



A division of the IWSR Group

# South Korea

Wine Landscapes 2023



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# Wine Intelligence Viewpoint

The South Korean wine market continues to expand, and with new consumers comes increased knowledge and spend in the category

Following on from trends seen in the previous edition of our report, the South Korean wine market continues to have a growth spurt with almost 50% more weekly wine drinkers joining the category since 2019.

However, the category did experience a year-on-year decline in volumes. This was probably a result of the on-trade reopening and the easing of lockdown-related restrictions. This led to a drop in at-home consumption, a key driver for the category.

Consumers who have entered the market tend to be older and have higher salaries. They are involved in the market and know about countries of origin and brands.

As people with higher salaries have come into the market, spend on wine for both on- and off-trade occasions has increased significantly, though South Korean wine

drinkers are consuming far less on the same occasions as before, suggesting that they are using their money to buy better quality wine when they do drink.

This is a trend that can't be taken for granted, however. South Koreans are confident about their finances and the economy but report tightening up their spending on non-essentials such as wine and travel.

## Opportunities

Involvement in grape-based wine is growing.  
Category knowledge is increasing.  
Higher-earning drinkers are entering the market.

## Threats

Younger drinkers losing interest in wine.  
On-trade consumption dwindling.  
Economic uncertainty potentially spooking consumers.

# **Management Summary**

**South Korea Wine Landscapes**  
2023

# Management summary

## Key takeaways

**1. South Korea's wine drinking population increases**

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**2. Still wine sees a large year-on-year decline**

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**3. The wine drinking population is ageing**

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**4. Beverage repertoires are broadening**

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**5. Premiumisation trend in both the on- and off-trade**

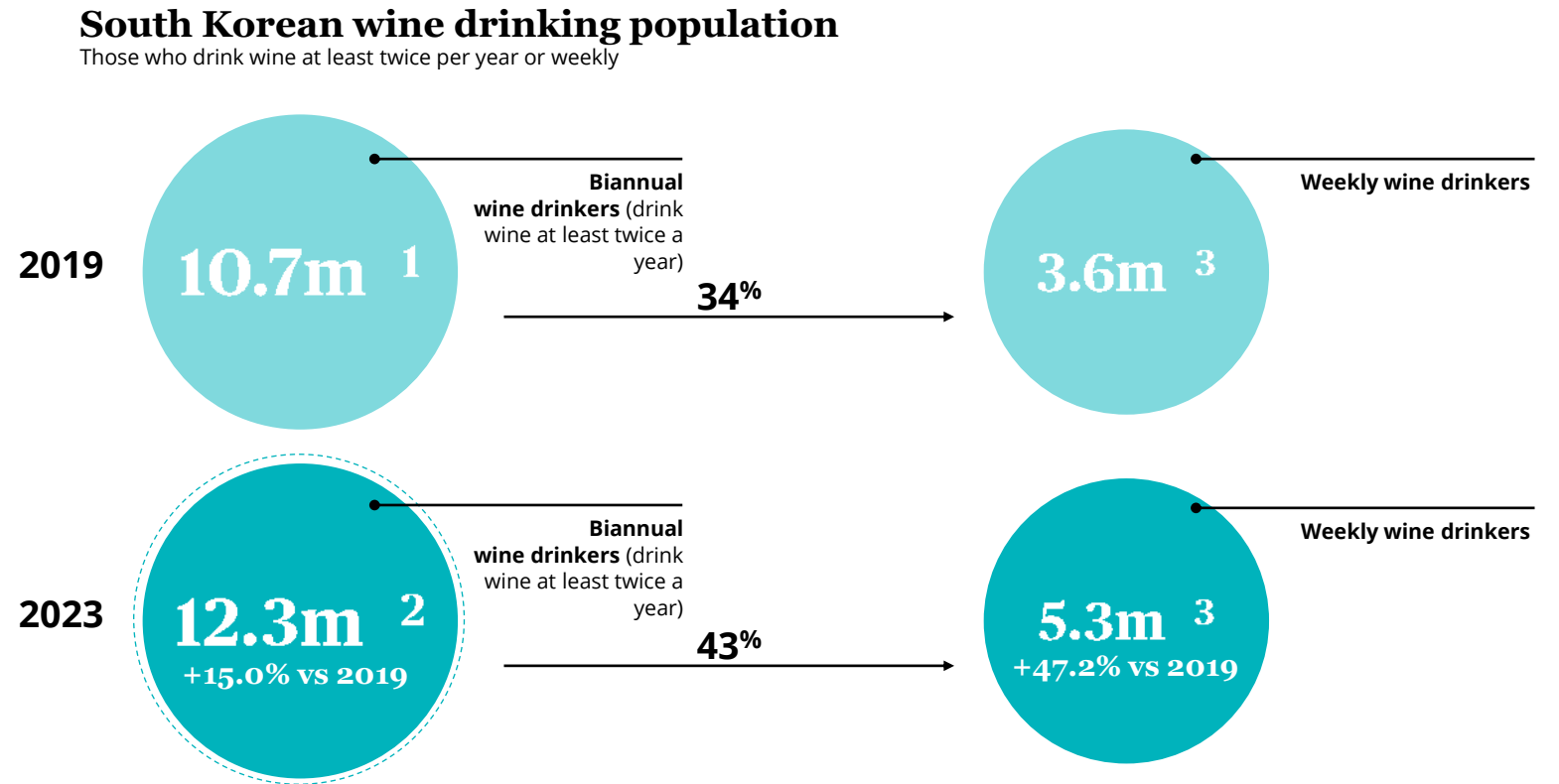
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**6. Higher wine knowledge, though confidence remains more flat**

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# 1. South Korea's wine drinking population increases

South Korea's biannual wine drinking population has increased, with more consumers entering the category and a growing adult population in general. The weekly wine drinking population has also increased substantially



Sources:

1 Wine Intelligence online calibration study with TNS, Jul '19, (n≥1,010) South Korean adults aged 19-64. Still grape-based wine: still red, white, rosé wine

2 Wine Intelligence online calibration study with TNS, rolling average of July 2022 (n=1,033) & April 2023 (n=1,043) South Korean adults aged 19-64. Still grape-based wine: still red, white, rosé wine

3 Wine Intelligence, Vinitrac® South Korea Oct '19, Apr '23 (n≥1,000) South Korean semi-annual imported grape-based wine drinkers aged 19-64

## 2. Still wine sees a large year-on-year decline

As the on-trade reopened and pandemic-related restrictions eased, volumes of still wine sold in South Korea declined, with a drop in at-home consumption, a key driver for the category. Chile, Spain and Australia felt the decline in wine volumes most sharply

### Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 21-22	CAGR 17-22
Total Wine	53,825.30	54,327.50	0.9%	-0.1%
Other Wines*	45,640.50	46,685.90	2.3%	-1.6%
Still Wine	7,374.60	6,660.50	-9.7%	13.4%
Sparkling Wine	796.10	963.10	21.0%	18.0%
Fortified Wine	9.00	11.20	24.6%	30.0%
Light Aperitifs	5.20	6.90	33.5%	20.2%

### Market context

The accelerated growth of still wine finally came to an end, with this category significantly declining year-on-year in 2022. This was due to the re-opening of the on-trade and easing of restrictions, which saw a dip in home consumption, the main driver for still wine during the pandemic.

*South Korea Executive Summary Report 2023*

Source: IWSR

\*Other Wines includes non-grape based wines

# 3. The wine drinking population is ageing

The proportion of wine drinkers aged 19-34 in South Korea has declined significantly since 2021. This has been accompanied by an increase in the proportion of high-earning wine drinkers

## Demographics of South Korean wine drinkers\*

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

### Age groupings

	2021	2023	Tracking
19-34	29%	24%	↓
35-54	57%	54%	→
55-64	14%	22%	↑

### Monthly household income before tax

	2021	2023	Tracking
Under ₩2,999,999	19%	11%	↓
₩3,000,000 - ₩3,999,999	15%	15%	→
₩4,000,000 - ₩4,999,999	14%	14%	→
₩5,000,000 - ₩5,999,999	17%	18%	→
More than ₩6,000,000	32%	40%	↑

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean \*semi-annual imported grape-based wine drinkers



# 4. Beverage repertoires are broadening

South Korean drinkers of imported wine chose from a wider repertoire of beverages than in 2021, most notably wines and spirits. Awareness of numerous countries of origins and brands also increased over the same period

## Alcoholic beverage repertoire: Tracking

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

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021 (n=1,000)	2022 (n=1,004)	2023 (n=1,004)	Tracking	
					vs. '21	vs. '22
1	Grape-based Red wine	86%	87%	90%	↑	→
2	Beer	87%	89%	89%	→	→
3	Soju	76%	76%	76%	→	→
4	Grape-based White wine	57%	58%	63%	↑	↑
5	Brandy / Cognac / Whisky	26%	36%	39%	↑	→
6	Other sparkling wine	29%	30%	29%	→	→
7	Vodka / Gin	20%	26%	28%	↑	→
8=	Grape-based Rosé wine	20%	22%	27%	↑	↑
8=	Champagne (French Champagne)	20%	24%	27%	↑	→
10	Sweet / dessert wine	22%	22%	21%	→	→
11	Cider	16%	17%	20%	↑	→
12	Pre-mixed / ready to drink alcoholic beverages	14%	16%	15%	→	→
13	Rum	10%	9%	13%	↑	↑
14	Liqueurs	8%	9%	11%	→	→
15	Port / Muscat	5%	5%	8%	↑	↑

=Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# 5. Premiumisation trend in both the on- and off-trade

Spend has increased significantly for all tested on- and off-trade occasions, though consumption frequency has remained stable since 2021. Gen Z is driving the premiumisation trend, with higher proportions of them spending more compared to wine drinkers in general

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

Base = Those who buy wine in the off-trade

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
A relaxing drink at the end of the day at home	₩28,727.00	₩29,555.68	₩31,216.95	↑	↑
With an informal meal at home	₩28,436.57	₩29,706.64	₩30,898.41	↑	→
With a more formal dinner party at home	₩38,920.48	₩41,043.94	₩42,640.25	↑	→
At a party / celebration at home	₩40,785.73	₩43,217.74	₩43,562.13	↑	→
As a gift for somebody	₩52,601.55	₩54,947.71	₩56,932.16	↑	→

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

Base = Those who buy wine in the on-trade

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
A relaxing drink out at the end of the day	₩43,750.91	₩44,050.62	₩47,130.34	↑	↑
With an informal meal in a bar / pub / club / karaoke / restaurant	₩52,442.39	₩54,373.96	₩56,492.68	↑	→
With a more formal dinner in a restaurant	₩63,170.25	₩64,673.36	₩68,859.43	↑	↑
At a party / celebration / big night out	₩61,807.17	₩64,121.74	₩67,880.06	↑	↑
During business lunch or dinner	₩50,610.07	₩52,702.57	₩55,891.81	↑	→

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# 6. Higher wine knowledge, though confidence remains more flat

Increases in repertoires and awareness align with the wine knowledge levels South Korean consumers report having. However, though knowledge has increased, confidence has not followed suit with the same significance

## Wine knowledge index: Tracking

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
Knowledge Index	25.5	27.0	27.2	↑	→

**+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 South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
Confidence Index	42.3	42.9	43.4	→	→

**+1.1**  
Index  
change

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

\*\*Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Management summary: Tracking metrics

Consumption incidences for grape-based red and white wine have increased significantly since 2021

## Top alcoholic beverages

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

	2021	2023	Tracking
Grape-based Red wine	86%	90%	↑
Beer	87%	89%	→
Soju	76%	76%	→
Grape-based White wine	57%	63%	↑
Brandy / Cognac / Whisky	26%	39%	↑

## Top country of origin

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

	2021	2023	Tracking
Chile	51%	56%	→
France	49%	52%	→
California - USA	24%	32%	↑
Italy	25%	27%	↑
Spain	24%	24%	→

## Top region of origin

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

	2021	2023	Tracking
Bordeaux	28%	32%	↑
Provence	16%	17%	→
Champagne	20%	16%	→
Sicily	15%	16%	↑
Bourgogne	14%	14%	→

## Top wine brands

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

	2021	2023	Tracking
1865	26%	28%	→
G7	16%	20%	↑
Casillero del Diablo	17%	20%	→
Yellow Tail	12%	14%	→
Montes	9%	11%	→

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '23, (n≥1,000) South Korean \*semi-annual imported grape-based wine drinkers

# Management summary: Tracking metrics

The proportions of respondents who have drunk Malbec and Sémillon has increased significantly since 2021; retailer and channel usage has remained broadly stable

## Top red varietals

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

	2021	2023	Tracking
Cabernet Sauvignon	55%	56%	→
Bonarda	17%	20%	→
Malbec	15%	19%	↑
Merlot	17%	18%	→
Pinot Noir	16%	17%	→

## Top white varietals

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

	2021	2023	Tracking
Sauvignon Blanc	44%	49%	→
Chardonnay	30%	33%	→
Moscato / Muscat	29%	31%	→
Sémillon	18%	19%	↑
Colombard	15%	15%	→

## Top wine-shopping channels

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

	2021	2023	Tracking
Hypermarkets	71%	69%	→
Wine shop / Shop specialised in alcohol	41%	41%	→
Department stores	n/a	30%	n/a
Discount supermarkets	25%	24%	→
From a supermarket / hypermarket website	19%	20%	→

## Top wine-buying retailers

% who mainly use the following retailers to buy wine

	2021	2023	Tracking
E-mart	55%	52%	→
Home Plus (Samsung-Tesco)	25%	26%	→
Lotte-mart	22%	22%	→
Costco	21%	19%	→
Shinsegae Department store	13%	15%	→

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '23, (n≥1,000) South Korean \*semi-annual imported grape-based wine drinkers

# **Market Data**

## **South Korea Wine Landscapes**

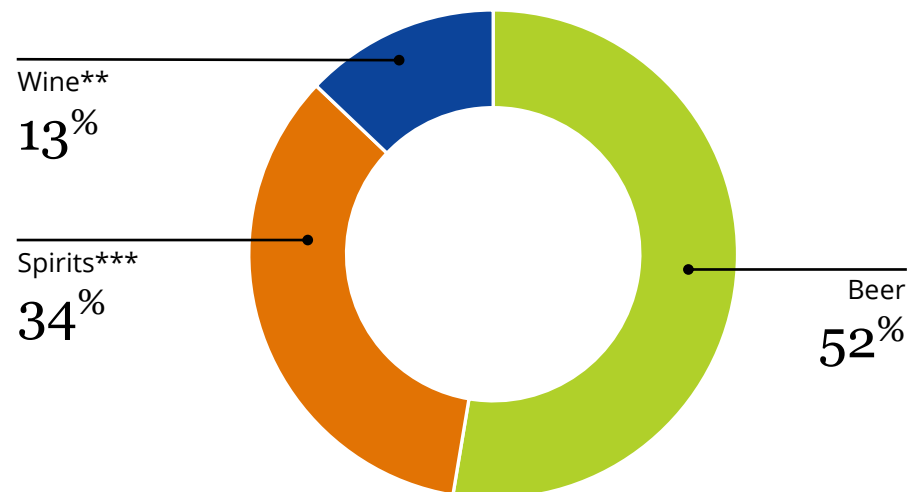
2023

# Total beverage alcohol market share by category

The wine category makes up only 13% of total alcohol sales in the South Korean market and experienced a small decline in volumes sold between 2017 and 2022

## Total beverage alcohol market share by category\*

% of purchases that fall within the categories below



## Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	409,107.10	423,326.00	-0.1%	0.6%
Beer	216,340.60	221,845.00	0.1%	0.6%
Spirits***	137,750.20	145,278.70	-0.5%	0.3%
Wine**	53,825.30	54,327.50	-0.1%	0.6%
Cider	363.30	1,089.40	60.3%	9.2%
RTDs	827.70	785.50	-20.4%	7.1%

### Market context

The return to normal post-pandemic should see some decrease in wine consumption as locals return to the on-trade.

