wine intelligence

A division of the IWSR Group

# Norway

## Wine Landscapes 2022

# Contents

# Wine Intelligence Viewpoint

## Despite a shrinking, relatively conservative wine drinking population, there are opportunities in sparkling wine, premiumisation and COVID-driven boom in domestic purchase

The proportion of Norwegian adults who are regular wine drinkers has fallen since 2017, but those who remain in the category are more frequent drinkers.

Norwegian regular wine drinker's demographics have skewed towards older and richer consumers. Attracting younger consumers to the category is the key challenge.

Despite this shrinking population, there has been a notable boost in volumes sold domestically. However, this is partly driven by the shutdown of cross-border commerce during the COVID-19 pandemic. Norwegians who previously looked for bargains in Sweden or duty-free were instead purchasing at home. Although international purchases have not yet returned to pre-pandemic levels, any recovery here could impact domestic sales going forward.

There is evidence of premiumisation in the off-trade market, with average spend increasing along with sales volumes of more expensive wines. This trend is less present on-trade, suggesting it is driven by trading up during the pandemic.

This premiumisation has been accompanied by a growing interest in looking for the best wines people can get for their budget. Functional attributes of wines, such as varietal and alcohol content, also increasingly drive choice, alongside branding.

Overall, Norwegians feel relatively positive about their economic situation for the time being. However, this has not translated into them reporting buying more wine or more expensive wine. Any future economic shocks could dent this confidence and impact consumer spend on the category.

### Opportunities

- Premiumisation
- Increased domestic volumes
- Greater engagement with branding

### Threats

- Aging wine drinking population
- Falling number of regular wine drinkers
- Potential return to purchasing abroad
- Economic turmoil reducing demand

# Management Summary

## Norway Wine Landscapes

2022

# Management Summary

## Key takeaways

### 1. The number of RWDs has fallen

Since 2017, the regular and weekly wine drinking population has decreased notably. Despite this, the proportion of regular wine drinkers who consume the beverage on a weekly basis has remained relatively stable.

### 2. Wine drinkers tend to be older and richer

Boomers account for almost half of all regular wine drinkers, a significant increase on 2021. The proportion from higher income groups has grown, suggesting the decline in the wine drinking population is from younger, lower income consumers dropping out of the category.

### 3. Growth across all alcoholic drinks has been driven by the pandemic

Between 2016 and 2021, there was significant volume growth in most alcohol categories in Norway. This can be explained by the COVID-19 pandemic, with consumers unable to easily cross to Sweden or elsewhere to buy cheaper alcohol. This growth is expected to reverse between 2021 and 2026, in part driven by a return to cross-border trade, and a smaller base of drinkers.

### 4. Decrease in international wine-buying channels

Purchasing from abroad, a significant channel in the Norwegian market, has declined from pre-pandemic levels and is yet to record a significant recovery; as previously shown, this has had an impact on domestic purchasing behaviours in the market. Whether cross-border commerce returns to pre-pandemic levels will likely become apparent in coming years.

# Management Summary

## Key takeaways

### 5. Typical off-trade spend is up

In the off-trade, the typical spend by Norwegian regular wine drinkers has increased significantly. At the same time, consumption frequency has remained relatively stable, showing a premiumization shift. A main factor was the pandemic, with regular wine drinkers shifting spend to at-home consumption, and willing to spend more as they become more affluent.

### 6. Wine drinkers look for the best within their budget

The proportion who look for the best quality wines for their budget has increased, suggesting regular wine drinkers are more engaged with the category and see the value in seeking out better quality products, even if they are more expensive.

### 7. Importance of wine branding has increased

While complementing food has remains the top choice cue, there have been increases in importance for descriptions in-store or on labels, bottle design and brand awareness. Alcohol content and grape variety have also become more important, suggesting wine drinkers are thinking more deeply about the fundamental attributes of their wines.

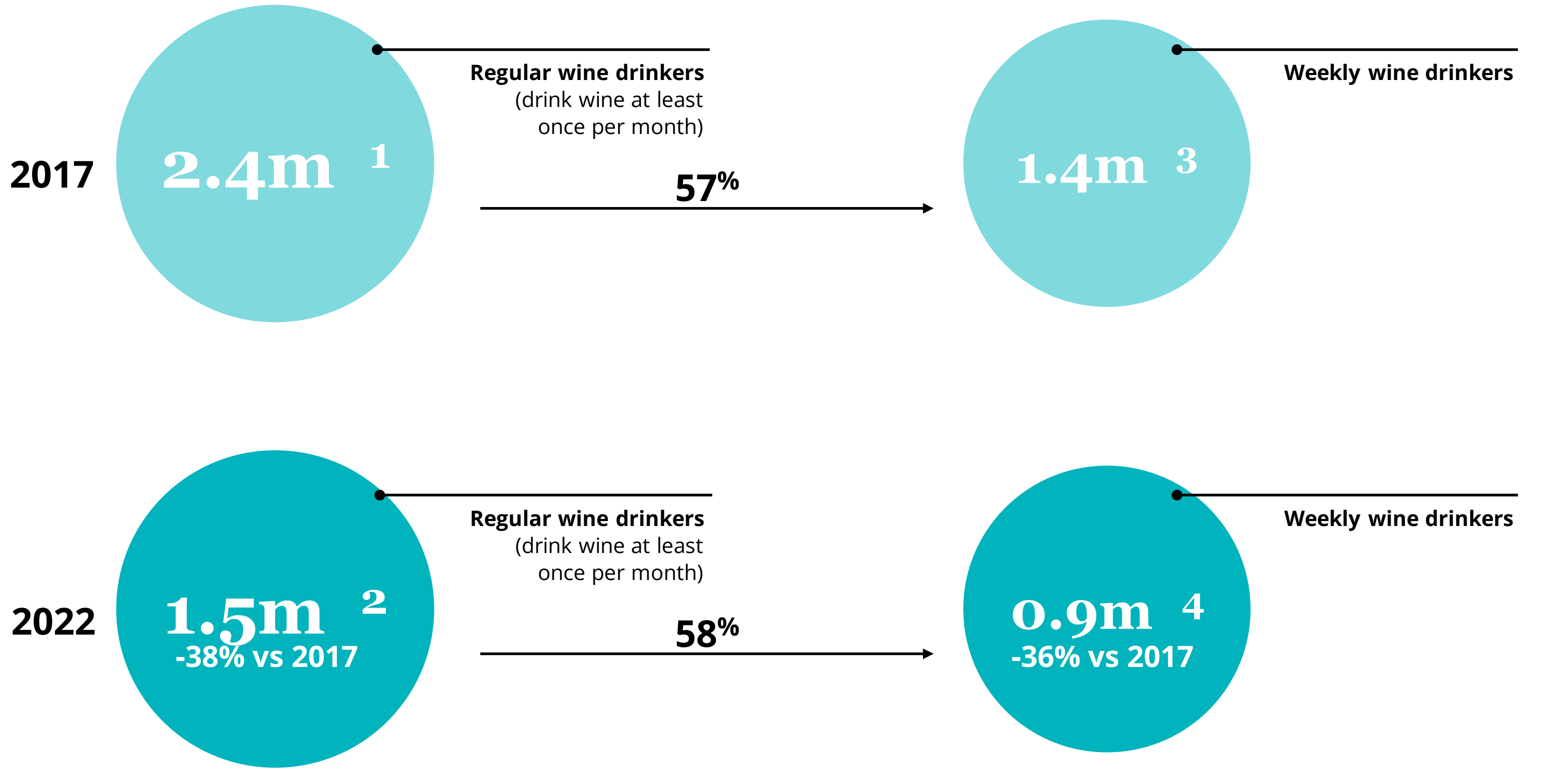
### 8. Norwegians feel positive, but the majority are spending less

Despite mixed feelings on future wealth, Norwegians feel confident they can manage their finances and are generally happy with life. However, this has not translated into consumers going our more, or higher wine consumption and spend, with a net negative number saying they are buying less and cheaper wine.

# 1. The number of regular wine drinkers has fallen

Since 2017, the regular and weekly wine drinking population has decreased notably. Despite this, the proportion of regular wine drinkers who consume the beverage on a weekly basis has remained relatively stable

## Evolution of regular wine drinker population



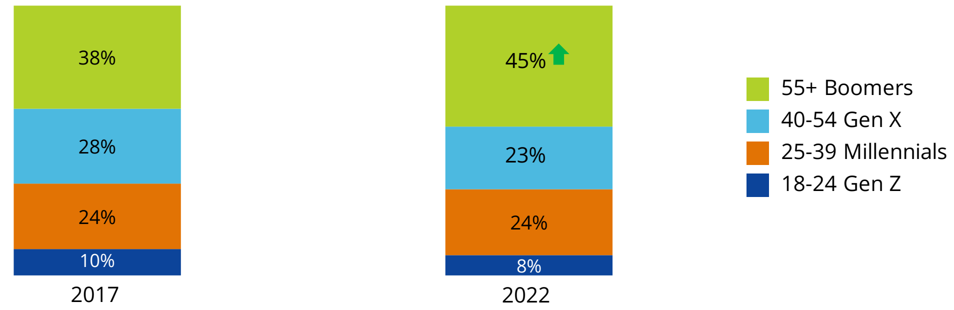

1 Wine Intelligence online calibration study with YouGov, February 2015, (n = 1,005) Norwegian adults. Wine=still light wine (red, white, rosé)
2 Wine Intelligence online calibration study with YouGov, rolling average of February 2019 and February 2021, (n ≥ 1,006) Norwegian adults. Wine=still light wine (red, white, rosé)
3 Wine Intelligence, Vinitrac® Norway, May 2017 (n=506) Norwegian regular wine drinkers
4 Wine Intelligence, Vinitrac® Norway, July 2022 (n=504) Norwegian regular wine drinkers

# 2. Wine drinkers tend to be older and richer

Boomers account for almost half of all regular wine drinkers, a significant increase on 2021. The proportion from higher income groups has grown, suggesting the decline in the wine drinking population is from younger, lower income consumers dropping out of the category

## Generation cohorts within regular wine drinkers

Base = All Norwegian regular wine drinkers (n≥504)




## Total household income of regular wine drinkers

Base = All Norwegian regular wine drinkers (n≥504)

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Less than 259.999 kroner | **10%** | **6%** | ⬇ |
| 260.000 - 449.999 kroner | **19%** | **16%** | ➡ |
| 450.000 - 649.999 kroner | **16%** | **18%** | ➡ |
| 650.000 - 999.999 kroner | **25%** | **26%** | ➡ |
| Above 1.000.000 kroner | **15%** | **21%** | ⬆ |

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

Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

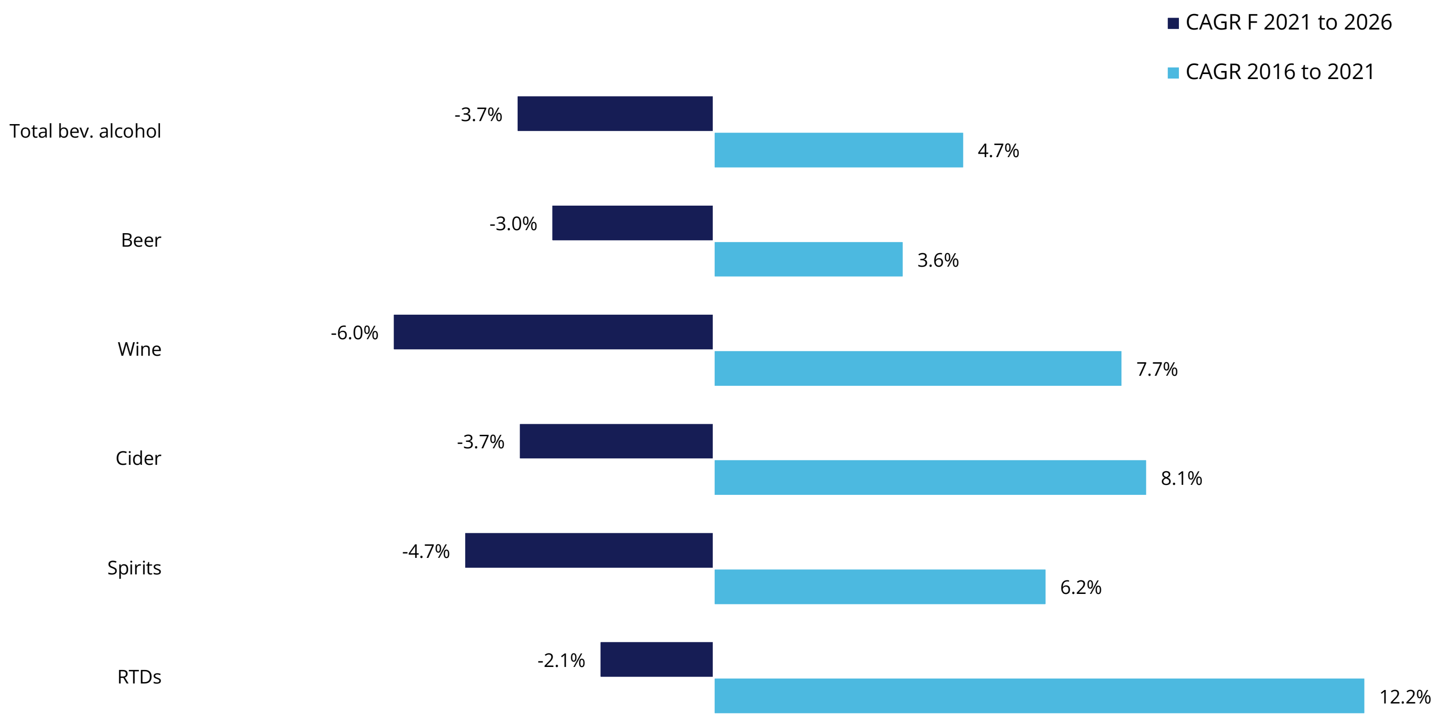
# 3. Growth across all alcoholic drinks has been driven by the pandemic

Between 2016 and 2021, there was significant volume growth in most alcohol categories in Norway. This can be explained by the COVID-19 pandemic, with consumers unable to easily cross to Sweden or elsewhere to buy cheaper alcohol

This growth is expected to reverse between 2021 and 2026, in part driven by a return to cross-border trade, and a smaller base of drinkers

## Historic and forecast volume growth by category: All alcohol

Five-year CAGR %




Source: IWSR

# 4. Decrease in international wine-buying channels

Purchasing from abroad, a significant channel in the Norwegian market, has declined from pre-pandemic levels and is yet to record a significant recovery; as previously shown, this has had an impact on domestic purchasing behaviours in the market

Whether cross-border commerce returns to pre-pandemic levels will likely become apparent in coming years

## Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | From Vinmonopolet | 84% | 82% | 85% | → | → |
| 2 | From Sweden / Systembolaget | 33% | 39% | 33% | → | ↓ |
| 3 | From duty free / at the airport | n/a | n/a | 31% | n/a | n/a |
| 4 | From an overseas retailer | 22% | 27% | 19% | → | ↓ |
| 5 | From a winery during a visit | n/a | n/a | 4% | n/a | n/a |
| 6= | From Finland / Alko | 2% | 3% | 2% | → | → |
| 6= | From a delivery app | n/a | n/a | 2% | n/a | n/a |
| | Other | 3% | 2% | 3% | → | → |

Q: What do market experts say?

"As people weren't able to cross over to Sweden, they were buying domestically"

*Market analyst, Norway*

n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

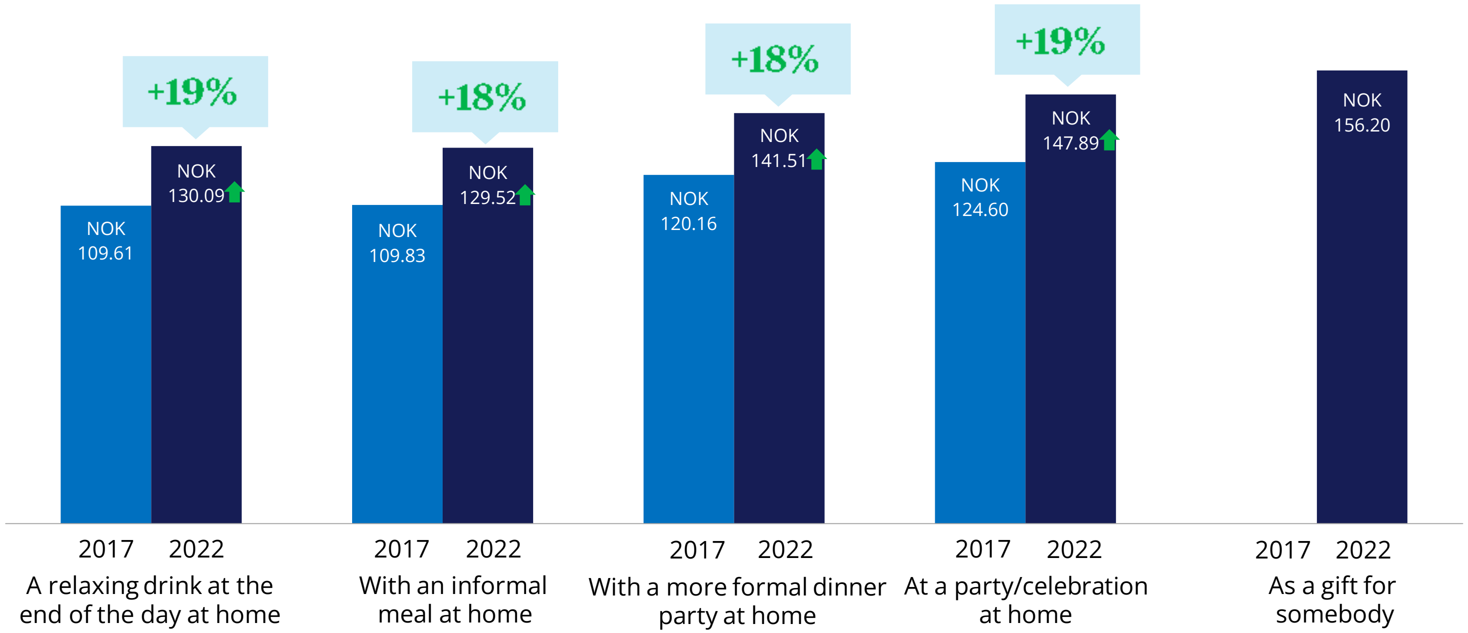
# 5. Typical off-trade spend is up

In the off-trade, the typical spend by Norwegian regular wine drinkers has increased significantly. At the same time, consumption frequency has remained relatively stable, showing a premiumization shift

A main factor was the pandemic, with regular wine drinkers shifting spend to at-home consumption, and willing to spend more as they become more affluent

## Typical spend per occasion in the off-trade

Base = Those who buy wine in the off-trade




Q: What do market experts say?

"It has to do with COVID: people are spending less money on other things and are drinking more at home."

*Wine Journalist, Norway*

As a gift for somebody has no tracking

↑/↓: Statistically significantly higher / lower than May '17 at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# 6. Wine drinkers look for the best within their budget

The proportion who look for the best quality wines for their budget has increased, suggesting regular wine drinkers are more engaged with the category and see the value in seeking out better quality products, even if they are more expensive

## Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Norwegian regular wine drinkers (n≥504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Drinking wine gives me pleasure | 67% | 64% | 65% | → | → |
| 2= | Generally speaking, wine is an expensive drink | 42% | 49% | 51% | ↑ | → |
| 2= | I like to take my time when I purchase a bottle of wine | 49% | 48% | 51% | → | → |
| 4= | I always look for the best quality wines I can get for my budget | 51% | 45% | 50% | → | ↑ |
| 4= | Deciding which wine to buy is an important decision | 48% | 47% | 50% | → | → |
| 6 | I don't understand much about wine | 33% | 30% | 36% | → | ↑ |
| 7= | I have a strong interest in wine | 34% | 33% | 34% | → | → |
| 7= | Wine is important to me in my lifestyle | 32% | 34% | 34% | → | → |
| 7= | Compared to others, I know less about the subject of wine | 37% | 32% | 34% | → | → |
| 10 | Generally speaking, wine is reasonably priced | 29% | 26% | 29% | → | → |
| 11 | I feel competent about my knowledge of wine | 16% | 22% | 23% | ↑ | → |

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# 7. Importance of wine branding has increased

While complementing food has remains the top choice cue, there have been increases in importance for descriptions in-store or on labels, bottle design and brand awareness. Alcohol content and grape variety have also become more important, suggesting wine drinkers are thinking more deeply about the fundamental attributes of their wines

## Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Norwegian regular wine drinkers (n≥504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Wine that matches or complements food | 75% | 76% | 76% | ➡ | ➡ |
| 2 | Taste or wine style descriptions displayed on the shelves or on wine labels | 65% | 60% | 68% | ➡ | ⬆ |
| 3 | A brand I am aware of | 60% | 65% | 66% | ⬆ | ➡ |
| 4 | Recommendation by friend or family | 58% | 61% | 61% | ➡ | ➡ |
| 5 | Recommendations from shop staff or shop leaflets | 60% | 59% | 57% | ➡ | ➡ |
| 6 | The country of origin | 48% | 47% | 52% | ➡ | ➡ |
| 7 | Grape variety | 42% | 48% | 50% | ⬆ | ➡ |
| 8 | The region of origin | 35% | 37% | 38% | ➡ | ➡ |
| 9 | Alcohol content | 24% | 27% | 34% | ⬆ | ⬆ |
| 10 | Recommendation by wine critic or writer | 27% | 29% | 31% | ➡ | ➡ |
| 11 | Appeal of the bottle and / or label design | 19% | 16% | 21% | ➡ | ⬆ |
| 12 | Recommendation by wine guide books | 20% | 20% | 16% | ➡ | ➡ |
| 13 | Whether or not the wine has won a medal or award | 12% | 12% | 13% | ➡ | ➡ |

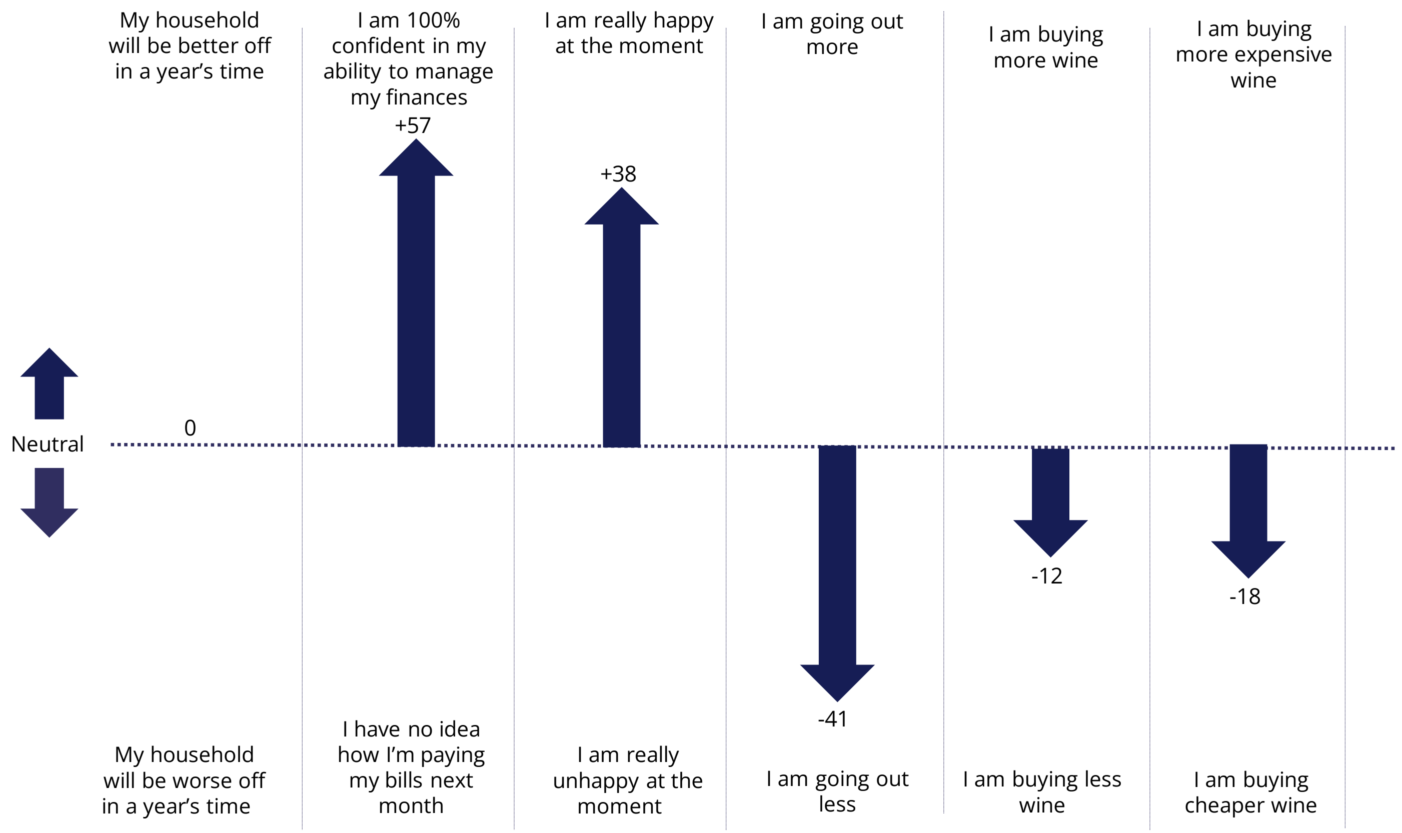
➡ = Represents equal ranking
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# 8. Norwegians feel positive, but the majority are spending less

Despite mixed feelings on future wealth, Norwegians feel confident they can manage their finances and are generally happy with life. However, this has not translated into consumers going our more, or higher wine consumption and spend, with a net negative number saying they are buying less and cheaper wine

## Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Norwegian regular wine drinkers (n=504)




Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Management summary – tracking metrics

Consumption of red wine, beer and Prosecco have grown since 2017, while wines from the top countries and regions of origin have remained stable

## Top alcoholic beverages

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

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Red wine | 86% | 91% | ↑ |
| White wine | 85% | 86% | → |
| Beer | 72% | 82% | ↑ |
| Prosecco | 43% | 52% | ↑ |
| Rosé wine | 44% | 47% | → |

## Top country of origin

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

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Italy | 56% | 56% | → |
| Spain | 56% | 54% | → |
| France | 53% | 49% | → |
| Germany | 33% | 37% | → |
| Chile | 33% | 28% | → |

## Top region of origin

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

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Rioja | 29% | 28% | → |
| Prosecco | 21% | 24% | → |
| Bordeaux | 23% | 20% | → |
| Tuscany | 18% | 20% | → |
| Chablis | 17% | 17% | → |

## Top wine brands

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

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Casillero del Diablo | 23% | 20% | → |
| Tommasi | n/a | 18% | n/a |
| Gato Negro | 18% | 15% | → |
| Falling Feather | n/a | 13% | n/a |
| Lindeman's | 12% | 12% | → |

n/a = tracking unavailable for this wave

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

Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# Management summary – tracking metrics

## Most metrics have remained stable since 2017

### Top red varietals

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

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Cabernet Sauvignon | **50%** | **48%** | → |
| Merlot | **44%** | **43%** | → |
| Pinot Noir | **34%** | **39%** | → |
| Shiraz / Syrah | **33%** | **33%** | → |
| Tempranillo | **17%** | **19%** | → |

### Top white varietals

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

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Riesling | **53%** | **51%** | → |
| Chardonnay | **47%** | **47%** | → |
| Sauvignon Blanc | **35%** | **36%** | → |
| Pinot Grigio / Pinot Gris | **21%** | **18%** | → |
| Moscato | **14%** | **13%** | → |

### Top wine-buying channels

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

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| From Vinmonopolet | **84%** | **85%** | → |
| From Sweden / Systembolaget | **33%** | **33%** | → |
| From duty free / at the airport | **n/a** | **31%** | n/a |
| From an overseas retailer | **22%** | **19%** | → |
| From a winery during a visit | **n/a** | **4%** | n/a |

### Top wine-buying choice cues

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

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Wine that matches or complements food | **75%** | **76%** | → |
| Taste or wine style descriptions displayed on shelves / labels | **65%** | **68%** | → |
| A brand I am aware of | **60%** | **66%** | ↑ |
| Recommendation by friend or family | **58%** | **61%** | → |
| Recommendations from shop staff or shop leaflets | **60%** | **57%** | → |

n/a = tracking unavailable for this wave

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

Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# Market Data

## Norway Wine Landscapes

2022

# Market Data

## Key takeaways

### 1. Wine makes up a fifth of total alcohol volumes

Wine accounts for 21% of the total volume of alcohol in the Norwegian market, making it the second-largest segment, behind beer on 70%.

### 2. Growth in premium-priced wine since 2016

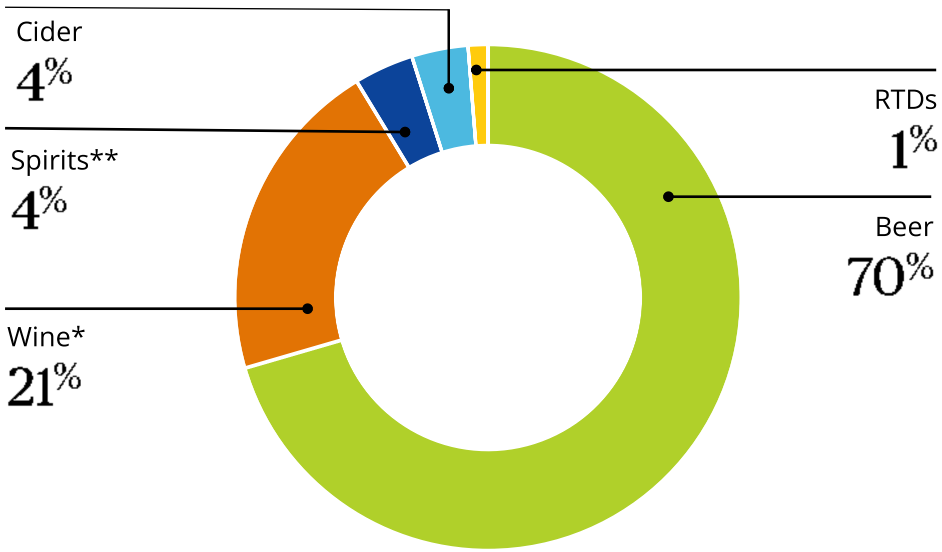
Since 2016, there has been exponential growth in most price bands of both still and sparkling wines. This growth is expected to slow in the next five years.

# Total beverage alcohol market share by category

Beer dominates the Norwegian market, with nearly three-quarters of total beverage alcohol volume; wine is in second place, making up just over a fifth of the market

## 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

| | 2020 | 2021 |
|---|---|---|
| Beer | 33,915.00 | 36,737.78 |
| Wine | 10,704.14 | 10,852.88 |
| Cider | 1,788.89 | 1,987.78 |
| Spirits | 1,751.67 | 1,878.85 |
| RTDs | 599.84 | 657.22 |

Source: IWSR

* Wine includes 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 flavored spirits

# Alcohol market change

## All beverage categories have seen an increase in volumes due to pandemic restrictions, with Norwegians unable to cross borders to buy alcohol in neighbouring countries. This effect is expected to fade and wine volumes are expected to decline over the next five years

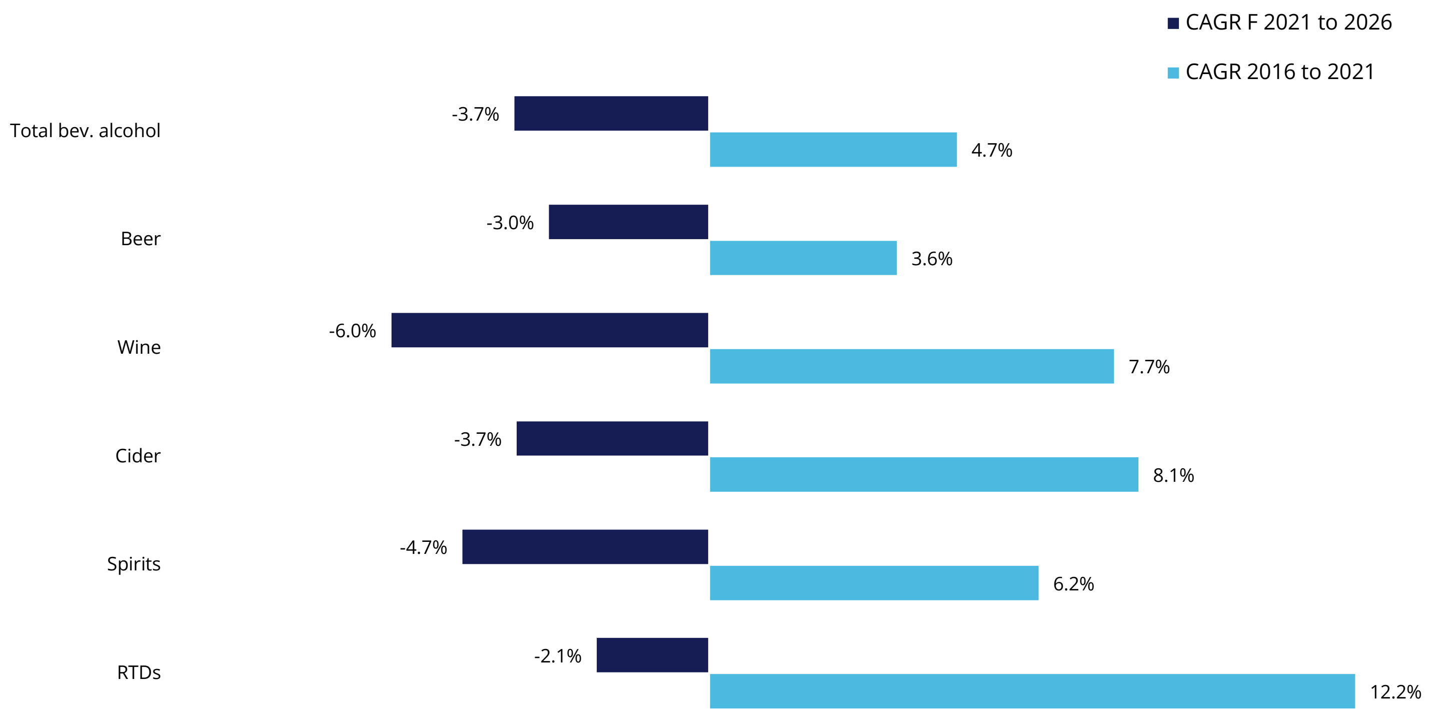
### Q: What do market experts say?

"As fuel prices increase, people who would be traveling into Sweden are finding it might not be so economical anymore. Because fuel prices are higher, their shop is now going to be more expensive."

*Market analyst, Norway*

### Historic and forecast volume growth by category

Five-year CAGR %




Source: IWSR

* Wine includes still wine, sparkling wine, fortified wine and light aperitifs

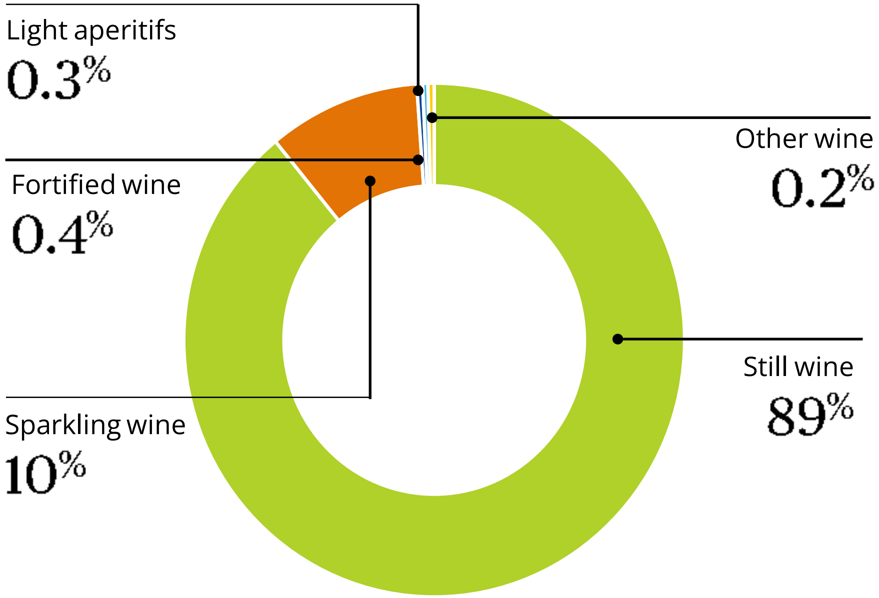
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

# Total wine market volumes

## Volumes in all wine sub-categories remained fairly stable from 2020 to 2021; still wine is the market leading wine category, making up the vast majority, with sparkling wine coming in second with only 10% share

### Total wine share by category

% of purchases that fall within the categories below




### Total wine volumes by category

000s 9-litre cases

| | 2020 | 2021 |
|---|---|---|
| **Still Wine** | **9,660.44** | **9,689.58** |
| **Sparkling Wine** | **949.70** | **1,067.65** |
| **Fortified Wine** | **40.35** | **40.90** |
| **Light Aperitifs** | **36.20** | **37.35** |
| **Other Wines** | **17.45** | **17.40** |

Source: IWSR

# Wine market change

## All types of wine saw growth between 2016 and 2021, due to Norwegians being unable to travel to neighbouring countries to buy wines at lower tax rates. Sparkling wine was the standout performer. Volumes of all categories are expected to decline in the next five years

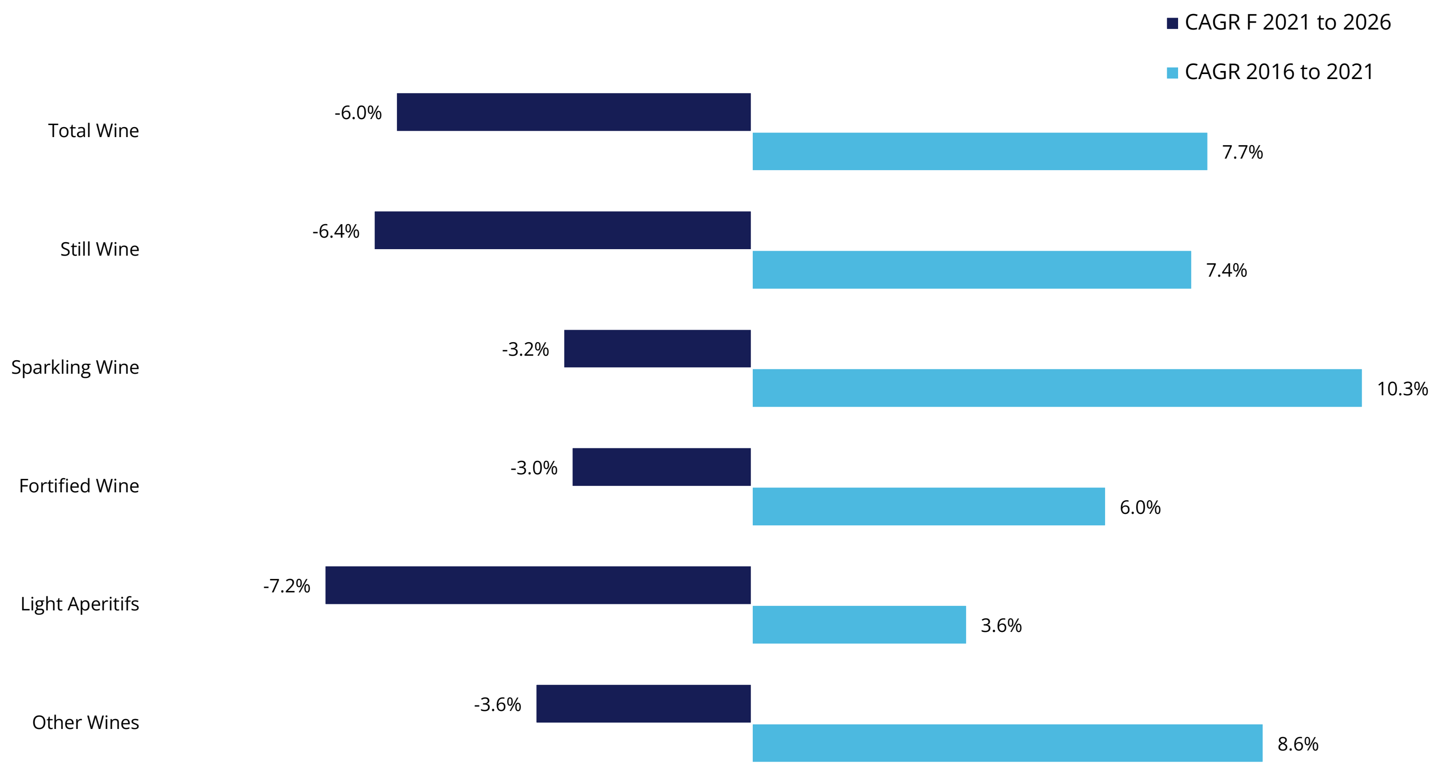
Q: What do market experts say?

"People are buying smaller volumes of wines, but better quality. I would say you have a mixture of potentially some people moving away from wine in general. Within wine, you've got a focus on value over volume. So I think those two things in conjunction will be impacting that long-term declining curve."

*Market analyst, Norway*

### Historic and forecast volume growth by category

Five-year CAGR %




Source: IWSR

# Still wine volumes by origin

## Italy and France make up just under half of the wine market; market leader Italy saw a decrease in volumes from 2020 to 2021, while France's volumes increased marginally

### Total still wine volumes and market share by origin

000s 9-litre cases

| | | 2020 | 2021 | Market Share |
|---|---|---|---|---|
| | **Total** | **9,660.00** | **9,204.39** | |
| 1 | **Italian** | **2,679.69** | **2,556.25** | **28%** |
| 2 | **French** | **1,886.88** | **1,945.02** | **21%** |
| 3 | **German** | **902.45** | **930.55** | **10%** |
| 4 | **Spanish** | **937.94** | **895.95** | **10%** |
| 5 | **Chilean** | **843.00** | **783.77** | **9%** |
| 6 | **US** | **630.60** | **654.88** | **7%** |
| 7 | **Australian** | **533.70** | **586.28** | **6%** |
| 8 | **Portuguese** | **509.10** | **518.33** | **6%** |
| 9 | **South African** | **167.48** | **173.05** | **2%** |
| 10 | **Argentinian** | **156.50** | **160.31** | **2%** |

Q: What do market experts say?

"Italy has quite a lot of dominance over the wine market."

*Market analyst, Norway*

Source: IWSR

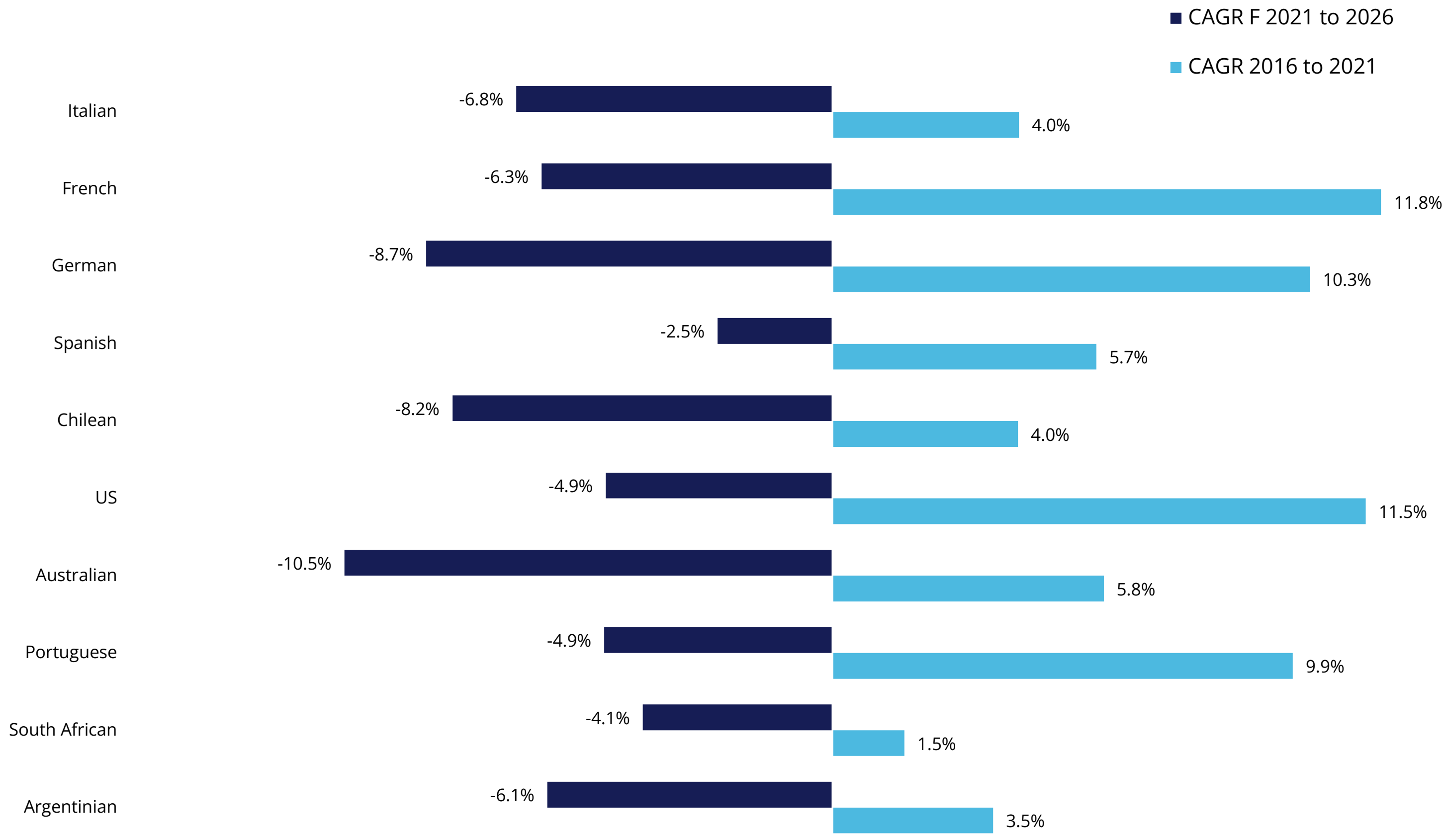
# Still wine forecasts by origin

Volumes of still wine from all origins increased between 2016 and 2021; however, volumes are forecast to decline in the coming years across all source countries

Still wines from Spain are expected to be the most stable

## Historic and forecast volume growth by country of origin

Five-year CAGR %




Source: IWSR

# Still wine retail price by origin

## Retail prices have recorded steady growth for all countries of origin, and are expected to remain relatively stable over the next five years

### Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

| | | Retail price per 0.75l 2021 (US$) | CAGR 16-21 | CAGR F 21-26 |
|---|---|---|---|---|
| | **Total** | **15.71** | **2.3%** | **0.2%** |
| 1 | **Italian** | **16.60** | **1.9%** | **0.5%** |
| 2 | **French** | **18.58** | **1.7%** | **-0.1%** |
| 3 | **German** | **14.99** | **3.7%** | **0.4%** |
| 4 | **Spanish** | **14.39** | **1.6%** | **-0.6%** |
| 5 | **Chilean** | **11.33** | **0.9%** | **0.2%** |
| 6 | **US** | **15.50** | **3.9%** | **0.5%** |
| 7 | **Australian** | **13.92** | **2.3%** | **0.4%** |
| 8 | **Portuguese** | **13.57** | **1.9%** | **-0.1%** |
| 9 | **South African** | **14.02** | **2.8%** | **-0.3%** |
| 10 | **Argentinian** | **14.60** | **2.5%** | **0.6%** |

Q: What do market experts say?

"Spending has been increasing, especially how much people spend per bottle."

*Wine journalist, Norway*

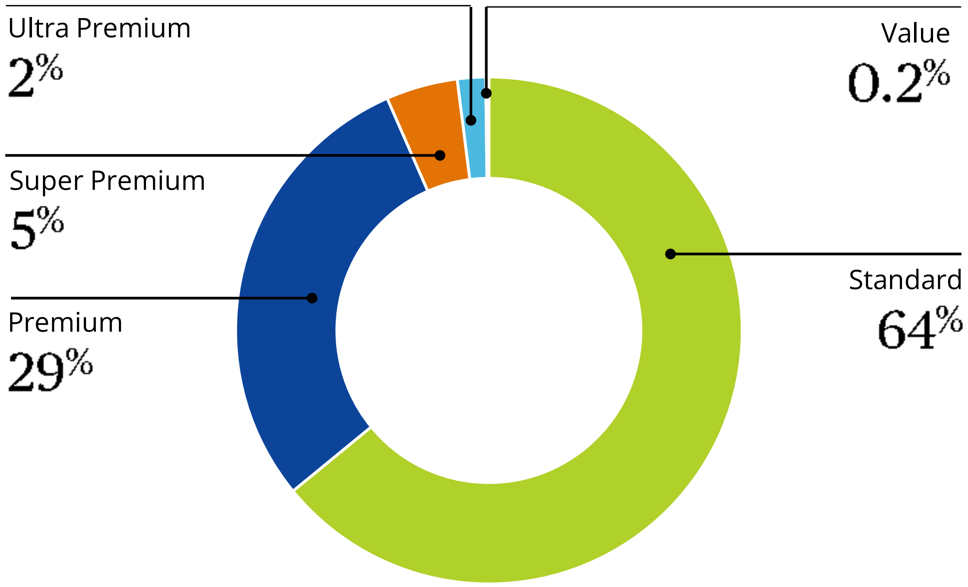
Source: IWSR

# Still wine by price band

## While most of the Norwegian market is wine at standard price points, this is the area where volume is decreasing, while premium-and-above price brands have increased volumes

### Still wine by price brand

% of purchases that fall within the categories below




### Still wine volumes by price band

000s 9-litre cases

| | 2020 | 2021 |
|---|---|---|
| **Value (under 70.00 kroner)** | **5.06** | **15.78** |
| **Standard (70.00 to 117.49 kroner)** | **6,448.24** | **6,208.27** |
| **Premium (117.50 to 176.49 kroner)** | **2,693.67** | **2,843.21** |
| **Super Premium (176.50 to 293.99 kroner)** | **368.72** | **443.62** |
| **Ultra Premium (294.00 kroner and above)** | **144.75** | **178.70** |

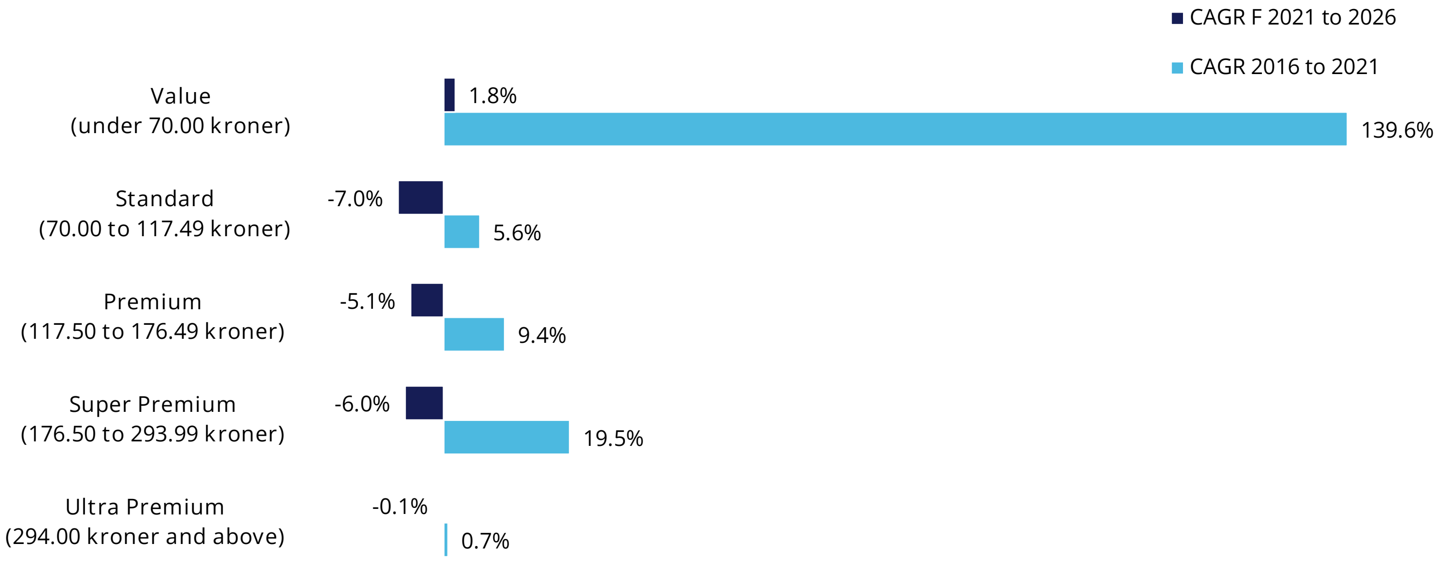
Source: IWSR

# Still wine growth by price band

## Significant premiumisation took place in the market between 2016 and 2021, with premium-and-above price brands recording notable growth; lower-priced wine, under 125 kroner, is forecast to remain relatively stable

### Historic and forecast volume growth by price band

Five-year CAGR %




Source: IWSR

Q: What do market experts say?

"The mass market will always be the cheap wines, but the curve is flattening out or going down ."

*Wine journalist, Norway*

# Still wine consumption per capita

Norway falls just outside of the top 20 for still wine per capita consumption, consuming approximately half as much as Portugal, Italy and Montenegro. Per capita consumption has increased since 2016 but was relatively stable from 2020 to 2021

## Per capita consumption of still wine

Liters per annum (adult LDA+ population)

| | | 2020 | 2021 | CAGR 16-21 | CAGR 20-21 |
|---|---|---|---|---|---|
| 1 | Portugal | 38.85 | 43.00 | -1.4% | 10.7% |
| 2 | Italy | 42.75 | 41.77 | -1.3% | -2.1% |
| 3 | Montenegro | 38.63 | 41.77 | -1.6% | 7.9% |
| 4 | Slovenia | 37.71 | 37.63 | -2.7% | -0.3% |
| 5 | Switzerland | 36.56 | 36.14 | -0.7% | -0.6% |
| 6 | France | 37.44 | 35.75 | -4.1% | -4.1% |
| 7 | Denmark | 33.08 | 33.37 | 0.5% | 1.4% |
| 8 | Hungary | 30.95 | 31.52 | -0.2% | 1.6% |
| 9 | Austria | 31.02 | 30.93 | -0.6% | 0.0% |
| 10 | US Virgin Islands | 26.36 | 28.15 | -1.8% | 6.7% |
| 11 | Greece | 25.46 | 27.95 | -3.2% | 9.5% |
| 12 | Germany | 28.57 | 27.78 | -0.8% | -3.0% |
| 13 | Turks and Caicos | 23.14 | 27.56 | -2.9% | 21.7% |
| 14 | St. Barths | 21.50 | 26.57 | n/a | 24.6% |
| 15 | Uruguay | 26.99 | 25.62 | 0.7% | -4.5% |
| 16 | Argentina | 28.71 | 25.14 | -2.1% | -11.5% |
| 17 | Sweden | 24.46 | 23.83 | 1.5% | -1.9% |
| 18 | Romania | 24.01 | 23.73 | 2.3% | -1.4% |
| 19 | Slovakia | 22.77 | 22.95 | -0.8% | 0.7% |
| 20 | Spain | 20.00 | 22.31 | -1.1% | 11.7% |
| 27 | Norway | 20.24 | 20.13 | 7.4% | 0.3% |

Source: IWSR

# Sparkling wine volumes by origin

## Italian, French and Spanish wines make up 90% of the sparkling wine market in Norway; volumes increased for most countries of origin from 2020 to 2021

### Total sparkling wine volumes and market share by origin

000s 9-litre cases

| | | 2020 | 2021 | Market Share |
|---|---|---|---|---|
| | **Total** | **949.70** | **1,067.65** | |
| 1 | **Italian** | **418.05** | **452.81** | **42%** |
| 2 | **French** | **265.50** | **341.76** | **32%** |
| 3 | **Spanish** | **166.80** | **162.28** | **15%** |
| 4 | **Austrian** | **25.25** | **30.00** | **3%** |
| 5 | **Australian** | **31.00** | **29.75** | **3%** |
| 6 | **German** | **15.40** | **18.55** | **2%** |
| 7 | **Portuguese** | **9.75** | **9.85** | **1%** |
| 8 | **United Kingdom** | **5.00** | **8.57** | **1%** |
| 9 | **South African** | **5.90** | **7.65** | **1%** |
| 10 | **Chilean** | **3.15** | **3.23** | **0.3%** |

Q: What do market experts say?

"Because 2020 and 2021 lacked celebration occasions, people were finding more low-key occasions to drink sparkling wine and I can imagine that being more of a long-term trend, where it's no longer the big parties or celebrations when you open a bottle."

*Market analyst, Norway*

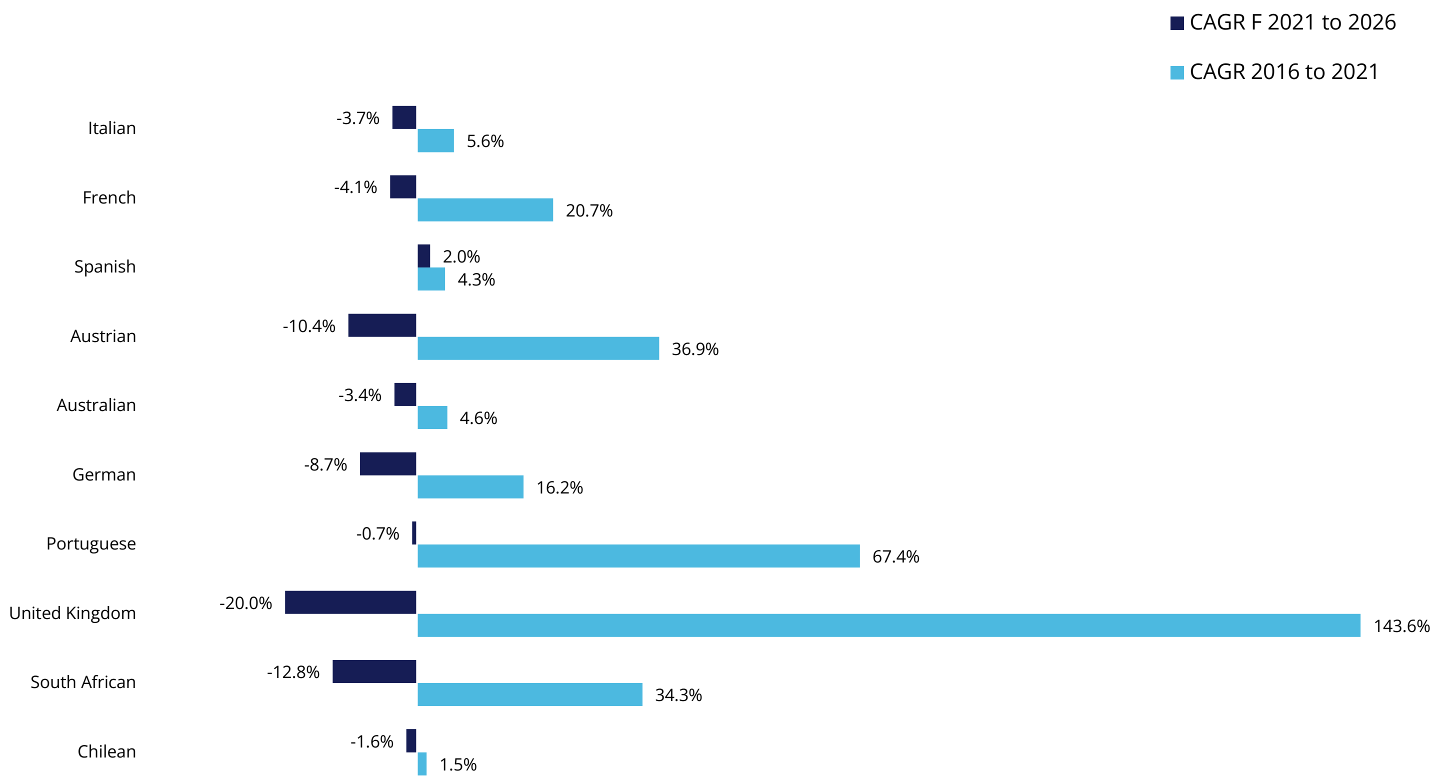
Source: IWSR

# Sparkling wine growth by country of origin

Out of the top three countries, French sparkling wines had the largest growth from 2016 to 2021, with an increase of almost 21%, on the back of growing popularity of crémant. In future years, sparkling wine is expected to remain relatively stable across most countries

## Historic and forecast growth by country of origin

Five-year CAGR %



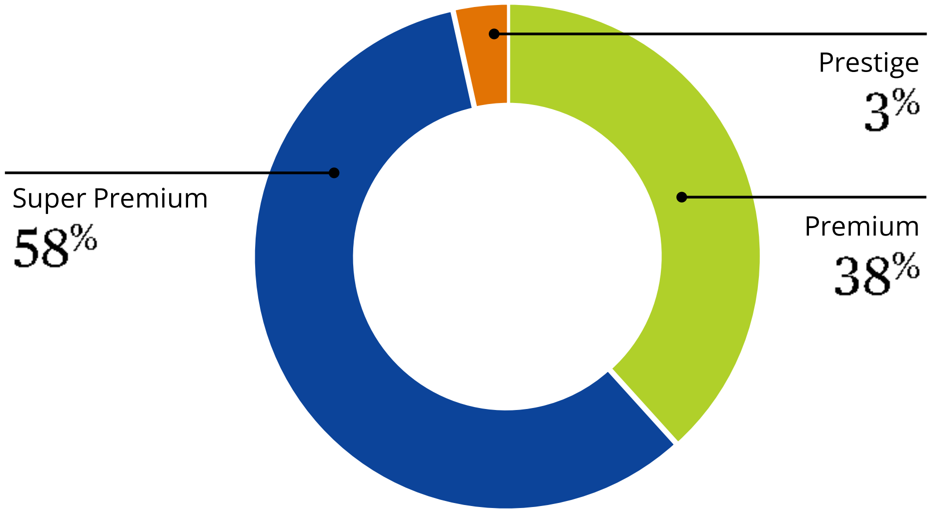

Source: IWSR

# Champagne by price band

## The vast majority of Champagne is bought in premium and super-premium price bands; all price bands grew between 2020 and 2021, suggesting a premiumization trend

### Champagne by price brand

% of purchases that fall within the categories below




### Champagne volumes by price band

000s 9-litre cases

| | 2020 | 2021 |
|---|---|---|
| **Premium (349.99 kroner and below)** | **28.50** | **36.50** |
| **Super Premium (350.00 - 699.99 kroner)** | **47.00** | **55.50** |
| **Prestige (700.00 kroner and over)** | **2.50** | **3.30** |

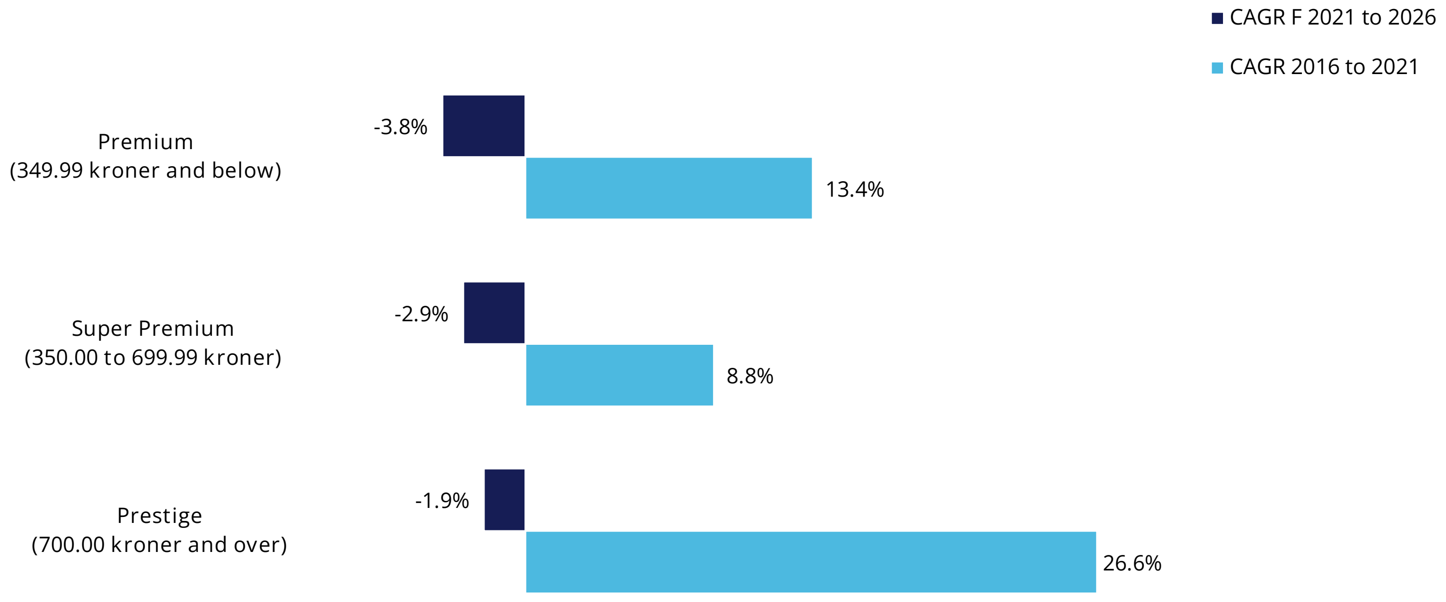
Source: IWSR

# Champagne growth by price band

All Champagne price bands saw an increase in the last five years, most likely due to Norwegians being unable to travel to Sweden to buy wine more cheaply. Premium and prestige wines have recorded the highest growth since 2016

## Historic and forecast growth by price band

Five-year CAGR %



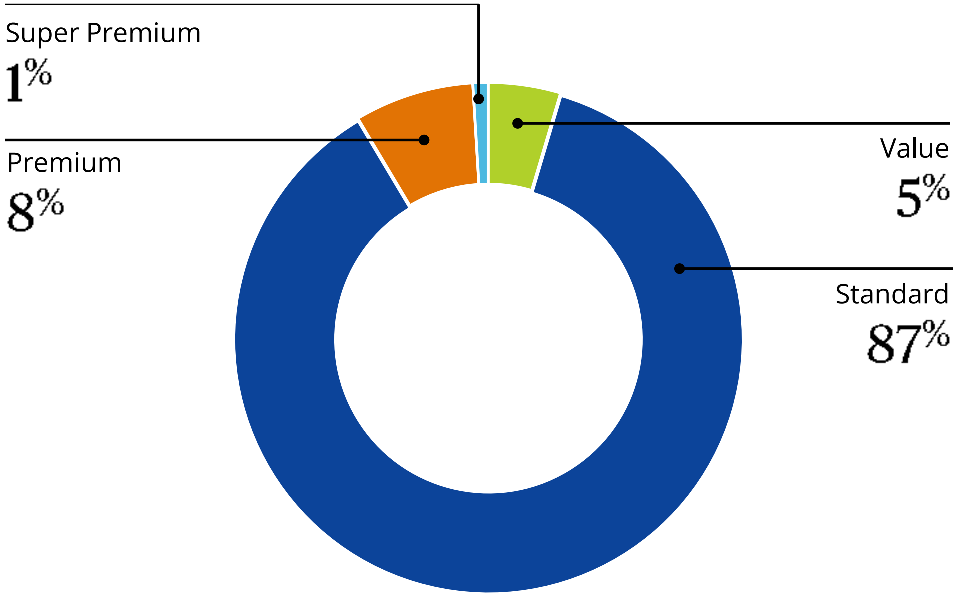

Source: IWSR

# Other sparkling wine by price band

## As with still wine, the bulk of growth in sparkling wine is coming from the standard price band

### Other sparkling wine by price brand

% of purchases that fall within the categories below




### Other sparkling wine volumes by price band

000s 9-litre cases

| | 2020 | 2021 |
|---|---|---|
| Value (under 80.00 kroner) | 45.50 | 44.58 |
| Standard (between 80.00 and 139.99 kroner) | 760.80 | 844.50 |
| Premium (between 140.00 and 199.99 kroner) | 59.90 | 74.00 |
| Super Premium (200.00 kroner and above) | 5.5 | 9.27 |

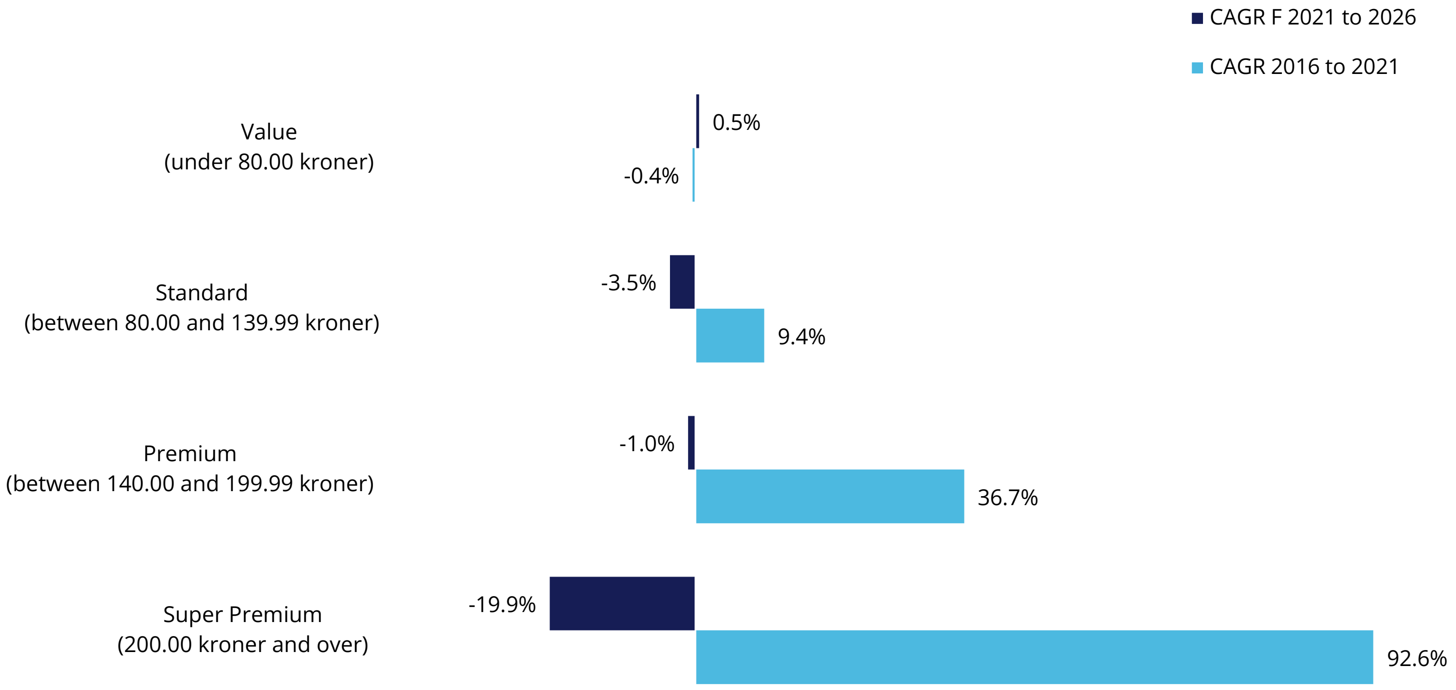
Source: IWSR

# Other sparkling wine growth by price band

Standard-and-above price points all saw growth in 2016–21, with super-premium showing the most spectacular rise, most likely due to the onshoring of spend during COVID. Volumes are expected to stabilise over the next five years, with super-premium sales falling back with the end of COVID-era travel restrictions

## Historic and forecast growth by price band

Five-year CAGR %




Q: What do market experts say?

"Crémant is doing really well. What we're seeing is this premiumisation of crémant, with a potential of a bit of a plateau in the future. As the price of crémant increases, it starts to impinge on the lower end of Champagne, and people will definitely choose a lower end Champagne vs a higher end crémant because of that brand image."

*Market analyst, Norway*

Source: IWSR

# Sparkling wine consumption per capita

Norway's per capita consumption of sparkling wine has been increasing since 2016, and it now ranks 28th. Consumption in St Barths and Turks & Caicos has increased considerably since 2020, probably due to relaxed COVID restrictions and the ability to travel

## Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

| | | 2020 | 2021 | CAGR 16-21 | CAGR 20-21 |
|---|---|---|---|---|---|
| 1 | St. Barths | 7.03 | 9.77 | n/a | 38.9% |
| 2 | Italy | 7.51 | 7.79 | 2.4% | 3.8% |
| 3 | Turks and Caicos | 5.34 | 6.64 | -6.0% | 24.5% |
| 4 | Germany | 5.53 | 5.57 | -2.1% | 0.6% |
| 5 | Lithuania | 4.40 | 4.88 | 3.0% | 11.0% |
| 6 | France | 4.33 | 4.74 | -2.3% | 9.3% |
| 7 | Latvia | 4.61 | 4.47 | 2.3% | -3.1% |
| 8 | Belgium and Luxembourg | 4.01 | 4.28 | -1.7% | 6.8% |
| 9 | Martinique | 3.90 | 4.19 | -6.2% | 7.4% |
| 10 | Guadeloupe | 3.57 | 4.15 | -4.7% | 16.4% |
| 11 | Estonia | 3.60 | 4.08 | 2.4% | 13.4% |
| 12 | Austria | 3.17 | 3.44 | -0.2% | 8.5% |
| 13 | Sweden | 3.05 | 3.34 | 10.1% | 9.7% |
| 14 | Switzerland | 2.93 | 3.23 | 1.1% | 10.3% |
| 15 | United Kingdom | 2.87 | 3.22 | 2.0% | 12.0% |
| 16= | Cayman Islands | 3.14 | 3.18 | 3.2% | 1.3% |
| 16= | Australia | 2.98 | 3.18 | 4.8% | 6.9% |
| 18 | New Zealand | 3.06 | 3.11 | -0.2% | 1.6% |
| 19 | Czech Republic | 2.56 | 2.90 | 10.0% | 13.4% |
| 20 | Slovenia | 2.80 | 2.89 | 3.7% | 3.3% |
| 28 | Norway | 1.99 | 2.22 | 9.2% | 11.5% |

Source: IWSR

# Fortified wine volumes: Current and historical

## Fortified wines from Portugal and France have recorded growth in volumes over the past five years; together, Portuguese and Spanish fortified wines make up 95% of the market

### Fortified wine volumes and market share by origin

000s 9-liter cases

| | 2020 | 2021 | CAGR 16-21 | CAGR F 21-26 | Market Share |
|---|---|---|---|---|---|
| **Total** | 40.40 | 40.90 | 6.0% | -3.0% | |
| **Portuguese** | 29.40 | 30.10 | 8.9% | n/a | 74% |
| **Spanish** | 9.00 | 8.40 | -1.9% | n/a | 21% |
| **French** | 1.00 | 1.10 | 2.83% | n/a | 3% |

Source: IWSR
No data available for forecast

# Market Demographics

## Norway Wine Landscapes

2022

# Market Demographics

## Key takeaways

### 1. The number of regular wine drinkers has fallen

Since 2017, the number of monthly wine drinkers has decreased significantly, while the proportion of those regular wine drinkers who consume the beverage on a weekly basis has remained constant.

### 2. Wine drinkers are older and richer

Boomers now represent almost half of all regular wine drinkers, a significant jump from 2017. The proportion of regular wine drinkers with incomes above 1 million kroner has increased significantly since 2017, while those with incomes of less than 259,999 kroner have decreased.

# Norwegian regular wine drinkers

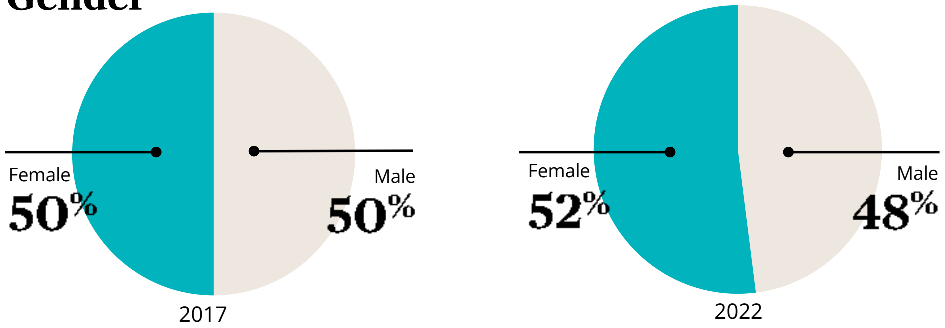
## Since 2017, the regular and weekly wine drinking population has decreased notably, while the proportion of regular wine drinkers who are consuming the beverage on a weekly basis has remained unchanged


1 Statistisk sentralbyrå
2 Wine Intelligence online calibration study with YouGov, February 2015, (n = 1,005) Norwegian adults. Wine=still light wine (red, white, rosé)
3 Wine Intelligence online calibration study with YouGov, rolling average of February 2019 and February 2021, (n ≥ 1,006) Norwegian adults. Wine=still light wine (red, white, rosé)
4 Wine Intelligence, Vinitrac® Norway, May 2017 (n=506) Norwegian regular wine drinkers
5 Wine Intelligence, Vinitrac® Norway, July 2022 (n=504) Norwegian regular wine drinkers

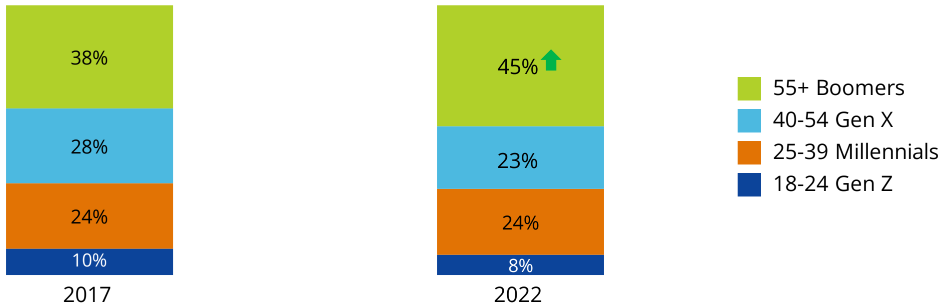
# Demographics of regular wine drinkers

The population of regular drinkers is getting older and wealthier, with nearly half aged over 55 and earning 650,000 kroner or more; women now make up the majority of regular wine drinkers

## Gender




## Generation cohorts




## Regions: Top 10

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Oslo | **16%** | **18%** | ➡ |
| Akershus | **11%** | **15%** | ➡ |
| Hordaland | **10%** | **9%** | ➡ |
| Vestfold | **6%** | **7%** | ➡ |
| Buskerud | **5%** | **6%** | ➡ |
| Østfold | **5%** | **6%** | ➡ |
| Rogaland | **7%** | **6%** | ➡ |
| Sør-Trøndelag | **9%** | **5%** | ⬇ |
| Hedmark | **3%** | **5%** | ➡ |
| Telemark | **2%** | **4%** | ➡ |

## Total household income

| | 2017 | 2022 | Tracking vs '17 |
|---|---|---|---|
| Less than 259.999 kroner | **10%** | **6%** | ⬇ |
| 260.000 - 449.999 kroner | **19%** | **16%** | ➡ |
| 450.000 - 649.999 kroner | **16%** | **18%** | ➡ |
| 650.000 - 999.999 kroner | **25%** | **26%** | ➡ |
| Above 1.000.000 kroner | **15%** | **21%** | ⬆ |

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# Drinking Repertoire

## Norway Wine Landscapes

2022

# Drinking Repertoire

Key takeaways

## 1. Many top alcohol categories have grown since 2017

Consumptions of red wine, beer, Prosecco and cider have all increased significantly since 2017, while Champagne and cava have decreased significantly. This suggests that many Norwegian regular wine drinkers are opting for Prosecco in the sparkling wine category and red wine in the still wine category.

## 2. Red on the rise with regular wine drinkers

Red wine consumption has increased, but the consumption has remained consistent across all varietals since 2017 and 2018, suggesting that Norwegian regular wine drinkers enjoy a wide range of red styles.

# Drinking repertoire

Consumption of many of the top alcoholic beverages has increased since 2017, including red wine and Prosecco. In neighboring Sweden, regular wine drinkers are narrowing their drinking repertoires, which doesn't seem to be the case for most in Norway. In sparkling wine, Norwegian wine drinkers are leaning more towards Prosecco than Champagne and Cava

## Alcoholic beverage repertoire: Top 15 tracking

% who have drunk the following beverages in the past 12 months
Base = All Norwegian regular wine drinkers (n≥504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking | |
|---|---|---|---|---|---|---|
| | | | | | vs. '17 | vs. '18 |
| 1 | Red wine | 86% | 89% | 91% | ↑ | → |
| 2 | White wine | 85% | 89% | 86% | → | → |
| 3 | Beer | 72% | 81% | 82% | ↑ | → |
| 4 | Prosecco | 43% | 50% | 52% | ↑ | → |
| 5 | Rosé wine | 44% | 50% | 47% | → | → |
| 6 | Cider | 35% | 40% | 45% | ↑ | → |
| 7 | Gin | 33% | 32% | 39% | → | ↑ |
| 8 | Vodka | 42% | 41% | 37% | → | → |
| 9 | Champagne | 44% | 37% | 35% | ↓ | → |
| 10 | Whisky / Whiskey | 35% | 36% | 32% | → | → |
| 11 | Liqueurs | 34% | 29% | 31% | → | → |
| 12= | Cocktails | 29% | 26% | 29% | → | → |
| 12= | Cava | 39% | 35% | 29% | ↓ | ↓ |
| 14 | Brandy / Cognac | 33% | 30% | 28% | → | → |
| 15 | Other sparkling wine | 26% | 21% | 22% | → | → |

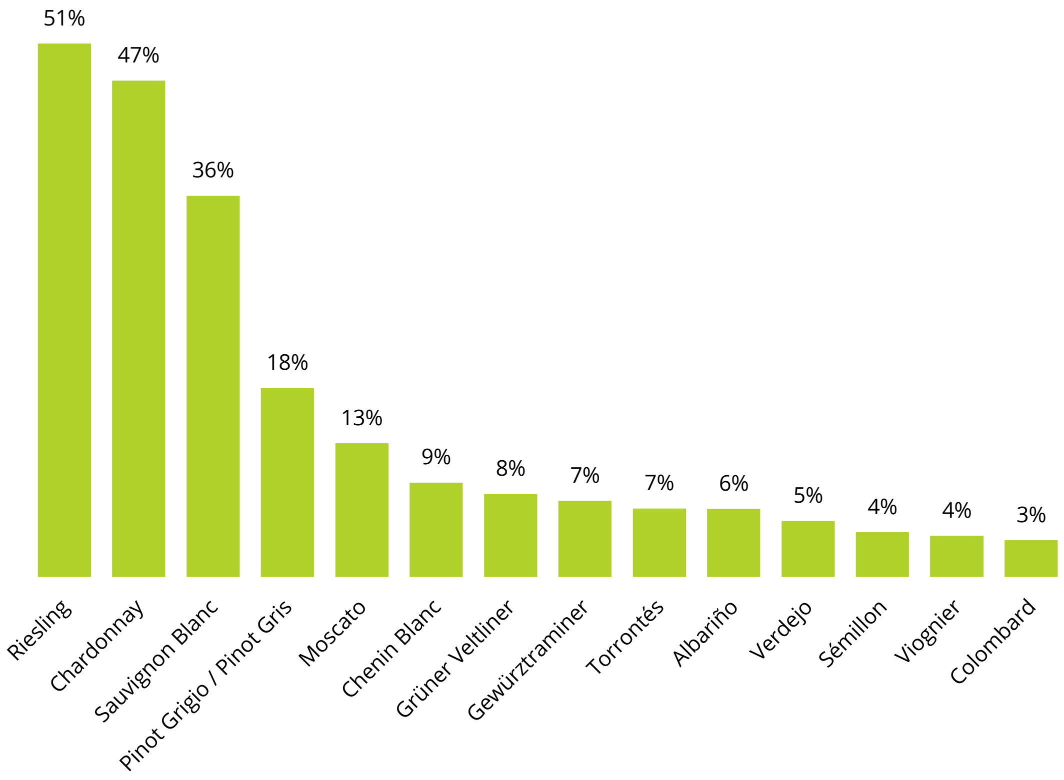
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# White varietal consumption

## Consumption incidences of white varietals have remained relatively stable over the last five years, with Riesling, Chardonnay and Sauvignon Blanc remaining in the top three

### White varietal consumption

% who have drunk the following varietals or wine types in the past six months
Base = All Norwegian regular wine drinkers (n=504)




### White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Riesling | 53% | 54% | 51% | → | → |
| 2 | Chardonnay | 47% | 48% | 47% | → | → |
| 3 | Sauvignon Blanc | 35% | 39% | 36% | → | → |
| 4 | Pinot Grigio / Pinot Gris | 21% | 23% | 18% | → | ↓ |
| 5 | Moscato | 14% | 15% | 13% | → | → |
| 6 | Chenin Blanc | 6% | 7% | 9% | ↑ | → |
| 7 | Grüner Veltliner | 7% | 8% | 8% | → | → |
| 8= | Gewürztraminer | 6% | 7% | 7% | → | → |
| 8= | Torrontés | 6% | 6% | 7% | → | → |
| 10 | Albariño | 3% | 5% | 6% | ↑ | → |
| 11 | Verdejo | 3% | 5% | 5% | → | → |
| 12= | Sémillon | 3% | 5% | 4% | → | → |
| 12= | Viognier | 2% | 3% | 4% | → | → |
| 14 | Colombard | 2% | 3% | 3% | → | → |

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

Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

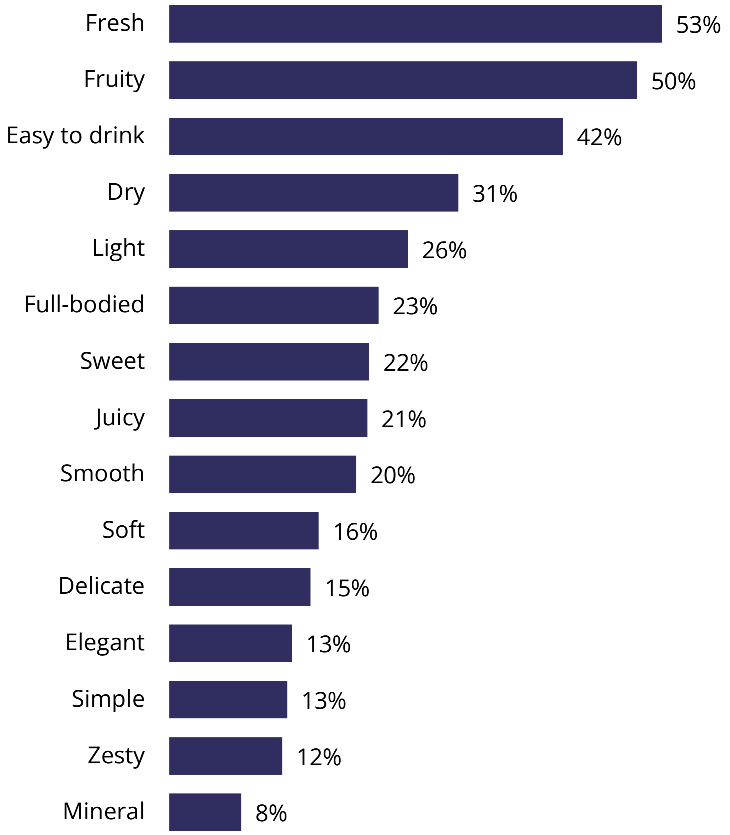
HOT TOPIC

# White wine attributes

## Half of Norwegian regular wine drinkers say their ideal white wine profile is fresh or fruity

### Ideal white wine attributes: Top 15

% who select each description for their ideal white wine
Base = All Norwegian regular wine drinkers (n=504)




**Demographic insights**

- Significantly more female drinkers say their ideal wine would have light characteristics than regular wine drinkers in general.
- Millennial wine drinkers shied away from saying their ideal white wine would be fresh and were more likely to suggest it would be have buttery and creamy flavours, when compared to all regular wine drinkers

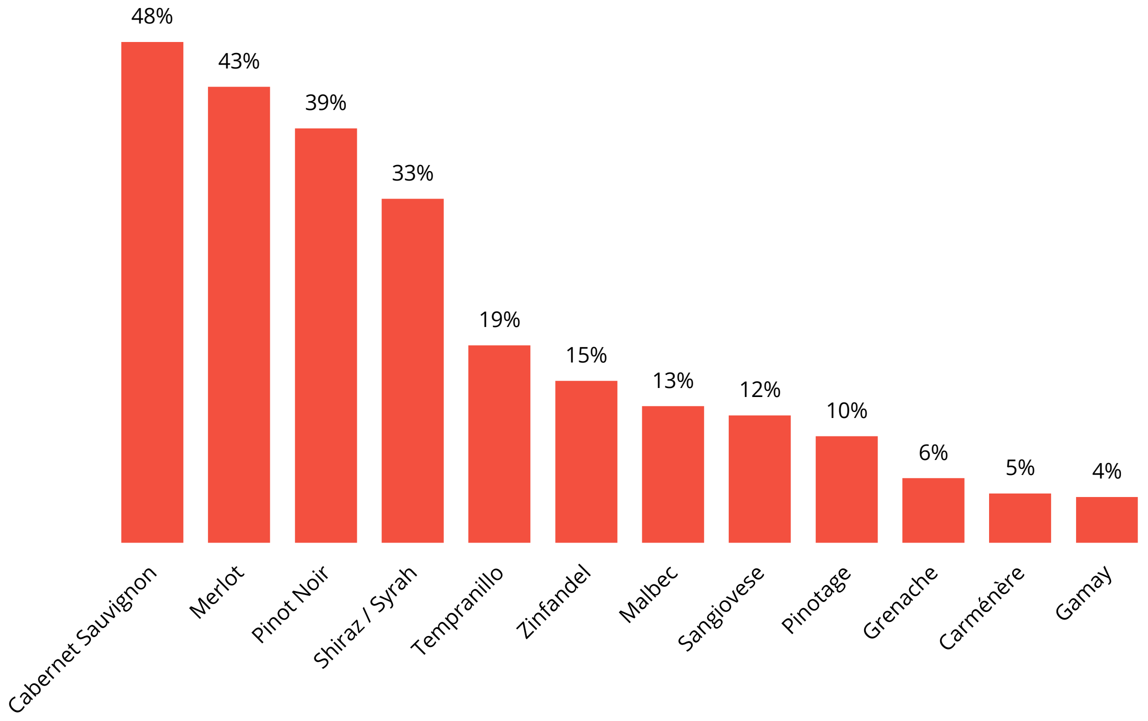
Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Red varietal consumption

## While consumption of red wine has increased, the split between varietals has remained constant over the last five years, with Cabernet Sauvignon, Merlot and Pinot Noir remaining as the top three

### Red varietal consumption

% who have drunk the following varietals or wine types in the past six months
Base = All Norwegian regular wine drinkers (n=504)




### Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Cabernet Sauvignon | 50% | 50% | 48% | ➡ | ➡ |
| 2 | Merlot | 44% | 44% | 43% | ➡ | ➡ |
| 3 | Pinot Noir | 34% | 35% | 39% | ➡ | ➡ |
| 4 | Shiraz / Syrah | 33% | 35% | 33% | ➡ | ➡ |
| 5 | Tempranillo | 17% | 18% | 19% | ➡ | ➡ |
| 6 | Zinfandel | 13% | 16% | 15% | ➡ | ➡ |
| 7 | Malbec | 15% | 14% | 13% | ➡ | ➡ |
| 8 | Sangiovese | 11% | 14% | 12% | ➡ | ➡ |
| 9 | Pinotage | 10% | 11% | 10% | ➡ | ➡ |
| 10 | Grenache | 6% | 8% | 6% | ➡ | ➡ |
| 11 | Carménère | 5% | 5% | 5% | ➡ | ➡ |
| 12 | Gamay | 2% | 5% | 4% | ➡ | ➡ |

Source: Wine Intelligence, Vinitrac® Norway, May ’17, Jul ’18, Jul ’22 (n≥504) Norwegian regular wine drinkers

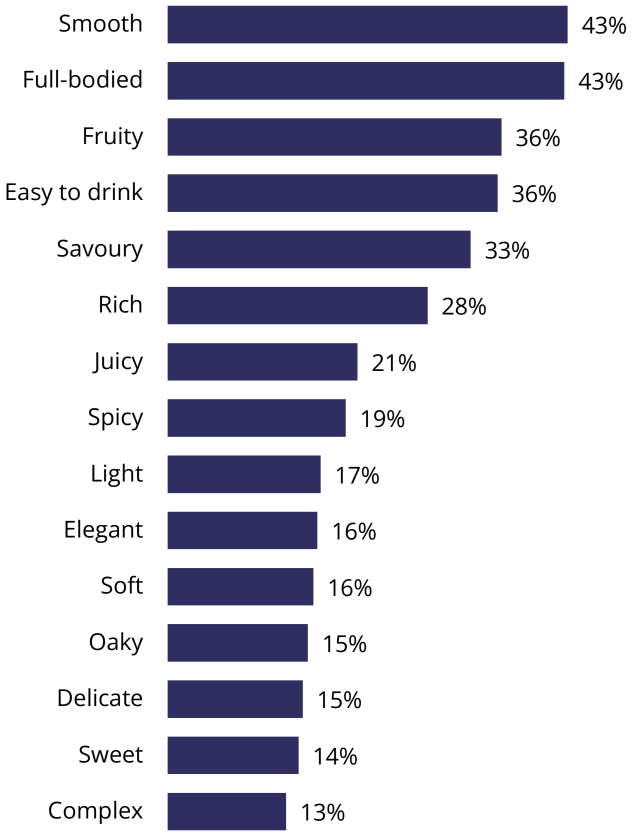
HOT TOPIC

# Red wine attributes

## Roughly four in 10 Norwegian regular wine drinkers said their ideal white wine profile features smooth or full-bodied characteristics

### Ideal red wine attributes: Top 15

% who select each description for their ideal red wine
Base = All Norwegian regular wine drinkers (n=504)




**Demographic insights**

- Millennial wine drinkers were less likely to suggest their ideal red would include smooth or full-bodied characteristics, instead favouring a red that is complex
- Significantly more Norwegian Boomer drinkers say their ideal red would be oaky

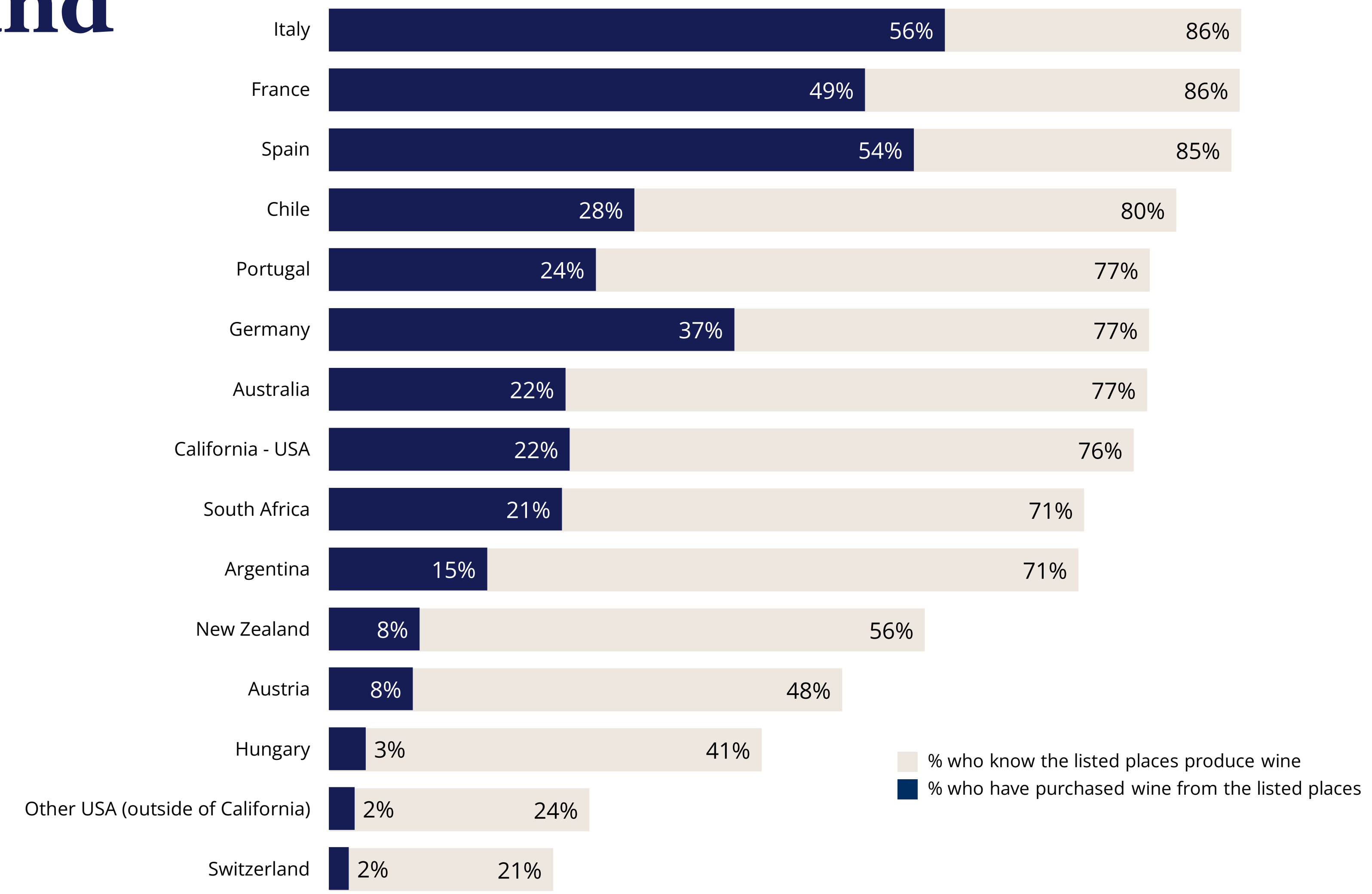
Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Country of origin consumption and awareness

Italy, France and Spain top both consumption and awareness rankings, with consumption incidences nearly double those of most New World countries; Germany's purchase incidence is relatively high considering its awareness levels

## Country of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following places
Base = All Norwegian regular wine drinkers (n=504)




Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Country of origin awareness

Italy and Spain are two of the top three countries of origin, but have experienced declining awareness, while France has remained broadly stable

## Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Norwegian regular wine drinkers (n≥504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1= | Italy | 91% | 87% | 86% | ↓ | → |
| 1= | France | 90% | 88% | 86% | → | → |
| 3 | Spain | 89% | 87% | 85% | ↓ | → |
| 4 | Chile | 82% | 81% | 80% | → | → |
| 5= | Portugal | 81% | 77% | 77% | → | → |
| 5= | Germany | 78% | 75% | 77% | → | → |
| 5= | Australia | 79% | 77% | 77% | → | → |
| 8 | California - USA | 75% | 72% | 76% | → | → |
| 9= | South Africa | 76% | 72% | 71% | → | → |
| 9= | Argentina | 76% | 72% | 71% | ↓ | → |
| 11 | New Zealand | 58% | 53% | 56% | → | → |
| 12 | Austria | n/a | n/a | 48% | n/a | n/a |
| 13 | Hungary | n/a | n/a | 41% | n/a | n/a |
| 14 | Other USA (outside of California) | 35% | 32% | 24% | ↓ | ↓ |
| 15 | Switzerland | 17% | 22% | 21% | → | → |

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Country of origin consumption

Italy's consumption incidence has decreased since 2018, as has that of France, even though France's awareness incidence has remained broadly stable over the five-year period

## Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Norwegian regular wine drinkers (n≥504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Italy | 56% | 62% | 56% | → | ↓ |
| 2 | Spain | 56% | 56% | 54% | → | → |
| 3 | France | 53% | 55% | 49% | → | ↓ |
| 4 | Germany | 33% | 37% | 37% | → | → |
| 5 | Chile | 33% | 32% | 28% | → | → |
| 6 | Portugal | 24% | 26% | 24% | → | → |
| 7= | California - USA | 18% | 19% | 22% | → | → |
| 7= | Australia | 24% | 25% | 22% | → | → |
| 9 | South Africa | 28% | 24% | 21% | ↓ | → |
| 10 | Argentina | 20% | 18% | 15% | ↓ | → |
| 11= | New Zealand | 7% | 10% | 8% | → | → |
| 11= | Austria | n/a | n/a | 8% | n/a | n/a |
| 13 | Hungary | n/a | n/a | 3% | n/a | n/a |
| 14= | Other USA (outside of California) | 3% | 4% | 2% | → | → |
| 14= | Switzerland | 0% | 2% | 2% | ↑ | → |

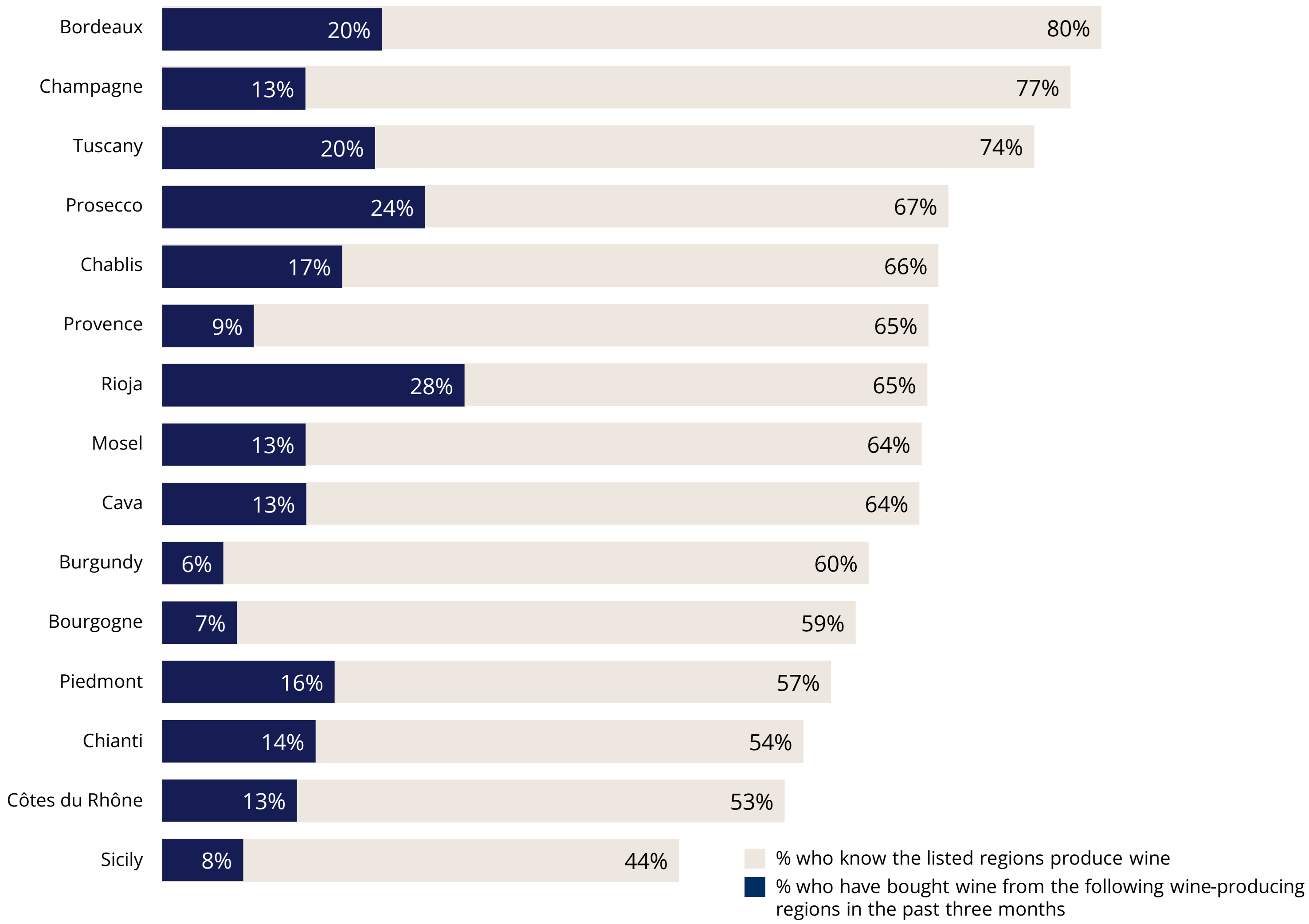
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Region of origin consumption and awareness

Although Rioja has lower awareness levels than Bordeaux, Champagne and Tuscany, it has the highest purchase incidence of all regions. The next highest-ranked regions for consumption are Prosecco, Tuscany and Bordeaux, showing that Norwegian regular wine drinkers are relatively more interested in Italian, French and Spanish wines

## Region of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following regions
Base = All Norwegian regular wine drinkers (n=504)




Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Region of origin awareness

The awareness levels of many regions of origin have remained stable over the five-year period, though Bordeaux, Champagne, Rioja and Mosel have all seen awareness drop. Prosecco, Bourgogne and Piedmont have all increased

Q: What do market experts say?

"Piedmont and Veneto wines have the greatest stability and potential for growth, because Norway consumers prefer a milder profile, with low oak content. I'm seeing that in some of the other Nordics as well "

*Market analyst, Norway*

## Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Bordeaux | **85%** | **82%** | **80%** | ↓ | → |
| 2 | Champagne | **85%** | **80%** | **77%** | ↓ | → |
| 3 | Tuscany | **77%** | **76%** | **74%** | → | → |
| 4 | Prosecco | **57%** | **63%** | **67%** | ↑ | → |
| 5 | Chablis | **69%** | **67%** | **66%** | → | → |
| 6= | Provence | **63%** | **63%** | **65%** | → | → |
| 6= | Rioja | **71%** | **67%** | **65%** | ↓ | → |
| 8= | Mosel | **70%** | **69%** | **64%** | ↓ | → |
| 8= | Cava | **64%** | **64%** | **64%** | → | → |
| 10 | Burgundy | **57%** | **59%** | **60%** | → | → |
| 11 | Bourgogne | **52%** | **57%** | **59%** | ↑ | → |
| 12 | Piedmont | **47%** | **49%** | **57%** | ↑ | ↑ |
| 13 | Chianti | **54%** | **55%** | **54%** | → | → |
| 14 | Côtes du Rhône | **49%** | **57%** | **53%** | → | → |
| 15 | Sicily | **39%** | **39%** | **44%** | → | → |
| 16 | Alsace | **42%** | **41%** | **38%** | → | → |

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Region of origin consumption

Many regions of origin have remained unchanged since 2017. Piedmont and Sicily have increased consumption levels, while the French and Spanish regions of Chablis, Côtes du Rhône, Burgundy and Cava have all decreased since 2018

## Region of origin consumption: Top 15, tracking

% who have bought wine from the following wine-producing regions in the past three months
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Rioja | 29% | 30% | 28% | → | → |
| 2 | Prosecco | 21% | 27% | 24% | → | → |
| 3= | Bordeaux | 23% | 23% | 20% | → | → |
| 3= | Tuscany | 18% | 21% | 20% | → | → |
| 5 | Chablis | 17% | 23% | 17% | → | ↓ |
| 6 | Piedmont | 10% | 12% | 16% | ↑ | ↑ |
| 7 | Chianti | 14% | 13% | 14% | → | → |
| 8= | Cava | 16% | 18% | 13% | → | ↓ |
| 8= | Mosel | 14% | 15% | 13% | → | → |
| 8= | Champagne | 14% | 14% | 13% | → | → |
| 8= | Côtes du Rhône | 13% | 17% | 13% | → | ↓ |
| 12 | Provence | 7% | 8% | 9% | → | → |
| 13 | Sicily | 4% | 5% | 8% | ↑ | → |
| 14 | Bourgogne | 7% | 8% | 7% | → | → |
| 15 | Burgundy | 8% | 9% | 6% | → | ↓ |
| 16 | Sancerre | 6% | 6% | 5% | → | → |

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Wine-Buying Behaviours

## Norway Wine Landscapes

2022

# Wine-Buying Behaviours

Key takeaways

## 1. Significant decrease in wine purchases from Sweden

Shopping channels involving international retailers (including in Sweden and overseas) have yet to recover from the pandemic, which is evident in the significant decrease in regular wine drinkers purchasing wines from Swedish and overseas retailers since 2018.

## 2. Typical spend in the off-trade is up

Norwegian wine drinkers are more frequently purchasing wine at premium price points in the off-trade, even though the consumption frequency has remained relatively stable. This suggests a shift towards premiumisation and reflects the impact of inflation.

## 3. The on-trade has yet to fully bounce back

There are general increases in mid-range spend levels, at prices between 190 and 219 kroner. There is less of a movement towards premium price points in the on–trade, an effect of COVID restrictions that has yet to bounce back.

# Wine-buying channel usage

More than four in five regular wine drinkers reported purchasing wines from Vinmonopolet in the last six months

## Wine-buying channel usage

% who have bought wine from the following channels in the past six months
Base = All Norwegian regular wine drinkers (n=504)


Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Wine-buying channel usage

Shopping channels involving international retailers (including Sweden and overseas) have yet to recover from the pandemic, which is evident in the significant decrease in regular wine drinkers buying wines from Swedish and overseas retailers since 2018

### Q: What do market experts say?

"As people weren't able to cross over to Sweden, people were buying domestically. So we see this massive increase in numbers in 2020, and that was maintained in 2021. So no increases in wine, really, but it was still quite impressive that they remained at that very high number. But that's anticipated to decline over the next few years as people go back to border trade in some form."

*Market analyst, Norway*

## Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | From Vinmonopolet | 84% | 82% | 85% | → | → |
| 2 | From Sweden / Systembolaget | 33% | 39% | 33% | → | ↓ |
| 3 | From duty free / at the airport | n/a | n/a | 31% | n/a | n/a |
| 4 | From an overseas retailer | 22% | 27% | 19% | → | ↓ |
| 5 | From a winery during a visit | n/a | n/a | 4% | n/a | n/a |
| 6= | From Finland / Alko | 2% | 3% | 2% | → | → |
| 6= | From a delivery app | n/a | n/a | 2% | n/a | n/a |
| | Other | 3% | 2% | 3% | → | → |

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Consumption frequency

The proportion of Norwegian regular wine drinkers consuming wine on an almost daily basis has significantly decreased since 2018. About half consume wine on a weekly basis, with a majority of Millennials and Boomers drinking wine at least once a week

## Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Norwegian regular wine drinkers (n≥504)

| | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|
| Most days / every day | **3%** | **5%** | **2%** | → | ↓ |
| 2-5 times a week | **19%** | **24%** | **23%** | → | → |
| About once a week | **35%** | **30%** | **34%** | → | → |
| 1-3 times a month | **43%** | **41%** | **42%** | → | → |

## Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Norwegian regular wine drinkers (n=504)

| | All Norwegian Regular Wine Drinkers (n=504) | 18-24 Gen Z (n=38) | 25-39 Millennials (n=123) | 40-54 Gen X (n=117) | 55+ Boomers (n=226) |
|---|---|---|---|---|---|
| Most days / every day | **2%** | **0%** | **2%** | **2%** | **2%** |
| 2-5 times a week | **23%** | **11%** | **20%** | **13%** | **31%** |
| About once a week | **34%** | **39%** | **38%** | **37%** | **29%** |
| 1-3 times a month | **42%** | **51%** | **40%** | **47%** | **38%** |

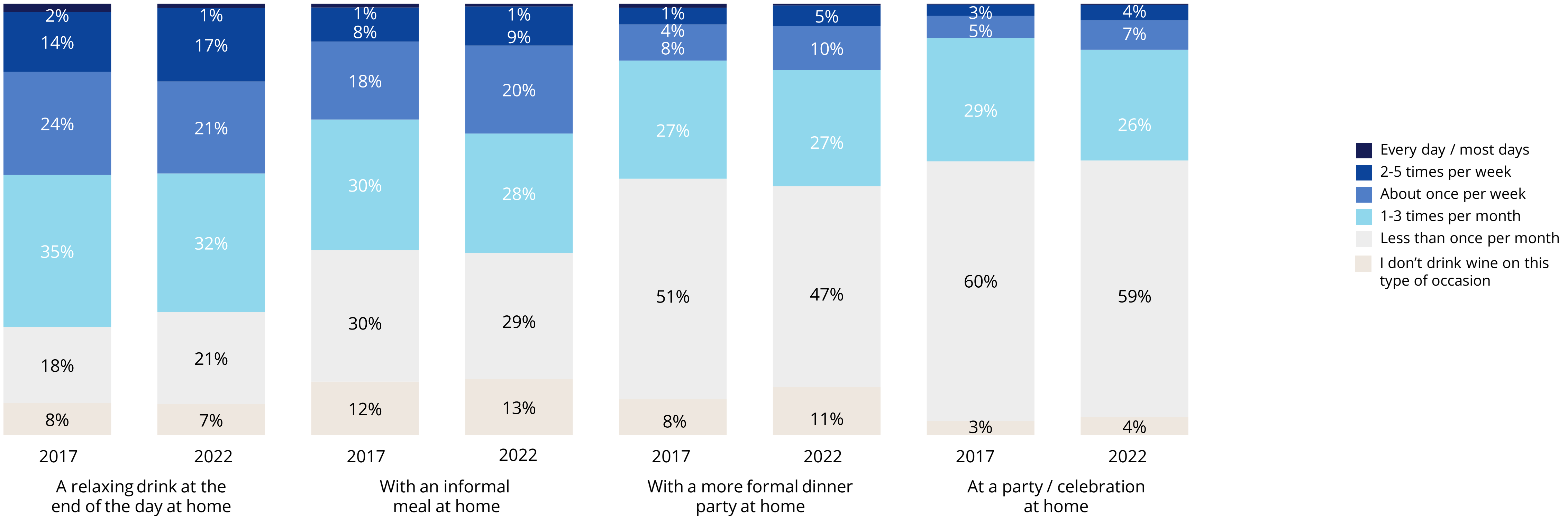
Grey shading: small sample size (n<50)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Off-trade consumption frequency

## Off-trade consumption frequency has remained relatively unchanged since 2017, indicating that the pandemic did not affect at-home consumption or, if it did, it has bounced back to pre-pandemic levels

### Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade




↑/↓: Statistically significantly higher / lower than May '17 at a 95% confidence level

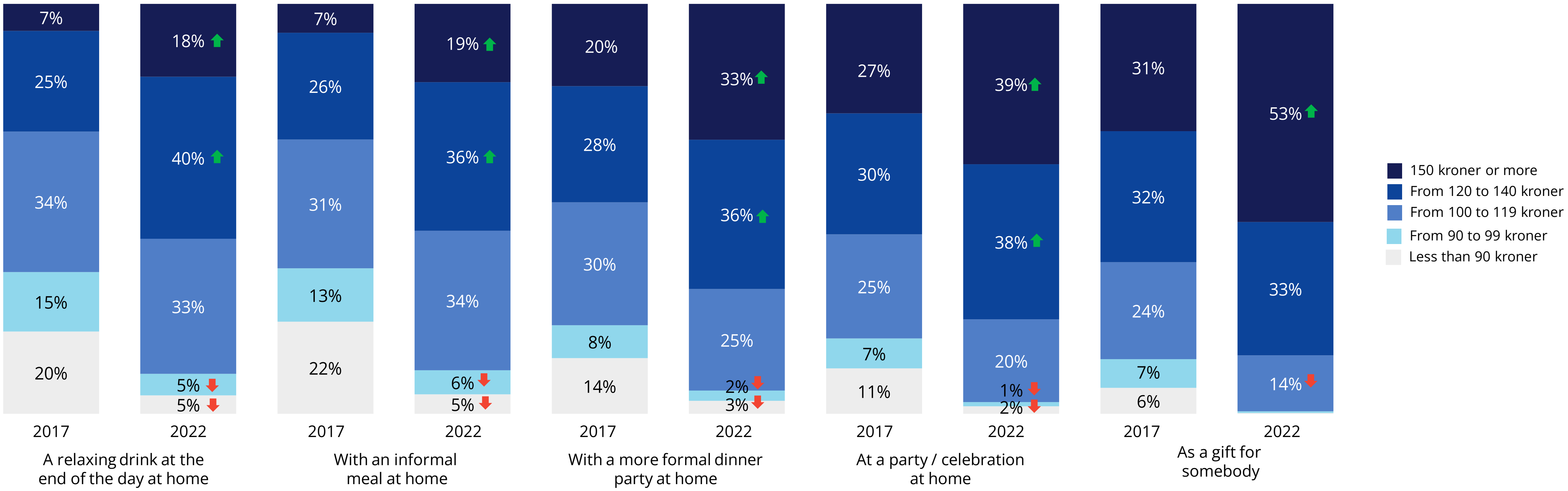
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# Off-trade spend

## Drinkers are more frequently purchasing wine at premium price points in the off-trade, even though consumption frequency has remained relatively stable, suggesting a move towards premiumisation

### Off-trade: Wine spend per bottle by occasion

Base = Those who buy wine in the off-trade




↑/↓: Statistically significantly higher / lower than May '17 at a 95% confidence level

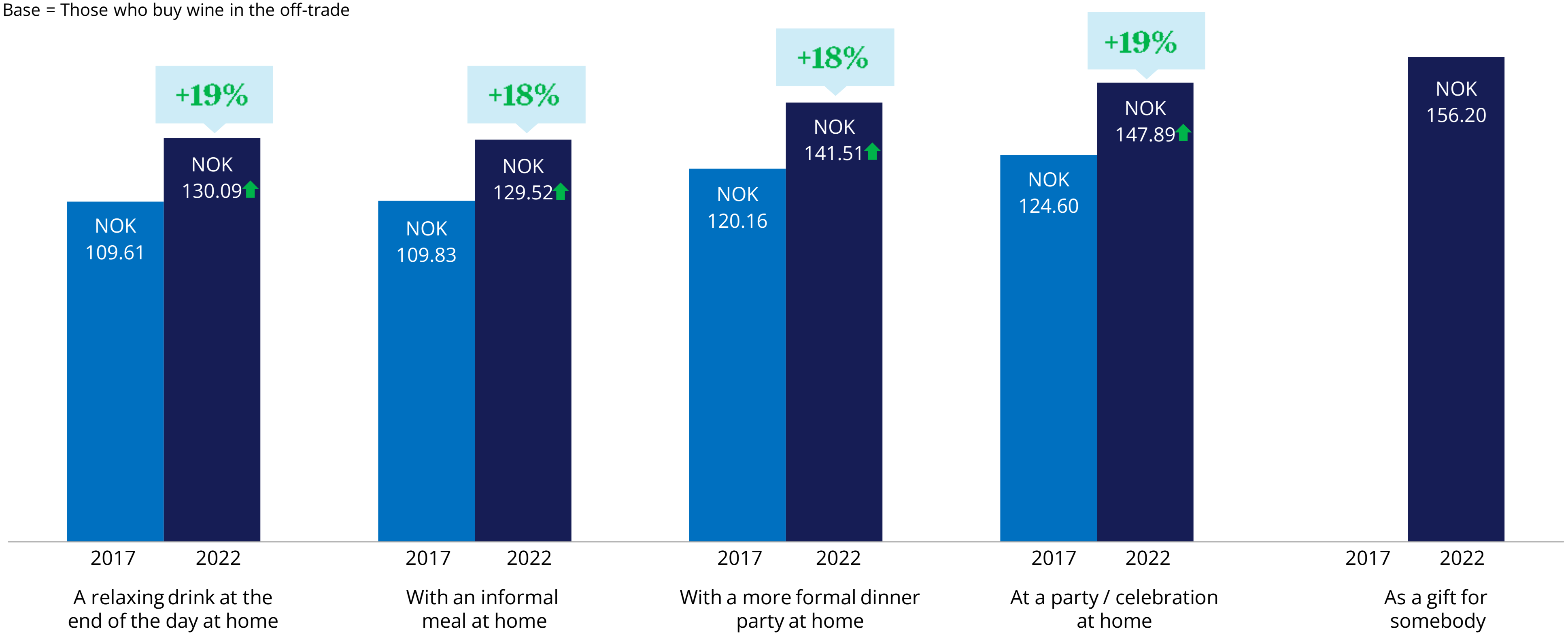
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# Off-trade spend

## While consumption is stable, typical spend in the off-trade has increased significantly, suggesting a premiumisation trend; other factors are inflation and a weaker local currency making wine more expensive

### Off-trade: Typical spend per bottle by occasion

Base = Those who buy wine in the off-trade




As a gift for somebody has no tracking

↑/↓: Statistically significantly higher / lower than May '17 at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# On-trade consumption

Wine consumption in the Norwegian on-trade doesn't seem to be suffering from have any lasting effects from the pandemic, unlike neighboring Sweden; Boomers are much less likely than Millennials to consume wine in a bar

Q: What do market experts say?

"The on-trade suffered greatly from COVID unfortunately. They have a huge lack of staff."

*Wine importer, Norway*

## Wine purchase in on-trade

% who buy wine in a bar, pub or restaurant
Base = All Norwegian regular wine drinkers (n≥504)

| On-trade location | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| Bar | Yes | 56% | 56% | 55% | ➡ | ➡ |
| | No | 44% | 44% | 45% | ➡ | ➡ |
| Restaurant | Yes | 87% | 86% | 85% | ➡ | ➡ |
| | No | 13% | 14% | 15% | ➡ | ➡ |

## Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Norwegian regular wine drinkers (n=504)

| On-trade location | | All Norwegian Regular Wine Drinkers (n=504) | 18-24 Gen Z (n=38) | 25-39 Millennials (n=123) | 40-54 Gen X (n=117) | 55+ Boomers (n=226) |
|---|---|---|---|---|---|---|
| Bar | Yes | 55% | 57% | 68% | 61% | 44% |
| | No | 45% | 43% | 32% | 39% | 56% |
| Restaurant | Yes | 85% | 74% | 91% | 88% | 83% |
| | No | 15% | 26% | 9% | 12% | 17% |

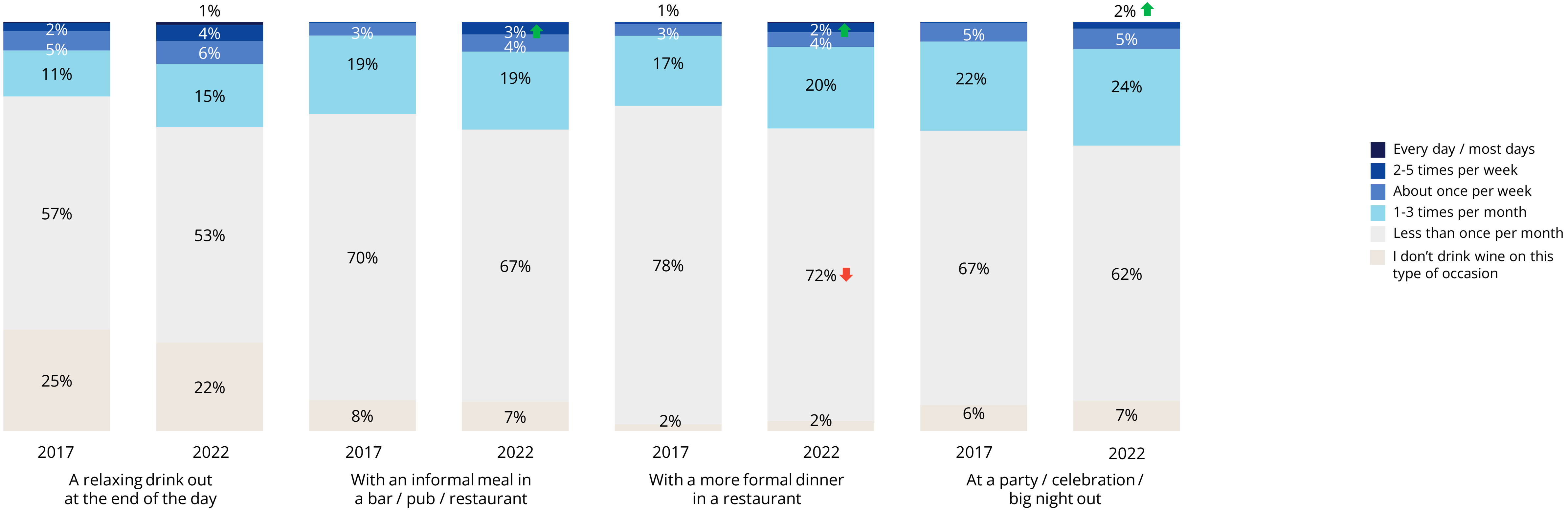
Grey shading: low sample size (n<50)
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# On-trade consumption frequency

## Those who have returned to the on-trade appear to be drinking wine there more often

### On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade




/: Statistically significantly higher / lower than May '17 at a 95% confidence level

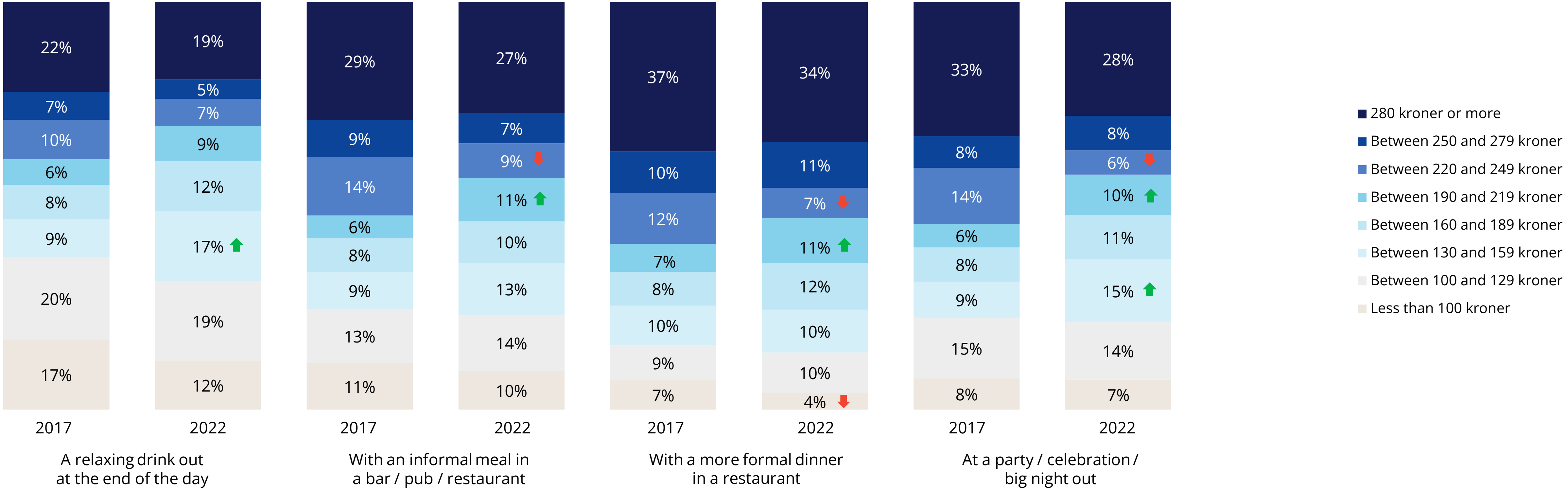
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# On-trade spend

## There has been an increase in spend levels at prices between 190 and 219 kroner; there is less of a movement towards premium price points in the on-trade, where wine is already more expensive

### On-trade: Wine spend per bottle by occasion

Base = Those who buy wine in the on-trade




↑/↓: Statistically significantly higher / lower than May '17 at a 95% confidence level

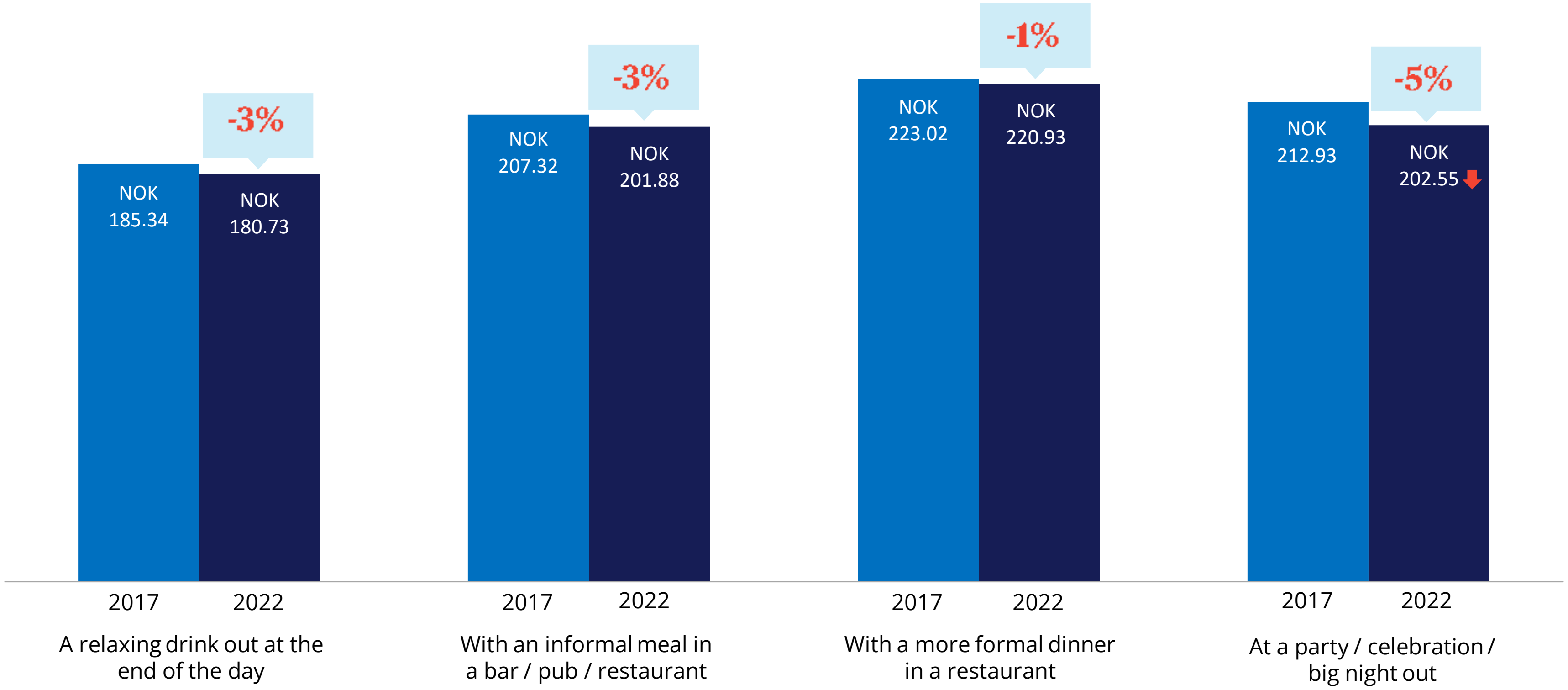
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# On-trade spend

## Average spend is down by a similar proportion across all occasions, with a significant decrease in parties, celebrations and big nights out, which could be due to the higher cost of living

### On-trade: Typical spend by occasion

Base = Those who buy wine in the on-trade




Q: What do market experts say?

"You see the crowds outside the bars on Fridays and Saturdays. People stand in line for up to two hours to go out drinking, but people are starting to notice the inflation and the price increases, so you see that more and more people are doing a pre-game drink at home instead of actually spending as much when they're out at bars and clubs."

*Wine importer, Norway*

↑/↓: Statistically significantly higher / lower than May '17 at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '22 (n≥504) Norwegian regular wine drinkers

# Wine Views and Attitudes

## Norway Wine Landscapes

2022

# Wine views and attitudes

## Key takeaways

### 1. Millennials are more likely to experiment with new styles of wine

Nearly half of all regular wine drinkers in Norway enjoy trying new and different styles of wine on a regular basis, though this is significantly more likely among Millennials and less likely with older consumers, such as Boomers, who tend to prefer stick to the wines they know.

### 2. Drinkers look for the best wines they can get for their budget

Regular wine drinkers in Norway are purchasing wines at premium price points more frequently than in previous years, but a significantly higher proportion consider wine to be an expensive drink and look for the best wines they can get within their budget, suggesting that they are comfortable spending at higher price points.

### 3. The importance of alcohol content has been increasing steadily

Wine that matches or complements food is the number one choice cue in the Norwegian market, but the importance of alcohol content has increased significantly from both 2017 and 2018. In 2022, nearly two in five Norwegian regular wine drinkers considered alcohol content to be either important or very important when buying wine.

# Attitudes towards wine

Nearly half of all regular wine drinkers in Norway enjoy trying new and different styles of wine on a regular basis, though this is significantly more likely among Millennials and less likely with older consumers, such as Boomers, who tend to prefer stick to the wines they know

Q: What do market experts say?

"Younger people are spending more money on a bottle of wine. By young people, I mean from 20 to 35."

*Wine journalist, Norway*

## Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Norwegian regular wine drinkers (n≥504)

| | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|
| I enjoy trying new and different styles of wine on a regular basis | 46% | 47% | 44% | ➡ | ➡ |
| I don't mind what I buy so long as the price is right | 20% | 20% | 20% | ➡ | ➡ |
| I know what I like and I tend to stick to what I know | 34% | 32% | 36% | ➡ | ➡ |

## Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Norwegian regular wine drinkers (n=504)

| | All Norwegian Regular Wine Drinkers (n=504) | 18-24 Gen Z (n=38) | 25-39 Millennials (n=123) | 40-54 Gen X (n=117) | 55+ Boomers (n=226) |
|---|---|---|---|---|---|
| I enjoy trying new and different styles of wine on a regular basis | 44% | 55% | 66% | 49% | 28% |
| I don't mind what I buy so long as the price is right | 20% | 27% | 19% | 21% | 18% |
| I know what I like and I tend to stick to what I know | 36% | 18% | 15% | 30% | 53% |

Grey shading: low sample size (n<50)
⬆/⬇: 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® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Wine involvement

## The involvement of regular wine drinkers has remained relatively unchanged, reinforcing the idea that the pandemic has not had much of an effect on consumer behaviour

### Wine involvement: Tracking

Base = All Norwegian regular wine drinkers (n≥504)

| | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|
| High involvement | 33% | 32% | 33% | ➡ | ➡ |
| Medium involvement | 38% | 35% | 37% | ➡ | ➡ |
| Low involvement | 29% | 32% | 30% | ➡ | ➡ |

### Wine involvement by generation

Base = All Norwegian regular wine drinkers (n=504)

| | All Norwegian Regular Wine Drinkers (n=504) | 18-24 Gen Z (n=38) | 25-39 Millennials (n=123) | 40-54 Gen X (n=117) | 55+ Boomers (n=226) |
|---|---|---|---|---|---|
| High involvement | 33% | 29% | 41% | 35% | 29% |
| Medium involvement | 37% | 46% | 34% | 38% | 36% |
| Low involvement | 30% | 25% | 25% | 27% | 35% |

Grey shading: low sample size (n<50)
⬆/⬇: 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® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Involvement and perceived expertise (1)

## Wine drinkers in Norway are purchasing wines at premium price points more frequently than in previous years but a significantly higher proportion consider wine to be expensive and look for the best wines within their budget

### Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Norwegian regular wine drinkers (n≥504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Drinking wine gives me pleasure | 67% | 64% | 65% | → | → |
| 2= | Generally speaking, wine is an expensive drink | 42% | 49% | 51% | ↑ | → |
| 2= | I like to take my time when I purchase a bottle of wine | 49% | 48% | 51% | → | → |
| 4= | I always look for the best quality wines I can get for my budget | 51% | 45% | 50% | → | ↑ |
| 4= | Deciding which wine to buy is an important decision | 48% | 47% | 50% | → | → |
| 6 | I don't understand much about wine | 33% | 30% | 36% | → | ↑ |
| 7= | I have a strong interest in wine | 34% | 33% | 34% | → | → |
| 7= | Wine is important to me in my lifestyle | 32% | 34% | 34% | → | → |
| 7= | Compared to others, I know less about the subject of wine | 37% | 32% | 34% | → | → |
| 10 | Generally speaking, wine is reasonably priced | 29% | 26% | 29% | → | → |
| 11 | I feel competent about my knowledge of wine | 16% | 22% | 23% | ↑ | → |

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Involvement and perceived expertise (2)

## A large proportion of Millennials think they know less about the subject of wine than most people, while Boomers are more confident about their expertise

### Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | All Norwegian Regular Wine Drinkers (n=504) | 18-24 Gen Z (n=38) | 25-39 Millennials (n=123) | 40-54 Gen X (n=117) | 55+ Boomers (n=226) |
|---|---|---|---|---|---|---|
| 1 | Drinking wine gives me pleasure | 65% | 70% | 74% | 73% | 56% |
| 2= | Generally speaking, wine is an expensive drink | 51% | 39% | 44% | 55% | 55% |
| 2= | I like to take my time when I purchase a bottle of wine | 51% | 58% | 60% | 50% | 45% |
| 4= | I always look for the best quality wines I can get for my budget | 50% | 61% | 56% | 57% | 42% |
| 4= | Deciding which wine to buy is an important decision | 50% | 58% | 53% | 51% | 47% |
| 6 | I don't understand much about wine | 36% | 48% | 42% | 31% | 33% |
| 7= | I have a strong interest in wine | 34% | 26% | 39% | 33% | 33% |
| 7= | Wine is important to me in my lifestyle | 34% | 32% | 42% | 36% | 28% |
| 7= | Compared to others, I know less about the subject of wine | 34% | 42% | 44% | 34% | 26% |
| 10 | Generally speaking, wine is reasonably priced | 29% | 39% | 39% | 26% | 23% |
| 11 | I feel competent about my knowledge of wine | 23% | 26% | 28% | 25% | 19% |

= Represents equal ranking
Grey shading: low sample size (n<50)
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Wine knowledge and confidence indices

## Knowledge and confidence have remained relatively unchanged since 2017 and 2018, indicating that the pandemic had little or no effect

### Wine knowledge index: Tracking

Base = All Norwegian regular wine drinkers (n≥504)

| | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|
| Knowledge Index | **38.7** | **39.0** | **40.5** | ➡ | ➡ |

**+1.7** 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 Norwegian regular wine drinkers (n≥504)

| | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|
| Confidence Index | **43.1** | **45.8** | **44.5** | ➡ | ➡ |

**+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.

Q: What do market experts say?

"Consumer sentiment is pretty resilient, given the disruption of the pandemic."

*Market analyst, Norway*

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

Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Wine-drinking motivations

## Food pairing is less prominent among Millennials, who are more likely to agree that wine makes them feel sophisticated, individual and unique

### Wine drinking motivations: Top 15

% who selected the following as reasons why they drink wine
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | All Norwegian Regular Wine Drinkers (n=504) | 18-24 Gen Z (n=38) | 25-39 Millennials (n=123) | 40-54 Gen X (n=117) | 55+ Boomers (n=226) |
|---|---|---|---|---|---|---|
| 1 | Wine enhances food and meals | 64% | 45% | 54% | 70% | 69% |
| 2 | To celebrate special occasions | 60% | 61% | 50% | 63% | 65% |
| 3 | Wine helps create a warm / friendly atmosphere | 53% | 48% | 48% | 50% | 58% |
| 4 | Drinking wine makes me feel relaxed | 47% | 41% | 48% | 56% | 42% |
| 5 | Wine is about sharing with a partner / close friend or family member | 46% | 47% | 37% | 50% | 48% |
| 6= | I really love the taste of wine | 41% | 38% | 35% | 47% | 42% |
| 6= | Wine is about sharing something with others | 41% | 42% | 40% | 44% | 39% |
| 8 | Most of my friends drink wine | 31% | 51% | 26% | 31% | 31% |
| 9 | I like shopping / choosing wines to drink | 27% | 33% | 25% | 30% | 25% |
| 10 | I like learning about new wines | 24% | 13% | 32% | 27% | 20% |
| 11 | Wine is a refreshing drink | 23% | 29% | 19% | 29% | 20% |
| 12 | I treat myself with wine at the end of the day | 19% | 26% | 22% | 25% | 13% |
| 13 | Drinking wine can be good for my health | 16% | 19% | 8% | 16% | 20% |
| 14= | It makes people sophisticated | 7% | 18% | 12% | 7% | 2% |
| 14= | Wine is a fashionable drink | 7% | 6% | 11% | 4% | 6% |
| 16 | It makes me feel individual and unique | 6% | 10% | 14% | 2% | 3% |

= Represents equal ranking
Grey shading: low sample size (n<50)
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Wine-buying choice cues

## Several choice cues have increased significantly since either 2017 or 2018; wine that matches or complements food is the number -one choice cue in the Norwegian market; the importance of alcohol content has increased

### Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Norwegian regular wine drinkers (n≥504)

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Wine that matches or complements food | 75% | 76% | 76% | → | → |
| 2 | Taste or wine style descriptions displayed on the shelves or on wine labels | 65% | 60% | 68% | → | ↑ |
| 3 | A brand I am aware of | 60% | 65% | 66% | ↑ | → |
| 4 | Recommendation by friend or family | 58% | 61% | 61% | → | → |
| 5 | Recommendations from shop staff or shop leaflets | 60% | 59% | 57% | → | → |
| 6 | The country of origin | 48% | 47% | 52% | → | → |
| 7 | Grape variety | 42% | 48% | 50% | ↑ | → |
| 8 | The region of origin | 35% | 37% | 38% | → | → |
| 9 | Alcohol content | 24% | 27% | 34% | ↑ | ↑ |
| 10 | Recommendation by wine critic or writer | 27% | 29% | 31% | → | → |
| 11 | Appeal of the bottle and / or label design | 19% | 16% | 21% | → | ↑ |
| 12 | Recommendation by wine guide books | 20% | 20% | 16% | → | → |
| 13 | Whether or not the wine has won a medal or award | 12% | 12% | 13% | → | → |

Q: What do market experts say?

"The ones that buy a lot of wine, they like lower alcohol, and I think that people are more and more conscious about the alcohol level in wine."

*Wine journalist, Norway*

"Because we have very high alcohol taxes in Norway, and considering the purchase power of the consumer, when you lower the alcohol content, the price will stay as it is, or maybe even go lower, and that will keep the customer."

*Wine importer, Norway*

→ = Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Hot Topic: Wine Packaging and Closures

**Norway Wine Landscapes**

2022

# Wine packaging and closures

## Key takeaways

### 1. Around half of RWDs have bought large bag-in-box in the past six months

The standard glass bottle format dominates the market in terms of awareness and consumption, with large bag-in-box in second place, though both are far ahead of all other types of packaging in consumption terms.

### 2. Wine closure preference remains the same since 2017

Screw-caps and natural cork are favourite closure among Norwegian regular wine drinkers, with preferences for closures broadly remaining the same since 2017.

HOT TOPIC

# Packaging type consumption and awareness

## The standard glass bottle format dominates the market in terms of awareness and consumption levels, with large bag-in-box in second place. Both are far ahead of all other types of packaging in consumption terms

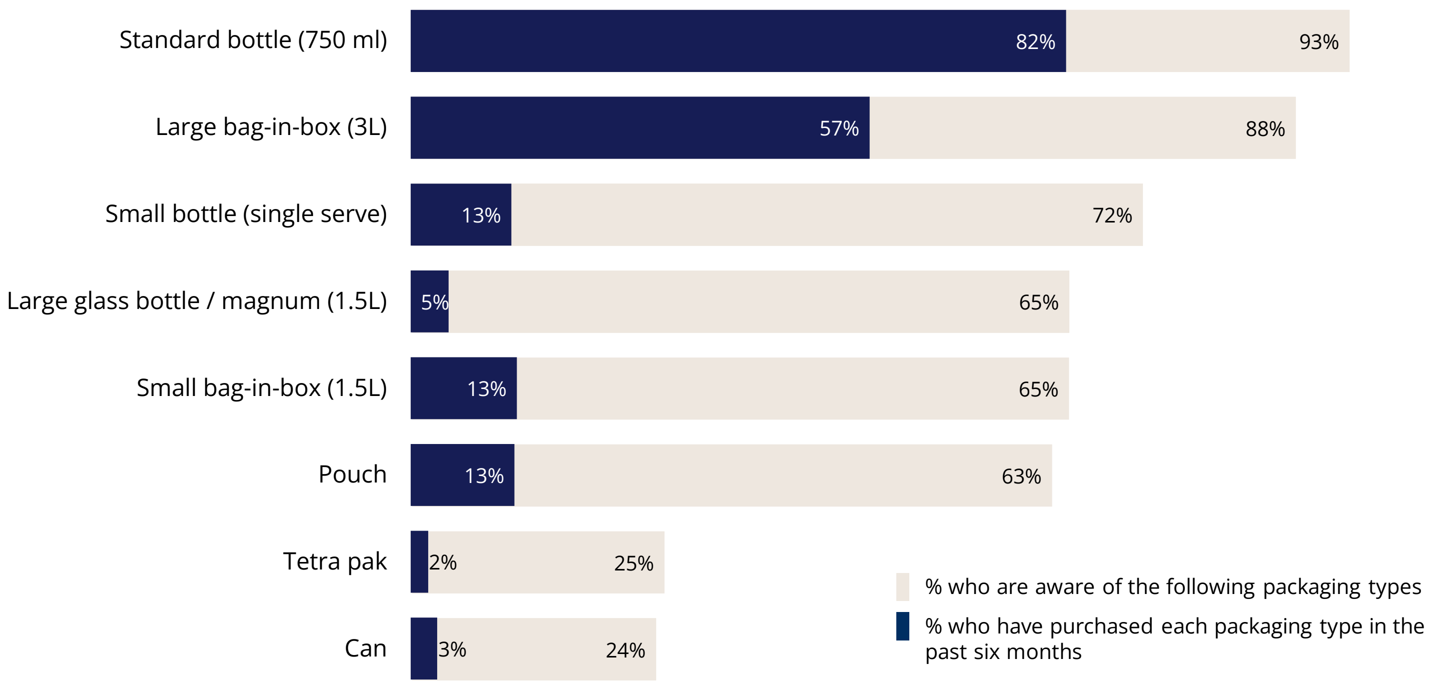
Q: What do market experts say?

"Packaging is a big trend. In 2020, bag-in-box went crazy. But since 2021, we saw a slight decrease in bag-in-box. I think that's because people weren't necessarily needing to buy in bulk quite as much as they were doing. So we're seeing a bit of a readjustment."

*Market analyst, Norway*

**Packaging types: Awareness and consumption levels**

% of those who are aware of or have purchased wine in the following packaging types
Base = All Norwegian regular wine drinkers (n=504)




Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

HOT TOPIC

# Packaging purchase and conversion

While there have been significantly lower purchase incidences of large bag-in-box amongst Millennials, Boomers are purchasing that packaging type significantly more than other generations of Norwegian regular wine drinkers. Conversion rate trends mimic those of purchase incidences, with Millennials more likely to purchase standard bottles and Boomers large bag-in-box

## Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | All Norwegian Regular Wine Drinkers (n=504) | 18-24 Gen Z (n=38) | 25-39 Millennials (n=123) | 40-54 Gen X (n=117) | 55+ Boomers (n=226) |
|---|---|---|---|---|---|---|
| 1 | Standard bottle (750 ml) | 82% | 68% | 89% | 82% | 80% |
| 2 | Large bag-in-box (3L) | 57% | 42% | 39% | 57% | 70% |
| 3= | Small bag-in-box (1.5L) | 13% | 20% | 19% | 11% | 10% |
| 3= | Pouch | 13% | 16% | 11% | 14% | 13% |
| 3= | Small bottle (single serve) | 13% | 25% | 11% | 16% | 10% |
| 6 | Large glass bottle / magnum (1.5L) | 5% | 19% | 5% | 4% | 3% |
| 7 | Can | 3% | 10% | 6% | 3% | 1% |
| 8 | Tetra pak | 2% | 3% | 3% | 2% | 1% |

## Packaging conversion: by generation

% who are aware of and have purchased wine in the following packaging types
Base = All Norwegian regular wine drinkers (n=504)

| Ranking '22 | | All Norwegian Regular Wine Drinkers (n=504) | 18-24 Gen Z (n=38) | 25-39 Millennials (n=123) | 40-54 Gen X (n=117) | 55+ Boomers (n=226) |
|---|---|---|---|---|---|---|
| 1 | Standard bottle (750 ml) | 88% | 84% | 95% | 87% | 86% |
| 2 | Large bag-in-box (3L) | 65% | 59% | 48% | 63% | 76% |
| 3= | Pouch | 20% | 23% | 16% | 23% | 21% |
| 3= | Small bag-in-box (1.5L) | 20% | 32% | 29% | 18% | 15% |
| 5 | Small bottle (single serve) | 17% | 37% | 16% | 19% | 14% |
| 6 | Can | 14% | 30% | 16% | 15% | 5% |
| 7 | Tetra pak | 9% | 16% | 16% | 10% | 5% |
| 8 | Large glass bottle / magnum (1.5L) | 7% | 31% | 7% | 6% | 4% |

= Represents equal ranking
Grey shading: low sample size (n<50)
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

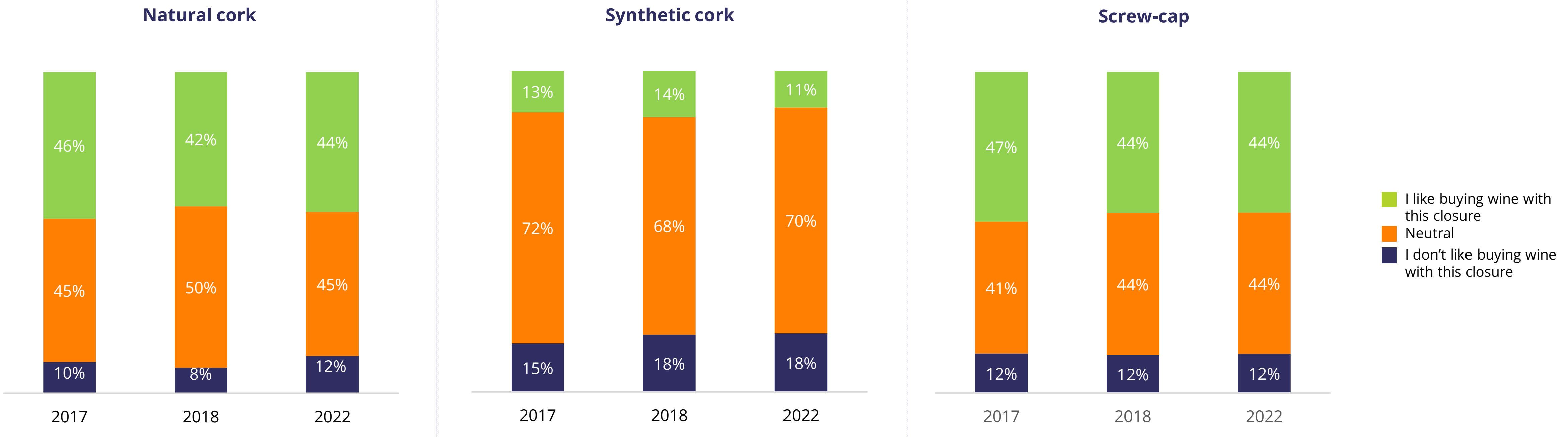
HOT TOPIC

# Wine closure preferences

## Screw-caps and natural cork are a favourite closure among Norwegian regular wine drinkers, with preferences for closures broadly remaining the same since 2017

### Wine closure preferences

% who hold the following view of each wine closure type
Base = All Norwegian regular wine drinkers (n≥504)




⬆ / ⬇: Statistically significantly higher / lower than the 2017 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

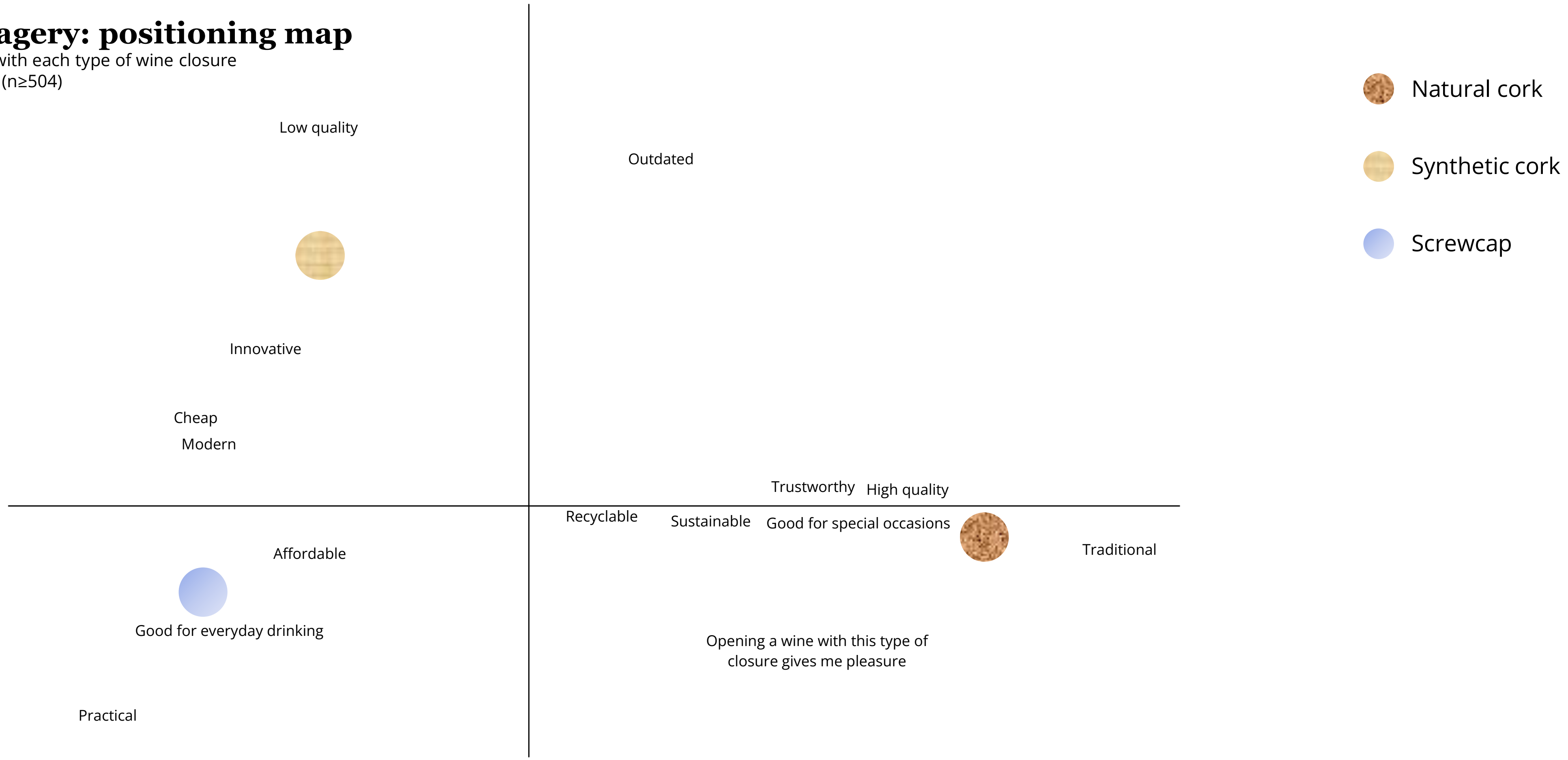
HOT TOPIC

# Views on wine closure types

## Screw-cap has positive associations for its practicality and ease of use for everyday drinking

### Wine closure types imagery: positioning map

% who associate the following statements with each type of wine closure
Base = All Norwegian regular wine drinkers (n≥504)




Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Hot Topic: Consumer Sentiment

## Norway Wine Landscapes

2022

# Consumer sentiment

Key takeaways

## 1. Norwegian wine drinkers are happy, but split about the near future

Norwegian regular wine drinkers are confident with their personal finances and are happy at the moment, but are split over whether their household will be in a better place in a year's time and are overwhelmingly saying they are spending less when they go out.

## 2. Lower levels of wine spend and quantity

Although they feel confident about their financial situations and are feeling happy, Norwegian regular wine drinkers are going out less and buying less and cheaper wine.

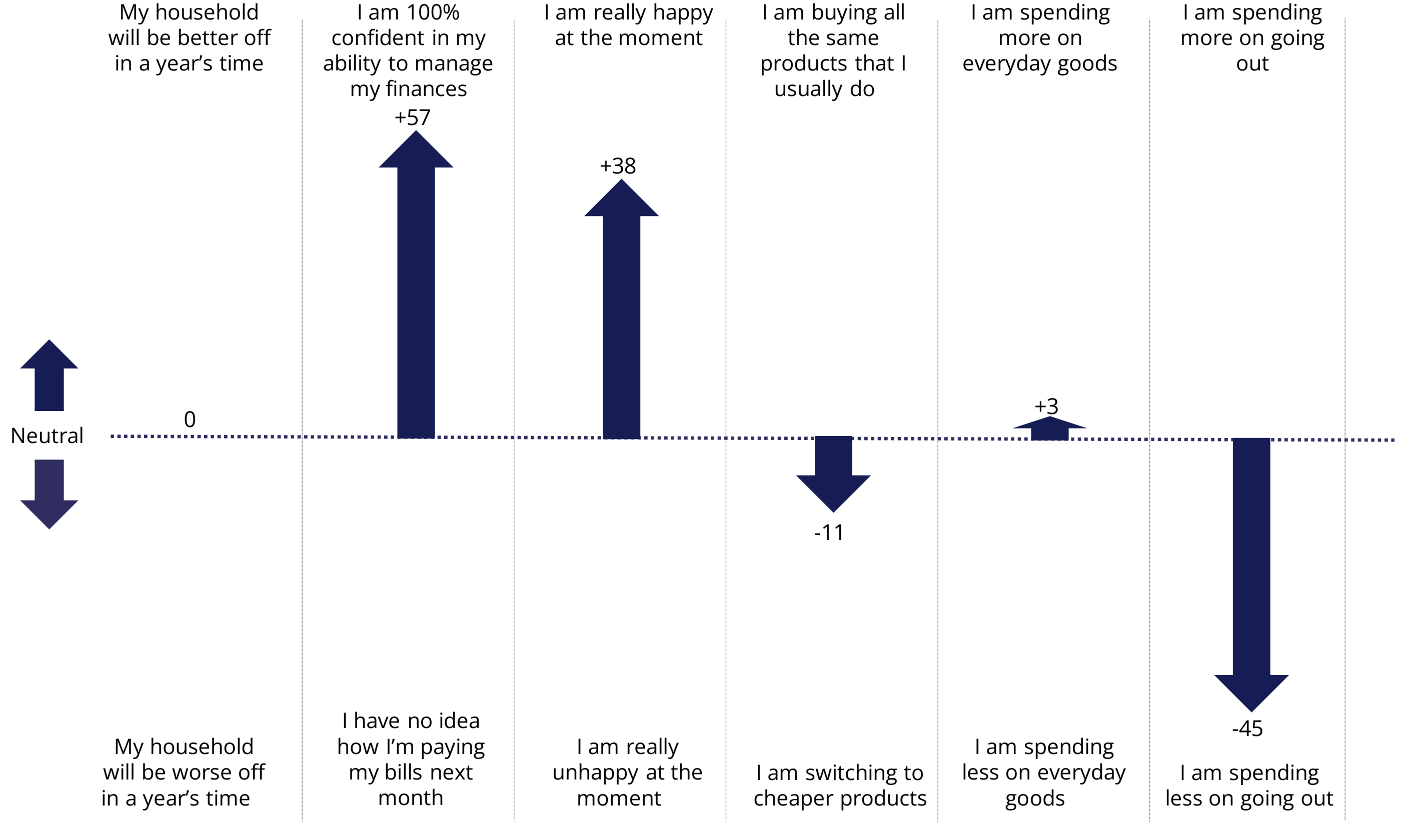
HOT TOPIC

# Consumer sentiment

## Norwegian regular wine drinkers are confident about personal finances and happy, but are split over whether they will be in a better place in a year's time and overwhelmingly say they are spending less when they go out

### Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Norwegian regular wine drinkers (n=504)




### Demographic insights

- Gen X are the least confident generational grouping in the Norwegian market with a significantly higher proportion of them saying they where unhappy with their current situation and are unsure how they would pay their bills next month.
- Millennials seem optimistic, with around half of them saying they believe their household will be better off in a year's time.

Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

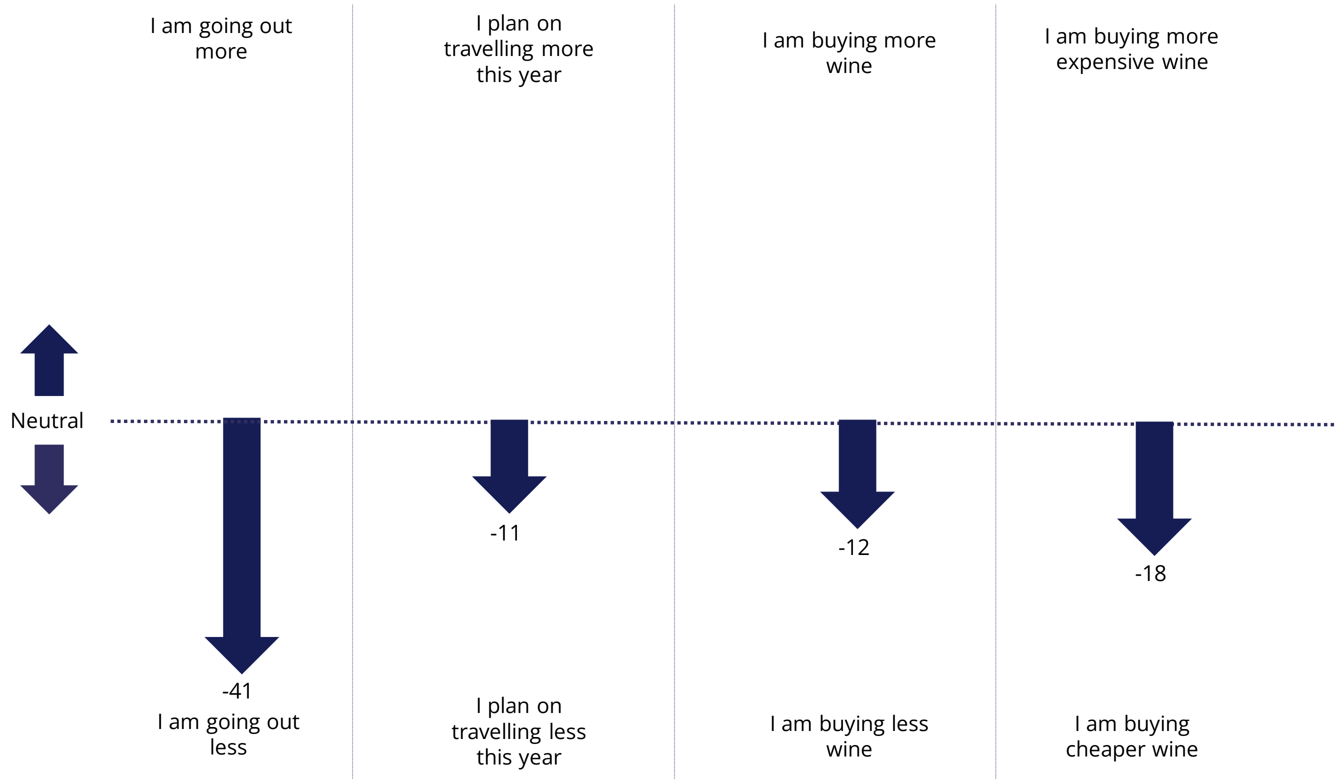
HOT TOPIC

# Consumer sentiment

## Although they feel happy and are confident about their financial situation, Norwegian wine drinkers are going out less and buying less and cheaper wine

### Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
Base = All Norwegian regular wine drinkers (n=504)




### Demographic insights

- Significantly more women say they are going out less, planning on travelling less and buying cheaper wine, compared to all regular wine drinkers.
- Millennial wine drinkers more frequently said they were going out more, planning on travelling more and buying more expensive wine, compared to all regular wine drinkers

Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Brand Health

## Norway Wine Landscapes

2022

# Brand Health

## Key takeaways

### 1. Two of Chile's big brands are in the top three in Norway

The three most powerful brands in the Norwegian market are Casillero del Diablo, Tommasi and Gato Negro. Chilean brands Gato Negro and Casillero del Diablo are the two most well-known, with three in 4 Norwegians aware of them. The trio also have the highest purchase levels.

### 2. Tommasi and Meinklang are top for consideration and affinity

The key metrics of consideration, affinity and recommendation are dominated by Meinklang and Tommasi, with roughly half of Norwegian regular wine drinkers who have heard of them, saying they are right for them, would consider purchasing them and would recommend them to a friend.

# Global Wine Brand Power Index

## Brand health measures included in the index

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

**Wine Brand Power Index**

# Norwegian brand power

## Key takeaways

Casillero del Diablo

1st

TOMMASI
Viticoltori dal 1902

2nd

GatoNegro

3rd

# Norwegian brand power

## The top three wine brands among Norwegian regular wine drinkers are Casillero del Diablo, Tommasi and Gato Negro

| Ranking '22 | | Awareness Index | Purchase Index | Connection Index | Final Index |
|---|---|---|---|---|---|
| 1 | Casillero del Diablo | 99 | 87 | 72 | **86.8** |
| 2 | Tommasi | 62 | 94 | 100 | **84.7** |
| 3 | Gato Negro | 100 | 66 | 53 | **73.9** |
| 4 | Lindeman's | 77 | 66 | 70 | **71.2** |
| 5 | Torres | 90 | 61 | 57 | **70.1** |
| 6 | Faustino | 74 | 58 | 76 | **69.1** |
| 7 | Jacob's Creek | 83 | 57 | 66 | **68.7** |
| 8 | Falling Feather | 51 | 74 | 82 | **68.0** |
| 9 | J.P. Chenet | 83 | 60 | 57 | **67.3** |
| 10 | Campo Viejo | 65 | 62 | 64 | **63.8** |
| 11 | Chill Out | 50 | 66 | 72 | **62.0** |
| 12 | Doppio Passo | 42 | 62 | 82 | **61.1** |
| 13 | Meinklang | 16 | 65 | 95 | **56.9** |
| 14 | Escada Touriga Nacional | 39 | 66 | 66 | **56.5** |
| 15 | Yellow Tail | 40 | 51 | 71 | **53.2** |

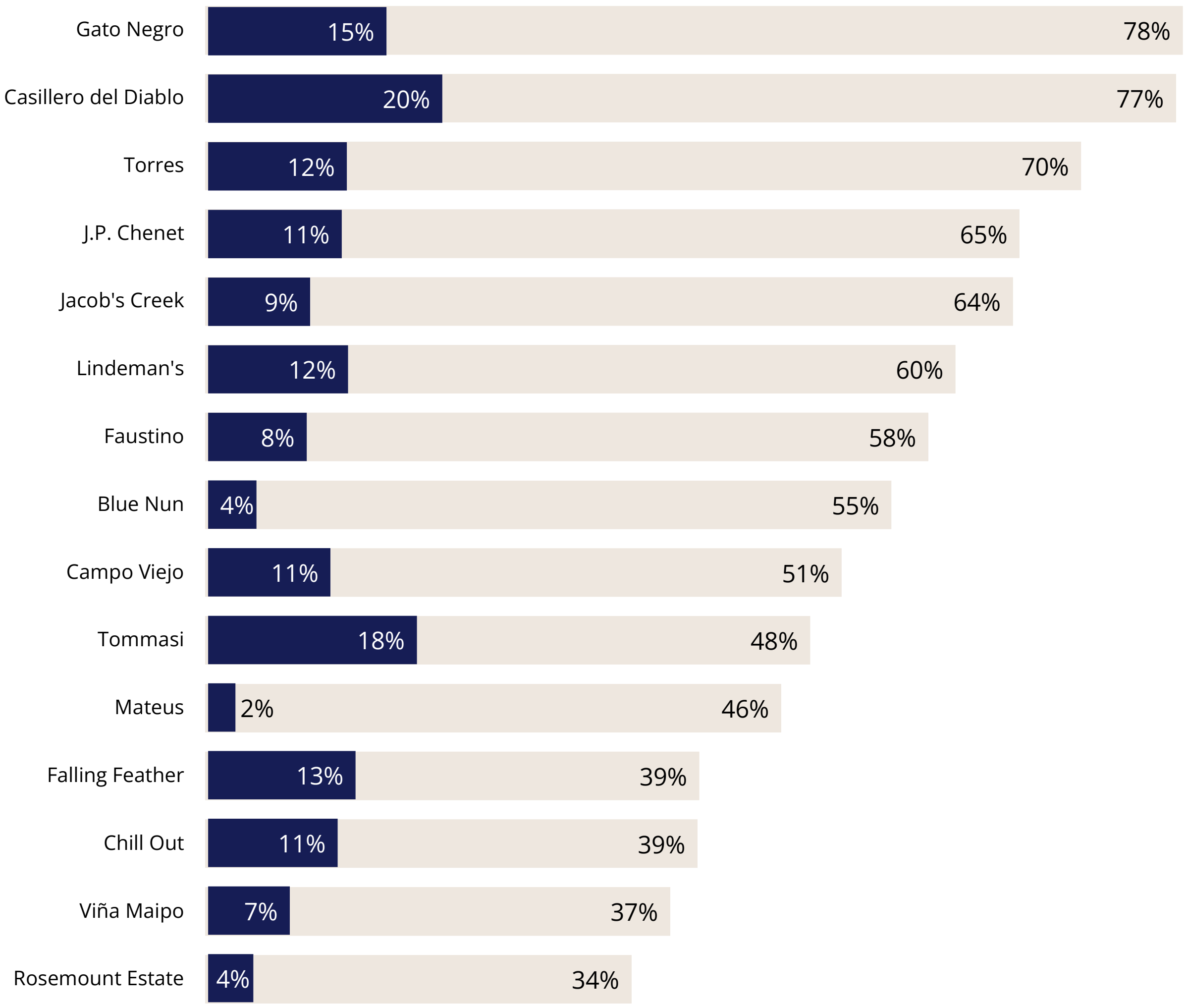
Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Brand health: Consumption and awareness

## Chilean brands Gato Negro and Casillero del Diablo top the charts for awareness levels, with just over three in four Norwegian regular wine drinkers are aware of them. Casillero del Diablo and Tommasi have the highest consumption incidences, with nearly one in five consuming the two brands in the past three months

### Brand health: Top 15 awareness and consumption levels

Base = All Norwegian regular wine drinkers (n=504)




Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Brand awareness

## There have been few variations in purchase levels through the period, though there are significant decreases for J. P. Chenet, Jacob's Creek and Blue Nun within the top 15

### Awareness: Tracking

% who have hard of the following brands
Base = All Norwegian regular wine drinkers (n≥504)

Results for all 46 brands available in the data table

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Gato Negro | 77% | 74% | 78% | → | → |
| 2 | Casillero del Diablo | 78% | 76% | 77% | → | → |
| 3 | Torres | 73% | 71% | 70% | → | → |
| 4 | J.P. Chenet | 72% | 68% | 65% | ↓ | → |
| 5 | Jacob's Creek | 70% | 67% | 64% | ↓ | → |
| 6 | Lindeman's | 57% | 60% | 60% | → | → |
| 7 | Faustino | 61% | 61% | 58% | → | → |
| 8 | Blue Nun | 66% | 58% | 55% | ↓ | → |
| 9 | Campo Viejo | 48% | 49% | 51% | → | → |
| 10 | Tommasi | n/a | n/a | 48% | n/a | n/a |
| 11 | Mateus | 46% | 48% | 46% | → | → |
| 12= | Falling Feather | n/a | n/a | 39% | n/a | n/a |
| 12= | Chill Out | n/a | n/a | 39% | n/a | n/a |
| 14 | Viña Maipo | 34% | 36% | 37% | → | → |
| 15 | Rosemount Estate | 35% | 36% | 34% | → | → |

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 16 | Doppio Passo | n/a | n/a | 33% | n/a | n/a |
| 17= | Yellow Tail | n/a | n/a | 31% | n/a | n/a |
| 17= | Escada Touriga Nacional | n/a | n/a | 31% | n/a | n/a |
| 19 | Chapel Hill | n/a | n/a | 27% | n/a | n/a |
| 20 | Moselland | 28% | 23% | 23% | → | → |
| 21= | Marqués de Chivé | 22% | 23% | 22% | → | → |
| 21= | Marqués de Nombrevilla | n/a | n/a | 22% | n/a | n/a |
| 23= | El Copero | n/a | n/a | 20% | n/a | n/a |
| 23= | Concha y Toro | 22% | 23% | 20% | → | → |
| 25= | Mouton Cadet | 19% | 23% | 18% | → | ↓ |
| 25= | Tariquet | 20% | 22% | 18% | → | → |
| 27= | Sunrise | 22% | 24% | 17% | → | ↓ |
| 27= | Ruby Zin | n/a | n/a | 17% | n/a | n/a |
| 27= | Santa Carolina | n/a | 15% | 17% | n/a | → |
| 27= | Gallo Family Vineyards | 13% | 15% | 17% | → | → |

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Brand purchase

## Many brands’ purchase incidences have either remained stable or decreased, but Campo Viejo and Gallo Family Vineyards have experienced an increase in purchase levels

### Purchase: Tracking

% who have bought the following brands in the past three months
Base = All Norwegian regular wine drinkers (n≥504)

Results for all 46 brands available in the data table

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Casillero del Diablo | 23% | 24% | 20% | → | → |
| 2 | Tommasi | n/a | n/a | 18% | n/a | n/a |
| 3 | Gato Negro | 18% | 18% | 15% | → | → |
| 4 | Falling Feather | n/a | n/a | 13% | n/a | n/a |
| 5= | Lindeman's | 12% | 18% | 12% | → | ↓ |
| 5= | Torres | 14% | 18% | 12% | → | ↓ |
| 7= | J.P. Chenet | 19% | 18% | 11% | ↓ | ↓ |
| 7= | Chill Out | n/a | n/a | 11% | n/a | n/a |
| 7= | Campo Viejo | 6% | 11% | 11% | ↑ | → |
| 10= | Escada Touriga Nacional | n/a | n/a | 9% | n/a | n/a |
| 10= | Jacob's Creek | 18% | 18% | 9% | ↓ | ↓ |
| 12= | Faustino | 10% | 10% | 8% | → | → |
| 12= | Doppio Passo | n/a | n/a | 8% | n/a | n/a |
| 14 | Viña Maipo | 6% | 6% | 7% | → | → |
| 15 | Yellow Tail | n/a | n/a | 6% | n/a | n/a |
| 16= | Dr. Loosen | n/a | n/a | 5% | n/a | n/a |
| 16= | Ruby Zin | n/a | n/a | 5% | n/a | n/a |
| 18= | Meinklang | n/a | n/a | 4% | n/a | n/a |
| 18= | Marqués de Nombrevilla | n/a | n/a | 4% | n/a | n/a |
| 18= | Blue Nun | 6% | 7% | 4% | → | ↓ |
| 18= | Chapel Hill | n/a | n/a | 4% | n/a | n/a |
| 18= | Moselland | 5% | 4% | 4% | → | → |
| 18= | Gallo Family Vineyards | 1% | 2% | 4% | ↑ | ↑ |
| 18= | Rosemount Estate | 5% | 6% | 4% | → | → |
| 25= | Domaine Montrose | n/a | n/a | 3% | n/a | n/a |
| 25= | Les Fumées Blanches | 2% | 4% | 3% | → | → |
| 25= | Concha y Toro | 3% | 3% | 3% | → | → |
| 25= | Cono Sur | 3% | 2% | 3% | → | → |
| 25= | Santa Carolina | n/a | 2% | 3% | n/a | → |
| 30 | Marqués de Chivé | 4% | 5% | 2% | → | ↓ |

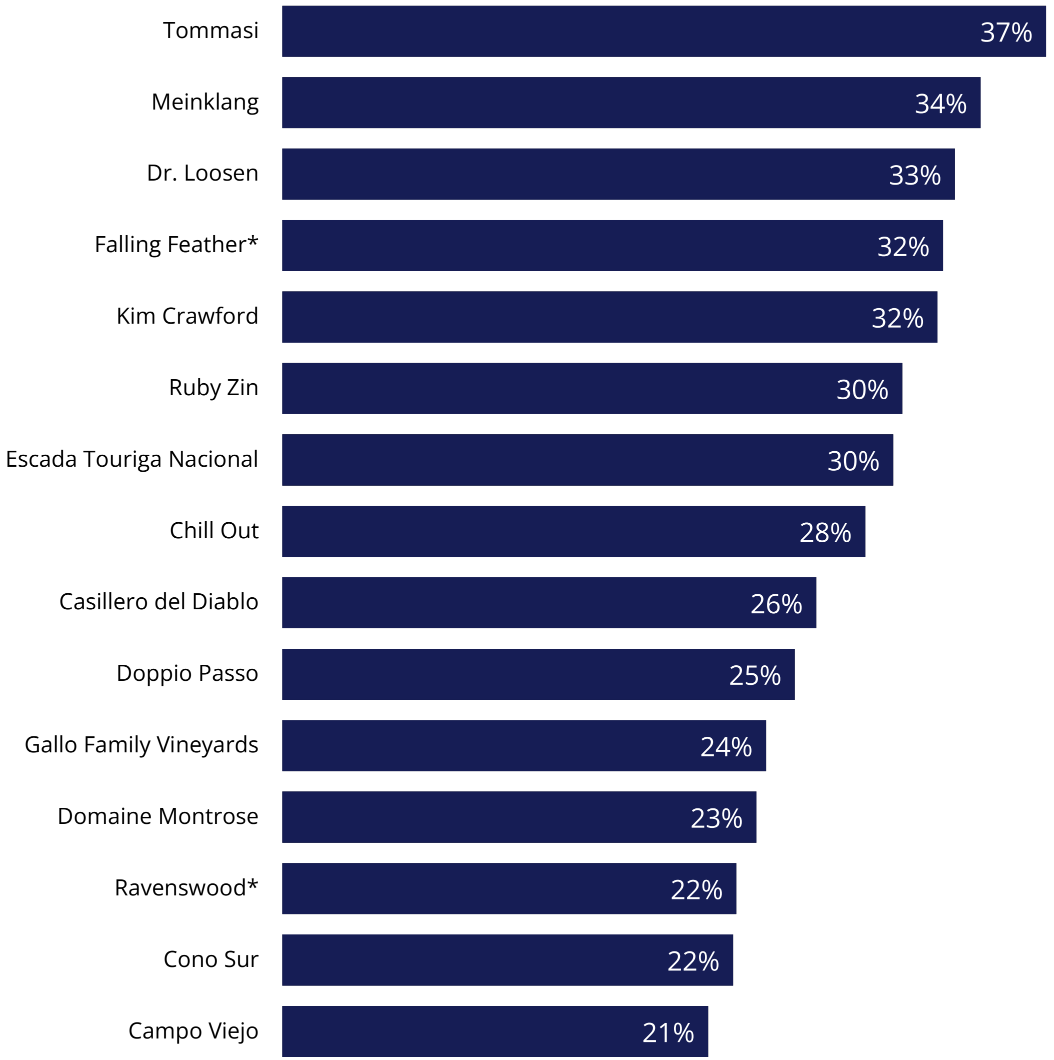
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May ’17, Jul ’18, Jul ’22 (n≥504) Norwegian regular wine drinkers

# Brand conversion

Conversion incidences are relatively similar across the top 15. Tommasi is ranked as the second most consumed brand in the past three months by regular wine drinkers in Norway and has the highest conversion to purchase incidence

## Conversion: Top 15

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




* Low sample size (n<50)

Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Brand conversion: Tracking

## Following the trends in purchase levels, Gallo Family Vineyards and Campo Viejo are the only brands in the top 30 to experience increases in conversion levels

### Conversion: Tracking

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

Results for all 46 brands available in the data table

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Tommasi | n/a | n/a | 37% | n/a | n/a |
| 2 | Meinklang | n/a | n/a | 34% | n/a | n/a |
| 3 | Dr. Loosen | n/a | n/a | 33% | n/a | n/a |
| 4= | Falling Feather | n/a | n/a | 32% | n/a | n/a |
| 4= | Kim Crawford | 27% | 19% | 32% | → | → |
| 6= | Ruby Zin | n/a | n/a | 30% | n/a | n/a |
| 6= | Escada Touriga Nacional | n/a | n/a | 30% | n/a | n/a |
| 8 | Chill Out | n/a | n/a | 28% | n/a | n/a |
| 9 | Casillero del Diablo | 29% | 32% | 26% | → | ↓ |
| 10 | Doppio Passo | n/a | n/a | 25% | n/a | n/a |
| 11 | Gallo Family Vineyards | 7% | 11% | 24% | ↑ | ↑ |
| 12 | Domaine Montrose | n/a | n/a | 23% | n/a | n/a |
| 13= | Ravenswood | 16% | 21% | 22% | → | → |
| 13= | Cono Sur | 32% | 26% | 22% | → | → |
| 15 | Campo Viejo | 14% | 22% | 21% | ↑ | → |

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 16= | Wakefield | 0% | 15% | 20% | → | → |
| 16= | Lindeman's | 21% | 30% | 20% | → | ↓ |
| 16= | Gato Negro | 24% | 25% | 20% | → | → |
| 16= | Marqués de Nombrevilla | n/a | n/a | 20% | n/a | n/a |
| 20= | Les Fumées Blanches | 18% | 27% | 19% | → | → |
| 20= | Viña Maipo | 19% | 17% | 19% | → | → |
| 22= | Yellow Tail | n/a | n/a | 18% | n/a | n/a |
| 22= | J.P. Chenet | 26% | 27% | 18% | ↓ | ↓ |
| 24= | Mosselland | 19% | 19% | 17% | → | → |
| 24= | Torres | 19% | 25% | 17% | → | ↓ |
| 26= | Chapel Hill | n/a | n/a | 15% | n/a | n/a |
| 26= | Santa Carolina | n/a | 14% | 15% | n/a | → |
| 26= | Fetzer | 12% | 15% | 15% | → | → |
| 26= | Faustino | 16% | 16% | 15% | → | → |
| 30 | Jacob's Creek | 25% | 27% | 14% | ↓ | ↓ |

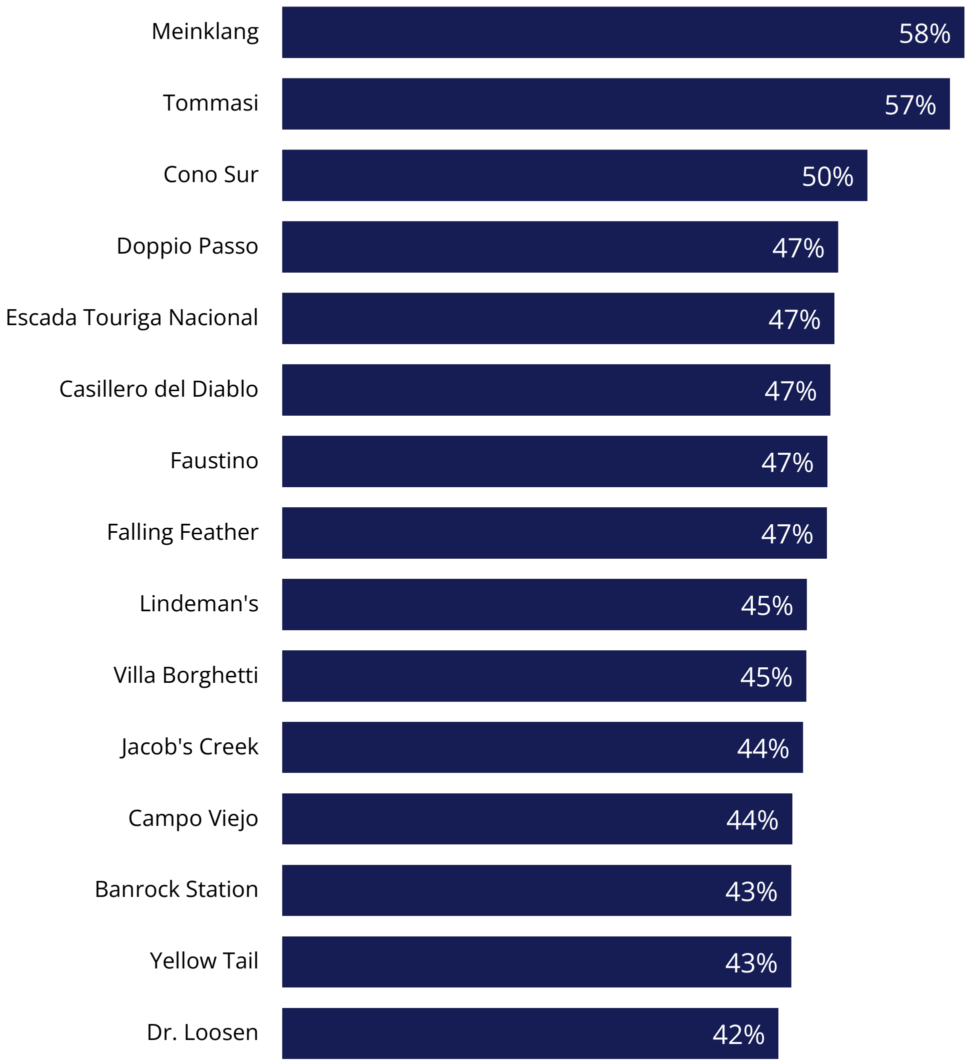
n/a = tracking unavailable for this wave
= Represents equal ranking ; grey shading: low sample size (n<50)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Brand consideration

## The gaps are narrow for consideration between the top two, Meinklang and Tommasi. Over half of Norwegian regular wine drinkers who have heard of the two brands, would consider purchasing them

**Consideration: Top 15**

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




Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Brand consideration: Tracking

## Most brands are relatively unchanged, with the exception of a decrease for Torres since 2018 and an increase for Tariquet since 2017

### Consideration: Tracking

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

Results for all 46 brands available in the data table

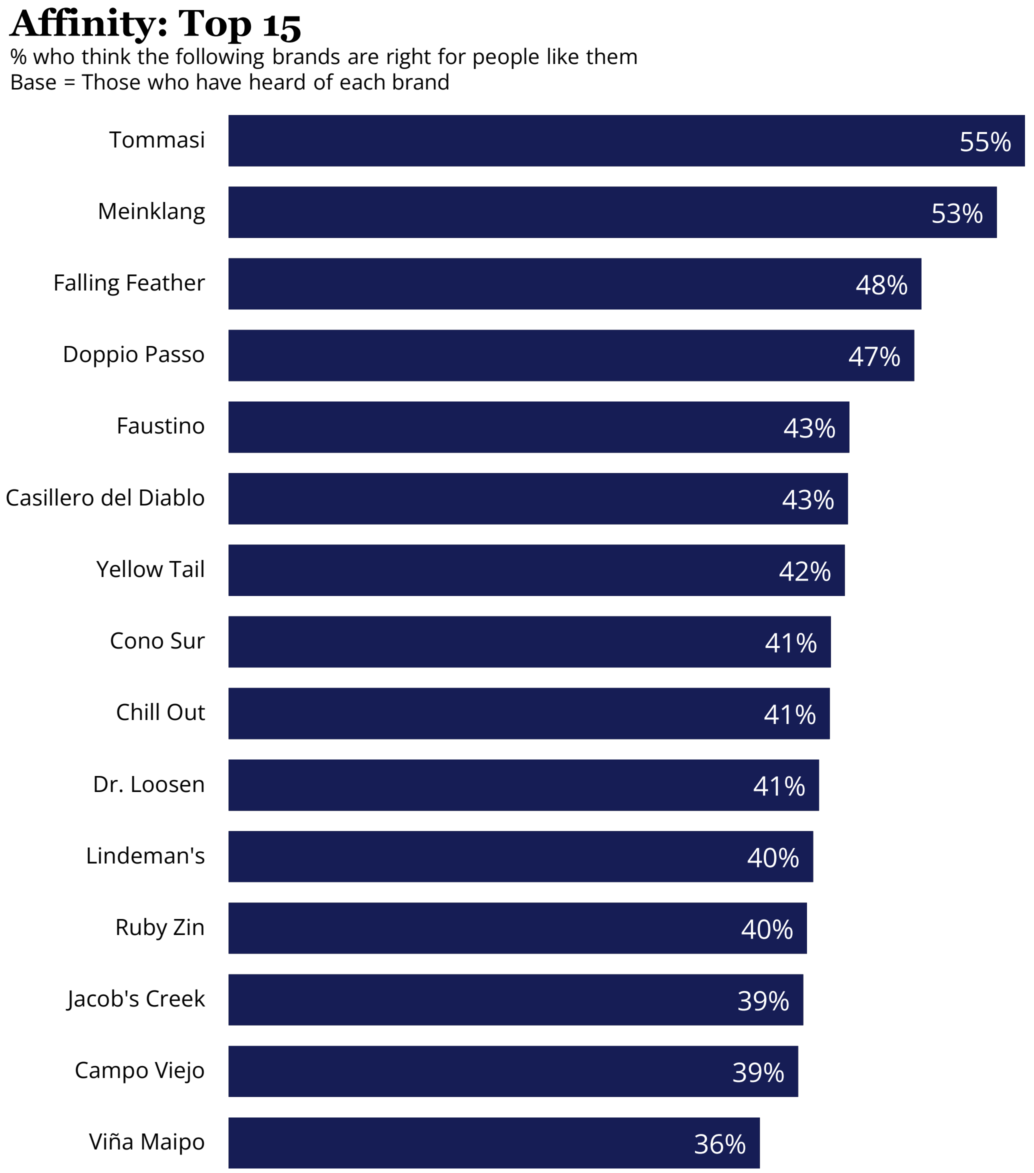
| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Meinklang | n/a | n/a | 58% | n/a | n/a |
| 2 | Tommasi | n/a | n/a | 57% | n/a | n/a |
| 3 | Cono Sur | 34% | 46% | 50% | → | → |
| 4= | Doppio Passo | n/a | n/a | 47% | n/a | n/a |
| 4= | Escada Touriga Nacional | n/a | n/a | 47% | n/a | n/a |
| 4= | Casillero del Diablo | 41% | 52% | 47% | → | → |
| 4= | Faustino | 39% | 44% | 47% | → | → |
| 4= | Falling Feather | n/a | n/a | 47% | n/a | n/a |
| 9= | Lindeman's | 37% | 44% | 45% | → | → |
| 9= | Villa Borghetti | 39% | 38% | 45% | → | → |
| 11= | Jacob's Creek | 48% | 48% | 44% | → | → |
| 11= | Campo Viejo | 35% | 43% | 44% | → | → |
| 13= | Banrock Station | 36% | 40% | 43% | → | → |
| 13= | Yellow Tail | n/a | n/a | 43% | n/a | n/a |
| 15= | Dr. Loosen | n/a | n/a | 42% | n/a | n/a |

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 15= | Chill Out | n/a | n/a | 42% | n/a | n/a |
| 17= | Torres | 42% | 47% | 40% | → | ↓ |
| 17= | Kim Crawford | 18% | 25% | 40% | → | → |
| 17= | J.P. Chenet | 33% | 42% | 40% | → | → |
| 20= | Wakefield | 22% | 38% | 39% | → | → |
| 20= | Marqués de Nombrevilla | n/a | n/a | 39% | n/a | n/a |
| 20= | Concha y Toro | 29% | 38% | 39% | → | → |
| 23= | M. Chapoutier | n/a | n/a | 38% | n/a | n/a |
| 23= | Ruby Zin | n/a | n/a | 38% | n/a | n/a |
| 23= | Tariquet | 23% | 29% | 38% | ↑ | → |
| 23= | Domaine Montrose | n/a | n/a | 38% | n/a | n/a |
| 27 | Viña Maipo | 33% | 37% | 36% | → | → |
| 28= | Gato Negro | 35% | 38% | 35% | → | → |
| 28= | Vidigal | 21% | 34% | 35% | → | → |
| 28= | Sunrise | 26% | 35% | 35% | → | → |

n/a = tracking unavailable for this wave
= 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® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Brand affinity

## More than half of those who are aware of Tommasi and Meinklang consider the brands to be right for them




Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Brand affinity: Tracking

## Mostly steady results for affinity, except for a few well-known brands, which have experienced a significant decrease in this metric

### Affinity: Tracking

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

Results for all 46 brands available in the data table

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Tommasi | n/a | n/a | 55% | n/a | n/a |
| 2 | Meinklang | n/a | n/a | 53% | n/a | n/a |
| 3 | Falling Feather | n/a | n/a | 48% | n/a | n/a |
| 4 | Doppio Passo | n/a | n/a | 47% | n/a | n/a |
| 5= | Faustino | 44% | 42% | 43% | → | → |
| 5= | Casillero del Diablo | 50% | 48% | 43% | ↓ | → |
| 7 | Yellow Tail | n/a | n/a | 42% | n/a | n/a |
| 8= | Cono Sur | 53% | 44% | 41% | → | → |
| 8= | Chill Out | n/a | n/a | 41% | n/a | n/a |
| 8= | Dr. Loosen | n/a | n/a | 41% | n/a | n/a |
| 11= | Lindeman's | 48% | 44% | 40% | → | → |
| 11= | Ruby Zin | n/a | n/a | 40% | n/a | n/a |
| 13= | Jacob's Creek | 54% | 45% | 39% | ↓ | → |
| 13= | Campo Viejo | 39% | 38% | 39% | → | → |
| 15= | Viña Maipo | 39% | 34% | 36% | → | → |

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 15= | Escada Touriga Nacional | n/a | n/a | 36% | n/a | n/a |
| 15= | Domaine Montrose | n/a | n/a | 36% | n/a | n/a |
| 18= | J.P. Chenet | 41% | 38% | 35% | → | → |
| 18= | Villa Borghetti | 38% | 43% | 35% | → | → |
| 20 | Torres | 44% | 43% | 34% | ↓ | ↓ |
| 21= | Vidigal | 37% | 27% | 33% | → | → |
| 21= | Banrock Station | 40% | 40% | 33% | → | → |
| 21= | Marqués de Nombrevilla | n/a | n/a | 33% | n/a | n/a |
| 24= | Gallo Family Vineyards | 24% | 27% | 32% | → | → |
| 24= | Kim Crawford | 0% | 28% | 32% | → | → |
| 26= | Mouton Cadet | 33% | 35% | 31% | → | → |
| 26= | Gato Negro | 40% | 36% | 31% | ↓ | → |
| 26= | Tariquet | 35% | 32% | 31% | → | → |
| 26= | Laroche | 34% | 34% | 31% | → | → |
| 26= | Concha y Toro | 36% | 37% | 31% | → | → |

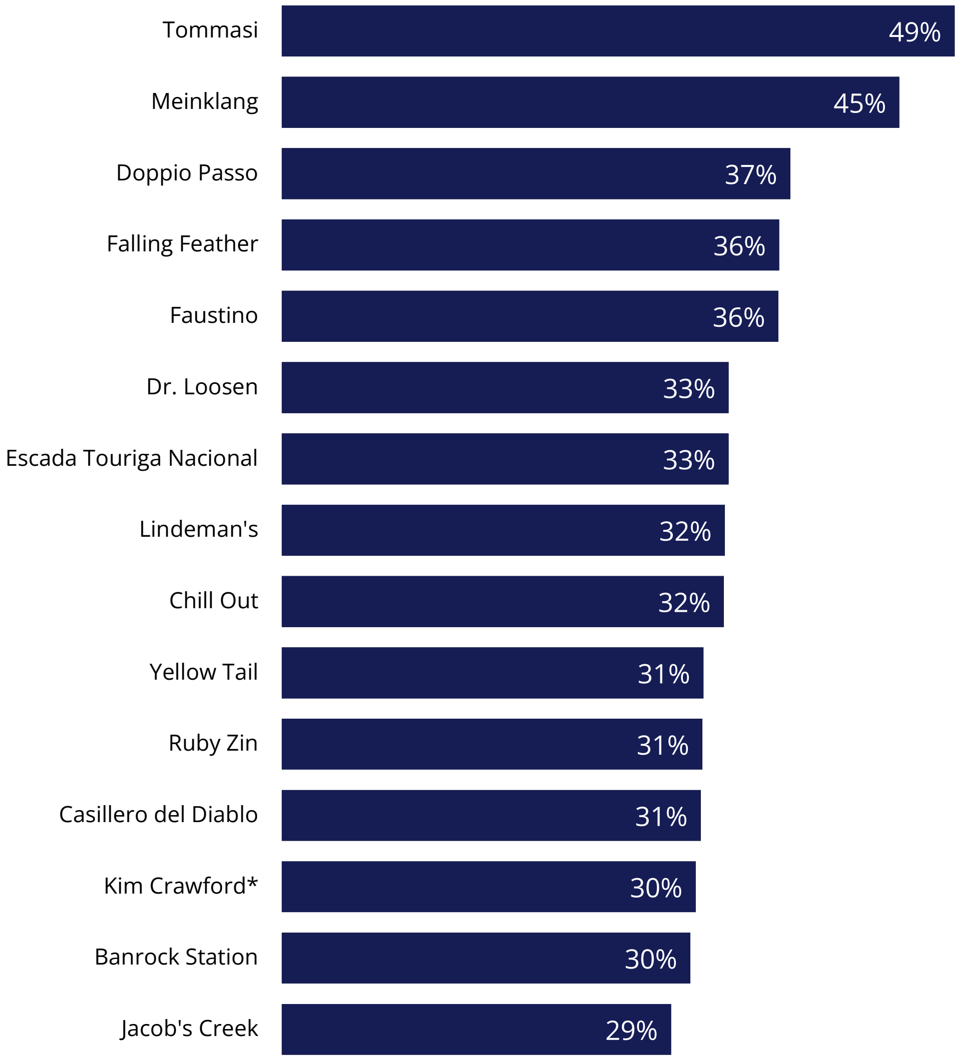
n/a = tracking unavailable for this wave
= Represents equal ranking ; grey shading: low sample size (n<50)
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Brand recommendation

## Also with strong scores for affinity, Tommasi and Meinklang rank in first and second place in terms of recommendation levels as well

### Recommendation: Top 15

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




* Low sample size (n<50)

Source: Wine Intelligence, Vinitrac® Norway, Jul '22 (n=504) Norwegian regular wine drinkers

# Brand recommendation: Tracking

## Most brands that experienced a decrease in affinity also experienced a decrease in recommendation

### Recommendation: Tracking

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

Results for all 46 brands available in the data table

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 1 | Tommasi | n/a | n/a | 49% | n/a | n/a |
| 2 | Meinklang | n/a | n/a | 45% | n/a | n/a |
| 3 | Doppio Passo | n/a | n/a | 37% | n/a | n/a |
| 4= | Falling Feather | n/a | n/a | 36% | n/a | n/a |
| 4= | Faustino | 37% | 37% | 36% | → | → |
| 6= | Dr. Loosen | n/a | n/a | 33% | n/a | n/a |
| 6= | Escada Touriga Nacional | n/a | n/a | 33% | n/a | n/a |
| 8= | Lindeman's | 34% | 33% | 32% | → | → |
| 8= | Chill Out | n/a | n/a | 32% | n/a | n/a |
| 10= | Yellow Tail | n/a | n/a | 31% | n/a | n/a |
| 10= | Ruby Zin | n/a | n/a | 31% | n/a | n/a |
| 10= | Casillero del Diablo | 42% | 42% | 31% | ↓ | ↓ |
| 13= | Kim Crawford | 0% | 29% | 30% | → | → |
| 13= | Banrock Station | 52% | 19% | 30% | → | → |
| 15 | Jacob's Creek | 43% | 39% | 29% | ↓ | ↓ |

| Ranking '22 | | 2017 (n=506) | 2018 (n=1,000) | 2022 (n=504) | Tracking vs. '17 | Tracking vs. '18 |
|---|---|---|---|---|---|---|
| 16= | Fetzer | 20% | 27% | 28% | → | → |
| 16= | Les Fumées Blanches | 28% | 32% | 28% | → | → |
| 18= | Domaine Montrose | n/a | n/a | 27% | n/a | n/a |
| 18= | M. Chapoutier | n/a | n/a | 27% | n/a | n/a |
| 20 | Campo Viejo | 26% | 31% | 26% | → | → |
| 21 | Torres | 32% | 36% | 25% | ↓ | ↓ |
| 22= | Laroche | 24% | 29% | 24% | → | → |
| 22= | Villa Borghetti | 26% | 33% | 24% | → | → |
| 24= | Gato Negro | 27% | 28% | 23% | → | → |
| 24= | Cono Sur | 37% | 40% | 23% | → | ↓ |
| 24= | Santa Carolina | n/a | 18% | 23% | n/a | → |
| 24= | Ravenswood | 28% | 37% | 23% | → | → |
| 28= | J.P. Chenet | 30% | 30% | 22% | ↓ | ↓ |
| 28= | Tariquet | 17% | 21% | 22% | → | → |
| 30 | Vidigal | 25% | 22% | 21% | → | → |

n/a = tracking unavailable for this wave
= 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® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian regular wine drinkers

# Research Methodology

**Norway Wine Landscapes**

2022

# Research methodology

## QUANTITATIVE

The data was collected in Norway since October 2013

The following waves, May 2017 and July 2018 were tracked against July 2022

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, 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 Norwegian regular wine drinkers in terms of age and gender*

The distribution of the sample is shown in the table

| | | Oct-13 | May-17 | Jul-18 | Jul-22 |
|---|---|---|---|---|---|
| | n= | 560 | 506 | 1000 | 504 |
| **Gender*** | Male | 51% | 50% | 52% | 48% |
| | Female | 49% | 50% | 48% | 52% |
| | ***Total*** | ***100%*** | ***100%*** | ***100%*** | ***100%*** |
| **Age** | 18-24 | 11% | 10% | 10% | 8% |
| | 25-34 | 17% | 17% | 15% | 17% |
| | 35-44 | 18% | 18% | 18% | 15% |
| | 45-54 | 18% | 18% | 17% | 15% |
| | 55 and over | 37% | 38% | 40% | 45% |
| | ***Total*** | ***100%*** | ***100%*** | ***100%*** | ***100%*** |

**Source:** Wine Intelligence, Vinitrac® Norway, May '17, Jul '18, Jul '22 (n≥504) Norwegian 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*

# Research methodology

## QUALITATIVE

Market interviews were conducted with three experienced industry professionals in the Norwegian wine trade in 2022.

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

The three interviewees were wine-industry professionals working within the market in the following different roles:

- Wine journalist
- Wine importer
- Market analyst

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