%
Domestic	34.545	33.995	34.160	33.545	32.290	-2%	-4%	74%	4,37	1%	0%
Imported	12.225	12.045	11.440	11.385	11.319	-2%	-1%	26%	7,84	2%	0%
Italian	7.625	7.250	7.010	6.825	6.673	-3%	-2%	15%	4,92	0%	1%
Spanish	2.615	2.855	2.520	2.670	2.577	0%	-4%	6%	6,70	0%	0%
French	1.865	1.845	1.825	1.805	1.975	1%	9%	5%	18,98	1%	-7%
Ukrainian	70	40	30	30	40	-13%	33%	0%	12,17	3%	9%
Austrian	29	33	33	32	35	5%	9%	0%	14,66	2%	0%

Germany **fortified wine** volumes and price per bottle (total and by country of origin)

Thousands of 9 litre cases	2014	2015	2016	2017	2018	CAGR 14-18	CAGR 17-18	Market share	Retail price per 0.75L 2018 (US$)	Retail price CAGR 14-18	Retail price CAGR 17-18
Total	550	495	482	475	460	-4%	-3%	100%	7,38	0%	2%
Domestic	0	0	0	0	0	-	-	0%		-	-
Imported	550	495	482	475	460	-4%	-3%	100%	7,38	0%	2%
Spanish	390	350	345	340	325	-4%	-4%	71%	5,92	-1%	3%
Portuguese	157	141	133	131	131	-4%	0%	29%	10,78	2%	-1%
French	3	3	3	3	3	0%	0%	1%	14,11	1%	0%
South African	0	1	1	1	1	9%	-33%	0%	21,25	0%	0%

Source: IWSR 2018

Per capita consumption of still light wine

The per capita consumption of still wine in Germany has experienced a slight decline in the short- and long-term

Per capita consumption of **still light wine** (red, white and rosé wine) in liters per annum

	Market	2014	2015	2016	2017	2018	CAGR 14-18	CAGR 17-18
1	Portugal	43,7	45,5	46,2	47,5	46,7	1,7%	-1,7%
2	Italy	41,9	43,2	45,0	45,1	44,7	1,7%	-0,8%
3	Montenegro	46,2	45,6	44,9	44,7	44,4	-1,0%	-0,8%
4	Slovenia	42,6	42,9	43,0	43,6	43,7	0,6%	0,4%
5	France	44,8	43,4	42,5	41,8	40,3	-2,6%	-3,6%
6	Switzerland	40,7	40,1	39,5	38,7	38,2	-1,6%	-1,4%
7	Malta	33,8	34,7	34,8	35,2	35,5	1,2%	0,7%
8	Greece	31,5	31,5	32,0	32,4	32,9	1,1%	1,4%
9	Austria	34,1	33,7	33,4	32,8	32,6	-1,1%	-0,8%
10	Denmark	34,7	34,0	33,8	33,0	32,2	-1,8%	-2,3%
11	Hungary	31,0	31,3	31,6	31,7	31,9	0,7%	0,7%
12	Germany	29,9	30,0	29,8	29,7	28,8	-1,0%	-3,0%
13	Argentina	31,2	30,5	29,7	28,7	27,4	-3,2%	-4,6%
14	Romania	23,2	23,9	25,0	25,5	25,8	2,7%	1,1%
15	Australia	26,5	26,1	26,4	26,2	25,4	-1,1%	-3,0%
16	Uruguay	28,0	27,3	26,2	25,6	25,4	-2,4%	-0,8%
17	Netherlands	25,3	25,4	24,6	24,4	23,9	-1,4%	-2,3%
18	Slovakia	23,7	23,8	23,9	23,5	23,6	-0,1%	0,7%
19	Sweden	24,0	23,7	23,4	23,0	23,1	-1,0%	0,3%
20	New Zealand	23,5	23,3	23,5	23,5	23,0	-0,6%	-2,2%
21	Serbia	21,4	21,7	21,8	22,1	22,5	1,2%	1,9%
22	Bulgaria	17,7	19,3	19,9	20,6	21,3	4,6%	3,4%
23	Belgium and Luxembourg	24,6	23,6	23,1	22,2	21,2	-3,7%	-4,4%
24	Georgia	17,9	19,1	19,9	20,7	21,1	4,2%	2,0%
25	United Kingdom	21,9	21,4	20,8	20,2	19,5	-2,8%	-3,3%

Source: IWSR 2018

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Overview of the German wine market

The top-down view

Adult population: 66.2 million[1]

↓ 67%

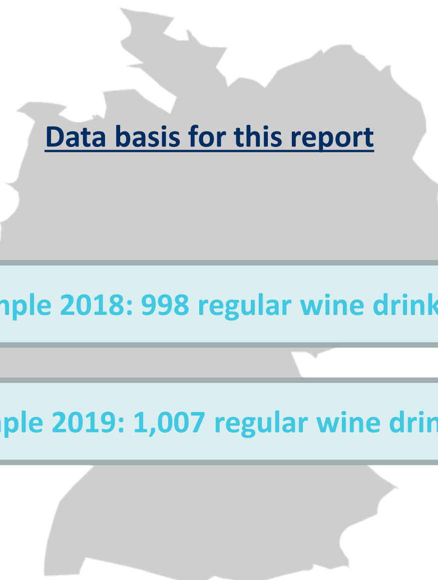
Wine drinkers (drink wine at least once per year): 44.4 million[2]

↓ 62%

Regular wine drinkers (drink wine at least once per month): 27.5 million[2]

↓ 99,6%

Regular off-trade wine drinkers: 27.4 million[3] — *Sample for this report*



Data basis for this report

Sample 2018: 998 regular wine drinkers

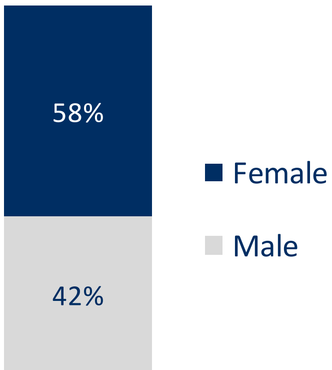
Sample 2019: 1,007 regular wine drinkers

Sources: [1] DESTATIS
[2] Axel Springer AG, Media Bauer Group, Verbraucheranalyse 2017, n=28,742 adults aged 18+. Wine=still light wine (red, white, rosé)
[3] Wine Intelligence, Vinitrac® Germany October '18, January '19, n=2,005 German regular off-trade wine drinkers

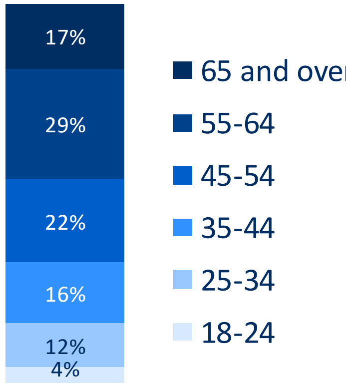
Demographics of German off-trade wine drinkers

German off-trade wine drinkers are predominantly female and almost half of them are aged 55 years or over

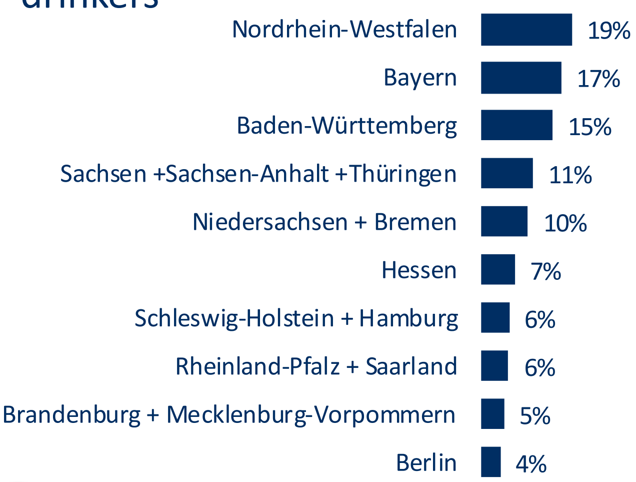
Gender



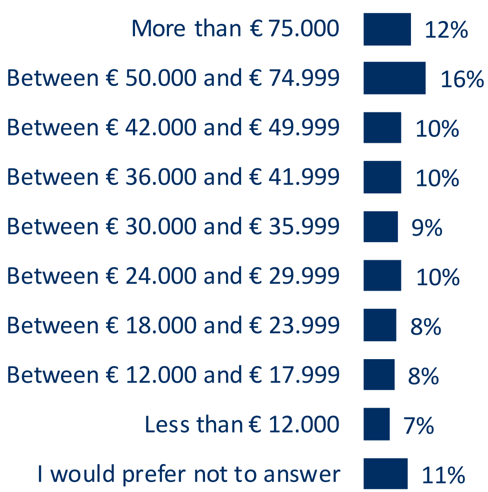
Age



Region of residence of German off-trade wine drinkers



Total household income before taxes (per annum)



Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers

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Wine-buying channel usage

Supermarkets and the Internet have become more important as sales channel

wine intelligence

Wine-buying channel usage (long-term trend)

% who have bought wine from the following channels in the past 6 months
Base = All German regular wine drinkers (n>=1,028)

Rank 2018	Channel	2007 - 2009 1,028	2010 - 2011 3,008	2013 - 2014 2,039	2015 - 2016 3,009	2017 3,006	2018 3,007
1	In the supermarket (eg Rewe, Edeka, Tengelmann, Kaiser´s)	52%	57%	55%	58%	59%	59%
2	From a discounter (eg Aldi, Lidl, Penny, Netto)	45%	46%	49%	48%	46%	47%
3	In the hyper-market (eg real-, Marktkauf, Kaufland, Globus)	47%	48%	48%	46%	41%	43%
4	From a specialist wine shop	35%	38%	33%	34%	32%	30%
5	From the wine producer's cellar	24%	24%	24%	30%	25%	24%
6	Through Internet	10%	12%	15%	18%	18%	18%
7	Department store (eg Karstadt, Galeria Kaufhof)	11%	12%	12%	15%	12%	10%
8	On shopping trips abroad	11%	11%	8%	9%	10%	8%
9	Cash & Carry (eg Metro, Selgros)	11%	11%	7%	8%	7%	7%
10	From Duty Free (e.g. airports)	2%	4%	4%	6%	6%	6%
11	Through mail order	18%	18%	13%	6%	5%	5%
12	From a convenience store	8%	8%	5%	5%	4%	4%
	Other, please specify:	3%	3%	2%	2%	2%	2%
	I do not buy wine to drink at home	0%	0%	0%	0%	0%	0%

