



TRENDS IN SALES OF WINE – A RETAIL PERSPECTIVE

Wine Market Observatory
November 2021

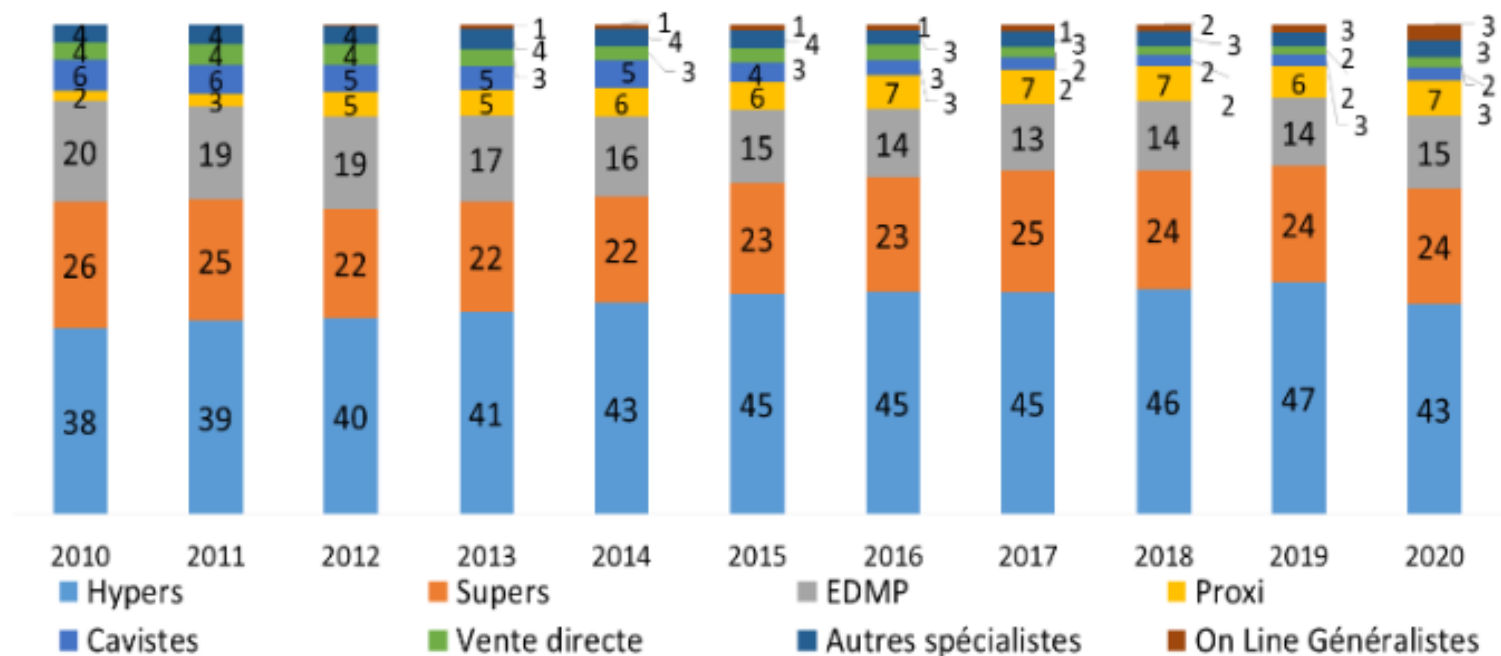
France

Still Wine : retail



Hypermarkets and supermarkets account for the bulk of still wine purchases, regardless of category. Discounters and convenience stores are over-represented in foreign wine purchases, while direct sales, wine merchants and other specialists are over-represented in standard PDO and PGI.

