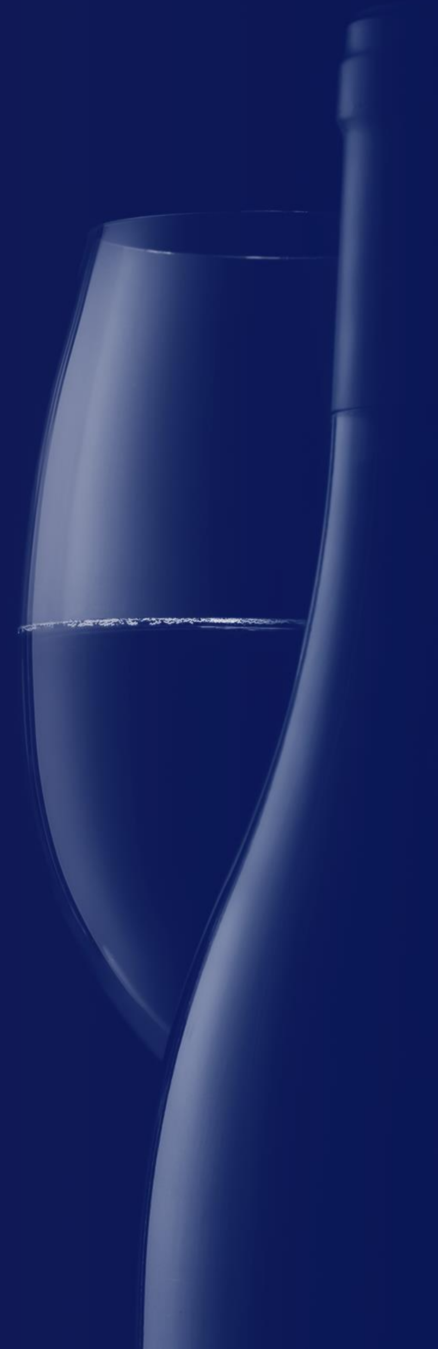
IWSR drinks market analysis

Opportunities in Sustainable, Organic and Alternative Wine

2024



Contents

IWSR viewpoint

Alternative wines – in a pessimistic wine landscape and under growing economic pressure – continue to offer opportunities for growth, driven by younger wine drinkers who have connected with the category on quality terms

Climate change remains a core concern: while most countries haven't experienced major shifts in attitudes, in the US – where the health and wellness trend is displacing ecological concern – fewer regular wine drinkers (RWDs) show a high engagement with sustainability. This has impacted consumer willingness to choose and spend more on eco-friendly products.

With growing economic pressure, wine drinkers willing to spend more and choose sustainable wines when possible has dwindled in the past year in Australia and the UK as well as the US, remaining stable in Canada and growing share among upper-middle-class semi-annual drinkers of imported wine in China.

On the bright side, the Opportunity Index, a combined measure of awareness, purchases, consideration and affinity, has grown across wine types and most markets in the past year, driven by a slight increase across measures. This is in line with market data, which shows growth of organic wine in the past five years.

Natural and organic wines dominate the index, with natural wine showing the highest rate of awareness-to-purchase conversion, particularly popular among younger wine drinkers. In addition, Canada stands out in its continuous increase of wine drinkers purchasing natural wines.

The Fairtrade designation, particularly strong in the UK, is losing consumer awareness, as young wine drinkers new to the category are not aware of this certification. While purchase levels are stable for now, demand could be impacted in the future if awareness among wine drinkers continues to decline.

The growth and resilience of alternative wines despite the challenging wine landscape lies in their strong perceived association with higher-quality and 'better-for-you' wines. Younger cohorts, particularly Millennials – the main buyers of alternative wines – associate natural and organic wines with better quality.

While sustainability and climate concerns are important drivers of purchase for these categories, the alternative wine audience has also connected on quality. Combining this factor with the growing trend for purchasing less but better, spending on alternative wines is easier for consumers to justify.

Opportunities

- Natural wine awareness remains low
- Millennials open to alternative wines
- Association with higher quality driving purchases
- Health and wellness trend ongoing

Threats

- Sustainability becoming less decisive
- Inflation impacting spend
- Fairtrade losing popularity
- Lack of high-quality association among older age groups

Management summary

Management summary

Key takeaways

1. Opportunities for alternative wines remain on the rise

Despite economic pressure, the Opportunity Index has increased in the past year across wine types.

2. Natural wine improving the most across markets

Driven by an increase across metrics, natural wine has improved its Opportunity Index, especially in Portugal, New Zealand and Hong Kong.

3. Climate concerns not enough to justify spend

Sustainability remains important for wine drinkers, however, the number of those willing to purchase sustainable wines has decreased in the past year in Australia, the UK and the US.

4. Perceived quality is the key purchase driver

Perceived quality is a key driver of choice. Wines with quality recognition or perceived as higher quality are more likely to be purchased.

5. Associations with quality are stronger among younger buyers

A growing number of younger wine drinkers, the most important buyers of alternative wines, associate organic and natural wine with better quality.

6. Millennials driving growth

Among age cohorts, Millennials are the group most engaged with alternative wines, purchasing more types of alternative wine.

1. Opportunities remain on the rise

Despite the challenging wine landscape, opportunities for alternative wines remain strong. The Opportunity Index has increased across alternative wines due to an overall improvement across metrics, with natural, organic and sustainably produced wines dominating the rankings.

The Opportunity Index for Fairtrade wine has remained stable in the past year, overtaken by preservative-free wine. In countries like the UK, where Fairtrade has a strong presence, awareness has decreased – particularly among young drinkers.

Global Alternative Wine Opportunity Index 2024*

		Index score 2024	Score change		Rank change	
			vs 2022	vs 2023	vs 2022	vs 2023
1	Natural wine	**58.5**	5.6	4.8	=	=
2	Organic wine	**54.2**	4.8	3.7	=	=
3	Sustainably produced wine	**49.5**	4.1	2.8	=	=
4	Environmentally friendly wine	**46.3**	3.0	1.8	=	=
5	Preservative-free wine	**43.2**	4.3	2.1	1↑	1↑
6	Fairtrade wine	**41.8**	2.1	0.1	1↓	1↓
7	Wine from a carbon-neutral winery	**40.7**	3.7	2.6	=	=
8	Sulphite-free wine	**37.5**	2.6	1.8	=	=
9	Pét nat (pétillant naturel)	**37.1**	4.0	3.2	=	1↑
10	Orange/skin-contact wine	**35.9**	4.4	1.5	1↑	1↓
11	Biodynamic wine	**34.6**	2.7	0.8	1↓	=
12	Vegan wine	**30.5**	3.0	0.5	1↑	=
13	Vegetarian wine	**29.5**	1.7	0.3	1↓	=

Note: The Opportunity Index scores might differ from 2023 report as the markets covered in 2024 have changed and Spain, France and Singapore are not included

* Index calculation explained on slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓ = Ranked higher / lower than previous wave(s)
Base = All regular wine drinkers (RWDs) (n≥15,300)
Source: IWSR, Vinitrac®, Oct 2021, Oct / Nov 2022, Oct / Nov 2023 (n≥15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

2. Natural wine scores rising across markets

Natural wine's Opportunity Index score has improved the most in the past year. Sweden, Portugal, New Zealand and Hong Kong have seen the largest positive shift in scores, due to increases across the studied parameters.

Among alternative wines, organic has the highest awareness and more mature markets – particularly in Sweden and Germany, where the Opportunity Index has barely changed in the past year. Brazil, New Zealand and Hong Kong are the markets for which the Index score has improved the most.

Global Alternative Wine Opportunity Index 2024*

Organic wine

	Index score 2024		Score change vs 2023
1	China	68.2	0
2	Sweden	62.1	-1
3	Germany	56	1
4	Japan	50.7	-1
5	South Korea	50.1	-3
6	Hong Kong	49.9	4
7	Brazil	49.7	8
8	Ireland	48.6	3
9	Denmark	47.8	0
10	US	47.3	-1
11	Canada	47	1
12	UK	45.3	1
13	New Zealand	42.9	6
14	Australia	41.5	0
15	Portugal	33.4	2

Natural wine

	Index score 2024		Score change vs 2023
1	Brazil	71.7	4
2	China	67.6	2
3	Hong Kong	61.9	6
4	Portugal	58.5	7
5	US	55.1	-2
6	New Zealand	50.6	7
7	Japan	49.6	-1
8	Ireland	49.6	3
9	UK	49.1	4
10	Australia	48.1	-1
11	Canada	47.7	2
12	Denmark	47.6	7
13	South Korea	46.3	-3
14	Sweden	46	4
15	Germany	42.4	1

Sustainable wine

	Index score 2024		Score change vs 2023
1	China	58.3	3
2	Brazil	54	9
3	Germany	50.4	0
4	Portugal	47.3	5
5	Sweden	44.9	4
6	UK	44.7	-4
7	New Zealand	43.9	2
8	Australia	43.9	2
9	South Korea	43	0
10	US	42.9	-1
11	Canada	42.3	-1
12	Ireland	41.4	1
13	Hong Kong	39.7	-1
14	Japan	39	-2
15	Denmark	36.2	3

Note: Chinese concerns about ultra-processed food, overly positive answers in surveys and the nature of the sample (explained in the Methodology) contribute to the obtained high scores

* Index calculation explained on slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average
Base = All RWDs (n≥15,300)
Source: IWSR, Vinitrac®, Oct / Nov 2022, Oct / Nov 2023 (n≥15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

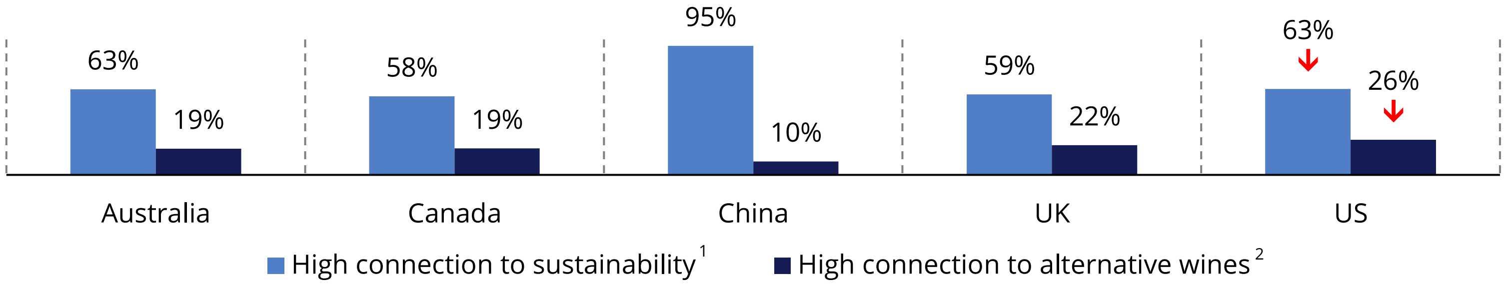
3. Climate concerns not enough to justify sustainability spend

Sustainability remains a core value for most wine drinkers. The proportion of climate-conscious consumers has remained largely stable, except in the US, where drinkers could be shifting their focus to health and wellness.

Climate concerns, however, are not always justifying higher spend: growing economic pressure could force wine drinkers, especially in Australia and the US, to re-evaluate their choices and willingness to pay more for sustainable wines.

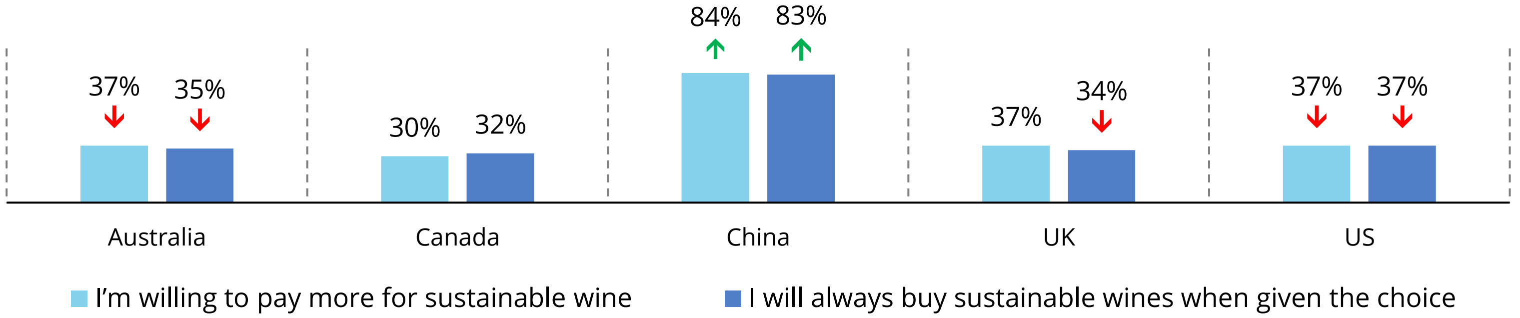
Consumer connection to sustainability and alternative wines

Proportion of global RWDs (%)



Attitudes towards sustainability in wine

Proportion of RWDs who agree with the below statements (%)



Note: Chinese concerns about ultra-processed food, overly positive answers in surveys and the nature of the sample (explained in the Methodology) contributed to the high scores

1 Agree or agree strongly with five or more statements about sustainability; 2 Those who purchase more than two types of alternative wines

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

Base = All Australian, Canadian, UK and US RWDs, plus Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥6,061)

Source: IWSR, Vinitrac®, Oct / Nov 2022, Oct / Nov 2023 (n≥6,061) RWDs from Australia, Canada, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine

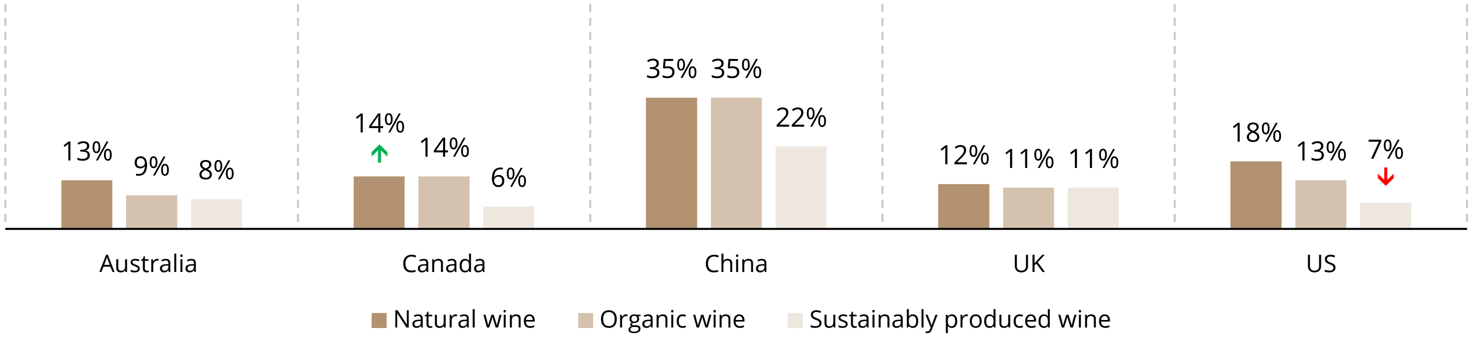
4. Perceived quality is the biggest driver

Natural wine, followed closely by organic wine, has remained one of the most purchased alternative wines across markets. Furthermore, purchase incidence has significantly increased in Canada.

An explanation for the resilience of these wine types lies in a combination of factors: sustainability, and the perception of higher quality, 'better-for-you' wines. In our exercise*, quality recognition is the claim driving purchases the most; this point is explained further on the next slide.

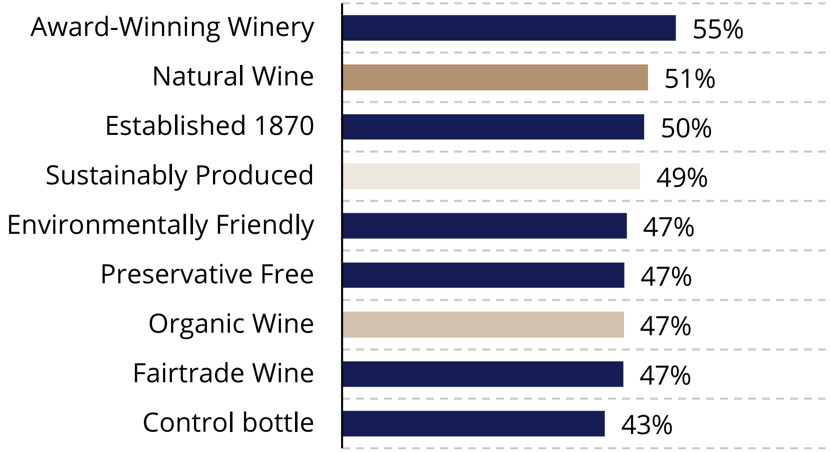
Natural, organic and sustainable wine purchases

RWDs who have sought to purchase these wines in the past 6 months (%)



Likelihood of purchasing alternative wines vs control bottle*

RWDs who would be likely or very likely to purchase wines labelled with the following claims (%)



This exercise was only conducted in **Australia, Canada, UK** and **US**

* Exercise explained on slide 27

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

Base = All Australian, Canadian, UK and US RWDs, plus Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥6,061)

Source: IWSR, Vinitrac®, Oct / Nov 2022, Oct / Nov 2023 (n≥6,061) RWDs from Australia, Canada, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine

5. Associations with quality stronger for younger buyers

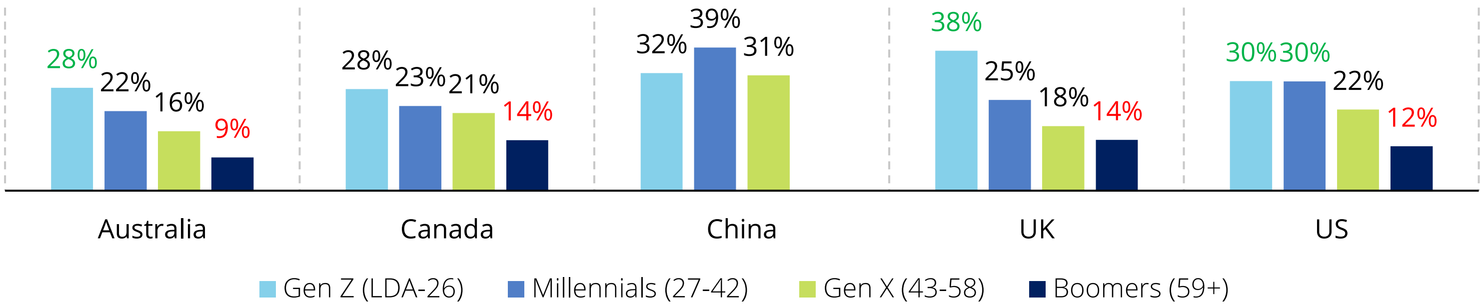
Perceived quality, as mentioned before, is a pivotal driver of wine purchases. Younger age cohorts – the most engaged buyers of alternative wines – show stronger positive associations for organic and natural wine, especially in the UK, US and Australia.

On the other hand, fewer Boomers – the age group engaged the least with alternative wines – associate them with high quality.

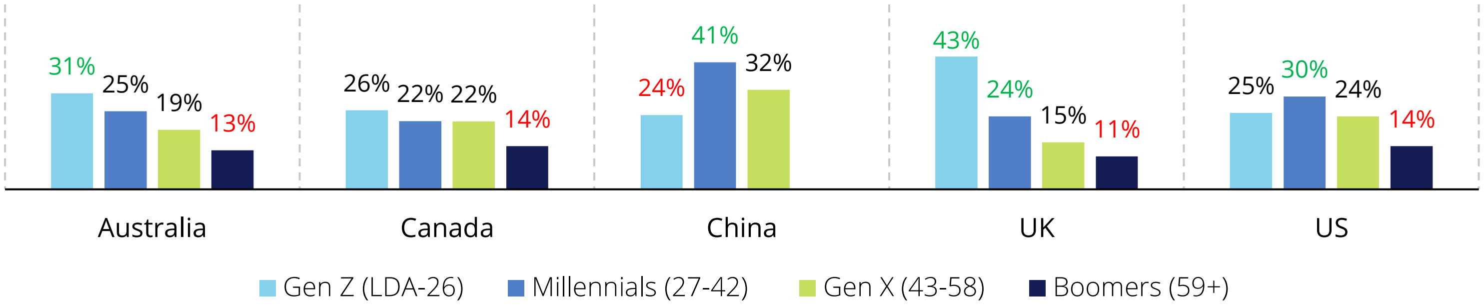
High-quality association with alternative wines

RWDs associating the below alternative wines with high quality (%)

Organic wine



Natural wine



Green / red: Statistically significantly higher / lower than all Australian, Canadian, UK and US RWDs, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, at a 95% confidence level
Base = All Australian, Canadian, UK and US RWDs, plus Chinese urban upper middle-class semi-annual drinkers of imported wine (n=6,061)
Source: IWSR, Vinitrac®, Oct / Nov 2023 (n=6,061) RWDs from Australia, Canada, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine

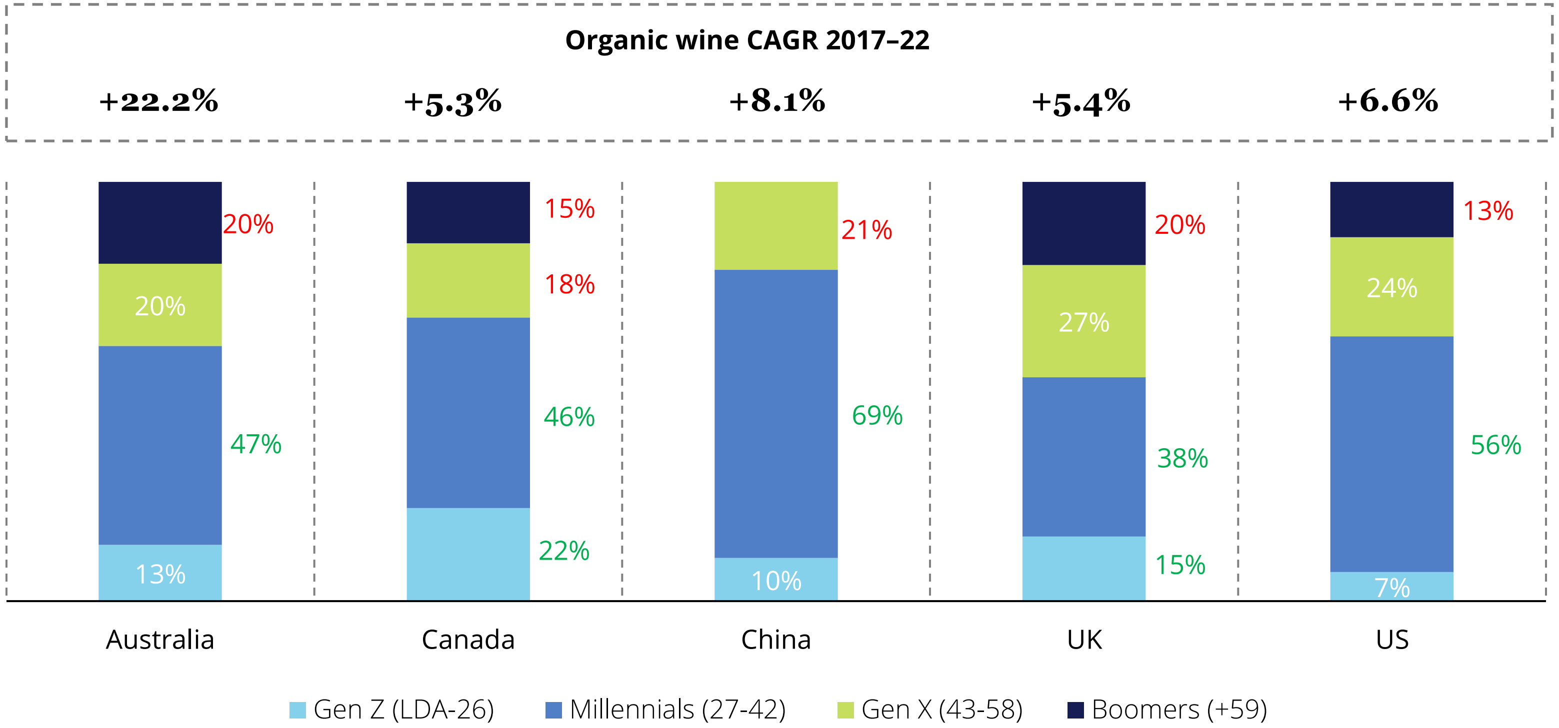
6. Millennials driving growth

Millennials have the widest alternative wine repertoires. Older age cohorts show established habits, purchasing mostly organic wine across markets, as well as Fairtrade in the UK.

