WINE INTELLIGENCE

POLAND WINE LANDSCAPES 2021

October 2021

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INTRODUCTION

Until recently, Poland's wine market was a marginal player amid the large consumption markets in Europe. However, this is changing in the 21st Century. Poland ranks as the 5th most attractive wine market in our Global Compass 2020 report, up nine places from 2019 and is also on track to be part of the top 10 again this year. Why? In short, a positive combination of economic growth, increasing interest in wine among younger consumers (many of whom have lived and worked elsewhere in Europe), and improving quality and range of product in distribution channels.

Even with this positive growth story of the past decade, wine consumption remains low by world standards, let alone European ones. Per head consumption of just over 3 litres per annum is similar to Hong Kong and Barbados; Italians, French, Germans, and Swiss drink 10-15 times as much per head.

However, unlike the rest of Europe, overall wine consumption in Poland has been growing consistently, and especially among younger consumers. Only a quarter of Poles drink wine at least once a week, but a disproportionate share of those 7.5 million consumers are Millennials and Gen Z.

Although price remains one of the top three choice cues when buying wine, wine spending has significantly increased and was only mildly affected by the pandemic. If anything, Polish wine drinkers are willing to treat themselves more post-pandemic, buying better quality wine and trying new alcoholic drinks. A premiumisation phenomenon has also been observed for the last couple of years.

Attitude towards the wine category is generally very positive, with drinkers showing more flexibility and exploration, along with an inquisitive eagerness to enhance their category knowledge. Wine involvement indicators are on the rise, with nearly half of wine drinkers now saying wine is 'important to their lifestyle', up from a third in 2015.

Poland is one of the fastest growing economies in Europe and one that is becoming increasingly influential in a European Union context. Disposable incomes have increased the past few years, providing a stronger purchasing power for wine. Although economic growth has been affected by the Covid crisis, the impact was relatively insignificant compared to other surrounding countries. Poland's Gross Domestic Product (GDP) is expected to bounce back to 3.7% this year and grow to 4.7% in 2022.

Poland heavily relies on imports, but it is one of the few markets in Europe where typical Old World markets do not dominate overall. Eastern European wines are very popular (Bulgaria, Moldova, Hungary, Georgia) but also US and Chile are increasingly well-known and appreciated. Poland is therefore especially interesting for global brands, with opportunity increasing as it continues to develop with consumers increasingly looking to core and recognisable brands and the economy bouncing back post-pandemic.

MANAGEMENT SUMMARY

KEY TAKEAWAYS FROM POLAND WINE LANDSCAPES 2021

- Poland is ranked 5th globally in terms of market attractiveness
- Purchasing power has increased significantly since 2015, resulting in greater spending in the wine category
- Purchase decisions remain mainly driven by price, brand awareness and sweetness levels
- Consumption frequency is low, stemming mostly from at-home occasions
- Best-performing brands offer value for money and rely on strong distribution
- Post-Covid, Polish wine drinkers prioritise discovering new drinks and treating themselves to better-quality wines

MANAGEMENT SUMMARY

STRONG FUNDAMENTALS DRIVING POLAND'S WINE MARKET

Positive prospects for Poland, one of the world's most attractive wine markets

Although relatively low compared to other European markets, consumption frequency has increased with more Polish drinkers consuming wine on a weekly basis; reaching nearly half of the semi-annual wine drinking population and a quarter of all Polish adults.

Wine involvement indicators are also on the rise: nearly half of drinkers have reported wine as an important part of their lifestyle; a significant increase compared with 2015. Consumers have also demonstrated a more adventurous attitude towards the category with a significantly higher proportion of drinkers enjoying trying new and different styles of wine in 2021 compared with 2015.

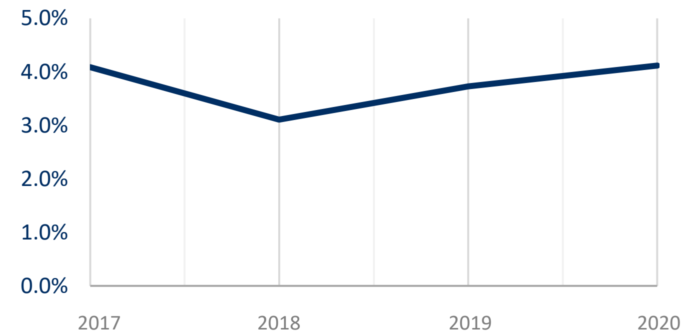
In broader terms, Poland's economy has recently been one of the fastest growing in Europe. Whilst the country has been impacted by the pandemic, the economic damage has been relatively limited. Poland GDP is projected to recover by 3.7% this year and to grow by 4.7% in 2022[(2)]. Despite the crisis, personal budgets for wine consumption have continued to grow and the pandemic appears to have prompted a trading up trend for at-home consumption.

Involvement and perceived expertise in wine: Tracking

Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021	n=	2015 *1,008*	2018 *2,000*	2021 *1,001*	Tracking vs. '15	Tracking vs. '18
1	Drinking wine gives me pleasure	82%	78%	83%	→	↑
2	I always look for the best quality wines I can get for my budget	74%	75%	76%	→	→
3	Deciding which wine to buy is an important decision	58%	63%	68%	↑	↑
4	I like to take my time when I purchase a bottle of wine	63%	63%	67%	↑	↑
5	Generally speaking, wine is reasonably priced	53%	58%	58%	↑	→
6	Wine is important to me in my lifestyle	34%	35%	46%	↑	↑
7	I have a strong interest in wine	34%	39%	45%	↑	↑
8	Compared to others, I know less about the subject of wine	36%	38%	35%	→	→
9	Generally speaking, wine is an expensive drink	29%	29%	34%	↑	↑
10	I don't understand much about wine	38%	35%	30%	↓	↓
11	I feel competent about my knowledge of wine	18%	24%	29%	↑	↑

Wine volume growth rate[(3)]



(3) IWSR 2020 ©Copyright 2021 – The IWSR
(2) https://www.oecd.org/economy/poland-economic-snapshot/
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001), 2018 (n=2,000) and 2015 (n = 1,008) Polish semi-annual wine drinkers

MANAGEMENT SUMMARY

OFF-TRADE REMAINS DOMINANT CHANNEL

Polish wine market mainly relies on off-trade consumption occasions

Overall per capita wine consumption is low in the Polish market as wine drinking primarily occurs within the home.

The vast majority (84%) of Polish semi-annual wine drinkers do not drink wine in bars; this statistic also represented most consumers pre-pandemic. Off-trade dependence continues as fewer consumers report not drinking at all for various off-trade occasions compared with 2015, and average consumption frequency rising overall since 2018.

A lower proportion of Boomers (+55 years-old) drink wine in the on-trade whilst Millennials (25-39 years-old) are the most inclined to consume in the on-trade; about three quarters of them buy wine in a bar, pub or restaurant compared to 41% of Boomers.

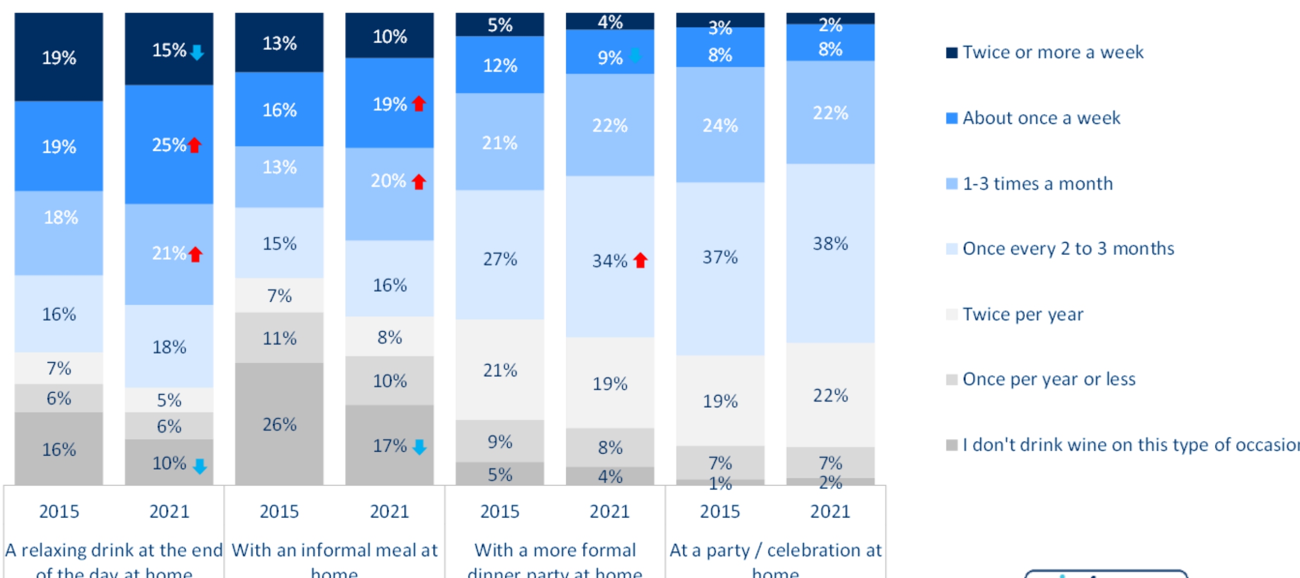
WHAT DO MARKET EXPERTS SAY?

"We are an off-trade country. In the on-trade in general and as a comparison, beer consumption represents about 15% while it is 2% for wine. We mainly buy to consume at home"

Wine Market Researcher, Poland

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade



Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

MANAGEMENT SUMMARY

POLISH DRINKERS LOOKING TO TREAT THEMSELVES POST-COVID

Positive outlook for the wine category post-pandemic

Compared to their pre-pandemic behaviour, Polish wine drinkers are giving higher priority to treating themselves. Their primary ways of doing so include trying new styles of food and drinks and buying better-quality wines.

The younger generations are in particular placing greater priority on trying new foods and alcoholic drinks, but fewer Gen Z consumers are prioritising premiumisation compared with other age groups.

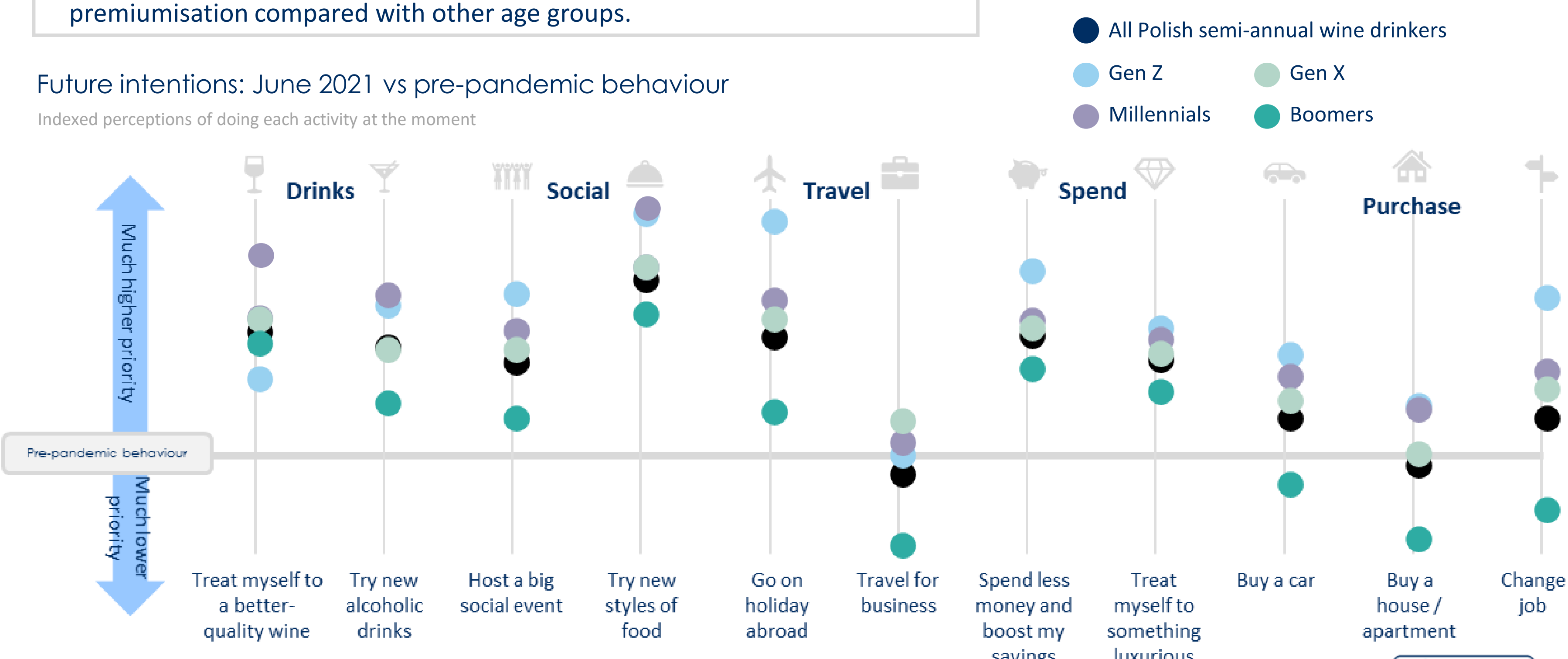
WHAT DO MARKET EXPERTS SAY?

"COVID has certainly helped a sense of premiumisation between consumers, people have been careful to drink better on the whole"

Wine Writer, Poland

Future intentions: June 2021 vs pre-pandemic behaviour

Indexed perceptions of doing each activity at the moment



Gen Z: 19-24 / Millennials: 25-39 / Gen X: 40-54 / Boomers: 55-64

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

MANAGEMENT SUMMARY

Consumption trends in the Polish wine market

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Top alcoholic beverages

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

	2015	2021
Red wine	88%	90%
Beer	79%	86% ↑
Vodka	n/a	70%
White wine	71%	65% ↓
Whisky / Whiskey	n/a	60%

Top countries of origin

% who have drunk wine from the following places in the past 6 months

	2015	2021
France	34%	38%
Italy	27%	37% ↑
Spain	33%	35%
Portugal	23%	27% ↑
Moldova	17%	22% ↑

Top red varietals

% who have drunk the following varietals or wine types in the past 6 months

	2015	2021
Merlot	35%	39% ↑
Cabernet Sauvignon	35%	35%
Red blend	n/a	25%
Pinot Noir	19%	21%
Sangiovese	9%	14% ↑

Top white varietals

% who have drunk the following varietals or wine types in the past 6 months

	2015	2021
Moscato	28%	39% ↑
Riesling	24%	31% ↑
Chardonnay	28%	29%
Sauvignon Blanc	21%	24%
White blend	n/a	19%

↑ / ↓ : Statistically significantly higher / lower than the 2015 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

vinitrac

MANAGEMENT SUMMARY

Purchase trends in the Polish wine market

Top wine-buying channels

% who have bought wine from the following channels in the past 6 months

	2015	2021	
Supermarkets	61%	61%	
Hypermarkets	50%	48%	
Discount supermarkets	39%	48%	↑
Delicatessen	n/a	34%	
Ordinary grocery shop	32%	32%	
Shopping malls	33%	32%	

Top wine-buying retailers

% who mainly use the following retailers to buy wine

	2015	2021	
Biedronka	46%	52%	↑
Lidl	32%	39%	↑
Kaufland	16%	26%	↑
Auchan	16%	18%	
Carrefour	16%	15%	

Top brands

% who have bought the following brands in the past 3 months

	2015	2021	
Carlo Rossi	47%	47%	
Kadarka	36%	31%	↓
Kadarka (Old)	n/a	24%	
Fresco	19%	21%	
El Sol	27%	21%	↓

Top wine-buying choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine

	2015	2021	
Signs about how sweet the wine is	84%	88%	↑
A brand I am aware of	78%	79%	
Price	82%	78%	
Taste or wine style descriptions	n/a	78%	
The country of origin	62%	70%	↑

↑ / ↓ : Statistically significantly higher / lower than the 2015 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

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Wine Intelligence Compass 2021 Report

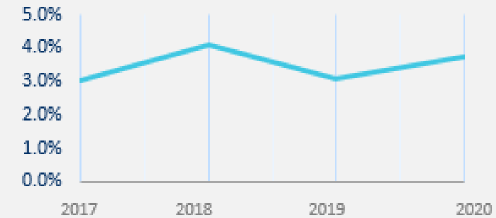
Overview of the Polish wine market

WINE MARKET SUMMARY:

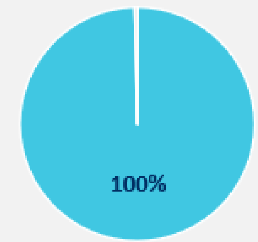
24th largest wine market

Total wine consumption:	13,614	'000 9l cases of still light wine
Long-term trend 2016-20:	4%	CAGR 2016-20
Per capita consumption:	3.2	litres per year (all wine)
Imported wine consumption:	13,557	'000 9l cases of still light wine
Share of imported wine:	100%	

Wine volume growth rates:



Share of imported wine:

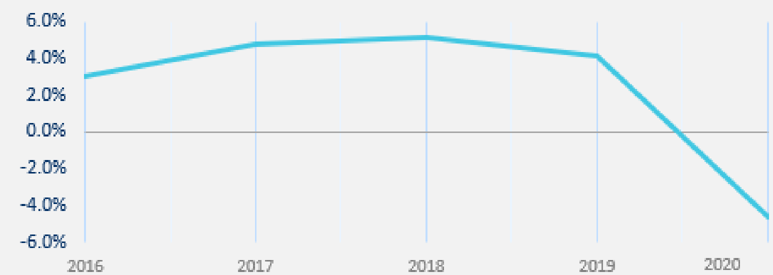


Sources: IWSR, Wine Intelligence Calibration studies, Wine Intelligence Vinitrac®, Wine Intelligence market experience

ECONOMIC SUMMARY:

Adult population:	31.5	Million
GDP/capita:	$ 16,945	Dollars
GDP long-term trend:	3.03%	Average growth 2016-20
GNI/capita:	$ 15,270	Dollars
Unemployment rate:	3.2%	
Corruption index:	56	0 to 100 (100 = no corruption)
Comparative globalisation index:	80	1 to 100 (100 = very globalised)
Predicted 2021 GDP:	3.47%	

GDP growth rates:



Sources: The IWSR, World Bank, IMF, United Nations, International Monetary Fund, Transparency International, KOF Globalisation Index

Interested in the Wine Intelligence **Global Compass 2020** report? Click here for more information
The 2021 version of the report will be available in late August 2021

Source: Wine Intelligence Global Compass report 2021

MARKET CLASSIFICATION

Poland is considered a growing wine market and the 5th most attractive wine market in the world

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
Germany (3)	United States (1)	South Korea (2)	China (4)	Indonesia (27)
Denmark (6)	Canada (10)	Poland (5)	Taiwan (36)	Philippines (29)
Switzerland (6)	Ireland (15)	Russia (10)	Turkey (38)	Thailand (34)
United Kingdom (8)	Japan (18)	Singapore (12)	Colombia (39)	Malaysia (40)
France (9)	Hungary (21)	Romania (16)	United Arab Emirates (45)	India (41)
Netherlands (13)	Czech Republic (22)	Brazil (26)	Peru (46)	Vietnam (43)
Spain (14)	Italy (24)	Mexico (28)	Angola (50)	Nigeria (48)
Belgium & Luxembourg (17)	Portugal (25)			
Sweden (19)	New Zealand (30)			
Australia (20)	Finland (32)			
Austria (23)	Hong Kong (33)			
Norway (31)	Greece (37)			
Slovakia (35)	Slovenia (44)			
Chile (42)	South Africa (49)			
Argentina (47)				

() Rank by attractiveness
() Top 10 most attractive wine markets in the world
Wine Intelligence global wine market attractiveness model

IMPORTED VS. DOMESTIC STILL WINE MARKET

Still wine volumes have increased steadily over the past few years from most origins though overall value has grown at a more modest pace

wine intelligence

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

Thousands of 9 litre cases	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20	Market share	Retail price per 0.75L 2020 (US$)	Retail price CAGR 16-20	Retail price CAGR 19-20
Total	11,825	12,256	12,734	13,075	13,614	4%	4%	100%	5.59	2%	0%
Domestic	17	25	35	48	57	35%	19%	0%	6.68	-1%	-6%
Imported	11,808	12,231	12,699	13,027	13,557	4%	4%	100%	5.59	2%	0%
International	3,733	3,789	3,541	3,338	3,620	-1%	8%	27%	3.83	1%	0%
US	1,555	1,701	1,905	2,060	2,009	7%	-2%	15%	6.27	7%	-3%
French	785	802	831	907	1,023	7%	13%	8%	7.75	-2%	-2%
Italian	940	948	963	988	1,017	2%	3%	7%	8.16	0%	0%
Chilean	785	868	964	918	951	5%	4%	7%	6.59	1%	5%
Moldovan	650	672	802	870	919	9%	6%	7%	4.71	-2%	0%
Spanish	604	653	745	808	824	8%	2%	6%	6.49	3%	5%
Portuguese	601	613	624	666	691	4%	4%	5%	5.24	3%	2%
Bulgarian	690	714	725	747	681	0%	-9%	5%	3.52	1%	2%
Hungarian	376	400	414	430	443	4%	3%	3%	3.62	0%	1%
Georgian	223	194	294	343	375	14%	9%	3%	7.80	-1%	-4%
Greek	160	169	189	206	215	8%	5%	2%	4.08	5%	25%
Australian	150	166	168	186	194	7%	5%	1%	7.07	1%	10%
South African	138	121	118	127	126	-2%	-1%	1%	5.51	-2%	-5%
German	135	130	126	124	122	-2%	-1%	1%	6.73	0%	-2%
Argentinian	98	101	98	107	112	4%	5%	1%	9.52	-1%	-1%
Austrian	49	49	49	49	49	0%	0%	0%	8.42	0%	0%

IWSR 2020

IMPORTED VS. DOMESTIC SPARKLING AND FORTIFIED WINE MARKET SHARE

Like still wine, sparkling wine volumes are also increasing year-on-year; however, their retail value is increasing consistently over the past 5 years

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

Thousands of 9 litre cases	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20	Market share	Retail price per 0.75L 2020 (US$)	CAGR 16-20	CAGR 19-20
Total	3,585	3,580	3,720	4,096	4,177	4%	2%	100%	5.30	8%	1%
Domestic	2,753	2,699	2,607	2,656	2,671	-1%	1%	64%	2.84	4%	1%
Imported	833	881	1,113	1,441	1,506	16%	5%	36%	9.68	2%	0%
Italian	588	630	854	1,155	1,213	20%	5%	29%	8.58	4%	2%
Spanish	90	96	106	117	127	9%	9%	3%	9.82	7%	7%
French	65	71	74	78	78	5%	0%	2%	31.35	1%	-9%
Latvian	23	25	27	29	30	7%	3%	1%	3.85	0%	0%
German	36	30	27	24	21	-12%	-12%	1%	4.70	-1%	-2%

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

Thousands of 9 litre cases	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20	Market share	Retail price per 0.75L 2020 (US$)	CAGR 16-20	CAGR 19-20
Total	28	34	46	47	41	10%	-14%	100%	9.42	-2%	3%
Domestic	0	0	0	0	0	-	-	0%		-	-
Imported	28	34	46	47	41	10%	-14%	100%	9.42	-2%	3%
Portuguese	16	17	18	19	20	5%	3%	48%	11.75	0%	-5%
Moldovan	4	8	18	19	13	36%	-31%	32%	5.40	-1%	0%
Spanish	4	6	7	6	5	9%	-9%	13%	11.18	3%	0%
Italian	3	3	3	3	2	-8%	-27%	5%	8.98	0%	0%

PER CAPITA CONSUMPTION OF STILL LIGHT WINE

Amid a backdrop of decline elsewhere in Europe, per capita consumption of still light wine is increasing year-on-year in the Polish wine market, from a very low base

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

	Market	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20
1	Italy	37.6	38.5	38.2	37.2	35.8	-1.2%	-3.8%
2	Portugal	39.1	40.6	39.8	39.7	33.2	-4.0%	-16.3%
3	Slovenia	35.6	36.0	36.1	36.4	31.1	-3.3%	-14.6%
4	Switzerland	32.3	31.7	31.2	30.9	30.6	-1.4%	-1.1%
5	Montenegro	34.8	34.7	34.5	34.5	30.2	-3.5%	-12.4%
65	Hong Kong	5.0	5.1	4.8	4.5	4.2	-4.2%	-5.9%
66	Albania	5.0	5.0	5.0	5.2	4.1	-4.8%	-21.3%
67	St. Kitts	3.7	4.0	4.4	4.5	3.5	-1.1%	-21.7%
68	Poland	2.8	2.9	3.0	3.1	3.2	3.8%	4.3%
69	Lithuania	3.9	3.4	3.0	3.0	3.1	-5.9%	0.7%
70	Barbados	3.3	3.4	3.3	3.3	3.0	-2.1%	-9.4%
71	Paraguay	4.0	3.5	3.6	3.5	2.7	-9.2%	-21.1%
72	Puerto Rico	2.5	2.3	2.4	2.4	2.5	0.5%	6.6%

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OVERVIEW OF WINE DRINKERS IN THE POLISH MARKET 2021

A quarter of Poland's adult population drinks wine weekly

Adult population — 31.5 million [1]

58%

Estimated wine drinkers P12M (red, white or rosé wine) — 18.2 million [2]

85%

Semi-annual (i.e. at least twice a year) wine drinkers — 15.4 million [2]

Sample for this report

49%

Weekly wine drinkers — 7.5 million [3]

49%

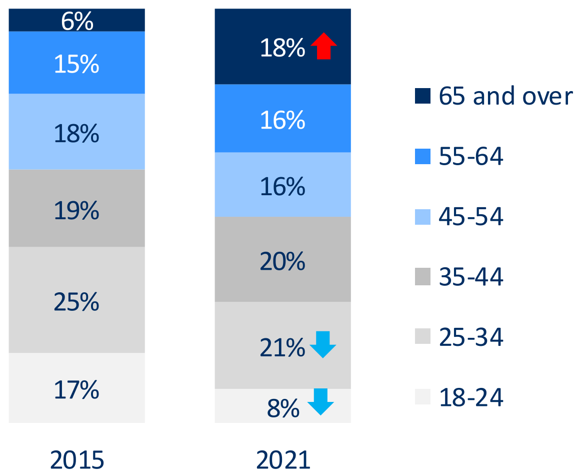
24%

Sources:
1 CIA
2 Wine Intelligence online calibration studies with SSI, July '19, n=1,000 Polish adults,18+. Wine=still light wine (red, white, rosé), recalibrated to Central Statistical Office of Poland population data
3 Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

DEMOGRAPHICS OF POLISH SEMI-ANNUAL WINE DRINKERS

Higher proportions of Polish consumers are aged 65+ and more affluent compared with 2015

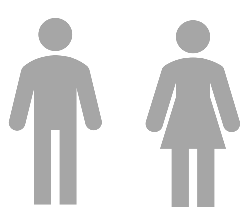
Age



Wine category involvement

	2015	2021
High	39%	35%
Medium	32%	42%
Low	29%	23%

Gender



2021	46%	54%
2015	43%	57%

Total household income (before tax)

	2015	2021
Less than 2,000 PLN	10%	4%
Between 2,000 - 3,999 PLN	26%	17%
Between 4,000 - 5,999 PLN	26%	23%
Between 6,000 - 7,999 PLN	14%	23%
More than 8,000 PLN	9%	28%
No income	1%	0.4%
Prefer not to answer	14%	5%

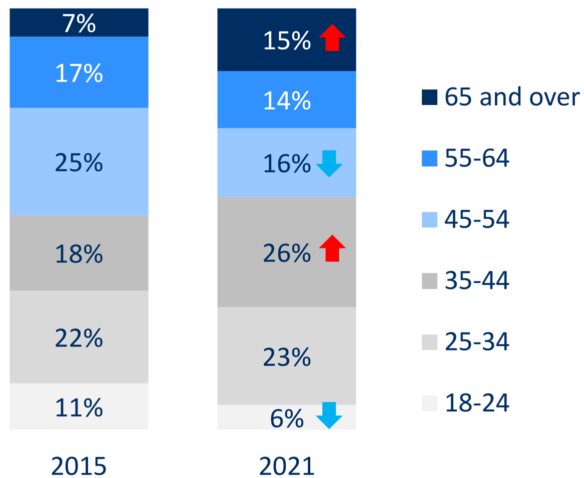
/ : Statistically significantly higher / lower than the 2015 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

DEMOGRAPHICS OF POLISH WEEKLY WINE DRINKERS

Consumers aged 25-44 comprise half of the Polish weekly wine drinking population, a significant increase since 2015

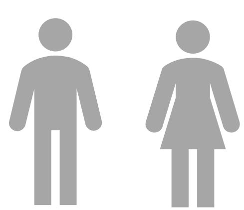
Age



Wine category involvement

	2015	2021
High	56%	53%
Medium	31%	38% ↑
Low	13%	9%

Gender



2021	45%	55%
2015	46%	54%

Total household income (before tax)

	2015	2021
Less than 2,000 PLN	5%	2% ↓
Between 2,000 - 3,999 PLN	24%	14% ↓
Between 4,000 - 5,999 PLN	29%	24%
Between 6,000 - 7,999 PLN	18%	23% ↑
More than 8,000 PLN	13%	33% ↑
No income	1%	0%
Prefer not to answer	10%	3% ↓

↑ / ↓ : Statistically significantly higher / lower than the 2015 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

WINE CONSUMPTION FREQUENCY

Although still relatively low compared with other European markets, consumption frequency has increased in the Polish market compared with 2015, led by Millennials

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Polish semi-annual wine drinkers (n≥1,001)

	2015	2018	2021	Tracking	
n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
Most days / every day	3%	2%	3%	→	→
2-5 times a week	18%	15%	15%	→	→
About once a week	25%	28%	31%	↑	→
1-3 times a month	16%	28%	27%	↑	→
Once every 2 to 3 months	32%	21%	19%	↓	→
Twice per year	7%	5%	5%	→	→

Wine consumption frequency by age

% who usually drink wine at the following frequency
Base = All Polish semi-annual wine drinkers (n=1,001)

	All Polish semi-annual wine drinkers	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
n=	*1,001*	*82*	*326*	*245*	*348*
Most days / every day	3%	1%	3%	5%	2%
2-5 times a week	15%	4%	24%	15%	9%
About once a week	31%	30%	30%	35%	28%
1-3 times a month	27%	39%	24%	29%	26%
Once every 2 to 3 months	19%	21%	13%	15%	27%
Twice per year	5%	5%	6%	2%	7%

Red / Blue: Statistically significantly higher / lower than all semi-annual 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® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

ATTITUDES TOWARDS WINE

Polish wine drinkers show increasingly flexible and adventurous attitudes towards wine compared to six years ago; about half of the population enjoys trying different styles of wine on a regular basis

Attitude towards wine: Tracking

Base = All Polish semi-annual wine drinkers (n≥1,001)

	All Polish semi-annual wine drinkers	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
n=	*1,001*	*82*	*326*	*245*	*348*
I enjoy trying new and different styles of wine on a regular basis	48%	56%	58%	51%	36%
I don't mind what I buy so long as the price is right	10%	15%	12%	8%	7%
I know what I like and I tend to stick to what I know	42%	29%	30%	41%	57%

Attitudes towards wine by age

Base = All Polish semi-annual wine drinkers (n=1,001)

	2015	2018	2021	Tracking	
n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
I enjoy trying new and different styles of wine on a regular basis	38%	40%	48%	⬆	⬆
I don't mind what I buy so long as the price is right	9%	8%	10%	➡	➡
I know what I like and I tend to stick to what I know	52%	52%	42%	⬇	⬇

Red / Blue: Statistically significantly higher / lower than all semi-annual 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® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

INVOLVEMENT AND PERCEIVED EXPERTISE IN WINE

Polish consumers exhibit increasingly positive attitudes towards wine, recognising wine as an important part of their lifestyle, and having a strong interest in the category

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021		2015	2018	2021	Tracking	
	n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
1	Drinking wine gives me pleasure	82%	78%	83%	→	↑
2	I always look for the best quality wines I can get for my budget	74%	75%	76%	→	→
3	Deciding which wine to buy is an important decision	58%	63%	68%	↑	↑
4	I like to take my time when I purchase a bottle of wine	63%	63%	67%	↑	↑
5	Generally speaking, wine is reasonably priced	53%	58%	58%	↑	→
6	Wine is important to me in my lifestyle	34%	35%	46%	↑	↑
7	I have a strong interest in wine	34%	39%	45%	↑	↑
8	Compared to others, I know less about the subject of wine	36%	38%	35%	→	→
9	Generally speaking, wine is an expensive drink	29%	29%	34%	↑	↑
10	I don't understand much about wine	38%	35%	30%	↓	↓
11	I feel competent about my knowledge of wine	18%	24%	29%	↑	↑

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

INVOLVEMENT AND PERCEIVED EXPERTISE IN WINE

Involvement is similar across age groups, suggesting the increased category engagement is a broader consumer shift among all semi-annual wine drinkers

Involvement and perceived expertise in wine by age

% who 'agree' or 'strongly agree' with the following statements
Base = All Polish semi-annual wine drinkers (n=1,001)

Rank 2021		All Polish semi-annual wine drinkers	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
	n=	*1,001*	*82*	*326*	*245*	*348*
1	Drinking wine gives me pleasure	83%	83%	83%	86%	80%
2	I always look for the best quality wines I can get for my budget	76%	72%	73%	81%	75%
3	Deciding which wine to buy is an important decision	68%	56%	71%	67%	69%
4	I like to take my time when I purchase a bottle of wine	67%	68%	69%	70%	64%
5	Generally speaking, wine is reasonably priced	58%	60%	55%	66%	55%
6	Wine is important to me in my lifestyle	46%	32%	50%	52%	42%
7	I have a strong interest in wine	45%	40%	50%	47%	39%
8	Compared to others, I know less about the subject of wine	35%	39%	30%	38%	37%
9	Generally speaking, wine is an expensive drink	34%	43%	36%	36%	29%
10	I don’t understand much about wine	30%	39%	26%	34%	30%
11	I feel competent about my knowledge of wine	29%	33%	33%	32%	22%

Red / Blue: Statistically significantly higher / lower than all semi-annual wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

WINE INVOLVEMENT

Overall involvement levels in wine are increasing, with Millennials and Gen X more likely to be highly involved

Wine involvement: Tracking

Base = All Polish semi-annual wine drinkers (n≥1,001)

	2015	2018	2021	Tracking	
n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
High involvement	39%	28%	35%	→	↑
Medium involvement	32%	42%	42%	↑	→
Low involvement	29%	30%	23%	↓	↓

Wine involvement is calculated from the following variables:

1. I have strong interest wine
2. I like to take my time when I purchase a bottle of wine
3. Wine is important to me in my lifestyle
4. Drinking wine gives me pleasure

Wine involvement by age

Base = All Polish semi-annual wine drinkers (n=1,001)

	All Polish semi-annual wine drinkers	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
n=	*1,001*	*82*	*326*	*245*	*348*
High involvement	35%	32%	40%	38%	28%
Medium involvement	42%	35%	40%	45%	44%
Low involvement	23%	33%	20%	17%	27%

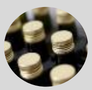
Red / Blue: Statistically significantly higher / lower than all semi-annual wine drinkers at a 95% confidence level
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

VIEWS ON WINE CLOSURES

Although natural cork remains the preferred closure, consumers are becoming more relaxed about buying screw-cap wines

Views on wine closures: Tracking

Base = All Polish semi-annual wine drinkers (n≥1,001)

Closures		2015	2018	2021	Tracking	
	n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
 Screw-cap	I don't like buying wine with this closure	48%	44%	34%	↓	↓
	Neutral	42%	41%	48%	↑	↑
	I like buying wine with this closure	10%	15%	18%	↑	↑
 Synthetic cork	I don't like buying wine with this closure	29%	31%	30%	→	→
	Neutral	63%	59%	59%	↓	→
	I like buying wine with this closure	8%	11%	11%	↑	→
 Natural cork	I don't like buying wine with this closure	3%	4%	4%	→	→
	Neutral	21%	21%	28%	↑	↑
	I like buying wine with this closure	76%	75%	68%	↓	↓

WHAT DO MARKET EXPERTS SAY?

"For many years, the traditional cork was really a crucial element of the wine. But this is changing slowly, as more quality wines are sold with screw-caps, especially wines from Germany; Riesling is one of the most popular grape varieties in Poland"

Wine PR Agency Director, Poland

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

Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

WINE CONFIDENCE AND KNOWLEDGE INDEX

In line with global trends, knowledge levels have remained stable since 2015 despite significant growth in category confidence

Wine **knowledge** index: Tracking

Wine knowledge index (0-100) is calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands
Base = All Polish semi-annual wine drinkers (n≥1,001)

	2015	Index change	2021
All Polish regular wine drinkers	30.4	+0.7	31.1

Wine **confidence** index: Tracking

Wine confidence index (0-100) is calculated based on the extent to which consumers feel competent about their wine knowledge
Base = All Polish semi-annual wine drinkers (n≥1,001)

	2015	Index change	2021
All Polish regular wine drinkers	43.9	+5.1	49.0 ⬆

WHAT DO MARKET EXPERTS SAY?

"The average consumer has a passing interest in learning about wine but there is a strong drive towards wine education for the smaller segment of those really interested in the category"

Wine Writer, Poland

Wine knowledge index is the **"objective"** measurement of consumer knowledge about wine

Wine confidence index is the **"subjective"** measurement of consumer confidence 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

⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

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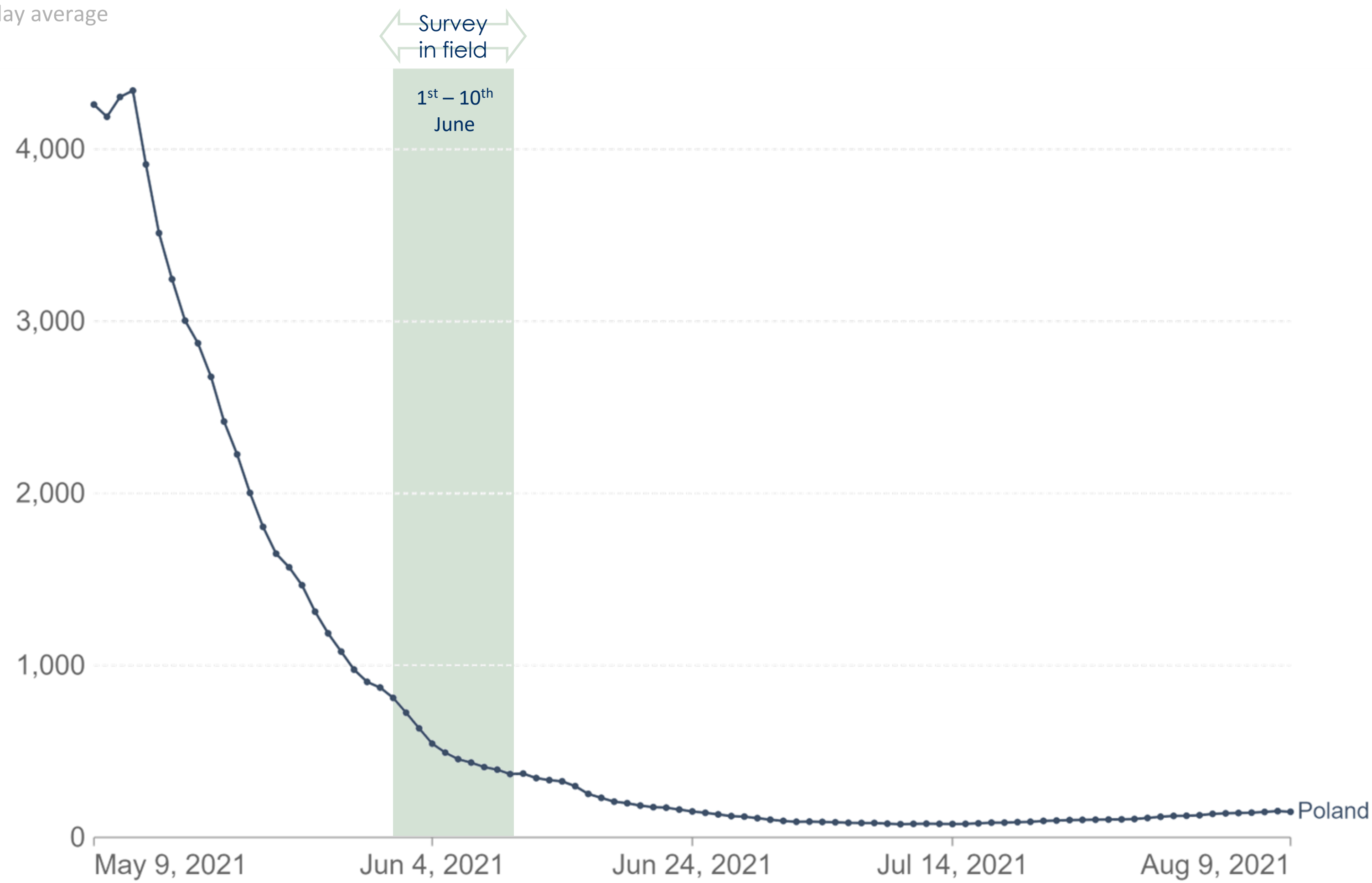
TIMELINE CONTEXT DURING SURVEY DATA COLLECTION 2021

Survey data for this report was collected during a steep decline in COVID-19 cases in Poland

Daily new confirmed COVID-19 cases in Poland

7-day average



Source: Poland: Coronavirus Pandemic Country Profile - Our World in Data (updated 10.08.2021)

PANDEMIC PERSONAL IMPACT

Gen Z has been the most affected by the pandemic in terms of knowing someone who had Coronavirus or having it themselves; they also have experienced the highest loss of employment compared to other age groups

Pandemic personal impact

'% who have been personally impacted by the recent Coronavirus pandemic in the following ways
Base = All Polish semi-annual wine drinkers (n=1,001)

	All Polish semi-annual wine drinkers	19-24 Gen Z	25-39 Millennials	40-54 Gen X	55-64 Boomers
n=	*1,001*	*82*	*326*	*245*	*348*
A member of my family or close friend has had Coronavirus	45%	61%	45%	48%	39%
Significant life plans have had to change	28%	36%	27%	32%	25%
I have had Coronavirus	17%	31%	20%	17%	12%
I or someone in my household is in a vulnerable group and I have been shielding at home	12%	9%	7%	8%	20%
I have been made unemployed	6%	12%	6%	8%	4%
The main income earner in my household has been made unemployed	6%	9%	8%	5%	4%
I am on a job retention scheme	3%	4%	4%	4%	1%

Red / Blue: Statistically significantly higher / lower than all semi-annual wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

ATTITUDES TOWARDS SAFETY

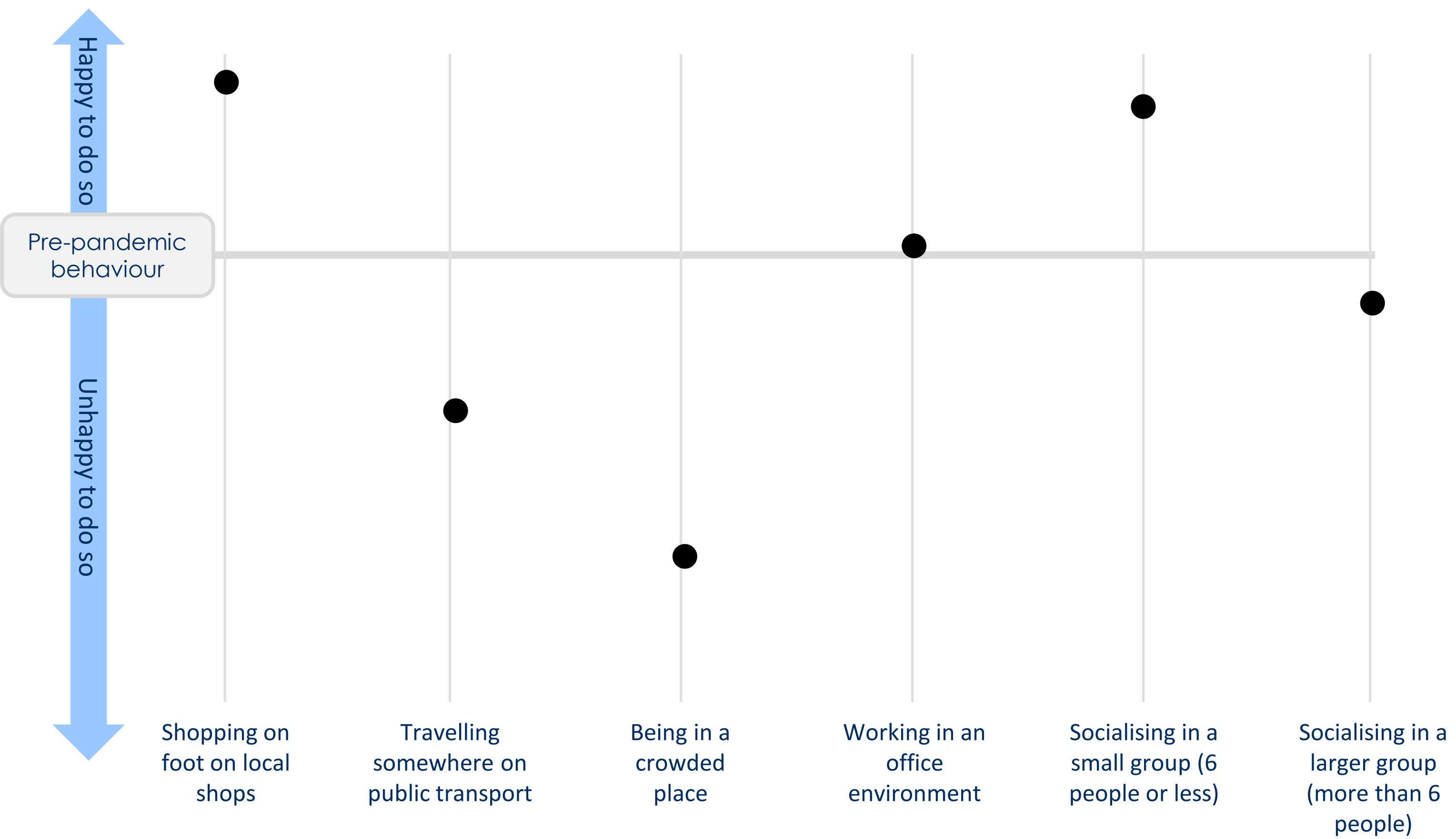
Polish wine consumers are more comfortable with activities involving fewer people compared with pre-pandemic

● All Polish semi-annual wine drinkers

No significant variance by gender

Attitudes towards safety: June 2021 vs pre-pandemic behaviour

Indexed perceptions of doing each activity at the moment



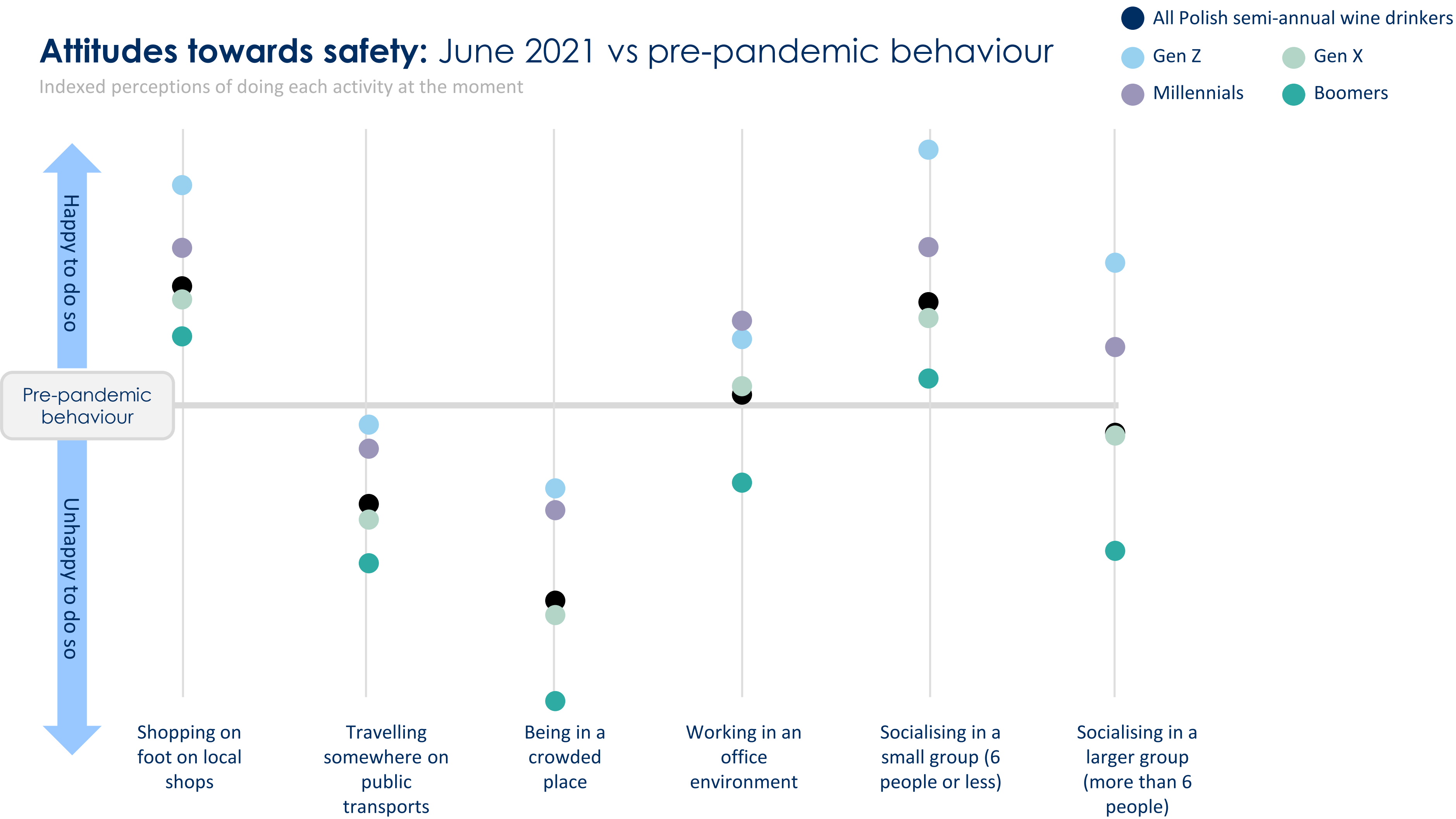
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

ATTITUDES TOWARDS SAFETY

More disparity between age groups, with Gen Z happier to seek out social interaction, although broader trends remain the same

Attitudes towards safety: June 2021 vs pre-pandemic behaviour

Indexed perceptions of doing each activity at the moment



Gen Z: 19-24 / Millennials: 25-39 / Gen X: 40-54 / Boomers: 55-64

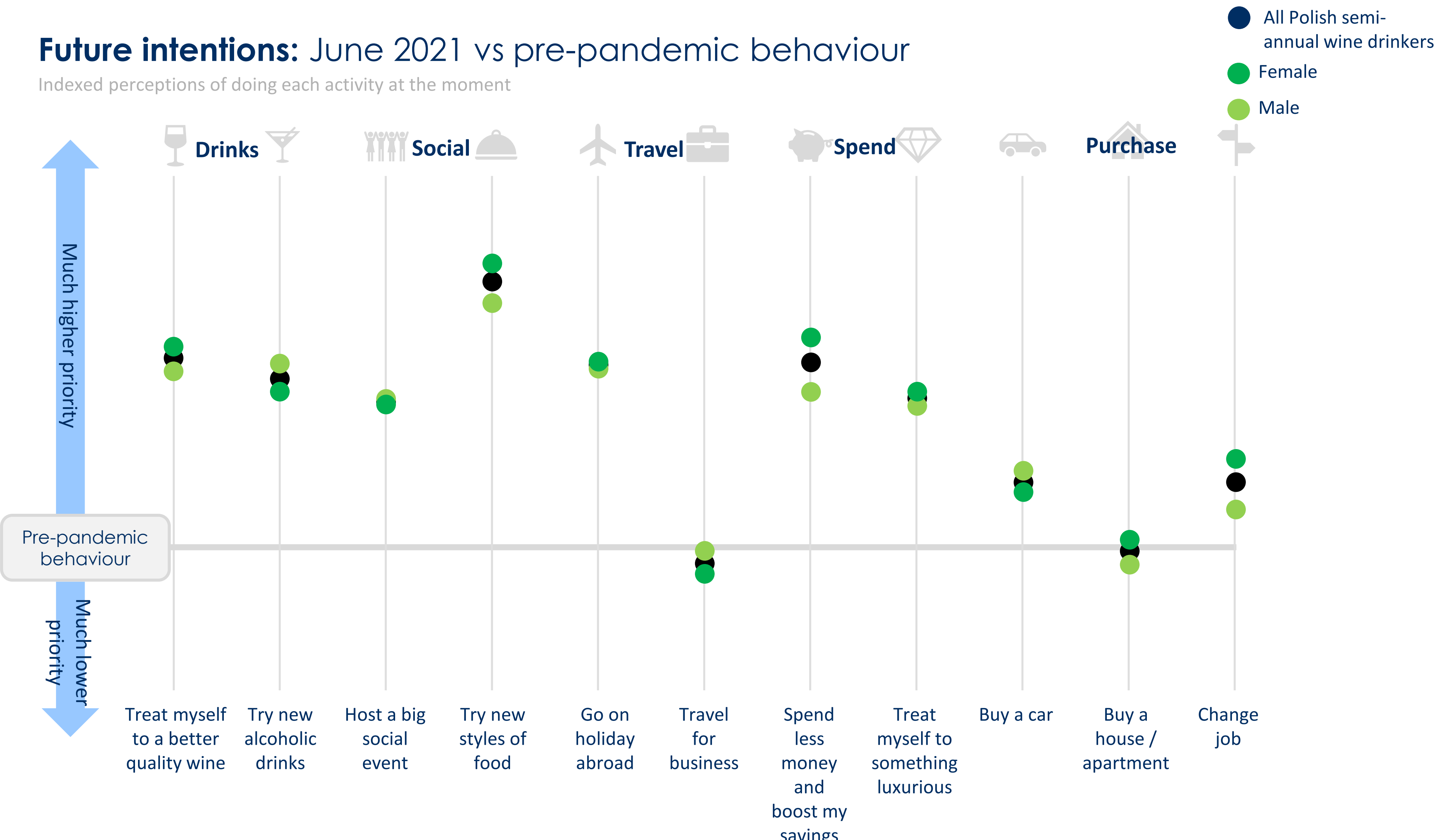
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

FUTURE BEHAVIOUR PRIORITIES

Polish wine drinkers are prioritising treats, including discovering new styles of food and drinks. Trend is similar between genders

Future intentions: June 2021 vs pre-pandemic behaviour

Indexed perceptions of doing each activity at the moment



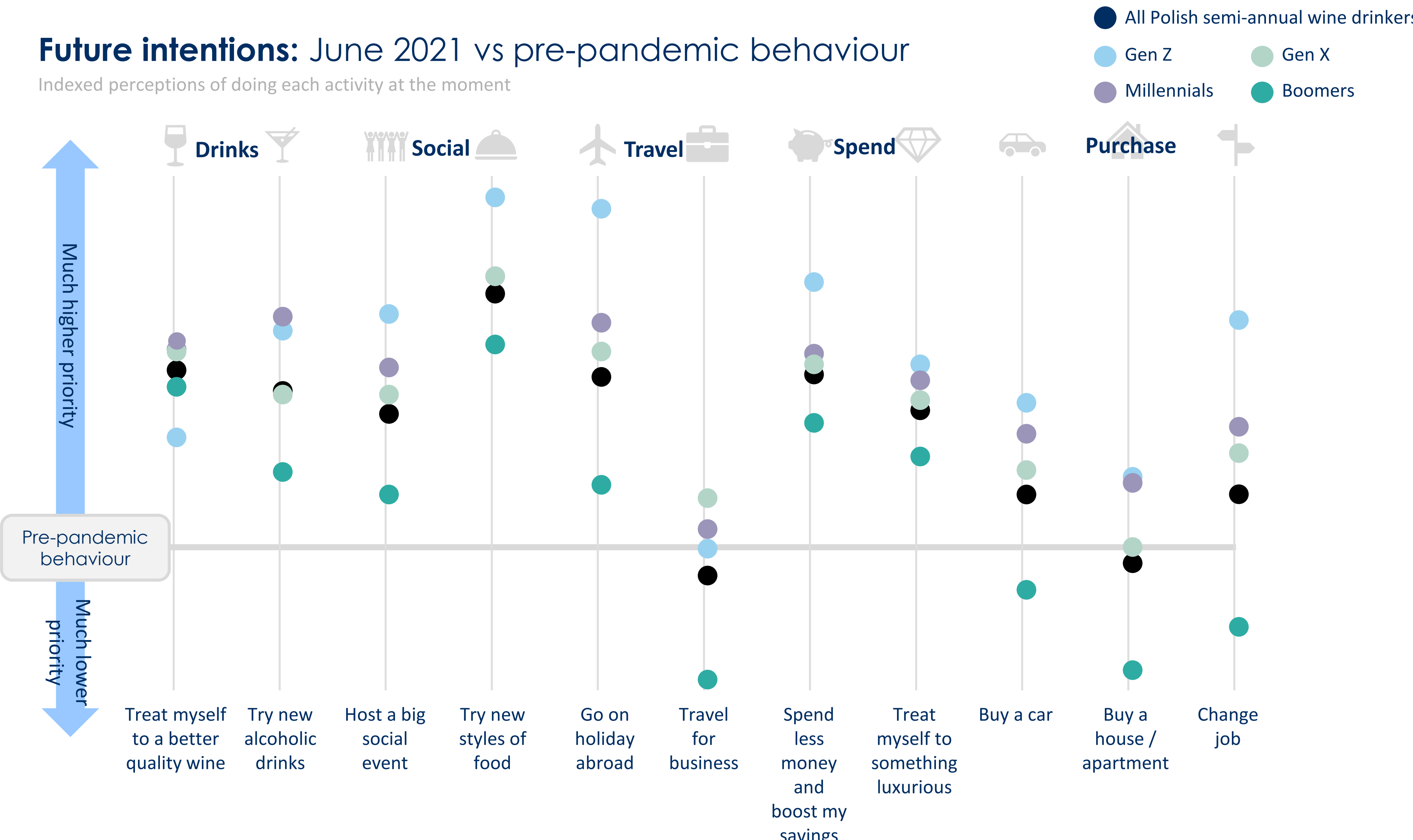
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

FUTURE BEHAVIOUR PRIORITIES

Gen Z is generally more inclined prioritise most activities amongst all generational groups, apart from spending more on wine

Future intentions: June 2021 vs pre-pandemic behaviour

Indexed perceptions of doing each activity at the moment



Gen Z: 19-24 / Millennials: 25-39 / Gen X: 40-54 / Boomers: 55-64

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

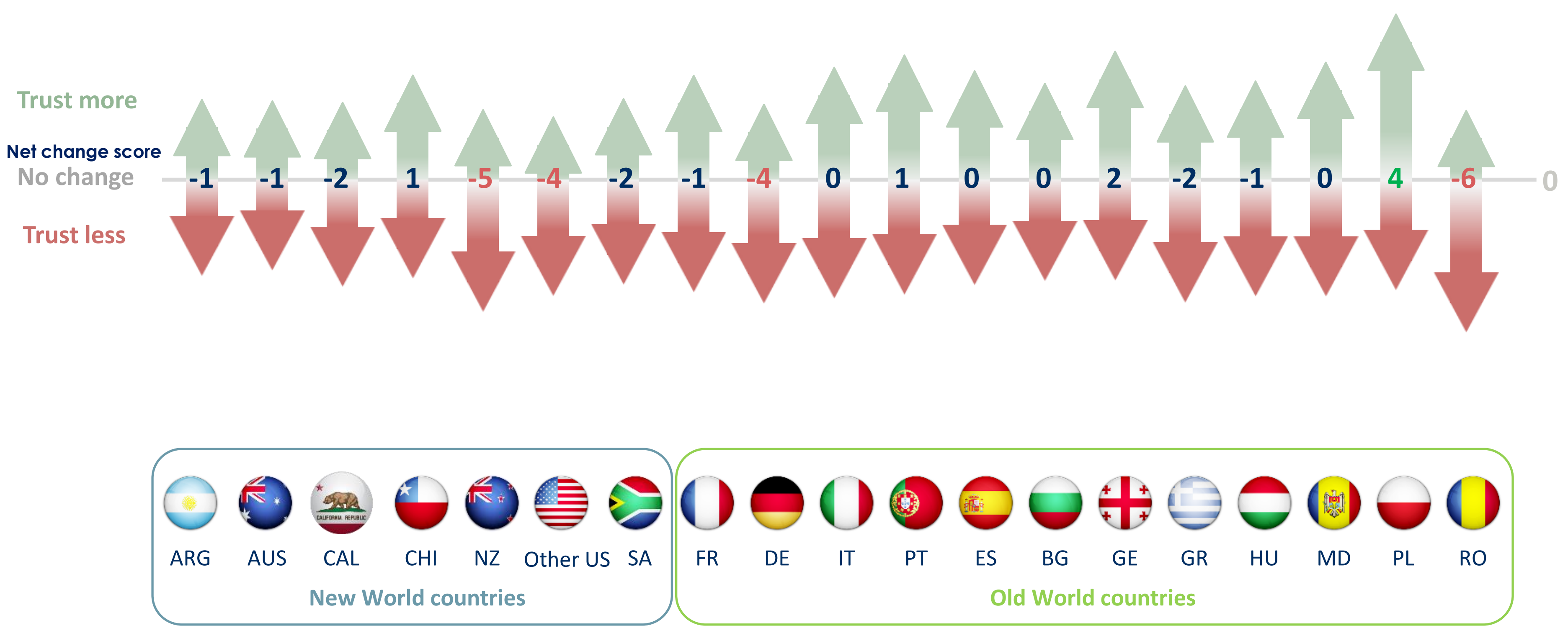
COUNTRY OF ORIGIN: CHANGE IN TRUST

Polish wine consumers' trust levels have remain broadly stable whilst domestically produced wine has seen a small boost in trust, in line with global trends

Change in trust of wine origins during June 2021 compared with pre-pandemic behaviour

Base = Those who have heard of each wine-producing place

Net change score = % consumers who trust wine from this country more than they used to minus % consumers who trust wine from this country less than they used to



Green / red: Net change score of above 3 / below 3

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

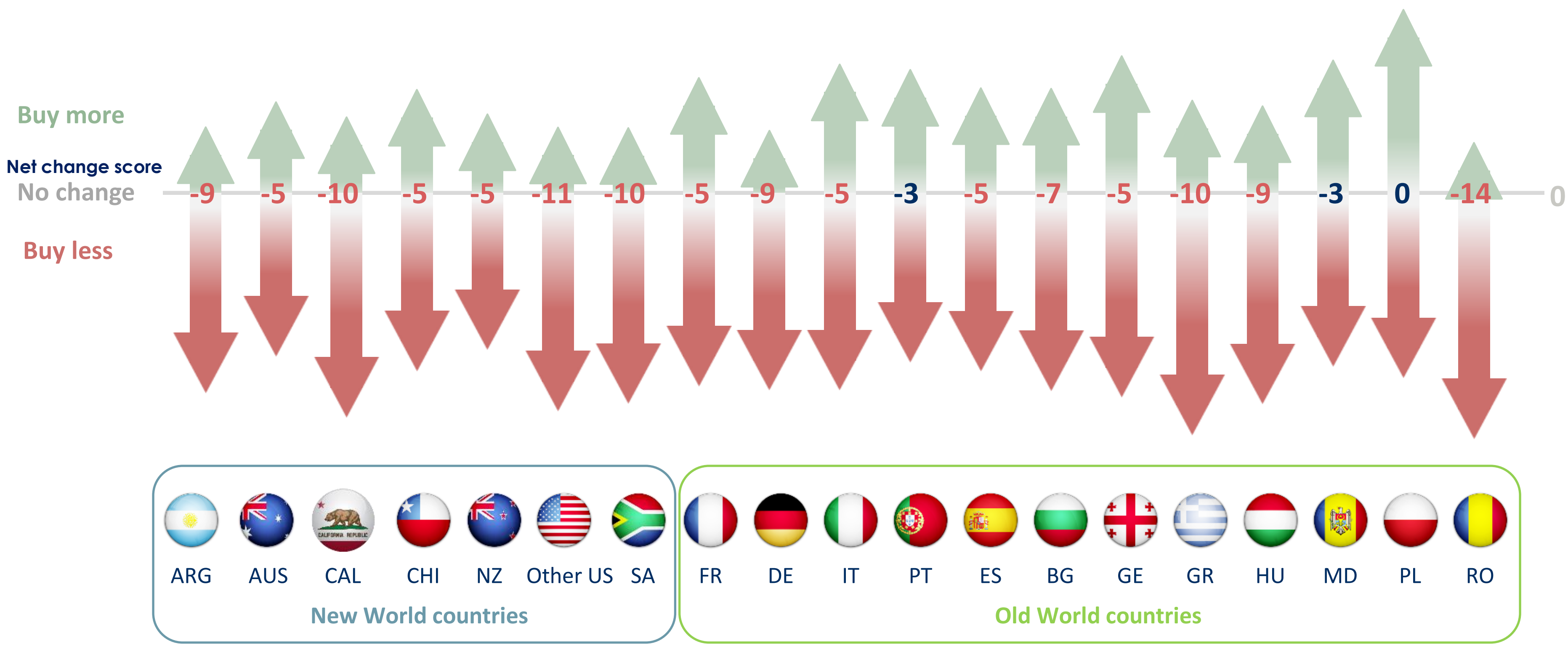
COUNTRY OF ORIGIN: CHANGE IN PURCHASE

Recalled purchase levels have decreased across all mainstream origins during the pandemic despite stable levels of trust

Change in purchase of wine origins during June 2021 compared with pre-pandemic behaviour

Base = Those who have heard of each wine-producing place

Net change score = % consumers who buy more wine from this country minus % consumers who buy less wine from this country



Green / red: Net change score of above 3 / below 3

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

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ALCOHOLIC BEVERAGE REPERTOIRE

Increases in recalled usage for beer, Champagne, Prosecco and RTDs amongst Polish wine drinkers whilst white wine, rosé and sweet wine have experienced the opposite trend

Alcoholic beverage repertoire: Tracking

% who have drunk the following beverages in the past 12 months
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021		2015	2018	2021	Tracking	
	n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
1	Red wine	88%	89%	90%	→	→
2	Beer	79%	86%	86%	↑	→
3	Vodka	n/a	71%	70%	n/a	→
4	White wine	71%	68%	65%	↓	→
5	Whisky / Whiskey	n/a	54%	60%	n/a	↑
6	Champagne (French Champagne)	51%	62%	59%	↑	→
7	Sweet / dessert wine	52%	47%	45%	↓	→
8	Rosé wine	48%	40%	35%	↓	↓
9	Liqueurs	34%	33%	34%	→	→
10	Craft beer	n/a	32%	33%	n/a	→
11	Cider	38%	41%	33%	↓	↓
12	Prosecco	7%	17%	32%	↑	↑
13	Brandy / Cognac	n/a	28%	29%	n/a	→
14	Pre-mixed / ready to drink alcoholic beverages	20%	23%	25%	↑	→
15	Rum	21%	23%	24%	→	→
16	Cocktails	n/a	25%	24%	n/a	→
17	Gin	n/a	22%	23%	n/a	→
18	Other sparkling wine	29%	21%	19%	↓	→
19	Port	11%	13%	14%	↑	→
20	Sherry	14%	11%	14%	→	→
21	Cava	9%	8%	10%	→	↑

WHAT DO MARKET EXPERTS SAY?

"Most dry wines distributed in Poland are of poor quality, but this is changing, and dry wine is getting points and going up while semi-sweet and semi-dry styles are going down slowly"

Wine PR Agency Director, Poland

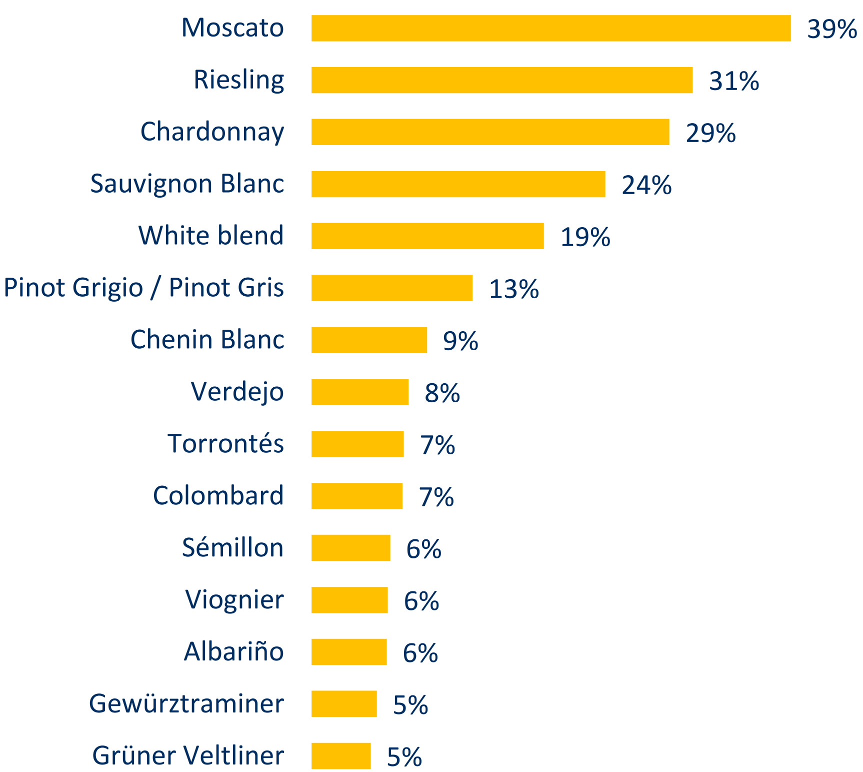
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

VARIETAL CONSUMPTION

Popular and international varietals top Polish consumers' repertoires

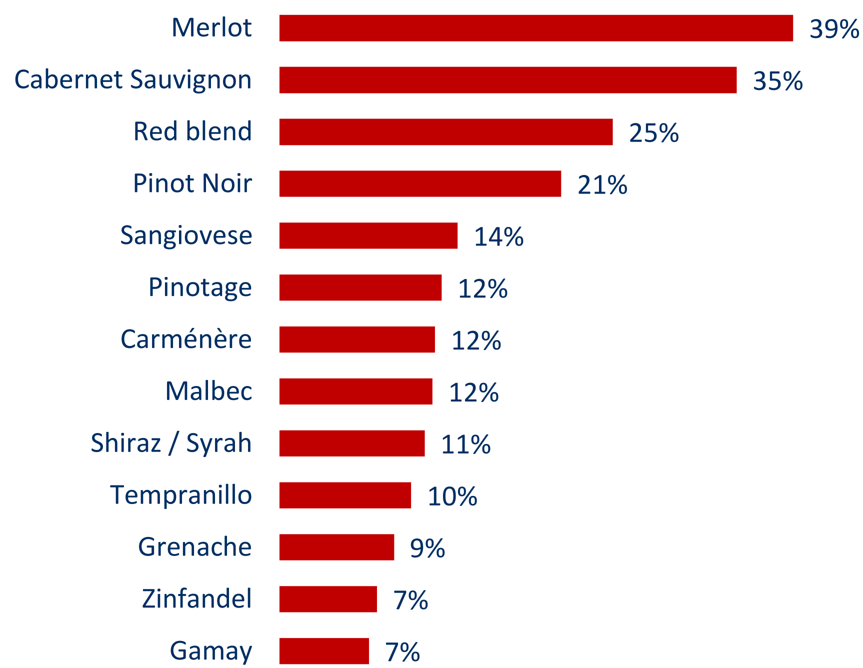
White varietal consumption

% who have drunk the following varietals or wine types in the past 6 months
Base = All Polish semi-annual wine drinkers (n=1,001)



Red varietal consumption

% who have drunk the following varietals or wine types in the past 6 months
Base = All Polish semi-annual wine drinkers (n=1,001)



Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

WHITE VARIETAL CONSUMPTION

Increase in consumption for both the top varietals as well as some lesser-known ones since 2015 as category knowledge increases

White varietal **consumption**: Tracking

% who have drunk the following varietals or wine types in the past 6 months
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021		2015	2018	2021	Tracking	
	n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
1	Moscato	28%	39%	39%	↑	→
2	Riesling	24%	27%	31%	↑	↑
3	Chardonnay	28%	32%	29%	→	→
4	Sauvignon Blanc	21%	20%	24%	→	↑
5	White blend	n/a	19%	19%	n/a	→
6	Pinot Grigio / Pinot Gris	12%	13%	13%	→	→
7	Chenin Blanc	8%	11%	9%	→	→
8	Verdejo	6%	9%	8%	→	→
9=	Torrontés	6%	8%	7%	→	→
9=	Colombard	5%	7%	7%	↑	→
11=	Sémillon	5%	7%	6%	→	→
11=	Viognier	4%	6%	6%	↑	→
11=	Albariño	3%	5%	6%	↑	→
14=	Gewürztraminer	4%	5%	5%	→	→
14=	Grüner Veltliner	4%	5%	5%	→	→
	Other	2%	5%	5%	↑	→
	Don't know	35%	19%	15%	↓	↓

WHAT DO MARKET EXPERTS SAY?

"We do see especially in the premium segment, a significant shift of attention towards modern varietals such as Riesling and Pinot Noir"

Wine Writer, Poland

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

RED VARIETAL CONSUMPTION

In line with white varietals, increases in the consumption of both well- and lesser-known styles compared with 2015 as more consumers recall what they have drunk recently

Red varietal **consumption**: Tracking

% who have drunk the following varietals or wine types in the past 6 months
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021	*n=*	2015 *1,008*	2018 *2,000*	2021 *1,001*	Tracking vs. '15	Tracking vs. '18
1	Merlot	35%	39%	39%	↑	→
2	Cabernet Sauvignon	35%	32%	35%	→	→
3	Red blend	n/a	26%	25%	n/a	→
4	Pinot Noir	19%	21%	21%	→	→
5	Sangiovese	9%	10%	14%	↑	↑
6=	Pinotage	11%	13%	12%	→	→
6=	Carménère	9%	11%	12%	↑	→
6=	Malbec	10%	11%	12%	→	→
9	Shiraz / Syrah	11%	11%	11%	→	→
10	Tempranillo	8%	10%	10%	→	→
11	Grenache	7%	8%	9%	→	→
12=	Zinfandel	6%	7%	7%	→	→
12=	Gamay	4%	6%	7%	↑	→
	Other	2%	6%	7%	↑	→
	Don't know	37%	20%	18%	↓	→

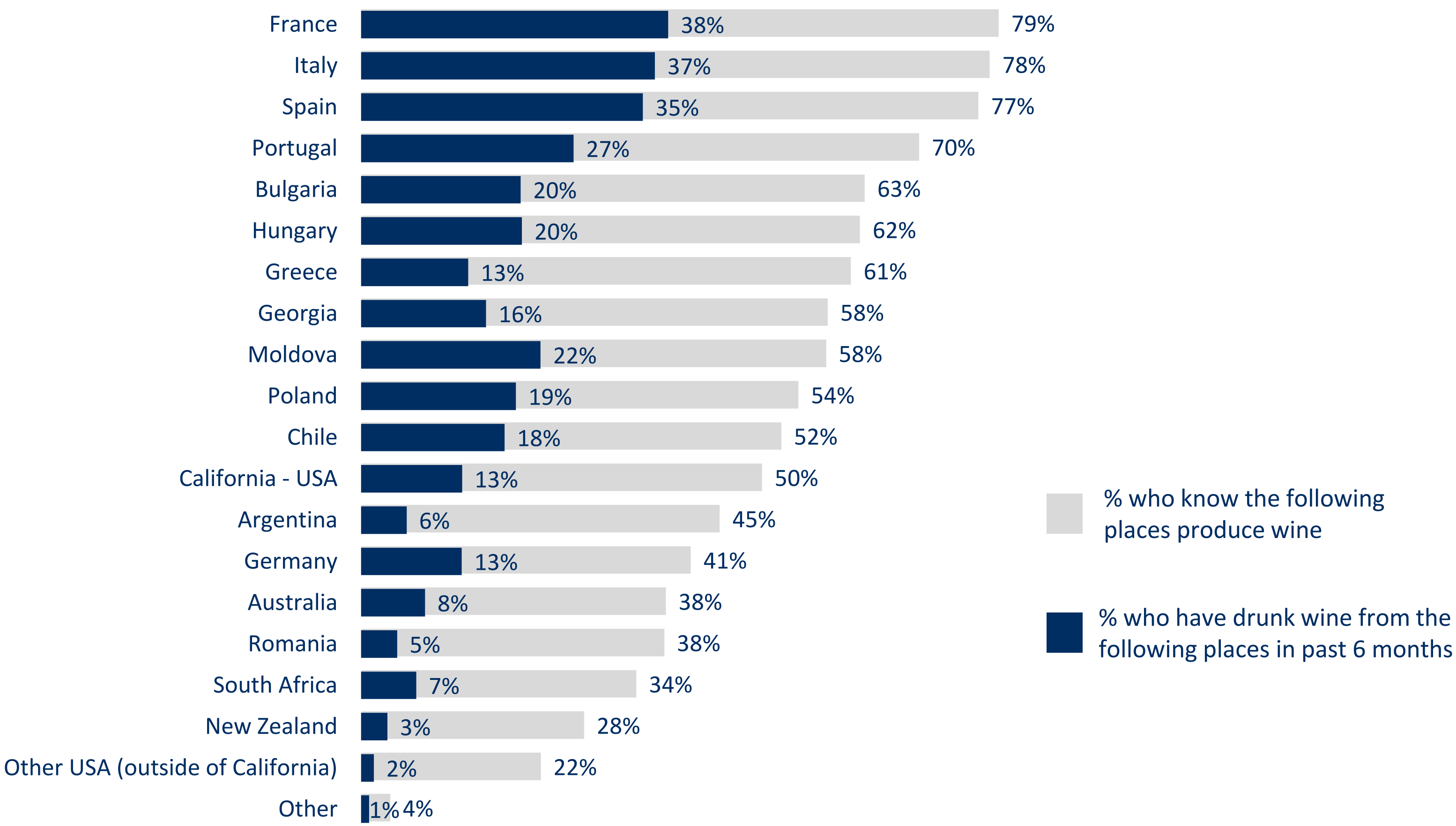
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

COUNTRY OF ORIGIN AWARENESS AND CONSUMPTION

Top performing places of origin in the Polish wine markets are Old World countries: France, Italy, Spain and Portugal – all exhibiting high consumption / awareness ratios

Country of origin **awareness** and respective **consumption** level

Base = All Polish semi-annual wine drinkers (n=1,001)



Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

COUNTRY OF ORIGIN AWARENESS

In line with increased category knowledge, general awareness of countries of origin has also increased since 2015

Country of origin **awareness**: Tracking

% who know the following places produce wine
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021	*n=*	2015 *1,008*	2018 *2,000*	2021 *1,001*	Tracking vs. '15	Tracking vs. '18
1	France	73%	80%	79%	↑	→
2	Italy	67%	76%	78%	↑	→
3	Spain	72%	78%	77%	↑	→
4	Portugal	58%	71%	70%	↑	→
5	Bulgaria	58%	64%	63%	↑	→
6	Hungary	53%	61%	62%	↑	→
7	Greece	n/a	n/a	61%	n/a	n/a
8=	Georgia	40%	53%	58%	↑	↑
8=	Moldova	43%	51%	58%	↑	↑
10	Poland	38%	53%	54%	↑	→
11	Chile	47%	52%	52%	↑	→
12	California - USA	44%	50%	50%	↑	→
13	Argentina	36%	42%	45%	↑	→
14	Germany	29%	39%	41%	↑	→
15=	Australia	30%	36%	38%	↑	→
15=	Romania	n/a	33%	38%	n/a	↑
17	South Africa	26%	32%	34%	↑	→
18	New Zealand	14%	22%	28%	↑	↑
19	Other USA (outside of California)	7%	19%	22%	↑	↑
	Other	2%	3%	4%	↑	→
	Don't know	6%	4%	4%	↓	→

WHAT DO MARKET EXPERTS SAY?

"Moldavian and Georgian wine have grown more popular; because of the price-point but also because they are holiday-destinations and people are becoming more interested in these regions"

Wine Market Researcher, Poland

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

COUNTRY OF ORIGIN CONSUMPTION

General stability in terms of country consumption despite a backdrop of increased awareness

Country of origin **consumption**: Tracking

% who have drunk wine from the following places in the past 6 months
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021	*n=*	2015 *1,008*	2018 *2,000*	2021 *1,001*	Tracking vs. '15	Tracking vs. '18
1	France	34%	41%	38%	→	→
2	Italy	27%	35%	37%	↑	→
3	Spain	33%	36%	35%	→	→
4	Portugal	23%	27%	27%	↑	→
5	Moldova	17%	19%	22%	↑	→
6=	Hungary	19%	19%	20%	→	→
6=	Bulgaria	22%	22%	20%	→	→
8	Poland	13%	18%	19%	↑	→
9	Chile	19%	21%	18%	→	↓
10	Georgia	7%	14%	16%	↑	→
11=	Greece	n/a	n/a	13%	n/a	n/a
11=	California - USA	14%	17%	13%	→	↓
11=	Germany	11%	12%	13%	→	→
14	Australia	9%	7%	8%	→	→
15	South Africa	6%	7%	7%	→	→
16	Argentina	9%	7%	6%	↓	→
17	Romania	n/a	3%	5%	n/a	→
18	New Zealand	2%	2%	3%	→	→
19	Other USA (outside of California)	1%	2%	2%	→	→
	Other	1%	1%	1%	→	→
	None of these	11%	3%	2%	↓	→

WHAT DO MARKET EXPERTS SAY?

"For many years, drinking Polish wine was something exotic but they are now becoming more and more fashionable. Every good restaurant in Poland has the ambition to offer Polish wine on their wine list"

Wine PR Agency Director, Poland

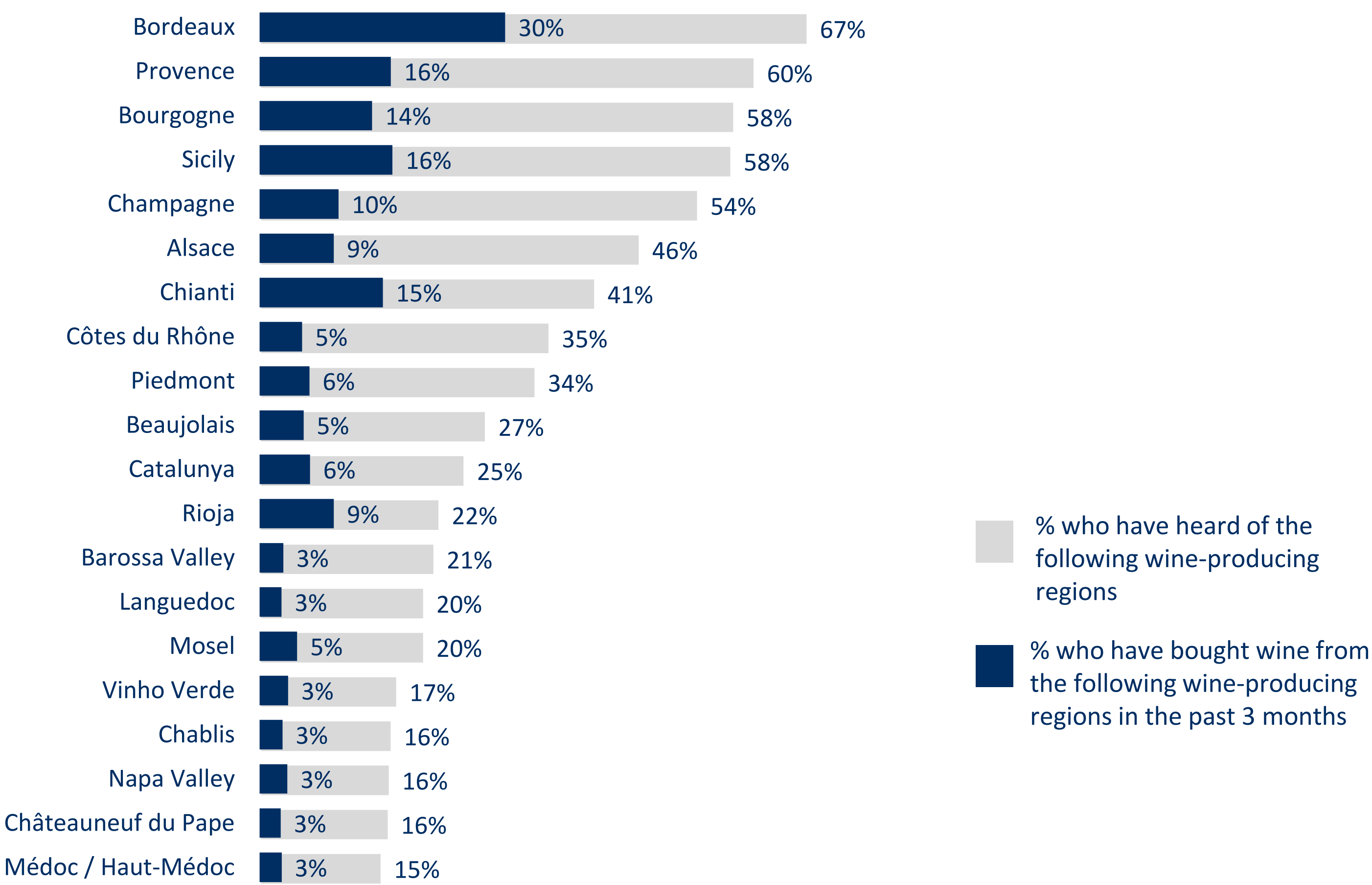
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

REGION OF ORIGIN AWARENESS AND PURCHASE

Bordeaux is leading in term of both awareness and purchase incidences; similar observation for Rioja which has the second highest ratio

Region of origin **awareness** and respective **purchase** level: Top 20

Base = All Polish semi-annual wine drinkers (n=1,001)



Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

REGION OF ORIGIN AWARENESS

Significant growth in awareness levels for some regions in the top 20, especially Sicily and Côtes du Rhône

Region of origin **awareness**: Top 20 tracking

% who have heard of the following wine-growing regions
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021	*n=*	2015 *1,008*	2018 *2,000*	2021 *1,001*	Tracking vs. '15	Tracking vs. '18
1	Bordeaux	69%	67%	67%	→	→
2	Provence	58%	59%	60%	→	→
3=	Bourgogne	56%	55%	58%	→	→
3=	Sicily	45%	54%	58%	↑	→
5	Champagne	54%	53%	54%	→	→
6	Alsace	43%	43%	46%	→	↑
7	Chianti	39%	40%	41%	→	→
8	Côtes du Rhône	23%	29%	35%	↑	↑
9	Piedmont	27%	31%	34%	↑	→
10	Beaujolais	26%	26%	27%	→	→
11	Catalunya	48%	22%	25%	↓	→
12	Rioja	18%	20%	22%	↑	→
13	Barossa Valley	14%	19%	21%	↑	→
14=	Languedoc	16%	16%	20%	↑	↑
14=	Mosel	n/a	18%	20%	n/a	→
16	Vinho Verde	13%	13%	17%	↑	↑
17=	Chablis	17%	15%	16%	→	→
17=	Napa Valley	14%	16%	16%	→	→
17=	Châteauneuf du Pape	13%	14%	16%	→	→
20	Médoc / Haut-Médoc	17%	14%	15%	→	→

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

REGION OF ORIGIN PURCHASE

Purchase incidence is narrow amongst the regions outside of the top 5; all Italian regions have experienced significant growth in purchase since 2015

Region of origin **purchase**: Top 20 tracking

% who have bought wine from the following wine-producing regions in the past 3 months
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021		2015	2018	2021	Tracking	
	n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
1	Bordeaux	27%	30%	30%	→	→
2=	Sicily	10%	14%	16%	↑	↑
2=	Provence	11%	13%	16%	↑	↑
4	Chianti	11%	14%	15%	↑	→
5	Bourgogne	11%	13%	14%	→	→
6	Champagne	10%	12%	10%	→	→
7=	Rioja	7%	6%	9%	→	↑
7=	Alsace	5%	7%	9%	↑	↑
9=	Catalunya	10%	5%	6%	↓	→
9=	Piedmont	4%	5%	6%	↑	→
11=	Beaujolais	5%	5%	5%	→	→
11=	Côtes du Rhône	3%	4%	5%	↑	→
11=	Mosel	n/a	4%	5%	n/a	→
14=	Vinho Verde	3%	3%	3%	→	→
14=	Napa Valley	2%	3%	3%	→	→
14=	Barossa Valley	2%	3%	3%	→	→
14=	Chablis	3%	2%	3%	→	→
14=	Tejo	n/a	2%	3%	n/a	→
14=	Douro	2%	2%	3%	→	↑
14=	Médoc / Haut-Médoc	4%	3%	3%	↓	→

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

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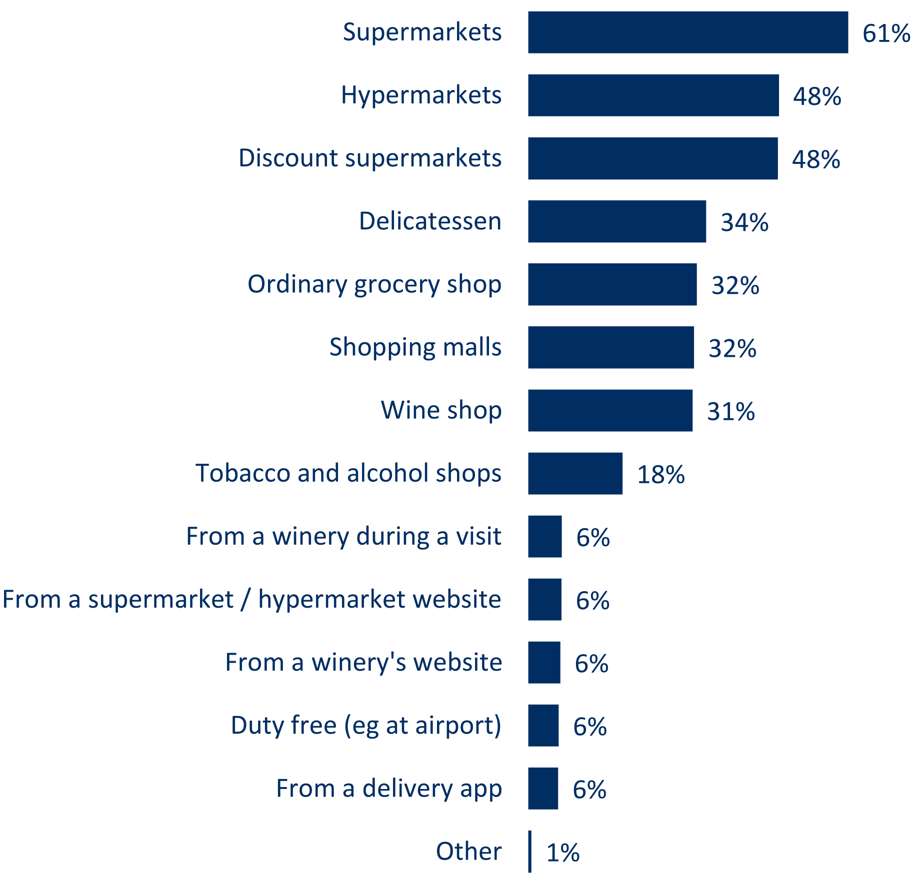
WINE-BUYING CHANNEL USAGE

Supermarkets and hypermarkets drive wine sales in Poland with few consumers buying wine in specialised wine channels

Wine-buying channel usage

% who have bought wine from the following channels in the past 6 months
Base = All Polish semi-annual wine drinkers (n=1,001)



Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

WINE-BUYING CHANNEL USAGE

Supermarkets remain the primary wine-buying channel in Poland, whilst the proportion of consumers who shop in discount supermarkets has grown significantly since 2015

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past 6 months
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank		2015	2018	2021	Tracking	
2021	*n=*	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
1	Supermarkets	61%	60%	61%	➡	➡
2=	Hypermarkets	50%	49%	48%	➡	➡
2=	Discount supermarkets	39%	40%	48%	⬆	⬆
4	Delicatessen	n/a	35%	34%	n/a	➡
5=	Ordinary grocery shop	32%	32%	32%	➡	➡
5=	Shopping malls	33%	35%	32%	➡	➡
7	Wine shop	32%	34%	31%	➡	➡
8	Tobacco and alcohol shops	19%	20%	18%	➡	➡
9=	From a winery during a visit	n/a	n/a	6%	n/a	n/a
9=	From a supermarket / hypermarket we	n/a	n/a	6%	n/a	n/a
9=	From a winery's website	n/a	n/a	6%	n/a	n/a
9=	Duty free (eg at airport)	5%	6%	6%	➡	➡
9=	From a delivery app	n/a	n/a	6%	n/a	n/a
	Other	1%	2%	1%	➡	⬇

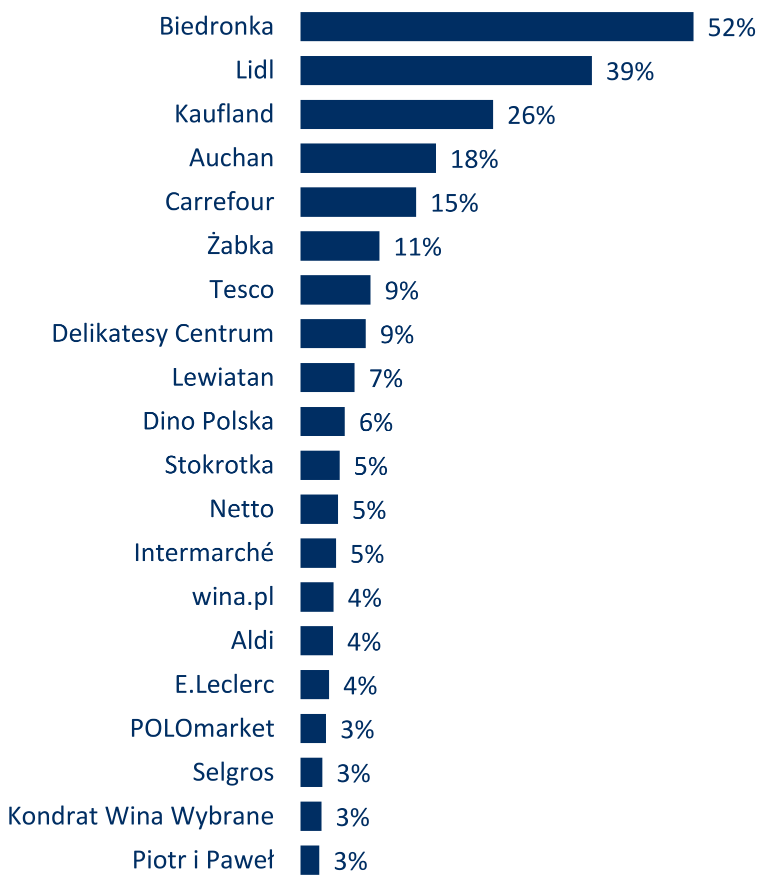
⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

WINE-BUYING RETAILER USAGE

More than half of Polish consumers choose to buy their wine at Biedronka, the largest chain of discount stores in Poland; retailer usage is narrow outside of the top 5

Wine-buying retailer usage: Top 20

% who mainly use the following retailers to buy wine
Base = Those who buy wine in the off-trade



Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

WINE-BUYING RETAILER USAGE

Significant growth in the proportion of consumers who buy wine from the top 3 retailers since 2015; whilst Tesco has lost a large proportion of the market share over the same interval

Retailer usage: Top 20 tracking

% who mainly use the following retailers to buy wine
Base = Those who buy wine in the off-trade

Rank 2021	n=	2015 *1,008*	2018 *2,000*	2021 *1,001*	Tracking vs. '15	Tracking vs. '18
1	Biedronka	46%	47%	52%	⬆	⬆
2	Lidl	32%	32%	39%	⬆	⬆
3	Kaufland	16%	22%	26%	⬆	⬆
4	Auchan	16%	18%	18%	➡	➡
5	Carrefour	16%	18%	15%	➡	➡
6	Żabka	8%	12%	11%	➡	➡
7=	Tesco	32%	25%	9%	⬇	⬇
7=	Delikatesy Centrum	n/a	n/a	9%	n/a	n/a
9	Lewiatan	5%	7%	7%	➡	➡
10	Dino Polska	n/a	n/a	6%	n/a	n/a
11=	Stokrotka	n/a	n/a	5%	n/a	n/a
11=	Netto	5%	5%	5%	➡	➡
11=	Intermarché	6%	6%	5%	➡	➡
14=	wina.pl	3%	3%	4%	➡	➡
14=	Aldi	2%	3%	4%	⬆	⬆
14=	E.Leclerc	6%	4%	4%	⬇	➡
17=	POLOmarket	3%	3%	3%	➡	➡
17=	Selgros	3%	2%	3%	➡	➡
17=	Kondrat Wina Wybrane	3%	2%	3%	➡	➡
17=	Piotr i Paweł	n/a	8%	3%	n/a	⬇

⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

WINE-BUYING CHOICE CUES

Wine sweetness levels, brand and price are the top choice cues for Polish wine drinkers

Wine-buying choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Polish semi-annual wine drinkers (n=1,001)

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

WINE-BUYING CHOICE CUES

In line with increased involvement in the wine category, higher proportions of Polish consumers look to a variety of cues when buying wine compared to 2015

Wine-buying choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021	n=	2015 1,008	2018 2,000	2021 1,001	Tracking vs. '15	Tracking vs. '18
1	Signs about how sweet the wine is	84%	87%	88%	⬆	➡
2	A brand I am aware of	78%	81%	79%	➡	➡
3=	Price	82%	77%	78%	➡	➡
3=	Taste or wine style descriptions displayed on the shelves or on wine labels	n/a	79%	78%	n/a	➡
5	The country of origin (eg France, Australia, Spain, Chile, USA, etc)	62%	65%	70%	⬆	⬆
6	Recommendation by friend or family	69%	72%	69%	➡	➡
7	The region of origin	56%	60%	64%	⬆	⬆
8	Promotional offer (eg price discount or 3 for the price of 2)	58%	57%	62%	⬆	⬆
9	Alcohol content	43%	53%	57%	⬆	⬆
10	Wine that matches or complements food	n/a	56%	56%	n/a	➡
11	Grape variety (eg Cabernet Sauvignon, Chardonnay, etc)	43%	49%	52%	⬆	➡
12	Recommendations from shop staff or shop leaflets	32%	44%	45%	⬆	➡
13=	Recommendation by wine guide books	39%	42%	44%	⬆	➡
13=	Appeal of the bottle and / or label design	37%	44%	44%	⬆	➡
13=	Recommendation by wine critic or writer	38%	42%	44%	⬆	➡
16	Whether or not the wine has won a medal or award	25%	29%	33%	⬆	⬆

⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

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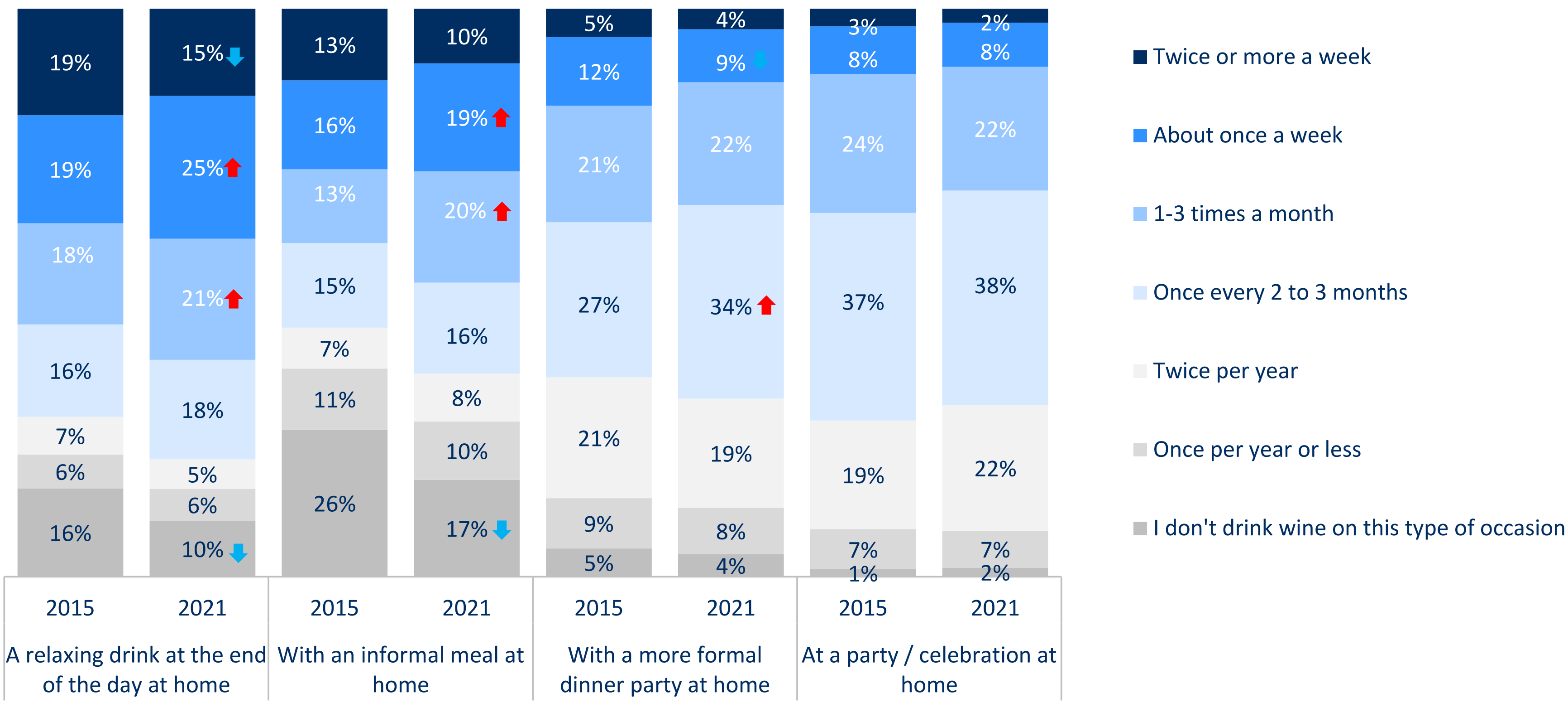
OFF-TRADE: WINE CONSUMPTION FREQUENCY BY OCCASION

Volume growth in Poland coming from increasing participation rates for informal wine-drinking occasions, as well as net growth in consumption frequency

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade



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

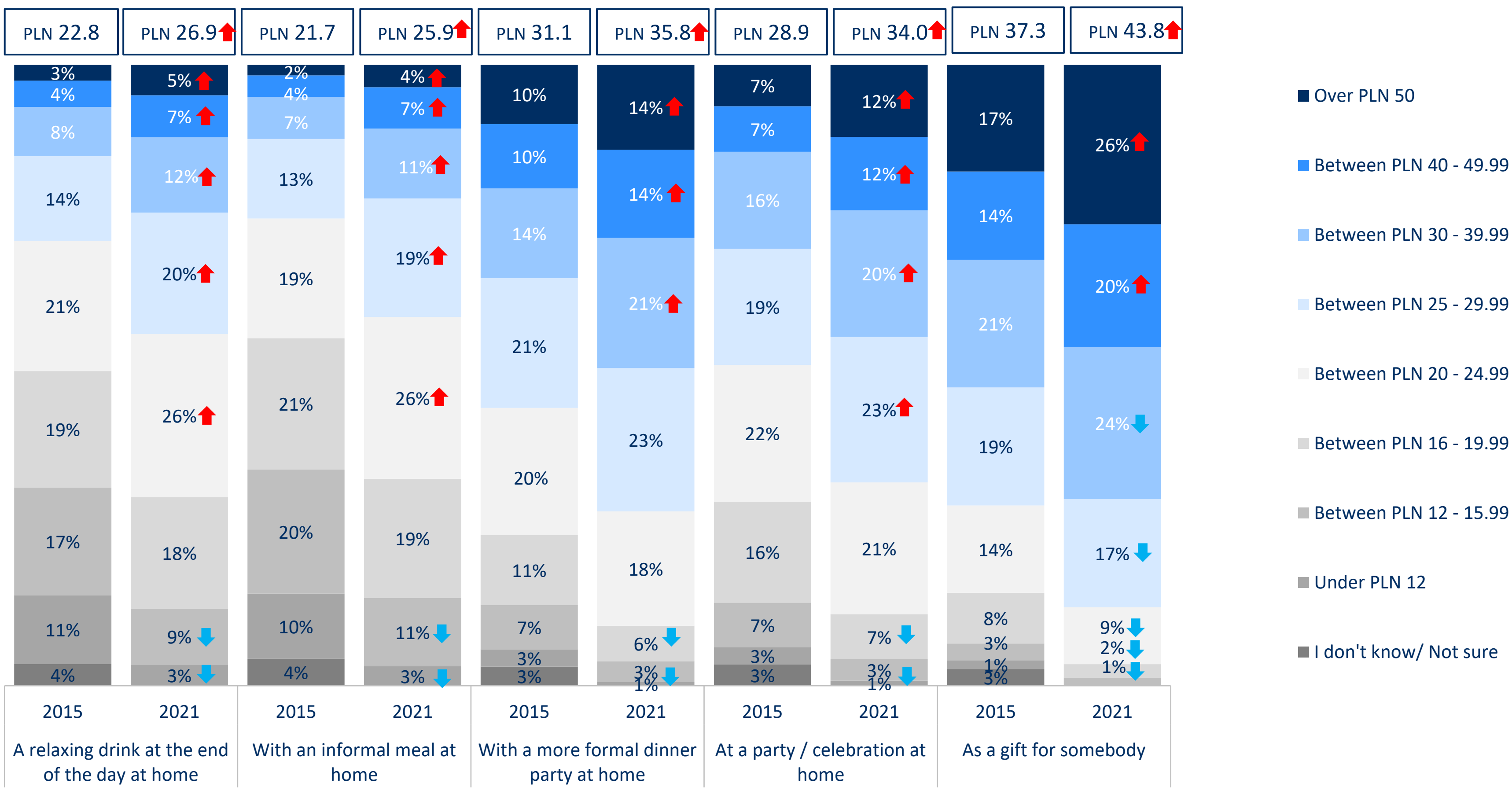
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

OFF-TRADE: SPEND ON WINE BY OCCASION

Recalled spend per bottle has increased significantly for all occasions amongst Polish wine drinkers, reflecting trading up as well as inflation-related price increases

Off-trade: Spend on wine by occasion

% who typically spend the following amount on a bottle of wine on each occasion
Base = Those who drink wine on each occasion



/ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

OFF-TRADE VS ON-TRADE

wine intelligence

Gen Z and Millennials present opportunity for the on-trade in Poland once post-Covid normality returns to this channel

Wine purchase in on-trade locations: Tracking

% who buy wine in a bar, pub or restaurant
Base = All Polish semi-annual wine drinkers (n≥1,001)

On-trade location		2015	2018	2021	Tracking	
	n=	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
Bar	Yes	20%	20%	16%	→	↓
	No	80%	80%	84%	→	↑
Restaurant	Yes	54%	63%	58%	→	↓
	No	46%	37%	42%	→	↑

WHAT DO MARKET EXPERTS SAY?

"We are an off-trade country. In the on-trade in general and as a comparison, beer consumption represents about 15% while it is 2% for wine. We mainly buy to consume at home"

Wine Market Researcher, Poland

Wine purchase: on-trade vs off-trade, by age

% who buy wine in a bar, pub or restaurant
Base = All Polish semi-annual wine drinkers (n=1,001)

Wine purchase in the on-trade	All Polish semi-annual wine drinkers	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55+ [Boomers]
n=	*1,001*	*82*	*326*	*245*	*348*
On trade drinker	59%	66%	73%	62%	41%
Not on trade drinker	41%	34%	27%	38%	59%

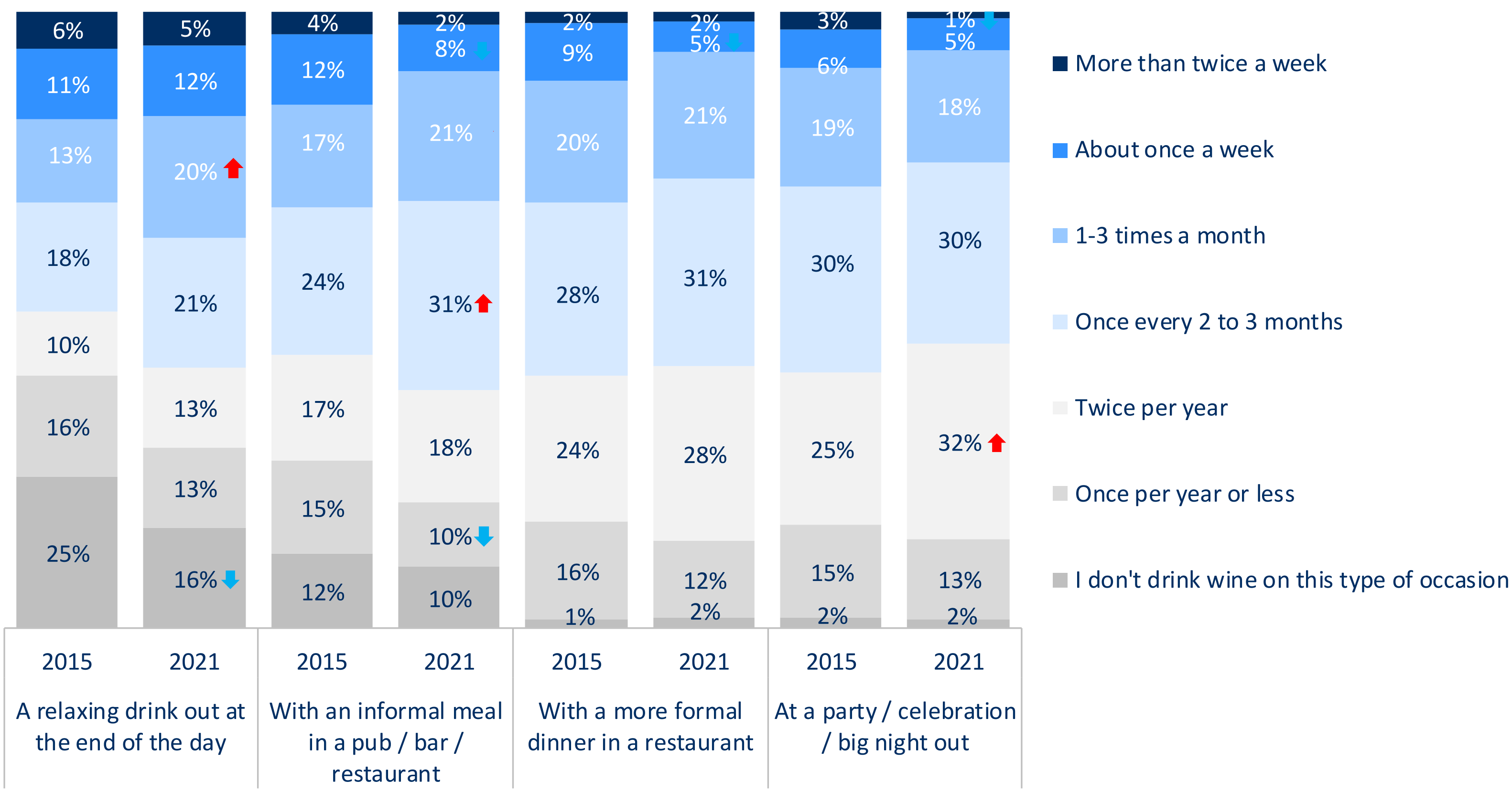
Red / Blue: Statistically significantly higher / lower than all semi-annual wine drinkers at a 95% confidence level
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

ON-TRADE: WINE CONSUMPTION FREQUENCY BY OCCASION

Very few long-term shifts in recalled consumption frequency in on-trade, despite Covid

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in a bar, pub or restaurant



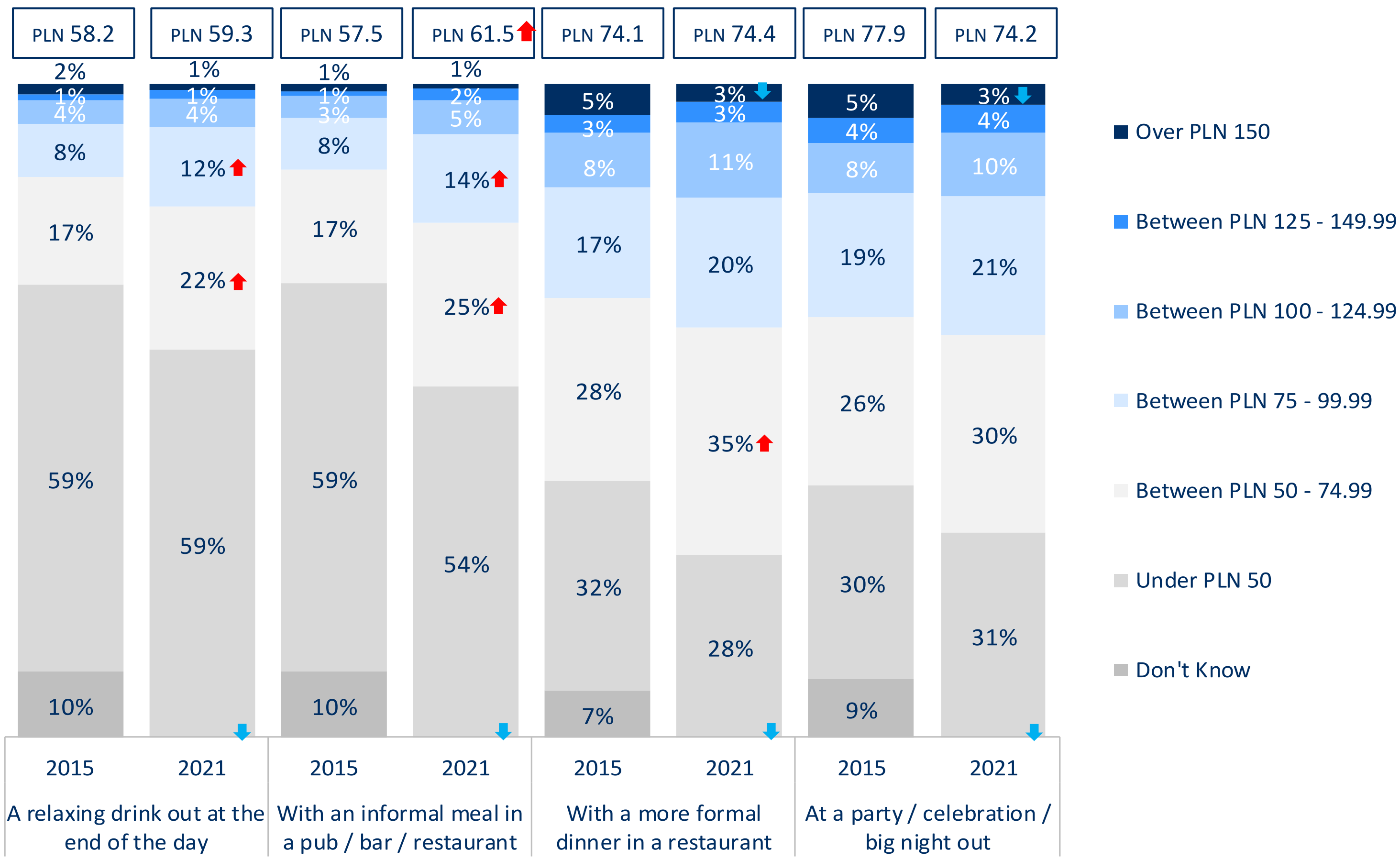
/ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

ON-TRADE: SPEND ON WINE BY OCCASION

Also in line with the off-trade, spending has increased within the on-trade despite stability in consumption frequency (though to a lesser extent)

On-trade: Spend on wine by occasion

% who typically spend the following amount on a bottle of wine on each occasion
Base = Those who drink wine on each occasion



⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) and 2015 (n = 1,008) Polish semi-annual wine drinkers

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POLISH WINE BRAND POWER INDEX

Brand health measures included in the index

wine intelligence

Measure	Definition	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	Brand purchase index
Consideration	% who would consider buying each brand Base = Those who have heard of each brand	Brand purchase index
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	Brand connection index

Brand Power Index

POLISH WINE BRAND POWER INDEX 2021

The top 15 most powerful wine brands in the Polish wine market

wine intelligence

	Brand	Awareness Index	Purchase Index	Connection Index	Final Index
1st	Carlo Rossi	100	100	100	100.0
2nd	Kadarka	95	66	54	72.5
3rd	Old Kadarka Domain Menada	91	56	54	67.8
4th	El Sol	66	63	71	66.6
5th	Fresco	68	61	60	63.1
6th	Sophia	80	52	54	62.7
7th	Jack Rabbit	29	50	73	49.7
8th	Jacob's Creek	36	49	65	49.5
9th	California Hills	46	42	60	48.9
10th	Old Tbilisi	25	48	72	47.4
11th	Moldawska Dolina	35	46	62	47.0
12th	Egri Bikavér	42	41	57	46.3
13th	Casillero del Diablo	37	46	57	46.0
14th	Beauvillon	31	45	64	45.5
15th	Chateau Menada	33	44	61	45.3

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

The top 3 most powerful wine brands in the Polish wine market

1^{st} Carlo Rossi

2^{nd} KADARKA

3^{rd} KADARKA

Resulting from strong distribution, American brand Carlo Rossi is the top performing brand in Poland. It is accessible price-wise but also offers an approachable profile (mild and slightly sweet) that matches Polish wine drinkers' tastes.

Additionally, Eastern Europe is a popular region of origin amongst Polish wine drinkers; this is due to geographic proximity and frequented holiday destinations. Kadarka (brand from Bulgaria but named after the Hungarian grape) is very well-known in Poland and produces full-bodied wines with sweet spices and black fruits; appealing to Polish drinkers.

WHAT DO MARKET EXPERTS SAY?

"Carlo Rossi has been one of the first brands to enter the Polish market. It has a really strong distribution channel; you can find it everywhere. The price is good, and it tastes nice"

Wine Market Researcher, Poland

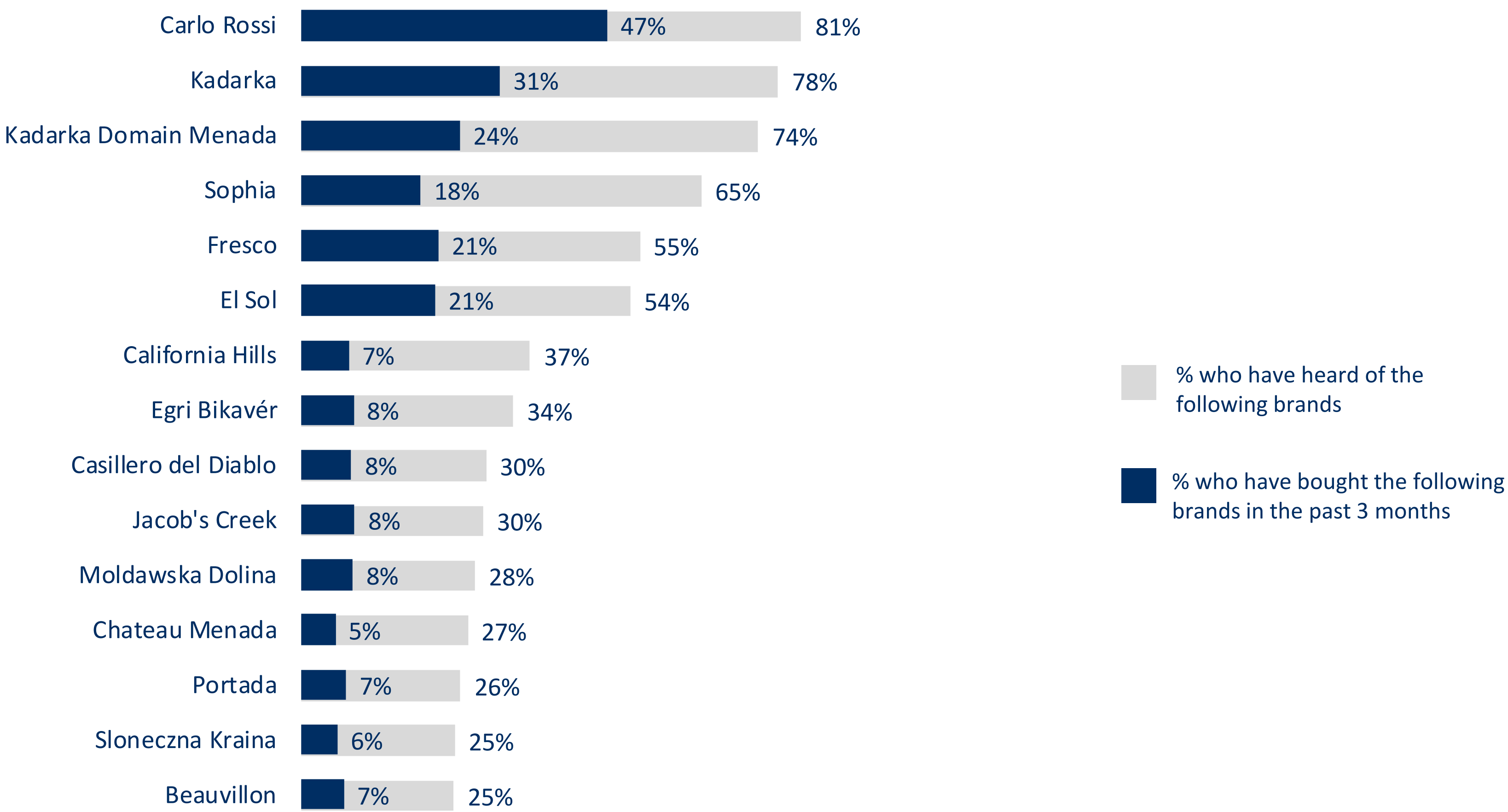
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

BRAND HEALTH: AWARENESS VS. PURCHASE

Carlo Rossi is the most powerful brand in Poland, with the highest levels of awareness and consumption

Top 15 brands by **awareness** and respective **purchase** level

Base = All Polish semi-annual wine drinkers (n=1,001)



Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

BRAND HEALTH: AWARENESS

General stability in terms of awareness within the Polish wine market, as some top brands experience declines and some lesser-known brands have seen increases

Awareness: Tracking

% who have heard of the following brands
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank 2021	Brand	2015	2018	2021	Tracking vs. '15	Tracking vs. '18
	n=	*1,008*	*2,000*	*1,001*		
1	Carlo Rossi	84%	85%	81%	→	↓
2	Kadarka	76%	80%	78%	→	→
3	Old Kadarka Domain Menada	n/a	n/a	74%	n/a	n/a
4	Sophia	73%	68%	65%	↓	→
5	Fresco	54%	51%	55%	→	→
6	El Sol	67%	59%	54%	↓	↓
7	California Hills	n/a	n/a	37%	n/a	n/a
8	Egri Bikavér	n/a	n/a	34%	n/a	n/a
9=	Casillero del Diablo	27%	32%	30%	→	→
9=	Jacob's Creek	30%	30%	30%	→	→
11	Moldawska Dolina	28%	26%	28%	→	→
12	Chateau Menada	n/a	n/a	27%	n/a	n/a
13	Portada	19%	25%	26%	↑	→
14=	Sloneczna Kraina	n/a	n/a	25%	n/a	n/a
14=	Beauvillon	n/a	n/a	25%	n/a	n/a
14=	Isla Negra	21%	24%	25%	↑	→
17	Jack Rabbit	n/a	n/a	24%	n/a	n/a
18=	Frontera	18%	24%	23%	↑	→
18=	Gato Negro	16%	23%	23%	↑	→
20	J.P. Chenet	26%	27%	22%	↓	↓
21	Old Tbilisi	n/a	n/a	21%	n/a	n/a
22	Maison Castel	n/a	n/a	20%	n/a	n/a

Rank 2021	Brand	2015	2018	2021	Tracking vs. '15	Tracking vs. '18
	n=	*1,008*	*2,000*	*1,001*		
23=	Kagor Dionis	19%	19%	19%	→	→
23=	Gallo Family Vineyards	15%	17%	19%	↑	→
25=	Egri Bor	21%	16%	17%	↓	→
25=	Chillan	15%	17%	17%	→	→
27=	Imiglykos	18%	18%	16%	→	→
27=	Don Raffiano	11%	16%	16%	↑	→
29	Bongeronde	18%	17%	15%	→	→
30=	Dark Horse	n/a	n/a	14%	n/a	n/a
30=	Cono Sur	n/a	n/a	14%	n/a	n/a
32=	Mezzek	10%	14%	13%	↑	→
32=	Sutter Home	12%	15%	13%	→	→
32=	Kazayak	10%	14%	13%	↑	→
32=	Barefoot	n/a	11%	13%	n/a	→
36=	Concha y Toro	13%	14%	12%	→	→
36=	Baron de Lestac	11%	13%	12%	→	→
38=	Blossom Hill	9%	12%	11%	→	→
38=	Apothic	n/a	n/a	11%	n/a	n/a
38=	Yellow Tail	n/a	n/a	11%	n/a	n/a
38=	Peter Mertes	8%	10%	11%	↑	→
42	Oak View	9%	11%	10%	→	→
43	Panul	n/a	n/a	8%	n/a	n/a
	None of these	1%	1%	1%	→	→

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

BRAND HEALTH: PURCHASE

In line with declining awareness, purchase has also declined for some top brands

Purchase: Tracking

% who have bought the following brands in the past 3 months
Base = All Polish semi-annual wine drinkers (n≥1,001)

Rank	Brand	2015	2018	2021	Tracking	
2021	*n=*	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
1	Carlo Rossi	47%	58%	47%	→	↓
2	Kadarka	36%	41%	31%	↓	↓
3	Old Kadarka Domain Menada	n/a	n/a	24%	n/a	n/a
4=	Fresco	19%	20%	21%	→	→
4=	El Sol	27%	27%	21%	↓	↓
6	Sophia	20%	20%	18%	→	→
7=	Jacob's Creek	7%	9%	8%	→	→
7=	Egri Bikavér	n/a	n/a	8%	n/a	n/a
7=	Moldawska Dolina	9%	7%	8%	→	→
7=	Casillero del Diablo	8%	8%	8%	→	→
7=	Jack Rabbit	n/a	n/a	8%	n/a	n/a
12=	California Hills	n/a	n/a	7%	n/a	n/a
12=	Portada	5%	6%	7%	↑	→
12=	Beauvillon	n/a	n/a	7%	n/a	n/a
15=	J.P. Chenet	6%	7%	6%	→	→
15=	Old Tbilisi	n/a	n/a	6%	n/a	n/a
15=	Sloneczna Kraina	n/a	n/a	6%	n/a	n/a
18=	Chateau Menada	n/a	n/a	5%	n/a	n/a
18=	Isla Negra	3%	5%	5%	→	→
18=	Gato Negro	4%	5%	5%	→	→
21=	Kagor Dionis	6%	6%	4%	→	→
21=	Frontera	3%	4%	4%	→	→

Rank	Brand	2015	2018	2021	Tracking	
2021	*n=*	*1,008*	*2,000*	*1,001*	vs. '15	vs. '18
21=	Maison Castel	n/a	n/a	4%	n/a	n/a
21=	Imiglykos	4%	5%	4%	→	→
21=	Chillan	3%	4%	4%	→	→
21=	Bongeronde	5%	4%	4%	→	→
27=	Blossom Hill	2%	3%	3%	→	→
27=	Don Raffiano	3%	2%	3%	→	→
27=	Cono Sur	n/a	n/a	3%	n/a	n/a
27=	Sutter Home	4%	4%	3%	→	→
27=	Gallo Family Vineyards	3%	3%	3%	→	→
27=	Mezzek	2%	3%	3%	→	→
27=	Yellow Tail	n/a	n/a	3%	n/a	n/a
34=	Baron de Lestac	2%	3%	2%	→	→
34=	Kazayak	1%	2%	2%	↑	→
34=	Barefoot	n/a	2%	2%	n/a	→
34=	Dark Horse	n/a	n/a	2%	n/a	n/a
34=	Concha y Toro	3%	2%	2%	→	→
34=	Apothic	n/a	n/a	2%	n/a	n/a
34=	Egri Bor	5%	3%	2%	↓	→
34=	Oak View	2%	2%	2%	→	→
42=	Peter Mertes	2%	1%	1%	→	→
42=	Panul	n/a	n/a	1%	n/a	n/a
	None of these	14%	9%	11%	↓	↑

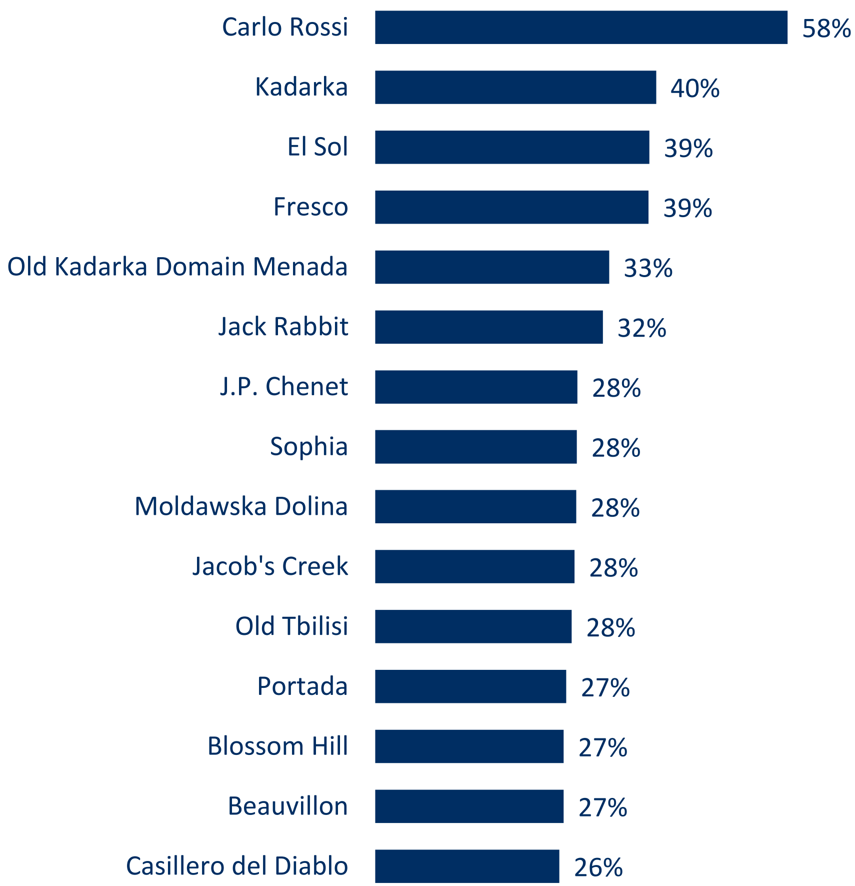
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

BRAND HEALTH: CONVERSION

Conversion incidences are relatively narrow within the Polish market after top brand Carlo Rossi

Conversion: Top 15 brands

% who have bought the following brands in the past 3 months
Base = Those who have heard of each brand



*"Which of these brands **have you bought** in the past 3 months?"*

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

BRAND HEALTH: CONVERSION

Declines in conversion rates for the top 3 brands is in line with awareness and purchase declines; stability throughout the remaining tested brands

Conversion: Tracking

% who have bought the following brands in the past 3 months
Base = Those who have heard of each brand

Rank 2021	Brand	2015	2018	2021	Tracking vs. '15	Tracking vs. '18
1	Carlo Rossi	56%	69%	58%	→	↓
2	Kadarka	48%	51%	40%	↓	↓
3=	El Sol	40%	46%	39%	→	↓
3=	Fresco	35%	39%	39%	→	→
5	Old Kadarka Domain Menada	n/a	n/a	33%	n/a	n/a
6	Jack Rabbit	n/a	n/a	32%	n/a	n/a
7=	J.P. Chenet	24%	27%	28%	→	→
7=	Sophia	28%	29%	28%	→	→
7=	Moldawska Dolina	32%	28%	28%	→	→
7=	Jacob's Creek	23%	30%	28%	→	→
7=	Old Tbilisi	n/a	n/a	28%	n/a	n/a
12=	Portada	24%	25%	27%	→	→
12=	Blossom Hill	22%	21%	27%	→	→
12=	Beauvillon	n/a	n/a	27%	n/a	n/a
15	Casillero del Diablo	29%	25%	26%	→	→
16=	Bongeronde	27%	23%	24%	→	→
16=	Imiglykos	22%	28%	24%	→	→
18=	Egri Bikavér	n/a	n/a	23%	n/a	n/a
18=	Yellow Tail	n/a	n/a	23%	n/a	n/a
18=	Kagor Dionis	32%	30%	23%	↓	→
21=	Sloneczna Kraina	n/a	n/a	22%	n/a	n/a
21=	Chillan	22%	24%	22%	→	→

Rank 2021	Brand	2015	2018	2021	Tracking vs. '15	Tracking vs. '18
23=	Sutter Home	29%	29%	21%	→	→
23=	Gato Negro	26%	22%	21%	→	→
23=	Cono Sur	n/a	n/a	21%	n/a	n/a
23=	Baron de Lestac	23%	26%	21%	→	→
27=	Mezzek	21%	20%	20%	→	→
27=	California Hills	n/a	n/a	20%	n/a	n/a
27=	Isla Negra	17%	21%	20%	→	→
27=	Maison Castel	n/a	n/a	20%	n/a	n/a
27=	Chateau Menada	n/a	n/a	20%	n/a	n/a
32=	Don Raffiano	23%	14%	19%	→	→
32=	Kazayak	6%	16%	19%	↑	→
34=	Barefoot	n/a	21%	18%	n/a	→
34=	Frontera	19%	16%	18%	→	→
34=	Apothic	n/a	n/a	18%	n/a	n/a
37	Concha y Toro	21%	17%	17%	→	→
38=	Oak View	22%	19%	16%	→	→
38=	Dark Horse	n/a	n/a	16%	n/a	n/a
40	Gallo Family Vineyards	21%	19%	15%	→	→
41=	Egri Bor	23%	19%	12%	↓	↓
41=	Panul	n/a	n/a	12%	n/a	n/a
43	Peter Mertes	23%	12%	11%	↓	→
	None of these	14%	9%	11%	↓	↑

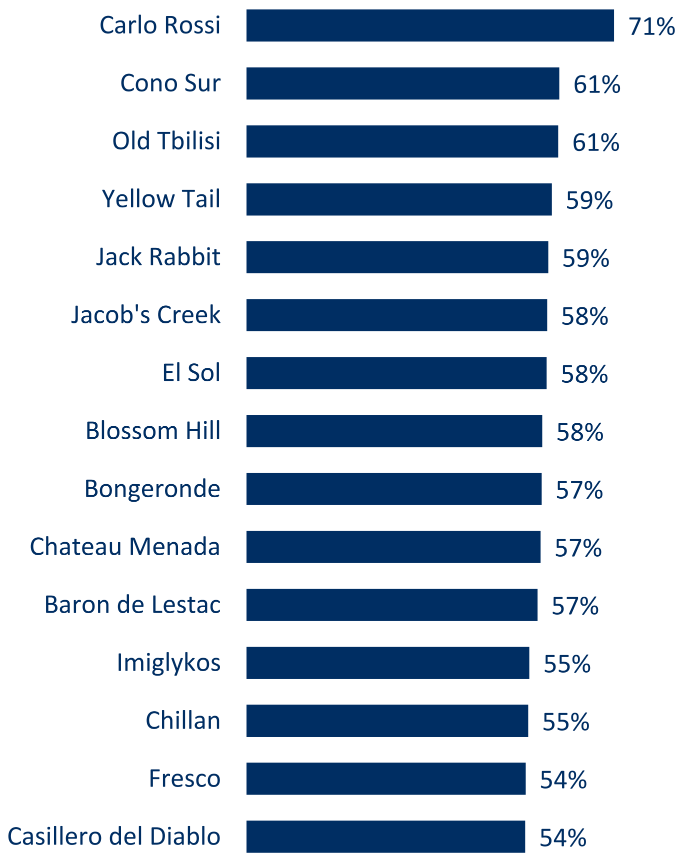
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

BRAND HEALTH: CONSIDERATION

Carlo Rossi tops the brand list in terms of consideration, in line with the other measures

Consideration: Top 15 brands

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



"Which of the following brands would you consider buying?"

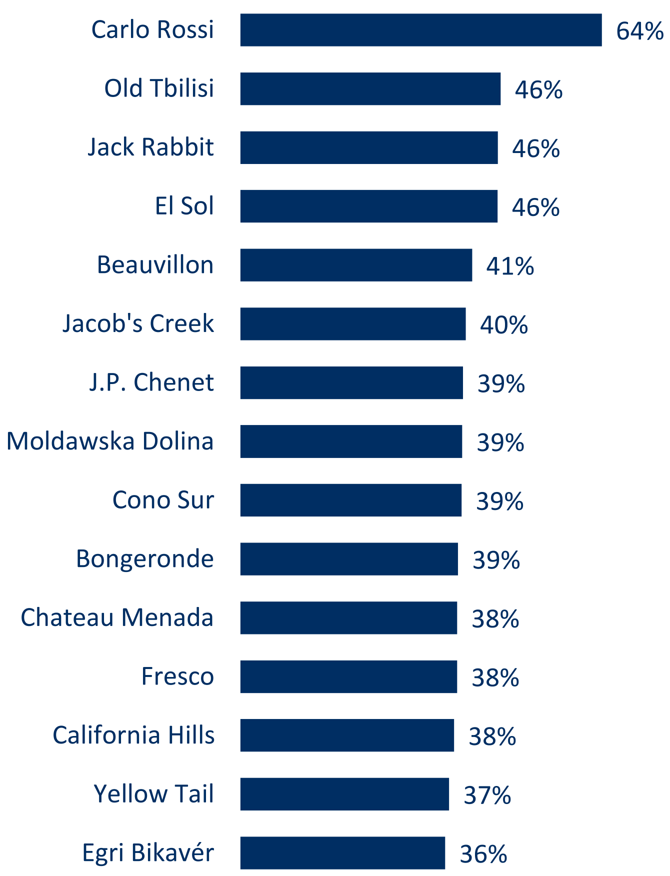
Note: This question was updated in 2021 and therefore tracking is unavailable
Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

BRAND HEALTH: AFFINITY

Affinity incidence is narrow amongst brands after leading Carlo Rossi

Affinity: Top 15 brands

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



"Which of these brands do you think are right for a person like you?"

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

BRAND HEALTH: AFFINITY

Despite stability in other health measures, affinity has increased for a few brands throughout the market

Affinity: Tracking

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

Rank 2021	Brand	2015	2018	2021	Tracking vs. '15	Tracking vs. '18
1	Carlo Rossi	60%	63%	64%	→	→
2=	Old Tbilisi	n/a	n/a	46%	n/a	n/a
2=	Jack Rabbit	n/a	n/a	46%	n/a	n/a
2=	El Sol	42%	39%	46%	→	↑
5	Beauvillon	n/a	n/a	41%	n/a	n/a
6	Jacob's Creek	36%	37%	40%	→	→
7=	J.P. Chenet	26%	32%	39%	↑	↑
7=	Moldawska Dolina	34%	32%	39%	→	→
7=	Cono Sur	n/a	n/a	39%	n/a	n/a
7=	Bongeronde	40%	28%	39%	→	↑
11=	Chateau Menada	n/a	n/a	38%	n/a	n/a
11=	Fresco	32%	29%	38%	↑	↑
11=	California Hills	n/a	n/a	38%	n/a	n/a
14	Yellow Tail	n/a	n/a	37%	n/a	n/a
15=	Egri Bikavér	n/a	n/a	36%	n/a	n/a
15=	Baron de Lestac	28%	33%	36%	→	→
15=	Sophia	30%	26%	36%	↑	↑
15=	Chillan	26%	28%	36%	→	→
19=	Imiglykos	32%	30%	35%	→	→
19=	Sutter Home	38%	30%	35%	→	→
19=	Kadarka	40%	35%	35%	↓	→
19=	Blossom Hill	30%	28%	35%	→	→
23=	Gato Negro	32%	26%	34%	→	↑
23=	Old Kadarka Domain Menada	n/a	n/a	34%	n/a	n/a
23=	Don Raffiano	17%	21%	34%	↑	↑
26=	Panul	n/a	n/a	33%	n/a	n/a
26=	Portada	30%	28%	33%	→	→
26=	Maison Castel	n/a	n/a	33%	n/a	n/a
26=	Casillero del Diablo	31%	30%	33%	→	→
26=	Kazayak	19%	19%	33%	↑	↑
26=	Dark Horse	n/a	n/a	33%	n/a	n/a
32=	Oak View	34%	28%	32%	→	→
32=	Sloneczna Kraina	n/a	n/a	32%	n/a	n/a
34=	Isla Negra	29%	26%	29%	→	→
34=	Kagor Dionis	36%	24%	29%	→	→
34=	Apothic	n/a	n/a	29%	n/a	n/a
37=	Mezzek	30%	23%	28%	→	→
37=	Frontera	22%	22%	28%	→	→
39	Concha y Toro	25%	25%	27%	→	→
40	Peter Mertes	31%	21%	26%	→	→
41	Barefoot	n/a	22%	25%	n/a	→
42	Gallo Family Vineyards	25%	20%	24%	→	→
43	Egri Bor	36%	26%	22%	↓	→
	None of these	9%	5%	4%	↓	→

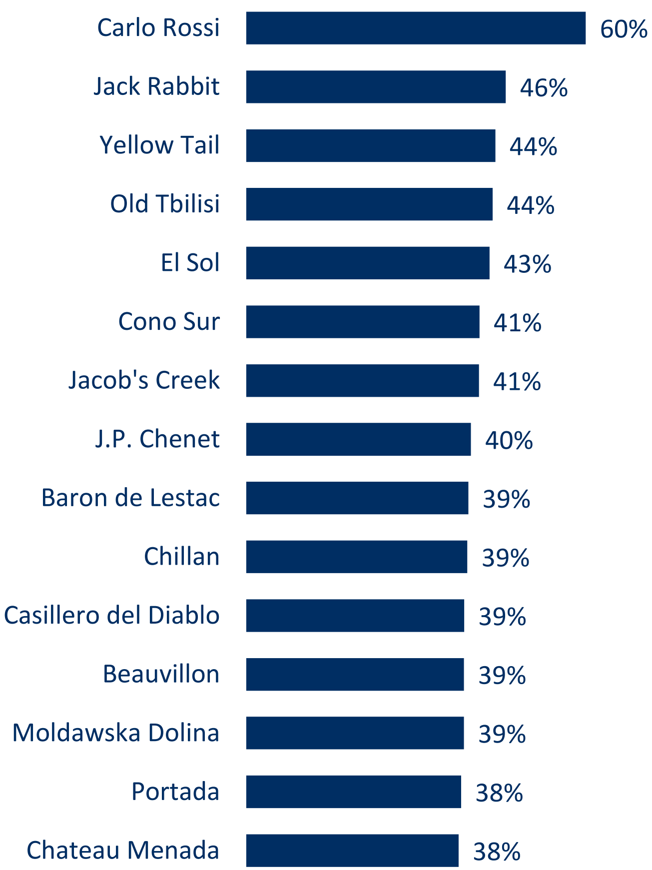
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

BRAND HEALTH: RECOMMENDATION

In line with all other metrics, Carlo Rossi tops the brand list in terms of recommendation incidence

Recommendation: Top 15 brands

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



"Which of these brands would you recommend to a friend?"

Source: Wine Intelligence, Vinitrac® Poland, June 2021 (n=1,001) Polish semi-annual wine drinkers

BRAND HEALTH: RECOMMENDATION

In line with affinity, significant increases in terms of recommendation for many brands despite few shifts in other metrics

Recommendation: Tracking

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

Rank 2021	Brand	2015	2018	2021	Tracking vs. '15	Tracking vs. '18
1	Carlo Rossi	60%	63%	60%	→	→
2	Jack Rabbit	n/a	n/a	46%	n/a	n/a
3=	Yellow Tail	n/a	n/a	44%	n/a	n/a
3=	Old Tbilisi	n/a	n/a	44%	n/a	n/a
5	El Sol	42%	39%	43%	→	→
6=	Cono Sur	n/a	n/a	41%	n/a	n/a
6=	Jacob's Creek	36%	38%	41%	→	→
8	J.P. Chenet	29%	31%	40%	↑	↑
9=	Baron de Lestac	22%	34%	39%	↑	→
9=	Chillan	29%	29%	39%	↑	↑
9=	Casillero del Diablo	36%	30%	39%	→	↑
9=	Beauvillon	n/a	n/a	39%	n/a	n/a
9=	Moldawska Dolina	33%	30%	39%	→	↑
14=	Portada	28%	28%	38%	↑	↑
14=	Chateau Menada	n/a	n/a	38%	n/a	n/a
16=	Oak View	26%	23%	37%	→	↑
16=	California Hills	n/a	n/a	37%	n/a	n/a
18=	Fresco	26%	30%	36%	↑	↑
18=	Concha y Toro	26%	24%	36%	→	↑
20=	Blossom Hill	26%	32%	35%	→	→
20=	Imiglykos	30%	30%	35%	→	→
22=	Egri Bikavér	n/a	n/a	34%	n/a	n/a
22=	Maison Castel	n/a	n/a	34%	n/a	n/a
22=	Apothic	n/a	n/a	34%	n/a	n/a
25=	Bongeronde	34%	30%	33%	→	→
25=	Sloneczna Kraina	n/a	n/a	32%	n/a	n/a
25=	Old Kadarka Domain Menada	n/a	n/a	32%	n/a	n/a
25=	Kadarka	37%	34%	32%	↓	→
25=	Gato Negro	30%	26%	32%	→	→
30=	Sophia	23%	23%	31%	↑	↑
30=	Dark Horse	n/a	n/a	31%	n/a	n/a
32=	Sutter Home	33%	27%	30%	→	→
32=	Kazayak	20%	21%	30%	→	→
34=	Kagor Dionis	33%	25%	29%	→	→
34=	Barefoot	n/a	23%	29%	n/a	→
34=	Don Raffiano	18%	24%	29%	↑	→
34=	Isla Negra	22%	25%	29%	→	→
38=	Frontera	20%	19%	28%	↑	↑
38=	Panul	n/a	n/a	28%	n/a	n/a
38=	Gallo Family Vineyards	28%	22%	28%	→	→
41	Mezzek	21%	23%	27%	→	→
42	Peter Mertes	30%	29%	26%	→	→
43	Egri Bor	29%	22%	21%	→	→
	None of these	7%	5%	3%	↓	↓

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Poland, March 2015, March + July 2018 and June 2021 (n≥1,001) Polish semi-annual wine drinkers

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RESEARCH METHODOLOGY: QUANTITATIVE

- The data was collected in Poland since March 2015
- The following waves March 2015, August 2018, July 2018 and January 2020 were tracked against June 2021
- 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 Polish semi-annual wine drinkers in terms of age and gender
- The distribution of the sample is shown in the table:

			Mar-15	*Aug-18 + Jul-18*	*Jan-20*	*Jun-21*
		n=	*1,003*	*2,000*	*1,000*	*1,001*
Gender	Male		43%	42%	46%	46%
	Female		57%	58%	54%	54%
	Total		*100%*	*100%*	*100%*	*100%*
Age	18-24		17%	14%	8%	8%
	25-34		25%	25%	21%	21%
	35-44		19%	19%	20%	20%
	45-54		18%	18%	16%	16%
	55-64		15%	15%	16%	16%
	65 and over		6%	10%	18%	18%
	Total		*100%*	*100%*	*100%*	*100%*

Source: Wine Intelligence, Vinitrac® Poland, March 2015 - June 2021 (n ≥ 1,000) Polish semi-annual wine drinkers

RESEARCH METHODOLOGY: QUALITITATIVE

TRADE INTERVIEWEES

Trade Interviews were conducted with five experienced industry professionals in the Finland wine trade in 2021

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The four interviewees were members of the wine trade working in different roles:

1 x Wine Market Researcher

1 x Sommelier Association President

1 x Wine PR Agency Director

1 x Wine Writer

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2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

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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.

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