



WP 2.5

Market Perspectives

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Context

- ✦ Development of the organic wine market in the EU and in the world
- ✦ Increase of imports of organic wines in Northern European countries,
- ✦ Very little information about the organic wine market

Objectives

To get a picture about the potential and the trends of the organic wine market (domestic and international).



Part 1 :

The Organic Wines Operators



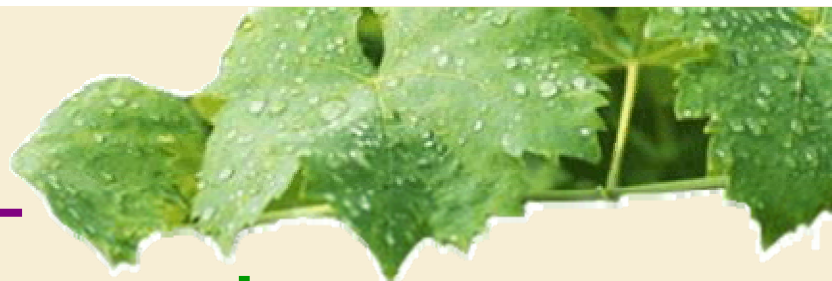
Methodology

Study divided in two parts :

👂 **1st step** : 25 surveys in D(8), I(7),
CH(3), F(7)

👂 **2nd step** : 45 surveys in European
producing countries (24), European non
producing countries (16), non European
countries (5)

*A majority of operators (16) from the 1st step also participated
in the 2nd step*



Origins of the operators

Country	Number of operators	European producing countries	European non producing countries	Non European countries
A	1	1		
Can	1			1
CH	4	4		
D	10	10		
DK	6		6	
F	9	9		
Fin	1		1	
Ir	2		2	
It	9	9		
Jp	2			2
Nw	1		1	
Tw	1			1
UK	5		5	
USA	2			2
Total	54	33	15	6



Profile of companies surveyed

- * Wholesaler : 22
- * Wine trader : 18
- * Producer & Trader : 2
- * Retailer : 18
- * Importer : 27

50% specialized in organic, 50% non specialized



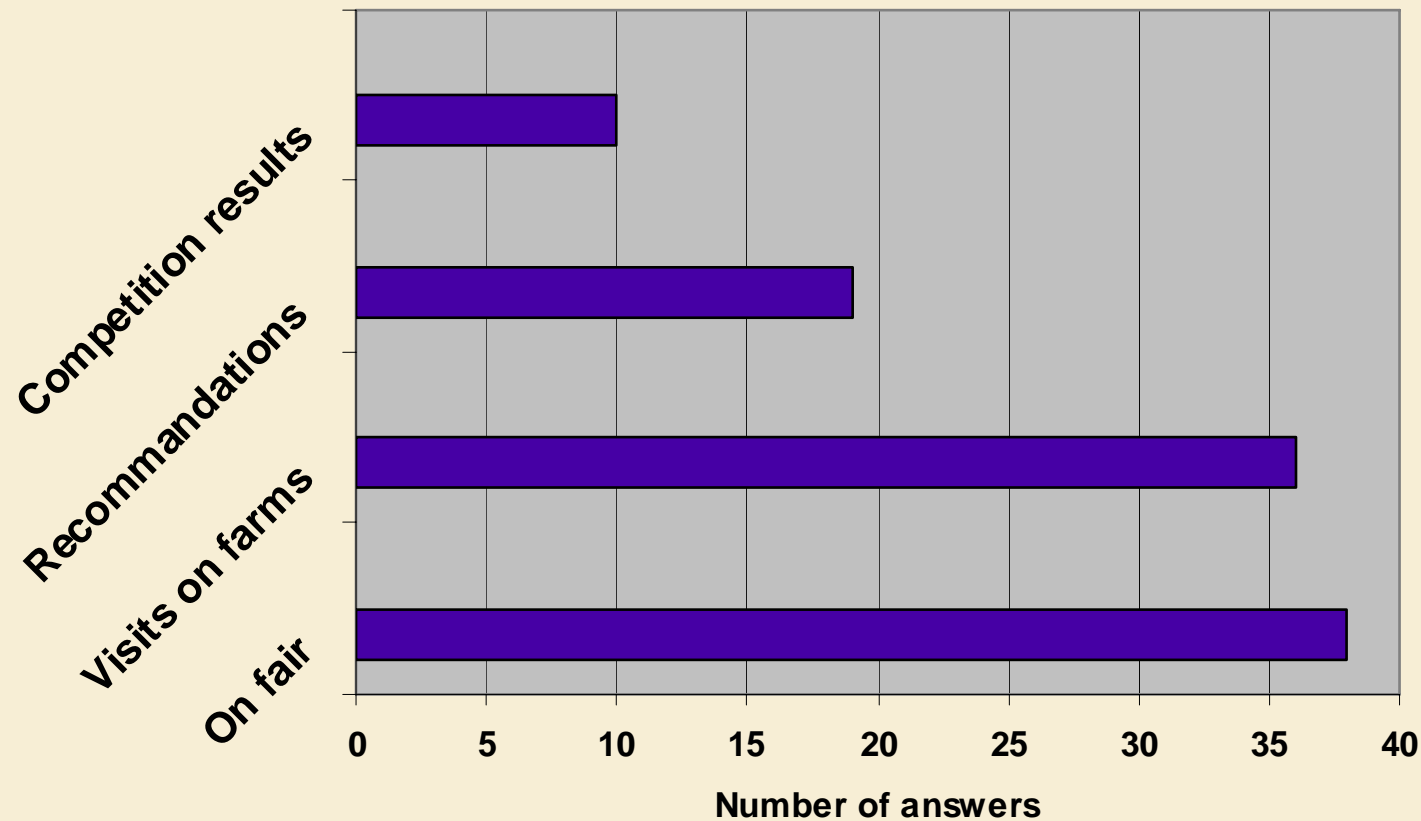
Trend of the turnover growth for organic wines

Increase of **annual turnover for organic wine in last 5 years** from 5% to 90%, with a mean of about 18%.

Increase of **expected annual turnover for organic wine until 2008** from 6% to 20%, with a mean of about 13%.

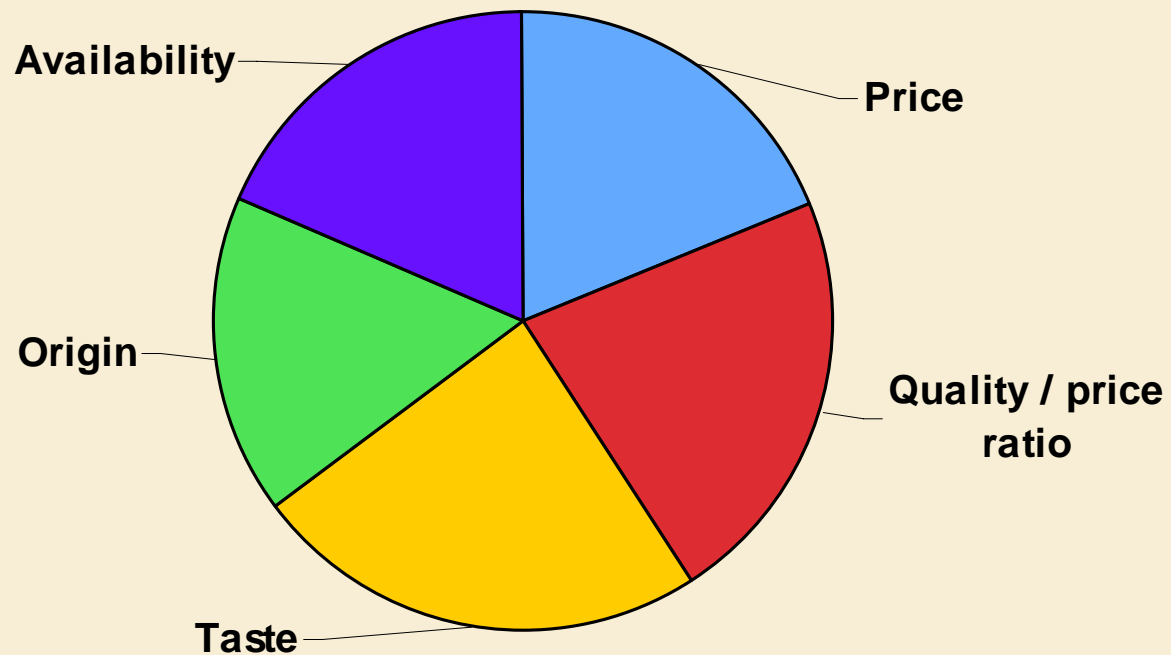


Ways to select organic wines





Criteria to select new organic wines

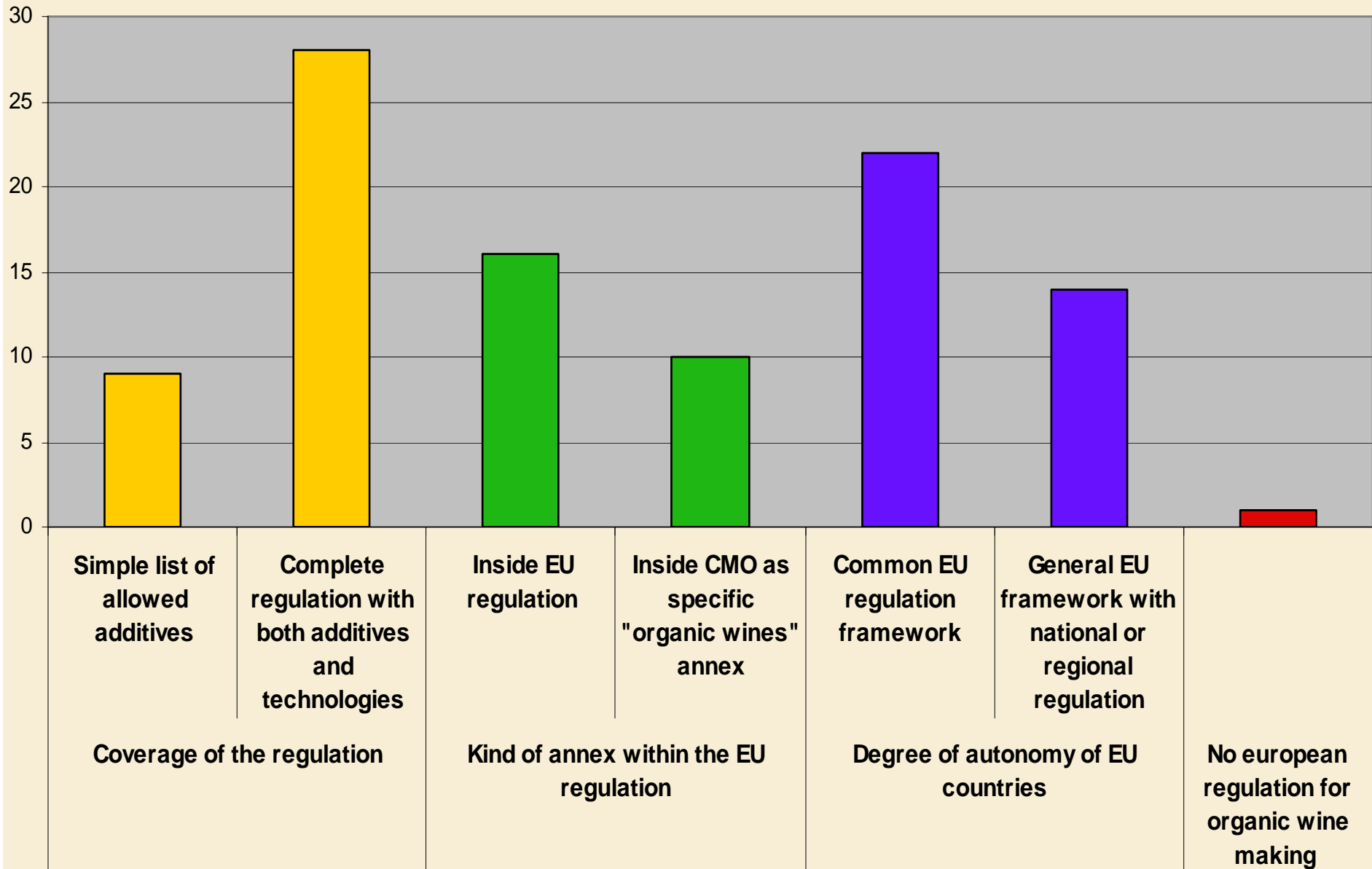




Part 2 :

Organic wine making regulation

Which regulation for organic wines ?



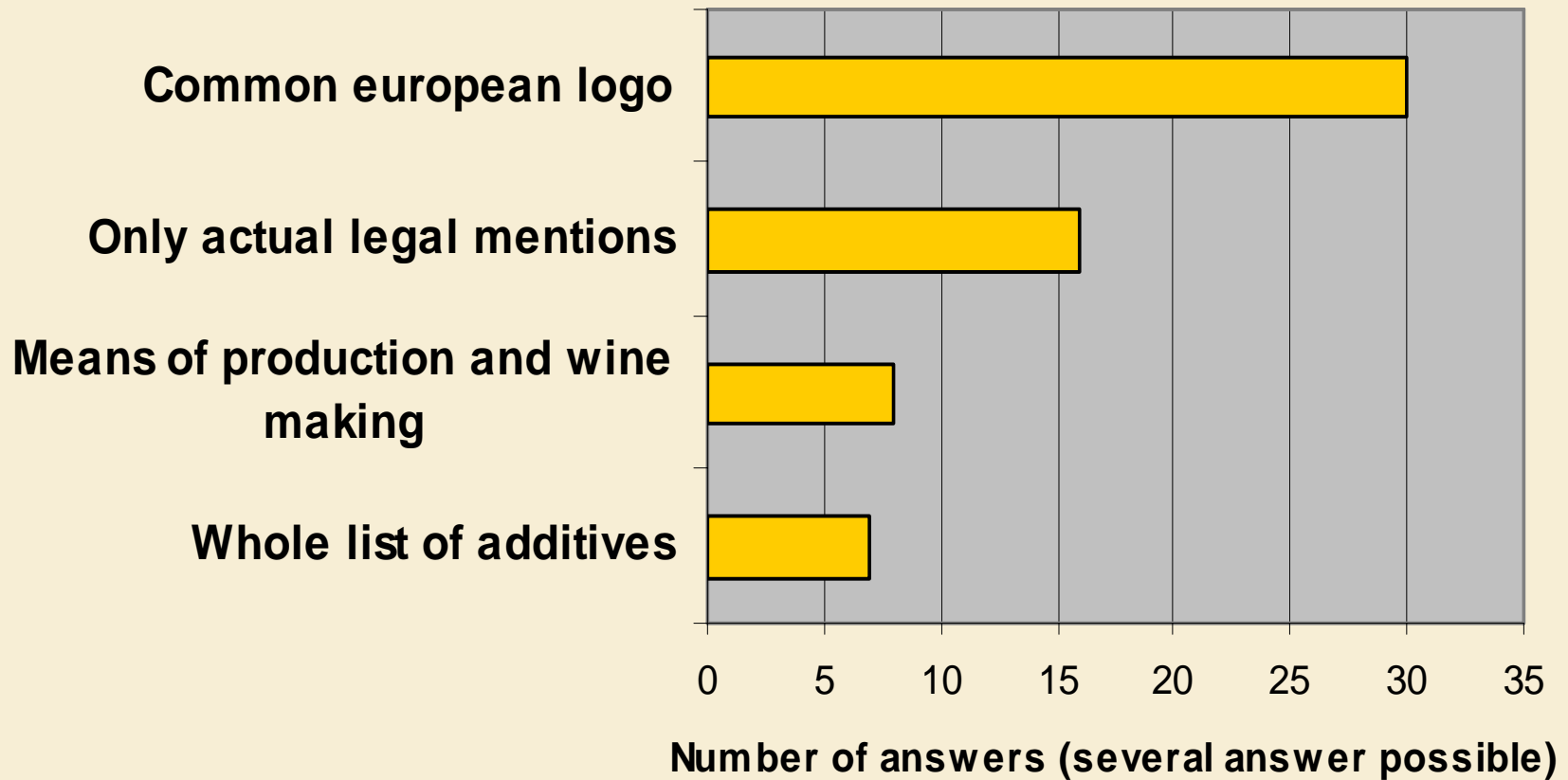


Which definition for an organic wine ?

- ❖ - Wine made with **organic grapes**
- ❖ - **Certification** on wine making
- ❖ - **Safe for environment** and consumer **health**
- ❖ - **Additives** only if necessary



Which information on organic wines labels ?





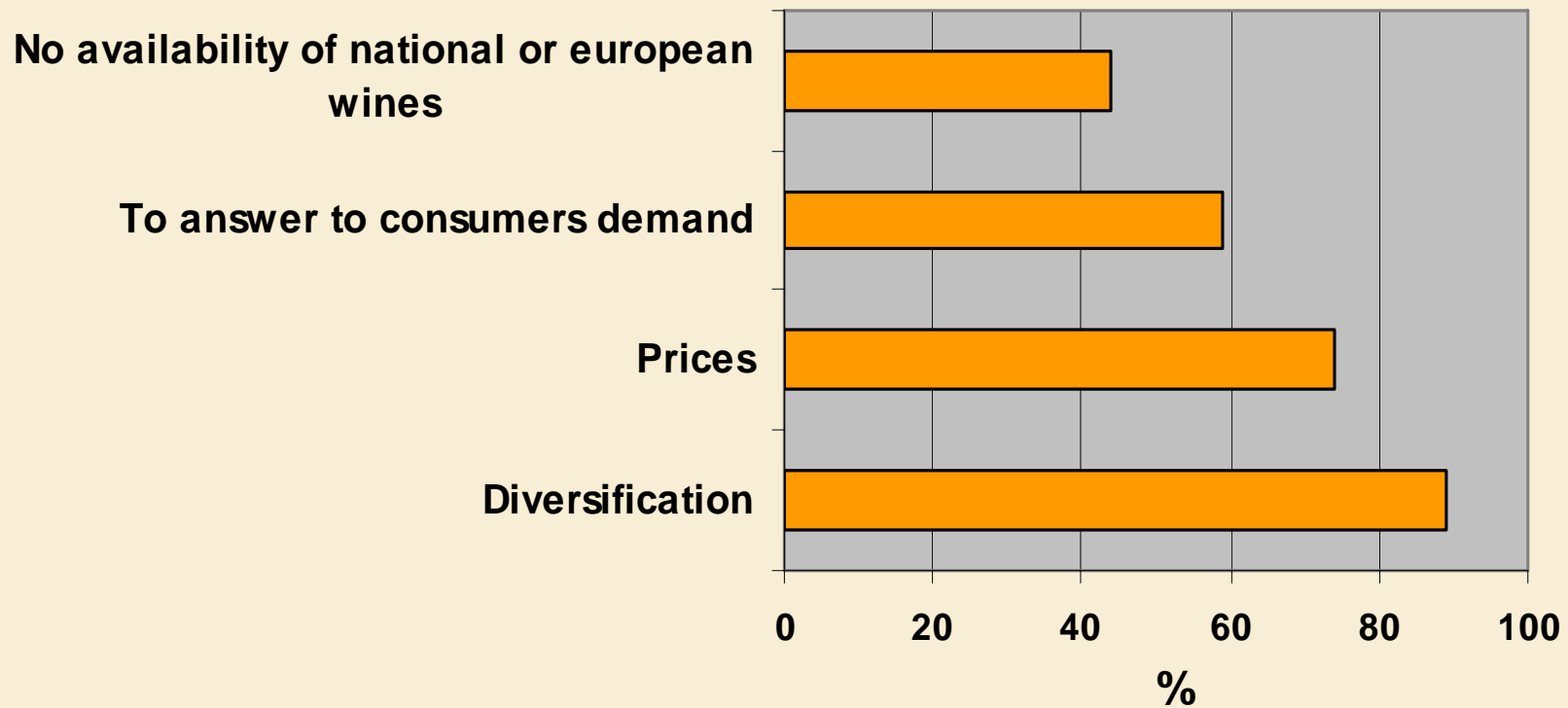
Part 3 :

The Organic Wines

Market



Reasons to import organic wines



50% of the operators surveyed have an import activity



Origins of imported organic wines

🌍 European countries : France, Italy, Spain
quoted by most of the

importers

🌍 Non European countries : mainly Chile,
Argentina, South Africa

22 importers out of 27 buy organic wines from non
European countries

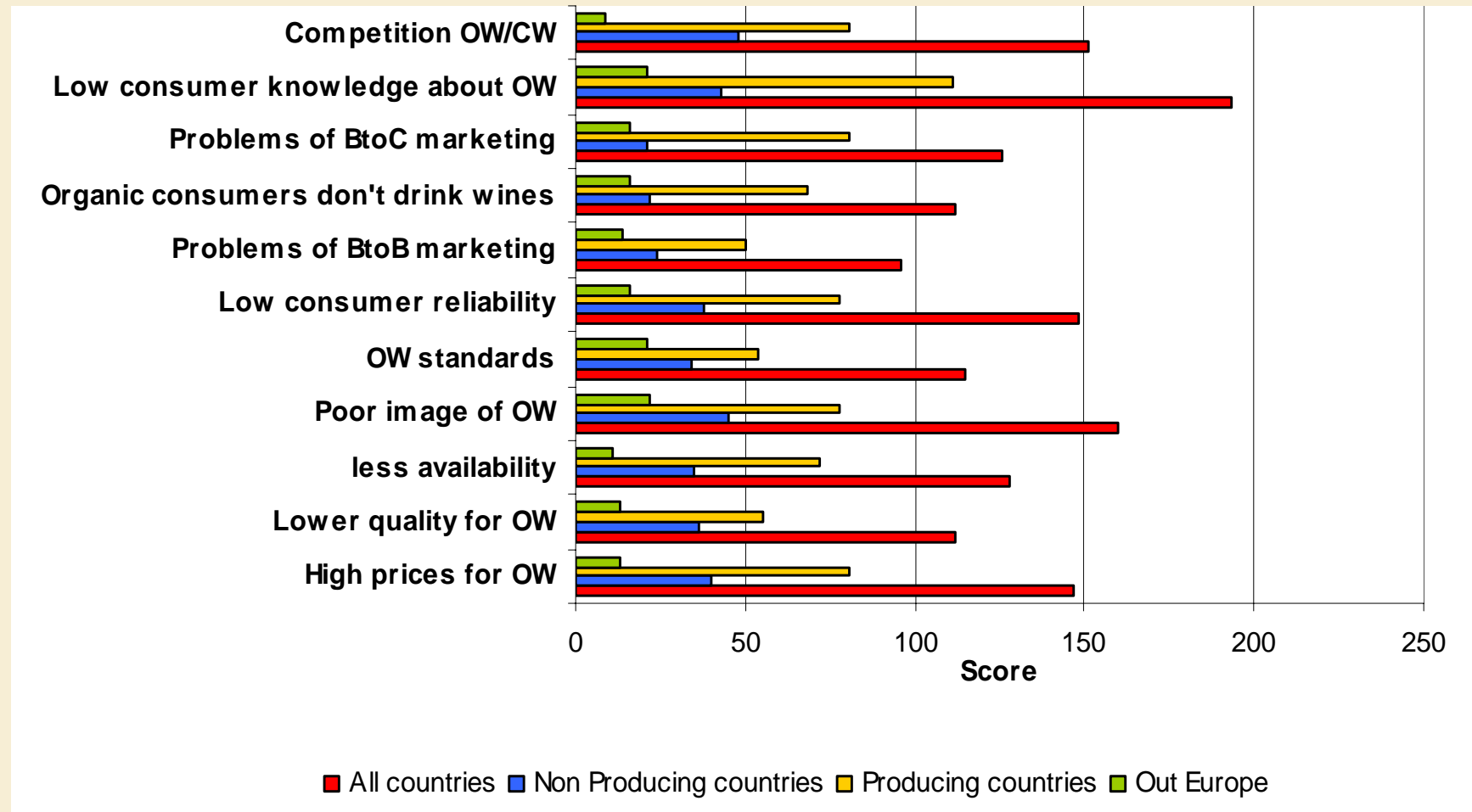


Major obstacles to organic wine market development

- ❁ Low **consumer knowledge** about organic wines and organic wine production.
- ❁ **Poor image** of organic wines.
- ❁ Strong **competition** between conventional wines and organic wines.



Major obstacles to organic wine market development



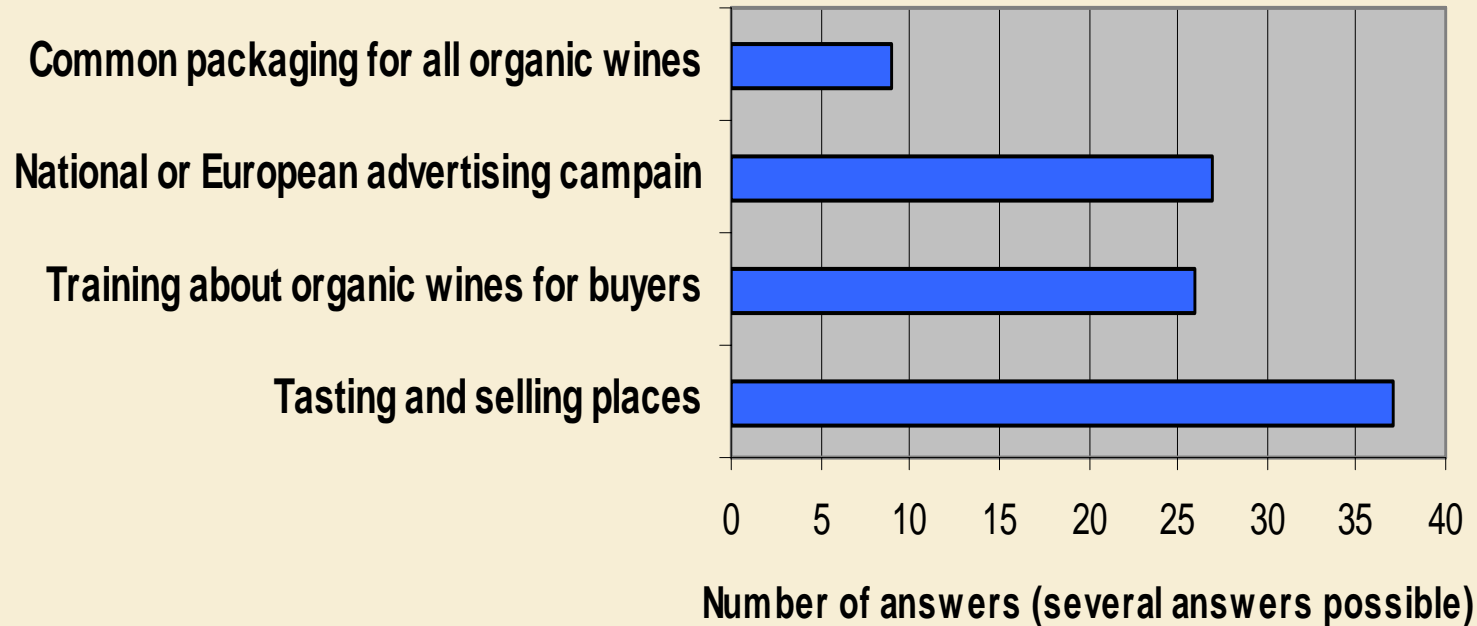


Retailers' proposed solutions

- ♣ Improve **COMMUNICATION** and **MARKETING** (to promote Organic Wines specificities)
- ♣ Improve **quality / price ratio** of organic wines
- ♣ Reduce **sales margin**



How to improve consumers and traders knowledge ?





Conclusion / Summary

- 👁️ General increasing trend of organic wines market and consumption development
- 👁️ Need of global communication on organic wines production
- 👁️ Need of European organic wine making certification
- 👁️ Need to improve quality/prices ratio of European organic wines
- 👁️ Need of more quantitative information on European organic wine market.