A combination of climate concern and a stronger perception of higher quality make Millennials the most engaged with alternative wines.

Demographics buying more types of alternative wine by market

RWDs who purchase more than two types of alternative wine (%)



Green / red: Statistically significantly higher / lower than all Australian, Canadian, UK and US RWDs, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, at a 95% confidence level

Base = All Australian, Canadian, UK and US RWDs, plus Chinese urban upper middle-class semi-annual drinkers of imported wine (n=6,061)

Source: IWSR, Vinitrac®, Oct / Nov 2023 (n=6,061) RWDs from Australia, Canada, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine

Global summary

Alternative wine market sizing

The proportion of climate-conscious wine drinkers has remained stable in the past year, except in the US

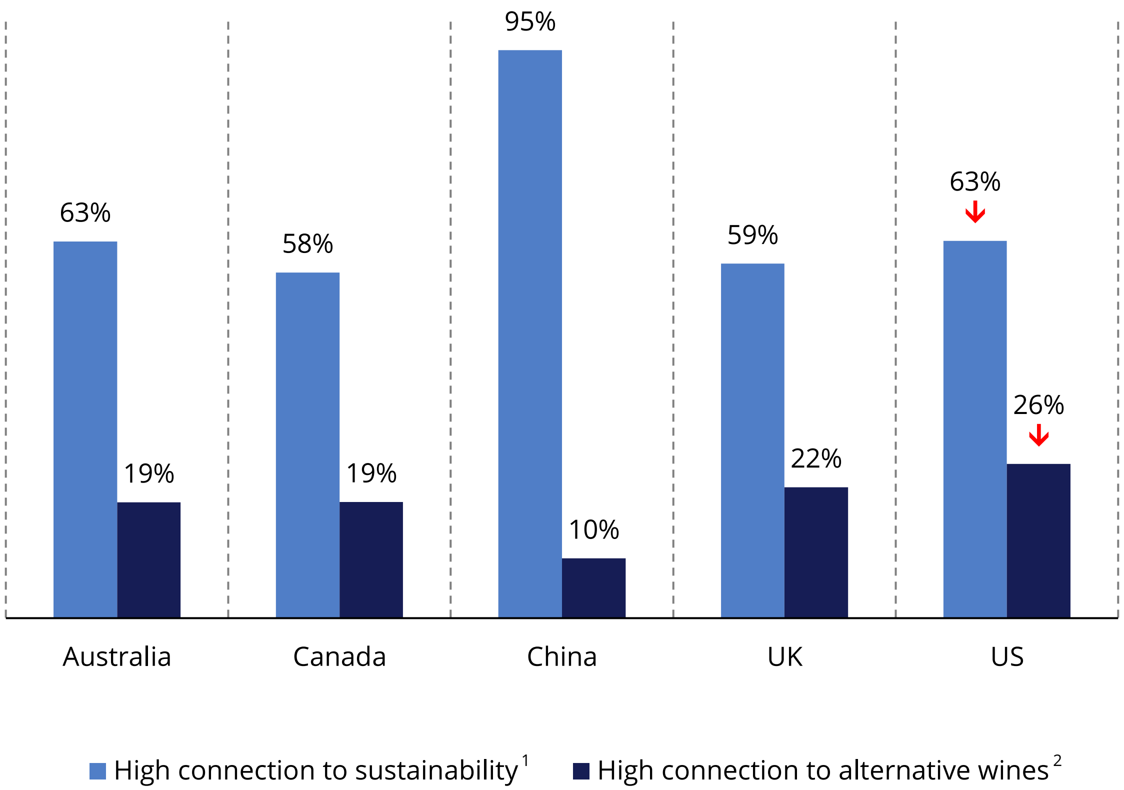
Globally, sustainability remains important for a large proportion of wine drinkers, with no major changes in Australia, Canada, China or the UK.

The US remains the market in which the most wine drinkers purchase more types of alternative wines, despite the fact that fewer American wine drinkers were highly engaged with sustainability and alternative wines this year. This decline in engagement could be attributed to increasing economic pressure, and the wellness and health trend displacing buyers' priorities.

In China, the studied sample population is, for the most part, climate-conscious. However, this market continues to be the one with the fewest wine drinkers purchasing a variety of alternative wines, with organic, natural, and sustainable wines dominating alternative wine purchases.

Consumer connection to sustainability and alternative wines

Global RWDs (%)



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Source: IWSR, Vinitrac®, Oct / Nov 2022, Oct / Nov 2023 (n≥6,061) RWDs from Australia, Canada, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine

Attitudes to sustainability

Globally, nearly two in every three regular wine drinkers (RWDs) are seeking to minimise their impact on climate change, with China over-indexing against other markets

Attitudes to sustainability

RWDs who agree with each of the below statements (%)

General attitudes to sustainability	Global average (n=15,300)	Australia (n=1,007)	Canada (n=1,020)	China (n=1,010)	UK (n=1,006)	US (n=2,018)
I worry about climate change and try to minimise my personal impact	60%	61%	58%	74%	62%	59%
I expect the brands I buy to support social causes	49%	46%	36%	88%	43%	40%
I always buy sustainable products where possible	48%	44%	36%	82%	42%	41%
I am willing to pay more for a product that is sustainably produced	47%	42%	34%	85%	40%	45%
I am willing to give up convenience in return for a product that is sustainably produced	44%	41%	32%	78%	39%	41%

Attitudes to sustainable food	Global average (n=15,300)	Australia (n=1,007)	Canada (n=1,020)	China (n=1,010)	UK (n=1,006)	US (n=2,018)
I try to buy food that is grown or produced locally	61%	64%	58%	80%	52%	61%
I actively eat more/exclusively eat vegetarian or vegan food	31%	31%	23%	55%	28%	29%

Note: Chinese concerns about ultra-processed food, overly positive answers in surveys and the nature of the sample (explained in the Methodology) contributed to the obtained high scores

Green / red: Statistically significantly higher / lower than all global RWDs at a 95% confidence level
Base = All RWDs (n=15,300)
Source: IWSR, Vinitrac®, Oct / Nov 2023 (n=15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

Attitudes to sustainability in wine

In line with overall engagement with sustainability, attitudes to sustainable wine have remained broadly stable, except in the US

Attitudes to sustainability in wine

RWDs who agree with each of the below statements (%)

Attitudes to sustainable wine	Global average (n=15,300)	Australia (n=1,007)	Canada (n=1,020)	China (n=1,010)	UK (n=1,006)	US (n=2,018)
Sustainable wine contains fewer chemicals than other wine	53%	51%	44%	78%	50%	51%
I only trust the sustainability of wines if they have official certification	53%	53%	44%	80%	49%	49%
Wine is a more sustainable product compared with other drinks	51%	48%	39%	84%	41%	48%
I'm willing to pay more for sustainable wine	43%	37%	30%	83%	37%	41%
I will always buy sustainable wines when given the choice	42%	35%	32%	84%	34%	37%
Sustainable wine is always organically produced	41%	35%	26%	78%	30%	37%

Wine packaging and sustainability	Global average (n=15,300)	Australia (n=1,007)	Canada (n=1,020)	China (n=1,010)	UK (n=1,006)	US (n=2,018)
Glass bottles are a sustainable form of wine packaging	62%	66%	58%	75%	64%	60%
Bag-in-Box is a sustainable form of wine packaging	44%	38%	35%	72%	39%	40%

Insights

In the US, brands positioned towards health and wellness have replaced those positioned as being sustainable.

Moreover, a reduction in disposable incomes has impacted consumer willingness to pay more for sustainable products.

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Base = All RWDs (n=15,300)
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Alternative Wine Opportunity Index calculation

The Alternative Wine Opportunity Index was created to reveal which alternative wine types have the strongest market opportunities.

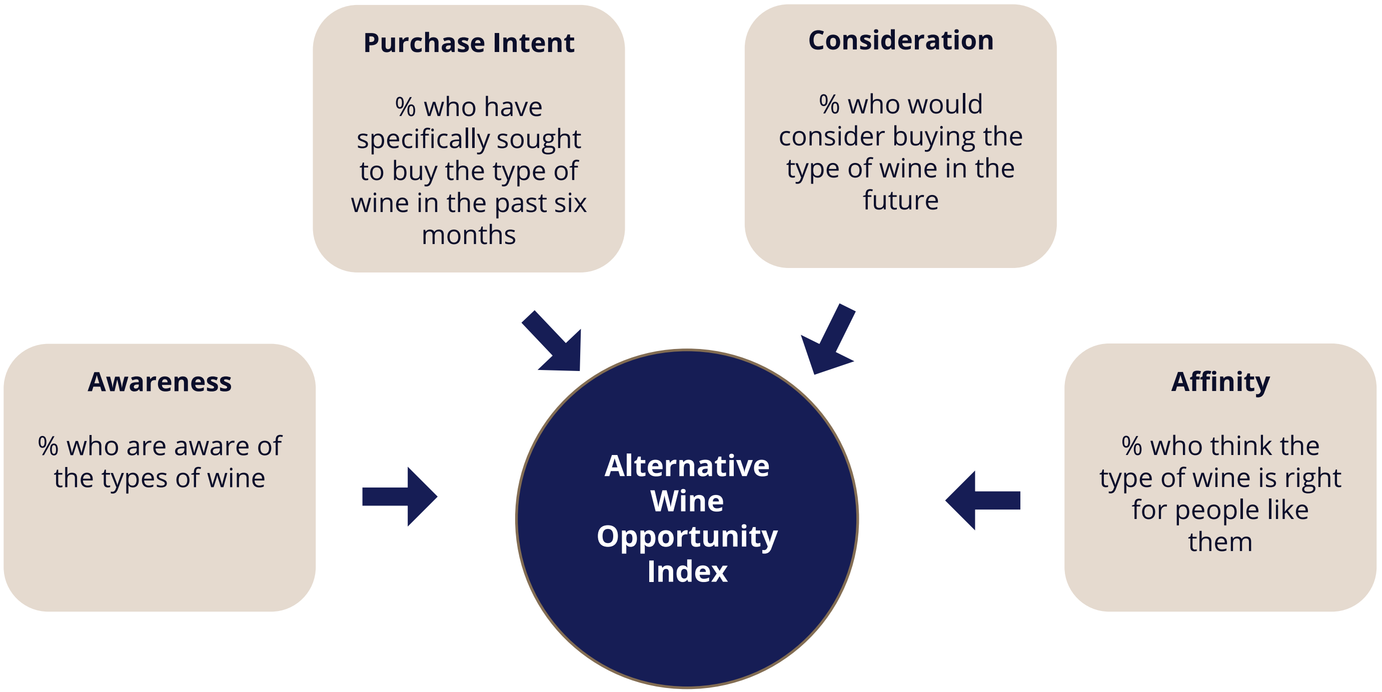
To calculate our Alternative Wine Opportunity Index, we combine four measures: Awareness, Purchase Intent, Purchase Consideration, and Affinity.

The Index is weighted to reflect the size of the wine-drinking population in each market, enabling it to reflect the global market opportunity.

Research bias

Chinese concerns about ultra-processed food, overly positive answers in surveys and the nature of the sample (explained in the Methodology) contribute to the obtained high scores.

The definition of natural wine is not well established across markets and can be interpreted differently by respondents.



Data for Spain, France and Singapore was not collected, and these countries were excluded from 2024 Opportunity Index, therefore global scores might differ from 2023 report

Alternative Wine Opportunity Index

Natural, organic and sustainably produced wines continue to be those offering more opportunities for growth globally, with a slight improvement in the Index across categories

Global Alternative Wine Opportunity Index 2024*

		Index score 2024	Score change vs 2022	Score change vs 2023	Rank change vs 2022	Rank change vs 2023
1	Natural wine	**58.5**	5.6	4.8	=	=
2	Organic wine	**54.2**	4.8	3.7	=	=
3	Sustainably produced wine	**49.5**	4.1	2.8	=	=
4	Environmentally friendly wine	**46.3**	3.0	1.8	=	=
5	Preservative-free wine	**43.2**	4.3	2.1	1↑	1↑
6	Fairtrade wine	**41.8**	2.1	0.1	1↓	1↓
7	Wine from a carbon-neutral winery	**40.7**	3.7	2.6	=	=
8	Sulphite-free wine	**37.5**	2.6	1.8	=	=
9	Pét nat (pétillant naturel)	**37.1**	4.0	3.2	=	1↑
10	Orange/skin-contact wine	**35.9**	4.4	1.5	1↑	1↓
11	Biodynamic wine	**34.6**	2.7	0.8	1↓	=
12	Vegan wine	**30.5**	3.0	0.5	1↑	=
13	Vegetarian wine	**29.5**	1.7	0.3	1↓	=

Insights

- Among alternative wines, natural wine offers more opportunities globally; it is especially popular among younger age cohorts.
- Preservative-free wine has improved its Index score in recent years, overtaking Fairtrade. The latter remains strong in the UK, Germany and Ireland, despite a slight drop in awareness driven by fewer Gen Zs being aware of it.
- Japan, in line with a culture that promotes health and a simplified approach to food and beverages, offers more opportunities for preservative-free and sulphite-free wines, followed by natural wine.

* Index calculation explained on slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓ = Ranked higher / lower than previous wave
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Source: IWSR, Vinitrac®, Oct 2021, Oct / Nov 2022, Oct / Nov 2023 (n≥15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

Opportunity Index market comparison

Natural wine dominates the Opportunity Index across markets, and Fairtrade remains strong in UK

Global Alternative Wine Opportunity Index 2024* by core market

		Global average (n=15,300)	Australia (n=1,007)	Canada (n=1,020)	China (n=1,010)	UK (n=1,006)	US (n=2,018)
1	Natural wine	**58.5**	48.1	47.7	67.6	49.1	55.1
2	Organic wine	**54.2**	41.5	47.0	68.2	45.3	47.3
3	Sustainably produced wine	**49.5**	43.9	42.3	58.3	44.7	42.9
4	Environmentally friendly wine	**46.3**	43.3	35.2	54.8	45.6	43.3
5	Preservative-free wine	**43.2**	39.1	36.4	47.6	33.8	38.2
6	Fairtrade wine	**41.8**	33.6	35.4	45.8	48.1	37.9
7	Wine from a carbon-neutral winery	**40.7**	32.9	32.4	46.7	34.7	41.6
8=	Sulphite-free wine	**37.5**	33.1	38.7	45.2	33.1	38.3
8=	Pét nat (pétillant naturel)	**37.1**	26.3	29.5	53.7	26.7	29.7
10	Orange/skin-contact wine	**35.9**	29.7	26.7	45.2	34.3	34.7
11	Biodynamic wine	**34.6**	26.4	35.1	47.7	27.0	34.1
12	Vegan wine	**30.5**	23.3	19.9	46.0	26.2	28.0
13	Vegetarian wine	**29.5**	21.6	27.1	42.7	24.7	28.9

Insights

- Environmentally friendly and sustainably produced wines show similar opportunities in countries including Canada, the UK and the US.

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Organic wine: Total market share

Organic wine volumes are growing across all countries. Germany and the UK continue to dominate the organic wine market, representing more than half of total volumes in the reported markets

Organic wine performance by market

		Volume (000s 9LC)			CAGR 2017–22	Total volume share (%)
		2020	2021	2022		
1	Germany	14,270	15,500	14,820	1.9%	26%
2	France	11,265	12,100	11,300	4.1%	20%
3	UK	7,525	7,620	7,450	5.4%	13%
4	US	5,750	5,955	6,120	6.6%	11%
5	Sweden	5,125	4,995	4,825	2.7%	8%
6	Japan	3,300	3,450	3,850	2.7%	7%
7	Italy	1,625	1,690	2,540	13.7%	4%
8	Australia	1,000	1,300	1,451	22.2%	3%
9	Spain	1,250	1,350	1,400	2.3%	2%
10	Denmark	1,150	1,175	1,188	12.0%	2%
11	China	1,026	1,100	1,150	8.1%	2%
12	Canada	375.5	402	427	5.3%	1%
13	South Korea	280	390	400	17.6%	1%
14	New Zealand	309	306	288	2.9%	0.5%
15	Portugal	230	228	275	1.9%	0.5%
16	Hong Kong	182	198	186	1.1%	0.3%
17	Brazil	85	95	100	7.4%	0.2%
18	Ireland	45	45	50	45.2%	0.1%
19	Singapore	30	33	36	10.1%	0.1%

Source: IWSR; Organic wine is as defined in each individual market

Insights

- Germany and Sweden remain the most matured markets, with the lowest growth rates for organic wine by volume, while Australia and South Korea have seen the biggest growth in recent years, albeit from a small base.

Organic Wine Opportunity Index

China, Sweden and Germany remain the key markets in which organic wine has more opportunities for growth

Global Organic Wine Opportunity Index 2024*

		Index score 2024	Score change vs 2022	Score change vs 2023	Rank change vs 2022	Rank change vs 2023
1	China	**68.2**	1.3	0.2	=	=
2	Sweden	**62.1**	-3.7	-0.8	=	=
3	Germany	**56.0**	1.8	1.3	=	=
4	Japan	**50.7**	0.6	-1.1	1↑	1↑
5	South Korea	**50.1**	-1.5	-3.3	1↓	1↓
6	Hong Kong	**49.9**	2.6	4.1	3↑	4↑
7	Brazil	**49.7**	2.9	8.4	3↑	6↑
8	Ireland	**48.6**	-0.4	2.5	2↓	1↑
9	Denmark	**47.8**	n/a	0.0	n/a	2↓
10	US	**47.3**	-1.1	-0.7	3↓	4↓
11	Canada	**47.0**	-0.5	0.7	3↓	3↓
12	UK	**45.3**	1.0	0.6	1↓	1↓
13	New Zealand	**42.9**	0.0	5.8	1↓	1↑
14	Australia	**41.5**	0.4	-0.1	1↓	2↓
15	Portugal	**33.4**	4.4	2.2	1↓	=

* Index calculation explained on slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓ = Ranked higher / lower than previous wave
Base = All RWDs (n≥15,300)
Source: IWSR, Vinitrac®, Oct 2021, Oct / Nov 2022, Oct / Nov 2023 (n≥15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

Insights

- Index scores have improved the most for Hong Kong, Brazil and New Zealand. This is driven by an increase in awareness and consideration of the category and an increase of purchase in New Zealand.
- The Opportunity Index score for organic wine has progressively decreased in Sweden in recent years. This is because the market has reached maturity and competition from other alternative wines is challenging the sub-category.

Natural Wine Opportunity Index

Natural wine has improved its score across most markets, with Brazil and China dominating the ranking

Global Natural Wine Opportunity Index 2024*

		Index score 2024	Score change		Rank change	
			vs 2022	vs 2023	vs 2022	vs 2023
1	Brazil	**71.7**	7.2	3.7	=	=
2	China	**67.6**	5.4	1.7	=	=
3	Hong Kong	**61.9**	3.2	5.9	=	1↑
4	Portugal	**58.5**	7.3	6.6	2↑	1↑
5	US	**55.1**	2.3	-2.2	=	3↓
6	New Zealand	**50.6**	3.2	6.9	2↑	6↑
7	Japan	**49.6**	4.4	-0.8	3↑	1↓
8	Ireland	**49.6**	4.9	3.1	3↑	1↑
9	UK	**49.1**	7.6	4.0	4↑	2↑
10	Australia	**48.1**	-2.6	-1.0	3↓	2↓
11	Canada	**47.7**	1.0	1.5	2↓	1↓
12	Denmark	**47.6**	n/a	6.7	n/a	3↑
13	South Korea	**46.3**	3.5	-2.9	=	6↓
14	Sweden	**46.0**	1.3	4.0	2↓	1↓
15	Germany	**42.4**	1.6	1.0	1↓	2↓

* Index calculation explained on slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓ = Ranked higher / lower than previous wave
Base = All RWDs (n≥15,300)
Source: IWSR, Vinitrac®, Oct 2021, Oct / Nov 2022, Oct / Nov 2023 (n≥15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

Insights

- Portugal, Hong Kong and New Zealand saw the largest increase in their Opportunity Index scores.
- Natural wine is the most popular alternative wine in Brazil, with up to 62% of wine drinkers aware of this type of wine, and 45% purchasing it.

Note: The word 'natural' can be interpreted differently by respondents and some might not know what 'natural wine' means.

Sustainable Wine Opportunity Index

China, Brazil and Germany remain the top countries in the Opportunity Index for sustainably produced wine

Global Sustainable Wine Opportunity Index 2024*

		Index score 2024	Score change		Rank change	
			vs 2022	vs 2023	vs 2022	vs 2023
1	China	**58.3**	4.4	3.1	1↑	=
2	Brazil	**54.0**	-0.7	8.7	1↓	2↑
3	Germany	**50.4**	-0.8	0.4	=	1↓
4	Portugal	**47.3**	3.6	4.8	2↑	4↑
5	Sweden	**44.9**	-1.5	-4.3	1↓	7↑
6	UK	**44.7**	-0.1	-3.7	1↓	3↓
7=	New Zealand	**43.9**	2.8	1.6	4↑	2↑
7=	Australia	**43.9**	1.3	2.0	2↑	2↑
9	South Korea	**43.0**	2.9	0.1	3↑	2↓
10	US	**42.9**	0.0	-1.5	1↓	5↓
11	Canada	**42.3**	-0.7	-1.2	4↓	5↓
12	Ireland	**41.4**	-1.6	1.1	4↓	2↑
13	Hong Kong	**39.7**	0.3	-0.7	=	=
14	Japan	**39.0**	7.3	-2.4	=	3↓
15	Denmark	**36.2**	n/a	2.5	n/a	=

* Index calculation explained on slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓ = Ranked higher / lower than previous wave
Base = All RWDs (n≥15,300)
Source: IWSR, Vinitrac®, Oct 2021, Oct / Nov 2022, Oct / Nov 2023 (n≥15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

Insights

- The Opportunity Index in UK has seen a slight drop. This is due to awareness of sustainably produced wine decreasing in the past year; however, purchases have remained stable, and are particularly high among Millennials.

Note: Chinese concerns about ultra-processed food, overly positive answers in surveys and the nature of the sample (explained in the Methodology) contribute to the obtained high scores

Alternative wine associations

Sustainable wine remains the wine most associated with tackling environmental challenges and with being more ethically responsible

Alternative wine associations

RWDs who associate alternative wine types with the following statements (%)

	Organic wine	Natural wine	Sustainable wine
More environmentally friendly	27%	23%	38%
More expensive	34%	25%	26%
Made with fewer chemical additives	34%	31%	18%
Better for my health	30%	28%	16%
More ethically responsible	21%	18%	31%
Less processed	24%	28%	16%
Higher quality	23%	24%	16%
Better-tasting	19%	24%	14%
Better with food	15%	18%	13%
More prestigious	15%	15%	12%
Better value for money	12%	17%	13%
Less likely to give me a hangover	14%	14%	10%
Worse-tasting	9%	8%	10%
None of these	14%	16%	16%

Relatively strong associations

Average

Relatively weak associations

Base = All Australian, Canadian, UK and US RWDs, plus Chinese urban upper middle-class semi-annual drinkers of imported wine (n=6,061)
Source: Vinitrac®, Oct / Nov 2023 (n=6,061) RWDs from Australia, Canada, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine

Insights

- Natural wine continues to be associated with being less processed and with fewer chemicals, but also with higher quality in comparison to sustainable and organic wine. This is particularly important as the health and wellness trend continues to gather momentum.
- As health-consciousness increases, natural and organic wines perceived as 'better for you' could show more resilience in the face of current economic headwinds.

Organic wine associations by market

Organic wine is perceived as more expensive than regular wine across markets, especially in the UK – the exception is China, where fewer wine drinkers share this perception

Organic wine associations by key market

RWDs who associate organic wine with the following statements (%)

	Global average (n=15,300)	Australia (n=1,007)	Canada (n=1,020)	China (n=1,010)	UK (n=1,006)	US (n=2,018)
More expensive	34%	34%	37%	26%	38%	35%
Made with fewer chemical additives	34%	31%	36%	32%	31%	35%
Better for my health	30%	24%	28%	37%	20%	29%
More environmentally friendly	27%	25%	28%	30%	29%	26%
Less processed	24%	25%	23%	23%	24%	24%
Higher quality	23%	17%	20%	36%	20%	21%
More ethically responsible	21%	22%	22%	25%	26%	20%
Better-tasting	19%	14%	16%	35%	15%	17%
More prestigious	15%	14%	12%	28%	11%	11%
Better with food	15%	11%	14%	25%	11%	12%
Less likely to give me a hangover	14%	13%	11%	26%	11%	11%
Better value for money	12%	8%	9%	23%	9%	10%
Worse-tasting	9%	11%	9%	14%	6%	7%
None of these	14%	19%	18%	2%	18%	14%

Green / red: Statistically significantly higher / lower than all global RWDs at a 95% confidence level
Base = All RWDs (n=15,300)
Source: IWSR, Vinitrac®, Oct / Nov 2023 (n=15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

Insights

- Organic wine's association with being more expensive is driven by older age groups in the UK and the US, while younger generations are perceiving organic wine as good for their health and better-tasting.

Natural wine associations by market

Across markets, natural wine remains associated with undergoing fewer processes during its production and having fewer additives

Natural wine associations by key market

RWDs who associate natural wine with the following statements (%)

	Global average (n=15,300)	Australia (n=1,007)	Canada (n=1,020)	China (n=1,010)	UK (n=1,006)	US (n=2,018)
Made with fewer chemical additives	31%	28%	33%	35%	30%	30%
Less processed	28%	28%	26%	31%	29%	29%
Better for my health	28%	24%	26%	38%	22%	26%
More expensive	25%	25%	24%	24%	27%	24%
Better-tasting	24%	19%	23%	37%	19%	22%
Higher quality	24%	20%	20%	36%	18%	22%
More environmentally friendly	23%	20%	24%	32%	23%	20%
Better with food	18%	16%	16%	28%	13%	16%
More ethically responsible	18%	19%	19%	26%	20%	16%
Better value for money	17%	16%	14%	26%	12%	15%
More prestigious	15%	13%	12%	27%	9%	11%
Less likely to give me a hangover	14%	15%	13%	26%	12%	12%
Worse-tasting	8%	8%	6%	13%	6%	7%
None of these	16%	19%	20%	2%	22%	17%

Green / red: Statistically significantly higher / lower than all global RWDs at a 95% confidence level
Base = All RWDs (n=15,300)
Source: IWSR, Vinitrac®, Oct / Nov 2023 (n=15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

Insights

- As they did with other wine types, Millennials and Gen Zs in the UK and US have more positive associations with natural wines. Up to 43% of Gen Z in UK associating natural wine with better quality.
- On the other hand, Boomers have fewer associations with this type of wine in comparison to all age groups.

Sustainable wine associations by market

In line with last year, sustainable wine remains associated with an eco-friendly production approach and more ethically responsible practices across countries, but the associations are particularly strong in China and the UK

Sustainable wine associations by key market

RWDs who associate sustainable wine with the following statements (%)

	Global average (n=15,300)	Australia (n=1,007)	Canada (n=1,020)	China (n=1,010)	UK (n=1,006)	US (n=2,018)
More environmentally friendly	38%	35%	34%	41%	41%	36%
More ethically responsible	31%	30%	31%	38%	36%	30%
More expensive	26%	27%	26%	25%	28%	25%
Made with fewer chemical additives	18%	17%	15%	30%	18%	17%
Better for my health	16%	16%	11%	29%	13%	13%
Less processed	16%	15%	14%	22%	16%	16%
Higher quality	16%	13%	13%	28%	13%	14%
Better tasting	14%	11%	11%	27%	10%	15%
Better with food	13%	12%	10%	23%	10%	10%
Better value for money	13%	11%	13%	22%	9%	11%
More prestigious	12%	12%	10%	24%	9%	9%
Worse tasting	10%	10%	10%	17%	6%	8%
Less likely to give me a hangover	10%	8%	7%	21%	8%	8%
None of these	16%	20%	21%	2%	19%	18%

Green / red: Statistically significantly higher / lower than all global RWDs at a 95% confidence level
Base = All RWDs (n=15,300)
Source: IWSR, Vinitrac®, Oct / Nov 2023 (n=15,300) RWDs from Australia, Brazil, Canada, Denmark, Germany, Ireland, Japan, New Zealand, Portugal, Sweden, UK and US, plus Chinese urban upper middle-class semi-annual drinkers of imported wine, Hong Kong semi-annual wine drinkers and South Korea semi-annual imported grape-based wine drinkers

Insights

- Younger age cohorts in markets such as the UK and the US associate sustainable wine with products that are better for the environment as well as with being better-tasting and better for their health. By contrast, older age groups have fewer associations with sustainably produced wine.

Net Purchase Intent exercise

For the purposes of our Net Purchase Intent exercise, respondents saw a set of two wine bottles: a ‘no claim’ control bottle, and a second bottle with a randomly selected claim from the list shown added to labelling.

This exercise was conducted in the English-speaking countries: Australia, Canada, the UK and the US.

Claims tested against control bottle:

Award-Winning Winery
Biodynamic Wine
Cannabis Infused
Carbon-Neutral Winery
Environmentally Friendly
Established 1870
Fairtrade
Natural Wine
Organic Wine
Preservative Free
Sulphite Free Wine
Sustainably Produced
Vegan Wine
Vegetarian Wine

‘No claim’ bottle

Bottle with claim (in this case, ‘Natural Wine’)

Net Purchase Intent by wine claim (1/2)

Quality recognition ('award-winning') and tradition have remained the statements driving purchase the most in the past year, while natural wine has dropped in the ranking

Net Purchase Intent by wine claim: Tracking

Proportion likely or very likely to buy each wine type (%)

		2021 (n=5,834)	2022 (n=5,253)	2023 (n=5,051)	Ranking vs 2022	Ranking vs 2023
1	Award-Winning Winery	56%	62%	57%	=	=
2=	Established 1870	51%	58%	52%	=	↑
2=	Natural Wine	50%	62%	52%	=	↓
4=	Preservative Free	48%	54%	50%	=	↑
4=	Sustainably Produced	48%	54%	50%	↑	=
6	Environmentally Friendly	46%	52%	48%	↑	↑
7	Fairtrade Wine	48%	52%	47%	↓	↑
8=	Organic Wine	48%	57%	46%	↓	↓
8=	Control Bottle	44%	51%	46%	=	=
10	Sulphite Free Wine	43%	49%	43%	=	=
11	Carbon-Neutral Winery	40%	45%	40%	=	=
12	Cannabis Infused	34%	40%	35%	=	=
13	Biodynamic Wine	29%	37%	33%	=	=
14	Vegetarian Wine	28%	35%	30%	=	↑
15	Vegan Wine	28%	36%	28%	=	↓

↑ / ↓: Rank higher / lower than previous wave(s)
Base = All Australian, Canadian, UK and US RWDs (n≥5,051)
Source: IWSR, Vinitrac®, Oct 2021, Oct / Nov 2022, Oct / Nov 2023 (n≥5,051) RWDs from Australia, Canada, UK and US

Insights

- 'Environmentally friendly' was the only alternative wine claim to have improved its ranking progressively in recent years.

Net Purchase Intent by wine claim (2/2)

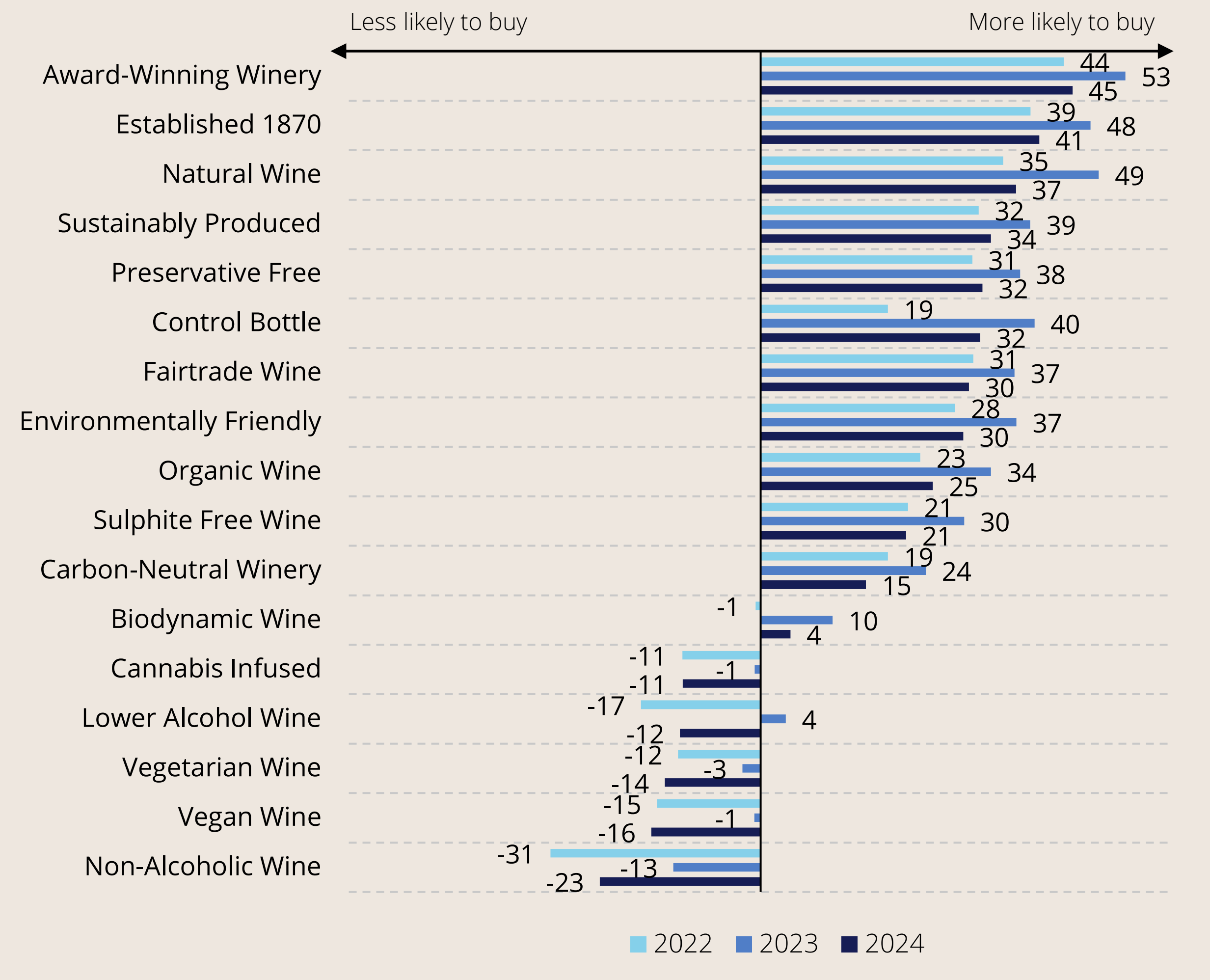
In the past year, overall net scores have decreased, driven by fewer US regular wine drinkers being influenced by labelling claims

Across wine types, the net scores have experienced a drop in comparison to last year, with fewer wine drinkers likely to purchase a wine with the shown claims on it. This has been driven by a decrease of US wine drinkers choosing those claims, while it has remained broadly stable in the rest of the studied markets.

Vegan and Vegetarian remain the claims most rejected by wine drinkers across markets; Boomers are the least likely to purchase these wines.

Net Purchase Intent by wine claim

Net scores



Net scores calculated by subtracting the number of consumers unlikely to buy from those likely to buy each wine
Base = All Australian, Canadian, UK and US RWDs (n≥5,051)
Source: IWSR, Vinitrac®, Oct 2021, Oct / Nov 2022, Oct / Nov 2023 (n≥5,051) RWDs from Australia, Canada, UK and US

Market focus: Australia

Market focus: Australia

Key takeaways

1. Spending on sustainable wine impacted

Sustainability remains an important concern for Australian wine drinkers. The proportion of climate-conscious wine drinkers has remained stable in the past year. However, with growing economic pressure, fewer wine drinkers are willing to pay higher prices for a more sustainable wine.

2. Natural wine dominates the Opportunity Index

Natural wine, despite a slight decrease in the Opportunity Index score, remains the greatest source of growth opportunities among wine drinkers, followed closely by sustainably produced wine and environmentally friendly wine.

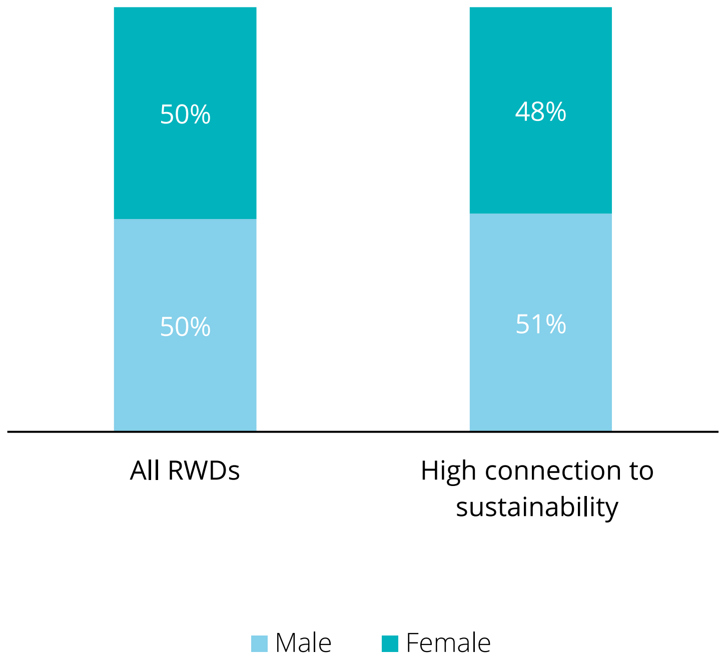
3. Fairtrade, vegan/vegetarian losing share

Purchases have remained stable in the past year for most wines. However, Fairtrade, vegan and vegetarian wines are purchased by fewer wine drinkers.

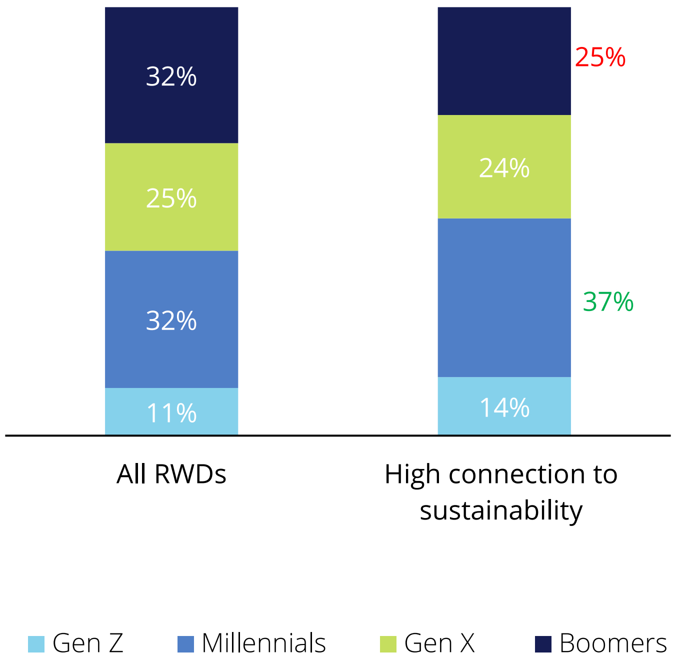
Demographics: High connection to sustainability

Australian wine drinkers engaged with sustainability skew Millennial and are more likely to purchase alternative wines

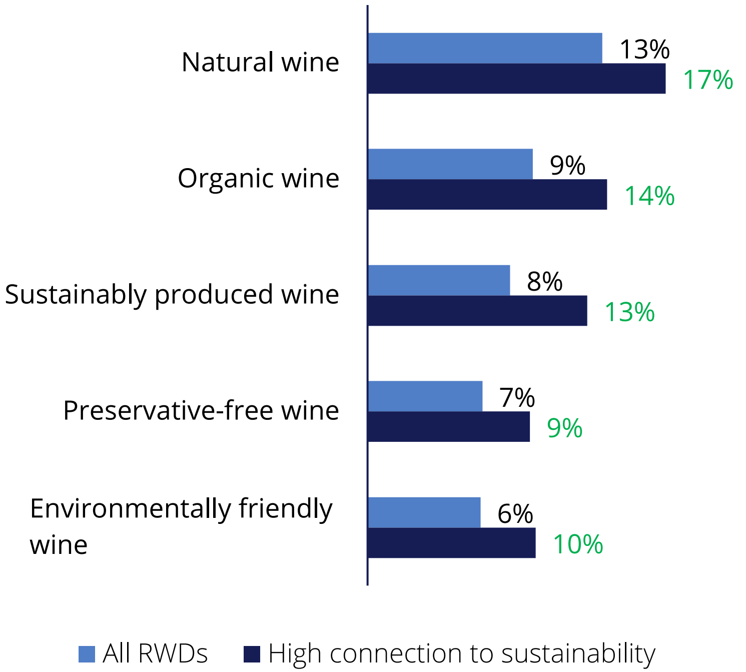
Gender*



Age groups**



Alternative wine purchase: Top 5



* Respondents were given the option of self-describing gender, so male / female proportions may not equal 100. ** Gen Z (18–26), Millennials (27–42), Gen X (43–58), Boomers (59+)
Green / red: Statistically significantly higher / lower than all Australian RWDs at a 95% confidence level
Base = All Australian regular wine drinkers (RWDs) (n=1,007)
Source: IWSR, Vinitrac® Australia, Nov 2023 (n=1,007) Australian RWDs

Attitudes to sustainability

Despite climate concerns persisting and almost two in three wine drinkers seeking to limit their impact, willingness to pay more on sustainable products and expectations for brands to support social causes is waning

Attitudes to sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

General attitudes to sustainability	2021 (n=1,000)	2022 (n=1,009)	2023 (n=1,007)	Tracking vs 2021	Tracking vs 2022
I worry about climate change and try to minimise my personal impact	64%	64%	61%	→	→
I expect the brands I buy to support social causes	53%	51%	46%	↓	↓
I always buy sustainable products where possible	50%	48%	44%	↓	→
I am willing to pay more for a product that is sustainably produced	47%	47%	41%	↓	↓
I am willing to give up convenience in return for a product that is sustainably produced	50%	48%	44%	↓	→

Attitudes to sustainable food	2021 (n=1,000)	2022 (n=1,009)	2023 (n=1,007)	Tracking vs 2021	Tracking vs 2022
I try to buy food that is grown or produced locally	64%	67%	64%	→	→
I actively eat more/exclusively vegetarian or vegan food	37%	36%	31%	↓	↓

Insights

Millennials are the most climate-conscious wine drinkers. This translates into a willingness to forgo convenience in favour of more eco-friendly alternatives. Meanwhile, Boomers are less willing to pay more or give up convenience in order to tackle climate change.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Australian RWDs (n≥1,000)
Source: IWSR, Vinitrac® Australia, Oct 2021, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Sustainability in wine

In line with the previous insights, although sustainability remains important to Australian wine drinkers, the cost-of-living crisis is impacting their willingness to spend more on sustainable wine

Attitudes to sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

Attitudes to sustainable wine	2021 (n=1,000)	2022 (n=1,009)	2023 (n=1,007)	Tracking vs 2021	Tracking vs 2022
I only trust the sustainability of wines if they have official certification	54%	57%	53%	→	→
Sustainable wine has fewer chemicals than other wine	54%	53%	51%	→	→
Wine is a more sustainable product compared with other drinks	51%	52%	48%	→	→
I'm willing to pay more for sustainable wine	46%	45%	37%	↓	↓
I will always buy sustainable wines when given the choice	44%	43%	35%	↓	↓
Sustainable wine is always organically produced	42%	39%	35%	↓	→

Wine packaging and sustainability	2021 (n=1,000)	2022 (n=1,009)	2023 (n=1,007)	Tracking vs 2021	Tracking vs 2022
Glass bottles are a sustainable form of wine packaging	68%	68%	66%	→	→
Bag-in-Box is a sustainable form of wine packaging	41%	44%	38%	→	↓

Insights

Official certifications matter more to Millennials, with up to 70% trusting only wines with those labels.