Répartition en volume des achats de vins tranquilles par type de circuits de 2010 à 2020 (en %)



Source: IRI - FranceAgrimer

France



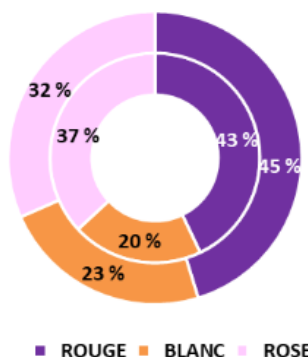
Still Wine : consumption (home consumption)

According to Kantar, household **consumption of wine decreased by -5,2% in volume during the first 9 months of 2021** (vs -0,8% in volume in 2020). **The consumption decreased by -1,1% in value.**

Consumers tended to buy **more expensive wines**, in contrast to previous years. The average price was €4.73 per litre, up 4.3% on 2020 and +5% on the 2018-2020 average.

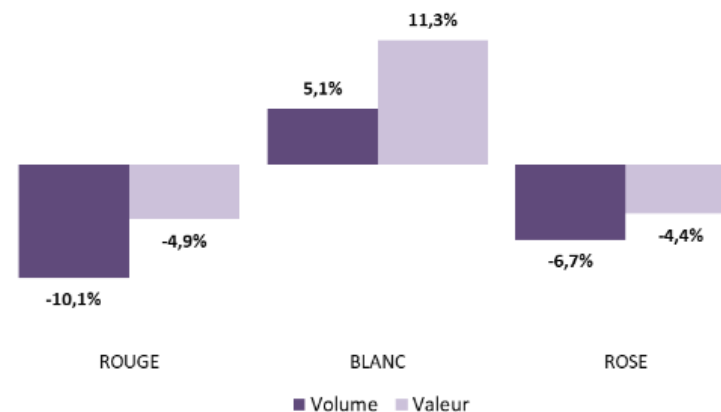
In terms of colors, only **white wine** purchases increased in 2021 (+5.1% in volume and +11.3% in value).

Structure des ventes de vins tranquilles par couleur sur le cumul de janvier à septembre 2021



Cercle interne : volume
Cercle externe : valeur

Evolutions des ventes de vins tranquilles en grande distribution par couleur sur le cumul de janvier à septembre 2021 (vs moy. 2018/20)



Contour : HM+SM+EDMP FR+E-commerce GSA+Proxi
Source : IRI – élaboration FranceAgriMer

France

Still Wine : consumption (home consumption)



According to IRI, still wine sales fell by 3.4% in volume in the first half of 2021, but rose by 2.5% in value.

The growth dynamic was particularly strong for white wines (+5,8% in volume and +12,7% in value).

In terms of packaging, only sales of non-returnable glass (75 cl bottle) have increased (+2,8% in volume and +8,4% in value).

Note also the increase in sales of PDO wines (+0,9% in volume, +6,7% in value).

Total HM + SM + HDF + proxi + e-commerce	Ventes en volume en millions de litres	Évolution sur un an des ventes en volume	Ventes en valeur en millions d'euros	Évolution sur un an des ventes en valeur	Prix moyen en €/litre	Évolution sur un an du prix moyen
VINS TRANQUILLES	430,64	-3,4%	2022,20	+2,5% ↗	4,70	+6,1%
MDD	169,05	-6,6%	651,27	-3,1% ↘	3,85	+3,8%
Rouges	195,48	-5,7%	970,63	+1,3% ↗	4,97	+7,4%
Blancs	90,36	+5,8%	490,11	+12,7% ↗	5,42	+6,5%
Rosés	144,80	-5,4%	561,46	-3,3% ↘	3,88	+2,3%
Verre perdu 75 cl	209,86	+2,8%	1386,26	+8,4% ↗	6,61	+5,4%
PET	13,58	-0,2%	28,49	+0,1% ↗	2,10	+0,2%
Brique	1,42	-6,1%	4,08	-4,4% ↘	2,87	+1,9%
Cubitainer	5,51	-21,5%	8,57	-22,0% ↘	1,56	-0,6%
Bag-in-Box®	187,62	-9,0%	529,55	-9,8% ↘	2,82	-0,9%
Doypack/Pouch®	2,02	-19,6%	9,43	-19,5% ↘	4,67	+0,2%
AOP	186,20	+0,9%	1296,79	+6,7% ↗	6,96	+5,8%
IGP cépages	89,29	-6,3%	304,65	-4,6% ↘	3,41	+1,8%
IGP standards	53,62	-7,3%	190,31	-2,9% ↘	3,55	+4,8%
Vins étrangers hors VSIG	4,98	-5,3%	23,98	-0,4% ↘	4,81	+5,2%
VSIG dont:	96,55	-6,0%	206,48	-5,7% ↘	2,14	+0,4%
VSIG France	28,74	+2,9%	73,50	+5,3% ↗	2,56	+2,4%
VSIG UE	35,01	-5,3%	70,66	-6,5% ↘	2,02	-1,3%
VSIG États membres	32,79	-13,2%	62,32	-15,2% ↘	1,90	-2,3%

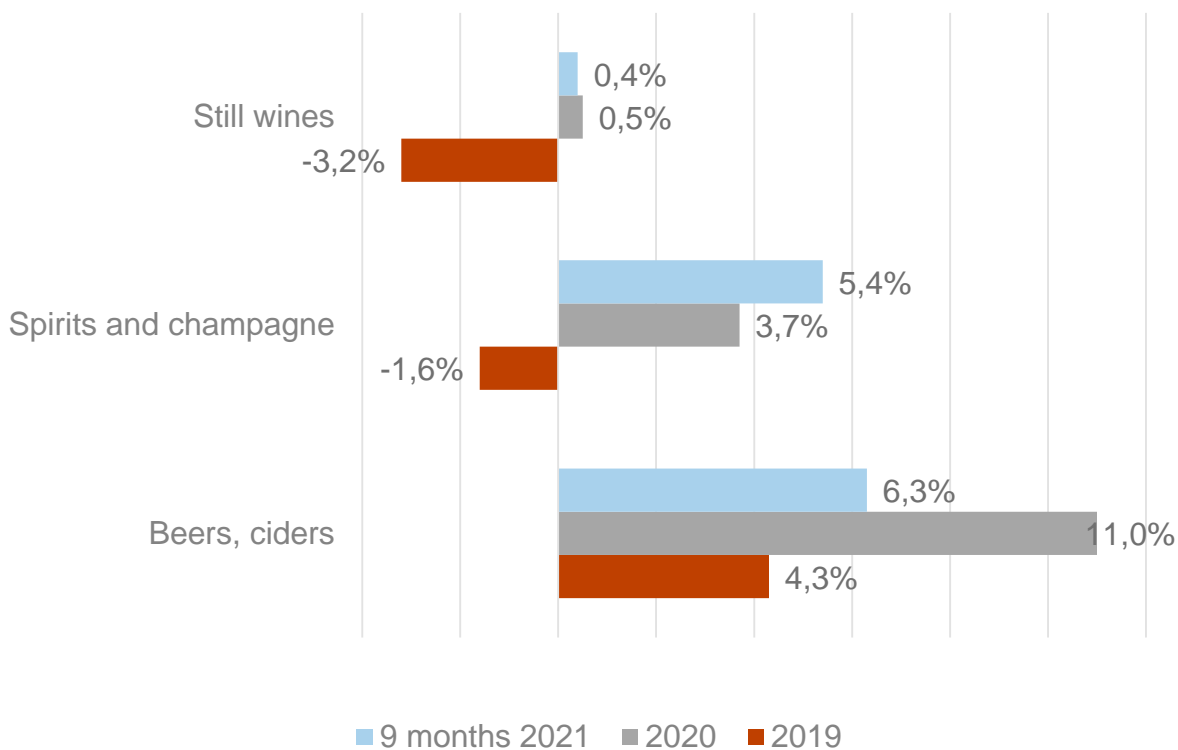
Source : Iri, HM + SM + proxi + e-commerce, cumul courant au 20 juin 2021



Sales in hypermarkets and supermarkets (% in value)

According to IRI, the sales of still wines increased by 0,4% in value during the first 9 months of 2021.

Growth has been much more robust for spirits and champagne (+5,4%) and beers & ciders (+6,3%).



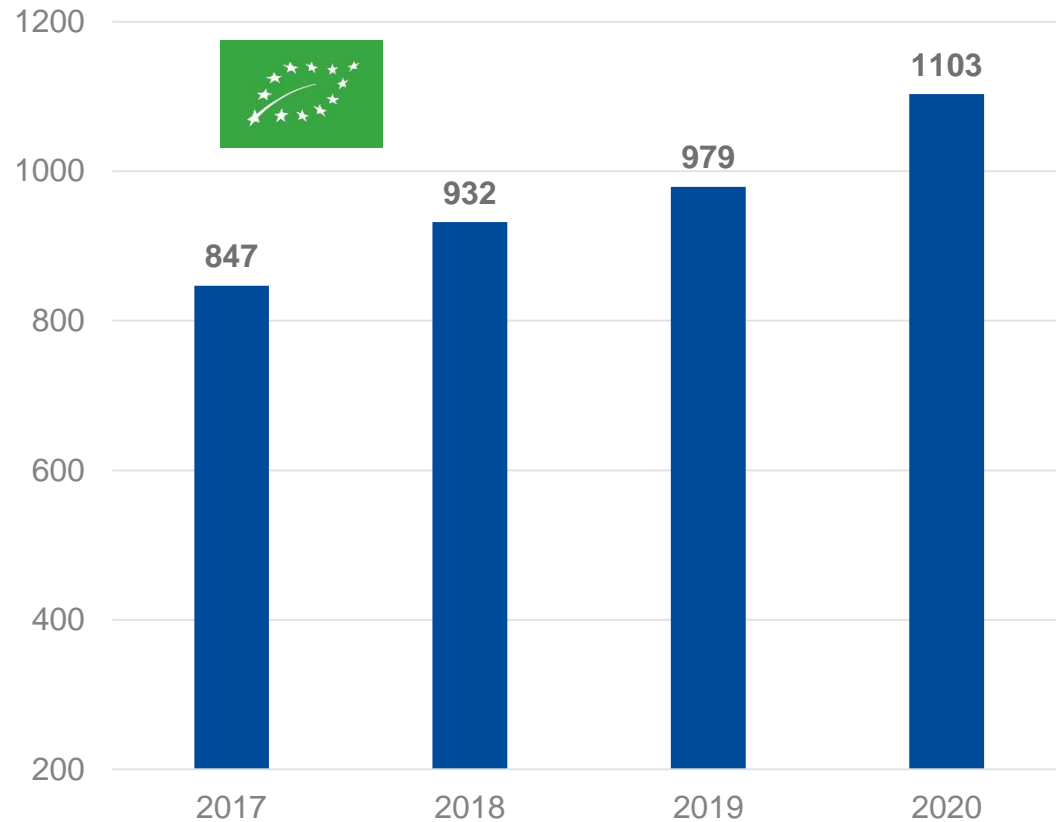
Source : IRI (HM+SM+Discount+Ecommerce)



Organic wine purchases by the French were estimated to **be worth 1.103 million euros in 2020**, an increase of 13% compared to 2019.

In one decade, between 2010 and 2020, the market has grown four-fold.

Organic Wine Consumption (M€)



Source : Agence Bio



According to INSEE data, the turnover of wine merchants jumped by 25% in value in the first 7 months of 2021 compared to the same period in 2020. This rebound comes after an average annual decline of 2.7% in 2020, due to the closure of many stores in 2020.

	Fruits & vegetables	Butchers	Wine shops	Fish shops
2015	11,0%	1,3%	8,7%	3,8%
2016	11,1%	3,1%	10,6%	3,0%
2017	11,2%	2,4%	7,7%	3,5%
2018	9,7%	4,4%	7,7%	2,0%
2019	9,0%	4,1%	5,8%	4,2%
2020	15,4%	11,9%	-2,7%	7,3%
Jan-juil 2021	10,7%	7,4%	25,4%	28,4%

Source: INSEE

France

Online sales



Online wine sales have been growing over the years: with an estimated value of 600 million € in 2020, and more than 500 active websites according to FranceAgriMer, it represents 9% of national consumption in value. The share is still modest, but France is at the forefront of this digital market which, above all, is constantly growing. In particular in 2020, where deliveries have exploded with the pandemic.

The share of online wine buyers would have increased from 31% in 2019 to 46% in 2020.

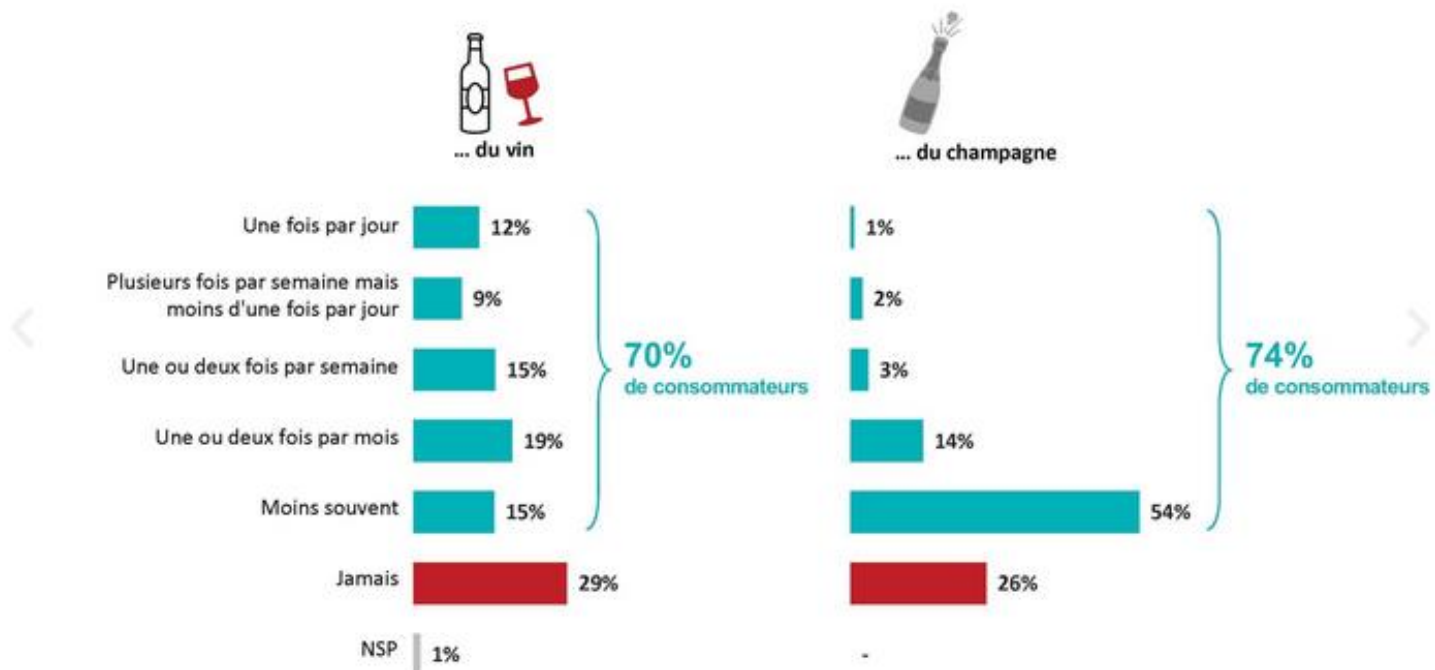
Competition has tended to increase in recent years, with the arrival of new players (pure players) but also the development of specialised websites by generalists such as large food stores.

HM-SM	Private sale	Online generalists	Pure players (specialists)	Wine merchants
 	 	 	   	 



La fréquence d'achat de vin et de champagne

Q. A quelle fréquence achetez-vous... ?





Les lieux d'achat de vin et de champagne

Q. Parmi ces propositions, dans quel(s) lieu(x) achetez-vous ... ?

Plusieurs réponses possibles - Total supérieur à 100%



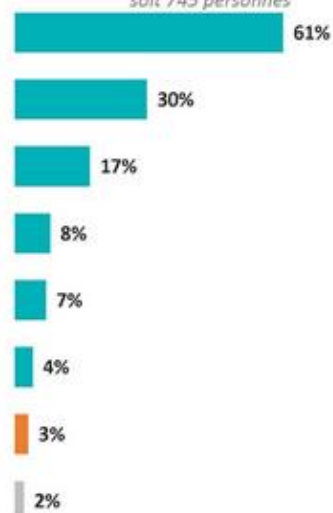
... du vin

Question posée uniquement aux consommateurs de vin,
soit 708 personnes



... du champagne

Question posée uniquement aux consommateurs de champagne,
soit 745 personnes



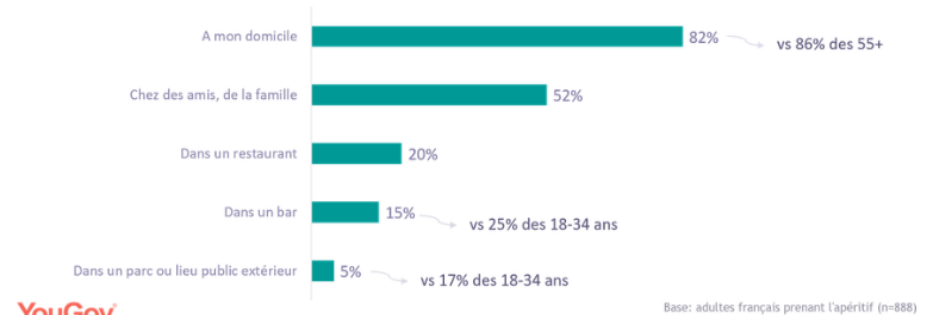
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French people & the “aperitif”



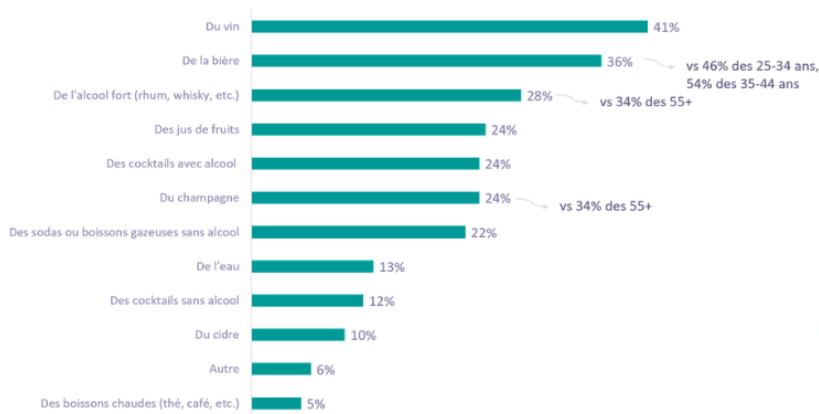
74% of the French say they have an aperitif at least once a month, and 49% at least once a week. The 25-34 year seem to be the biggest fans: 57% say they have an aperitif at least once a week. The majority of French people have an aperitif with their family (56%). In addition, 46% usually do so with friends, 40% with their partner and 8% with colleagues. It should also be noted that more than one person in ten is in the habit of having an aperitif alone (12%). The majority of French people who have an aperitif usually do so at home (82%), or at a friend's house (52%)

La majorité des Français prenant l'apéritif ont l'habitude de le faire chez eux (82%), ou chez des proches (52%).



YouGov

Le **vin** est la boisson qui ressort le plus chez les Français qui prennent l'apéritif (**41%**). La bière (36%) et l'alcool fort (28%) viennent compléter le Top 3 des boissons consommées.



YouGov

Base: adultes français prenant l'apéritif (n=888)

At national level, alcoholic drinks are still the preferred choice for aperitifs (84% with alcohol vs. 41% without).

On the other hand, this trend is much less strong among young people: 72% say they usually drink alcoholic drinks and 69% non-alcoholic drinks.

Wine is the drink that stands out most among French people who drink aperitifs (41%). Beer (36%) and hard liquor (28%) complete the top three drinks consumed.