Source: Wine Intelligence, Vinitrac® Germany, March '07 – July '18, n>=1,028 German regular wine drinkers

Wine-buying channel usage

Supermarkets and discounters are the most-used channels by off-trade wine drinkers

Wine-buying channel usage

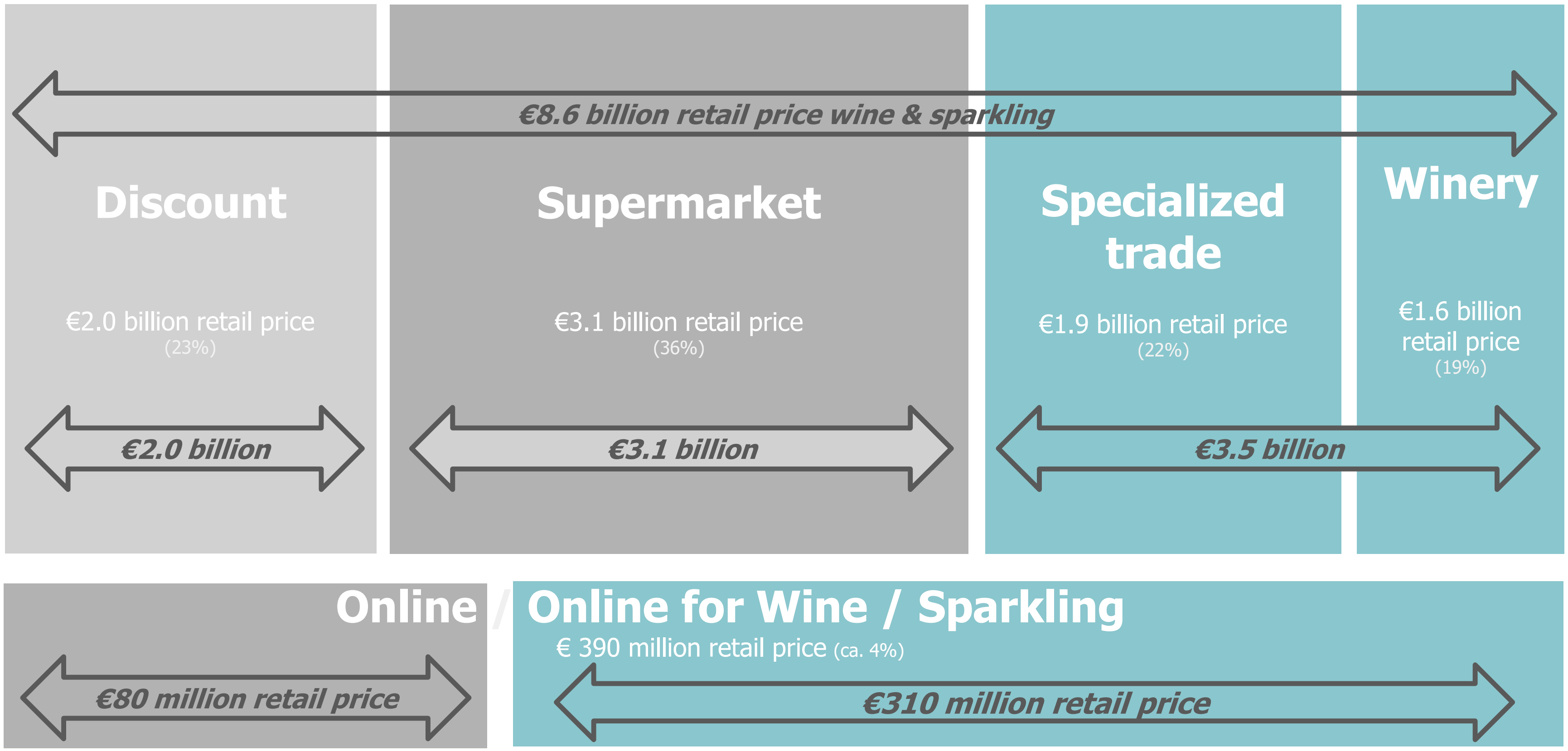
% who have bought wine from the following channels in the past 6 months
Base = All German regular wine drinkers, who drink wine in the off-trade (n=2,005)

Rank		Off-trade wine drinkers
	n=	*2,005*
1	In the supermarket (eg Rewe, Edeka, Tengelmann, Kaiser´s)	59%
2	From a discounter (eg Aldi, Lidl, Penny, Netto)	47%
3	In the hyper-market (eg real, Marktkauf, Kaufland, Globus)	39%
4	From a specialist wine shop	28%
5	From the wine producer's cellar	25%
6	Through Internet	16%
7	Department store (eg Karstadt, Galeria Kaufhof)	10%
8	On shopping trips abroad	10%
9	From Duty Free (eg airports)	7%
10	Cash & Carry (eg Metro, Selgros)	7%
11	Through mail order	5%
12	From a convenience store	4%
	Other	1%

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n>=2,005 German regular off-trade wine drinkers

Structure German wine trade

Online - with focus on specialized trade - with strong growth from a small basis



Source: Wine Intelligence / HGU, Representative survey HGU, WI, Nielsen/IRI, GfK, Euromonitor, Trinkweinbilanz

Overview German retailer

Top 30 German retailers (rank 1-15)

= included in this report

Rank	Company	Sales 2018 (in million €)	Sales 2017 (in million €)	Change in sales	Sales outlets 2018	Market share Germany
1	**Edeka**	**58,750**	**56,340**	**4.3%**	**13.030**	**21.5%**
	Edeka full range provider	38,700	36,930	4.8%	6.610	
	Netto	14,810	14,360	3.1%	4.320	
	Regional discounter	1,360	1,400	-2.9%	520	
	Other distribution chain	3,880	3,650	6.3%	1.580	
2	**Rewe Group**	**40,020**	**38,425**	**4.2%**	**7.705**	**14.7%**
	Rewe full range provider	28,188	26,932	4.7%	4.601	
	Penny	8,408	8,140	3.3%	2.200	
	Other distribution chain	3,424	3,353	2.1%	904	
3	**Schwarz Group**	**39,975**	**38,800**	**3.0%**	**3.864**	**14.7%**
	Lidl	24,775	23,653	4.7%	3.200	
	Kaufland	15,200	15,147	0.3%	664	
4	**Aldi**	**30,294**	**29,401**	**3.0%**	**4.112**	**11.1%**
	Aldi Süd	17,300	16,552	4.5%	1.900	
	Aldi Nord	12,994	12,879	0.9%	2.212	
5	**Amazon**	**15,241**	**12,978**	**17.4%**	**-**	**5.6%**
6	**Metro AG**	**13,508**	**13,656**	**-1.1%**	**382**	**5.0%**
	Metro Cash + Carry	5,280	5,229	1.0%	103	
	Real	8,228	8,427	-2.4%	279	
7	**Lekkerland**	**8,837**	**8,926**	**-1.0%**	**-**	**3.3%**
8	**dm**	**8,110**	**7,857**	**3.2%**	**1.956**	**3.0%**
9	**Rossmann**	**6,660**	**6,400**	**4.1%**	**2.150**	**2.4%**
10	**Globus**	**5,164**	**5,086**	**1.5%**	**144**	**1.9%**
	Globus SB-Warenhäuser	3,377	3,344	1.0%	48	
	Hardware store	1,787	1,742	2.6%	96	
11	**Bartels-Langness (Bela)**	**5,163**	**4,949**	**4.3%**	**815**	**1.9%**
	Bela non-independent	1,377	1,342	2.6%	119	
	Bela independent	140	144	-3.1%	193	
	Wholesale	2,899	2,778	4.3%	4	
	Citti	146	144	1.4%	3	
	Other distribution chain	602	541	11.2%	496	
12	**Coop Switzerland (Transgourmet)**	**3,988**	**3,914**	**1.9%**	**53**	**1.5%**
13	**Norma**	**3,580**	**3,502**	**2.2%**	**1.314**	**1.3%**
14	**Müller**	**3,296**	**3,214**	**2.6%**	**551**	**1.2%**
15	**Dohle**	**1,526**	**1,485**	**2.8%**	**98**	**0.6%**

Source: Lebensmittelzeitung – Top 30 Lebensmittelhandel Deutschland 2018

Overview German retailer

Top 30 German retailers (rank 16-30)

= included in this report

Rank	Company	Sales 2018 (in million €)	Sales 2017 (in million €)	Change in sales	Sales outlets 2018	Market share Germany
16	**Bünting**	**1,483**	**1,557**	**-4.8%**	**335**	**0.5%**
	Full range provider non independent	1,285	1,350	-4.8%	198	
	Independent retailer	196	199	-1.6%	134	
	Other distribution chain	2	8	-77.1%	3	
17	**Fressnapf**	**1,397**	**1,328**	**5.2%**	**967**	**0.5%**
18	**Dennree**	**1,252**	**1,206**	**3.8%**	**559**	**0.5%**
	Denn's	634	605	4.8%	290	
	Biomarkt	380	374	1.8%	269	
	Denree wholesale	237	227	4.5%	-	
19	**Salling Group (Netto)**	**1,187**	**1,168**	**1.6%**	**345**	**0.4%**
20	**Migros (Tegut)**	**1,130**	**1,101**	**2.7%**	**273**	**0.4%**
21	**Bofrost**	**734**	**730**	**0.5%**	**-**	**0.3%**
22	**Handelshof**	**723**	**719**	**0.5%**	**16**	**0.3%**
23	**Klaas+Kock**	**634**	**629**	**0.9%**	**215**	**0.2%**
24	**Kaes**	**632**	**623**	**1.5%**	**54**	**0.2%**
25	**Alnatura**	**598**	**570**	**4.9%**	**131**	**0.2%**
26	**Monolith-Group**	**572**	**534**	**7.2%**	**195**	**0.2%**
	Mix Markt	441	406	8.6%	195	
	Monolith Delivery	131	128	2.5%	-	
27	**Fleggaard**	**557**	**542**	**2.8%**	**18**	**0.2%**
	Fleggaard	401	391	2.6%	8	
	Calle	156	151	3.3%	10	
28	**Budnikowsky**	**503**	**493**	**2.0%**	**183**	**0.2%**
29	**B&M**	**342**	**264**	**29.8%**	**97**	**0.1%**
30	**Brülle & Schmeltzer**	**300**	**299**	**0.4%**	**6**	**0.1%**

Source: Lebensmittelzeitung – Top 30 Lebensmittelhandel Deutschland 2018

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Wine-buying retailer usage

Rewe and Edeka are the most used retailers for wine purchases, followed by Aldi and Lidl

Wine-buying retailer usage **(in the past 6 months)**

% who have used the following retailers to buy wine in the past 6 months
Base = All German regular wine drinkers, who drink wine in the off-trade (n=2,005)

Rank		Off-trade wine drinkers
	n=	*2,005*
1	Rewe / Rewe Center	34%
2	Edeka / Neukauf / Aktiv Markt / E-Center	33%
3	Aldi	28%
4	Lidl	26%
5	Kaufland	23%
6	Real	16%
7	Netto	15%
8	Jacques´ Weindepot	11%
9	Penny	11%
10	Norma	5%
11	Marktkauf	5%
12	Galeria Kaufhof	5%
13	Metro	4%
14	Karstadt	4%
15	Globus	4%
16	Hawesko	3%
17	Mövenpick Weinkeller	2%
18	Vom Fass	2%
	Other	11%
	None of these	4%

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers

Main wine-buying retailer usage

Rewe and Edeka are in close competition for being the primary retailer of which off-trade wine drinkers mainly purchase their wine from

Main wine-buying retailer usage

% who mainly use the following retailers to buy wine

Base = All German regular wine drinkers, who drink wine in the off-trade (n=2,005)

Rank		Off-trade wine drinkers
	n=	*2,005*
1	Rewe / Rewe Center	27%
2	Edeka / Neukauf / Aktiv Markt / E-Center	26%
3	Aldi	19%
4	Kaufland	19%
5	Lidl	17%
6	Real	12%
7	Netto	10%
8	Jacques´ Weindepot	9%
9	Penny	7%
10	Marktkauf	4%
11	Norma	3%
12	Galeria Kaufhof	3%
13	Globus	3%
14	Metro	2%
15	Hawesko	2%
16	Karstadt	2%
17	Mövenpick Weinkeller	2%
18	Vom Fass	1%
	Other	10%
	None of these	3%

Source: Wine Intelligence, Vinitrac® Germany, October ‘18, January ‘19, n=2,005 German regular off-trade wine drinkers

Retailer net promoter score

Calculation

Base: Main Buyers

(those who selected one of the stores as one of their three main wine buying stores)

Promoter share

(Those who recommend the store to a friend with a 9 or 10 on a scale of 1 to 10)

1	2	3	4	5	6	7	8	9	10
Detractors						Passives		Promoters	

= % Promoter share

Retailer promoter score

Jacques' Weindepot has the highest share of promoters, followed by Metro and Hawesko

Promoter Score

% who would recommend the retailer with a likelihood of 9 or 10
Base= Those who selected one of the stores as one of their three main wine buying stores

Rank		% Promoter
1	Jacques´ Weindepot	69%
2	Metro	60%
3	Hawesko	57%
4	Globus	56%
5	Mövenpick Weinkeller	55%
6	Galeria Kaufhof	44%
7	Kaufland	42%
8	Marktkauf	39%
9	Edeka / Neukauf / Aktiv Markt / E-Center	38%
10	Karstadt	37%
11	Real	37%
12	Rewe / Rewe Center	36%
13	Aldi	35%
14	Vom Fass	34%
15	Netto	31%
16	Lidl	29%
17	Norma	27%
18	Penny	20%

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers

Retailer net promoter score

Calculation

Base: Main Buyers
(those who selected one of the stores as one of their three main wine buying stores)

Promoter share
(Those who recommend the store to a friend with a likelihood 9 or 10 on a scale of 1 to 10)

Net Promoter Score (NPS)
(How likely are you to recommend the store to a friend on a scale of 1 to 10, for its wine assortment?)

1	2	3	4	5	6	7	8	9	10
Detractors						Passives		Promoters	

% of Promoters − **% of Detractors** = **Net Promoter Score**

Retailer net promoter score

Interpretation of NPS Score

What is a good NPS Score?

Source: Retently (www.retently.com/blog/good-net-promoter-score)

Retailer net promoter score

The two specialist wine retailers Jacques' Weindepot and Hawesko have the highest NPS, followed by the retailers Globus and Metro

Net Promoter Scores

% who would recommend the retailer with a likelihood of 9 or 10 subtracted by the % who would recommend the retailer with a likelihood of 1 to 6
Base= Those who selected one of the stores as one of their three main wine buying stores

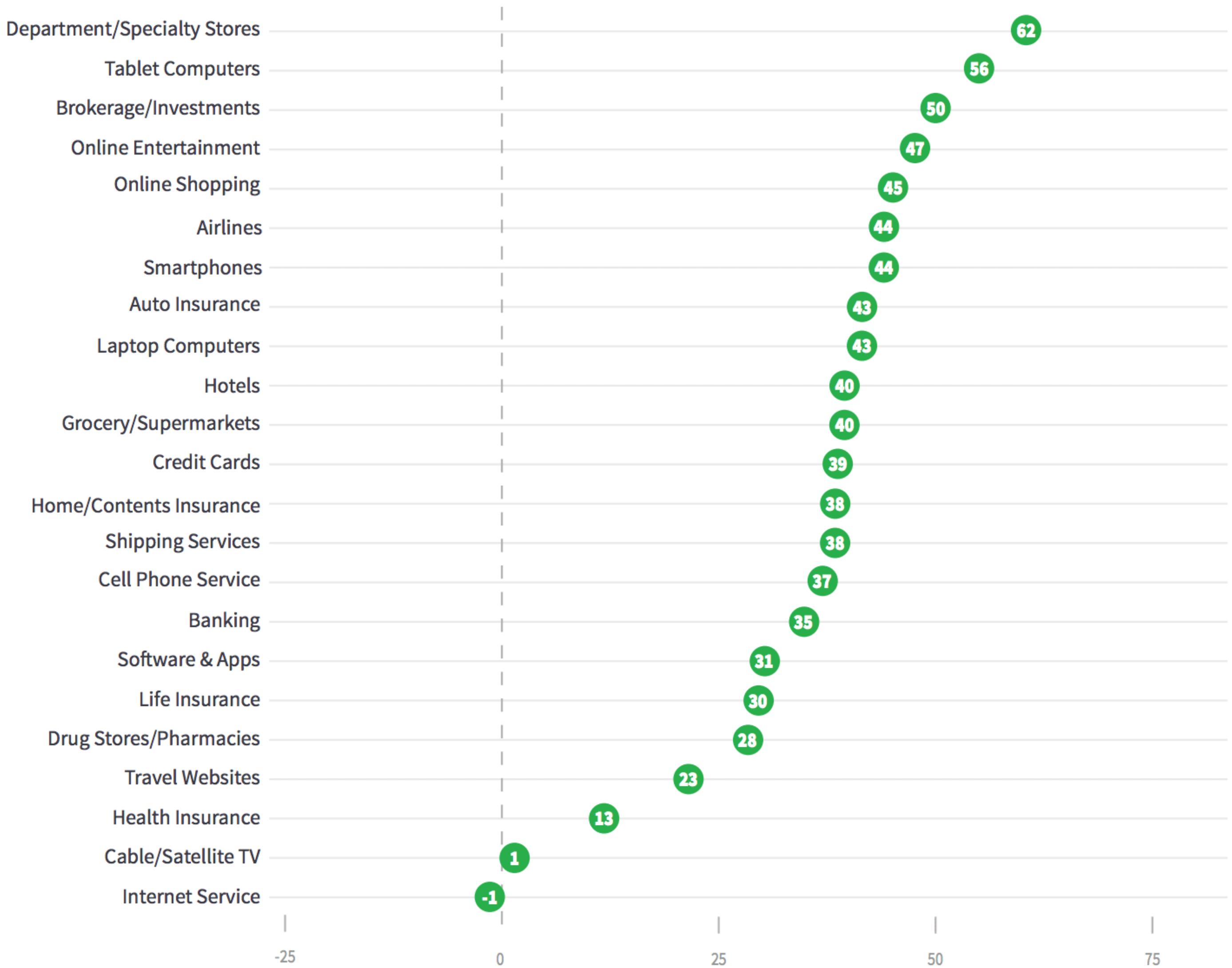
Rank		Net Promoter Score
1	Jacques´ Weindepot	56.6
2	Hawesko	49.5
3	Globus	48.5
4	Metro	45.6
5	Mövenpick Weinkeller	41.4
6	Kaufland	20.8
7	Galeria Kaufhof	18.4
8	Marktkauf	18.4
9	Real	15.5
10	Edeka / Neukauf / Aktiv Markt / E-Center	14.7
11	Rewe / Rewe Center	12.5
12	Karstadt	8.9
13	Vom Fass	5.9
14	Aldi	3.5
15	Lidl	-5.1
16	Netto	-6.4
17	Penny	-18.0
18	Norma	-21.3

3 out of the top 5 NPS-ranking stores are **specialist wine retailers**. **Retailers with larger outlets/wine portfolios** tend to have a **higher NPS** than those with smaller outlets/wine portfolios. **Discounters** have the **lowest NPS**.

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers

Retailer net promoter score

US Net Promoter Score for comparison



European scores are typically lower than US scores due to different scoring behavior*

Source: NICE Satmetrix U.S. Consumer Net Promoter Benchmarks 2018 for US values
*https://www.checkmarket.com/blog/nps-eu/

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Rewe – shopper profile

REWE

- 78% (vs. 34% ROWD*) state that the wine assortment at Rewe is right for people like them
- 36% are Rewe Promoters

Base= Those who selected Rewe as one of their three main wine buying stores (n=540)

Who they are:

- 41% male
- 59% female

AGE

- 20% 18-34
- 40% 35-54
- 41% (vs. 46%) 55 and over

- 6% drink wine most days / every day
- 28% drink wine 2-5 times a week
- 32% drink wine about once a week
- 33% drink wine 1-3 times a month

Wine attitude:

Wine involvement
- 25% low involvement
- 43% medium involvement
- 32% high involvement

Wine attitude
- 47% enjoy trying new and different styles of wine
- 9% don't mind what they buy so long as the price is right
- 44% know what they like and tend to stick to it

Wine purchases:

Choice cues
1 - Wine that matches or compliments food (74%)
2 – Grape variety (72%)
3 - Taste or wine style descriptions (72%)

Brands purchased
Blanchet (22% vs. 16% ROWD)
Erben (15% vs. 12% ROWD)
Amselfelder (11%)
Gallo (11% vs. 8% ROWD)
J.P. CHENET J.P. Chenet (11%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.3
With an informal meal at home	3.2
With a more formal dinner party at home	1.4
At a party / celebration at home	1.5

What they drink:

Grape varieties – white
1 - Riesling (56%)
2 - Chardonnay (46%)
3 - Pinot Grigio / Pinot Gris (39% vs. 34% ROWD)
4 - Müller-Thurgau (37%)
5 - Sauvignon Blanc (35%)

Grape varieties – red
1 - Merlot (57% vs. 52% ROWD)
2 - Dornfelder (54%)
3 - Pinot Noir (37% vs. 32% ROWD)
4 - Cabernet Sauvignon (35%)
5 - Shiraz/ Syrah (16%)

Country of origin consumption
1 - Germany (76%)
2 - France (54% vs. 47% ROWD)
3 - Italy (51%)
4 - Spain (38%)
5 - South Africa (20%)

Region of origin consumption
1 - Bordeaux (25%)
2 - Mosel (23% vs. 18% ROWD)
3 - Rheinhessen (19%)
4 - Württemberg (19%)
5 - Pfalz (19%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Edeka – shopper profile

- 81% (vs. 36% ROWD*) state that the wine assortment at Edeka is right for people like them
- 38% are Edeka Promoters

Base= Those who selected Edeka as one of their three main wine buying stores (n=515)

Who they are:

- 36% (vs. 42% ROWD) male
- 64% (vs. 58% ROWD) female

- 19% 18-34
- 44% (vs. 38% ROWD) 35-54
- 37% (vs. 46% ROWD) 55 and over

- 5% drink wine most days / every day
- 23% drink wine 2-5 times a week
- 38% drink wine about once a week
- 33% drink wine 1-3 times a month

Wine attitude:

Wine involvement
- 28% low involvement
- 42% medium involvement
- 30% high involvement

Wine attitude
- 46% enjoy trying new and different styles of wine
- 9% don't mind what they buy so long as the price is right
- 45% know what they like and tend to stick to it

Wine purchases:

Choice cues
1 - Wine that matches or compliments food (79%)
2 - Taste or wine style descriptions (73% vs. 68% ROWD)
3 - Grape variety (73%)

Brands purchased
Blanchet (21% vs. 16% ROWD)
Erben (13%)
J.P. Chenet (10%)
Amselfelder (10%)
Die Jungen Frank'n (9%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	5.8
With an informal meal at home	3.1
With a more formal dinner party at home	1.2
At a party / celebration at home	1.6

What they drink:

Grape varieties – white
1 - Riesling (53%)
2 - Chardonnay (45%)
3 - Müller-Thurgau (39% vs. 33%)
4 - Pinot Grigio / Pinot Gris (36%)
5 - Sauvignon Blanc (34%)

Grape varieties – red
1 - Dornfelder (54%)
2 - Merlot (54%)
3 - Cabernet Sauvignon (31%)
4 - Pinot Noir (31%)
5 - Shiraz / Syrah (19%)

Country of origin consumption
1 - Germany (77%)
2 - France (52%)
3 - Italy (50%)
4 - Spain (37%)
5 - South Africa (19%)

Region of origin consumption
1 - Bordeaux (26% vs. 22% ROWD)
2 - Rheinhessen (21%)
3 - Mosel (19%)
4 - Pfalz (18%)
5 - Baden (16%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Aldi – shopper profile

- 77% (vs. 26% ROWD*) state that the wine assortment at Aldi is right for people like them
- 35% are Aldi Promoters

Base= Those who selected Aldi as one of their three main wine buying stores (n=380)

Who they are:

- 41% male
- 59% female

AGE

- 17% 18-34
- 32% (vs. 38% ROWD) 35-54
- 50% 55 and over

- 10% (vs. 6% ROWD) drink wine most days/every day
- 26% drink wine 2-5 times a week
- 36% drink wine about once a week
- 29% drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 29% low involvement
- 41% medium involvement
- 30% high involvement

Wine attitude

- 40% enjoy trying new and different styles of wine
- 10% don't mind what they buy so long as the price is right
- 51% know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Wine that matches or compliments food (79%)
2 - Grape variety (72%)
3 - Taste or wine style descriptions (70%)

Brands purchased

Blanchet (18%)
Erben (12%)
Gallo (9%)
J.P. Chenet (9%)
Die Jungen Frank'n (8%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.4
With an informal meal at home	3.4
With a more formal dinner party at home	1.4
At a party / celebration at home	1.5

What they drink:

Grape varieties – white

1 - Riesling (49%)
2 - Chardonnay (47%)
3 - Sauvignon Blanc (40% vs. 32%)
4 - Pinot Grigio / Pinot Gris (37%)
5 - Müller-Thurgau (30%)

Grape varieties – red

1 - Dornfelder (55% vs. 50% ROWD)
2 - Merlot (53%)
3 - Cabernet Sauvignon (33%)
4 - Pinot Noir (29%)
5 - Shiraz / Syrah (21%)

Country of origin consumption

1 - Germany (79%)
2 - Italy (47%)
3 - France (46%)
4 - Spain (36%)
5 - South Africa (23%)

Region of origin consumption

1 - Bordeaux (22%)
2 - Rheinhessen (22%)
3 - Pfalz (19%)
4 - Mosel (18%)
5 - Württemberg (17%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Kaufland – shopper profile

Kaufland

- 83% (vs. 24% ROWD*) state that the wine assortment at Kaufland is right for people like them
- 42% are Kaufland Promoters

Base= Those who selected Kaufland as one of their three main wine buying stores (n=372)

Who they are:

- 44% male
- 56% female

- 20% 18-34
- 38% 35-54
- 42% 55 and over

- 7% drink wine most days / every day
- 21% drink wine 2-5 times a week
- 39% drink wine about once a week
- 33% drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 29% low involvement
- 43% medium involvement
- 29% high involvement

Wine attitude

- 37% (vs. 42% ROWD) enjoy trying new and different styles of wine
- 14% (vs. 10% ROWD) don't mind what they buy so long as the price is right
- 50% know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Wine that matches or compliments food (78%)
2 - A brand I am aware of (72%)
3 - Taste or wine style descriptions (72%)

Brands purchased

Blanchet (17%)
Erben (15%)
Amselfelder (13% vs. 9% ROWD)
J.P. Chenet (11%)
Mederaño (9%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.3
With an informal meal at home	3.0
With a more formal dinner party at home	1.0 (vs.1.3)
At a party / celebration at home	1.6

What they drink:

Grape varieties – white

1 - Riesling (54%)
2 - Chardonnay (39%)
3 - Müller-Thurgau (33%)
4 - Pinot Grigio / Pinot Gris (28% vs. 34% ROWD)
5 - Sauvignon Blanc (27% vs. 32%)

Grape varieties – red

1 - Dornfelder (55%)
2 - Merlot (53%)
3 - Pinot Noir (31%)
4 - Cabernet Sauvignon (31%)
5 - Tempranillo (14%)

Country of origin consumption

1 - Germany (74%)
2 - France (49%)
3 - Italy (45%)
4 - Spain (32%)
5 - South Africa (16%)

Region of origin consumption

1 - Bordeaux (24%)
2 - Württemberg (21% vs. 16%)
3 - Mosel (20%)
4 - Pfalz (18%)
5 - Rheinhessen (17%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Lidl – shopper profile

- 77% (vs. 25% ROWD*) state that the wine assortment at Lidl is right for people like them
- 29% are Lidl Promoters

Base= Those who selected Lidl as one of their three main wine buying stores (n=349)

Who they are:

- 40% male
- 60% female

- 19% 18-34
- 34% 35-54
- 47% 55 and over

- 8% drink wine most days / every day
- 29% drink wine 2-5 times a week
- 33% drink wine about once a week
- 30% drink wine 1-3 times a month

Wine attitude:

Wine involvement
- 30% low involvement
- 42% medium involvement
- 28% high involvement

Wine attitude
- 42% enjoy trying new and different styles of wine
- 12% don't mind what they buy so long as the price is right
- 46% know what they like and tend to stick to it

Wine purchases:

Choice cues
1 - Wine that matches or compliments food (74%)
2 - A brand I am aware of (67%)
3 - Taste or wine style descriptions (66%)

Brands purchased
Blanchet (17%)
Erben (13%)
J.P. Chenet (11%)
Amselfelder (10%)
Deutsches Weintor (10%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.6
With an informal meal at home	3.7
With a more formal dinner party at home	1.7 (vs.1.3)
At a party / celebration at home	1.7

What they drink:

Grape varieties – white
1 - Riesling (48%)
2 - Chardonnay (45%)
3 - Sauvignon Blanc (35%)
4 - Müller-Thurgau (34%)
5 - Pinot Grigio / Pinot Gris (34%)

Grape varieties – red
1 - Dornfelder (53%)
2 - Merlot (48%)
3 - Cabernet Sauvignon (36%)
4 - Pinot Noir (27%)
5 - Shiraz / Syrah (21%)

Country of origin consumption
1 - Germany (78%)
2 - Italy (48%)
3 - France (47%)
4 - Spain (37%)
5 - South Africa (21%)

Region of origin consumption
1 - Bordeaux (22%)
2 - Mosel (19%)
3 - Pfalz (19%)
4 - Rheinhessen (18%)
5 - Baden (18% vs. 14% ROWD)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Real – shopper profile

- 77% (vs. 19% ROWD*) state that the wine assortment at Real is right for people like them
- 37% are Real Promoters

Base= Those who selected Real as one of their three main wine buying stores (n=241)

Who they are:

- 44% male
- 56% female

- 22% (vs. 16% ROWD) 18-34
- 39% 35-54
- 38% (vs. 46% ROWD) 55 and over

- 4% drink wine most days / every day
- 26% drink wine 2-5 times a week
- 38% drink wine about once a week
- 33% drink wine 1-3 times a month

Wine attitude:

Wine involvement
- 24% low involvement
- 44% medium involvement
- 32% high involvement

Wine attitude
- 54% (vs. 42% ROWD) enjoy trying new and different styles of wine
- 7% don't mind what they buy so long as the price is right
- 39% (vs. 48% ROWD) know what they like and tend to stick to it

Wine purchases:

Choice cues
1 - Wine that matches or compliments food (77%)
2 - Taste or wine style descriptions (73%)
3 - The region of origin (72%)

Brands purchased
Blanchet (20%)
Erben (17% vs. 12% ROWD)
J.P. Chenet (12%)
Gallo (11%)
Amselfelder (11%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.0
With an informal meal at home	2.9
With a more formal dinner party at home	1.6
At a party / celebration at home	2.1 (vs.1.6)

What they drink:

Grape varieties – white
1 - Riesling (45%)
2 - Chardonnay (42%)
3 - Müller-Thurgau (34%)
4 - Sauvignon Blanc (32%)
5 - Pinot Grigio / Pinot Gris (30%)

Grape varieties – red
1 - Merlot (54%)
2 - Dornfelder (53%)
3 - Cabernet Sauvignon (34%)
4 - Pinot Noir (31%)
5 - Zinfandel (16%)

Country of origin consumption
1 - Germany (71%)
2 - France (50%)
3 - Italy (45%)
4 - Spain (36%)
5 - South Africa (21%)

Region of origin consumption
1 - Bordeaux (25%)
2 - Württemberg (20%)
3 - Rheinhessen (19%)
4 - Mosel (17%)
5 - Baden (17%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Netto – shopper profile

- 73% (vs. 14% ROWD*) state that the wine assortment at Netto is right for people like them
- 31% are Netto Promoters

Base= Those who selected Netto as one of their three main wine buying stores (n=199)

Who they are:

- 41% male
- 59% female

- 14% 18-34
- 34% 35-54
- 52% 55 and over

- 10% drink wine most days / every day
- 26% drink wine 2-5 times a week
- 33% drink wine about once a week
- 32% drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 35% (vs. 28% ROWD) low involvement
- 45% medium involvement
- 21% (vs. 30% ROWD) high involvement

Wine attitude

- 36% enjoy trying new and different styles of wine
- 16% (vs. 10% ROWD) don't mind what they buy so long as the price is right
- 48% know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Wine that matches or compliments food (76%)
2 - Taste or wine style descriptions (70%)
3 - A brand I am aware of (69%)

Brands purchased

Blanchet (19%)
Erben (14%)
Amselfelder (11%)
Le Sweet Filou (11% vs. 7% RWD)
J.P. Chenet (11%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.8
With an informal meal at home	3.5
With a more formal dinner party at home	1.6
At a party / celebration at home	2.1 (vs.1.6)

What they drink:

Grape varieties – white

1 - Riesling (46%)
2 - Müller-Thurgau (37%)
3 - Chardonnay (34% vs. 43%)
4 - Sauvignon Blanc (23% vs. 32%)
5 - Pinot Grigio / Pinot Gris (22% vs. 34% ROWD)

Grape varieties – red

1 - Dornfelder (57% vs. 50% ROWD)
2 - Merlot (51%)
3 - Cabernet Sauvignon (29%)
4 - Pinot Noir (17% vs. 32% ROWD)
5 - Tempranillo (16%)

Country of origin consumption

1 - Germany (72%)
2 - Italy (46%)
3 - France (38% vs. 47% ROWD)
4 - Spain (33%)
5 - South Africa (15%)

Region of origin consumption

1 - Rheinhessen (19%)
2 - Mosel (17%)
3 - Bordeaux (17%)
4 - Franken (13%)
5 - Württemberg (12%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Jacques´ Weindepot – shopper profile

- 92% (vs. 14% ROWD*) state that the wine assortment at Jacques´ Weindepot is right for people like them
- 69% are Jacques´ Weindepot Promoters

Base= Those who selected Jacques' Weindepot as one of their three main wine buying stores (n=183)

Who they are:

- 47% male
- 53% female

- 13% 18-34
- 47% (vs. 38% ROWD) 35-54
- 41% 55 and over

- 8% drink wine most days / every day
- 37% (vs. 25% ROWD) drink wine 2-5 times a week
- 36% drink wine about once a week
- 20% (vs. 33% ROWD) drink wine 1-3 times a month

Wine attitude:

Wine involvement
- 11% (vs. 28% ROWD) low involvement
- 36% medium involvement
- 53% (vs. 30% ROWD) high involvement

Wine attitude
- 60% (vs. 42% ROWD) enjoy trying new and different styles of wine
- 5% (vs. 10% ROWD) don't mind what they buy so long as the price is right
- 35% (vs. 48% ROWD) know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Grape variety (87% vs. 71% ROWD)
2 - Wine that matches or compliments food (87% vs. 76% RWD)
3 - The region of origin (79% vs. 71% ROWD)

Brands purchased

Blanchet (23% vs. 16% ROWD)
Gallo (22% vs. 8% ROWD)
Deutsches Weintor (18% vs. 8% ROWD)
Torres (14% vs. 5% ROWD)
Erben (12%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	7.6 (vs.6.1)
With an informal meal at home	5.0 (vs.3.2)
With a more formal dinner party at home	2.0 (vs.1.3)
At a party / celebration at home	2.0 (vs.1.6)

What they drink:

Grape varieties – white

1 - Riesling (64% vs. 51% ROWD)
2 - Chardonnay (58% vs. 43%)
3 - Sauvignon Blanc (55% vs. 32%)
4 - Pinot Grigio / Pinot Gris (52% vs. 34% ROWD)
5 - Müller-Thurgau (42% vs. 33%)

Grape varieties – red

1 - Merlot (75% vs. 52% ROWD)
2 - Pinot Noir (56% vs. 32% ROWD)
3 - Cabernet Sauvignon (51% vs. 34% ROWD)
4 - Dornfelder (49%)
5 - Shiraz / Syrah (39% vs. 18%)

Country of origin consumption

1 - Germany (81%)
2 - France (68% vs. 47% ROWD)
3 - Italy (62% vs. 47% ROWD)
4 - Spain (51% vs. 35% ROWD)
5 - South Africa (32% vs. 19%)

Region of origin consumption

1 - Bordeaux (36% vs. 22% ROWD)
2 - Mosel (26% vs. 18% ROWD)
3 - Rioja (26% vs. 15% ROWD)
4 - Pfalz (25% vs. 17% ROWD)
5 - Rheinhessen (21%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Penny – shopper profile

- 65% (vs. 10% ROWD*) state that the wine assortment at Penny is right for people like them
- 20% are Penny Promoters

Base= Those who selected Penny as one of their three main wine buying stores (n=132)

Who they are:

- 40% male
- 58% female

- 17% 18-34
- 40% 35-54
- 42% 55 and over

- 14% (vs. 6% ROWD) drink wine most days / every day
- 32% drink wine 2-5 times a week
- 32% drink wine about once a week
- 23% (vs. 23% ROWD) drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 28% low involvement
- 47% medium involvement
- 25% high involvement

Wine attitude

- 40% enjoy trying new and different styles of wine
- 16% (vs. 10% ROWD) don't mind what they buy so long as the price is right
- 44% know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Wine that matches or compliments food (78%)
2 - The region of origin (74%)
3 - The country of origin (73%)

Brands purchased

Blanchet (23%)
Erben (18% vs. 12% ROWD)
J.P. Chenet (14%)
Amselfelder (13%)
Mederaño (11% vs. 7% ROWD)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	7.9 (vs. 6.1)
With an informal meal at home	4.2 (vs. 3.2)
With a more formal dinner party at home	1.6
At a party / celebration at home	2.0

What they drink:

Grape varieties – white

1 - Riesling (49%)
2 - Chardonnay (45%)
3 - Müller-Thurgau (35%)
4 - Pinot Grigio / Pinot Gris (33%)
5 - Sauvignon Blanc (28%)

Grape varieties – red

1 - Dornfelder (54%)
2 - Merlot (44%)
3 - Cabernet Sauvignon (40%)
4 - Pinot Noir (28%)
5 - Shiraz / Syrah (23%)

Country of origin consumption

1 - Germany (75%)
2 - France (51%)
3 - Italy (42%)
4 - Spain (38%)
5 - South Africa (19%)