Younger age groups are more willing to pay more for sustainable wines, while Boomers are the least likely to do so.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Australian RWDs (n≥1,000)
Source: IWSR, Vinitrac® Australia, Oct 2021, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Australia Alternative Wine Opportunity Index

Natural wine remains at the top of the Opportunity Index despite a drop in score, while environmentally friendly wines saw the biggest increase, overtaking organic wine

Australia Alternative Wine Opportunity Index 2024*

		Index score 2024	Score change		Rank change	
			vs 2022	vs 2023	vs 2022	vs 2023
1	Natural wine	**48.1**	-2.6	-1.0	=	=
2	Sustainably produced wine	**43.9**	1.3	2.0	=	=
3	Environmentally friendly wine	**43.3**	4.0	6.3	1↑	3↑
4	Organic wine	**41.5**	0.4	-0.1	1↓	1↓
5	Preservative-free wine	**39.1**	0.1	0.2	=	=
6	Fairtrade wine	**33.6**	-1.5	-5.5	1↑	2↓
7	Sulphite-free wine	**33.1**	-1.5	-1.6	1↑	1↑
8	Wine from a carbon-neutral winery	**32.9**	-3.3	-2.7	2↓	1↓
9	Orange/skin-contact wine	**29.7**	2.5	0.4	4↑	2↑
10	Biodynamic wine	**26.4**	-7.4	-1.8	1↓	2↑
11	Pét nat (pétillant naturel)	**26.3**	-4.2	-5.2	1↓	2↓
12	Vegan wine	**23.3**	-4.2	-3.0	=	1↑
13	Vegetarian wine	**21.6**	-7.3	-8.6	2↓	3↓

Insights

- Natural wine and sustainably produced wine offer more opportunities for growth across demographics.
- Orange/skin-contact wine and pét nat are better known, and more frequently purchased by younger age groups.

* Index calculation explained on slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Base = All Australian RWDs (n≥1,000)
Source: IWSR, Vinitrac® Australia, Oct 2021, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Alternative wine awareness

Awareness has remained stable in the past year, with long-term increases for organic, preservative-free, natural, sustainably produced and environmentally friendly wine

Alternative wines awareness: Tracking

Awareness: Proportion of RWDs who have heard of the following wines (%)

Awareness	2021 (n=1,000)	2022 (n=1,009)	2023 (n=1,007)	Tracking vs 2021	Tracking vs 2022
Organic wine	42%	48%	49%	↑	→
Preservative-free wine	27%	31%	31%	↑	→
Natural wine	26%	29%	31%	↑	→
Sustainably produced wine	24%	29%	29%	↑	→
Environmentally friendly wine	20%	21%	22%	→	→
Vegan wine	21%	24%	22%	→	→
Sulphite-free wine	21%	21%	21%	→	→
Fairtrade wine	14%	17%	15%	→	→
Wine from a carbon-neutral winery	13%	14%	14%	→	→
Vegetarian wine	12%	13%	12%	→	→
Biodynamic wine	12%	11%	10%	→	→
Orange/skin-contact wine	9%	10%	8%	→	→
Pét nat (pétillant naturel)	6%	6%	7%	→	→

Insights

- Organic wine is particularly popular among women and Boomers, with more wine drinkers within these groups aware of organic wines in comparison to all demographic groups.
- Orange/skin-contact wine and pét nat are more popular with Millennials than they are with other age cohorts.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Australian RWDs (n≥1,000)
Source: IWSR, Vinitrac® Australia, Oct 2021, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Alternative wines sought to purchase

Natural and organic remain the most purchased wines, while Fairtrade, vegan and vegetarian wine show short- and long-term decline

Alternative wines sought to purchase: Tracking

Sought to purchase: Proportion of RWDs who have specifically sought out the below wine types to buy in the past 6 months (%)

Sought to purchase	2021 (n=1,000)	2022 (n=1,009)	2023 (n=1,007)	Tracking vs 2021	Tracking vs 2022
Natural wine	13%	13%	13%	→	→
Organic wine	10%	11%	9%	→	→
Sustainably produced wine	7%	7%	8%	→	→
Preservative-free wine	7%	7%	7%	→	→
Environmentally friendly wine	7%	6%	6%	→	→
Sulphite-free wine	5%	4%	4%	→	→
Fairtrade wine	4%	7%	3%	→	↓
Wine from a carbon-neutral winery	5%	4%	3%	→	→
Vegan wine	5%	5%	3%	↓	↓
Vegetarian wine	3%	4%	2%	→	↓
Orange/skin-contact wine	3%	3%	2%	→	→
Biodynamic wine	5%	3%	2%	↓	→
Pét nat (pétillant naturel)	2%	3%	2%	→	→

Insights

- Younger age groups are the most important buyers of alternative wines. Millennials are the age cohort purchasing more wine types, while Boomers have narrower repertoires, with up to 61% not purchasing any alternative wine.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Australian RWDs (n≥1,000)
Source: IWSR, Vinitrac® Australia, Oct 2021, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Alternative wine consideration and affinity

Environmentally friendly wine is the only wine type experiencing an increase in either future purchase consideration or consumer affinity

Alternative wines future purchase consideration/affinity: Tracking

Proportion of RWDs considering future purchase of/with affinity for named wine types (%)

	Future purchase consideration[1]			Affinity[2]		
	2022	2023	Tracking vs 2022	2022	2023	Tracking vs 2022
Sustainably produced wine	65%	68%	→	56%	60%	→
Environmentally friendly wine	52%	66%	↑	54%	66%	↑
Natural wine	68%	66%	→	66%	62%	→
Fairtrade wine	58%	59%	→	55%	50%	→
Preservative-free wine	53%	55%	→	52%	52%	→
Orange/skin-contact wine	48%	55%	→	40%	44%	→
Wine from a carbon-neutral winery	61%	55%	→	55%	51%	→
Sulphite-free wine	55%	53%	→	51%	46%	→
Organic wine	48%	50%	→	44%	43%	→
Biodynamic wine	46%	48%	→	41%	39%	→
Pét nat (pétillant naturel)	44%	44%	→	46%	41%	→
Vegan wine	35%	35%	→	27%	26%	→
Vegetarian wine	45%	31%	↓	42%	30%	↓

1 RWDs who will consider buying the named wine type in the future (%). 2 RWDs who think these types of wine are right for people like them (%)
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = those who are aware of at least one alternative wine
Source: IWSR, Vinitrac® Australia, Oct 2021, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Alternative wine awareness

Organic wine remains the best-known wine type across age groups, particularly among Boomers and female wine drinkers

Alternative wine awareness by demographic

Proportion of RWDs who have heard of the following wine types (%)

	All Australian RWDs (n=1,007)	Tracking vs 2022	Gender: Male (n=504)	Gender: Female (n=501)	Age: Gen Z (19–26) (n=112)	Age: Millennials (27–42) (n=323)	Age: Gen X (43–58) (n=253)	Age: Boomers (59+) (n=320)
Organic wine	49%	→	42%	55%	36%	42%	55%	55%
Preservative-free wine	31%	→	29%	33%	20%	28%	33%	38%
Natural wine	31%	→	35%	28%	35%	36%	30%	26%
Sustainably produced wine	29%	→	31%	28%	25%	30%	25%	34%
Environmentally friendly wine	22%	→	22%	22%	24%	25%	20%	20%
Vegan wine	22%	→	21%	23%	19%	25%	24%	18%
Sulphite-free wine	21%	→	21%	21%	16%	20%	21%	24%
Fairtrade wine	15%	→	13%	16%	14%	17%	15%	13%
Wine from a carbon-neutral winery	14%	→	17%	11%	22%	16%	12%	9%
Vegetarian wine	12%	→	14%	11%	15%	15%	12%	9%
Biodynamic wine	10%	→	11%	10%	8%	13%	9%	10%
Orange/skin-contact wine	8%	→	7%	8%	8%	13%	5%	5%
Pét nat (pétillant naturel)	7%	→	7%	7%	11%	11%	5%	2%

Green / red: Statistically significantly higher / lower than all Australian RWDs at a 95% confidence level. ↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Australian RWDs (n≥1,000)
Source: IWSR, Vinitrac® Australia, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Alternative wine purchase

Millennials, followed by Gen Z, have the widest repertoire of alternative wines, while the Boomer age cohort is purchasing fewest wine types

Alternative wine sought to purchase by demographic

Proportion of RWDs who sought out to purchase the named wine types in the past six months (%)

	All Australian RWDs (n=1,007)	Tracking vs 2022	Gender: Male (n=504)	Gender: Female (n=501)	Age: Gen Z (19–26) (n=112)	Age: Millennials (27–42) (n=323)	Age: Gen X (43–58) (n=253)	Age: Boomers (59+) (n=320)
Natural wine	13%	→	16%	11%	15%	17%	13%	9%
Organic wine	9%	→	10%	9%	12%	13%	9%	5%
Sustainably produced wine	8%	→	9%	7%	12%	9%	6%	8%
Preservative-free wine	7%	→	7%	6%	7%	9%	8%	3%
Environmentally friendly wine	6%	→	8%	5%	8%	9%	5%	4%
Sulphite-free wine	4%	→	5%	4%	9%	4%	4%	2%
Fairtrade wine	3%	↓	4%	3%	5%	6%	3%	1%
Wine from a carbon-neutral winery	3%	→	4%	2%	6%	5%	2%	1%
Vegan wine	3%	↓	3%	3%	4%	6%	0%	1%
Vegetarian wine	2%	↓	3%	2%	3%	5%	1%	0%
Orange/skin-contact wine	2%	→	2%	2%	3%	5%	1%	0%
Biodynamic wine	2%	→	2%	2%	3%	3%	2%	0%
Pét nat (pétillant naturel)	2%	→	2%	2%	5%	3%	1%	0%

Green / red: Statistically significantly higher / lower than all Australian RWDs at a 95% confidence level. ↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Australian RWDs (n≥1,000)
Source: IWSR, Vinitrac® Australia, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Alternative wine associations

Organic wine is considered to be more expensive most often, while sustainable wine is strongly associated with more eco-friendly production methods, and natural wine with a less intrusive production approach

Alternative wine associations

RWDs who associate alternative wine types with the following statements (%)

	Organic wine	Natural wine	Sustainable wine
More expensive	34%	25%	27%
More environmentally friendly	25%	20%	35%
Made with fewer chemical additives	31%	28%	17%
More ethically responsible	22%	19%	30%
Less processed	25%	28%	15%
Better for my health	24%	24%	16%
Higher quality	17%	20%	13%
Better-tasting	14%	19%	11%
More prestigious	14%	13%	12%
Better with food	11%	16%	12%
Less likely to give me a hangover	13%	15%	8%
Better value for money	8%	16%	11%
Worse-tasting	11%	8%	10%
None of these	19%	19%	20%

Relatively strong associations

Average

Relatively weak associations

Insights

- Gen Zs have the most positive associations across alternative wines; more wine drinkers in this age cohort consider organic, natural and sustainable wines to be better quality, and one in four considers natural wines more prestigious.

Base = All Australian RWDs (n=1,007)
Source: IWSR, Vinitrac® Australia, Nov 2023 (n=1,007) Australian RWDs

Purchase Intent by wine claim

The importance of quality and tradition has remained stable, while 'sustainable' and 'natural' claims have experienced a slight drop, suggesting they could be losing their appeal

Purchase Intent: Tracking*

Proportion likely or very likely to purchase wines labelled with the following claims (%)

	2021 (n=1,000)	2022 (n=1,009)	2023 (n=1,007)	Tracking vs 2021	Tracking vs 2022
Award-Winning Winery	54%	55%	55%	→	→
Established 1870	56%	50%	53%	→	→
Sustainably Produced	54%	57%	51%	→	→
Natural Wine	52%	55%	49%	→	→
Preservative Free	53%	51%	48%	→	→
Environmentally Friendly	51%	51%	48%	→	→
Organic Wine	47%	47%	45%	→	→
Control Bottle	48%	48%	45%	→	→
Fairtrade Wine	48%	47%	43%	→	→
Sulphite Free Wine	45%	46%	41%	→	→
Carbon-Neutral Winery	48%	45%	38%	↓	↓
Cannabis Infused	37%	38%	34%	→	→
Biodynamic Wine	38%	34%	32%	→	→
Vegetarian Wine	32%	29%	28%	→	→
Vegan Wine	33%	31%	26%	↓	→

Insights

- Millennials are more likely to respond to on-pack claims, while Boomers are less likely than other age cohorts to purchase wines labelled with claims.

* Exercise explained on slide 27
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Australian RWDs (n≥1,000)
Source: IWSR, Vinitrac® Australia, Oct 2021, Oct 2022, Nov 2023 (n≥1,000) Australian RWDs

Market focus: Canada

Market focus: Canada

Key takeaways

1. Natural wine surpasses organic

Natural wine has risen to the top of the Opportunity Index in Canada, overtaking organic wine that has remained stable in the past year. More Canadian wine drinkers are aware of and purchase natural wine, particularly Gen Z and Millennials.

2. Gen Zs and Millennials main buyers

Younger age groups have a wider repertoire of alternative wines. Older Canadians are loyal to their existing choice and show little interest in alternative wines.

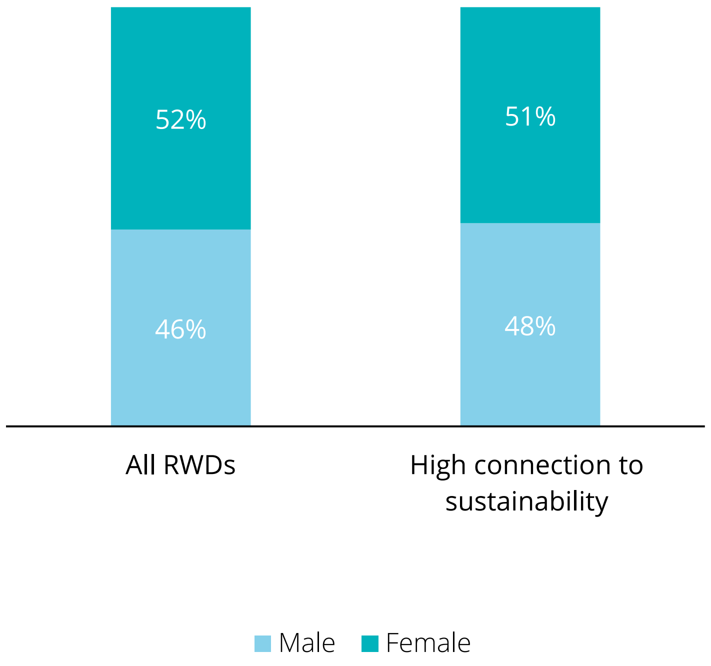
3. Cannabis-infused wine losing momentum

Fewer wine drinkers are using cannabis products than in 2021, when usage peaked. This is likely due to fewer wine drinkers considering this product to be a better replacement for alcoholic beverages.

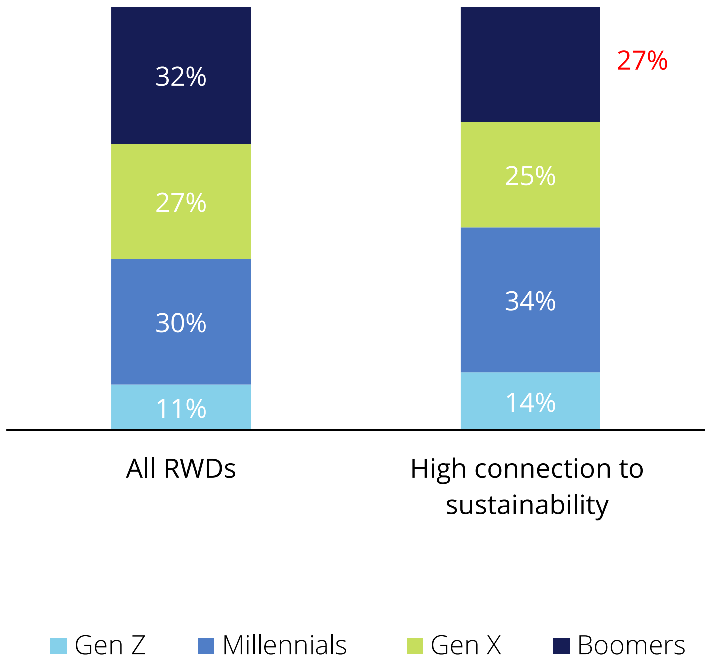
Demographics: High connection to sustainability

Wine drinkers with a high connection to sustainability skew younger, and are more likely to purchase organic, natural and sustainably produced wine

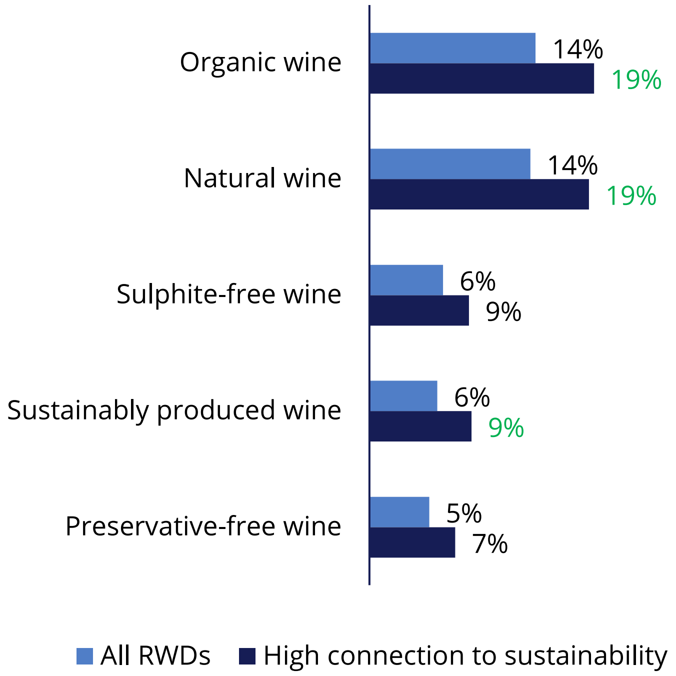
Gender*



Age groups**



Alternative wine purchase Top 5



* Respondents were given the option of self-describing gender, so male / female proportions may not equal 100. ** Gen Z (19–26), Millennials (27–42), Gen X (43–58), Boomers (59+)
Green / red: Statistically significantly higher/lower than all Canadian RWDs at a 95% confidence level
Base = All Canadian regular wine drinkers (RWDs) (n=1,020)
Source: IWSR, Vinitrac® Canada, Nov 2023 (n=1,020) Canadian RWDs

Attitudes to sustainability

The number of climate-conscious wine drinkers has decreased progressively in Canada over the past few years. However, the proportion of wine drinkers purchasing sustainable products has remained stable

Attitudes to sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

General attitudes to sustainability	2021 (n=1,834)	2022 (n=1,220)	2023 (n=1,020)	Tracking vs 2021	Tracking vs 2022
I worry about climate change and try to minimise my personal impact	68%	62%	58%	↓	↓
I expect the brands I buy to support social causes	43%	38%	36%	↓	→
I always buy sustainable products where possible	39%	38%	36%	→	→
I am willing to pay more for a product that is sustainably produced	42%	37%	34%	↓	→
I am willing to give up convenience in return for a product that is sustainably produced	42%	38%	32%	↓	↓

Attitudes to sustainable food	2021 (n=1,834)	2022 (n=1,220)	2023 (n=1,020)	Tracking vs 2021	Tracking vs 2022
I try to buy food that is grown or produced locally (in the region where I live)	65%	61%	58%	↓	→
I actively eat more/exclusively vegetarian or vegan food	29%	25%	23%	↓	→

Insights

More Millennials and Gen Zs are climate-focused and willing to purchase sustainable products and pay more for them.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Canadian RWDs (n≥1,020)
Source: IWSR, Vinitrac® Canada, Oct 2021, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Sustainability in wine

There has been no major change in wine sustainability attitudes in the past year; however, fewer Canadian wine drinkers are less willing to pay more for sustainable wines, driven by older age groups

Attitudes to sustainability: Tracking

RWDs who agree with each of the following statements (%)

Attitudes towards sustainable wine	2021 (n=1,834)	2022 (n=1,220)	2023 (n=1,020)	Tracking vs 2021	Tracking vs 2022
Sustainable wine has less chemicals than other wine	45%	44%	44%	→	→
I only trust the sustainability of wines if they have official certification	46%	47%	44%	→	→
Wine is a more sustainable product compared with other drinks	43%	42%	39%	↓	→
I'm willing to pay more for sustainable wine	37%	33%	30%	↓	→
I will always buy sustainable wines when given the choice	34%	34%	32%	→	→
Sustainable wine is always organically produced	29%	28%	26%	→	→

Wine packaging and sustainability	2021 (n=1,834)	2022 (n=1,220)	2023 (n=1,020)	Tracking vs 2021	Tracking vs 2022
Glass bottles are a sustainable form of wine packaging	60%	61%	58%	→	→
Bag-in-Box is a sustainable form of wine packaging	37%	36%	35%	→	→

Insights

In line with overall sustainably attitudes, the younger age cohorts (Gen Z and Millennials) are willing to pay more for sustainable wine in comparison to all sample

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Canadian RWDs (n≥1,020)
Source: IWSR, Vinitrac® Canada, Oct 2021, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Attitudes to cannabis products

The proportion of wine drinkers in Canada using cannabis products has decreased in the past year, with Gen Z and Millennials being the main users of these products

Attitudes to sustainability: Tracking

% who agree or strongly agree with each of the following statements

Attitudes to cannabis products	2021 (n=1,834)	2022 (n=1,220)	2023 (n=1,020)	Tracking vs 2021	Tracking vs 2022
I use cannabis products	31%	30%	26%	↓	↓
I think cannabis products are a good alternative to alcoholic beverages	30%	27%	24%	↓	→

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Canadian RWDs (n≥1,020)
Source: IWSR, Vinitrac® Canada, Oct 2021, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Canada Alternative Wine Opportunity Index

Natural has overtaken organic wine in the Opportunity Index, with both wine types continuing to dominate the ranking with very similar scores

Canada Alternative Wine Opportunity Index 2024*

		Index score 2024	Score change vs 2022	Score change vs 2023	Rank change vs 2022	Rank change vs 2023
1	Natural wine	**47.7**	1.0	1.5	1↑	1↑
2	Organic wine	**47.0**	-0.5	0.7	1↓	1↓
3	Sustainably produced wine	**42.3**	-0.7	-1.2	=	=
4	Sulphite-free wine	**38.7**	1.5	1.3	=	1↑
5	Preservative-free wine	**36.4**	0.6	0.8	2↑	3↑
6	Fairtrade wine	**35.4**	-1.0	-1.2	=	1↑
7	Environmentally friendly wine	**35.2**	-1.8	-4.6	2↓	3↓
8	Biodynamic wine	**35.1**	7.3	8.3	4↑	3↑
9	Wine from a carbon-neutral winery	**32.4**	-2.7	-4.5	1↓	3↓
10	Pét nat (pétillant naturel)	**29.5**	-0.6	4.8	=	1↑
11	Cannabis-infused wine	**28.6**	-3.4	-6.4	2↓	2↓
12	Vegetarian wine	**27.1**	2.7	6.5	2↑	2↑
13	Orange/skin-contact wine	**26.7**	-1.5	-3.8	2↓	3↓
14	Vegan wine	**19.9**	-5.2	-1.3	1↓	1↓

Insights

- Natural wine is particularly popular among Millennials and Gen Zs, who purchase this wine the most in comparison to all age groups.

* Index calculation explained in slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓: Rank changed higher/lower than previous wave
Base = All Canadian RWDs (n≥1,020)
Source: IWSR, Vinitrac® Canada, Oct 2021, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Alternative wine awareness

Awareness of natural wine has increased in the long-term, driven by younger age cohorts

Alternative wines awareness: Tracking

Awareness: Proportion of RWDs who have heard of the following wines (%)

Awareness	2021 (n=1,834)	2022 (n=1,220)	2023 (n=1,020)	Tracking vs 2021	Tracking vs 2022
Organic wine	50%	47%	50%	→	→
Natural wine	26%	28%	31%	↑	→
Sulphite-free wine	24%	22%	24%	→	→
Sustainably produced wine	21%	27%	21%	→	↓
Environmentally friendly wine	17%	22%	21%	↑	→
Preservative-free wine	18%	18%	20%	→	→
Fairtrade wine	16%	19%	16%	→	→
Vegan wine	12%	11%	12%	→	→
Orange/skin contact wine	11%	10%	12%	→	→
Wine from a carbon-neutral winery	9%	9%	11%	→	→
Cannabis-infused wine	11%	13%	10%	→	↓
Vegetarian wine	7%	5%	7%	→	→
Pét nat (pétillant naturel)	5%	5%	6%	→	→
Biodynamic wine	6%	6%	6%	→	→

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Canadian RWDs (n≥1,020)
Source: IWSR, Vinitrac® Canada, Oct 2021, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Insights

- Millennials are aware of more types of alternative wine, natural wine being the most popular type with this age group.
- Boomers show limited awareness of alternative wines, with organic wine being the one they are most likely to be aware of.
- Cannabis-infused wine is more popular among Gen Zs than it is with other age groups.

Alternative wines sought to purchase

Despite awareness of natural wine remaining stable in the past year, more Canadian wine drinkers now purchase this wine type, driven by Gen Zs and Millennials

Alternative wines sought to purchase: Tracking

Sought to purchase: Proportion of RWDs who have sought out the below wine types to buy in the past 6 months (%)

Sought to purchase	2021 (n=1,834)	2022 (n=1,220)	2023 (n=1,020)	Tracking vs 2021	Tracking vs 2022
Organic wine	14%	14%	14%	→	→
Natural wine	12%	11%	14%	→	↑
Sulphite-free wine	6%	7%	6%	→	→
Sustainably produced wine	6%	8%	6%	→	→
Preservative-free wine	4%	5%	5%	→	→
Environmentally friendly wine	5%	7%	5%	→	→
Fairtrade wine	4%	5%	4%	→	→
Orange/skin contact wine	3%	3%	3%	→	→
Wine from a carbon-neutral winery	3%	3%	3%	→	→
Vegan wine	2%	2%	3%	→	→
Biodynamic wine	2%	2%	3%	→	→
Cannabis-infused wine	2%	3%	2%	→	→
Vegetarian wine	2%	1%	2%	→	↑
Pét nat (pétillant naturel)	2%	1%	2%	→	→

Insights

- Gen Zs and Millennials are driving purchases of alternative wines, while half of Gen X and Boomers had not purchased any of the listed alternative wines in the past six months.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = those who are aware of at least one alternative wine
Source: IWSR, Vinitrac® Canada, Oct 2021, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Alternative wine consideration and affinity

Future purchase consideration and affinity in Canada have remained broadly stable across wine types

Alternative wines future purchase consideration/affinity: Tracking

Proportion of RWDs considering future purchase of/with affinity for named wine types (%)

	Future purchase consideration[1]			Affinity[2]		
	2022	2023	Tracking vs 2022	2022	2023	Tracking vs 2022
Sustainably produced wine	67%	68%	→	61%	64%	→
Sulphite-free wine	57%	62%	→	50%	53%	→
Natural wine	66%	61%	→	63%	62%	→
Environmentally friendly wine	62%	58%	→	55%	48%	→
Preservative-free wine	57%	57%	→	52%	53%	→
Organic wine	60%	56%	→	49%	51%	→
Wine from a carbon-neutral winery	62%	55%	→	58%	47%	→
Fairtrade wine	62%	53%	→	53%	57%	→
Pét nat (pétillant naturel)	48%	52%	→	37%	45%	→
Cannabis-infused wine	62%	51%	→	54%	43%	→
Biodynamic wine	43%	50%	→	42%	57%	→
Vegetarian wine	45%	47%	→	31%	41%	→
Orange/skin-contact wine	57%	42%	↓	40%	35%	→
Vegan wine	31%	30%	→	32%	23%	→

1 RWDs who will consider buying the named wine type in the future (%). 2 RWDs who think these types of wine are right for people like them (%)
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = those who are aware of at least one alternative wine
Source: IWSR, Vinitrac® Canada, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Alternative wine awareness

Organic wine is equally popular across demographics; natural wine is more popular among younger age cohorts

Alternative wine awareness by demographic

Proportion of RWDs who have heard of the following wine types (%)

	All Canadian RWDs (n=1,834)	Tracking vs 2022	Gender: Male (n=473)	Gender: Female (n=535)	Age: Gen Z (18–26) (n=110)	Age: Millennials (27–42) (n=303)	Age: Gen X (43–58) (n=278)	Age: Boomers (59+) (n=330)
Organic wine	50%	→	49%	51%	50%	52%	52%	47%
Natural wine	31%	→	34%	29%	43%	40%	26%	24%
Sulphite-free wine	24%	→	24%	24%	21%	23%	24%	25%
Sustainably produced wine	21%	↓	23%	20%	22%	20%	23%	20%
Environmentally friendly wine	21%	→	19%	22%	29%	24%	20%	15%
Preservative-free wine	20%	→	22%	17%	24%	23%	17%	17%
Fairtrade wine	16%	→	13%	18%	18%	18%	15%	14%
Vegan wine	12%	→	11%	13%	18%	18%	13%	5%
Orange/skin contact wine	12%	→	11%	13%	15%	17%	12%	7%
Wine from a carbon-neutral winery	11%	→	13%	9%	11%	16%	9%	8%
Cannabis-infused wine	10%	↓	14%	6%	18%	13%	8%	6%
Vegetarian wine	7%	→	9%	6%	11%	13%	4%	4%
Pét nat (pétillant naturel)	6%	→	7%	5%	11%	12%	4%	1%
Biodynamic wine	6%	→	8%	4%	12%	11%	4%	2%

Green / red: Statistically significantly higher / lower than all Australian RWDs at a 95% confidence level; ↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Canadian RWDs (n≥1,020)
Source: IWSR, Vinitrac® Canada, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Alternative wine purchase

Younger wine drinkers have a wider repertoire of alternative wines, with natural wine being purchased the most

Alternative wine purchase by demographic

Proportion of RWDs who sought to purchase the named wine types in the past six months (%)

			Gender		Age			
	All Canadian RWDs (n=1,834)	Tracking vs 2022	Male (n=473)	Female (n=535)	Gen Z (18–26) (n=110)	Millennials (27–42) (n=303)	Gen X (43–58) (n=278)	Boomers (59+) (n=330)
Organic wine	14%	→	15%	13%	19%	18%	15%	9%
Natural wine	14%	↑	17%	10%	23%	23%	9%	6%
Sulphite-free wine	6%	→	6%	6%	10%	9%	6%	4%
Sustainably produced wine	6%	→	6%	6%	11%	5%	7%	4%
Preservative-free wine	5%	→	6%	4%	9%	7%	3%	4%
Environmentally friendly wine	5%	→	4%	5%	8%	8%	3%	2%
Fairtrade wine	4%	→	4%	3%	7%	7%	2%	1%
Orange/skin contact wine	3%	→	3%	4%	7%	7%	2%	0%
Wine from a carbon-neutral winery	3%	→	4%	3%	2%	6%	3%	1%
Vegan wine	3%	→	2%	3%	6%	5%	1%	1%
Biodynamic wine	3%	→	4%	1%	6%	5%	1%	0%
Cannabis-infused wine	2%	→	3%	1%	8%	3%	0%	1%
Vegetarian wine	2%	↑	3%	1%	4%	4%	0%	0%
Pét nat (pétillant naturel)	2%	→	2%	1%	5%	4%	0%	0%

Green / red: Statistically significantly higher / lower than all Australian RWDs at a 95% confidence level; ↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Canadian RWDs (n≥1,020)
Source: IWSR, Vinitrac® Canada, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Alternative wine associations

Perceptions remain broadly stable, with organic wine perceived as more expensive, sustainable wine as more environmentally friendly, and natural wine as made with fewer additives

Alternative wine associations

RWDs who associate alternative wine types with the following statements (%)

	Organic wine	Natural wine	Sustainable wine
More expensive	37%	24%	26%
More environmentally friendly	28%	24%	34%
Made with fewer chemical additives	36%	33%	15%
More ethically responsible	22%	19%	31%
Better for my health	28%	26%	11%
Less processed	23%	26%	14%
Higher quality	20%	20%	13%
Better-tasting	16%	23%	11%
Better with food	14%	16%	10%
Better value for money	9%	14%	13%
More prestigious	12%	12%	10%
Less likely to give me a hangover	11%	13%	7%
Worse-tasting	9%	6%	10%
None of these	18%	20%	21%

Base = All Canadian RWDs (n=1,020)
Source: IWSR, Vinitrac® Canada, Nov 2023 (n=1,020) Canadian RWDs

Insights

- More wine drinkers perceive natural wine as a better-tasting wine in comparison to previous years.
- Particularly, more Gen Zs associate natural wine with a better taste, in addition to perceiving it as more prestigious and better value for money in comparison to all age groups.
- Moreover, this wine type is increasingly perceived by more wine drinkers as an environmentally friendly product.

Purchase Intent by wine claim

Quality recognition ('award-winning') and natural wine are the labelling claims most likely to influence purchase decision in Canada

Purchase Intent: Tracking*

Proportion likely or very likely to purchase wines labelled with the following claims (%)

	2021 (n=1,834)	2022 (n=1,220)	2023 (n=1,020)	Tracking vs 2021	Tracking vs 2022
Award-Winning Winery	55%	57%	52%	→	→
Natural Wine	46%	51%	52%	↑	→
Established 1870	51%	50%	49%	→	→
Preservative Free	46%	44%	48%	→	→
Organic	43%	47%	47%	→	→
Sustainably Produced	47%	48%	47%	→	→
Environmentally Friendly	44%	42%	44%	→	→
Control bottle	42%	39%	43%	→	↑
Sulphite Free Wine	42%	42%	43%	→	→
Fairtrade	44%	39%	39%	→	→
Carbon-Neutral Winery	35%	35%	38%	→	→
Cannabis Infused	34%	30%	30%	→	→
Biodynamic Wine	30%	27%	25%	↓	→
Vegetarian Wine	26%	22%	24%	→	→
Vegan Wine	25%	26%	23%	→	→

Insights

- The claim Award-Winning Winery' is a key driver of purchase across demographics.
- Natural Wine and Established in 1870 have a greater impact on younger age cohorts' likelihood of purchasing when compared to all age groups.

*Exercise explained on slide 27
↑ / ↓: Ranked higher / lower than previous wave
Base = All Canadian RWDs (n≥1,020)
Source: IWSR, Vinitrac® Canada, Oct 2021, Nov 2022, Nov 2023 (n≥1,020) Canadian RWDs

Market focus: China

Market focus: China

Key takeaways

1. Organic and natural wine remain strong

Organic and natural wine continue to be perceived as better for health, contributing to the popularity of these wine types among Chinese urban upper middle-class semi-annual drinkers of imported wine.

2. Gen Z less engaged with climate change

Despite a large proportion of semi-annual drinkers of imported wine being engaged with sustainability, Gen Z is the age group the least concerned about climate change. As a result, fewer Gen Z wine drinkers are willing to give up convenience or spend more for sustainably produced wines.

3. Biodynamic wines rising in the Opportunity Index

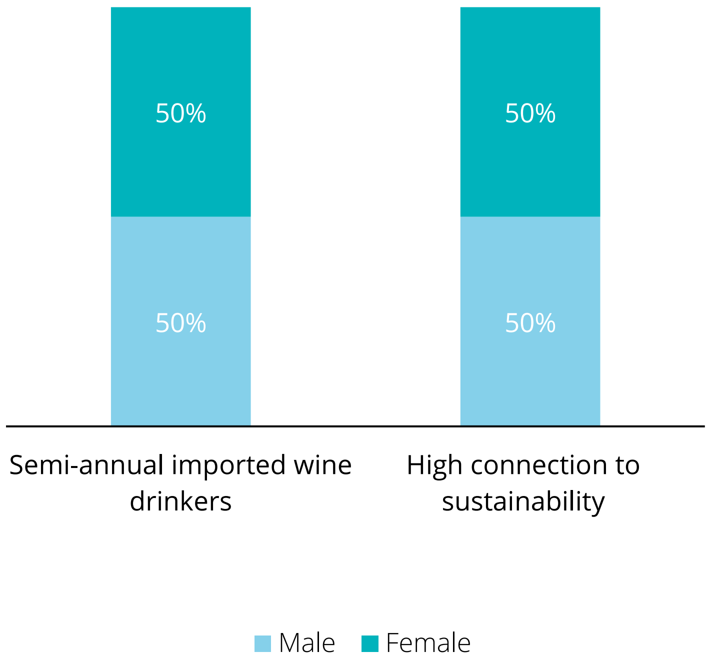
While most wine types have seen slight changes in the Opportunity Index in the past year, biodynamic wine is the type that has increased its Index score the most. This is reflective of increasing awareness and purchase among upper middle-class semi-annual drinkers of imported wine in China.

Note: Due to the sample being Chinese urban upper middle-class semi-annual drinkers of imported wine, the tendency of Chinese respondents to be overly positive in surveys, results are slightly higher in comparison to other markets

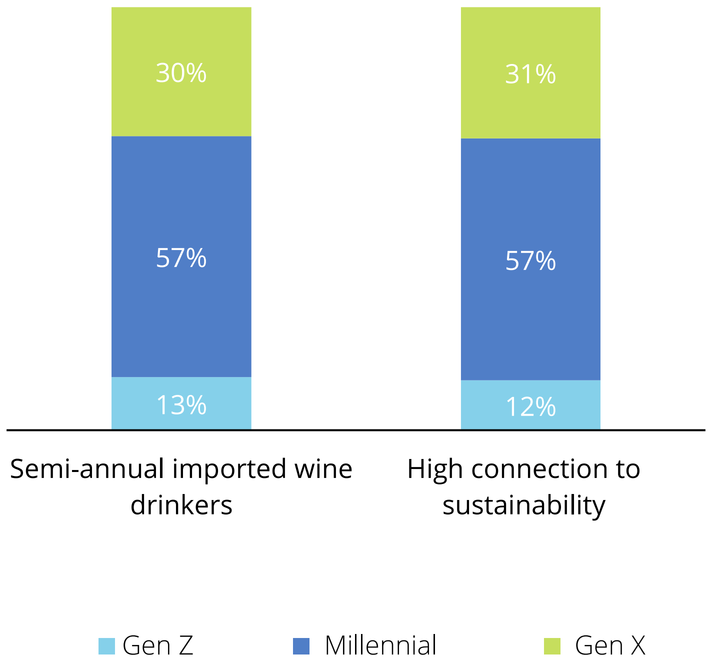
Demographics: High connection to sustainability

Chinese drinkers of imported wine have a high connection with sustainability, showing no major differences with all regular wine drinkers (RWDs)

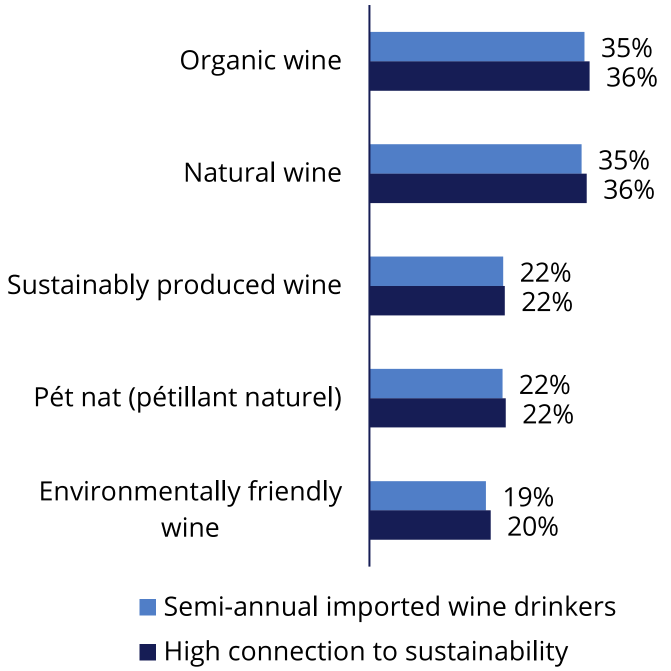
Gender*



Age groups**



Alternative wine purchase Top 5



* Gen Z (18–26), Millennials (27–42), Gen X (43–58)
Green / red: Statistically significantly higher / lower than all Chinese urban upper middle-class semi-annual drinkers of imported wine at a 95% confidence level
Base = All Chinese urban upper middle-class semi-annual drinkers of imported wine (n=1,000)
Source: IWSR, Vinitrac® China, Oct 2023 (n=1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

Attitudes to sustainability

More Chinese semi-annual drinkers of imported wine are becoming more environmentally conscious and are willing to pay more for sustainable products

Attitudes to sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

General attitudes to sustainability	2021 (n=1,000)	2022 (n=1,001)	2023 (n=1,010)	Tracking vs 2021	Tracking vs 2022
I expect the brands I buy to support social causes	89%	86%	88%	→	→
I am willing to pay more for a product that is sustainably produced	79%	81%	85%	↑	↑
I always buy sustainable products where possible	82%	79%	82%	→	→
I am willing to give up convenience in return for a product that is sustainably produced	75%	73%	78%	→	↑
I worry about climate change and try to minimise my personal impact	75%	70%	74%	→	↑

Attitudes to sustainable food	2021 (n=1,000)	2022 (n=1,001)	2023 (n=1,010)	Tracking vs 2021	Tracking vs 2022
I try to buy food that is grown or produced locally	78%	76%	80%	→	↑
I actively eat more/exclusively eat vegetarian or vegan food	59%	54%	55%	→	→

Insights

Concern about climate change and engagement with sustainability score high across demographics.

However, Gen Z is less engaged with these statements, with only 64% worried about climate change compared to 81% of Gen X.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥1,000)
Source: IWSR, Vinitrac® China, Oct 2021, Oct 2022 and Oct 2023 (n≥1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

Sustainability in wine

There is a growing share of imported wine drinkers willing to choose sustainable wines when given the choice, and to pay more for them

Attitudes to sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

Attitudes to sustainable wine	2021 (n=1,000)	2022 (n=1,001)	2023 (n=1,010)	Tracking vs 2021	Tracking vs 2022
Wine is a more sustainable product compared with other drinks	81%	79%	84%	→	↑
I will always buy sustainable wines when given the choice	80%	79%	84%	↑	↑
I'm willing to pay more for sustainable wine	79%	80%	83%	↑	↑
I only trust the sustainability of wines if they have official certification	78%	76%	80%	→	↑
Sustainable wine has fewer chemicals than other wine	75%	76%	78%	→	→
Sustainable wine is always organically produced	72%	73%	78%	↑	↑

Wine packaging and sustainability	2021 (n=1,000)	2022 (n=1,001)	2023 (n=1,010)	Tracking vs 2021	Tracking vs 2022
Glass bottles are a sustainable form of wine packaging	76%	73%	75%	→	→
Bag-in-Box is a sustainable form of wine packaging	71%	67%	72%	→	↑

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥1,000)
Source: IWSR, Vinitrac® China, Oct 2021, Oct 2022 and Oct 2023 (n≥1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

China Alternative Wine Opportunity Index

Organic wine and natural wine remain leading players in the Opportunity Index, and sustainably produced wine has improved its position compared to last year

China Alternative Wine Opportunity Index 2024*

		Index score 2024	Score change vs 2022	Score change vs 2023	Rank change vs 2022	Rank change vs 2023
1	Organic wine	**68.2**	5.4	1.7	=	=
2	Natural wine	**67.6**	1.3	0.2	=	=
3	Sustainably produced wine	**58.3**	4.4	3.1	1↑	1↑
4	Environmentally friendly wine	**54.8**	1.4	-1.4	1↑	1↓
5	Pét nat (pétillant naturel)	**53.7**	-3.3	3.0	2↓	=
6	Biodynamic wine	**47.7**	7.3	5.1	7↑	4↑
7	Preservative-free wine	**47.6**	-4.6	-0.7	1↓	1↓
8	Wine from a carbon-neutral winery	**46.7**	0.3	0.8	1↓	1↓
9	Vegan wine	**46.0**	0.6	0.7	1↓	1↓
10	Fairtrade wine	**45.8**	4.0	2.9	1↑	1↓
11	Sulphite-free wine	**45.2**	2.7	3.5	1↓	1↑
12	Orange/skin-contact wine	**45.2**	2.0	2.8	3↓	1↓
13	Vegetarian wine	**42.7**	1.7	1.6	1↓	=

Insights

- Organic wine is the best-known and most-purchased wine across demographics. Chinese drinkers of imported wine continue to associate this wine with being good for their health and aligned with a culture that prioritises health and wellbeing. This is therefore the wine type with most opportunities in this market.
- Natural wine follows closely, associated with a product good for health.

* Index calculation explained in slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average. ↑ / ↓: Ranked higher / lower than previous wave
Base = All Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥1,000)
Source: IWSR, Vinitrac® China, Oct 2021, Oct 2022 and Oct 2023 (n≥1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

Alternative wine awareness

Organic wine remains the best-known alternative wine type in China, followed by natural wine. However, it has seen a short-term decline in its levels of awareness

Alternative wines awareness: Tracking

Awareness: Proportion of RWDs who have heard of the following wines (%)

Awareness	2021 (n=1,000)	2022 (n=1,001)	2023 (n=1,010)	Tracking vs 2021	Tracking vs 2022
Organic wine	55%	56%	52%	→	↓
Natural wine	51%	54%	51%	→	→
Pét nat (pétillant naturel)	47%	43%	41%	↓	→
Sustainably produced wine	33%	33%	35%	→	→
Environmentally friendly wine	33%	38%	34%	→	↓
Preservative-free wine	30%	28%	27%	→	→
Wine from a carbon-neutral winery	27%	26%	26%	→	→
Orange/skin-contact wine	26%	25%	23%	→	→
Vegan wine	27%	26%	23%	↓	→
Fairtrade wine	21%	21%	21%	→	→
Sulphite-free wine	22%	20%	20%	→	→
Biodynamic wine	19%	16%	20%	→	↑
Vegetarian wine	20%	19%	19%	→	→

Insights

- Biodynamic wine is the only alternative wine type that has grown in awareness across demographics.
- Pét nat shows a long-term decrease; among age cohorts, Millennials are the most aware of this alternative wine type.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥1,000)
Source: IWSR, Vinitrac® China, Oct 2021, Oct 2022 and Oct 2023 (n≥1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

Alternative wines sought to purchase

In line with awareness, purchases of biodynamic wines has increased in the past year across demographics

Alternative wines sought to purchase: Tracking

Sought to purchase: Proportion of RWDs who have sought out the below wine types to buy in the past 6 months (%)

Sought to purchase	2021 (n=1,000)	2022 (n=1,001)	2023 (n=1,010)	Tracking vs 2021	Tracking vs 2022
Organic wine	36%	37%	35%	→	→
Natural wine	33%	36%	35%	→	→
Sustainably produced wine	19%	20%	22%	→	→
Pét nat (pétillant naturel)	27%	21%	22%	↓	→
Environmentally friendly wine	19%	22%	19%	→	→
Wine from a carbon-neutral winery	13%	11%	14%	→	↑
Preservative-free wine	17%	14%	13%	↓	→
Orange/skin-contact wine	12%	11%	12%	→	→
Biodynamic wine	8%	8%	11%	↑	↑
Vegan wine	12%	13%	11%	→	→
Fairtrade wine	9%	10%	10%	→	→
Vegetarian wine	9%	9%	10%	→	→
Sulphite-free wine	10%	9%	10%	→	→

Insights

- Purchases of biodynamic wine and wine from carbon-neutral wineries have increased in the past year across demographics.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥1,000)
Source: IWSR, Vinitrac® China, Oct 2021, Oct 2022 and Oct 2023 (n≥1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

Alternative wine consideration and affinity

More imported-wine drinkers are considering buying sustainably produced, pét nat, and orange/skin-contact wines; affinity with natural wine has also increased across demographic groups in China

Alternative wines future purchase consideration/affinity: Tracking

Proportion of RWDs considering future purchase of/with affinity for named wine types (%)

	Future purchase consideration[1]			Affinity[2]		
	2022	2023	Tracking vs 2022	2022	2023	Tracking vs 2022
Organic wine	80%	83%	→	77%	80%	→
Natural wine	78%	82%	→	73%	79%	↑
Sustainably produced wine	72%	79%	↑	69%	72%	→
Environmentally friendly wine	75%	76%	→	67%	67%	→
Fairtrade wine	65%	71%	→	56%	60%	→
Preservative-free wine	66%	70%	→	63%	61%	→
Pét nat (pétillant naturel)	62%	69%	↑	55%	61%	→
Vegan wine	62%	69%	→	57%	60%	→
Sulphite-free wine	63%	69%	→	53%	61%	→
Orange/skin contact wine	59%	68%	↑	54%	56%	→
Wine from a carbon-neutral winery	70%	67%	→	58%	55%	→
Biodynamic wine	66%	65%	→	57%	65%	→
Vegetarian wine	59%	59%	→	55%	56%	→

1 RWDs who will consider buying the named wine type in the future (%). 2 RWDs who think these types of wine are right for people like them (%)
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = those who are aware of at least one alternative wine
Source: IWSR, Vinitrac® China, Oct 2022 and Oct 2023 (n≥1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

Alternative wine awareness

Organic wine is the most popular alternative wine type across age cohorts; more Millennials are aware of pét nat and more Gen Zs are aware of vegetarian wine

Alternative wine awareness by demographic

Proportion of RWDs who have heard of the following wine types (%)

	Semi-annual drinkers of imported wine (n=1,010)	Tracking vs 2022	Gender: Male (n=504)	Gender: Female (n=506)	Age: Gen Z (LDA–26) (n=127)	Age: Millennials (27–42) (n=575)	Age: Gen X (43–58) (n=308)
Organic wine	52%	↓	51%	52%	48%	56%	46%
Natural wine	51%	→	51%	51%	38%	55%	48%
Pét nat (pétillant naturel)	41%	→	40%	43%	33%	48%	33%
Sustainably produced wine	35%	→	35%	35%	29%	35%	37%
Environmentally friendly wine	34%	↓	32%	35%	22%	34%	38%
Preservative-free wine	27%	→	29%	25%	16%	29%	29%
Wine from a carbon-neutral winery	26%	→	24%	27%	21%	28%	23%
Orange/skin contact wine	23%	→	24%	23%	26%	23%	22%
Vegan wine	23%	→	24%	23%	20%	26%	19%
Fairtrade wine	21%	→	22%	20%	20%	22%	19%
Sulphite-free wine	20%	→	20%	21%	23%	21%	18%
Biodynamic wine	20%	↑	20%	20%	20%	20%	21%
Vegetarian wine	19%	→	19%	20%	28%	20%	15%

Green / red: Statistically significantly higher / lower than all Chinese urban upper middle-class semi-annual drinkers of imported wine at a 95% confidence level
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base: All Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥1,000)
Source: IWSR, Vinitrac® China, Oct 2022 and Oct 2023 (n≥1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

Alternative wine purchase

Alternative wine purchase behaviour is largely consistent across age groups, an exception being Gen Z imported wine drinkers, who are less likely to buy natural wine

Alternative wine purchase by demographic

Proportion of RWDs who sought to purchase the named wine types in the past six months (%)

			Gender		Age		
	Semi-annual drinkers of imported wine (n=1,010)	Tracking vs 2022	Male (n=504)	Female (n=506)	Gen Z (LDA–26) (n=127)	Millennials (27–42) (n=575)	Gen X (43–58) (n=308)
Organic wine	35%	→	36%	35%	35%	38%	31%
Natural wine	35%	→	35%	34%	22%	39%	32%
Sustainably produced wine	22%	→	23%	21%	17%	23%	23%
Pét nat (pétillant naturel)	22%	→	23%	21%	19%	25%	17%
Environmentally friendly wine	19%	→	18%	20%	13%	19%	21%
Wine from a carbon-neutral winery	14%	↑	13%	15%	11%	17%	11%
Preservative-free wine	13%	→	14%	12%	7%	14%	13%
Orange/skin contact wine	12%	→	12%	11%	11%	12%	10%
Biodynamic wine	11%	↑	12%	11%	10%	12%	11%
Vegan wine	11%	→	12%	11%	8%	13%	10%
Fairtrade wine	10%	→	10%	10%	9%	11%	9%
Vegetarian wine	10%	→	10%	9%	14%	11%	7%
Sulphite-free wine	10%	→	9%	10%	10%	11%	8%

Green / red: Statistically significantly higher / lower than all Chinese urban upper middle-class semi-annual drinkers of imported wine at a 95% confidence level
↑ / ↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Base: All Chinese urban upper middle-class semi-annual drinkers of imported wine (n≥1,000)
Source: IWSR, Vinitrac® China, Oct 2022 and Oct 2023 (n≥1,000) Chinese urban upper middle-class semi-annual drinkers of imported wine

Alternative wine associations

In line with previous years, organic and natural wines are associated with health benefits while sustainable wine is associated with being a better option for the environment

Alternative wine associations

RWDs who associate alternative wine types with the following statements (%)

	Organic wine	Natural wine	Sustainable wine
Better for my health	37%	38%	29%
More environmentally friendly	30%	32%	41%
Higher quality	36%	36%	28%
Better-tasting	35%	37%	27%
Made with fewer chemical additives	32%	35%	30%
More ethically responsible	25%	26%	38%
More prestigious	28%	27%	24%
Better with food	25%	28%	23%
More expensive	26%	24%	25%
Less processed	23%	31%	22%
Less likely to give me a hangover	26%	26%	21%
Better value for money	23%	26%	22%
Worse-tasting	14%	13%	17%
None of these	2%	2%	2%

Relatively strong associations

Average

Relatively weak associations

Insights

- Organic and natural wines are associated with having fewer additives and being better for health. Their success among Chinese urban upper middle-class semi-annual drinkers of imported wine, is reflective of the Chinese cultural tendency to prioritise health and wellbeing.

Base = All Chinese urban upper middle-class semi-annual drinkers of imported wine (n=1,010)
Source: IWSR, Vinitrac® China, Oct 2023 (n=1,010) Chinese urban upper middle-class semi-annual drinkers of imported wine

Market focus: UK

Market focus: UK

Key takeaways

1. Natural wines overtake Fairtrade

Fairtrade – one of the most popular certifications in UK – has been progressively losing awareness among wine drinkers. This is driven by new LDA market entrants in the younger age cohorts, who are unaware of this certification. Natural wines, however, have been gaining momentum in recent years.

2. Sustainability remains key for wine drinkers

The proportion of climate-conscious wine drinkers has remained stable in the past year, with a positive long-term trend. Similarly, the number of wine drinkers willing to spend more on sustainable products and wines remains strong, despite economic pressure.

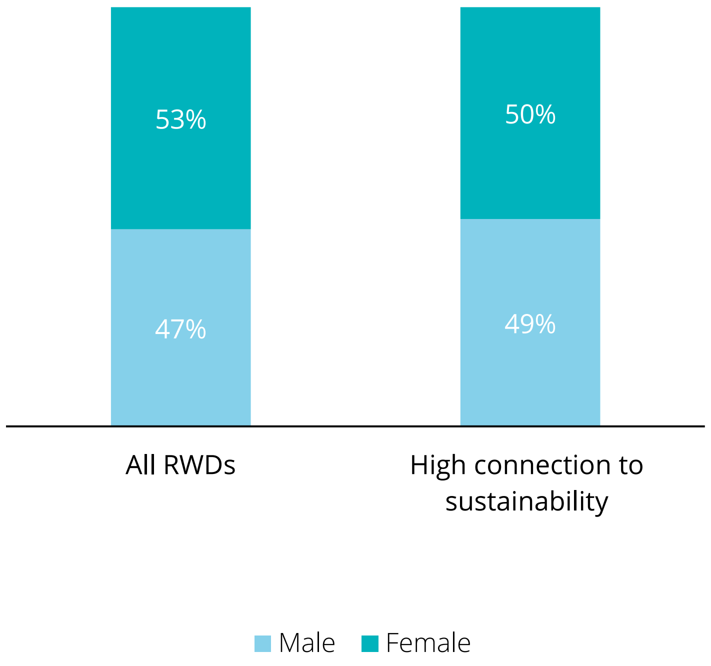
3. Gen Z and Millennials driving growth

Younger age groups are not only highly engaged with sustainability, but also connect with alternative wines on quality grounds. The perception of these wines as better quality and better for you leads these age cohorts to purchase more types of alternative wines.

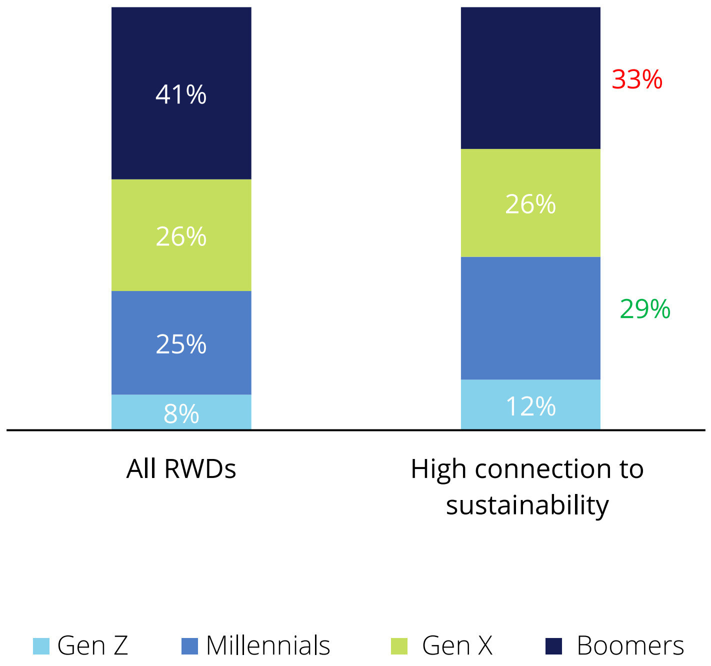
Demographics: High connection to sustainability

Regular wine drinkers highly engaged with sustainability skew younger, and are more likely to purchase alternative wines

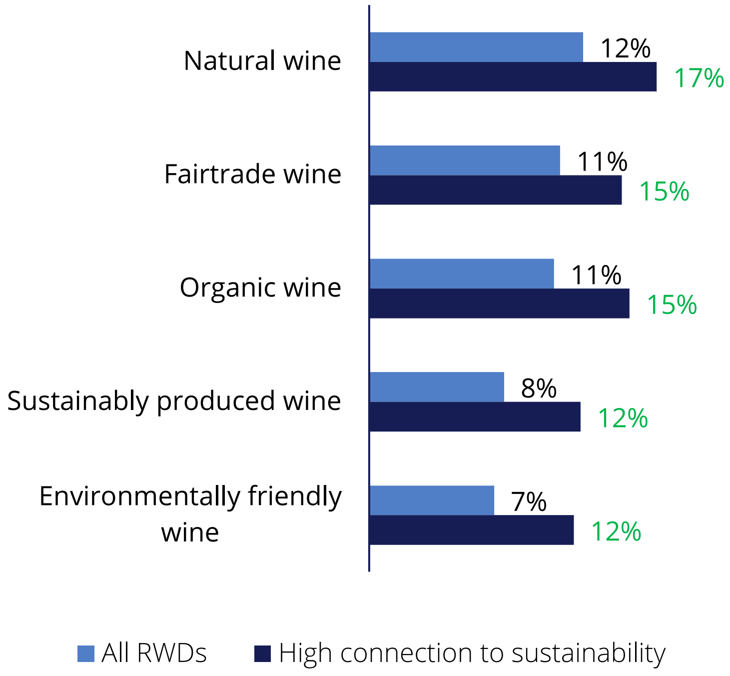
Gender*



Age groups**



Alternative wine purchase: Top 5



* Respondents were given the option of self-describing gender, so male / female proportions may not equal 100. ** Gen Z (18–26), Millennials (27–42), Gen X (43–58), Boomers (59+)
Green / red: Statistically significantly higher / lower than all UK RWDs at a 95% confidence level
Base = All UK regular wine drinkers (RWDs) (n=1,006)
Source: IWSR, Vinitrac® UK, Oct 2023 (n=1,006) UK RWDs

Attitudes to sustainability

Attitudes have remained broadly similar in the past year: two in three UK wine drinkers remain concerned with climate change and try to minimise their impact

Attitudes to sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

General attitudes to sustainability	2021 (n=1,000)	2022 (n=1,013)	2023 (n=1,006)	Tracking vs 2021	Tracking vs 2022
I worry about climate change and try to minimise my personal impact	62%	63%	62%	→	→
I expect the brands I buy to support social causes	37%	43%	43%	↑	→
I always buy sustainable products where possible	38%	44%	42%	→	→
I am willing to pay more for a product that is sustainably produced	38%	43%	40%	→	→
I am willing to give up convenience in return for a product that is sustainably produced	40%	43%	39%	→	→

Attitudes to sustainable food	2021 (n=1,000)	2022 (n=1,013)	2023 (n=1,006)	Tracking vs 2021	Tracking vs 2022
I try to buy food that is grown or produced locally	49%	55%	52%	→	→
I actively eat more/exclusively eat vegetarian or vegan food	28%	35%	28%	→	↓

Insights

Gen Zs and Millennials show higher levels of engagement with sustainability, with more regular wine drinkers from these age cohorts willing to pay more and give up convenience for eco-friendly products.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All UK RWDs (n≥1,000)
Source: IWSR, Vinitrac® UK, Oct 2021, Oct 2022, Oct 2023 (n≥1,000) UK RWDs

Sustainability in wine

Willingness to pay more for sustainably produced wines has remained stable in the UK in the past year, but fewer wine drinkers would choose eco-friendly wines when available

Attitudes to sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

Attitudes to sustainable wine	2021 (n=1,000)	2022 (n=1,013)	2023 (n=1,006)	Tracking vs 2021	Tracking vs 2022
Sustainable wine has fewer chemicals than other wine	41%	52%	50%	↑	→
I only trust the sustainability of wines if they have official certification	43%	52%	49%	↑	→
Wine is a more sustainable product compared with other drinks	36%	46%	41%	↑	↓
I'm willing to pay more for sustainable wine	35%	41%	37%	→	→
I will always buy sustainable wines when given the choice	28%	39%	34%	↑	↓
Sustainable wine is always organically produced	26%	34%	30%	↑	→

Wine packaging and sustainability	2021 (n=1,000)	2022 (n=1,013)	2023 (n=1,006)	Tracking vs 2021	Tracking vs 2022
Glass bottles are a sustainable form of wine packaging	62%	65%	64%	→	→
Bag-in-Box is a sustainable form of wine packaging	33%	41%	39%	↑	→

Insights

More wine drinkers in the Gen Z and Millennial cohorts are willing to pay more for sustainability and purchase sustainable wines when available

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All UK RWDs (n≥1,000)
Source: IWSR, Vinitrac® UK, Oct 2021, Oct 2022, Oct 2023 (n≥1,000) UK RWDs

UK Alternative Wine Opportunity Index

Natural wines have surpassed Fairtrade in the Opportunity Index; while Fairtrade has seen its scores drop for several years, natural wine has risen progressively up the ranks

UK Alternative Wine Opportunity Index 2024*

		Index score 2024	Score change		Rank change	
			vs 2022	vs 2023	vs 2022	vs 2023
1	Natural wine	**49.1**	7.6	4.0	4↑	2↑
2	Fairtrade wine	**48.1**	-4.6	-3.5	1↓	1↓
3	Environmentally friendly wine	**45.6**	3.4	2.9	1↑	2↑
4	Organic wine	**45.3**	1.0	0.6	1↓	=
5	Sustainably produced wine	**44.7**	-0.1	-3.7	3↓	3↓
6	Wine from a carbon-neutral winery	**34.7**	1.2	-5.7	=	=
7	Orange/skin-contact wine	**34.3**	3.4	2.9	1↑	2↑
8	Preservative-free wine	**33.8**	5.1	0.1	1↑	1↓
9	Sulphite-free wine	**33.1**	1.0	0.0	2↓	1↓
10	Biodynamic wine	**27.0**	0.7	-0.4	1↑	=
11	Pét nat (pétillant naturel)	**26.7**	4.8	-0.1	2↑	=
12	Vegan wine	**26.2**	-1.6	-0.2	2↓	=
13	Vegetarian wine	**24.7**	-0.3	-0.8	1↓	=

Insights

- Fairtrade's recent Opportunity Index score declines have been driven by younger LDA wine recruits not being as aware as other age groups of Fairtrade certification in wine.
- On the bright side, the number of drinkers who purchase Fairtrade wine has remained stable. This highlights the importance of focusing efforts of increasing awareness among younger wine drinkers in order to remain relevant in the market.

* Index calculation explained in slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓: Ranked higher / lower than previous wave
Base = All UK RWDs (n≥1,000)
Source: IWSR, Vinitrac® UK, Oct 2021, Oct 2022, Oct 2023 (n≥1,000) UK RWDs

Alternative wine awareness

Organic and Fairtrade are the most popular alternative wines, despite fewer drinkers being aware of them than in the past. Natural wine is the only wine see long-term growth in popularity

Alternative wines awareness: Tracking

Awareness: Proportion of RWDs who have heard of the following wines (%)

Awareness	2021 (n=1,000)	2022 (n=1,013)	2023 (n=1,006)	Tracking vs 2021	Tracking vs 2022
Organic wine	60%	54%	51%	↓	→
Fairtrade wine	55%	50%	41%	↓	↓
Sustainably produced wine	30%	34%	27%	→	↓
Vegan wine	27%	27%	24%	→	→
Natural wine	20%	24%	24%	↑	→
Environmentally friendly wine	18%	22%	21%	→	→
Sulphite-free wine	24%	21%	19%	↓	→
Vegetarian wine	17%	18%	16%	→	→
Preservative-free wine	15%	17%	14%	→	↓
Wine from a carbon-neutral winery	10%	14%	12%	→	→
Orange/skin contact wine	5%	7%	7%	→	→
Biodynamic wine	6%	7%	6%	→	→
Pét nat (pétillant naturel)	5%	5%	4%	→	→

Insights

- Awareness of organic and Fairtrade has waned in recent years. Younger wine drinkers are less aware of these labels. with only one in four Gen Z wine drinkers being aware of Fairtrade wine.
- Natural wine, orange/skin-contact wine and wine from carbon-neutral wineries are most popular among Millennials and Gen Zs when compared to all age groups.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All UK RWDs (n≥1,000)
Source: IWSR, Vinitrac® UK, Oct 2021, Oct 2022, Oct 2023 (n≥1,000) UK RWDs

Alternative wines sought to purchase

All wines have remained constant in the past year. Natural, preservative-free wine and wine from carbon-neutral wineries increased overall since 2021

Alternative wines sought to purchase: Tracking

Sought to purchase: Proportion of RWDs who have sought out the below wine types to buy in the past 6 months (%)

Sought to purchase	2021 (n=1,000)	2022 (n=1,013)	2023 (n=1,006)	Tracking vs 2021	Tracking vs 2022
Natural wine	7%	11%	12%	↑	→
Fairtrade wine	12%	12%	11%	→	→
Organic wine	8%	10%	11%	→	→
Sustainably produced wine	6%	10%	8%	→	→
Environmentally friendly wine	5%	7%	7%	→	→
Preservative-free wine	2%	4%	4%	↑	→
Vegan wine	5%	4%	4%	→	→
Wine from a carbon-neutral winery	2%	5%	3%	↑	→
Vegetarian wine	3%	3%	3%	→	→
Orange/skin contact wine	2%	3%	3%	→	→
Sulphite-free wine	4%	4%	3%	→	→
Biodynamic wine	1%	2%	2%	→	→
Pét nat (pétillant naturel)	1%	2%	1%	→	→

Insights

- Millennials and Gen Zs have sought to purchase the widest repertoire of wine types compared to other age groups.
- Boomers on the other hand are the least likely to buy any alternative wines at all: 61% reported not having sought to purchase any of these wine types.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All UK RWDs (n≥1,000)
Source: IWSR, Vinitrac® UK, Oct 2021, Oct 2022, Oct 2023 (n≥1,000) UK RWDs

Alternative wine consideration and affinity

Consideration and affinity have remained broadly stable across demographics, with the number of those considering future purchase of environmentally friendly wine increasing in the past year

Alternative wines future purchase consideration/affinity: Tracking

Proportion of RWDs considering future purchase of/with affinity for named wine types (%)

	Future purchase consideration[1]			Affinity[2]		
	2022	2023	Tracking vs 2022	2022	2023	Tracking vs 2022
Environmentally friendly wine	61%	71%	↑	66%	69%	→
Natural wine	66%	68%	→	60%	68%	→
Fairtrade wine	69%	67%	→	63%	61%	→
Sustainably produced wine	70%	67%	→	67%	65%	→
Orange/skin-contact wine	49%	65%	→	48%	47%	→
Wine from a carbon-neutral winery	69%	60%	→	60%	52%	→
Sulphite-free wine	52%	58%	→	46%	49%	→
Biodynamic wine	48%	56%	→	41%	37%	→
Organic wine	55%	56%	→	46%	50%	→
Preservative-free wine	60%	52%	→	45%	49%	→
Pét nat (pétillant naturel)	50%	46%	→	37%	38%	→
Vegan wine	38%	43%	→	28%	27%	→
Vegetarian wine	42%	40%	→	34%	32%	→

1 RWDs who will consider buying the named wine type in the future (%). 2 RWDs who think these types of wine are right for people like them (%)
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = those who are aware of at least one alternative wine
Source: IWSR, Vinitrac® UK, Oct 2022, Oct 2023 (n≥1,006) UK RWDs

Alternative wine awareness

Younger age cohorts, as previously mentioned, are more aware of a wider range of alternative wines, while Boomers are aware mainly of organic and Fairtrade

Alternative wine awareness by demographic

Proportion of RWDs who have heard of the following wine types (%)

	All UK RWDs (n=1,006)	Tracking vs 2022	Gender: Male (n=473)	Gender: Female (n=531)	Age: Gen Z (18–26) (n=84)	Age: Millennials (27–42) (n=247)	Age: Gen X (43–58) (n=265)	Age: Boomers (59+) (n=409)
Organic wine	51%	→	48%	53%	43%	41%	48%	60%
Fairtrade wine	41%	↓	39%	43%	24%	36%	43%	47%
Sustainably produced wine	27%	↓	28%	26%	26%	28%	30%	26%
Vegan wine	24%	→	20%	28%	21%	27%	27%	21%
Natural wine	24%	→	30%	18%	43%	35%	20%	15%
Environmentally friendly wine	21%	→	24%	18%	18%	26%	24%	16%
Sulphite-free wine	19%	→	19%	19%	12%	16%	20%	21%
Vegetarian wine	16%	→	16%	17%	18%	20%	19%	12%
Preservative-free wine	14%	↓	16%	12%	26%	20%	11%	9%
Wine from a carbon-neutral winery	12%	→	15%	9%	20%	17%	10%	8%
Orange/skin-contact wine	7%	→	9%	6%	13%	13%	5%	4%
Biodynamic wine	6%	→	8%	5%	5%	7%	8%	4%
Pét nat (pétillant naturel)	4%	→	5%	3%	9%	6%	4%	2%

Green / red: Statistically significantly higher / lower than all UK wine drinkers; ↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All UK RWDs (n≥1,006)
Source: IWSR, Vinitrac® UK, Oct 2022, Oct 2023 (n≥1,006) UK RWDs

Alternative wine purchase

Natural wine, the most preferred alternative wine, is sought to purchase by more Gen Zs/Millennials and male wine drinkers

Alternative wine purchase by demographic

Proportion of RWDs who have heard of the following wine types (%)

	All UK RWDs (n=1,006)	Tracking vs 2022	Gender: Male (n=473)	Gender: Female (n=531)	Age: 18-26 Gen Z (n=84)	Age: 27-42 Millennials (n=247)	Age: 43-58 Gen X (n=265)	Age: 59+ Boomers (n=409)
Natural wine	12%	→	17%	8%	29%	24%	9%	4%
Fairtrade wine	11%	→	11%	10%	7%	7%	15%	12%
Organic wine	11%	→	12%	10%	24%	11%	10%	8%
Sustainably produced wine	8%	→	9%	6%	8%	12%	7%	5%
Environmentally friendly wine	7%	→	9%	6%	8%	15%	7%	2%
Preservative-free wine	4%	→	7%	2%	11%	9%	3%	1%
Vegan wine	4%	→	4%	5%	7%	7%	4%	1%
Wine from a carbon-neutral winery	3%	→	5%	2%	8%	8%	3%	0%
Vegetarian wine	3%	→	3%	3%	7%	6%	2%	1%
Orange/skin-contact wine	3%	→	4%	2%	5%	8%	2%	0%
Sulphite-free wine	3%	→	2%	3%	2%	5%	2%	2%
Biodynamic wine	2%	→	2%	1%	4%	2%	3%	0%
Pét nat (pétillant naturel)	1%	→	2%	1%	5%	3%	1%	0%

Green / red: Statistically significantly higher/lower than all UK wine drinkers; ↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All UK RWDs (n≥1,006)
Source: IWSR, Vinitrac® UK, Oct 2022, Oct 2023 (n≥1,006) UK RWDs

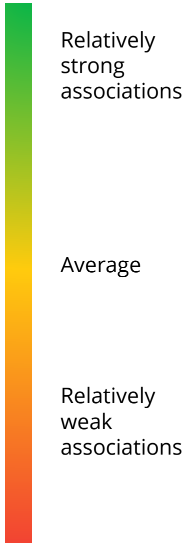
Alternative wine associations

Organic wine is perceived as more expensive than regular wine, while natural wine is associated with fewer interventions and sustainable wine with eco-friendly production

Alternative wine associations

RWDs who associate alternative wine types with the following statements (%)

	Organic Wine	Natural Wine	Sustainable Wine
More expensive	38%	27%	28%
More environmentally friendly	29%	23%	41%
More ethically responsible	26%	20%	36%
Made with fewer chemical additives	31%	30%	18%
Less processed	24%	29%	16%
Better for my health	20%	22%	13%
Higher quality	20%	18%	13%
Better-tasting	15%	19%	10%
Better with food	11%	13%	10%
Less likely to give me a hangover	11%	12%	8%
Better value for money	9%	12%	9%
More prestigious	11%	9%	9%
Worse-tasting	6%	6%	6%
None of these	18%	22%	19%



Insights

- Gen Zs associate organic and natural wines with being higher quality, better-tasting, and better for their health – the key associations driving purchases.
- Boomers perceive organic wines as more expensive than regular wines and have a more neutral image of natural and sustainable wines.

Base = All UK RWDs (n=1,006)
Source: IWSR, Vinitrac® UK, Oct 2023 (n=1,006) UK RWDs

Purchase Intent by wine claim

Fairtrade and 'Award-Winning Winery' remain the claims most likely to drive purchase intent, despite fewer wine drinkers influenced by these labels

Purchase Intent: Tracking*

Proportion of RWDs who would be likely or very likely to purchase wines labelled with the following claims (%)

	2021 (n=1,000)	2022 (n=1,013)	2023 (n=1,006)	Tracking vs 2021	Tracking vs 2022
Fairtrade	57%	57%	54%	→	→
Award-Winning Winery	57%	62%	52%	→	↓
Sustainably Produced	48%	54%	48%	→	→
Established 1870	51%	58%	48%	→	↓
Natural Wine	45%	55%	48%	→	↓
Environmentally Friendly	48%	53%	48%	→	→
Preservative Free	40%	46%	46%	↑	→
Organic	41%	47%	44%	→	→
Control Bottle	45%	49%	41%	→	↓
Sulphite Free Wine	36%	38%	38%	→	→
Carbon-Neutral Winery	42%	40%	37%	→	→
Biodynamic Wine	23%	30%	30%	↑	→
Vegan Wine	22%	31%	27%	↑	→
Vegetarian Wine	25%	30%	26%	→	→
Cannabis Infused	22%	27%	26%	→	→

Insights

- Boomers are the age group less influenced by these terms, while Millennials are the age groups more likely to purchase wines with additional labels.
- Fairtrade is the claim more likely to be purchased by Millennials, with up to 67% selecting this on-pack claim.

* Exercise explained on slide 27
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All UK RWDs (n≥1,000)
Source: IWSR, Vinitrac® UK, Oct 2021, Oct 2022, Oct 2023 (n≥1,000) UK RWDs

Market focus: US

Market focus: US

Key takeaways

1. Willingness to pay more for sustainability impacted

The proportion of sustainable-minded consumers has dropped back to 2021 levels, likely as a result of being displaced by wellness trends and economic pressures. This is leading consumers to re-evaluate their priorities, impacting on their willingness to spend more for sustainable products.

2. Organic and natural wine remain strong

Despite the Opportunity Index falling across most wine types in the past year, organic and natural wines have remained stable. This is driven by Millennials, the main buyers, who connect with natural and organic wine on quality ground, associating these wines with being higher quality and better-tasting.

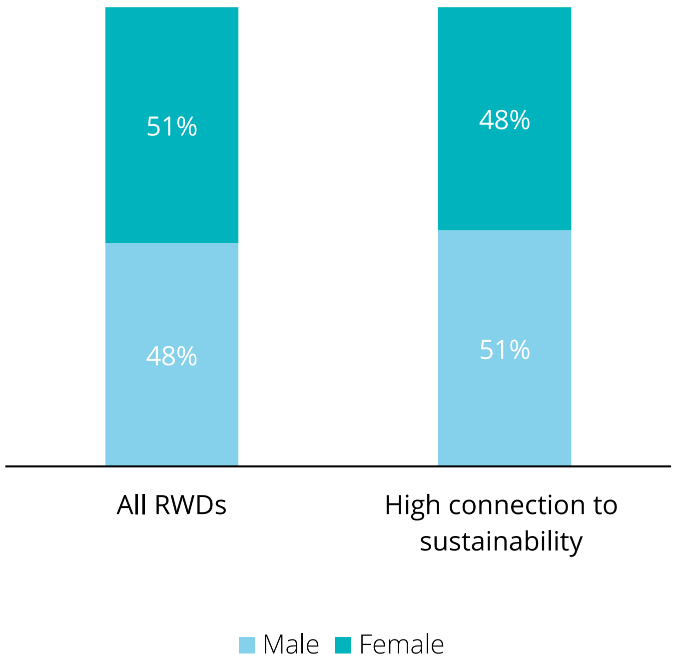
3. Millennials driving growth

Millennials are the age group most engaged with sustainability and showing most positive associations with alternative wines. They have the widest repertoire compared to other age cohorts that are less likely to change wine drinking habits, such as Boomers.

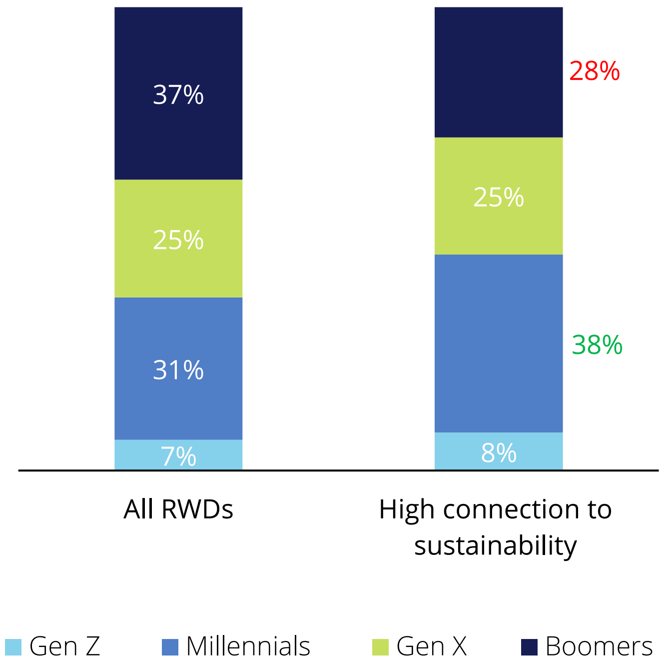
Demographics: High connection to sustainability

Wine drinkers connected with sustainability skew Millennial, and are more likely to purchase more alternative wines than regular wine drinkers (RWDs)

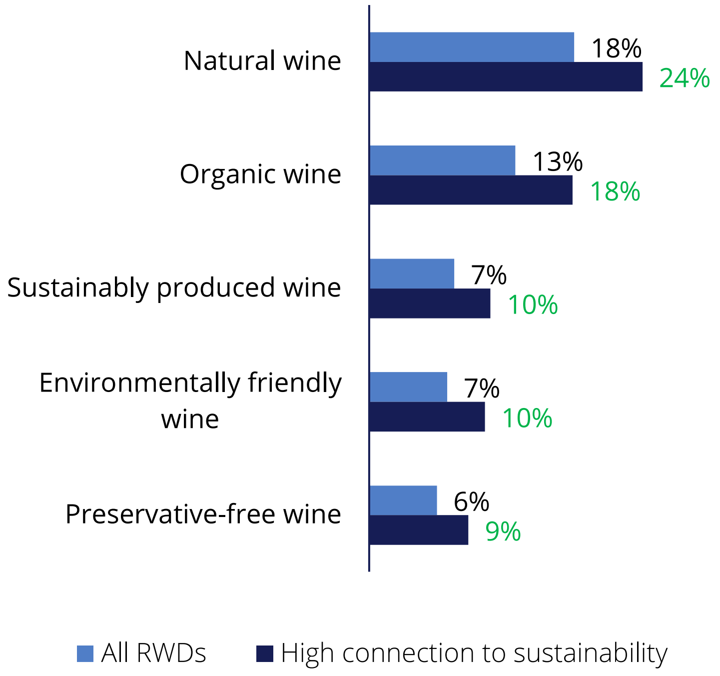
Gender*



Age groups**



Alternative wine purchase: Top 5



* Respondents were given the option of self-describing gender, so male / female proportions may not equal 100. ** Gen Z (21–26), Millennials (27–42), Gen X (43–58), Boomers (59+)
Green / red: Statistically significantly higher / lower than all US RWDs at a 95% confidence level
Base = All US regular wine drinkers (RWDs) (n=2,018)
Source: IWSR, Vinitrac® US, Nov 2023 (n=2,018) US RWDs

Attitudes to sustainability

The proportion of environmentally-conscious wine drinkers has dropped back to 2021 levels. This is likely driven by health and wellness trends and economic pressure leading consumers to re-evaluate their priorities

Attitudes to sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

General attitudes to sustainability	2021 (n=2,000)	2022 (n=2,011)	2023 (n=2,018)	Tracking vs 2021	Tracking vs 2022
I worry about climate change and try to minimise my personal impact	58%	64%	59%	→	↓
I am willing to pay more for a product that is sustainably produced	41%	51%	45%	↑	↓
I am willing to give up convenience in return for a product that is sustainably produced	40%	49%	41%	→	↓
I always buy sustainable products where possible	39%	50%	41%	→	↓
I expect the brands I buy to support social causes	39%	50%	40%	→	↓

Attitudes to sustainable food	2021 (n=2,000)	2022 (n=2,011)	2023 (n=2,018)	Tracking vs 2021	Tracking vs 2022
I try to buy food that is grown or produced locally	58%	65%	61%	→	↓
I actively eat more/exclusively eat vegetarian or vegan food	30%	40%	29%	→	↓

Insights

More Millennials are concerned with climate change, while Boomers are the least engaged with sustainability; this is reflected in their purchase habits.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All US RWDs (n≥2,000)
Source: IWSR, Vinitrac® US, Oct 2021, Nov 2022, Nov 2023 (n≥2,000) US RWDs

Sustainability in wine

In line with a decline in wine drinkers worried about climate change, attitudes towards sustainable wine have changed as well and fewer wine drinkers are willing to pay more or purchase sustainable wines when possible

Attitudes towards sustainability: Tracking

RWDs who agree or strongly agree with each of the below statements (%)

Attitudes towards sustainable wine	2021 (n=2,000)	2022 (n=2,011)	2023 (n=2,018)	Tracking vs 2021	Tracking vs 2022
Sustainable wine has less chemicals than other wine	49%	58%	51%	→	↓
I only trust the sustainability of wines if they have official certification	42%	55%	49%	↑	↓
Wine is a more sustainable product compared with other drinks	45%	55%	48%	→	↓
I'm willing to pay more for sustainable wine	39%	51%	41%	→	↓
Sustainable wine is always organically produced	32%	44%	37%	↑	↓
I will always buy sustainable wines when given the choice	34%	46%	37%	→	↓

Wine packaging and sustainability	2021 (n=2,000)	2022 (n=2,011)	2023 (n=2,018)	Tracking vs 2021	Tracking vs 2022
Glass bottles are a sustainable form of wine packaging	56%	64%	60%	↑	↓
Bag-in-Box is a sustainable form of wine packaging	38%	49%	40%	→	↓

Insights

Millennials rely on official certifications, with up to 62% of this age group trusting only official bodies about sustainability claims.

Glass bottles are widely perceived as more sustainable, particularly by the younger Gen Z and Millennial age cohorts.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All US RWDs (n≥2,000)
Source: IWSR, Vinitrac® US, Oct 2021, Nov 2022, Nov 2023 (n≥2,000) US RWDs

Attitudes to cannabis products

Engagement with cannabis products has decreased in the past year, with approximately one in three regular wine drinkers in the States considering cannabis a good alternative to alcoholic beverages

Attitudes to sustainability: Tracking

% who agree or strongly agree with each of the following statements

Attitudes to cannabis products	2021 (n=2,000)	2022 (n=2,011)	2023 (n=2,018)	Tracking vs 2021	Tracking vs 2022
I think cannabis products are a good alternative to alcoholic beverages	34%	43%	36%	→	↓
I use cannabis products	31%	38%	30%	→	↓

Insights

Gen Zs and Millennials are more engaged with cannabis products than other age cohorts.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All US RWDs (n≥2,000)
Source: IWSR, Vinitrac® US, Oct 2021, Nov 2022, Nov 2023 (n≥2,000) US RWDs

US Alternative Wine Opportunity Index

Opportunity Index across wine types has dropped in the past year. Natural and organic wine remain the dominant wines in the ranking

US Alternative Wine Opportunity Index 2024*

		Index score 2024	Score change		Rank change	
			vs 2022	vs 2023	vs 2022	vs 2023
1	Natural wine	**55.1**	1.3	-2.2	=	=
2	Organic wine	**47.3**	-1.1	-0.7	=	=
3	Environmentally friendly wine	**43.3**	0.4	-4.5	1↑	=
4	Sustainably produced wine	**42.9**	0.0	-1.5	1↓	=
5	Wine from a carbon-neutral winery	**41.6**	3.3	1.0	1↑	1↓
6	Sulphite-free wine	**38.3**	0.8	-1.1	2↑	2↓
7	Preservative-free wine	**38.2**	0.2	-2.0	=	=
8	Fairtrade wine	**37.9**	-0.8	-3.2	3↓	3↑
9	Orange/skin-contact wine	**34.7**	1.2	-2.7	2↑	1↓
10	Cannabis-infused wine	**34.5**	0.4	-4.7	1↓	1↓
11	Biodynamic wine	**34.1**	-2.8	-2.5	1↓	2↑
12	Pét nat (pétillant naturel)	**29.7**	-1.4	-3.5	=	2↓
13	Vegetarian wine	**28.9**	1.4	-4.4	=	=
14	Vegan wine	**28.0**	1.3	-2.2	=	2↑

Insights

- This overall drop, is driven by fewer wine drinkers being aware of or purchasing alternative wines.
- While organic wine is equally known across demographics, natural wine is particularly popular among Millennials, followed by Gen Xs.

* Index calculation explained on slide 16
Numbers in green / red indicate an index score change of +2 or -2 compared to global average; ↑ / ↓: Ranked higher / lower than previous wave
Base = All US RWDs (n≥2,000)
Source: IWSR, Vinitrac® US, Oct 2021, Nov 2022, Nov 2023 (n≥2,000) US RWDs

Alternative wine awareness

Organic wine remains the best-known alternative wine across demographics in the US, and natural wine shows a long-term positive trend

Alternative wines awareness: Tracking

Awareness: Proportion of RWDs who have heard of the following wines (%)

Awareness	2021 (n=2,000)	2022 (n=2,011)	2023 (n=2,018)	Tracking vs 2021	Tracking vs 2022
Organic wine	42%	41%	41%	→	→
Natural wine	30%	36%	33%	↑	→
Sustainably produced wine	22%	26%	24%	→	→
Sulphite-free wine	22%	22%	23%	→	→
Preservative-free wine	18%	20%	20%	↑	→
Environmentally friendly wine	17%	23%	19%	→	↓
Cannabis-infused wine	13%	17%	15%	↑	→
Vegan wine	13%	16%	13%	→	↓
Fairtrade wine	13%	18%	12%	→	↓
Wine from a carbon-neutral winery	11%	14%	12%	→	→
Orange/skin-contact wine	8%	11%	9%	→	↓
Vegetarian wine	8%	12%	8%	→	↓
Biodynamic wine	8%	9%	7%	→	→
Pét nat (pétillant naturel)	5%	8%	5%	→	↓

Insights

- Overall, Millennials are more aware of most types of wines, in comparison to all sample. In particular, natural wine is better-known among Millennials.
- Cannabis-infused wine and orange/skin-contact wines are more popular among Gen Zs.

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All US RWDs (n≥2,000)
Source: IWSR, Vinitrac® US, Oct 2021, Nov 2022, Nov 2023 (n≥2,000) US RWDs

Alternative wines sought to purchase

Natural and organic wines remain resilient, while most wine types experienced a decrease in the number of RWDs seeking to purchase them

Alternative wines sought to purchase: Tracking

Sought to purchase: Proportion of RWDs who have sought out the below wine types to buy in the past 6 months (%)

Sought to purchase	2021 (n=2,000)	2022 (n=2,011)	2023 (n=2,018)	Tracking vs 2021	Tracking vs 2022
Natural wine	16%	20%	18%	→	→
Organic wine	13%	14%	13%	→	→
Sustainably produced wine	6%	9%	7%	→	↓
Environmentally friendly wine	6%	10%	7%	→	↓
Wine from a carbon-neutral winery	4%	6%	6%	↑	→
Sulphite-free wine	5%	7%	6%	→	→
Preservative-free wine	5%	7%	5%	→	↓
Cannabis-infused wine	4%	6%	4%	→	↓
Vegan wine	3%	5%	4%	→	↓
Fairtrade wine	3%	6%	4%	→	↓
Orange/skin-contact wine	3%	5%	4%	→	↓
Biodynamic wine	3%	5%	3%	→	↓
Vegetarian wine	3%	4%	3%	→	↓
Pét nat (pétillant naturel)	2%	3%	2%	→	↓

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All US RWDs (n≥2,000)
Source: IWSR, Vinitrac® US, Oct 2021, Nov 2022, Nov 2023 (n≥2,000) US RWDs

Insights

- Natural wine is the wine type with the highest conversion into purchases rate. This is driven by Millennials, with up to 27% of Millennials having purchased this wine in the past six months.
- Men are more likely to purchase alternative wines than women; natural wine in particular is purchased the most by male wine drinkers.

Alternative wine consideration and affinity

Future purchase consideration levels remain constant, except for biodynamic and vegetarian wines, which have experienced a drop in the past year

Alternative wines future purchase consideration/affinity: Tracking

Proportion of RWDs considering future purchase of/with affinity for named wine types (%)

	Future purchase consideration[1]			Affinity[2]		
	2022	2023	Tracking vs 2022	2022	2023	Tracking vs 2022
Natural wine	72%	72%	→	76%	73%	→
Sustainably produced wine	68%	66%	→	60%	61%	→
Environmentally friendly wine	67%	66%	→	69%	65%	→
Wine from a carbon-neutral winery	64%	65%	→	58%	60%	→
Organic wine	63%	64%	→	57%	58%	→
Fairtrade wine	64%	63%	→	61%	60%	→
Sulphite-free wine	63%	61%	→	52%	54%	→
Preservative-free wine	63%	60%	→	56%	56%	→
Orange/skin-contact wine	57%	60%	→	53%	48%	→
Cannabis-infused wine	56%	58%	→	52%	50%	→
Biodynamic wine	63%	51%	↓	54%	55%	→
Pét nat (pétillant naturel)	46%	48%	→	49%	45%	→
Vegan wine	49%	44%	→	42%	36%	→
Vegetarian wine	51%	41%	↓	43%	45%	→

1 RWDs who will consider buying the named wine type in the future (%). 2 RWDs who think these types of wine are right for people like them (%)
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = those who are aware of at least one alternative wine
Source: IWSR, Vinitrac® US, Nov 2022, Nov 2023 (n≥2,011) US RWDs

Alternative wine awareness

Millennials are the age group most engaged with alternative wines; by contrast, Boomers are less aware of most alternative wine types

Alternative wine awareness by demographic

Proportion of RWDs who have heard of the following wine types (%)

	All US RWDs (n=2,018)	Tracking vs 2022	Gender: Male (n=975)	Gender: Female (n=1,030)	Age: Gen Z (21–26) (n=135)	Age: Millennials (27–42) (n=619)	Age: Gen X (43–58) (n=513)	Age: Boomers (59+) (n=752)
Organic wine	41%	→	41%	41%	36%	43%	40%	41%
Natural wine	33%	→	38%	29%	31%	43%	38%	23%
Sustainably produced wine	24%	→	25%	23%	20%	25%	23%	24%
Sulphite-free wine	23%	→	22%	24%	18%	22%	22%	26%
Preservative-free wine	20%	→	20%	20%	17%	24%	19%	19%
Environmentally friendly wine	19%	↓	20%	19%	19%	25%	16%	16%
Cannabis-infused wine	15%	→	16%	14%	25%	22%	17%	7%
Vegan wine	13%	↓	14%	12%	15%	22%	13%	5%
Fairtrade wine	12%	↓	14%	11%	11%	17%	11%	10%
Wine from a carbon-neutral winery	12%	→	16%	9%	15%	19%	12%	6%
Orange/skin-contact wine	9%	↓	12%	6%	18%	15%	8%	4%
Vegetarian wine	8%	↓	10%	5%	12%	13%	6%	4%
Biodynamic wine	7%	→	10%	5%	14%	11%	9%	3%
Pét nat (pétillant naturel)	5%	↓	7%	3%	6%	9%	5%	2%

Green / red: Statistically significantly higher/lower than all US RWDs at a 95% confidence level; ↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All US RWDs (n≥2,011)
Source: IWSR, Vinitrac® US, Nov 2022, Nov 2023 (n≥2,011) US RWDs

Alternative wine purchase

In line with awareness, Millennials have the widest repertoires, while Boomers are less likely to seek to purchase any of the alternative wines

Alternative wine purchase by demographic

Proportion of RWDs who have heard of the following wine types (%)

	All US RWDs (n=2,018)	Tracking vs 2022	Gender: Male (n=975)	Gender: Female (n=1,030)	Age: Gen Z (21–26) (n=135)	Age: Millennials (27–42) (n=619)	Age: Gen X (43–58) (n=513)	Age: Boomers (59+) (n=752)
Natural wine	18%	→	23%	13%	12%	27%	23%	10%
Organic wine	13%	→	14%	11%	19%	19%	15%	6%
Sustainably produced wine	7%	↓	9%	5%	5%	12%	9%	4%
Environmentally friendly wine	7%	↓	8%	6%	8%	12%	7%	3%
Wine from a carbon-neutral winery	6%	→	8%	4%	9%	9%	8%	2%
Sulphite-free wine	6%	→	6%	5%	5%	8%	6%	4%
Preservative-free wine	5%	↓	7%	4%	7%	9%	7%	2%
Cannabis-infused wine	4%	↓	5%	3%	5%	8%	6%	1%
Vegan wine	4%	↓	6%	2%	9%	6%	6%	1%
Fairtrade wine	4%	↓	5%	3%	6%	6%	5%	2%
Orange/skin-contact wine	4%	↓	5%	3%	8%	7%	5%	1%
Biodynamic wine	3%	↓	4%	1%	7%	5%	3%	1%
Vegetarian wine	3%	↓	4%	1%	3%	6%	2%	1%
Pét nat (pétillant naturel)	2%	↓	3%	1%	3%	4%	1%	0%

Green / red: Statistically significantly higher/lower than all US RWDs at a 95% confidence level; ↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All US RWDs (n≥2,011)
Source: IWSR, Vinitrac® US, Nov 2022, Nov 2023 (n≥2,011) US RWDs

Alternative wine associations

Organic wine remains associated with being more expensive, while sustainable wine is perceived as the most environmentally friendly

Alternative wine associations

RWDs who associate alternative wine types with the following statements (%)

	Organic wine	Natural wine	Sustainable wine
More expensive	35%	24%	25%
Made with fewer chemical additives	35%	30%	17%
More environmentally friendly	26%	20%	36%
Less processed	24%	29%	16%
Better for my health	29%	26%	13%
More ethically responsible	20%	16%	30%
Higher quality	21%	22%	14%
Better-tasting	17%	22%	15%
Better with food	12%	16%	10%
Better value for money	10%	15%	11%
More prestigious	11%	11%	9%
Less likely to give me a hangover	11%	12%	8%
Worse-tasting	7%	7%	8%
None of these	14%	17%	18%

Relatively strong associations

Average

Relatively weak associations

Insights

- US wine drinkers have different associations within generations.
- Boomers have stronger associations with organic wines being expensive and sustainable wine as more environmentally friendly. These associations are not as strong in younger age groups, and organic wines are considered to be higher quality and better-tasting.

Base = All US RWDs (n=2,018)
Source: IWSR, Vinitrac® US, Nov 2023 (n=2,018) US RWDs

Purchase Intent by wine claim

Most wine types have experienced a decline in purchase intent in the past year, except for 'Award-Winning Winery', highlighting the importance of high quality as a driver of choice among consumers

Purchase Intent: Tracking

RWDs who would be likely or very likely to purchase wines labelled with the following claims (%)

	2021 (n=2,000)	2022 (n=2,011)	2023 (n=2,018)	Tracking vs 2021	Tracking vs 2022
Award-Winning Winery	56%	64%	60%	→	→
Wine Made from Organic Grapes	52%	63%	57%	→	↓
Established 1870	51%	61%	55%	→	↓
Natural Wine	53%	67%	53%	→	↓
Preservative-Free	51%	59%	52%	→	↓
Sustainably Produced	46%	55%	51%	→	↓
Environmentally Friendly	45%	54%	48%	→	↓
Control Bottle	44%	55%	48%	↑	↓
USDA Organic logo	43%	54%	46%	→	↓
Fairtrade Wine	45%	53%	46%	→	↓
Sulphite-Free Wine	45%	55%	45%	→	↓
Carbon-Neutral Winery	39%	48%	41%	→	↓
Cannabis-Infused	38%	46%	38%	→	↓
Biodynamic Wine	30%	42%	36%	↑	↓
Vegetarian Wine	30%	40%	32%	→	↓

Insights

- 'Award-Winning Winery' is particularly impactful amongst Millennials, with up to 70% more likely to purchase a wine bearing this label. On the other hand, Boomers are the age cohort influenced the least by this labelling.

* Exercise explained on slide 27
↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Base = All US RWDs (n≥2,000)
Source: IWSR, Vinitrac® US, Oct 2021, Nov 2022, Nov 2023 (n≥2,000) US RWDs

Methodology

Australia methodology

- Data has been collected in Australia since 2021.
- The October 2021 and 2022 waves were tracked against November 2023.
- Data was gathered via Vinitrac® online survey.
- Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-premise or in the on-premise.
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.
- The data is representative of Australian regular wine drinkers (RWDs) in terms of gender, age and region.
- The distribution of the sample is shown in the table.

		Oct 21	Oct 22	Nov 23
	n=	1,000	1,009	1,007
Gender*	Male	58%	55%	50%
	Female	42%	44%	50%
	Total	***100%***	***99%***	***100%***
Age	18-24	8%	8%	7%
	25-34	21%	21%	20%
	35-44	23%	21%	20%
	45-54	18%	17%	16%
	55-64	11%	12%	14%
	65 and over	18%	20%	22%
	Total	***100%***	***100%***	***100%***
Region	Australian Capital Territory	2%	2%	1%
	New South Wales	36%	35%	34%
	Northern Territory	1%	1%	1%
	Queensland	19%	19%	19%
	South Australia	6%	7%	6%
	Tasmania	2%	2%	2%
	Victoria	25%	27%	28%
	Western Australia	9%	8%	9%
	Total	***100%***	***100%***	***100%***

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

Canada methodology

- Data has been collected in Canada since 2021.
- The October 2021 and November 2022 waves were tracked against November 2023.
- Data was gathered via Vinitrac® online survey.
- Respondents were screened to ensure that they were at least 19 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-premise or in the on-premise.
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.
- The data is representative of Canadian regular wine drinkers (RWDs) in terms of gender, age and Province.
- The distribution of the sample is shown in the table.

		Oct 21	Nov 22	Nov 23
	n=	1,834	1,220	1,020
Gender*	Male	51%	48%	46%
	Female	49%	51%	52%
	Total	***100%***	***99%***	***99%***
Age	19-24	5%	7%	8%
	25-34	22%	20%	18%
	35-44	20%	19%	19%
	45-54	17%	17%	16%
	55-64	16%	16%	16%
	65 and over	19%	21%	22%
	Total	***100%***	***100%***	***100%***
Province	Quebec	29%	29%	28%
	Ontario	38%	38%	39%
	West	28%	25%	28%
	Other Provinces	4%	7%	5%
	Total	***100%***	***100%***	***100%***

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

China methodology

- Data has been collected in China since 2021.
- The October 2021 and 2022 waves were tracked against October 2023.
- Data was gathered via Vinitrac® online survey.
- Respondents were screened to ensure that they met the following requirements:
  - Aged 18–54
  - Urban upper middle-class: personal monthly income before tax of at least 6,000 RMB in Beijing, Guangzhou, Shanghai, Hangzhou and Shenzhen; or at least 5,000 RMB in Wuhan, Chengdu, Shenyang, Chongqing, Changsha, Zhengzhou and Guiyang
  - Residents of Beijing, Guangzhou, Shanghai, Wuhan, Chengdu, Shenyang, Hangzhou, Shenzhen, Chongqing, Changsha, Zhengzhou and Guiyang
  - Drank imported grape-based wine at least twice a year
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.
- The data is representative of Chinese urban upper middle-class drinkers of imported wine in terms of gender, age, city and income.
- The distribution of the sample is shown in the table.

		Oct 21	Oct 22	Oct 23
	n=	1,000	1,001	1,010
Gender	Male	53%	51%	50%
	Female	47%	49%	50%
	Total	***100%***	***100%***	***100%***
Age	18-24	7%	8%	8%
	25-29	24%	13%	14%
	30-34	18%	24%	22%
	35-39	15%	16%	16%
	40-44	16%	14%	14%
	45-49	10%	15%	15%
	50-54	9%	10%	12%
	Total	***100%***	***100%***	***100%***
City	Shanghai, Hangzhou	25%	22%	21%
	Beijing	17%	11%	12%
	Shenyang, Zhengzhou	9%	8%	9%
	Guangzhou, Shenzhen	19%	26%	24%
	Changsha, Wuhan	7%	10%	10%
	Chengdu, Guiyang	12%	12%	12%
	Chongqing	11%	10%	11%
	Total	***100%***	***100%***	***100%***
Personal monthly income before tax	Less than 9,000 RMB	27%	26%	23%
	9,000-11,999 RMB	34%	31%	31%
	12,000+ RMB	39%	43%	46%
	Total	***100%***	***100%***	***100%***
Imported wine consumption frequency	2-5 times per year	15%	15%	20%
	About once every two months	24%	24%	20%
	1-3 times per month	38%	38%	39%
	Once a week or more often	23%	23%	21%
	Total	***100%***	***100%***	***100%***

UK methodology

- Data has been collected in the UK since 2021.
- The October 2021 and 2022 waves were tracked against October 2023.
- Data was gathered via Vinitrac® online survey.
- Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-trade or in the on-trade.
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.
- The data is representative of UK regular wine drinkers (RWDs) in terms of gender, age, annual pre-tax household income and region.
- The distribution of the sample is shown in the table.

		Oct 21	Oct 22	Oct 23
	n=	1,000	1,013	1,006
Gender*	Male	44%	47%	47%
	Female	56%	52%	53%
	Total	***100%***	***99%***	***100%***
Age	18-24	5%	6%	6%
	25-34	9%	13%	14%
	35-44	13%	16%	16%
	45-54	17%	18%	17%
	55-64	20%	17%	18%
	65+	36%	32%	29%
	Total	***100%***	***100%***	***100%***
Annual household income before taxes	Under £20,000	11%	12%	13%
	£20,000 - £29,999	19%	15%	9%
	£30,000 - £39,999	18%	24%	26%
	£40,000 - £59,999	17%	15%	12%
	£60,000+	23%	28%	30%
	Don't know / Refused**	13%	5%	10%
	Total	***100%***	***100%***	***100%***
Region	North	23%	22%	23%
	Midlands	16%	16%	16%
	South East + East	27%	26%	26%
	London	10%	12%	13%
	South West	8%	7%	7%
	Wales	7%	5%	5%
	Scotland	8%	8%	8%
	Northern Ireland	2%	3%	3%
	Total	***100%***	***100%***	***100%***

*Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas
**'Don't know / refused' in Income fell naturally in the sample

US methodology

- Data has been collected in the US since 2021
- The October 2021 and November 2022 waves were tracked against November 2023.
- Data was gathered via Vinitrac® online survey.
- Respondents were screened to ensure that they were at least 21 years old; drank red, white, rosé or blush wine at least once a month; and bought wine in the off-premise or in the on-premise.
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.
- The data is representative of US regular wine drinkers (RWDs) in terms of gender, age, US Divisions and annual pre-tax household income.
- The distribution of the sample is shown in the table.

		Oct 21	Nov 22	Nov 23
	n=	2,000	2,011	2,018
Gender*	Male	43%	46%	48%
	Female	57%	54%	51%
	Total	***100%***	***100%***	***99%***
Age	21-24	4%	4%	5%
	25-34	14%	19%	18%
	35-44	19%	18%	17%
	45-54	16%	18%	17%
	55-64	19%	18%	18%
	65 and over	28%	24%	25%
	Total	***100%***	***100%***	***100%***
US Divisions	New England	6%	4%	5%
	Middle Atlantic	17%	16%	15%
	East North Central	13%	16%	14%
	West North Central	7%	5%	6%
	South Atlantic	20%	21%	20%
	East South Central	6%	4%	4%
	West South Central	11%	11%	10%
	Mountain	6%	6%	7%
	Pacific	15%	18%	18%
	Total	***100%***	***100%***	***100%***
Annual household income before taxes	Under $50,000	28%	25%	26%
	$50,000 - $99,999	31%	32%	31%
	$100,000+	35%	41%	39%
	Prefer not to answer**	6%	2%	4%
	Total	***100%***	***100%***	***100%***

*Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas
**'Don't know / refused' in Income fell naturally in the sample

About
IWSR Drinks Market Analysis

IWSR is the leading source of data and intelligence on the beverage alcohol market. The IWSR database, essential to the industry, quantifies the global market of wine, spirits, beer, cider and RTDs (ready-to-drink) by volume and value in 160 countries, and provides insight into short- and long-term trends, including five-year volume and value forecasts, as well as consumer behaviour. IWSR tracks overall consumption and trends at brand, price segment and category level. Our data is used by the major international wine, spirits and beer companies, as well as financial and beverage-alcohol market suppliers.

IWSR's unique methodology allows us to get closer to what is actually consumed and better understand how markets work. IWSR boasts a team of global analysts, each of whom is equipped with local market expertise and an expansive network of on-the-ground industry contacts. Our analysts meet and speak with their industry contacts throughout the year to capture local insight, key market trends, and the 'why' behind the numbers.

IWSR drinks market analysis

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