*South Korea Executive Summary Report 2023*

Source: IWSR

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

\*\* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

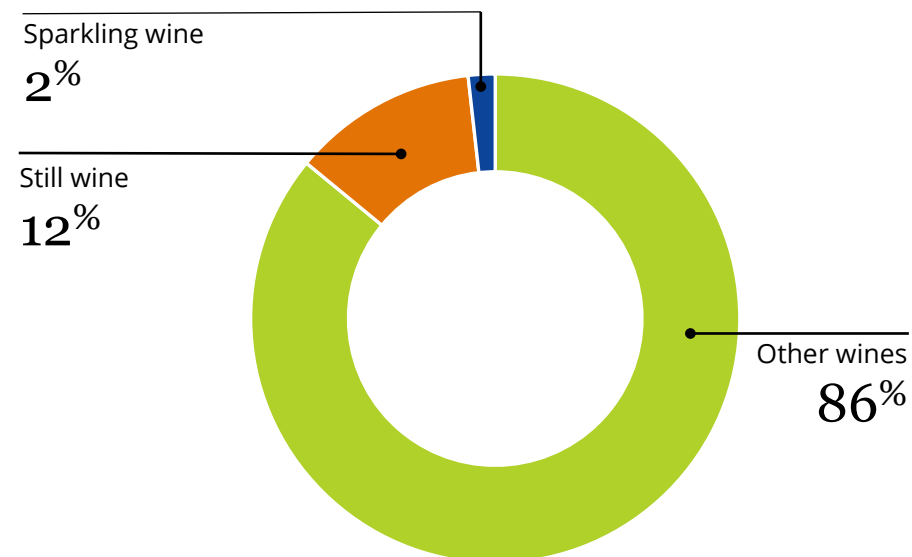
\*\*\* Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

# Total wine market volumes

Rapid growth in volumes of all wine types is forecast to plateau slightly, though total wine volumes are expected to recover by 2027

## Total wine share by category\*

% of purchases that fall within the categories below



## Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	53,825.30	54,327.50	-0.1%	0.6%
Other Wines**	45,640.50	46,685.90	-1.6%	0.0%
Still Wine	7,374.60	6,660.50	13.4%	3.6%
Sparkling Wine	796.10	963.10	18.0%	6.3%
Fortified Wine	9.00	11.20	30.0%	4.0%
Light Aperitifs	5.20	6.90	20.2%	5.0%

Source: IWSR

\*Fortified Wine and Other Wines omitted from pie chart due to low percentage value

\*\*Other Wines includes non-grape based wines



# Still wine volumes by origin

The rapid growth of imported wine and a decline in domestic products are forecast to slow slightly by 2027

## Total still wine volumes and market share by origin

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
Total	7,374.60	6,660.50	13.4%	3.6%	
1 Chilean	1,830.70	1,506.80	9.3%	3.8%	23%
2 French	1,180.40	1,124.80	21.7%	3.3%	17%
3 Italian	1,025.60	1,014.80	21.4%	2.7%	15%
4 Spanish	977.20	781.50	11.1%	2.9%	12%
5 US	751.40	737.40	20.3%	4.9%	11%
6 Australian	530.40	461.90	13.6%	4.3%	7%
7 South Korean	380.00	342.00	-8.4%	-3.2%	5%
8 New Zealand	211.00	202.20	45.5%	8.4%	3%
9 Argentinian	226.00	189.40	13.9%	6.4%	3%
10 Portuguese	99.00	103.90	47.3%	4.1%	2%

### Market context

Local still wines will continue to decline as they fall out of fashion.

*South Korea Executive Summary Report 2023*

Source: IWSR

# Still wine retail price by origin

All countries of origin have experienced an increase in price points that their wine sells for in South Korea; this growth is forecasted to slow down in the near future

## Historic and forecast growth: Retail price

Five-year CAGR % calculated using a fixed exchange rate

	Retail price per 0.75l 2022 (US\$)	CAGR 17-22	CAGR F 22-27
Total	15.06	4.4%	0.5%
1 Chilean	13.41	1.4%	0.8%
2 French	21.78	2.5%	-0.2%
3 Italian	13.83	3.1%	0.1%
4 Spanish	10.29	2.0%	0.0%
5 US	10.98	3.3%	0.3%
6 Australian	15.58	4.6%	0.3%
7 South Korean	9.83	2.9%	0.0%
8 New Zealand	34.67	2.8%	0.0%
9 Argentinian	18.93	3.7%	0.8%
10 Portuguese	18.89	2.1%	0.0%

### Market context

Despite prices being low relative to other categories, still wine is still significantly more expensive than local soju, beer, or rice wine, because it is subject to high taxes.

*South Korea Executive Summary Report 2023*

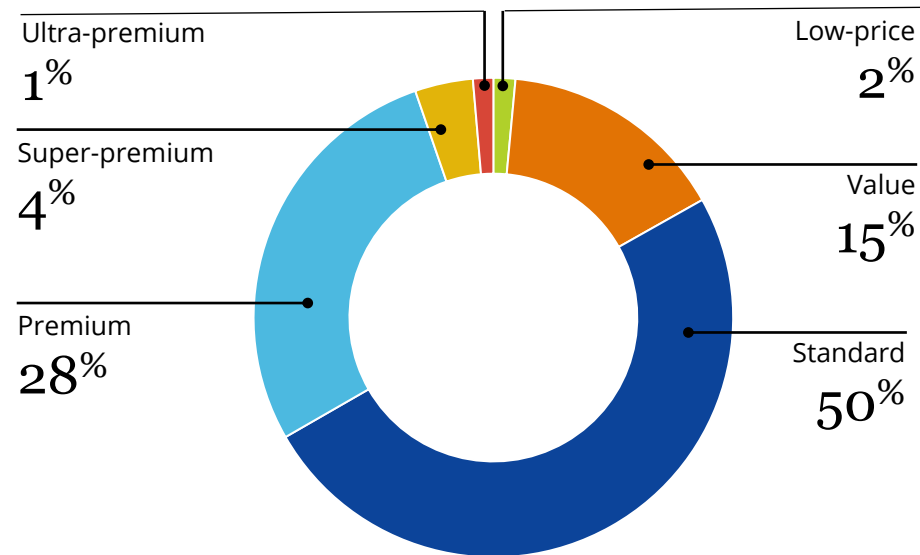
Source: IWSR

# Still wine by price band

The volume of still wine sold increased in all price brands between 2017 and 2022, although wine sold at premium-and-below prices has experienced a decline since 2021

## Still wine by price band\*

% of purchases that fall within the categories below



## Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under ₩6,000.00)	122.90	98.30	22.6%	3.0%
Value (between ₩6,000.00 to ₩9,999.99)	1,041.49	1,022.09	12.8%	3.1%
Standard (between ₩10,000.00 to ₩19,999.99)	3,975.46	3,317.50	9.0%	3.1%
Premium (between ₩20,000.00 to ₩39,999.99)	1,910.62	1,864.71	21.6%	4.5%
Super Premium (between ₩40,000.00 to ₩59,999.99)	244.29	260.50	33.4%	7.0%
Ultra Premium (between ₩60,000.00 to ₩99,999.99)	74.22	90.83	18.1%	4.5%
Prestige (over ₩100,000.00)	5.65	6.57	26.9%	2.2%

Source: IWSR

\* Prestige omitted from pie chart due to low percentage value

# Still wine consumption per capita

There was growth in per capita consumption between 2017-22, but a decline was seen from 2021-22

## Market context

The still wine category is still in the early stages of development, and per-capita consumption is low, showing that the category still has huge potential despite the spike during the pandemic

*South Korea Executive Summary Report 2023*

## Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.7	49.0	12.3%	5.0%
2	Portugal	43.0	45.7	-0.9%	6.3%
3	Montenegro	41.8	42.6	-0.9%	2.0%
4	Italy	42.2	39.9	-2.8%	-5.2%
5	Slovenia	37.6	37.8	-2.8%	0.5%
6	St. Barths	33.9	37.2	9.3%	9.8%
7	Switzerland	36.1	34.9	-1.6%	-3.3%
8=	France	35.6	33.8	-5.3%	-5.0%
8=	Greece	28.0	33.8	0.5%	20.9%
10	Hungary	31.5	32.7	0.6%	3.6%
11	Denmark	33.3	30.9	-1.3%	-7.2%
12=	Austria	30.9	30.1	-1.3%	-2.6%
12=	Turks and Caicos	27.6	30.1	-2.9%	9.2%
14	Romania	27.5	27.9	2.4%	1.2%
15	US Virgin Islands	27.8	27.8	-2.6%	0.3%
16	Germany	26.4	25.2	-2.5%	-4.8%
17	Argentina	25.3	24.9	-2.7%	-1.5%
18	Malta	21.2	24.3	-6.4%	14.9%
19=	Uruguay	25.6	23.4	-1.3%	-8.6%
19=	Slovakia	22.9	23.4	-0.1%	1.9%
96=	South Korea	1.5	1.4	12.5%	-10.2%

Source: IWSR

# Sparkling wine volumes by origin

Imported sparkling wine volumes increased for all countries of origin except Germany; growth trends are expected to continue, though at slower rates

## Total sparkling wine volumes and market share by origin

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
Total	796.10	963.05	18.0%	6.3%	
1 Italian	258.00	329.50	16.1%	2.3%	34%
2 French	189.85	275.50	24.1%	9.5%	29%
3 Spanish	143.00	198.60	20.9%	10.2%	21%
4 US	71.30	34.00	24.8%	-0.6%	4%
5 Chilean	27.00	28.50	22.7%	1.8%	3%
6 Australian	24.05	23.15	22.2%	1.9%	2%
7 South Korean	26.00	23.00	-7.5%	7.5%	2%
8 German	21.10	22.90	-2.5%	3.4%	2%
9 International*	15.65	11.05	49.1%	2.9%	1%
10 South African	12.00	7.20	0.0%	3.9%	1%

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

Source: IWSR

# Sparkling wine retail price by origin

All countries of origin except France, Australia and South Korea experienced growth in sparkling wine retail prices from 2017–22, though this is not generally forecast to continue through to 2027

## Historic and forecast growth: Retail price

Five-year CAGR % calculated using a fixed exchange rate

	Retail price per 0.75l 2022 (US\$)	CAGR 17-22	CAGR F 22-27
Total	27.10	2.7%	0.9%
1 Italian	18.93	3.7%	0.1%
2 French	52.27	-2.1%	-0.1%
3 Spanish	15.30	3.8%	-0.4%
4 US	17.19	2.1%	0.0%
5 Chilean	15.95	3.3%	0.2%
6 Australian	14.58	-2.7%	0.2%
7 South Korean	4.47	-0.1%	-0.8%
8 German	17.02	1.0%	0.0%
9 International*	14.71	2.2%	0.0%
10 South African	15.48	n/a	0.0%

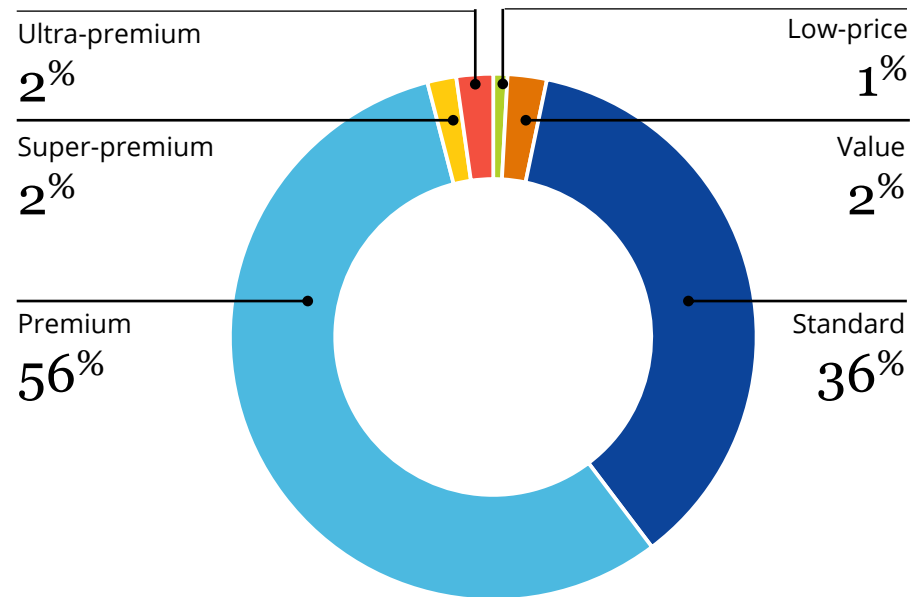
\*International refers to wine where grapes are from multiple countries of origin  
Source: IWSR

# Sparkling wine by price band

Sparkling wine volumes sold at standard-and-above prices have grown, but value-and-below fizz has declined

## Sparkling wine by price band\*

% of purchases that fall within the categories below



Note: Sparkling wine does not include Champagne but does include no- and low-alcohol sparkling wine

## Sparkling wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under ₩6,000.00)	8.00	7.00	-6.9%	11.4%
Value (between ₩6,000.00 to ₩9,999.99)	19.60	19.20	-6.5%	6.8%
Standard (between ₩10,000.00 to ₩19,999.99)	210.20	291.30	19.6%	7.7%
Premium (between ₩20,000.00 to ₩39,999.99)	409.80	450.00	19.7%	3.9%
Super Premium (between ₩40,000.00 to ₩59,999.99)	9.60	14.20	55.7%	5.8%
Ultra Premium (between ₩60,000.00 to ₩99,999.99)	9.00	18.00	n/a	8.0%
Prestige (over ₩100,000.00)	0.00	1.00	n/a	8.8%

### Market context

Sparkling wine, except for Champagne, is experiencing growth at mealtime occasion, as it is more compatible with local cuisine than most still wines.

*South Korea Executive Summary Report 2023*

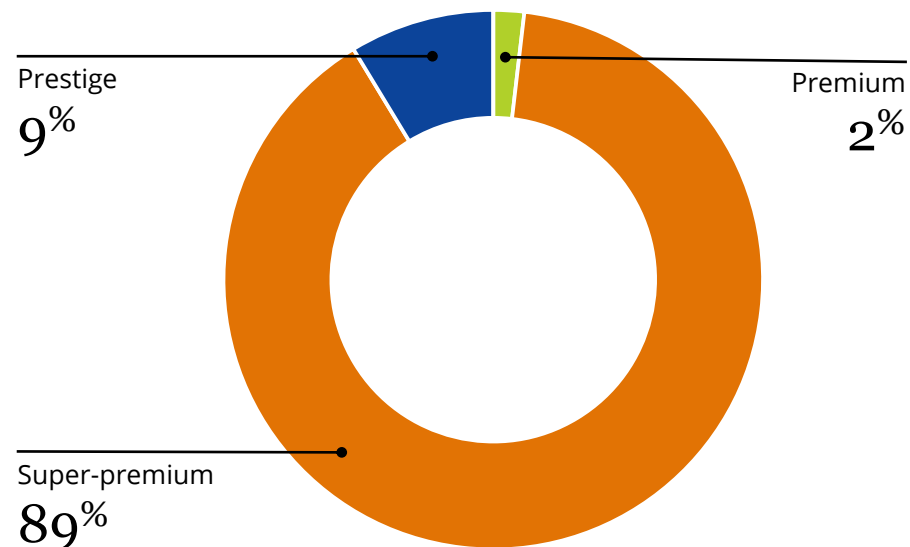
\*Prestige omitted from pie chart due to low percentage value  
Source: IWSR

# Champagne by price band

Champagne has experienced an increase in volumes sold in the South Korean market across all price points; nearly all its volume is sold in the super-premium price band

## Champagne by price brand

% of purchases that fall within the categories below



## Champagne volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Premium (Under ₩60,000.00)	2.00	3.00	18.7%	8.3%
Super Premium (₩60,000.00 to ₩249,999.99)	113.70	145.40	15.1%	9.9%
Prestige (over ₩250,000.00)	14.30	14.10	15.3%	8.4%

### Market context

Champagne is witnessing a surge in popularity in the club scene, as its high margins enable both clubs and brand owners to make significant investments in promotion.

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Source: IWSR



# Sparkling wine consumption per capita

South Korea has seen large growth in its per capita consumption since 2017, although the market's low ranking shows that it is still a niche product

## Market context

Per-capita consumption remains relatively low for sparkling wine, providing ample opportunities for growth as consumer occasions continue to expand

*South Korea Executive Summary Report 2023*

## Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.5	13.6	13.1%	8.9%
2	St. Martin and St. Maarten	6.3	8.3	21.7%	32.6%
3	Italy	7.9	7.4	-1.2%	-6.2%
4	Turks and Caicos	5.3	6.5	-2.4%	23.4%
5	Germany	5.3	5.5	-1.9%	3.7%
6	Lithuania	4.9	5.1	7.3%	3.6%
7=	Latvia	4.5	4.9	2.6%	9.4%
7=	France	4.7	4.9	-1.3%	2.7%
9	Guadeloupe	4.2	4.8	-1.8%	15.5%
10	Martinique	4.2	4.4	-4.6%	4.8%
11=	Estonia	4.1	4.3	4.0%	6.3%
11=	Belgium and Luxembourg	4.3	4.3	-1.5%	-0.2%
13	Austria	3.4	3.5	0.3%	2.9%
14=	Switzerland	3.2	3.3	0.9%	3.0%
14=	Cayman Islands	3.1	3.3	2.1%	5.8%
14=	Sweden	3.3	3.3	6.7%	0.6%
17=	United Kingdom	3.2	3.0	-0.6%	-4.8%
17=	Slovenia	2.9	3.0	3.0%	4.1%
19=	New Zealand	3.1	2.9	-1.6%	-6.1%
19=	Reunion	2.6	2.9	0.7%	14.7%
83=	South Korea	0.2	0.2	17.0%	20.3%

Source: IWSR

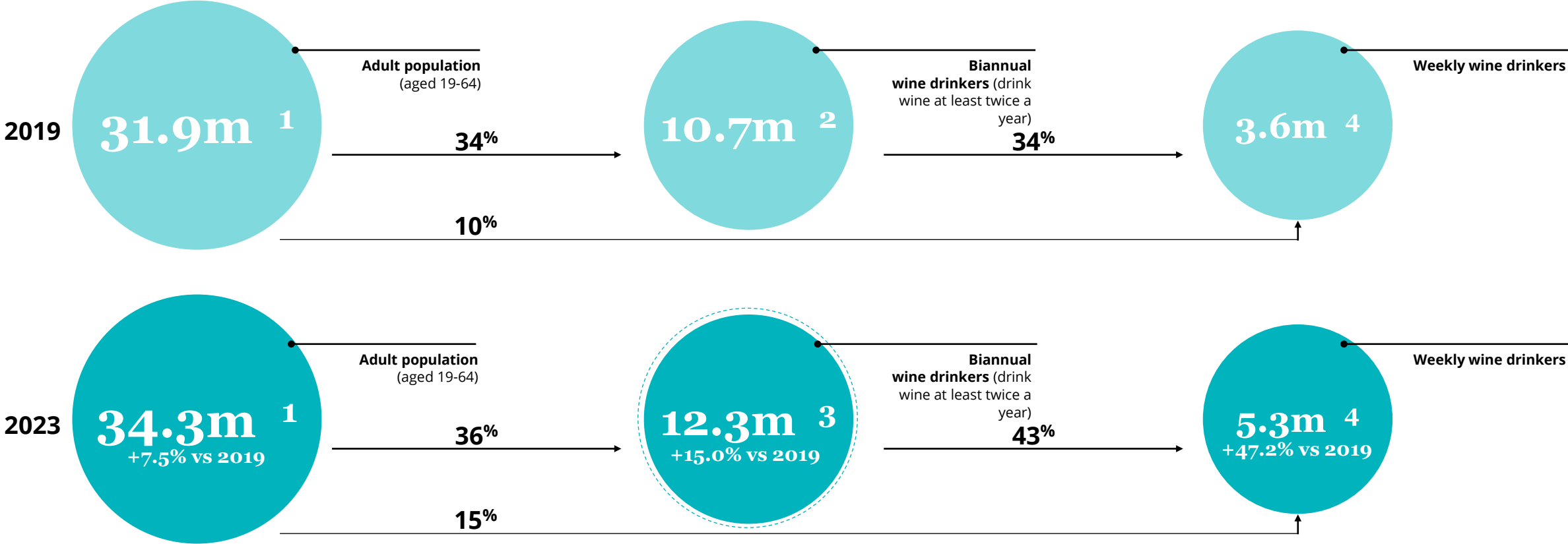
# **Market Demographics**

## **South Korea Wine Landscapes**

2023

# South Korean semi-annual wine drinkers

There has been sizeable growth in the biannual wine drinking population as the incidence rate of consumption increases and the adult population grows; the weekly wine drinking population has increased substantially



Sources: 1 Adults ages 19-64, KOSIS

2 Wine Intelligence online calibration study with TNS, Jul '19, (n≥1,010) South Korean adults aged 19-64. Still grape-based wine: still red, white, rosé wine

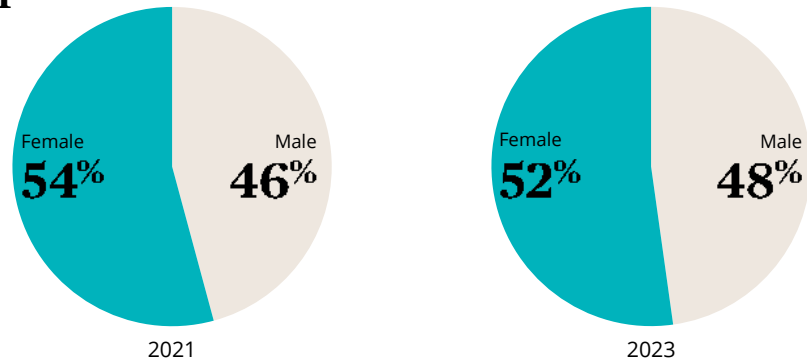
3 Wine Intelligence online calibration study with TNS, rolling average of July 2022 (n=1,033) & April 2023 (n=1,043) South Korean adults aged 19-64. Still grape-based wine: still red, white, rosé wine

4 Wine Intelligence, Vinitrac® South Korea Oct '19, Apr '23 (n≥1,000) South Korean semi-annual imported grape-based wine drinkers aged 19-64

# Demographics of South Korean wine drinkers\*

The demographics of South Korea consumers have remained stable since 2021, apart from a significant increase in the proportion earning more than ₩6 million a month

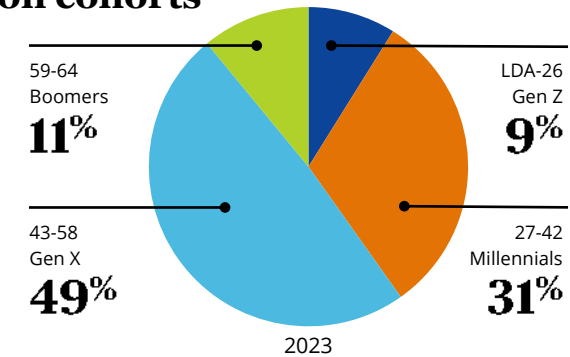
## Gender



## Regions

	2021	2023	Tracking
Seoul	37%	40%	➔
Gyeonggi and Gangwon	32%	30%	➔
Gyeongsang	19%	20%	➔
Jeolla	4%	5%	➔
Chungcheong	6%	6%	➔
Jeju	1%	0%	➔

## Generation cohorts



## Monthly household income before tax

	2021	2023	Tracking
Under ₩2,999,999	19%	11%	⬇️
₩3,000,000 - ₩3,999,999	15%	15%	➔
₩4,000,000 - ₩4,999,999	14%	14%	➔
₩5,000,000 - ₩5,999,999	17%	18%	➔
More than ₩6,000,000	32%	40%	⬆️

Note: tracking not available for generation cohorts due to change in data collection

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '23, (n≥1,000) South Korean \*semi-annual imported grape-based wine drinkers

# **Drinking Repertoire**

**South Korea Wine Landscapes**  
2023

# Drinking repertoire

Beverage repertoires in South Korea have broadened since 2021, especially for various types of wine and spirits

## Alcoholic beverage repertoire: Tracking

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

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021 (n=1,000)	2022 (n=1,004)	2023 (n=1,004)	Tracking	
					vs. '21	vs. '22
1	Grape-based Red wine	86%	87%	90%	↑	→
2	Beer	87%	89%	89%	→	→
3	Soju	76%	76%	76%	→	→
4	Grape-based White wine	57%	58%	63%	↑	↑
5	Brandy / Cognac / Whisky	26%	36%	39%	↑	→
6	Other sparkling wine	29%	30%	29%	→	→
7	Vodka / Gin	20%	26%	28%	↑	→
8=	Grape-based Rosé wine	20%	22%	27%	↑	↑
8=	Champagne (French Champagne)	20%	24%	27%	↑	→
10	Sweet / dessert wine	22%	22%	21%	→	→
11	Cider	16%	17%	20%	↑	→
12	Pre-mixed / ready to drink alcoholic beverages	14%	16%	15%	→	→
13	Rum	10%	9%	13%	↑	↑
14	Liqueurs	8%	9%	11%	→	→
15	Port / Muscat	5%	5%	8%	↑	↑

=Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Varietal consumption

Varietal consumption has remained broadly stable, except for significant growth in Malbec

## White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months  
Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021 (n=1,000)	2022 (n=1,004)	2023 (n=1,004)	Tracking	
					vs. '21	vs. '22
1	Sauvignon Blanc	44%	53%	49%	→	↓
2	Chardonnay	30%	33%	33%	→	→
3	Moscato / Muscat	29%	30%	31%	→	→
4	Sémillon	18%	19%	19%	→	→
5	Colombard	15%	14%	15%	→	→
6	Albariño	13%	13%	14%	→	→
7	Riesling	13%	14%	13%	→	→
8=	Pinot Grigio / Pinot Gris	12%	11%	11%	→	→
8=	Chenin Blanc	13%	13%	11%	→	→
10	Viognier	9%	8%	9%	→	→
11	Verdejo	8%	8%	8%	→	→
12	Torrontés	8%	6%	7%	→	→
13	Gewürztraminer	9%	5%	6%	↓	→

## Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months  
Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021 (n=1,000)	2022 (n=1,004)	2023 (n=1,004)	Tracking	
					vs. '21	vs. '22
1	Cabernet Sauvignon	55%	59%	56%	→	→
2	Bonarda	17%	18%	20%	→	→
3	Malbec	15%	17%	19%	↑	→
4	Merlot	17%	18%	18%	→	→
5	Pinot Noir	16%	19%	17%	→	→
6	Petit Verdot	16%	16%	16%	→	→
7	Shiraz / Syrah	16%	14%	15%	→	→
8	Grenache / Garnacha	14%	12%	13%	→	→
9	Carménère	12%	13%	12%	→	→
10	Sangiovese	12%	11%	11%	→	→
11=	Zinfandel	9%	10%	10%	→	→
11=	Gamay	11%	11%	10%	→	→
13	Pinotage	9%	9%	8%	→	→
14	Tempranillo	8%	8%	7%	→	→

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Ideal wine attributes

The top ideal wine attributes for both red and white wine include easy to drink, elegant and sweet, while fewer consumers chose strong flavour attributes

## Ideal white wine attributes: Top 15

% who select each description for their ideal white wine

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

Ranking '23		2022 (n=1,004)	2023 (n=1,004)	Tracking vs. '22
1	Easy to drink	40%	39%	→
2	Sweet	38%	38%	→
3	Light	40%	37%	→
4	Fresh	38%	35%	→
5	Soft	33%	33%	→
6	Elegant	26%	26%	→
7	Smooth	22%	23%	→
8	Delicate	23%	21%	→
9	Fruity	16%	19%	→
10	Dry	19%	18%	→
11	Juicy	17%	17%	→
12=	Oaky	9%	11%	→
12=	Creamy	8%	11%	↑
12=	Complex	7%	11%	↑
15	Simple	6%	10%	↑

## Ideal red wine attributes: Top 15

% who select each description for their ideal red wine

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

Ranking '23		2022 (n=1,004)	2023 (n=1,004)	Tracking vs. '22
1	Elegant	33%	34%	→
2	Easy to drink	32%	31%	→
3	Sweet	34%	30%	↓
4	Rich	24%	26%	→
5	Dry	25%	25%	→
6=	Complex	24%	24%	→
6=	Delicate	22%	24%	→
8	Full-bodied	25%	23%	→
9=	Tannic	19%	20%	→
9=	Oaky	20%	20%	→
11	Smoky	16%	18%	→
12	Bold	14%	16%	→
13=	Soft	14%	14%	→
13=	Smooth	14%	14%	→
15	Fruity	10%	13%	↑

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Apr '22, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers

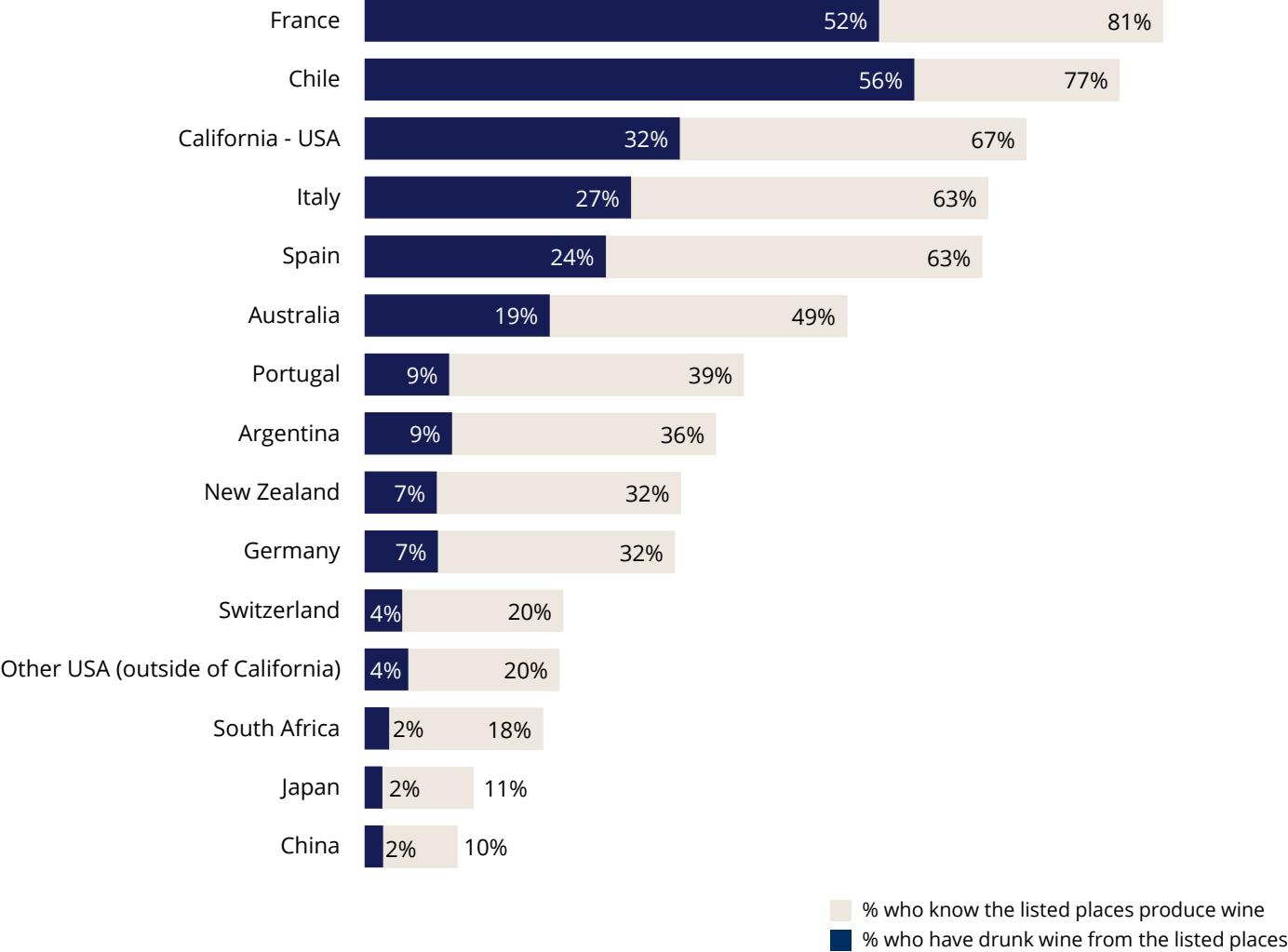


# Country of origin awareness and consumption

There is high awareness of a variety of countries of origin, with Old and New World countries sharing the top positions

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

% of those who know of or have drunk wine from the following places in the past six months  
 Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers

# Country of origin awareness

Awareness has increased significantly for nearly all countries of origin since 2021, and remained stable over the past year

## Country of origin awareness: Tracking

% of those who know the following places produce wine

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	France	77%	83%	81%	↑	→
2	Chile	70%	76%	77%	↑	→
3	California - USA	50%	65%	67%	↑	→
4=	Italy	58%	64%	63%	↑	→
4=	Spain	56%	63%	63%	↑	→
6	Australia	42%	50%	49%	↑	→
7	Portugal	27%	37%	39%	↑	→
8	Argentina	27%	37%	36%	↑	→
9=	New Zealand	25%	33%	32%	↑	→
9=	Germany	28%	32%	32%	→	→
11=	Switzerland	17%	21%	20%	→	→
11=	Other USA (outside of California)	26%	21%	20%	↓	→
13	South Africa	13%	16%	18%	↑	→
14	Japan	7%	9%	11%	↑	→
15	China	7%	8%	10%	→	→

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Country of origin consumption

Higher country of origin awareness has not translated into greater purchase rates, apart from for Chile, California and Portugal

## Country of origin consumption: Tracking

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

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	Chile	51%	55%	56%	↑	→
2	France	49%	55%	52%	→	→
3	California - USA	24%	33%	32%	↑	→
4	Italy	25%	28%	27%	→	→
5	Spain	24%	26%	24%	→	→
6	Australia	17%	20%	19%	→	→
7=	Argentina	7%	9%	9%	→	→
7=	Portugal	6%	7%	9%	↑	→
9=	Germany	10%	6%	7%	→	→
9=	New Zealand	6%	8%	7%	→	→
11=	Other USA (outside of California)	7%	5%	4%	↓	→
11=	Switzerland	5%	5%	4%	→	→
13=	South Africa	2%	3%	2%	→	→
13=	China	1%	1%	2%	↑	→
13=	Japan	1%	1%	2%	→	↑

= Represents equal ranking

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

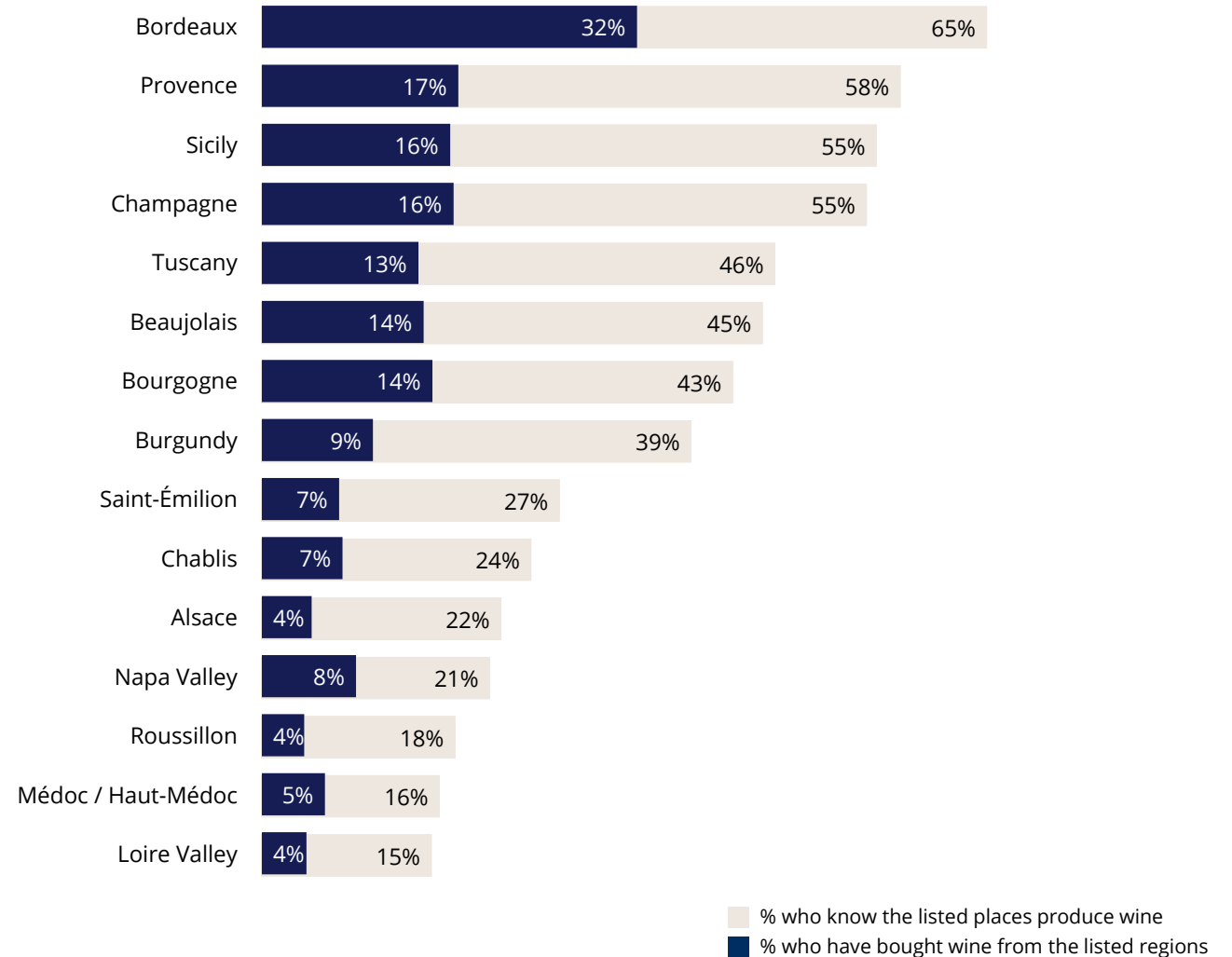
Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Region of origin awareness and purchase

There is high awareness of many wine producing regions, with Bordeaux leading for purchases

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

% of those who know of or have bought wine from the following regions in the past three months  
Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers

# Region of origin awareness

Unlike the growing awareness of countries of origin, the rates for regions in South Korea are broadly unchanged since 2021

## Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	Bordeaux	59%	64%	65%	↑	→
2	Provence	59%	61%	58%	→	→
3=	Sicily	55%	54%	55%	→	→
3=	Champagne	56%	57%	55%	→	→
5	Tuscany	42%	50%	46%	↑	→
6	Beaujolais	46%	50%	45%	→	↓
7	Bourgogne	39%	44%	43%	→	→
8	Burgundy	39%	40%	39%	→	→
9	Saint-Émilion	30%	32%	27%	→	↓
10	Chablis	32%	26%	24%	↓	→
11	Alsace	19%	20%	22%	→	→
12	Napa Valley	20%	20%	21%	→	→
13	Roussillon	18%	18%	18%	→	→
14	Médoc / Haut-Médoc	14%	18%	16%	→	→
15=	Loire Valley	19%	16%	15%	→	→

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Region of origin purchase

In line with awareness, region of origin purchase rates have remained broadly stable since 2021

## Region of origin purchase: Top 15, tracking

% who have bought wine from the following regions in the past three months  
Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	Bordeaux	28%	33%	32%	→	→
2	Provence	16%	18%	17%	→	→
3=	Champagne	20%	19%	16%	↓	→
3=	Sicily	15%	14%	16%	→	→
5=	Bourgogne	14%	15%	14%	→	→
5=	Beaujolais	16%	18%	14%	→	↓
7	Tuscany	12%	14%	13%	→	→
8	Burgundy	10%	11%	9%	→	→
9	Napa Valley	7%	8%	8%	→	→
10=	Chablis	8%	6%	7%	→	→
10=	Saint-Émilion	8%	9%	7%	→	↓
12	Médoc / Haut-Médoc	6%	5%	5%	→	→
13=	Alsace	3%	4%	4%	→	→
13=	Châteauneuf-du-Pape	6%	3%	4%	→	→
13=	Loire Valley	4%	4%	4%	→	→

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# **Wine-Buying Behaviours**

**South Korea Wine Landscapes**  
2023

# Wine-buying channel usage

Channels for buying wine have remained broadly unchanged over the past two years, apart from growth for airport duty-free as travel restrictions eased

## Market context

There are more neighbourhood wine retail shops, making it easier for locals to purchase wine

*South Korea Executive Summary Report 2023*

## Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months  
Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021 (n=1,000)	2022 (n=1,004)	2023 (n=1,004)	Tracking	
					vs. '21	vs. '22
1	Hypermarkets	71%	72%	69%	→	→
2	Wine shop / Shop specialised in alcohol	41%	40%	41%	→	→
3	Department stores	n/a	27%	30%	n/a	→
4	Discount supermarkets	25%	25%	24%	→	→
5	From a supermarket / hypermarket website	19%	18%	20%	→	→
6	Duty free (at airport)	13%	10%	18%	↑	↑
7	Corner shop / Ordinary grocery shop / Convenience store	13%	15%	14%	→	→
8	Shopping Malls	19%	15%	13%	↓	→
9	Supermarkets	13%	11%	12%	→	→
10	From a winery during a visit	7%	7%	9%	→	→
11	From a delivery app	5%	5%	4%	→	→

23% are online wine buyers vs 22% in 2021

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®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers



# Wine-buying retailer usage

In line with the picture in buying channels, wine drinkers' favourite retailers have remained unchanged in South Korea over the past two years

## Wine-buying retailer usage: Tracking

% who mainly use the following retailers to buy wine

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	E-mart	55%	56%	52%	→	→
2	Home Plus (Samsung-Tesco)	25%	27%	26%	→	→
3	Lotte-mart	22%	21%	22%	→	→
4	Costco	21%	22%	19%	→	↓
5	Shinsegae Department store	13%	14%	15%	→	→
6=	Wine Nara	12%	13%	14%	→	→
6=	Lotte Department Store	13%	14%	14%	→	→
8	GS 25	11%	11%	11%	→	→
9	Hyundai Department store	8%	9%	9%	→	→
10	Wine Time	5%	4%	6%	→	↑
11=	Kim's Club	4%	4%	4%	→	→
11=	Galleria	3%	3%	4%	→	→
11=	AK Plaza	3%	2%	4%	→	↑
14=	7-Eleven	4%	4%	3%	→	→

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Consumption frequency

Wine consumption frequency in South Korea has remained stable over the past two years. The picture is similar across demographic groups

## Wine consumption frequency: Tracking

% who usually drink wine at the following frequency

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
Most days / every day	2%	1%	2%	→	→
2-5 times a week	15%	15%	17%	→	→
About once a week	22%	27%	24%	→	→
1-3 times a month	30%	30%	32%	→	→

## Wine consumption frequency: by generation

% who usually drink wine at the following frequency

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

	All South Korean semi-annual imported grape-based wine drinkers (n=1,004)	LDA-26 Gen Z (n=89)	27-42 Millennials (n=314)	43-58 Gen X (n=490)	59-64 Boomers (n=110)
Most days / every day	2%	2%	4%	2%	0%
2-5 times a week	17%	14%	24%	15%	11%
About once a week	24%	21%	22%	23%	36%
1-3 times a month	32%	37%	30%	34%	25%

% / %: Statistically significantly higher / lower than all semi-annual imported grape-based wine drinkers at a 95% confidence level

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Off-trade consumption frequency

Off-trade consumption frequency in South Korea has remained stable over the past two years, apart from an increase in drinking while relaxing at home

## Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
A relaxing drink at the end of the day at home	3.69	3.84	4.27	↑	→
With an informal meal at home	3.18	3.15	3.50	→	→
With a more formal dinner party at home	1.71	1.56	1.67	→	→
At a party / celebration at home	1.58	1.46	1.38	→	→

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

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

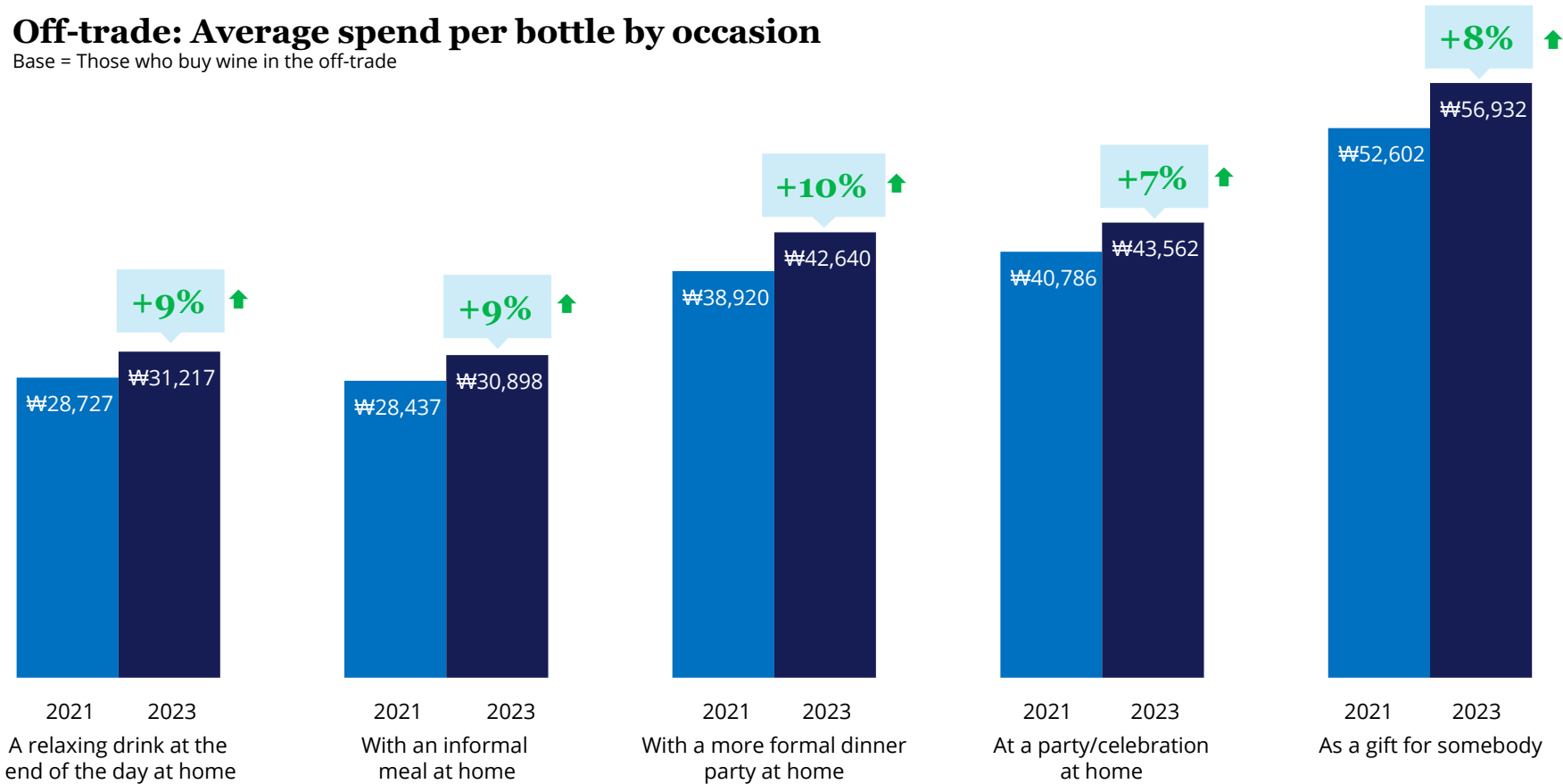
Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Average off-trade spend

Though off-trade consumption frequency in South Korea has remained broadly stable, the average spend per bottle has increased significantly across all off-trade occasions since 2021

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

Base = Those who buy wine in the off-trade



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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# On-trade consumption

The proportion of consumers who drink wine in the on-trade has increased significantly since 2021, in line with the easing of pandemic restrictions. This trend is seen across all demographic groups

## Market context

Due to its high prices, still wine is scarce in the traditional Korean restaurant channel, which is mainly dominated by cheaper local alcohol. Complicated storage requirements may also deter traditional restaurants from selling wine. Red wine can be difficult to pair with spicy Korean food.

*South Korea Executive Summary Report 2023*

## Wine purchase in on-trade

% who buy wine in a bar, pub, club, karaoke and restaurant

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

On-trade location		2021 (n=1,000)	2022 (n=1,004)	2023 (n=1,004)	Tracking	
					vs. '21	vs. '22
Bar or pub	Yes	33%	35%	38%	↑	→
	No	67%	65%	62%	↓	→
Restaurant	Yes	54%	57%	61%	↑	→
	No	46%	43%	39%	↓	→
Club or karaoke	Yes	6%	6%	9%	↑	↑
	No	94%	94%	91%	↓	↓
On-trade drinkers	Yes	60%	62%	66%	↑	→
	No	40%	38%	34%	↓	→

## Wine purchase in on-trade: by generation

% who buy wine in a bar, pub, club, karaoke and restaurant

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

On-trade location		All South Korean semi-annual imported grape- based wine drinkers (n=1,004)	LDA-26 Gen Z (n=89)	27-42 Millennials (n=314)	43-58 Gen X (n=490)	59-64 Boomers (n=110)
		Bar or pub	Yes	38%	60%	53%
No	62%		40%	47%	71%	79%
Restaurant	Yes	61%	83%	69%	54%	49%
	No	39%	17%	31%	46%	51%
Club or karaoke	Yes	9%	14%	18%	4%	2%
	No	91%	86%	82%	96%	98%
On-trade drinkers	Yes	66%	89%	75%	58%	53%
	No	34%	11%	25%	42%	47%

% / %: Statistically significantly higher / lower than all semi-annual imported grape-based wine drinkers at a 95% confidence level

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# On-trade consumption frequency

There has been a significant decline since 2021 in the number of times South Korean consumers drink on more formal on-trade occasions

## On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
A relaxing drink out at the end of the day	3.69	3.73	3.99	→	→
With an informal meal in a bar / pub / club / karaoke / restaurant	1.67	1.33	1.56	→	→
With a more formal dinner in a restaurant	1.78	1.50	1.46	↓	→
At a party / celebration / big night out	1.87	1.53	1.37	↓	→
During business lunch or dinner	1.79	1.59	2.02	→	↑

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

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

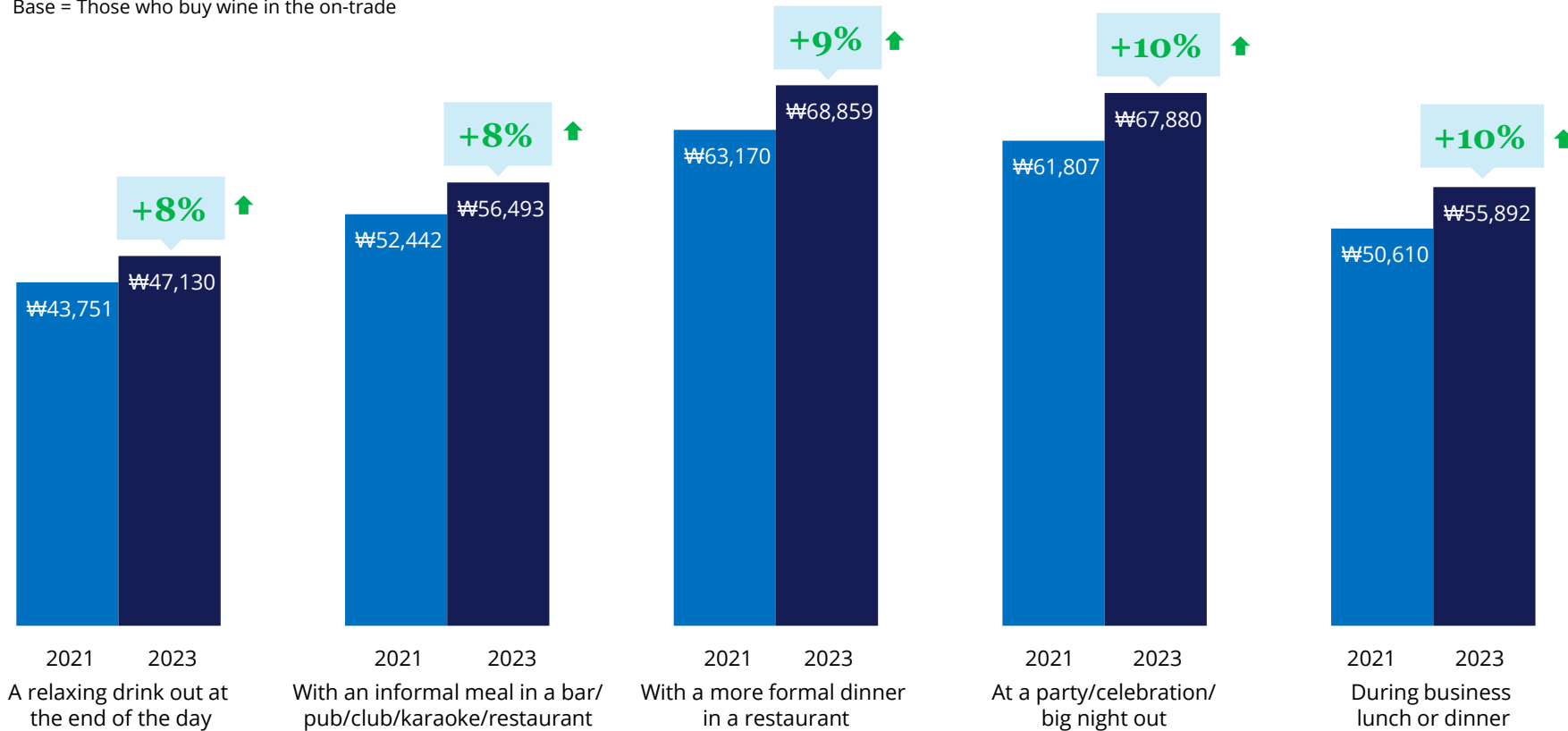
Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Typical on-trade spend

In line with the off-trade trend, the typical on-trade spend has increased significantly for all occasions since 2021, though consumption occasions have remained stable or declined

## On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# **Wine Views and Attitudes**

**South Korea Wine Landscapes**  
2023



# Attitudes towards wine

Attitudes towards wine have remained stable since 2021 apart from a decrease in the proportion of Korean wine drinkers who like to stick to what they know when drinking wine

## Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
I enjoy trying new and different styles of grape-based wine on a regular basis	33%	34%	35%	→	→
I don't mind what grape-based wine I buy so long as the price is right	49%	52%	52%	→	→
I know what grape-based wine I like and I tend to stick to what I know	19%	14%	12%	↓	→

## Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

	All South Korean semi-annual imported grape- based wine drinkers (n=1,004)	LDA-26 Gen Z (n=89)	27-42 Millennials (n=314)	43-58 Gen X (n=490)	59-64 Boomers (n=110)
I enjoy trying new and different styles of grape-based wine on a regular basis	35%	41%	41%	32%	29%
I don't mind what grape-based wine I buy so long as the price is right	52%	49%	48%	55%	55%
I know what grape-based wine I like and I tend to stick to what I know	12%	9%	12%	13%	16%

%/ %: Statistically significantly higher / lower than all semi-annual imported grape-based wine drinkers at a 95% confidence level

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Wine involvement

The proportion of Korean wine drinkers who are highly involved has increased significantly since 2021; the trend is not driven by any single age group

## Wine involvement: Tracking

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
High involvement	27%	34%	36%	↑	→
Medium involvement	31%	26%	28%	→	→
Low involvement	42%	40%	36%	↓	→

## Wine involvement by generation

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

	All South Korean semi-annual imported grape- based wine drinkers (n=1,004)	LDA-26 Gen Z (n=89)	27-42 Millennials (n=314)	43-58 Gen X (n=490)	59-64 Boomers (n=110)
High involvement	36%	40%	41%	33%	30%
Medium involvement	28%	30%	28%	28%	29%
Low involvement	36%	30%	30%	39%	41%

↑ / ↓ / %: Statistically significantly higher / lower than all semi-annual imported grape-based wine drinkers at a 95% confidence level

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Involvement and perceived expertise (1/2)

For nearly all involvement statements, the proportion of consumers who agree has increased since 2021; the leading statements include those around atmosphere and pleasure

## Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	Grape-based wine helps to create a warm / friendly atmosphere	73%	78%	78%	↑	→
2	Drinking grape-based wine gives me pleasure	68%	73%	74%	↑	→
3	I really love the taste of grape-based wine	61%	63%	64%	→	→
4	I always look for the best quality grape-based wines I can get for my budget	53%	58%	60%	↑	→
5	Drinking grape-based wine is good for my health	54%	57%	59%	↑	→
6	Grape-based wine can be a refreshing drink	52%	57%	56%	→	→
7	I have a strong interest in grape-based wine	49%	51%	55%	↑	→
8=	Deciding which grape-based wine to buy is an important decision	48%	50%	53%	↑	→
8=	Generally speaking, grape-based wine is an expensive drink	48%	50%	53%	↑	→
10=	Compared to others, I know less about the subject of grape-based wine	51%	53%	52%	→	→
10=	I like to take my time when I purchase a bottle of grape-based wine	44%	52%	52%	↑	→
12	Grape-based wine is important to me in my lifestyle	43%	49%	51%	↑	→
13	Grape-based wine is a fashionable drink	39%	47%	48%	↑	→
14	I don't understand much about grape-based wine	40%	42%	44%	→	→
15	Generally speaking, grape-based wine is reasonably priced	37%	42%	41%	↑	→
16	I feel competent about my knowledge of grape-based wine	23%	26%	29%	↑	→

### Market context

Many consumers are interested in experimenting with wine, which is perceived as a sophisticated and relatively healthy drink.

*South Korea Executive Summary Report 2023*

=Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Involvement and perceived expertise (2/2)

Higher involvement is driven by Gen Z and Millennial consumers; higher proportions of each group than Korean wine drinkers in general agree with more involvement statements

## Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

Ranking '23	All South Korean semi-annual imported grape- based wine drinkers (n=1,004)	LDA-26 Gen Z (n=89)	27-42 Millennials (n=314)	43-58 Gen X (n=490)	59-64 Boomers (n=110)	
1	Grape-based wine helps to create a warm / friendly atmosphere	78%	77%	76%	79%	80%
2	Drinking grape-based wine gives me pleasure	74%	79%	75%	73%	75%
3	I really love the taste of grape-based wine	64%	66%	69%	62%	56%
4	I always look for the best quality grape-based wines I can get for my budget	60%	63%	68%	57%	51%
5	Drinking grape-based wine is good for my health	59%	50%	60%	59%	62%
6	Grape-based wine can be a refreshing drink	56%	74%	58%	53%	51%
7	I have a strong interest in grape-based wine	55%	52%	62%	53%	50%
8=	Deciding which grape-based wine to buy is an important decision	53%	64%	57%	48%	54%
8=	Generally speaking, grape-based wine is an expensive drink	53%	71%	53%	51%	44%
10=	Compared to others, I know less about the subject of grape-based wine	52%	61%	51%	52%	53%
10=	I like to take my time when I purchase a bottle of grape-based wine	52%	66%	59%	47%	46%
12	Grape-based wine is important to me in my lifestyle	51%	55%	55%	49%	46%
13	Grape-based wine is a fashionable drink	48%	46%	47%	51%	46%
14	I don't understand much about grape-based wine	44%	42%	46%	43%	47%
15	Generally speaking, grape-based wine is reasonably priced	41%	45%	49%	36%	39%
16	I feel competent about my knowledge of grape-based wine	29%	36%	37%	24%	19%

=Represents equal ranking

% / %: Statistically significantly higher / lower than all semi-annual imported grape-based wine drinkers at a 95% confidence level  
Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers

# Wine knowledge and confidence

In line with higher involvement levels, wine knowledge has increased significantly since 2021 though confidence is more flat

## Wine knowledge index: Tracking

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
Knowledge Index	25.5	27.0	27.2	↑	→

+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 South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

	2021	2022	2023	Tracking	
	(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
Confidence Index	42.3	42.9	43.4	→	→

+1.1  
Index  
change

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

\*\*Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Wine-drinking motivations

Different age groups drink wine for similar reasons; one exception is a lower proportion of younger people than wine drinkers in general who feel wine is good for their health

## Wine drinking motivations: by generation

% who selected the following as reasons why they drink wine

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

Ranking '23	All South Korean semi-annual imported grape-based wine drinkers (n=1,004)	LDA-26 Gen Z (n=89)	27-42 Millennials (n=314)	43-58 Gen X (n=490)	59-64 Boomers (n=110)	
1	To celebrate special occasions	56%	57%	53%	56%	64%
2	Wine enhances food and meals	52%	55%	47%	53%	61%
3=	Drinking wine makes me feel relaxed	47%	45%	42%	51%	48%
3=	Wine helps create a warm / friendly atmosphere	47%	41%	44%	48%	60%
5	Wine is about sharing with a partner / close friend or family member	42%	46%	39%	42%	52%
6=	I really love the taste of wine	33%	36%	36%	32%	26%
6=	Drinking wine can be good for my health	33%	22%	26%	37%	45%
6=	I treat myself with wine at the end of the day	33%	34%	35%	33%	26%
6=	Wine is about sharing something with others	33%	39%	34%	29%	38%
10	It makes me feel individual and unique	32%	37%	35%	31%	29%
11	I like shopping / choosing wines to drink	28%	28%	31%	26%	24%
12	It makes people sophisticated	24%	33%	29%	20%	22%
13=	Wine is a fashionable drink	21%	36%	26%	16%	18%
13=	I like learning about new wines	21%	34%	24%	18%	17%
15=	Most of my friends drink wine	15%	17%	19%	14%	11%
15=	Wine is a refreshing drink	15%	23%	15%	13%	15%

= Represents equal ranking

% / %: Statistically significantly higher / lower than all semi-annual imported grape-based wine drinkers at a 95% confidence level  
Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers

# Wine-buying choice cues

In line with higher involvement levels, a greater proportion of South Korean wine drinkers than in 2021 say multiple factors are important when buying wine, including region of origin, brand and variety

## Wine choice cues: Tracking

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

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	Wine that matches or complements food	83%	85%	85%	→	→
2	Taste or wine style descriptions displayed on the shelves or on wine labels	71%	73%	75%	→	→
3	Recommendation by friend or family	69%	73%	72%	→	→
4	The country of origin	64%	67%	71%	↑	→
5=	The region of origin	61%	64%	69%	↑	↑
5=	Promotional offer	66%	64%	69%	→	↑
5=	A brand I am aware of	65%	68%	69%	↑	→
5=	Grape variety	62%	66%	69%	↑	→
9	Recommendation by wine critic or writer	63%	63%	63%	→	→
10	Alcohol content	58%	59%	62%	→	→
11	Recommendations from shop staff or shop leaflets	55%	58%	61%	↑	→
12	Recommendation by wine guide books	54%	55%	56%	→	→
13	Appeal of the bottle and / or label design	39%	47%	50%	↑	→
14	Whether or not the wine has won a medal or award	35%	36%	43%	↑	↑

= Represents equal ranking

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

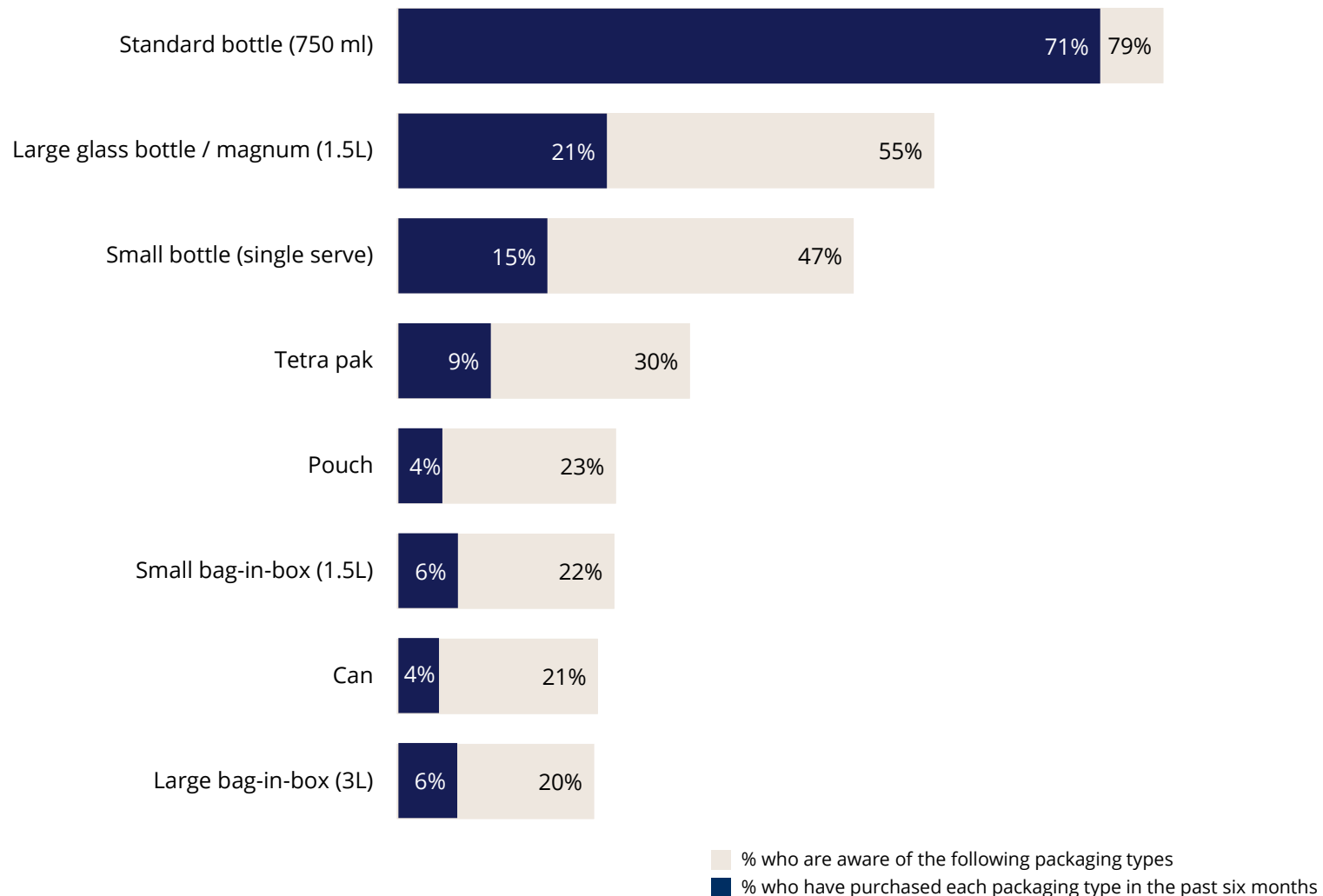
Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Packaging type awareness and purchase

After standard bottles, larger and smaller bottle formats are the most well-known among South Korean wine drinkers

## Packaging types: Awareness and purchase levels

% of those who are aware of or have purchased wine in the following packaging types  
Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers



# Packaging purchase

Packaging purchase rates have remained broadly stable over the past year. There are higher purchase rates for small bottles, pouches and cans among Millennials than South Korean wine drinkers in general

## Packaging purchase: Tracking

% who have purchased wine in the following packaging types

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,004)

Ranking '23		2022 (n=1,004)	2023 (n=1,004)	Tracking vs. '22
1	Standard bottle (750 ml)	71%	71%	→
2	Large glass bottle / magnum (1.5L)	24%	21%	→
3	Small bottle (single serve)	15%	15%	→
4	Tetra pak	11%	9%	→
5=	Small bag-in-box (1.5L)	6%	6%	→
5=	Large bag-in-box (3L)	6%	6%	→
7=	Pouch	6%	4%	→
7=	Can	5%	4%	→

## Packaging purchase: by generation

% who have purchased wine in the following packaging types

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

Ranking '23		All South Korean semi-annual imported grape- based wine drinkers (n=1,004)	LDA-26 Gen Z (n=89)	27-42 Millennials (n=314)	43-58 Gen X (n=490)	59-64 Boomers (n=110)
1	Standard bottle (750 ml)	71%	75%	69%	72%	74%
2	Large glass bottle / magnum (1.5L)	21%	27%	26%	19%	15%
3	Small bottle (single serve)	15%	21%	21%	11%	10%
4	Tetra pak	9%	14%	13%	7%	6%
5=	Small bag-in-box (1.5L)	6%	11%	8%	5%	2%
5=	Large bag-in-box (3L)	6%	5%	9%	5%	3%
7=	Pouch	4%	3%	10%	2%	0%
7=	Can	4%	4%	9%	2%	1%

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Apr '22, Apr '23, (n≥1,004) South Korean semi-annual imported grape-based wine drinkers

# **Hot Topic: Consumer Sentiment**

**South Korea Wine Landscapes**  
2023

# Consumer sentiment

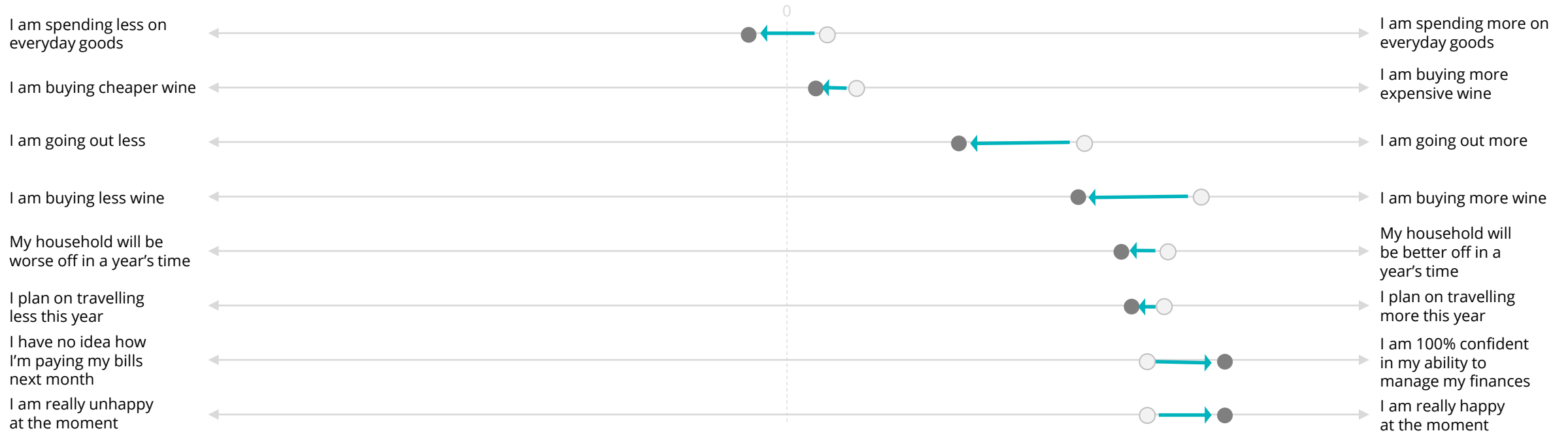
South Korean respondents remain confident about their finances and are generally happy, but are buying less wine than in 2022; signs of down-trading could demonstrate unease about the economic situation

## Consumer sentiment: tracked

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement

Minimum value: -4%, Maximum value: 51%

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)



○ : 2022, ● : 2023

Source: Wine Intelligence, Vinitrac®, South Korea, Apr '22, Apr '23, (n≥1,004) South Korean semi-annual imported grape-based wine drinkers

## HOT TOPIC

# Consumer sentiment

Both Gen X and Boomer wine drinkers in South Korea are buying cheaper wine; this could be due to their lower confidence than younger age groups about future household finances

### Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement

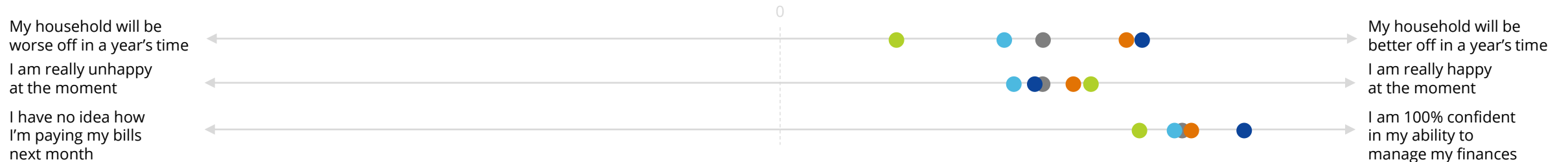
Minimum value: -13%, Maximum value: 59%

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

#### Wine behaviour



#### Finance and well-being



● Gen Z ● Millennials ● Gen X ● Boomers  
● All sample

Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers

## HOT TOPIC

# Consumer sentiment

Younger drinkers are likely to go out more; Millennials have the highest net score for spending when out; older people are down-trading on everyday goods, perhaps showing that economic pressure is affecting them most

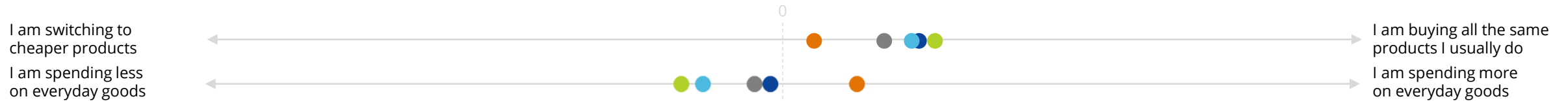
## Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement

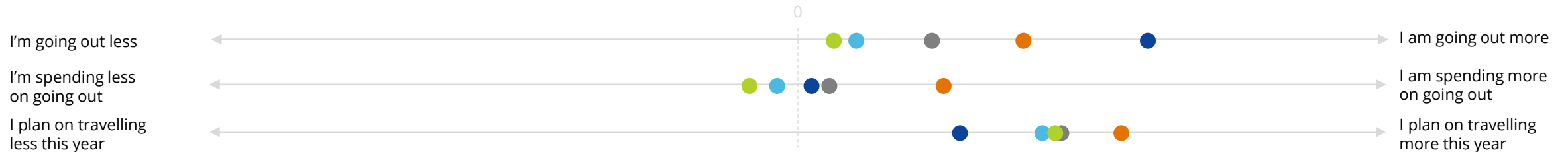
Minimum value: -13%, Maximum value: 59%

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

### Off-trade behaviours



### On-trade and travel



● Gen Z ● Millennials ● Gen X ● Boomers  
● All sample

Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers

# **Hot Topic: Wine Closures**

## **South Korea Wine Landscapes**

2023

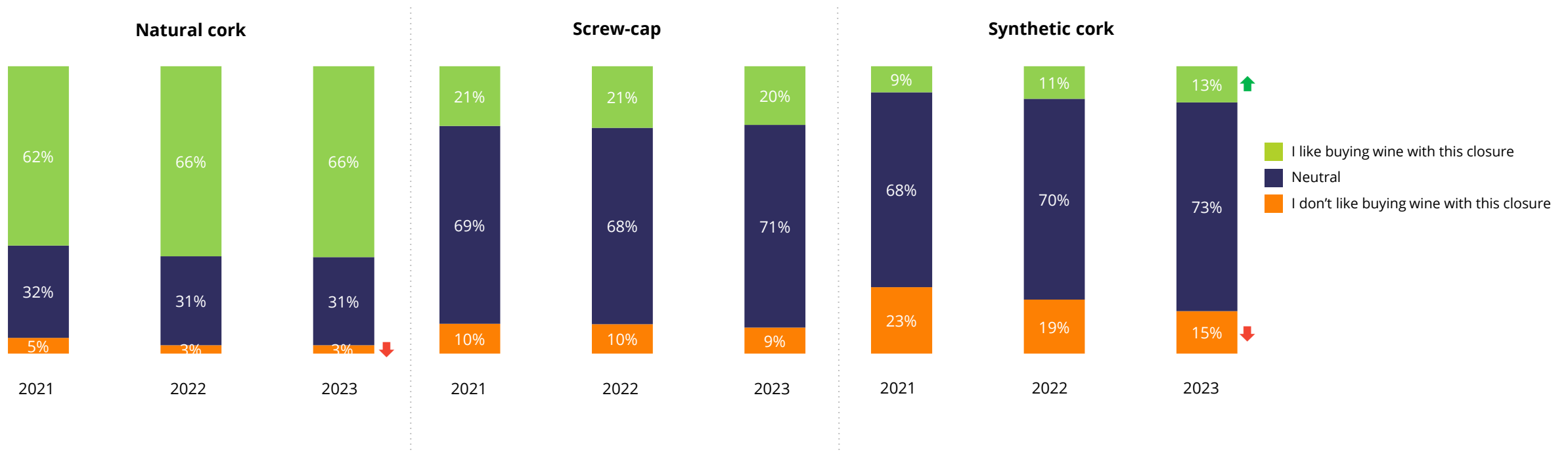
# Wine closures

Natural cork remains the most popular wine closure by far in South Korea; a significantly greater proportion of respondents like buying wine with synthetic cork closures than in 2021

## Views on wine closures

% who 'agree' or 'strongly agree' with the following statements

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)



↑/↓: Statistically significantly higher / lower than the Mar '21 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

## HOT TOPIC

# Views on wine closure types

Natural corks are perceived as trustworthy, high quality and good for special occasions, but also outdated. Screw-caps are viewed as modern, practical and good for everyday drinking. Synthetic corks are broadly seen as cheap and low quality

## Wine closure types imagery

% who associate the following statements with each type of wine closure

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

	Natural cork (n=1,004)	Screw-cap (n=1,004)	Synthetic cork (n=1,004)
Practical	16%	50%	30%
Affordable	9%	41%	37%
Trustworthy	59%	15%	14%
Sustainable	41%	27%	18%
High quality	62%	13%	11%
Modern	27%	35%	23%
Traditional	67%	8%	8%
Opening a wine with this type of closure gives me pleasure	57%	13%	13%
Good for everyday drinking	19%	44%	18%
Recyclable	23%	39%	18%
Good for special occasions	54%	13%	11%
Innovative	17%	38%	20%
Cheap	8%	28%	33%
Outdated	44%	10%	13%
Low quality	5%	25%	35%
None of the above	11%	6%	6%

Green / turquoise: Statistically significantly higher than 2 / 1 wine closure types at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers



# **Brand Health**

## **South Korea Wine Landscapes**

2023

# Global Wine Brand Power Index

Brand health measures included in the index

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



# South Korea Brand Power

1865 holds on to its top spot in the 2023 South Korea Brand Power Index, with G7 and Casillero del Diablo in second and third

1865

1<sup>st</sup>

G7  
THE 7<sup>th</sup> GENERATION  
Wine of Chile

2<sup>nd</sup>

Casillero  
del  
Diablo

3<sup>rd</sup>

# South Korean Brand Power Index 2023

The 1865 brand achieved the highest score across all our brand health metrics

## South Korean Brand Power Index

The top 30 most powerful wine brands in the South Korea market based on consumer feedback from six key brand health measures

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)

Ranking '23	Final Index	Tracking vs 2022	Score difference vs 2022	
1	1865	100.0	=	0.0
2	G7	80.8	↑+1	4.2
3	Casillero del Diablo	78.9	↓-1	-0.6
4	Yellow Tail	68.9	=	0.9
5	Carmen	64.2	=	-1.7
6	Villa M	59.7	=	-1.0
7	Gallo Family Vineyards	55.4	↑+3	5.8
8	Montes	54.6	=	-2.1
9	Montes Alpha	54.0	=	0.2
10	Cono Sur	50.3	↑+4	5.2
11	Wolf Blass	48.4	↑+7	4.5
12	Gracia de Chile	47.7	↑+18	10.3
13	San Pedro	47.1	↑+7	4.0
14	Sunrise	45.8	↑+8	4.2
15	Don Melchor	45.5	↑+2	1.4

Ranking '23	Final Index	Tracking vs 2022	Score difference vs 2022	
16	Escudo Rojo	45.1	↑+5	2.1
17	Blue Nun	42.9	↑+9	3.7
18	Castillo de Molina	42.3	↓-2	-2.0
19=	Barefoot	42.2	↑+13	6.7
19=	Mouton Cadet	42.2	↓-9	-4.9
21	Les Dauphins	42.1	↓-2	-1.5
22	Carlo Rossi	40.8	↓-10	-5.3
23	Catena	40.1	↑+18	9.9
24	Marques de Casa Concha	39.2	↑+1	-0.1
25	Lapostolle	38.5	↑+9	3.4
26	Santa Rita	38.5	↓-13	-6.9
27	Brown Brothers	38.4	↓-12	-6.0
28	Hardys	37.7	↑+3	0.5
29	Santa Helena	37.4	↓-6	-4.1
30	Frontera Specialties	37.0	↑+7	4.1

= Represents equal ranking

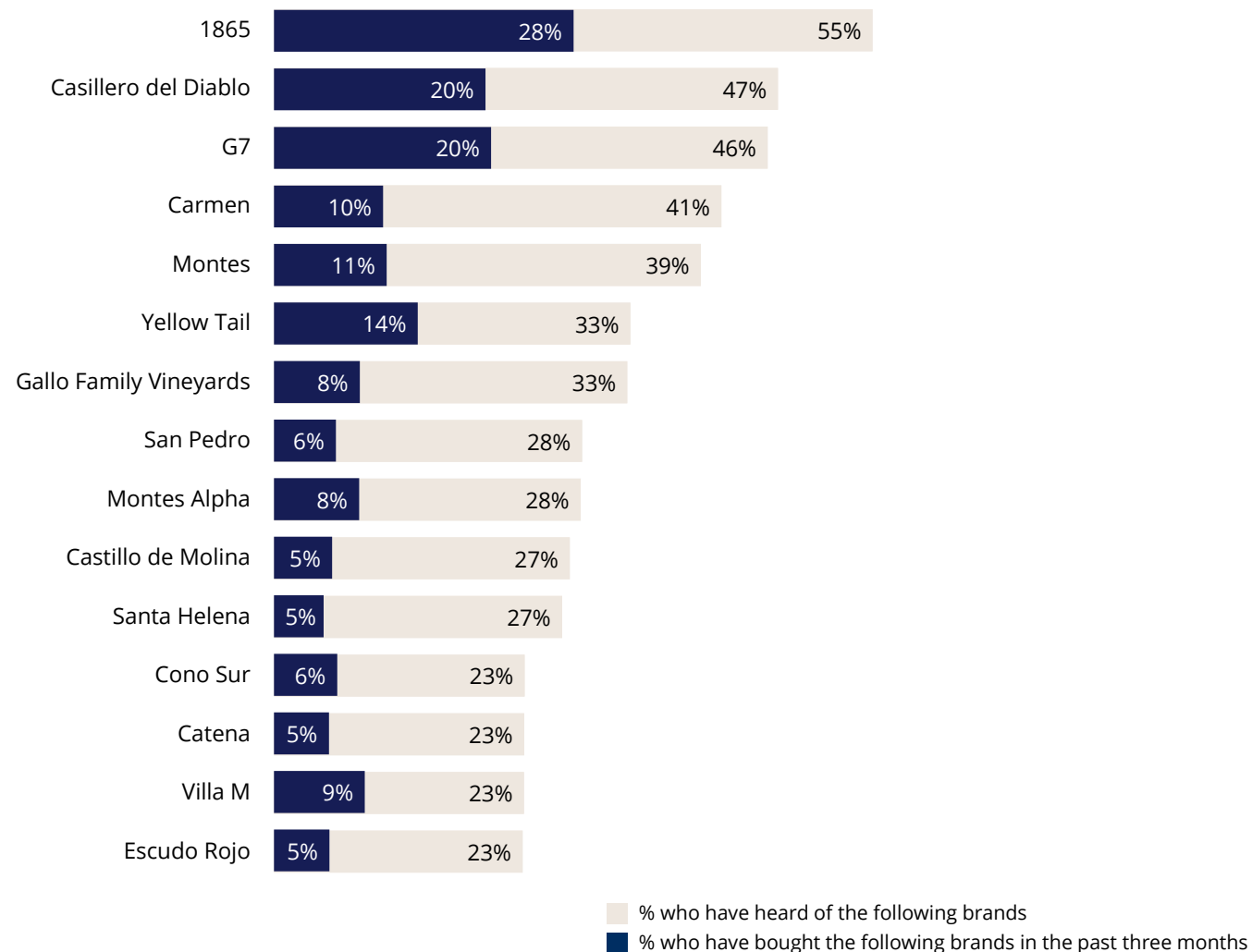
Source: Wine Intelligence, Vinitrac®, South Korea, Feb '22, Apr '23,(n≥1,004) South Korean semi-annual imported grape-based wine drinkers

# Brand health: Awareness and consumption

Brand awareness and purchase rates are low in general in the South Korean wine market

## Brand health: Top 15 awareness and consumption levels

Base = All South Korean semi-annual imported grape-based wine drinkers (n=1,004)



Source: Wine Intelligence, Vinitrac®, South Korea, Apr '23, (n=1,004) South Korean semi-annual imported grape-based wine drinkers

# Brand awareness: Tracking

Brand awareness has increased for some top brands in the South Korean wine market since 2021, most notably G7, Yellow Tail and Gallo Family Vineyards

## Awareness: Tracking

% who have heard of the following brands

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	1865	49%	52%	55%	↑	→
2	Casillero del Diablo	41%	45%	47%	↑	→
3	G7	32%	38%	46%	↑	↑
4	Carmen	40%	40%	41%	→	→
5	Montes	36%	36%	39%	→	→
6=	Yellow Tail	24%	26%	33%	↑	↑
6=	Gallo Family Vineyards	24%	27%	33%	↑	↑
8=	San Pedro	26%	30%	28%	→	→
8=	Montes Alpha	25%	28%	28%	→	→
10=	Castillo de Molina	30%	27%	27%	→	→
10=	Santa Helena	22%	27%	27%	↑	→
12=	Cono Sur	16%	20%	23%	↑	→
12=	Catena	23%	23%	23%	→	→
12=	Villa M	19%	22%	23%	↑	→
12=	Escudo Rojo	21%	21%	23%	→	→

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
12=	Marques de Casa Concha	20%	20%	23%	→	→
17=	Mouton Cadet	21%	22%	22%	→	→
17=	Wolf Blass	18%	19%	22%	↑	→
19=	Sunrise	19%	21%	21%	→	→
19=	Carlo Rossi	22%	24%	21%	→	→
19=	Gato Negro	20%	21%	21%	→	→
22	Les Dauphins	17%	18%	20%	↑	→
23=	Gracia de Chile	18%	20%	19%	→	→
23=	Frontera	18%	19%	19%	→	→
23=	Santa Rita	20%	18%	19%	→	→
26=	Don Melchor	18%	18%	18%	→	→
26=	Lapostolle	16%	17%	18%	→	→
28=	Brown Brothers	15%	15%	17%	→	→
28=	Frontera Specialties	16%	16%	17%	→	→
30	Barefoot	14%	13%	16%	→	→

Results for all brands available in the data table

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Brand purchase: Tracking

Higher awareness has not translated into greater purchase rates for brands in the South Korean market, apart from G7 which has seen a significant increase in this measure since 2021

## Purchase: Tracking

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

Base = All South Korean semi-annual imported grape-based wine drinkers (n≥1,000)

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
1	1865	26%	26%	28%	→	→
2=	G7	16%	16%	20%	↑	↑
2=	Casillero del Diablo	17%	19%	20%	→	→
4	Yellow Tail	12%	11%	14%	→	→
5	Montes	9%	10%	11%	→	→
6	Carmen	11%	12%	10%	→	→
7	Villa M	7%	9%	9%	→	→
8=	Gallo Family Vineyards	6%	7%	8%	→	→
8=	Montes Alpha	8%	10%	8%	→	→
10	Wolf Blass	5%	5%	7%	→	→
11=	Cono Sur	4%	6%	6%	→	→
11=	San Pedro	6%	7%	6%	→	→
11=	Gracia de Chile	5%	5%	6%	→	→
14=	Don Melchor	6%	4%	5%	→	→
14=	Castillo de Molina	7%	7%	5%	→	→

Ranking '23		2021	2022	2023	Tracking	
		(n=1,000)	(n=1,004)	(n=1,004)	vs. '21	vs. '22
14=	Carlo Rossi	4%	6%	5%	→	→
14=	Escudo Rojo	5%	6%	5%	→	→
14=	Catena	5%	5%	5%	→	→
14=	Santa Rita	5%	5%	5%	→	→
14=	Sunrise	6%	5%	5%	→	→
14=	Marques de Casa Concha	5%	5%	5%	→	→
14=	Santa Helena	5%	5%	5%	→	→
23=	Les Dauphins	5%	5%	4%	→	→
23=	Mouton Cadet	6%	5%	4%	↓	→
23=	Blue Nun	4%	4%	4%	→	→
23=	Frontera Specialties	5%	4%	4%	→	→
23=	Gato Negro	4%	5%	4%	→	→
23=	Brown Brothers	4%	4%	4%	→	→
29=	Hardys	4%	3%	3%	→	→
29=	Frontera	4%	4%	3%	→	→

Results for all brands available in the data table

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Brand conversion: Tracking

Conversion rates have remained stable in South Korea over the past two years, apart from for Yellow Tail which has seen a decrease in this measure since 2021

## Conversion: Tracking

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

Base = Those who have heard of each brand

Ranking '23		2021	2022	2023	Tracking	
					vs. '21	vs. '22
1	1865	52%	50%	51%	→	→
2	G7	49%	42%	45%	→	→
3	Casillero del Diablo	41%	42%	43%	→	→
4	Yellow Tail	50%	42%	41%	↓	→
5	Villa M	37%	40%	37%	→	→
6	Blue Nun	25%	28%	31%	→	→
7=	Wolf Blass	26%	28%	30%	→	→
7=	Don Melchor	30%	25%	30%	→	→
7=	Gracia de Chile	27%	23%	30%	→	→
10	Montes Alpha	33%	35%	28%	→	→
11=	Santa Rita	26%	25%	27%	→	→
11=	Montes	26%	29%	27%	→	→
13	Cono Sur	28%	30%	26%	→	→
14=	Carlo Rossi	20%	26%	25%	→	→
14=	Carmen	27%	30%	25%	→	→

Ranking '23		2021	2022	2023	Tracking	
					vs. '21	vs. '22
14=	Gallo Family Vineyards	26%	27%	25%	→	→
17=	Sunrise	29%	24%	24%	→	→
17=	Frontera Specialties	29%	26%	24%	→	→
19=	Hardys	22%	19%	23%	→	→
19=	Escudo Rojo	25%	27%	23%	→	→
19=	Marques de Casa Concha	22%	27%	23%	→	→
22=	Catena	21%	23%	22%	→	→
22=	Brown Brothers	30%	29%	22%	→	→
22=	U by Undurraga	23%	26%	22%	→	→
22=	Les Dauphins	27%	26%	22%	→	→
26=	Roche Mazet	n/a	22%	21%	n/a	→
26=	McGuigan	n/a	28%	21%	n/a	→
26=	Barefoot	28%	29%	21%	→	→
29=	San Pedro	23%	22%	20%	→	→
29=	Castillo de Molina	25%	27%	20%	→	→

Results for all brands available in the data table

= 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®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers



# Brand consideration: Tracking

In line with purchase incidences, consideration for buying brands has remained stable throughout the Korean market since 2021

## Consideration: Tracking

% who would consider buying the following brands

Base = Those who have heard of each brand

Ranking '23		2021	2022	2023	Tracking	
					vs. '21	vs. '22
1	1865	58%	58%	56%	→	→
2	Yellow Tail	50%	48%	48%	→	→
3	G7	44%	41%	44%	→	→
4	Villa M	37%	40%	43%	→	→
5	Casillero del Diablo	40%	44%	42%	→	→
6	Montes Alpha	40%	40%	39%	→	→
7=	Blue Nun	29%	31%	38%	→	→
7=	Cono Sur	34%	36%	38%	→	→
7=	Carmen	33%	41%	38%	→	→
10	Gracia de Chile	30%	32%	36%	→	→
11	Wolf Blass	37%	37%	35%	→	→
12=	Don Melchor	34%	37%	34%	→	→
12=	Sunrise	32%	35%	34%	→	→
14=	Gallo Family Vineyards	29%	32%	33%	→	→
14=	Escudo Rojo	34%	36%	33%	→	→

Ranking '23		2021	2022	2023	Tracking	
					vs. '21	vs. '22
14=	Les Dauphins	35%	38%	33%	→	→
17=	Mouton Cadet	31%	34%	32%	→	→
17=	Barefoot	29%	34%	32%	→	→
17=	Lapostolle	41%	35%	32%	→	→
17=	McGuigan	n/a	26%	32%	n/a	→
21=	Hardys	30%	33%	31%	→	→
21=	Santa Rita	35%	32%	31%	→	→
21=	San Pedro	33%	31%	31%	→	→
24	Brown Brothers	41%	34%	30%	↓	→
25	Roche Mazet	n/a	22%	29%	n/a	→
26=	Montes	26%	36%	28%	→	↓
26=	Carlo Rossi	26%	37%	28%	→	↓
28=	Concha y Toro	25%	32%	27%	→	→
28=	Frontera Specialties	30%	30%	27%	→	→
28=	Lindeman's	27%	30%	27%	→	→

Results for all brands available in the data table

= 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®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Brand affinity: Tracking

In line with other measures, brand affinity has remained stable since 2021

## Affinity: Tracking

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

Ranking '23		2021	2022	2023	Tracking	
					vs. '21	vs. '22
1	1865	47%	48%	47%	→	→
2	G7	37%	37%	42%	→	→
3	Yellow Tail	40%	38%	39%	→	→
4	Villa M	35%	37%	38%	→	→
5	Casillero del Diablo	34%	35%	37%	→	→
6	Gracia de Chile	26%	28%	35%	→	→
7	Cono Sur	29%	33%	33%	→	→
8	Carmen	29%	33%	32%	→	→
9=	Barefoot	28%	30%	31%	→	→
9=	Gallo Family Vineyards	22%	27%	31%	↑	→
11=	Don Melchor	25%	31%	30%	→	→
11=	Sunrise	24%	28%	30%	→	→
11=	Montes Alpha	31%	37%	30%	→	→
14=	Blue Nun	25%	23%	29%	→	→
14=	Wolf Blass	28%	28%	29%	→	→

Ranking '23		2021	2022	2023	Tracking	
					vs. '21	vs. '22
16	Escudo Rojo	26%	25%	27%	→	→
17	McGuigan	n/a	24%	26%	n/a	→
18=	Carlo Rossi	23%	29%	25%	→	→
18=	Mouton Cadet	29%	30%	25%	→	→
18=	Lapostolle	29%	27%	25%	→	→
18=	San Pedro	21%	25%	25%	→	→
18=	Lindeman's	16%	24%	25%	→	→
18=	U by Undurraga	19%	24%	25%	→	→
24=	Hardys	26%	26%	24%	→	→
24=	Penfolds	17%	24%	24%	→	→
24=	Frontera Specialties	26%	24%	24%	→	→
24=	Catena	17%	24%	24%	→	→
28=	Frontera	19%	26%	23%	→	→
28=	Brown Brothers	31%	26%	23%	→	→
28=	Les Dauphins	36%	28%	23%	↓	→

Results for all brands available in the data table

= 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®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# Brand recommendation: Tracking

Brand recommendation has remained stable in South Korea since 2021

## Recommendation: Tracking

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

Ranking '23		2021	2022	2023	Tracking	
					vs. '21	vs. '22
1	1865	49%	51%	47%	→	→
2	Villa M	35%	38%	42%	→	→
3	Casillero del Diablo	34%	34%	37%	→	→
4=	G7	36%	34%	35%	→	→
4=	Yellow Tail	39%	36%	35%	→	→
6	Barefoot	25%	27%	31%	→	→
7=	Carmen	28%	32%	30%	→	→
7=	Blue Nun	24%	30%	30%	→	→
9=	Don Melchor	27%	27%	29%	→	→
9=	Gallo Family Vineyards	25%	23%	29%	→	→
9=	Les Dauphins	28%	29%	29%	→	→
9=	Montes Alpha	33%	33%	29%	→	→
13	Wolf Blass	29%	30%	28%	→	→
14=	Cono Sur	26%	34%	27%	→	→
14=	Sunrise	27%	29%	27%	→	→

Ranking '23		2021	2022	2023	Tracking	
					vs. '21	vs. '22
16=	Gracia de Chile	25%	25%	26%	→	→
16=	Hardys	26%	21%	26%	→	→
18=	Escudo Rojo	28%	29%	25%	→	→
18=	Brown Brothers	30%	31%	25%	→	→
20	San Pedro	21%	26%	24%	→	→
21=	Lapostolle	32%	29%	23%	↓	→
21=	Santa Rita	23%	21%	23%	→	→
23=	Mouton Cadet	26%	25%	22%	→	→
23=	Frontera Specialties	22%	23%	22%	→	→
25=	Gato Negro	17%	15%	21%	→	→
25=	Marques de Casa Concha	21%	30%	21%	→	↓
25=	Montes	26%	25%	21%	→	→
25=	Carta Vieja	17%	22%	21%	→	→
29=	Penfolds	22%	20%	20%	→	→
29=	Roche Mazet	n/a	23%	20%	n/a	→

Results for all brands available in the data table

= 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®, South Korea, Mar '21, Apr '22, Apr '23, (n≥1,000) South Korean semi-annual imported grape-based wine drinkers

# **Research Methodology**

**South Korea Wine Landscapes**

2023

# Research methodology

## QUANTITATIVE

Data was collected in South Korea since October 2012.

The March 2021 and April 2022 waves were tracked against April 2023.

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

Respondents were screened to ensure that they: were 19-64 years old; drank imported grape-based red, white or rosé wine at least twice a year; 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 South Korean semi-annual imported grape-based wine drinkers in terms of age and gender

The distribution of the sample is shown in the table.

		<i>Mar-21</i>	<i>Apr-22</i>	<i>Apr-23</i>
	<i>n=</i>	<i>1000</i>	<i>1004</i>	<i>1004</i>
<b>Gender</b>	Male	46%	50%	48%
	Female	54%	50%	52%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Age</b>	19-24	11%	6%	5%
	25-29	8%	7%	10%
	30-34	9%	9%	9%
	35-39	13%	11%	10%
	40-44	11%	12%	13%
	45-49	16%	14%	11%
	50-64	31%	41%	43%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Wine Intelligence, Vinitrac® South Korea, March 2021 - April 2023 (n≥1,000) South Korean semi-annual imported grape-based wine drinkers



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