Region of origin consumption

1 - Bordeaux (26%)
2 - Rheinhessen (21%)
3 - Pfalz (20%)
4 - Mosel (18%)
5 - Württemberg (17%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Marktkauf – shopper profile

- **72% (vs. 10% ROWD*) state that the wine assortment at Marktkauf is right for people like them**
- **39% are Marktkauf Promoters**

Base= Those who selected Marktkauf as one of their three main wine buying stores (n=76)

Who they are:

- 44% male
- 56% female

- 21% 18-34
- 38% 35-54
- 46% 55 and over

- 4% drink wine most days / every day
- 25% drink wine 2-5 times a week
- 40% drink wine about once a week
- 31% drink wine 1-3 times a month

Wine attitude:

Wine involvement
- 27% low involvement
- 42% medium involvement
- 31% high involvement

Wine attitude
- 33% enjoy trying new and different styles of wine
- 14% don't mind what they buy so long as the price is right
- 54% know what they like and tend to stick to it

Wine purchases:

Choice cues
1 - Grape variety (79%)
2 - Wine that matches or compliments food (75%)
3 - The country of origin (74%)

Brands purchased
Blanchet (28% vs. 16% ROWD)
Amselkeller (12% vs. 5% ROWD)
Erben (12%)
Deutsches Weintor (11%)
Die Jungen Frank'n (9%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	5.2
With an informal meal at home	4.2
With a more formal dinner party at home	1.2
At a party / celebration at home	2.1

What they drink:

Grape varieties – white
1 - Riesling (52%)
2 - Müller-Thurgau (41%)
3 - Chardonnay (40%)
4 - Pinot Grigio / Pinot Gris (34%)
5 - Sauvignon Blanc (28%)

Grape varieties – red
1 - Dornfelder (59%)
2 - Merlot (55%)
3 - Cabernet Sauvignon (30%)
4 - Pinot Noir (29%)
5 - Shiraz / Syrah (14%)

Country of origin consumption
1 - Germany (79%)
2 - Italy (49%)
3 - France (43%)
4 - Spain (31%)
5 - South Africa (17%)

Region of origin consumption
1 - Mosel (28% vs. 18%)
2 - Rheinhessen (22%)
3 - Württemberg (20%)
4 - Bordeaux (16%)
5 - Franken (16%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Norma – shopper profile

- 64% (vs. 6% ROWD*) state that the wine assortment at Norma is right for people like them
- 27% are Norma Promoters

Base= Those who selected Norma as one of their three main wine buying stores (n=59)

Who they are:

- 55% male
- 45% female

- 19% 18-34
- 30% 35-54
- 51% 55 and over

- 5% drink wine most days / every day
- 31% drink wine 2-5 times a week
- 32% drink wine about once a week
- 33% drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 29% low involvement
- 45% medium involvement
- 26% high involvement

Wine attitude

- 41% enjoy trying new and different styles of wine
- 27% (vs. 10% ROWD) don't mind what they buy so long as the price is right
- 33% (vs. 48% ROWD) know what they like and tend to stick to it

Wine purchases:

Choice cues

1 – Grape variety (74%)
2 – Wine that matches or compliments food (69%)
3 – Country of origin (65%)

Brands purchased

- Die Jungen Frank'n (17% vs. 8% ROWD)
- Amselfelder (14%)
- Blanchet (11%)
- Erben (11%)
- Le Sweet Filou (9%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.5
With an informal meal at home	3.9
With a more formal dinner party at home	2.0
At a party / celebration at home	2.1

What they drink:

Grape varieties – white

1 - Chardonnay (44%)
2 - Müller-Thurgau (41%)
3 - Riesling (39%)
4 – Pinot Grigio / Pinot Gris (35%)
5 - Sauvignon Blanc (33%)

Grape varieties – red

1 - Merlot (51%)
2 - Dornfelder (47%)
3 - Cabernet Sauvignon (41%)
4 – Pinot Noir (36%)
5 - Shiraz / Syrah (23%)

Country of origin consumption

1 - Germany (75%)
2 - Italy (64% vs. 47% ROWD)
3 - France (60%)
4 - Spain (35%)
5 - Austria (31% vs. 16% ROWD)

Region of origin consumption

1 - Franken (32% vs. 13% ROWD)
2 - Bordeaux (27%)
3 - Pfalz (17%)
4 - Côtes du Rhône (15% vs. 7%)
5 - Baden (14%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Galeria Kaufhof – shopper profile

- 71% (vs. 9% ROWD*) state that the wine assortment at Galeria Kaufhof is right for people like them
- 44% are Galeria Kaufhof Promoters

Base= Those who selected Galeria Kaufhof as one of their three main wine buying stores (n=56)

Who they are:

- 38% male
- 62% female

- 30% (vs. 16% ROWD) 18-34
- 46% 35-54
- 24% (vs. 46% ROWD) 55 and over

- 4% drink wine most days / every day
- 37% (vs. 25% ROWD) drink wine 2-5 times a week
- 39% drink wine about once a week
- 20% (vs. 33% ROWD) drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 17% low involvement
- 39% medium involvement
- 44% (vs. 30% ROWD) high involvement

Wine attitude

- 57% (vs. 42% ROWD) enjoy trying new and different styles of wine
- 8% don't mind what they buy so long as the price is right
- 35% know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Wine that matches or compliments food (91% vs. 76%)
2 – Taste or wine style descriptions (80%)
3 – Grape variety (78%)

Brands purchased

Gallo (17% vs. 8% ROWD)
J.P. Chenet (17% vs. 9% ROWD)
Blanchet (15%)
Erben (13%)
Deutsches Weintor (12%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	7.5
With an informal meal at home	4.0
With a more formal dinner party at home	1.8
At a party / celebration at home	2.5 (vs. 1.6)

What they drink:

Grape varieties – white

1 - Riesling (61%)
2 - Chardonnay (46%)
3 - Sauvignon Blanc (45% vs. 32%)
4 – Pinot Grigio / Pinot Gris (42%)
5 – Müller-Thurgau (33%)

Grape varieties – red

1 - Merlot (50%)
2 - Cabernet Sauvignon (45%)
3 – Dornfelder (38%)
4 – Pinot Noir (34%)
5 – Tempranillo (28% vs. 16%)

Country of origin consumption

1 - Germany (69%)
2 - France (50%)
3 - Italy (43%)
4 - Spain (35%)
5 - South Africa (25%)

Region of origin consumption

1 - Pfalz (23%)
2 - Bordeaux (23%)
3 - Baden (21%)
4 - Mosel (21%)
5 - Chianti (20% vs. 11% ROWD)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Globus – shopper profile

- 81% (vs. 7% ROWD*) state that the wine assortment at Globus is right for people like them
- 56% are Globus Promoters

Base= Those who selected Globus as one of their three main wine buying stores (n=56)

Who they are:

- 48% male
- 52% female

- 26% (vs. 16% ROWD) 18-34
- 35% 35-54
- 39% 55 and over

- 10% drink wine most days / every day
- 23% drink wine 2-5 times a week
- 37% drink wine about once a week
- 31% drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 18% low involvement
- 39% medium involvement
- 43% (vs. 30% ROWD) high involvement

Wine attitude

- 55% enjoy trying new and different styles of wine
- 12% don't mind what they buy so long as the price is right
- 33% (vs. 48% ROWD) know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Wine that matches or compliments food (86%)
2 – Country of origin (80% vs. 68% ROWD)
3 – Region of origin (79%)

Brands purchased

- Blanchet (26% vs. 16% ROWD)
- Deutsches Weintor (20% vs. 8%)
- Erben (19%)
- Amselfelder (17% vs. 9%)
- J.P. Chenet (15%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	7.0
With an informal meal at home	4.7 (vs. 3.2)
With a more formal dinner party at home	2.6 (vs. 1.3)
At a party / celebration at home	1.6

What they drink:

Grape varieties – white

1 - Riesling (59%)
2 - Müller-Thurgau (44%)
3 – Chardonnay (40%)
4 - Sauvignon Blanc (40%)
5 – Pinot Grigio / Pinot Gris (32%)

Grape varieties – red

1 - Merlot (49%)
2 - Dornfelder (46%)
3 - Cabernet Sauvignon (38%)
4 – Pinot Noir (35%)
5 – Tempranillo (19%)

Country of origin consumption

1 - Germany (76%)
2 - France (55%)
3 - Spain (54% vs. 35% ROWD)
4 - Italy (47%)
5 - South Africa (21%)

Region of origin consumption

1 - Bordeaux (34% vs. 22% ROWD)
2 - Mosel (27%)
3 - Pfalz (25%)
4 - Rheinhessen (23%)
5 – Saale-Unstrut (19% vs. 5% ROWD)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Metro – shopper profile

METRO

- 60% (vs. 6% ROWD*) state that the wine assortment at Metro is right for people like them
- 60% are Metro Promoters

Base= Those who selected Metro as one of their three main wine buying stores (n=50)

Who they are:

- 50% male
- 50% female

AGE

- 26% 18-34
- 42% 35-54
- 32% (vs. 46%) 55 and over

- 4% drink wine most days / every day
- 29% drink wine 2-5 times a week
- 31% drink wine about once a week
- 37% drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 14% (vs. 28% ROWD) low involvement
- 37% medium involvement
- 49% (vs. 30% ROWD) high involvement

Wine attitude

- 62% (vs. 42% ROWD) enjoy trying new and different styles of wine
- 6% don't mind what they buy so long as the price is right
- 31% (vs. 48% ROWD) know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Wine that matches or compliments food (83%)
2 – Country of origin (74%)
3 – Region of origin (74%)

Brands purchased

Blanchet (28% vs. 16% ROWD)
J.P. CHENET J.P. Chenet (20% vs. 9% ROWD)
DIE JUNGEN FRANK'N Die Jungen Frank'n (19% vs. 8%)
TORRES Torres (14% vs. 5%)
Amselfelder Amselfelder (9%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	7.0
With an informal meal at home	3.7
With a more formal dinner party at home	2.6 (vs. 1.3)
At a party / celebration at home	2.8 (vs. 1.6)

What they drink:

Grape varieties – white

1 - Riesling (54%)
2 - Chardonnay (53%)
3 - Sauvignon Blanc (41%)
4 – Pinot Grigio / Pinot Gris (37%)
5 – Müller-Thurgau (31%)

Grape varieties – red

1 - Merlot (57%)
2 - Dornfelder (52%)
3 - Cabernet Sauvignon (45%)
4 – Pinot Noir (32%)
5 - Shiraz / Syrah (27%)

Country of origin consumption

1 - Germany (86%)
2 - France (51%)
3 - Italy (47%)
4 - Spain (45%)
5 – California - USA (23% vs. 11%)

Region of origin consumption

1 - Bordeaux (30%)
2 - Mosel (24%)
3 - Württemberg (23%)
4 - Rioja (19%)
5 - Pfalz (18%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Hawesko – shopper profile

HAWESKO
Hanseatisches Wein und Sekt Kontor

- 73% (vs. 5% ROWD*) state that the wine assortment at Hawesko is right for people like them
- 57% are Hawesko Promoters

Base= Those who selected Hawesko as one of their three main wine buying stores (n=49)

Who they are:

- 60% (vs. 42% ROWD) male
- 40% (vs. 58% ROWD) female

AGE
- 12% 18-34
- 48% 35-54
- 39% 55 and over

- 9% drink wine most days / every day
- 52% (vs. 25%) drink wine 2-5 times a week
- 25% drink wine about once a week
- 14% (vs. 33%) drink wine 1-3 times a month

Wine attitude:

Wine involvement
- 11% (vs. 28% ROWD) low involvement
- 33% medium involvement
- 56% (vs. 30% ROWD) high involvement

Wine attitude
- 66% (vs. 42% ROWD) enjoy trying new and different styles of wine
- 6% don't mind what they buy so long as the price is right
- 28% (vs. 48% ROWD) know what they like and tend to stick to it

Wine purchases:

Choice cues
1 - Wine that matches or compliments food (88%)
2 – Grape variety (83%)
3 – Region of origin (81%)

Brands purchased
Gallo (20% vs. 8% ROWD)
Badischer Winzerkeller (17% vs. 12%)
Torres (16% vs. 5%)
Antinori (16% vs. 2%)
Blanchet (14%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	9.2 (vs. 6.1)
With an informal meal at home	6.0 (vs. 3.2)
With a more formal dinner party at home	2.4 (vs. 1.3)
At a party / celebration at home	2.0

What they drink:

Grape varieties – white
1 - Chardonnay (69% vs. 43%)
2 - Riesling (61%)
3 - Sauvignon Blanc (57% vs. 32%)
4 – Pinot Grigio / Pinot Gris (55% vs. 34% ROWD)
5 – Grüner Veltliner (36% vs. 18%)

Grape varieties – red
1 - Merlot (64%)
2 - Cabernet Sauvignon (58% vs. 34%)
3 - Pinot Noir (47% vs. 32% ROWD)
4 - Shiraz / Syrah (45% vs. 18%)
5 – Dornfelder (40%)

Country of origin consumption
1 - Italy (75% vs. 47% ROWD)
2 - Germany (65%)
3 - France (63% vs. 47% ROWD)
4 - Spain (57% vs. 35% ROWD)
5 - South Africa (32% vs. 19%)

Region of origin consumption
1 - Rioja (34% vs. 15% ROWD)
2 - Bordeaux (32%)
3 - Rheinhessen (28%)
4 - Chianti (26% vs. 11%)
5 - Medoc (20% vs. 5% ROWD)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Karstadt – shopper profile

KARSTADT

- **61% (vs. 7% ROWD*) state that the wine assortment at Karstadt is right for people like them**
- **37% are Karstadt Promoters**

Base= Those who selected Karstadt as one of their three main wine buying stores (n=35)

Who they are:

- 52% male
- 48% female

- 13% 18-34
- 55% (vs. 38% ROWD) 35-54
- 31% 55 and over

- 5% drink wine most days / every day
- 43% (vs. 25% ROWD) drink wine 2-5 times a week
- 19% (vs. 35% ROWD) drink wine about once a week
- 33% drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 16% low involvement
- 40% medium involvement
- 44% high involvement

Wine attitude

- 46% enjoy trying new and different styles of wine
- 19% don't mind what they buy so long as the price is right
- 35% know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Wine that matches or compliments food (85%)
2 – Region of origin (82%)
3 - Taste or wine style descriptions (80%)

Brands purchased

Blanchet (16%)
Medinet (12% vs. 4% ROWD)
Amselfelder (12%)
J.P. Chenet (11%)
Moselland (11%)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.4
With an informal meal at home	4.3
With a more formal dinner party at home	1.4
At a party / celebration at home	1.8

What they drink:

Grape varieties – white

1 – Sauvignon Blanc (57% vs. 32%)
2 - Riesling (50%)
3 - Chardonnay (48%)
4 - Müller-Thurgau (31%)
5 – Grüner Veltliner (31% vs. 18%)

Grape varieties – red

1 - Merlot (63%)
2 - Cabernet Sauvignon (41%)
3 – Dornfelder (35%)
4 - Shiraz / Syrah (26%)
5 – Pinot Noir (25%)

Country of origin consumption

1 - Germany (64%)
2 - Italy (54%)
3 - Spain (52% vs. 35% ROWD)
4 - France (46%)
5 – Austria (20%)

Region of origin consumption

1 - Bordeaux (27%)
2 - Champagne (27% vs. 7% ROWD)
3 - Chianti (25% vs. 11% ROWD)
4 - Rioja (20%)
5 - Mosel (19%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Mövenpick Weinkeller – shopper profile

MÖVENPICK WEIN

- 65% (vs. 6% ROWD*) state that the wine assortment at Mövenpick is right for people like them
- 55% are Mövenpick Promoters

Base= Those who selected Mövenpick Weinkeller as one of their three main wine buying stores (n=34)

Who they are:

- 52% male
- 48% female

- 18% 18-34
- 53% 35-54
- 29% 55 and over

- 11% drink wine most days / every day
- 57% (vs. 25% ROWD) drink wine 2-5 times a week
- 20% drink wine about once a week
- 11% (vs. 33% ROWD) drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 10% (vs. 28% ROWD) low involvement
- 51% medium involvement
- 39% high involvement

Wine attitude

- 62% (vs. 42% ROWD) enjoy trying new and different styles of wine
- 16% don't mind what they buy so long as the price is right
- 21% (vs. 48% ROWD) know what they like and tend to stick to it

Wine purchases:

Choice cues

1 - Grape variety (77%)
2 – Region of origin (77%)
3 – Country of origin (77%)

Brands purchased

Amselfelder (28% vs. 9% ROWD)
Casillero del Diablo (16% vs. 4% ROWD)
Gallo (16%)
Moselland (15% vs. 6% ROWD)
Torres (15% vs. 5% ROWD)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	7.9
With an informal meal at home	5.3 (vs. 3.2)
With a more formal dinner party at home	3.3 (vs. 1.3)
At a party / celebration at home	2.1

What they drink:

Grape varieties – white

1 - Riesling (48%)
2 – Chardonnay (48%)
3 - Sauvignon Blanc (47%)
4 - Müller-Thurgau (40%)
5 – Pinot Grigio / Pinot Gris (32%)

Grape varieties – red

1 - Dornfelder (51%)
2 – Pinot Noir (47%)
3 – Merlot (44%)
4 - Cabernet Sauvignon (42%)
5 - Carménère (25% vs. 4% ROWD)

Country of origin consumption

1 - Germany (62%)
2 - Italy (54%)
3 - Spain (46%)
4 - France (45%)
5 – Portugal (18%)

Region of origin consumption

1 - Rioja (27% vs. 15% ROWD)
2 - Bordeaux (23%)
3 - Württemberg (22%)
4 - Rheinhessen (21%)
5 - Prosecco (18%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

Vom Fass – shopper profile

- 74% (vs. 6% ROWD*) state that the wine assortment at Vom Fass is right for people like them
- 34% are Vom Fass Promoters

Base= Those who selected Vom Fass as one of their three main wine buying stores (n=28)

Who they are:

- 61% male
- 39% female

- 48% (vs. 16% ROWD) 18-34
- 30% 35-54
- 23% (vs. 46%) 55 and over

- 11% drink wine most days / every day
- 15% drink wine 2-5 times a week
- 32% drink wine about once a week
- 42% drink wine 1-3 times a month

Wine attitude:

Wine involvement

- 22% low involvement
- 36% medium involvement
- 42% high involvement

Wine attitude

- 62% (vs. 42% ROWD) enjoy trying new and different styles of wine
- 13% don't mind what they buy so long as the price is right
- 25% (vs. 48% ROWD) know what they like and tend to stick to it

Wine purchases:

Choice cues

1 – Country of origin (85% vs. 68% ROWD)
2 – Wine that matches or compliments food (80%)
3 - Recommendation by friend or family (78% vs. 59%)

Brands purchased

Blanchet (33% vs. 16% ROWD)
Erben (26% vs. 12% ROWD)
Amselfelder (19%)
Gallo (18% vs. 8% ROWD)
Yellow Tail (16% vs. 5% ROWD)

Occasions:

Average frequency of off-trade consumption per month	
A relaxing drink at the end of the day	6.2
With an informal meal at home	2.7
With a more formal dinner party at home	2.3
At a party / celebration at home	4.4 (vs. 1.6)

What they drink:

Grape varieties – white

1 - Riesling (59%)
2 - Chardonnay (50%)
3 - Pinot Grigio / Pinot Gris (38%)
4 - Müller-Thurgau (29%)
5 - Sauvignon Blanc (28%)

Grape varieties – red

1 - Merlot (58%)
2 - Dornfelder (42%)
3 - Cabernet Sauvignon (42%)
4 – Tempranillo (23%)
5 – Shiraz / Syrah (22%)

Country of origin consumption

1 - France (60%)
2 - Germany (56% vs. 76% ROWD)
3 - Italy (47%)
4 - Spain (20%)
5 - South Africa (18%)

Region of origin consumption

1 - Mosel (33% vs. 18% ROWD)
2 - Rheinhessen (30%)
3 - Rheingau (23% vs. 10% ROWD)
4 - Pfalz (19%)
5 - Württemberg (18%)

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers
Red / Blue: statistically significantly higher / lower than all ROWD
*ROWD = all regular off-trade wine drinker

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Wine-buying online retailer usage

rewe.de, hawesko.de and lidl.de, a mix of different retailer types (supermarket, specialist and discounter), are the most used online retailers to shop for wine

Wine-buying online retailer usage

% who have used the following online retailers to buy wine in the past 6 months
Base = All German regular wine drinkers, who drink wine in the off-trade (n=2,005)

Rank		Off-trade wine drinkers	Rank		Off-trade wine drinkers
	n=	*2,005*		*n=*	*2,005*
1	Rewe.de	5%	21	Allyouneedfresh.de	1%
2	Hawesko.de	4%	22	Weinco.de (Wein&CO)	1%
3	Lidl.de	4%	23	Norma24.de	1%
4	Vinos.de	4%	24	Gute-weine.de (Lobenbergs)	1%
5	Edeka24.de	3%	25	Shop.netto-online.de	1%
6	Weinfreunde.de	3%	26	Wine-in-black.de	1%
7	Weine.de	3%	27	Bringmeister.de	1%
8	WirWinzer.de	3%	28	Ludwig-von-Kapff.de	1%
9	Real.de	2%	29	Bremer-Weinkolleg.de	1%
10	Galeria-kaufhof.de	2%	30	Belvini.de	0.5%
11	Pallhuber.shop	2%	31	Vinexus.de	0.4%
12	Moevenpick-wein.de	2%	32	Geileweine.de	0.4%
13	Vivino.com	2%	33	Plus.de	0.4%
14	Vomfass.de	1%	34	Schneekloth.de	0.4%
15	Vicampo.de	1%		Other	7%
16	Weinwelt.at	1%		None of these	65%
17	Kölner-Weinkeller.de	1%			
18	Pinard-de-Picard.de	1%			
19	Shop.penny.de	1%			
20	Club-of-wine.de	1%			

Source: Wine Intelligence, Vinitrac® Germany, October ‘18, January ‘19, n=2,005 German regular off-trade wine drinkers

Online retailer promoter score

The specialist online retailer moevenpick-wein.de has the highest share of promoters, followed by the supermarket edeka24.de

Online Retailer Promoter Scores

% who would recommend the retailer with a likelihood of 9 or 10
Base= Those who have bought wine in one of the shops in the past 6 months

Rank		% Promoter
1	Moevenpick-wein.de	66%
2	Edeka24.de	54%
3	Vivino.com	53%
4	Hawesko.de	52%
5	Vicampo	52%
6	Vinos.de	47%
7	Pallhuber.shop	45%
8	Galeria-kaufhof.de	43%
9	WirWinzer.de	41%
10	rewe.de	42%
11	Real.de	36%
12	Weine.de	35%
13	Weinfreunde.de	35%
14	Vomfass.de	34%
15	Lidl.de	27%

Due to small sample sizes this data is not available for all tested online stores

Source: Wine Intelligence, Vinitrac® Germany, October ‘18, January ‘19, n=2,005 German regular off-trade wine drinkers

Retailer net promoter score

Calculation

Base: Main Buyers
(Those who selected one of the stores as one of their three main wine buying stores)

Promoter share
(Those who recommend the store to a friend with a likelihood 9 or 10 on a scale of 1 to 10)

Net Promoter Score (NPS)
(How likely are you to recommend the store to a friend on a scale of 1 to 10, for its wine assortment?)

1	2	3	4	5	6	7	8	9	10
Detractors						Passives		Promoters	

% of Promoters – **% of Detractors** = **Net Promoter Score**

Online retailer net promoter score

Moevenpick-wein.de by far has the highest NPS, followed by vivino.com and edeka24.de

Online Net Promoter Scores

% who would recommend the online retailer with a likelihood of 9 or 10 subtracted by the % who would recommend the online retailer with a likelihood of 1 to 6
Base= Those who have bought wine in one of the shops in the past 6 months

Rank		Net Promoter Score
1	Moevenpick-wein.de	62
2	Vivino.com	41
3	Edeka24.de	40
4	Vicampo	35
5	Hawesko.de	34
6	Vinos.de	33
7	Pallhuber.shop	33
8	WirWinzer.de	28
9	Galeria-kaufhof.de	23
10	rewe.de	21
11	Weine.de	18
12	Weinfreunde.de	16
13	Vomfass.de	11
14	Real.de	9
15	Lidl.de	6

Due to small sample sizes this data is not available for all tested online stores

Source: Wine Intelligence, Vinitrac® Germany, October '18, January '19, n=2,005 German regular off-trade wine drinkers

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Potential from channel and shopper's point of view

Multichannel-Shopper have potential for value growth (I)

€6.9 billion retail price wine

Discount	Supermarket	Specialized trade	Winery
€1.6 billion retail price (wine)	€2.1 billion retail price (wine)	€1.5 billion retail price (wine)	€1.4 billion retail price (wine)

Online / Online for wine (€300 million retail price)

Supermarket- & Discount-Shopper
43% of all regular wine drinkers; 9% buy online

Multichannel-Shopper
44% of all regular wine drinkers, 23% buy online

Wine-Shopper
13% of all regular wine drinkers; 23% buy online

Source: Wine Intelligence / HGU, Representative survey HGU, WI, Nielsen/IRI, GfK, Euromonitor, Trinkweinbilanz; Wine Intelligence, Vinitrac® Germany, July ’17, n=1,000

Potential from channel and shopper's point of view

Multichannel-Shopper have potential for value growth (II)

"Supermarket & Discount -Shopper"

- **... have "lower involvement"** (22% with high involvement)
- **... have an average age**
- ... spend **below-average for wine** (14% > 7 Euro for a glass of wine to relax at the end of the day)

"Multichannel-Shopper"

- **... have "higher invol-vement"** (42% with high involvement)
- **... are younger than the average** (40% are < 40 years old)
- ... spend **average for wine** (24% > 7 Euro for a glass of wine to relax at the end of the day)

"Wine-Shopper"

- **... have "higher invol-vement"** (42% with high involvement)
- **... are older than the average** (58% are > 55 years old)
- ... spend **above-average for wine** (47% > 7 Euro for a glass of wine to relax at the end of the day)

Source: Wine Intelligence, Vinitrac® Germany, July '17, n=1,000

Potential from channel and shopper's point of view

Multichannel-Shopper have potential for value growth (III)

Ready to spend according to occasion (off-trade)

% who typically spend the following amount on a bottle of wine on each occasion

Base = All regular wine drinkers, who drink wine on each occasion

Ready to spend according to occasion (off-trade)		All regular wine drinker	Supermarket-Shopper	Multichannel-Shopper	Wine-Shopper
A relaxing drink at the end of the day at home	Less than € 2.00	4%	7%	2%	3%
	Between € 2.00 and € 2.99	11%	17%	8%	3%
	Between € 3.00 and € 3.99	18%	24%	15%	6%
	Between € 4.00 and € 4.99	21%	20%	24%	16%
	Between € 5.00 and € 6.99	23%	17%	27%	25%
	Between € 7.00 and € 9.99	13%	8%	15%	26%
	Between € 10.00 and € 14.99	6%	4%	6%	15%
	More than € 15	3%	2%	3%	6%

Source: Wine Intelligence, Vinitrac® Germany, July '17, n=1,000

Potential from channel and shopper's point of view

Initial conclusions from the channel and shopper point of view

- *... supermarket and internet become more important as sales channels*
- *... supermarket vs. specialized trade / winery with comparable value share*
- *... online – with focus on specialized trade – with strong growth from small basis*
- ***... "new" generation of multichannel-shopper offers opportunities to excite and has potential for value growth***

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Research methodology

Vinitrac®

- The data for this report was collected in Germany in July 2017, October 2018 and January 2019
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
  - 1,000 German regular wine drinkers (July 2017)
  - 2,005 German regular wine drinkers (October 2018 + January 2019)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-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 German regular wine drinkers in terms of gender, age and region
- The distribution of the sample is shown in the table

Germany			
		Jul '17	Oct '18 + Jan'19
	n=	*1,000*	*2,005*
Gender	Male	43%	42%
	Female	57%	58%
	Total	**100%**	**100%**
Age	18-24	4%	4%
	25-34	12%	12%
	35-44	16%	16%
	45-54	22%	22%
	55-64	30%	29%
	65 and over	17%	17%
	Total	**100%**	**100%**
Region	Baden-Württemberg	15%	15%
	Bayern	17%	17%
	Berlin	4%	4%
	Brandenburg + Mecklenburg-Vorpommern	5%	5%
	Niedersachsen + Bremen	10%	10%
	Schleswig-Holstein + Hamburg	6%	6%
	Hessen	7%	7%
	Nordrhein-Westfalen	19%	19%
	Rheinland-Pfalz + Saarland	6%	6%
	Sachsen +Sachsen-Anhalt +Thüringen	11%	11%
	Total	**100%**	**100%**

Source: Wine Intelligence, Vinitrac® Germany, Jul '17 n=1,000, Oct'18 + Jan'19 n=2,005 German regular wine drinkers

Research methodology

Vinitrac©

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

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3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions

For more information about Wine Intelligence please contact us:

Wine Intelligence
109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ
UK

Telephone: +44 (0)20 7378 1277
Email: info@wineintelligence.com
Web: www.wineintelligence.com
Follow us: