A division of the IWSR Group

Germany

Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

In 2023, the German wine market is seeing a transformative shift as Millennials increasingly embrace wine consumption. Approximately half of the adult population indulges in wine each month, and of this group an impressive 70% drink it weekly, accounting for around 21 million wine drinkers

The surge in Millennial wine consumers has brought about significant changes in the industry. These adventurous individuals display a remarkable willingness to explore diverse wine styles, placing greater importance on wine as part of their lifestyle. This openness to experimentation presents exciting opportunities for brands to introduce innovative and alternative wine types, with the rising interest in natural wine a good example.

However, the market is not without challenges. Economic instability and inflation have led to a rise in wine prices, and as traditional red wine consumption declines, the younger generation's growing preference for cocktails, spirits, and pre-mixed drinks means wine producers will need creative strategies if they are to retain their interest.

In an evolving landscape, adapting to the needs of the Millennial demographic and addressing the impact of inflation on wine prices are both vital for the German wine market. Brands must navigate these economic challenges while catering to the dynamic tastes of the younger generation.

Opportunities

Millennial engagement
Innovation and alternative wine types
Premiumisation

Threats

Economic instability and inflation
Declining traditional wine consumption

Management Summary

Germany Wine Landscapes

2023

Management summary

Key takeaways

1. One third of the adult population drinks wine weekly

2. Wine category experiences declining volumes sold in market

3. Millennials entering the category

4. Changing drinking repertoire

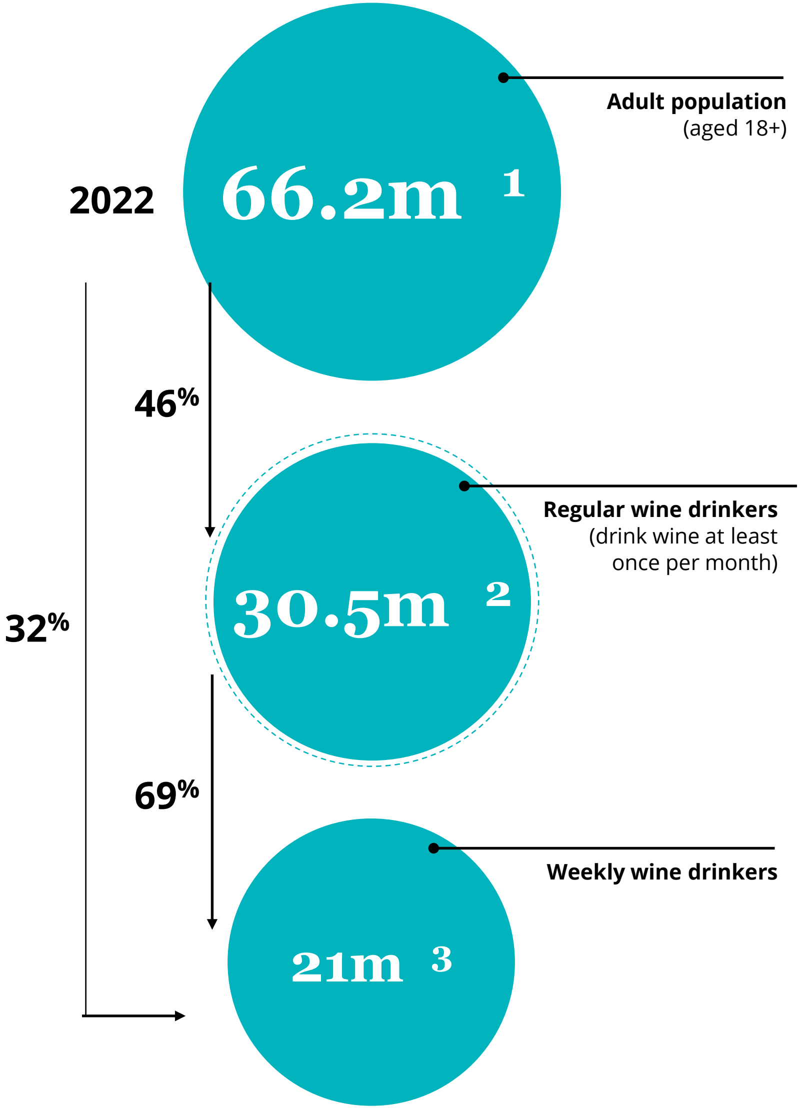
5. Bordeaux is top region in respondent's minds

6. Online shopping struggles after the end of the pandemic

1. One third of the adult population drinks wine weekly

Approximately half of the adult population in Germany drinks wine at least once a month.

More than two thirds of this group are weekly wine drinkers. This accounts for a total of around 21 million individuals



1 DESTATIS
2 Wine Intelligence online calibration study, rolling average of June 2021 and June 2022, (n=3,005) German adults 18+ years. Wine=still light wine (red, white, rosé)
3 Wine Intelligence, Vinitrac® Germany, Jan '23, (n=1,003) German regular wine drinkers

2. Wine category experiences declining volumes sold in market

Between 2017-22 both still and sparkling wine saw their total volumes in the German market decline by -1.8% and -1.2% respectively. Both categories are forecast to continue to decline into the near future, though at a slower rate than previously

Total beverage alcohol market volumes by category

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	1,171,209.35	1,191,299.09	-1.0%	-0.3%
Beer	852,222.21	878,222.26	-1.0%	-0.2%
Wine*	262,735.05	253,971.00	-1.6%	-0.9%
Spirit**	44,236.20	46,251.99	0.2%	0.0%
RTDs	6,627.00	7,220.00	14.9%	5.0%
Cider	5,388.89	5,633.33	1.5%	1.4%

Source: IWSR

* Wine includes Non-Grape Based Wines, Still Wine, Sparkling Wine, Fortified Wine and Light Aperitifs

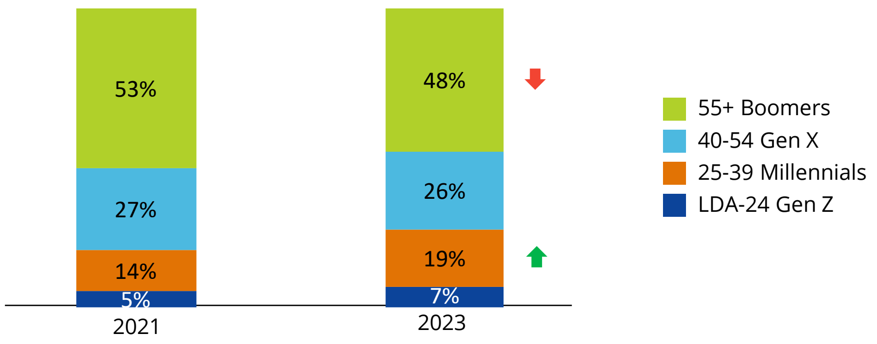
** Spirits include Whisky, Gin and Genever, Vodka, Agave-based Spirits, National Spirits, Rum, Cane, Brandy and Flavoured Spirits

3. Millennials entering the category

There has been a significant increase in the number of Millennials drinking wine on a monthly basis compared to two years ago.

This shift in demographics is expected to bring about a few changes in the German wine industry as Millennials are significantly more adventurous than their counterparts, willing to regularly try new and different styles of wine. They also place a higher importance on wine in their lifestyle

Generation cohorts



Attitudes towards wine by generation

% who ‘agree’ or ‘strongly agree’ with the following statements
Base = All German regular wine drinkers (n=1,003)

	All German Regular Wine Drinkers (n=1,003)	18-24 Gen Z (n=70)	25-39 Millennials (n=189)	40-54 Gen X (n=266)	55+ Boomers (n=478)
I enjoy trying new and different styles of wine on a regular basis	48%	51%	63%	51%	39%
I don't mind what I buy so long as the price is right	13%	30%	17%	15%	8%
I know what I like and I tend to stick to what I know	39%	19%	20%	34%	53%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar’21, Apr’22, Jan’23 (n≥1,003) German regular wine drinkers

4. Changing drinking repertoire

There has been a notable shift in the alcoholic repertoire of German regular wine drinkers, reflecting wider changes in consumption patterns.

Red wine consumption has decreased, while cocktails, spirits and pre-mixed/ready-to-drink alcoholic beverages are growing in popularity, especially among younger consumers

Alcoholic beverage repertoire: Tracking

% who have drunk the following beverages in the past 12 months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Red wine	84%	81%	80%	↓	→
2	White wine	78%	74%	78%	→	→
3	Beer	70%	70%	70%	→	→
4	Sekt	61%	61%	63%	→	→
5	Rosé wine	43%	43%	44%	→	→
6	Liqueurs	39%	38%	40%	→	→
7	Prosecco	36%	37%	37%	→	→
8	Cocktails	25%	27%	35%	↑	↑
9	Whisky / Whiskey	32%	29%	34%	→	↑
10	Gin	25%	23%	29%	→	↑
11=	Vodka	27%	25%	28%	→	→
11=	Champagne (French Champagne)	25%	24%	28%	→	↑
13	Rum	23%	24%	26%	→	→
14	Pre-mixed / ready to drink alcoholic beverages	12%	16%	19%	↑	↑
15	Cider	13%	12%	13%	→	→
16	Brandy / Cognac	15%	11%	12%	→	→
17=	Sweet / dessert wine	11%	10%	11%	→	→
17=	Craft beer	12%	12%	11%	→	→
19	Port	12%	10%	10%	→	→
20	Sherry	10%	9%	9%	→	→

=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

5. Bordeaux is top region in respondent's minds

Bordeaux is thriving as a wine-producing area amongst German regular wine drinkers. While other regions are facing a long-term decrease in awareness, purchase rates of Bordeaux are consistently rising, making it the top region in terms of wine consumption in Germany from a respondent's perspective, even though the volume sold has been declining

Region of origin awareness: Top 5, tracking

% of those who know the following regions produce wine
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Bordeaux	78%	74%	77%	→	→
2	Mosel	78%	74%	73%	↓	→
3	Pfalz	75%	69%	70%	↓	→
4=	Burgundy	73%	70%	68%	↓	→
4=	Rheinhessen	73%	68%	68%	↓	→

Region of origin consumption: Top 5, tracking

% who have bought wine from the following regions in the past three months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Bordeaux	18%	16%	22%	↑	↑
2=	Rheinhessen	20%	16%	18%	→	→
2=	Mosel	19%	18%	18%	→	→
4	Pfalz	19%	17%	17%	→	→
5	Württemberg	16%	15%	15%	→	→

Total still wine volumes and market share by region of origin

'000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR 21-22	Market Share
8	Bordeaux	1,621.24	1,482.00	-3.7%	-8.6%	1%

=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers
Source: IWSR

6. Online shopping struggles after the pandemic

The post-pandemic period has seen a decline in online retailers, indicating a slowdown in the rapid e-commerce growth observed during lockdown restrictions.

The resumption of travel has seen an increase in visits to wineries and shopping trips abroad as consumers seek out more experiential and immersive wine shopping experiences

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	In the supermarket (eg Rewe, Edeka)	**57%**	**57%**	**60%**	→	→
2	From a discounter (eg Aldi, Lidl, Penny, Netto)	**44%**	**45%**	**41%**	→	→
3	In the hyper-market (eg real, Marktkauf, Kaufland, Globus)	**36%**	**35%**	**37%**	→	→
4	From a specialist wine shop	**24%**	**24%**	**27%**	→	→
5	From an online retailer	**20%**	**14%**	**16%**	↓	→
6	From a winery during a visit	**11%**	**14%**	**15%**	↑	→
7	From a winery's website	**12%**	**14%**	**10%**	→	↓
8	Department store (eg Karstadt, Galeria Kaufhof)	**6%**	**11%**	**9%**	↑	→
9	From a supermarket / hypermarket website	**7%**	**7%**	**8%**	→	→
10	Cash & Carry (eg Metro, Selgros)	**6%**	**9%**	**7%**	→	→
11	On shopping trips abroad	**4%**	**7%**	**6%**	↑	→
12	From a convenience store	**4%**	**5%**	**5%**	→	→
13=	From a delivery app	**3%**	**5%**	**4%**	→	→
13=	From Duty Free (eg airports)	**4%**	**5%**	**4%**	→	→
13=	From a wine club or membership organization	**3%**	**5%**	**4%**	→	→

=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Management summary – tracking metrics

The purchase of wines from Italy and France has increased significantly, particularly those from Bordeaux. Most brands, too, are experiencing an increase

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2021	2023	Tracking
Red wine	**84%**	**80%**	↓
White wine	**78%**	**78%**	→
Beer	**70%**	**70%**	→
Sekt	**61%**	**63%**	→
Rosé wine	**43%**	**44%**	→

Top country of origin

% who have drunk wine from the following places in the past six months

	2021	2023	Tracking
Germany	**72%**	**72%**	→
Italy	**45%**	**51%**	↑
France	**40%**	**45%**	↑
Spain	**31%**	**34%**	→
South Africa	**16%**	**16%**	→

Top region of origin

% who have bought wine from the following regions in the past three months

	2021	2023	Tracking
Bordeaux	**18%**	**22%**	↑
Rheinhessen	**20%**	**18%**	→
Mosel	**19%**	**18%**	→
Pfalz	**19%**	**17%**	→
Württemberg	**16%**	**15%**	→

Top wine brands

% who have bought the following brands in the past three months

	2021	2023	Tracking
Rotkäppchen	**25%**	**28%**	→
Blanchet	**14%**	**19%**	↑
Freixenet Mia	**10%**	**16%**	↑
Erben	**7%**	**10%**	↑
Gallo Family Vineyards	**6%**	**9%**	↑

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Jan'23 (n≥1,003) German regular wine drinkers

Management summary – tracking metrics

Online retail has experienced a decline over the past two years, while popular supermarket retailers are gaining market share in the wine retail sector

Top red varietals
% who have drunk the following varietals in the past six months

	2021	2023	Tracking
Merlot	**44%**	**51%**	↑
Dornfelder	**45%**	**39%**	↓
Pinot Noir	**28%**	**33%**	↑
Cabernet Sauvignon	**31%**	**33%**	→
Tempranillo	**15%**	**17%**	→

Top wine-shopping channels
% who have bought wine from the following channels in the past six months

	2021	2023	Tracking
In the supermarket	**57%**	**60%**	→
From a discounter	**44%**	**41%**	→
In the hyper-market	**36%**	**37%**	→
From a specialist wine shop	**24%**	**27%**	→
From an online retailer	**20%**	**16%**	↓

Top white varietals
% who have drunk the following varietals in the past six months

	2021	2023	Tracking
Riesling	**51%**	**50%**	→
Chardonnay	**39%**	**43%**	→
Pinot Grigio / Pinot Gris	**31%**	**36%**	↑
Müller-Thurgau	**30%**	**33%**	→
Sauvignon Blanc	**29%**	**32%**	→

Top wine-buying retailers
% who mainly use the following retailers to buy wine

	2021	2023	Tracking
Rewe / Rewe Center	**24%**	**31%**	↑
Edeka / Neukauf / Aktiv Markt / E-Center	**27%**	**31%**	↑
Kaufland	**19%**	**24%**	↑
Aldi	**19%**	**18%**	→
Lidl	**17%**	**14%**	↓

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Jan'23 (n≥1,003) German regular wine drinkers

Market Data

Germany Wine Landscapes

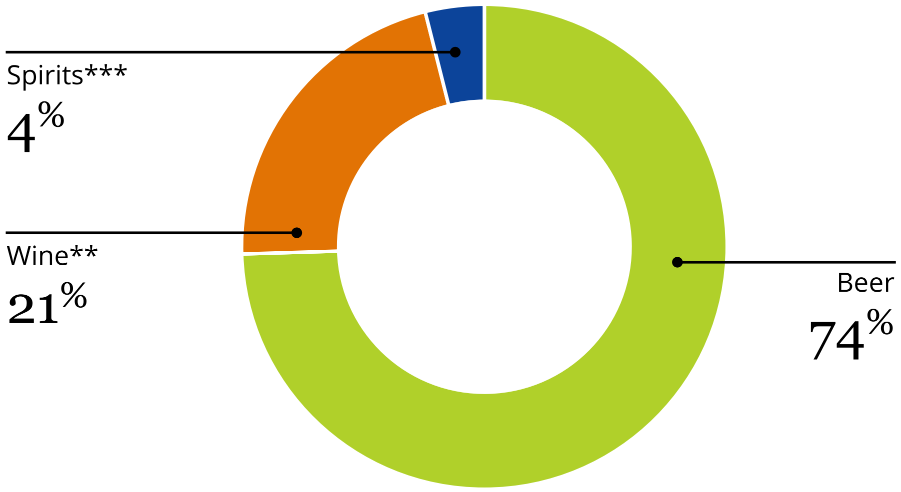
2023

Total beverage alcohol market share by category

The leading categories in the German market - beer and wine - both experienced a decline in their volumes between 2017 and 2022. This trend is forecast to continue, though the rate of decline is expected to slow

Total beverage alcohol market share by category*

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	1,171,209.35	1,191,299.09	-1.0%	-0.3%
Beer	852,222.21	878,222.26	-1.0%	-0.2%
Wine**	262,735.05	253,971.00	-1.6%	-0.9%
Spirit***	44,236.20	46,251.99	0.2%	0.0%
RTDs	6,627.00	7,220.00	14.9%	5.0%
Cider	5,388.89	5,633.33	1.5%	1.4%

Source: IWSR

* Cider and RTDs omitted from pie chart due to low percentage value

** Wine includes Non-Grape Based Wines, Still Wine, Sparkling Wine, Fortified Wine and Light Aperitifs

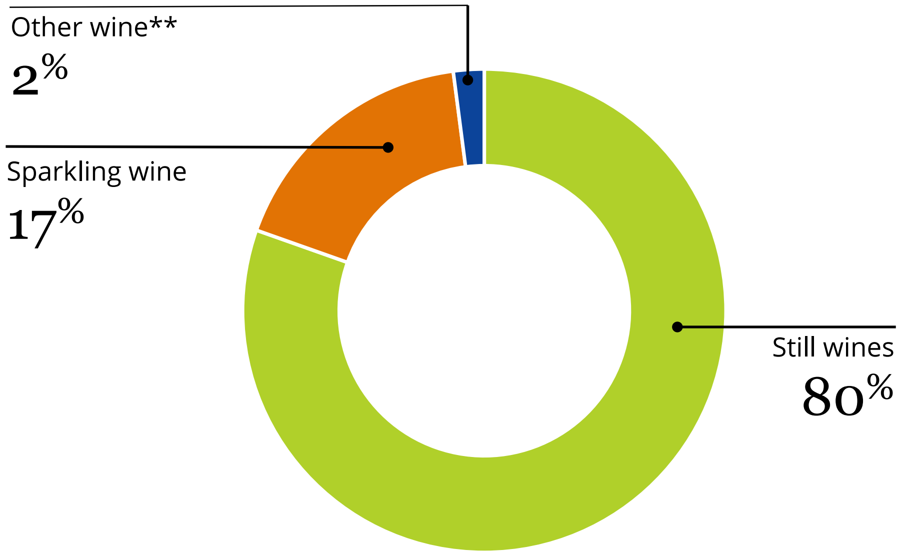
*** Spirits include Whisky, Gin and Genever, Vodka, Agave-based Spirits, National Spirits, Rum, Cane, Brandy and Flavoured Spirits

Total wine market volumes

The still and sparkling wine categories are in decline. Both are expected to contract further in the short term, though the rate of fall is decreasing

Total wine share by category*

% of purchases that fall within the categories below



Total wine volumes by category

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	262,735.05	253,971.00	-1.6%	-0.9%
Still Wine	212,656.00	202,090.00	-1.8%	-1.1%
Sparkling Wine	42,585.55	44,076.00	-1.2%	-0.2%
Other Wines**	5,104.00	5,167.00	-2.0%	0.6%
Light Aperitifs	1,735.00	2,039.00	8.4%	5.2%
Fortified Wine	654.50	599.00	-3.1%	-1.6%

Source: IWSR

*Light Wine and Fortified Wine omitted from pie chart due to low percentage value

**Other Wines includes Non-Grape Based Wines

Still wine volumes by origin

Almost all the leading still wine producing countries have seen volume decreases in Germany

Total still wine volumes and market share by origin

'000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	212,656.00	202,090.00	-1.8%	-1.1%	
1	German	92,441.00	84,955.00	-2.1%	-1.3%	42%
2	Italian	42,005.00	42,030.50	-1.8%	-0.5%	21%
3	Spanish	28,960.00	28,648.00	-0.3%	-0.8%	14%
4	French	20,760.00	18,943.00	-3.8%	-1.4%	9%
5	South African	7,515.00	7,011.85	-1.5%	-1.1%	3%
6	Chilean	3,580.00	3,514.00	-1.2%	-1.5%	2%
7	Australian	2,980.00	2,847.00	-1.5%	-1.8%	1%
8	Austrian	2,480.00	2,444.00	0.0%	-1.0%	1%
9	Macedonian	2,285.00	2,400.50	1.7%	-1.3%	1%
10	US	2,025.00	1,971.00	0.3%	-1.8%	1%

Source: IWSR

Still wine volumes by region of origin

With the exception of Baden and Veneto, all leading regions of origin saw their volumes of wine sold in the German market decline

Total still wine volumes and market share by region of origin

'000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR 21-22	Market Share
	Total	212,656.00	202,090.00	-1.8%	-1.1%	
1	Rheinhessen	25,885.00	21,900.24	-3.4%	-15.4%	11%
2	Pfalz	18,305.00	16,814.59	-4.4%	-8.1%	8%
3	Baden	13,310.00	15,286.35	1.2%	14.8%	8%
4	Mosel	12,755.00	10,987.32	-0.4%	-13.9%	5%
5	Wuerttemberg	9,985.00	10,633.67	-2.1%	6.5%	5%
6	Franken	4,900.00	4,254.69	-7.6%	-13.2%	2%
7	Veneto	3,869.06	3,697.75	11.9%	-4.4%	2%
8	Bordeaux	1,621.24	1,482.00	-3.7%	-8.6%	1%
9	Toscana	1,530.64	1,384.50	-6.5%	-9.5%	1%
10	Rioja	1,615.02	1,335.00	-8.0%	-17.3%	1%

Source: IWSR

Still wine retail price by origin

Almost all countries of origin have experienced an increase in their price points in the German market over the last five years, with Austria the sole exception

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	3.66	1.3%	0.0%
1	German	3.69	1.6%	0.1%
2	Italian	3.54	1.3%	-0.1%
3	Spanish	2.90	0.9%	0.1%
4	French	4.42	1.4%	0.0%
5	South African	3.08	1.2%	0.1%
6	Chilean	5.41	3.1%	-0.2%
7	Australian	4.20	0.2%	0.0%
8	Austrian	5.42	-0.2%	0.0%
9	Macedonian	1.26	0.9%	0.0%
10	US	5.41	0.8%	0.0%

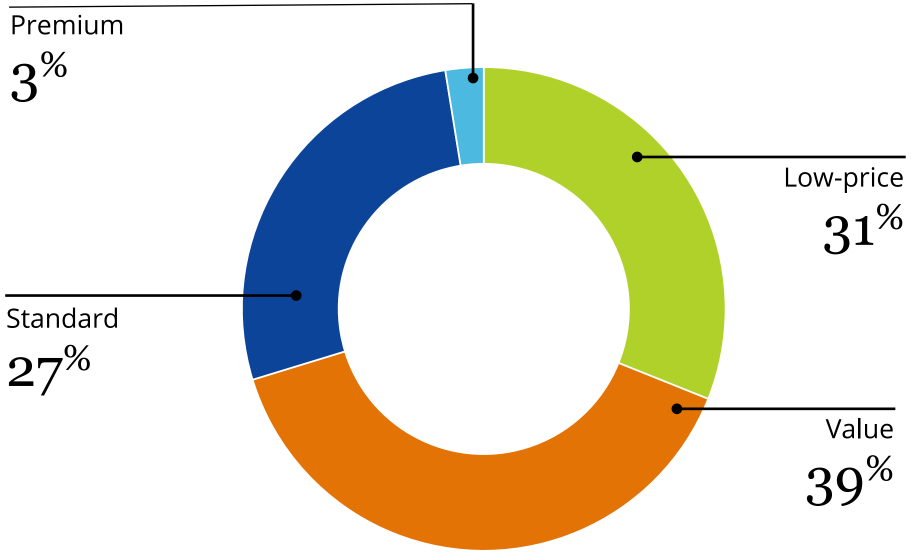
Source: IWSR

Still wine by price band

The decline in volumes in Germany is occurring across all price points

Still wine by price band*

% of purchases that fall within the categories below



Total wine volumes by category

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under €2.50)	64,788.00	62,448.65	-2.6%	-1.2%
Value (between €2.50 and €3.49)	82,126.25	78,805.50	-1.3%	-1.0%
Standard (between €3.50 and €7.49)	58,916.20	54,637.75	-1.3%	-1.1%
Premium (between €7.50 and €14.99)	5,639.05	5,123.75	-2.8%	-2.0%
Super Premium (between €15.00 and €24.99)	691.75	629.45	-4.3%	-1.3%
Ultra Premium (between €25.00 and €39.99)	290.75	260.95	-3.8%	-1.1%
Prestige (over €40.00)	204.00	183.95	-1.7%	-0.6%

Source: IWSR

* Super Premium, Ultra Premium and Prestige omitted from pie chart due to low percentage value

Still wine consumption per capita

Germany is a top 20 market for per capita consumption of still wine, although the level has fallen between 2017-22

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.7	49.0	12.3%	5.0%
2	Portugal	43.0	45.7	-0.9%	6.3%
3	Montenegro	41.8	42.6	-0.9%	2.0%
4	Italy	42.2	39.9	-2.8%	-5.2%
5	Slovenia	37.6	37.8	-2.8%	0.5%
6	St. Barths	33.9	37.2	9.3%	9.8%
7	Switzerland	36.1	34.9	-1.5%	-3.3%
8	France	35.7	33.9	-5.2%	-5.0%
9	Greece	28.0	33.8	0.5%	20.9%
10	Hungary	31.5	32.7	0.6%	3.6%
11	Denmark	33.4	31.0	-1.2%	-7.1%
12=	Austria	30.9	30.1	-1.3%	-2.6%
12=	Turks and Caicos	27.6	30.1	-2.9%	9.2%
14=	Romania	27.5	27.9	2.4%	1.2%
14=	US Virgin Islands	27.8	27.9	-2.6%	0.3%
16	Germany	26.5	25.3	-2.5%	-4.8%
17	Argentina	25.3	24.9	-2.7%	-1.5%
18	Malta	21.2	24.3	-6.4%	14.9%
19=	Uruguay	25.6	23.4	-1.3%	-8.6%
19=	Slovakia	22.9	23.4	-0.1%	1.9%

Source: IWSR

Sparkling wine volumes by origin

Domestic sparkling wine experienced a year-on-year increase but has declined in its home market between 2017-22. Austrian sparkling wine is expected to grow over the next five years

Total sparkling wine volumes and market share by origin

'000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	42,585.55	44,076.00	-1.2%	-0.2%	
1	German	29,737.25	30,936.80	-2.1%	-0.1%	70%
2	Italian	8,380.60	8,557.00	1.9%	-0.7%	19%
3	Spanish	2,391.25	2,451.90	-1.7%	-0.2%	6%
4	French	1,996.25	2,043.70	2.5%	-0.9%	5%
5	Ukrainian	31.00	33.00	1.9%	0.0%	0%
6	Austrian	30.75	32.00	-0.2%	1.8%	0%
7	South African	8.00	8.00	-6.2%	-2.8%	0%
8	International	4.80	6.40	12.8%	-4.2%	0%
9	US	2.25	2.50	-6.5%	-12.9%	0%
10	Hungarian	1.50	2.10	-6.9%	0.9%	0%

*International refers to wine where grapes are from multiple countries of origin

Source: IWSR

Sparkling wine retail price by origin

Almost all countries of origin have experienced an increase to their price points between 2017-22

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a fixed exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	5.34	2.3%	0.2%
1	German	4.38	2.1%	0.0%
2	Italian	5.76	2.9%	0.6%
3	Spanish	6.10	0.3%	0.0%
4	French	16.94	-0.8%	1.1%
5	Ukrainian	12.93	5.4%	0.0%
6	Austrian	12.07	-1.6%	-0.3%
7	South African	6.84	0.2%	0.2%
8	International	6.47	9.0%	-1.5%
9	US	5.43	0.6%	0.0%
10	Hungarian	6.87	4.7%	0.0%

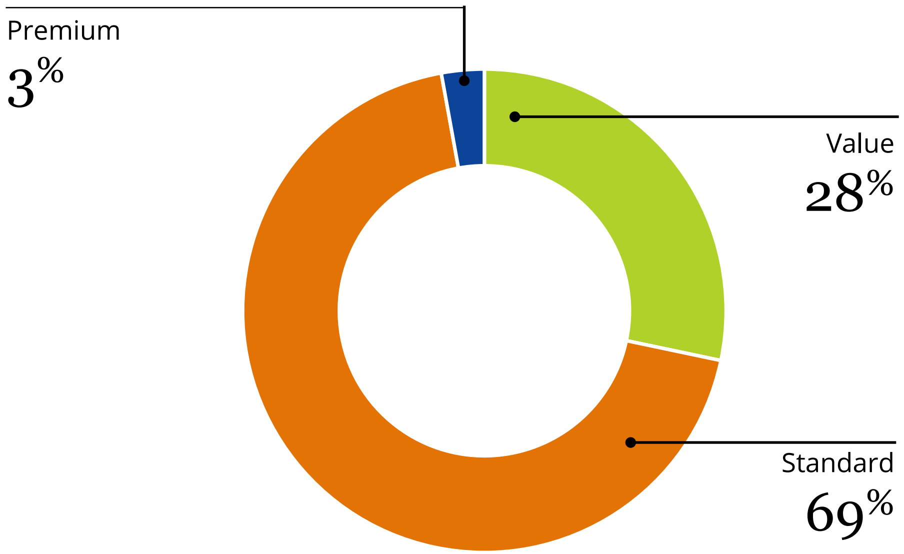
Source: IWSR

Sparkling wine by price band

There is evidence of premiumisation in the sparkling wine market in Germany with an increase in the volumes of bottles sold above €7.50

Sparkling wine by price brand*

% of purchases that fall within the categories below



Sparkling wine volumes by price band

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under €3.49)	11,852.45	12,248.55	-2.7%	-0.8%
Standard (between €3.50 and €7.49)	28,835.75	29,791.35	-0.7%	-0.1%
Premium (between €7.50 and €14.99)	1,133.30	1,238.10	4.3%	0.6%
Super Premium (between €15.00 and €24.99)	24.05	24.80	4.4%	2.4%
Ultra Premium (over €25.00)	n/a	0.20	n/a	7.0%

Note: Sparkling Wine includes all sparkling wine types except Champagne, and includes Low and No sparkling wine types

*Prestige omitted from pie chart due to low percentage value

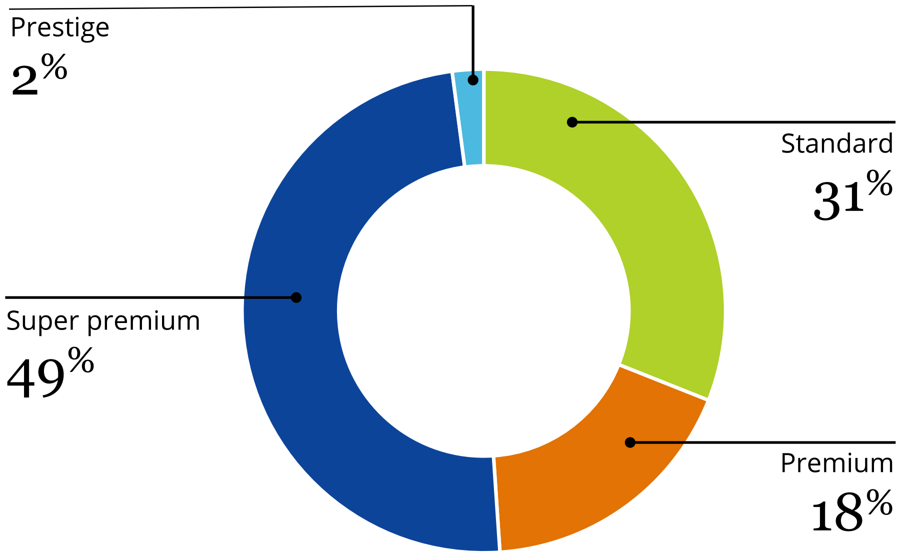
Source: IWSR

Champagne by price band

Champagne is also showing a trend towards premiumisation with the volumes of bottles sold above €35.00 increasing

Champagne by price brand

% of purchases that fall within the categories below



Champagne volumes by price band

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Standard (under €16.00)	224.00	239.80	-6.5%	-2.2%
Premium (between €16.00 and €34.99)	140.25	138.50	-2.2%	-2.3%
Super Premium (between €35.00 and €99.99)	359.75	378.50	2.5%	1.4%
Prestige (over €100.00)	16.00	16.20	1.6%	1.0%

Source: IWSR

Sparkling wine consumption per capita

Germany is a top five country for per capita consumption of sparkling wine, although this metric has declined between 2017-22

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.5	13.6	13.1%	8.9%
2	St. Martin and St. Maarten	6.3	8.3	21.7%	32.6%
3	Italy	7.9	7.4	-1.2%	-6.2%
4	Turks and Caicos	5.3	6.5	-2.4%	23.4%
5	Germany	5.3	5.5	-1.9%	3.7%
6	Lithuania	4.9	5.1	7.3%	3.6%
7=	Latvia	4.5	4.9	2.6%	9.4%
7=	France	4.7	4.9	-1.3%	2.7%
9	Guadeloupe	4.2	4.8	-1.8%	15.5%
10	Martinique	4.2	4.4	-4.6%	4.8%
11=	Estonia	4.1	4.3	4.0%	6.3%
11=	Belgium and Luxembourg	4.3	4.3	-1.5%	-0.2%
13	Austria	3.4	3.5	0.3%	2.9%
14=	Switzerland	3.2	3.3	0.9%	3.0%
14=	Cayman Islands	3.1	3.3	2.1%	5.8%
14=	Sweden	3.3	3.3	6.7%	0.6%
17=	United Kingdom	3.2	3.0	-0.6%	-4.8%
17=	Slovenia	2.9	3.0	3.0%	4.1%
19=	New Zealand	3.1	2.9	-1.6%	-6.1%
19=	Reunion	2.6	2.9	0.7%	14.7%

Source: IWSR

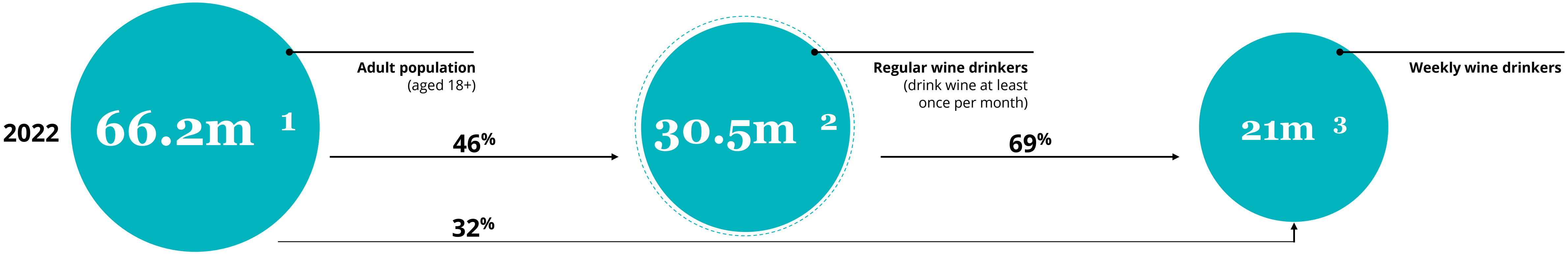
Market Demographics

Germany Wine Landscapes

2023

German regular wine drinkers

Almost half of the adult population in Germany drink wine at least once per month; amongst this group, seven out of ten drink it weekly

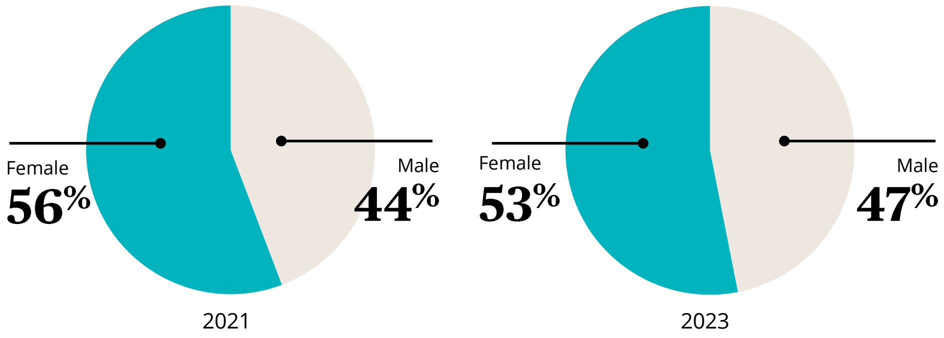


1 DESTATIS
2 Wine Intelligence online calibration study, rolling average of June 2021 and June 2022, (n=3,005) German adults 18+ years. Wine=still light wine (red, white, rosé)
3 Wine Intelligence, Vinitrac® Germany, Jan ‘23, (n=1,003) German regular wine drinkers

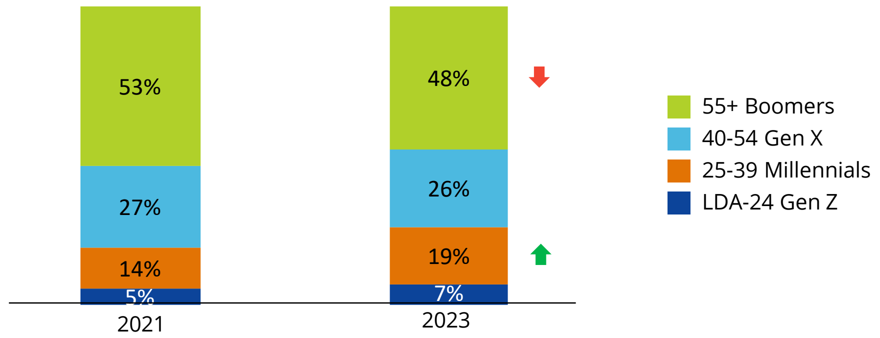
Demographics of regular wine drinkers

A greater proportion of the wine drinking population in Germany is made up of Millennials and high-income households compared to 2021

Gender



Generation cohorts



Regions

	2021	2023	Tracking
Baden-Württemberg	**14%**	**15%**	→
Bayern	**15%**	**16%**	→
Berlin	**3%**	**5%**	→
Hessen	**9%**	**8%**	→
Mecklenburg-Vorpommern + Brandenburg	**5%**	**6%**	→
Niedersachsen + Bremen	**10%**	**9%**	→
Nordrhein-Westfalen	**22%**	**18%**	→
Rheinland-Pfalz + Saarland	**6%**	**6%**	→
Sachsen + Sachsen-Anhalt + Thüringen	**10%**	**12%**	→
Schleswig-Holstein + Hamburg	**5%**	**6%**	→

Annual household income before tax

	2021	2023	Tracking
Less than € 12.000	**5%**	**5%**	→
Between € 12.000 and € 17.999	**6%**	**8%**	→
Between € 18.000 and € 23.999	**8%**	**7%**	→
Between € 24.000 and € 29.999	**11%**	**9%**	→
Between € 30.000 and € 35.999	**10%**	**11%**	→
Between € 36.000 and € 41.999	**10%**	**9%**	→
Between € 42.000 and € 49.999	**8%**	**9%**	→
Between € 50.000 and € 74.999	**16%**	**20%**	↑
More than € 75.000	**15%**	**15%**	→
I would prefer not to answer	**11%**	**6%**	↓

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Germany, Mar '21, Jan '23, (n≥1,003) German regular wine drinkers

Drinking Repertoire

Germany Wine Landscapes

2023

Drinking repertoire

There has been a noticeable shift in the alcoholic repertoire, with clear changes in consumption patterns.

Red wine consumption has declined, while cocktails, spirits and pre-mixed / ready to drink alcoholic beverages are gaining in popularity

Alcoholic beverage repertoire: Tracking

% who have drunk the following beverages in the past 12 months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Red wine	84%	81%	80%	↓	→
2	White wine	78%	74%	78%	→	→
3	Beer	70%	70%	70%	→	→
4	Sekt	61%	61%	63%	→	→
5	Rosé wine	43%	43%	44%	→	→
6	Liqueurs	39%	38%	40%	→	→
7	Prosecco	36%	37%	37%	→	→
8	Cocktails	25%	27%	35%	↑	↑
9	Whisky / Whiskey	32%	29%	34%	→	↑
10	Gin	25%	23%	29%	→	↑
11=	Vodka	27%	25%	28%	→	→
11=	Champagne (French Champagne)	25%	24%	28%	→	↑
13	Rum	23%	24%	26%	→	→
14	Pre-mixed / ready to drink alcoholic beverages	12%	16%	19%	↑	↑
15	Cider	13%	12%	13%	→	→

Market context:

Spirit Aperitifs, RTDs, Agave-based Spirits, and heavily-promoted spirits like Blended Scotch, Vodka, and Gin saw a rise in sales

Executive Summary Report 2023 Germany

=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Varietal consumption

Grape varietal consumption remains stable overall, with long-term increases for Pinot Grigio / Gris, Merlot, and Pinot Noir

White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Riesling	51%	53%	50%	→	→
2	Chardonnay	39%	38%	43%	→	↑
3	Pinot Grigio / Pinot Gris	31%	31%	36%	↑	↑
4	Müller-Thurgau	30%	28%	33%	→	↑
5	Sauvignon Blanc	29%	29%	32%	→	→
6	Grüner Veltliner	17%	18%	17%	→	→
7	Gewürztraminer	16%	15%	15%	→	→
8	Moscato	9%	11%	10%	→	→
9	Chenin Blanc	6%	5%	7%	→	↑
10=	Sémillon	4%	5%	4%	→	→
10=	Torrontés	3%	3%	4%	→	→
12=	Colombard	3%	4%	3%	→	→
12=	Albariño	3%	4%	3%	→	→
12=	Verdejo	5%	3%	3%	↓	→
12=	Viognier	3%	5%	3%	→	↓

Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Merlot	44%	44%	51%	↑	↑
2	Dornfelder	45%	42%	39%	↓	→
3=	Pinot Noir	28%	27%	33%	↑	↑
3=	Cabernet Sauvignon	31%	27%	33%	→	↑
5	Tempranillo	15%	14%	17%	→	→
6	Shiraz / Syrah	18%	16%	16%	→	→
7	Zinfandel	12%	14%	14%	→	→
8	Pinotage	7%	8%	9%	→	→
9=	Sangiovese	9%	9%	7%	→	→
9=	Malbec	6%	7%	7%	→	→
11	Grenache	6%	7%	6%	→	→
12	Carménère	5%	5%	4%	→	→
13	Gamay	3%	4%	3%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

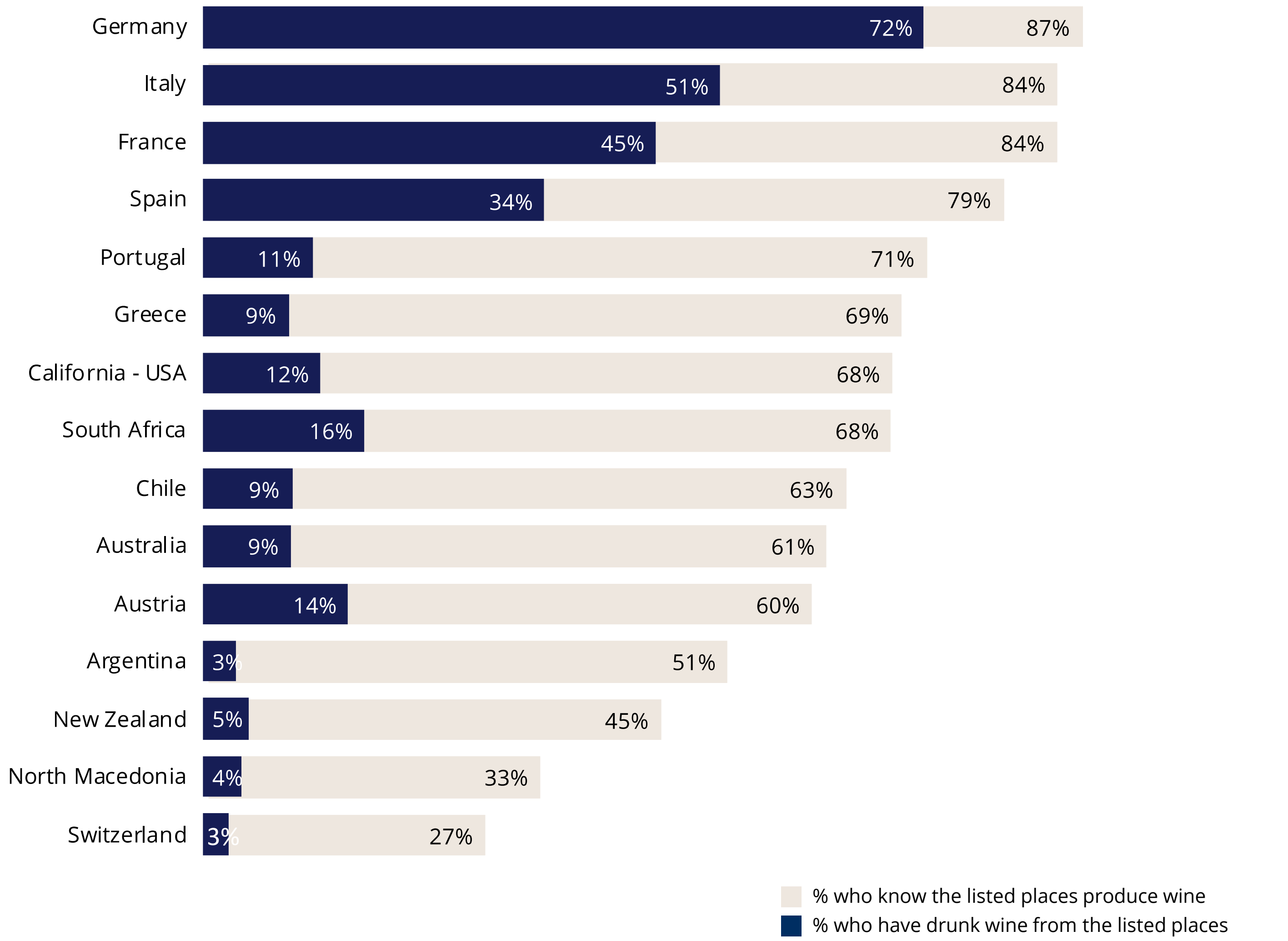
Country of origin awareness / consumption

Wines from the Old World, notably Germany, France, and Italy, have strong awareness and consumption levels.

From the New World, South Africa has the highest levels of consumption and recognition

Country of origin: Top 15 awareness and consumption levels

% of those who know of or have drunk wine from the following places in the past six months
Base = All German regular wine drinkers (n=1,003)



Source: Wine Intelligence, Vinitrac®, Germany, Apr '23, (n=1,003) German regular wine drinkers

Country of origin awareness

Awareness of countries of origin remains stable, with Europe dominating the top six most-known wine producing countries

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Germany	**89%**	**86%**	**87%**	→	→
2=	Italy	**81%**	**83%**	**84%**	→	→
2=	France	**85%**	**82%**	**84%**	→	→
4	Spain	**79%**	**81%**	**79%**	→	→
5	Portugal	**70%**	**70%**	**71%**	→	→
6	Greece	**69%**	**70%**	**69%**	→	→
7=	California - USA	**67%**	**70%**	**68%**	→	→
7=	South Africa	**70%**	**71%**	**68%**	→	→
9	Chile	**64%**	**65%**	**63%**	→	→
10	Australia	**61%**	**64%**	**61%**	→	→
11	Austria	**63%**	**62%**	**60%**	→	→
12	Argentina	**54%**	**55%**	**51%**	→	→
13	New Zealand	**47%**	**46%**	**45%**	→	→
14	North Macedonia	**30%**	**33%**	**33%**	→	→
15	Switzerland	**31%**	**30%**	**27%**	→	→
16	Moldova	**26%**	**26%**	**26%**	→	→
17	Other USA (outside of California)	**22%**	**18%**	**16%**	↓	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Country of origin consumption

While awareness of countries of origin remains stable, there has been a significant increase in consumption of wines from Italy and France following the pandemic

Market context:

Despite the trend towards regional wines, Italian wines managed to avoid significant volume losses in 2022. Their relatively low average prices helped them maintain consumer demand

Executive Summary Report 2023 Germany

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Germany	72%	72%	72%	➡	➡
2	Italy	45%	42%	51%	⬆	⬆
3	France	40%	37%	45%	⬆	⬆
4	Spain	31%	31%	34%	➡	➡
5	South Africa	16%	14%	16%	➡	➡
6	Austria	17%	14%	14%	➡	➡
7	California - USA	9%	9%	12%	➡	➡
8	Portugal	9%	11%	11%	➡	➡
9=	Chile	10%	8%	9%	➡	➡
9=	Australia	9%	8%	9%	➡	➡
9=	Greece	8%	9%	9%	➡	➡
12	New Zealand	4%	4%	5%	➡	➡
13	North Macedonia	3%	4%	4%	➡	➡
14=	Argentina	4%	5%	3%	➡	➡
14=	Switzerland	2%	3%	3%	➡	➡
16	Moldova	2%	2%	2%	➡	➡
17	Other USA (outside of California)	1%	1%	1%	➡	➡

= Represents equal ranking
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

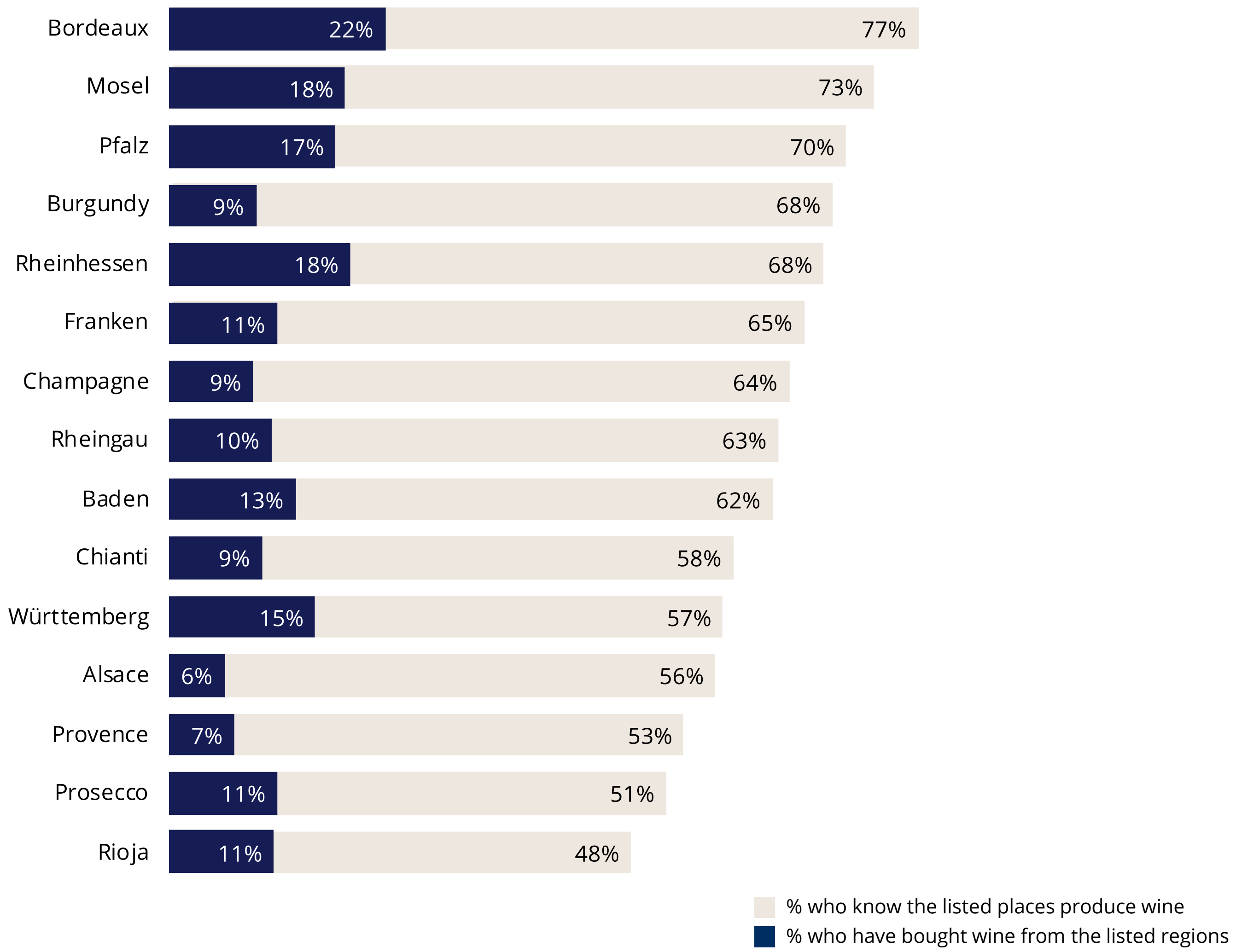
Region of origin awareness / purchase

Among German regular wine drinkers, the highest awareness is for both French and German wine-producing regions.

When it comes to consumption, with the exception of Bordeaux, domestic wine regions have the highest uptake

Region of origin: Top 15 awareness and purchase levels

% of those who know of or have bought wine from the following regions in the past three months
Base = All German regular wine drinkers (n=1,003)



Source: Wine Intelligence, Vinitrac®, Germany, Apr '23, (n=1,003) German regular wine drinkers

Region of origin awareness

In line with a global trend for declining wine knowledge, in Germany there is also a downward shift in awareness of most wine-producing regions. Exceptions are Bordeaux, Württemberg, Prosecco and Rioja which have remained stable

Region of origin awareness: Top 15, tracking

% of those know the following regions produce wine
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Bordeaux	78%	74%	77%	→	→
2	Mosel	78%	74%	73%	↓	→
3	Pfalz	75%	69%	70%	↓	→
4=	Burgundy	73%	70%	68%	↓	→
4=	Rheinhessen	73%	68%	68%	↓	→
6	Franken	70%	62%	65%	↓	→
7	Champagne	71%	65%	64%	↓	→
8	Rheingau	73%	66%	63%	↓	→
9	Baden	70%	64%	62%	↓	→
10	Chianti	63%	59%	58%	↓	→
11	Württemberg	60%	55%	57%	→	→
12	Alsace	62%	56%	56%	↓	→
13	Provence	58%	53%	53%	↓	→
14	Prosecco	55%	54%	51%	→	→
15	Rioja	51%	47%	48%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Region of origin purchase

Despite the declining awareness of wine-producing regions, there has been no immediate impact on purchase behavior.

Bordeaux is the leading wine producing region in Germany, experiencing both short-term and long-term increases in consumption

Market context:

Consumption of wine in Germany is regional, and many Germans prefer to drink their local wines. The trend towards regionalisation and government campaigns promoting local wines has been observed

Executive Summary Report 2023 Germany

Region of origin purchase: Top 15, tracking

% who have bought wine from the following regions in the past three months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Bordeaux	18%	16%	22%	↑	↑
2=	Rheinhessen	20%	16%	18%	→	→
2=	Mosel	19%	18%	18%	→	→
4	Pfalz	19%	17%	17%	→	→
5	Württemberg	16%	15%	15%	→	→
6	Baden	15%	12%	13%	→	→
7=	Prosecco	9%	9%	11%	→	→
7=	Franken	14%	12%	11%	→	→
7=	Rioja	12%	11%	11%	→	→
10	Rheingau	12%	11%	10%	→	→
11=	Chianti	9%	10%	9%	→	→
11=	Burgundy	9%	9%	9%	→	→
11=	Champagne	6%	6%	9%	↑	↑
14=	Sicily	7%	6%	7%	→	→
14=	Côtes du Rhône	6%	4%	7%	→	↑

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Wine-Buying Behaviours

Germany Wine Landscapes

2023

Wine-buying channel usage

The pandemic has influenced channel usage amongst German regular wine drinkers.

Online channels have experienced a decrease, while visits to wineries and shopping trips abroad have increased as travel resumes after the pandemic

Market context:

E-commerce growth in Germany slowed as consumers shifted towards lower-priced alcohol products

Executive Summary Report 2023 Germany

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	In the supermarket	**57%**	**57%**	**60%**	→	→
2	From a discounter	**44%**	**45%**	**41%**	→	→
3	In the hyper-market	**36%**	**35%**	**37%**	→	→
4	From a specialist wine shop	**24%**	**24%**	**27%**	→	→
5	From an online retailer	**20%**	**14%**	**16%**	↓	→
6	From a winery during a visit	**11%**	**14%**	**15%**	↑	→
7	From a winery's website	**12%**	**14%**	**10%**	→	↓
8	Department store	**6%**	**11%**	**9%**	↑	→
9	From a supermarket / hypermarket website	**7%**	**7%**	**8%**	→	→
10	Cash & Carry	**6%**	**9%**	**7%**	→	→
11	On shopping trips abroad	**4%**	**7%**	**6%**	↑	→
12	From a convenience store	**4%**	**5%**	**5%**	→	→
13=	From a delivery app	**3%**	**5%**	**4%**	→	→
13=	From Duty Free	**4%**	**5%**	**4%**	→	→
13=	From a wine club or membership organization	**3%**	**5%**	**4%**	→	→

32% are online wine buyers vs **33%** in 2021

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Wine-buying retailer usage

Rewe and Edeka remain the top retailers for wine purchases among regular wine drinkers in Germany. These retailers have successfully expanded their market share over the past few years

Wine-buying retailer usage: Tracking, Top 15

% who mainly use the following retailers to buy wine
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1=	Rewe / Rewe Center	24%	25%	31%	↑	↑
1=	Edeka / Neukauf / Aktiv Markt / E-Center	27%	29%	31%	↑	→
3	Kaufland	19%	23%	24%	↑	→
4	Aldi	19%	18%	18%	→	→
5	Lidl	17%	16%	14%	↓	→
6	Netto	13%	10%	11%	→	→
7	Jacques´ Weindepot	8%	9%	10%	→	→
8	Penny	7%	7%	6%	→	→
9	Globus	4%	5%	5%	→	→
10=	Real	10%	7%	4%	↓	↓
10=	Galeria Kaufhof	1%	3%	4%	↑	→
12=	Hawesko	4%	4%	3%	→	→
12=	Metro	2%	3%	3%	→	→
12=	Norma	2%	3%	3%	→	→
12=	Marktkauf	3%	3%	3%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Consumption frequency

There has been a decrease in the frequency of wine consumption for regular wine drinkers, with significantly fewer of them consuming wine on a daily basis

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All German regular wine drinkers (n≥1,003)

	2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
Most days / every day	**9%**	**9%**	**6%**	↓	↓
2-5 times a week	**27%**	**28%**	**26%**	→	→
About once a week	**34%**	**35%**	**36%**	→	→
1-3 times a month	**30%**	**27%**	**31%**	→	↑

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All German regular wine drinkers (n=1,003)

	All German Regular Wine Drinkers (n=1,003)	18-24 Gen Z (n=70)	25-39 Millennials (n=189)	40-54 Gen X (n=266)	55+ Boomers (n=478)
Most days / every day	**6%**	**6%**	**5%**	**4%**	**8%**
2-5 times a week	**26%**	**16%**	**26%**	**27%**	**27%**
About once a week	**36%**	**34%**	**39%**	**37%**	**36%**
1-3 times a month	**31%**	**44%**	**30%**	**32%**	**29%**

Market context:

Wine consumption in Germany has been steadily declining due to demographic and societal factors. Older wine consumers are drinking less, and younger consumers are entering the category later

Executive Summary Report 2023 Germany

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Off-trade consumption frequency

There has been a short-term decrease in wine consumption at home for both informal meals and more formal dinner parties

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade

	2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
A relaxing drink at the end of the day at home	**6.82**	**6.60**	**6.37**	➡	➡
With an informal meal at home	**3.58**	**3.78**	**3.26**	➡	⬇
With a more formal dinner party at home	**1.15**	**1.56**	**1.29**	➡	⬇
At a party / celebration at home	**1.57**	**1.81**	**1.76**	➡	➡

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

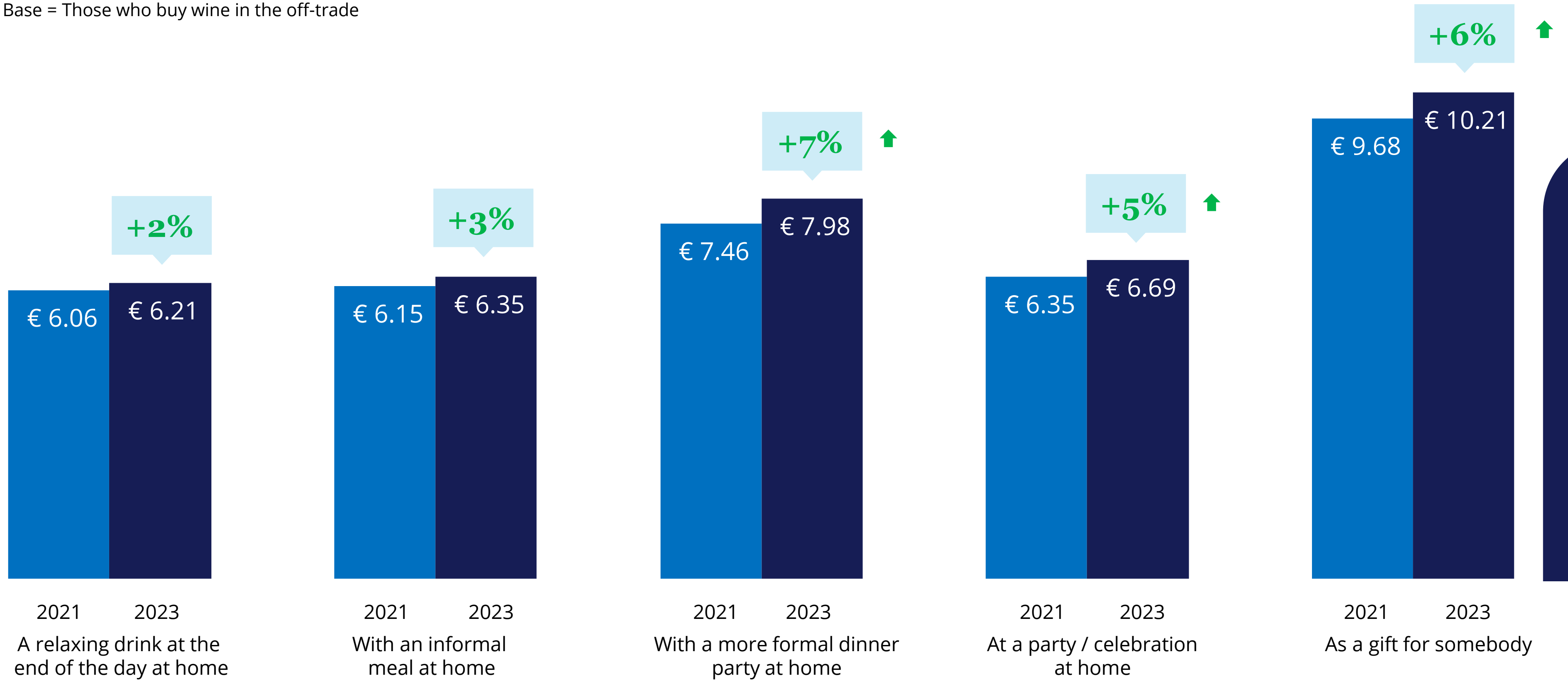
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Average off-trade spend

Spending has increased across all occasions, but especially formal ones, mainly driven by high inflation rates

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the off-trade



Market context:

Germany's economy faced challenges in 2022 due to inflation reaching 7.9%, the highest in 20 years. This led to inflated energy prices, higher raw material costs, and supply chain disruptions in various sectors, including alcoholic beverages

Executive Summary Report 2023 Germany

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Germany, Mar ’21, Jan ’23, (n≥1,003) German regular wine drinkers

On-trade consumption

Post-pandemic, the on-trade sector, especially in restaurants and bars, has witnessed a resurgence in drinking.

This trend is primarily driven by younger generations, specifically Gen Z and Millennials, who are frequenting bars significantly more frequently than Boomers

Wine purchase in on-trade

% who buy wine in a bar, pub or restaurant
Base = All German regular wine drinkers (n≥1,003)

On-trade location		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
Bar or pub	Yes	38%	41%	43%	↑	→
	No	62%	59%	57%	↓	→
Restaurant	Yes	62%	63%	68%	↑	↑
	No	38%	37%	32%	↓	↓
On-trade drinkers	Yes	64%	65%	70%	↑	↑
	No	36%	35%	30%	↓	↓

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All German regular wine drinkers (n=1,003)

On-trade location		All German Regular Wine Drinkers (n=1,003)	18-24 Gen Z (n=70)	25-39 Millennials (n=189)	40-54 Gen X (n=266)	55+ Boomers (n=478)
Bar	Yes	43%	58%	70%	45%	29%
	No	57%	42%	30%	55%	71%
Restaurant	Yes	68%	90%	89%	75%	53%
	No	32%	10%	11%	25%	47%
On-trade drinkers	Yes	70%	92%	92%	77%	55%
	No	30%	8%	8%	23%	45%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

On-trade consumption frequency

The number of regular wine consumers drinking wine as a relaxing drink at the end of the day has decreased compared to last year, with consumption levels returning to those observed in 2021. Higher prices have encouraged the 'at-home-occasion' to replace drinks out of the home

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade

	2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
A relaxing drink out at the end of the day	**3.90**	**4.53**	**3.86**	➡	⬇
With an informal meal in a pub / bar / restaurant	**1.79**	**2.00**	**1.98**	➡	➡
With a more formal dinner in a restaurant	**1.91**	**2.23**	**1.93**	➡	➡
At a party / celebration / big night out	**1.49**	**1.95**	**1.73**	➡	➡

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

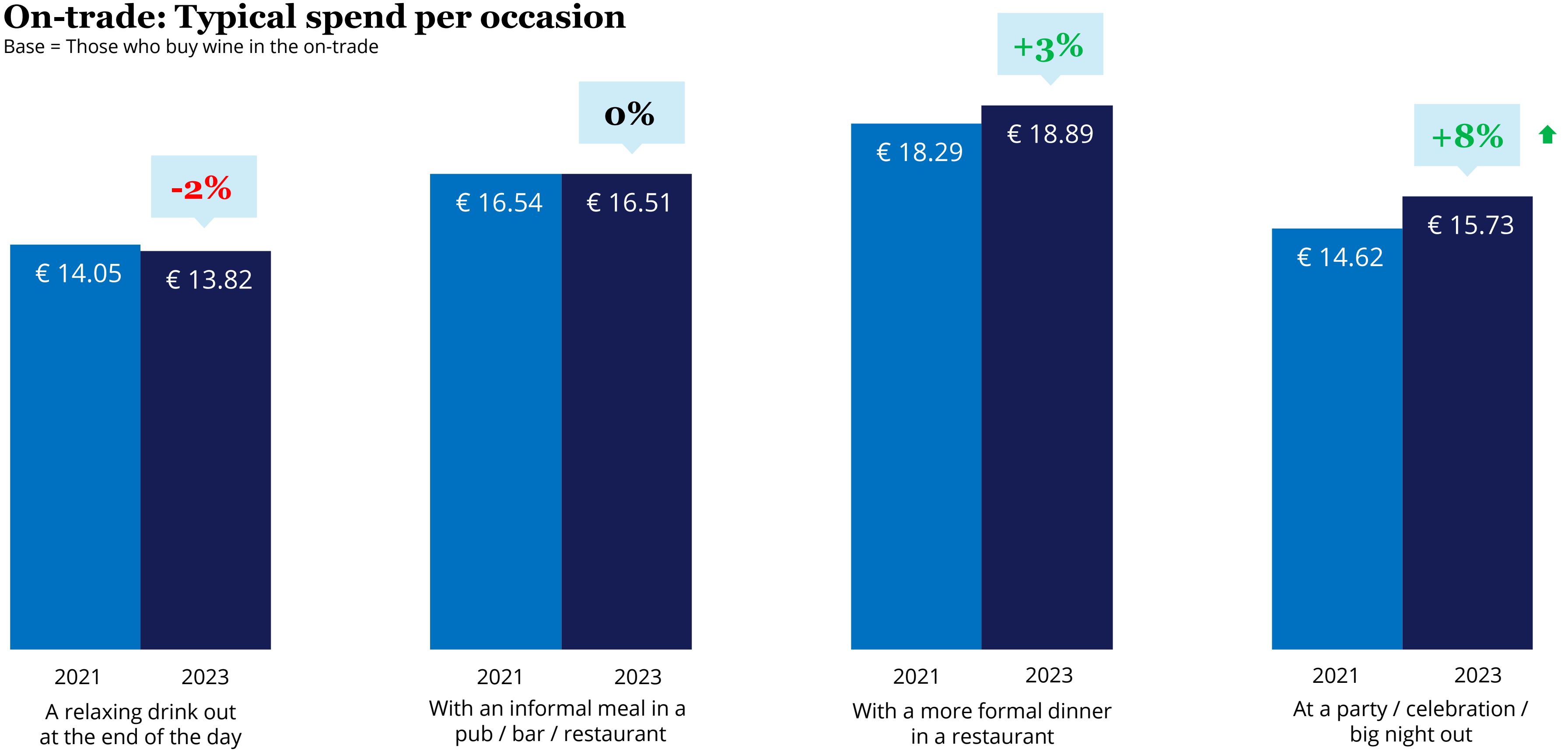
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Typical on-trade spend

Spending has significantly increased for party celebrations and big nights out. Again, this is in line with increasing prices

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Germany, Mar '21, Jan '23, (n≥1,003) German regular wine drinkers

Wine Views and Attitudes

Germany Wine Landscapes

2023

Attitudes towards wine

There has been a notable shift in behaviours, with more regular wine drinkers expressing a willingness to purchase wine based on price rather than specific preferences.

This trend suggests that price has become a more influential factor in purchasing decisions over the long term, possibly caused by inflation

Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All German regular wine drinkers (n=1,003)

	2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
I enjoy trying new and different styles of wine on a regular basis	**45%**	**44%**	**48%**	➡	➡
I don't mind what I buy so long as the price is right	**9%**	**13%**	**13%**	⬆	➡
I know what I like and I tend to stick to what I know	**46%**	**43%**	**39%**	⬇	➡

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All German regular wine drinkers (n=1,003)

	All German Regular Wine Drinkers (n=1,003)	18-24 Gen Z (n=70)	25-39 Millennials (n=189)	40-54 Gen X (n=266)	55+ Boomers (n=478)
I enjoy trying new and different styles of wine on a regular basis	**48%**	**51%**	**63%**	**51%**	**39%**
I don't mind what I buy so long as the price is right	**13%**	**30%**	**17%**	**15%**	**8%**
I know what I like and I tend to stick to what I know	**39%**	**19%**	**20%**	**34%**	**53%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Wine involvement

Wine involvement has remained relatively stable over time and across generations, with approximately one in three German regular wine drinkers demonstrating a high level of involvement in the category

Wine involvement: Tracking

Base = All German regular wine drinkers (n≥1,003)

	2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
High involvement	**32%**	**31%**	**33%**	➡	➡
Medium involvement	**39%**	**42%**	**42%**	➡	➡
Low involvement	**29%**	**28%**	**25%**	➡	➡

Wine involvement by generation

Base = All German regular wine drinkers (n=1,003)

	All German Regular Wine Drinkers (n=1,003)	18-24 Gen Z (n=70)	25-39 Millennials (n=189)	40-54 Gen X (n=266)	55+ Boomers (n=478)
High involvement	**33%**	**34%**	**35%**	**31%**	**32%**
Medium involvement	**42%**	**34%**	**44%**	**42%**	**43%**
Low involvement	**25%**	**32%**	**20%**	**26%**	**25%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Involvement and perceived expertise (1)

There is a positive trend among regular wine drinkers in Germany, as more express a strong interest in wine and consider it important to their lifestyle compared to the previous year

Involvement and perceived expertise in wine: Tracking

% who ‘agree’ or ‘strongly agree’ with the following statements
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Drinking wine gives me pleasure	85%	84%	87%	→	→
2	Generally speaking, wine is reasonably priced	64%	62%	63%	→	→
3	I like to take my time when I purchase a bottle of wine	58%	58%	60%	→	→
4	Deciding which wine to buy is an important decision	57%	57%	57%	→	→
5	I have a strong interest in wine	45%	45%	50%	→	↑
6	I always look for the best quality wines I can get for my budget	45%	45%	47%	→	→
7	Wine is important to me in my lifestyle	40%	36%	40%	→	↑
8	I feel competent about my knowledge of wine	34%	32%	36%	→	→
9	Generally speaking, wine is an expensive drink	27%	33%	31%	→	→
10	Compared to others, I know less about the subject of wine	33%	39%	30%	→	↓
11	I don’t understand much about wine	25%	33%	25%	→	↓

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar’21, Apr’22, Jan’23 (n≥1,003) German regular wine drinkers

Involvement and perceived expertise (2)

Over 90% of Boomers state that drinking wine brings them pleasure – more than other generations. Millennials are more likely to consider wine important to their lifestyle, but also see it as being expensive

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All German regular wine drinkers (n=1,003)

Ranking '23		All German Regular Wine Drinkers (n=1,003)	18-24 Gen Z (n=70)	25-39 Millennials (n=189)	40-54 Gen X (n=266)	55+ Boomers (n=478)
1	Drinking wine gives me pleasure	87%	64%	81%	90%	91%
2	Generally speaking, wine is reasonably priced	63%	64%	64%	64%	63%
3	I like to take my time when I purchase a bottle of wine	60%	59%	62%	62%	57%
4	Deciding which wine to buy is an important decision	57%	48%	55%	55%	59%
5	I have a strong interest in wine	50%	60%	50%	48%	49%
6	I always look for the best quality wines I can get for my budget	47%	53%	55%	46%	44%
7	Wine is important to me in my lifestyle	40%	48%	52%	36%	36%
8	I feel competent about my knowledge of wine	36%	44%	43%	38%	31%
9	Generally speaking, wine is an expensive drink	31%	35%	43%	34%	24%
10	Compared to others, I know less about the subject of wine	30%	34%	34%	33%	25%
11	I don't understand much about wine	25%	29%	29%	23%	23%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Apr '23, (n=1,003) German regular wine drinkers

Wine knowledge and confidence

While knowledge levels about wine remain stable among regular wine drinkers in Germany, there has been a significant increase in confidence levels compared to last year

Wine knowledge index: Tracking

Base = All German regular wine drinkers (n≥1,003)

	2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
Knowledge Index	**34.2**	**33.4**	**33.3**	➡	➡

-0.9 Index change

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

Wine confidence index: Tracking

Base = All German regular wine drinkers (n≥1,003)

	2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
Confidence Index	**51.8**	**48.9**	**53.2**	➡	⬆

+1.4 Index change

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar '21, Apr'22, Jan '23, (n≥1,003) German regular wine drinkers

Wine-drinking motivations

There has been an increase in the number of regular wine drinkers in Germany who are drinking wine because they love the taste and find it relaxing

Wine-drinking motivations: Tracking

% who selected the following as reasons why they drink wine
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '22
1	I really love the taste of wine	52%	57%	↑
2	Wine enhances food and meals	52%	56%	→
3=	Drinking wine makes me feel relaxed	41%	50%	↑
3=	To celebrate special occasions	48%	50%	→
5	Wine helps create a warm / friendly atmosphere	41%	45%	→
6	I treat myself with wine at the end of the day	39%	40%	→
7	Wine is about sharing with a partner / close friend or family member	31%	31%	→
8	I like learning about new wines	31%	27%	→
9	I like shopping / choosing wines to drink	24%	25%	→
10	Drinking wine can be good for my health	23%	23%	→
11	Wine is about sharing something with others	21%	21%	→
12	Most of my friends drink wine	19%	17%	→
13	Wine is a refreshing drink	15%	14%	→
14	It makes people sophisticated	9%	12%	↑
15	It makes me feel individual and unique	7%	8%	→
16	Wine is a fashionable drink	8%	6%	↓

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Wine-drinking motivations

Younger generations are more likely to perceive wine as a way of enhancing their sophistication, while Boomers are primarily motivated by their love for the taste of wine and its ability to enhance food and meals

Wine-drinking motivations

% who selected the following as reasons why they drink wine
Base = All German regular wine drinkers (n=1,003)

Ranking '23		All German Regular Wine Drinkers (n=1,003)	18-24 Gen Z (n=70)	25-39 Millennials (n=189)	40-54 Gen X (n=266)	55+ Boomers (n=478)
1	I really love the taste of wine	57%	38%	48%	57%	63%
2	Wine enhances food and meals	56%	51%	40%	55%	63%
3=	Drinking wine makes me feel relaxed	50%	37%	48%	52%	52%
3=	To celebrate special occasions	50%	47%	50%	47%	52%
5	Wine helps create a warm / friendly atmosphere	45%	39%	45%	41%	48%
6	I treat myself with wine at the end of the day	40%	27%	31%	43%	44%
7	Wine is about sharing with a partner / close friend or family member	31%	35%	31%	27%	33%
8	I like learning about new wines	27%	28%	34%	27%	25%
9	I like shopping / choosing wines to drink	25%	21%	24%	24%	27%
10	Drinking wine can be good for my health	23%	22%	19%	21%	26%
11	Wine is about sharing something with others	21%	29%	20%	20%	20%
12	Most of my friends drink wine	17%	18%	19%	16%	16%
13	Wine is a refreshing drink	14%	13%	18%	10%	14%
14	It makes people sophisticated	12%	31%	18%	12%	6%
15	It makes me feel individual and unique	8%	11%	14%	8%	6%
16	Wine is a fashionable drink	6%	5%	8%	6%	4%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Apr '23, (n=1,003) German regular wine drinkers

Wine-buying choice cues

In the long term, recommendations by friends and family have grown in importance as a choice cue for wine consumers. Other choice cues have remained stable over time

Wine choice cues: Tracking

% who indicate each of the following factors is ‘important’ or ‘very important’ when buying wine
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Wine that matches or complements food	76%	73%	75%	→	→
2	Grape variety	71%	71%	71%	→	→
3	The region of origin	73%	69%	70%	→	→
4	The country of origin	68%	66%	68%	→	→
5	A brand I am aware of	67%	70%	67%	→	→
6	Taste or wine style descriptions displayed on the shelves or on wine labels	63%	64%	65%	→	→
7	Recommendation by friend or family	52%	57%	57%	⬆	→
8	Promotional offer	44%	46%	46%	→	→
9=	Appeal of the bottle and / or label design	33%	40%	37%	→	→
9=	Recommendations from shop staff or shop leaflets	33%	37%	37%	→	→
11	Alcohol content	37%	37%	36%	→	→
12	Recommendation by wine guide books	32%	34%	33%	→	→
13=	Whether or not the wine has won a medal or award	29%	31%	29%	→	→
13=	Recommendation by wine critic or writer	30%	31%	29%	→	→

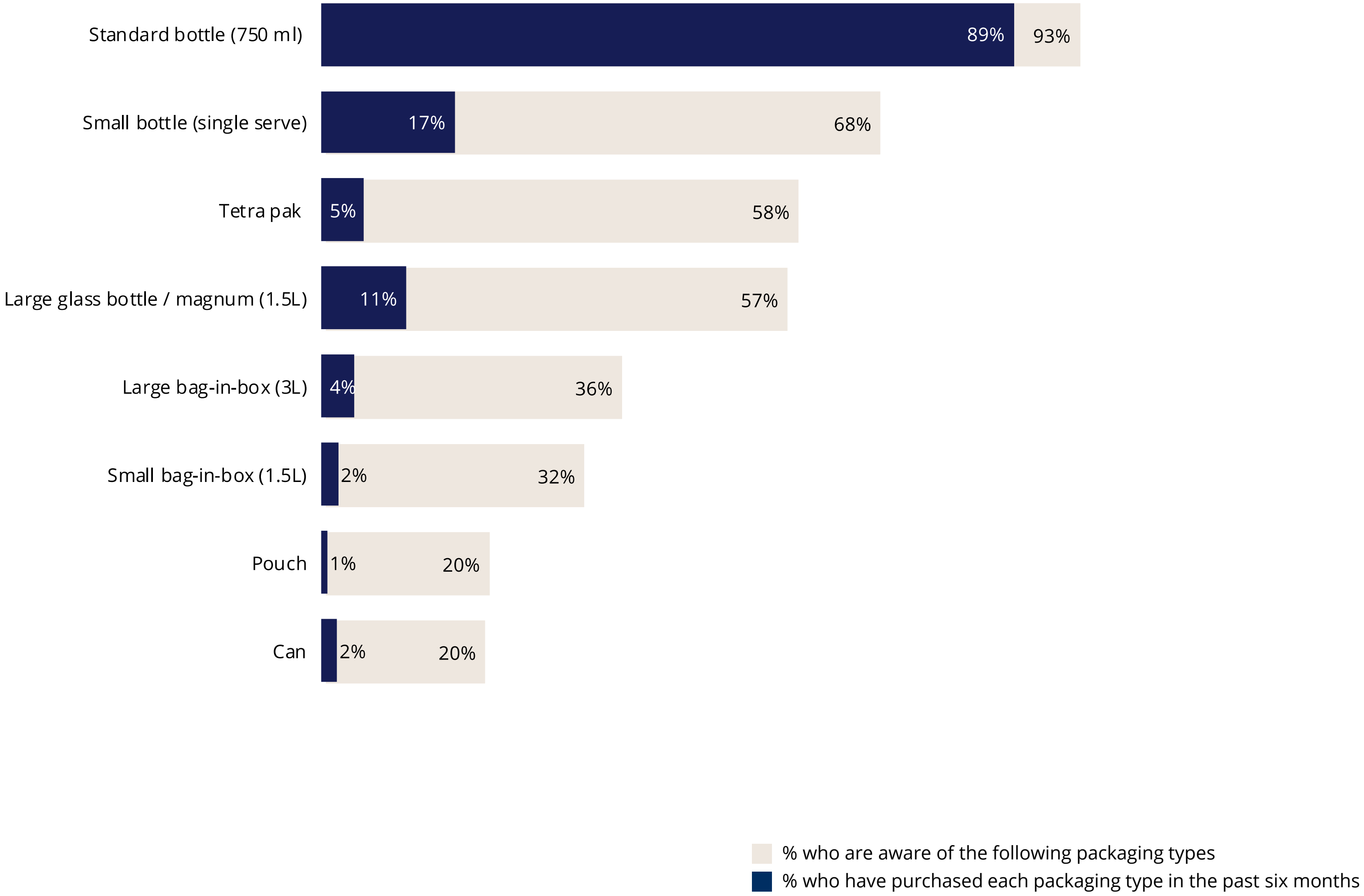
= Represents equal ranking
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar’21, Apr’22, Jan’23 (n≥1,003) German regular wine drinkers

Packaging type consumption and awareness

The most well-known and commonly-purchased packaging type for wine is standard bottles, followed by single-serve bottles. These traditional packaging formats continue to dominate consumer awareness and purchasing preferences in the German wine market

Packaging types: Awareness and consumption levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All German regular wine drinkers (n=1,003)



Source: Wine Intelligence, Vinitrac®, Germany, Apr '23, (n=1,003) German regular wine drinkers

Packaging purchase

Younger generations exhibit a greater openness towards alternative wine packaging formats, such as smaller formats (single serve bottles and cans) and larger formats (magnums and small bag-in-box).

In contrast, Boomers tend to maintain their preference for the traditional standard bottle

Packaging purchase: Tracking

% who have purchased wine in the following packaging types
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '22
1	Standard bottle (750 ml)	87%	89%	➡
2	Small bottle (single serve)	18%	17%	➡
3	Large glass bottle / magnum (1.5L)	13%	11%	➡
4	Tetra pak	4%	5%	➡
5	Large bag-in-box (3L)	4%	4%	➡
6=	Small bag-in-box (1.5L)	1%	2%	➡
6=	Can	2%	2%	➡
8	Pouch	1%	1%	➡

Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All German regular wine drinkers (n=1,003)

Ranking '23		All German Regular Wine Drinkers (n=1,003)	18-24 Gen Z (n=70)	25-39 Millennials (n=189)	40-54 Gen X (n=266)	55+ Boomers (n=478)
1	Standard bottle (750 ml)	89%	75%	81%	90%	93%
2	Small bottle (single serve)	17%	23%	24%	16%	14%
3	Large glass bottle / magnum (1.5L)	11%	34%	17%	10%	6%
4	Tetra pak	5%	7%	6%	5%	5%
5	Large bag-in-box (3L)	4%	5%	6%	3%	4%
6=	Small bag-in-box (1.5L)	2%	9%	6%	1%	0%
6=	Can	2%	3%	6%	2%	0%
8	Pouch	1%	0%	2%	1%	0%

= Represents equal ranking

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Germany, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Brand Health

Germany Wine Landscapes

2023

Global Wine Brand Power Index

Brand health measures included in the index

Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	**Brand awareness index**
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	**Brand purchase index**
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand	
Consideration	% who would consider buying each brand Base = Those who have heard of each brand	
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand	

Wine Brand Power Index

Germany Brand Power

Rotkäppchen holds on to its top spot in the 2023 Germany Brand Power Index

1st

2nd

3rd

German Brand Power Index 2023

Domestic brand Rotkäppchen is maintaining a significant lead in the market. Most brands in the top 30 have experienced an increase in their index scores over the past year

German Brand Power Index

The top 30 most powerful wine brands in the German market based on consumer feedback from six key brand health measures
Base = All German regular wine drinkers (n=1,003)

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Rotkäppchen	90.8	=	-2.4
2	Blanchet	76.1	=	2.4
3	Freixenet Mia	71.6	=	4.4
4	Die Jungen Frank'n	63.0	=	-0.3
5	Badischer Winzerkeller	62.4	↑+1	0.8
6	Erben	59.7	↑+1	-0.1
7	Gallo Family Vineyards	58.7	↑+5	4.3
8	Yellow Tail	56.9	n/a	n/a
9	Golden Kaan	56.8	↑+2	2.5
10	Moselland	56.7	↓-2	-1.7
11	Deutsches Weintor	55.2	↓-6	-7.3
12	Doppio Passo	55.0	↓-2	0.2
13	Lauffener	54.9	↓-4	-1.4
14	Le Sweet Filou	51.9	↑+5	3.7
15	Mederaño	50.9	↓-1	-1.3

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16	Suss & Fruchtig	50.4	↓-3	-3.8
17	Osborne	49.7	↓-2	-1.6
18	Casillero del Diablo	49.6	↑+8	5.2
19	Antinori	47.4	↓-2	-1.4
20	J.P. Chenet	47.3	↓-4	-2.0
21	Amselkeller	47.1	↓-3	-1.4
22	Apothic	46.3	↑+15	8.1
23	Nederburg	46.3	↑+6	2.3
24	Torres	45.3	↓-4	-1.2
25	Dark Horse	43.3	↑+17	6.7
26	Grand Sud	43.3	↓-2	-2.2
27	Michel Schneider	43.0	↓-6	-3.5
28	Campo Viejo	41.9	=	-2.1
29	Marqués de Cáceres	41.4	↓-6	-4.3
30	Zonin	41.4	n/a	n/a

Source: Wine Intelligence, Vinitrac®, Germany, Apr '23, (n=1,003) German regular wine drinkers

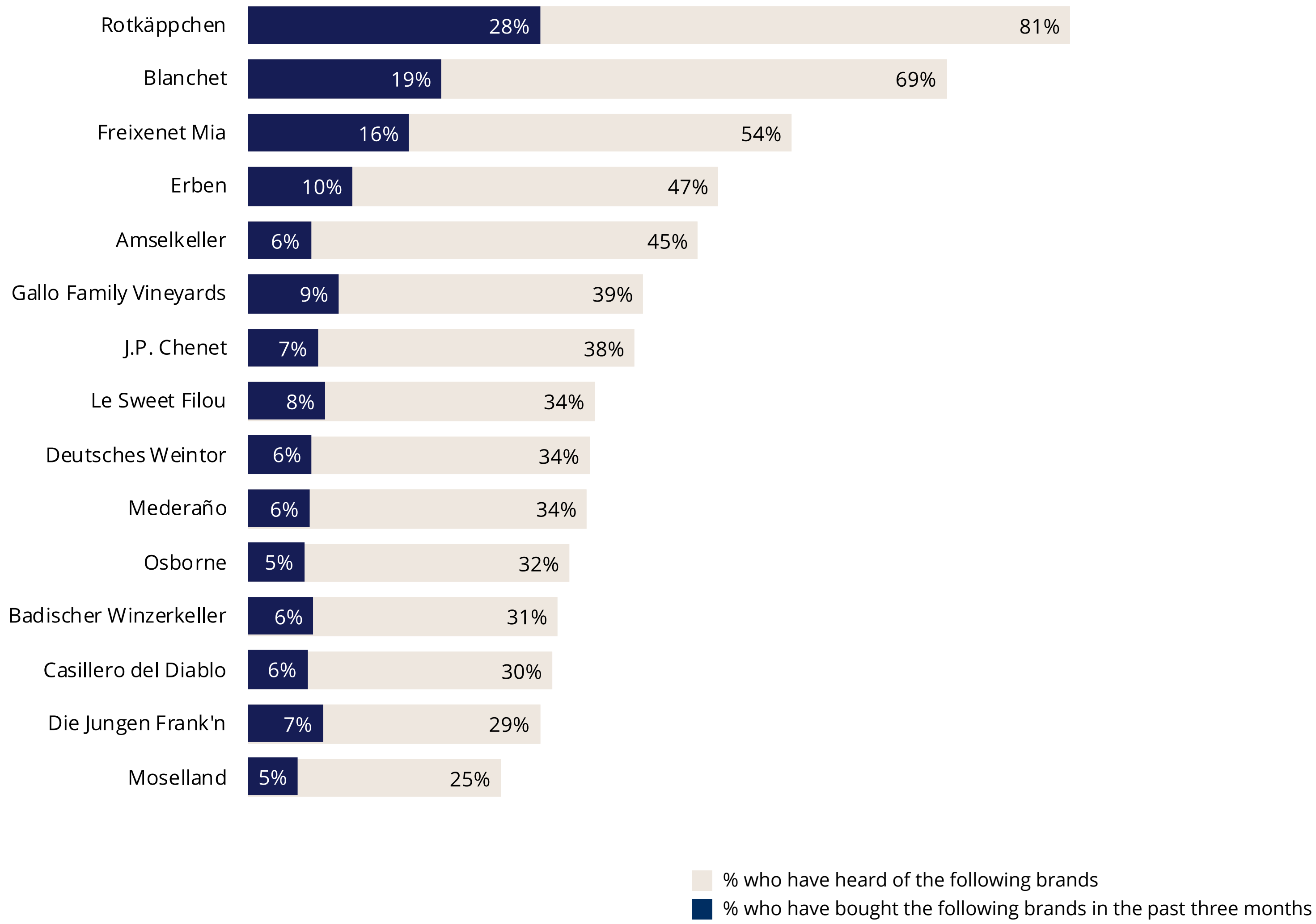
Brand health: Consumption / awareness

Domestic brand Rotkäppchen remains the strong leader in terms of awareness and purchase ratio.

More than a quarter of German regular wine drinkers have purchased Rotkäppchen in the past three months, indicating its strong market presence and popularity among consumers

Brand health: Top 15 awareness and consumption levels

Base = All German regular wine drinkers (n=1,003)



Source: Wine Intelligence, Vinitrac®, Germany, Apr ‘23, (n=1,003) German regular wine drinkers

Brand awareness: Tracking

Overall, awareness levels for wine brands have remained relatively stable. A small number of brands, including top three Rotkäppchen, Blanchet, and Freixenet Mia, have seen a short-term increase in awareness

Awareness: Tracking

% who have heard of the following brands
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Rotkäppchen	81%	76%	81%	→	↑
2	Blanchet	64%	65%	69%	↑	↑
3	Freixenet Mia	50%	44%	54%	→	↑
4	Erben	44%	48%	47%	→	→
5	Amselkeller	43%	51%	45%	→	↓
6	Gallo Family Vineyards	36%	34%	39%	→	↑
7	J.P. Chenet	35%	36%	38%	→	→
8=	Le Sweet Filou	29%	32%	34%	↑	→
8=	Deutsches Weintor	36%	40%	34%	→	↓
8=	Mederaño	32%	31%	34%	→	→
11	Osborne	29%	30%	32%	→	→
12	Badischer Winzerkeller	30%	33%	31%	→	→
13	Casillero del Diablo	25%	26%	30%	↑	→
14	Die Jungen Frank'n	29%	31%	29%	→	→
15=	Moselland	25%	28%	25%	→	→

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
15=	Torres	26%	25%	25%	→	→
17	Medinet	21%	23%	23%	→	→
18=	Faustino	23%	24%	22%	→	→
18=	Lauffener	23%	22%	22%	→	→
20=	Golden Kaan	17%	18%	20%	→	→
20=	Nederburg	19%	18%	20%	→	→
22=	Campo Viejo	18%	18%	19%	→	→
22=	Lamberti	15%	18%	19%	↑	→
24=	Lorch	19%	21%	18%	→	→
24=	Yellow Tail	17%	19%	18%	→	→
26	Mateus	16%	16%	17%	→	→
27=	Michel Schneider	13%	14%	14%	→	→
27=	Mouton Cadet	13%	14%	14%	→	→
27=	Markgräfler Winzer eG	12%	14%	14%	→	→
27=	Suss & Fruchtig	9%	12%	14%	↑	→

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Brand purchase: Tracking

While there have been increases in purchase rates for a few wine brands over the past two years, overall brand purchase rates remain relatively low in Germany compared to other markets

Purchase: Tracking

% who have bought the following brands in the past three months
Base = All German regular wine drinkers (n≥1,003)

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
1	Rotkäppchen	**25%**	**25%**	**28%**	→	→
2	Blanchet	**14%**	**16%**	**19%**	↑	→
3	Freixenet Mia	**10%**	**12%**	**16%**	↑	↑
4	Erben	**7%**	**9%**	**10%**	↑	→
5	Gallo Family Vineyards	**6%**	**6%**	**9%**	↑	↑
6	Le Sweet Filou	**5%**	**7%**	**8%**	↑	→
7=	Die Jungen Frank'n	**7%**	**9%**	**7%**	→	→
7=	J.P. Chenet	**5%**	**6%**	**7%**	→	→
9=	Badischer Winzerkeller	**6%**	**6%**	**6%**	→	→
9=	Deutsches Weintor	**6%**	**8%**	**6%**	→	→
9=	Amselkeller	**4%**	**6%**	**6%**	↑	→
9=	Mederaño	**5%**	**5%**	**6%**	→	→
9=	Casillero del Diablo	**2%**	**3%**	**6%**	↑	↑
9=	Lauffener	**6%**	**4%**	**6%**	→	→
15=	Yellow Tail	**4%**	**5%**	**5%**	→	→

Ranking '23		2021 (n=1,005)	2022 (n=1,007)	2023 (n=1,003)	Tracking vs. '21	Tracking vs. '22
15=	Osborne	**4%**	**5%**	**5%**	→	→
15=	Golden Kaan	**4%**	**3%**	**5%**	→	↑
15=	Mosselland	**5%**	**5%**	**5%**	→	→
19=	Doppio Passo	**3%**	**3%**	**4%**	→	→
19=	Suss & Fruchtig	**3%**	**4%**	**4%**	→	→
19=	Nederburg	**3%**	**2%**	**4%**	→	↑
19=	Torres	**3%**	**3%**	**4%**	→	→
23=	Medinet	**2%**	**3%**	**3%**	→	→
23=	Michel Schneider	**3%**	**3%**	**3%**	→	→
23=	Campo Viejo	**2%**	**2%**	**3%**	→	→
23=	Grand Sud	**2%**	**3%**	**3%**	→	→
23=	Faustino	**2%**	**4%**	**3%**	→	→
28=	Zonin	**1%**	**2%**	**2%**	→	→
28=	Marqués de Cáceres	**1%**	**2%**	**2%**	→	→
28=	Lorch	**2%**	**2%**	**2%**	→	→

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Brand conversion: Tracking

Brand conversion has remained stable over the past few years with only a handful of brands experiencing a significant increase

Conversion: Tracking

% who have bought the following brands in the past three months
Base = Those who have heard of each brand

Ranking '23		2021	2022	2023	Tracking vs. '21	Tracking vs. '22
1	Rotkäppchen	30%	32%	35%	→	→
2	Doppio Passo	34%	28%	34%	→	→
3	Suss & Fruchtig	38%	33%	31%	→	→
4	Yellow Tail	22%	25%	30%	→	→
5	Freixenet Mia	19%	28%	29%	↑	→
6=	Blanchet	22%	24%	27%	↑	→
6=	Grand Sud	26%	24%	27%	→	→
8=	Lauffener	25%	18%	25%	→	↑
8=	Golden Kaan	21%	18%	25%	→	→
8=	Die Jungen Frank'n	23%	30%	25%	→	→
8=	Apothic	13%	23%	25%	→	→
12=	Baron de Lestac	21%	25%	23%	→	→
12=	Gallo Family Vineyards	17%	19%	23%	→	→
14=	Le Sweet Filou	17%	21%	22%	→	→
14=	Erben	17%	18%	22%	→	→

Ranking '23		2021	2022	2023	Tracking vs. '21	Tracking vs. '22
14=	Michel Schneider	19%	19%	22%	→	→
17	Badischer Winzerkeller	20%	18%	21%	→	→
18=	Moselland	20%	19%	19%	→	→
18=	Ramón Bilbao	14%	9%	19%	→	→
18=	Zonin	17%	21%	19%	→	→
18=	Casillero del Diablo	10%	12%	19%	↑	↑
18=	Barefoot	9%	17%	19%	→	→
23=	Nederburg	16%	9%	18%	→	↑
23=	Deutsches Weintor	17%	20%	18%	→	→
23=	Marqués de Cáceres	12%	20%	18%	→	→
23=	Mederaño	17%	17%	18%	→	→
23=	J.P. Chenet	16%	16%	18%	→	→
28=	Dark Horse	14%	19%	17%	→	→
28=	Osborne	14%	16%	17%	→	→
30	Winzerkeller Auggener Schäf	19%	16%	16%	→	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Brand consideration: Tracking

Over the past two years, both Yellow Tail and Golden Kaan have experienced significant increases in consideration among consumers

Consideration: Tracking

% who would consider buying the following brands
Base = Those who have heard of each brand

Ranking '23		2021	2022	2023	Tracking vs. '21	Tracking vs. '22
1	Yellow Tail	51%	55%	65%	↑	↑
2	Golden Kaan	53%	49%	63%	↑	↑
3=	Moselland	60%	55%	60%	→	→
3=	Badischer Winzerkeller	61%	55%	60%	→	→
5=	Die Jungen Frank'n	65%	60%	59%	→	→
5=	Doppio Passo	59%	59%	59%	→	→
5=	Suss & Fruchtig	51%	50%	59%	→	→
5=	Antinori	57%	59%	59%	→	→
9	Apothic	48%	44%	58%	→	→
10	Lauffener	56%	53%	57%	→	→
11=	KWV	50%	34%	56%	→	→
11=	Gallo Family Vineyards	49%	44%	56%	→	↑
13=	Dark Horse	48%	34%	55%	→	↑
13=	Barefoot	46%	45%	55%	→	→
15=	Lorch	44%	46%	54%	↑	→

Ranking '23		2021	2022	2023	Tracking vs. '21	Tracking vs. '22
15=	Grand Sud	45%	44%	54%	→	→
17=	Baron de Lestac	37%	39%	53%	→	→
17=	Deutsches Weintor	58%	48%	53%	→	→
17=	Rotkäppchen	51%	48%	53%	→	→
20=	Osborne	51%	42%	52%	→	↑
20=	Marqués de Cáceres	50%	49%	52%	→	→
20=	Freixenet Mia	46%	52%	52%	→	→
20=	Nederburg	46%	44%	52%	→	→
24=	Michel Schneider	51%	43%	51%	→	→
24=	Mateus	29%	38%	51%	↑	↑
24=	Erben	39%	42%	51%	↑	↑
24=	Zonin	42%	40%	51%	→	→
28	Blanchet	42%	42%	50%	↑	↑
29=	Torres	51%	42%	49%	→	→
29=	Le Sweet Filou	40%	42%	49%	↑	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Brand affinity: Tracking

Affinity has remained largely stable over the past few years

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '23		2021	2022	2023	Tracking vs. '21	Tracking vs. '22
1	Die Jungen Frank'n	50%	51%	48%	→	→
2	Badischer Winzerkeller	48%	41%	47%	→	→
3=	Antinori	47%	34%	46%	→	→
3=	Golden Kaan	43%	37%	46%	→	→
5	Doppio Passo	41%	39%	45%	→	→
6	Apothic	33%	35%	44%	→	→
7=	Dark Horse	28%	31%	43%	→	→
7=	Yellow Tail	36%	40%	43%	→	→
9	Moselland	41%	44%	41%	→	→
10	Lauffener	39%	40%	40%	→	→
11	Freixenet Mia	35%	42%	39%	→	→
12=	Suss & Fruchtig	42%	47%	38%	→	→
12=	Grand Sud	37%	25%	38%	→	↑
12=	Rotkäppchen	40%	34%	38%	→	→
15	Deutsches Weintor	39%	36%	35%	→	→

Ranking '23		2021	2022	2023	Tracking vs. '21	Tracking vs. '22
16=	Gallo Family Vineyards	28%	31%	34%	→	→
16=	Nederburg	26%	23%	34%	→	↑
16=	Blanchet	29%	31%	34%	↑	→
16=	Zonin	27%	31%	34%	→	→
16=	Mederaño	29%	29%	34%	→	→
21=	Marqués de Cáceres	33%	41%	33%	→	→
21=	Michel Schneider	42%	37%	33%	→	→
23=	Ruffino	24%	24%	32%	→	→
23=	Mateus	19%	27%	32%	↑	→
23=	Winzerkeller Auggener Schäf	37%	34%	32%	→	→
23=	Casillero del Diablo	26%	24%	32%	→	↑
27=	Mouton Cadet	39%	31%	31%	→	→
27=	Divino	27%	30%	31%	→	→
27=	Campo Viejo	29%	23%	31%	→	→
27=	Markgräfler Winzer eG	32%	34%	31%	→	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Brand recommendation: Tracking

While the recommendation levels for most brands remained relatively stable, there were notable changes for Yellow Tail and Casillero del Diablo, both of which saw an increase over both the long and short term

Recommendation: Tracking

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Ranking '23		2021	2022	2023	Tracking vs. '21	Tracking vs. '22
1	KWV	30%	38%	50%	→	→
2=	Doppio Passo	49%	38%	47%	→	→
2=	Die Jungen Frank'n	44%	49%	47%	→	→
2=	Badischer Winzerkeller	47%	43%	47%	→	→
5	Moselland	41%	40%	46%	→	→
6=	Lauffener	38%	40%	43%	→	→
6=	Yellow Tail	33%	30%	43%	↑	↑
8=	Antinori	42%	44%	42%	→	→
8=	Apothic	31%	33%	42%	→	→
10=	Markgräfler Winzer eG	41%	40%	40%	→	→
10=	Suss & Fruchtig	37%	47%	40%	→	→
10=	Golden Kaan	35%	35%	40%	→	→
13	Rotkäppchen	38%	37%	39%	→	→
14=	Freixenet Mia	31%	37%	38%	↑	→
14=	Deutsches Weintor	40%	34%	38%	→	→

Ranking '23		2021	2022	2023	Tracking vs. '21	Tracking vs. '22
14=	Baron de Lestac	32%	35%	38%	→	→
14=	Roodeberg	38%	16%	38%	→	↑
18	Winzerkeller Auggener Schäf	37%	37%	37%	→	→
19=	Barefoot	33%	30%	35%	→	→
19=	Casillero del Diablo	26%	20%	35%	↑	↑
21=	Dark Horse	34%	29%	34%	→	→
21=	Gallo Family Vineyards	29%	31%	34%	→	→
21=	Blanchet	27%	31%	34%	↑	→
21=	Nederburg	29%	29%	34%	→	→
25=	Marqués de Cáceres	44%	33%	33%	→	→
25=	Erben	28%	26%	33%	→	↑
25=	Torres	32%	27%	33%	→	→
28=	Zonin	29%	26%	32%	→	→
28=	Michel Schneider	36%	34%	32%	→	→
28=	Faustino	28%	27%	32%	→	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003) German regular wine drinkers

Research Methodology

Germany Wine Landscapes

2023

Research methodology

QUANTITATIVE

The data was collected in Germany since March 2016

The following waves March 2021 and April 2022 were tracked against January 2023

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-trade or in the on-trade

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of German regular wine drinkers in terms of gender*, age and region

The distribution of the sample is shown in the table:

		Mar '21	Apr '22	Jan '23
	n=	***1,005***	***1,007***	***1,003***
Gender*	Male	44%	43%	47%
	Female	56%	56%	53%
	Total	***100%***	***100%***	***100%***
Age	18-24	5%	5%	7%
	25-34	9%	9%	12%
	35-44	12%	11%	13%
	45-54	20%	21%	20%
	55-64	17%	17%	17%
	65 and over	37%	36%	31%
	Total	***100%***	***100%***	***100%***
Region	Baden-Württemberg	14%	14%	15%
	Bayern	15%	15%	16%
	Berlin	3%	4%	5%
	Brandenburg + Mecklenburg-Vorpommern	9%	9%	8%
	Bremen + Niedersachsen	5%	5%	6%
	Hamburg + Schleswig-Holstein	10%	10%	9%
	Hessen	22%	20%	18%
	Nordrhein-Westfalen	6%	6%	6%
	Rheinland-Pfalz + Saarland	10%	11%	12%
	Sachsen + Sachsen-Anhalt + Thüringen	5%	5%	6%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac®, Germany, Mar'21, Apr'22, Jan'23 (n≥1,003)
German regular wine drinkers

**Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas*

Copyright
Wine Intelligence 2023

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

A division of the IWSR Group

Wine Intelligence London (Head Office)

Nutmeg House
60 Gainsford Street
London
SE1 2NY

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

Follow us: