

# The Swedish Wine market

Jan Dworsky  
Wines of Germany

# Swedish market



- Population Dec 2021: 10.45m\*
- GDP per capita 2021: *SEK 516,600 (EUR 50,000)\*\**
- Total wine sales through Systembolaget declined by 1% in volume and grew by 2% in value in 2021.
- German wine sales through Systembolaget grew by 2% in volume and 6% in value for 2021 leaving the volume market share at 3.8% (3.7% 2020) and value share at 3.3% (3.2% 2020).

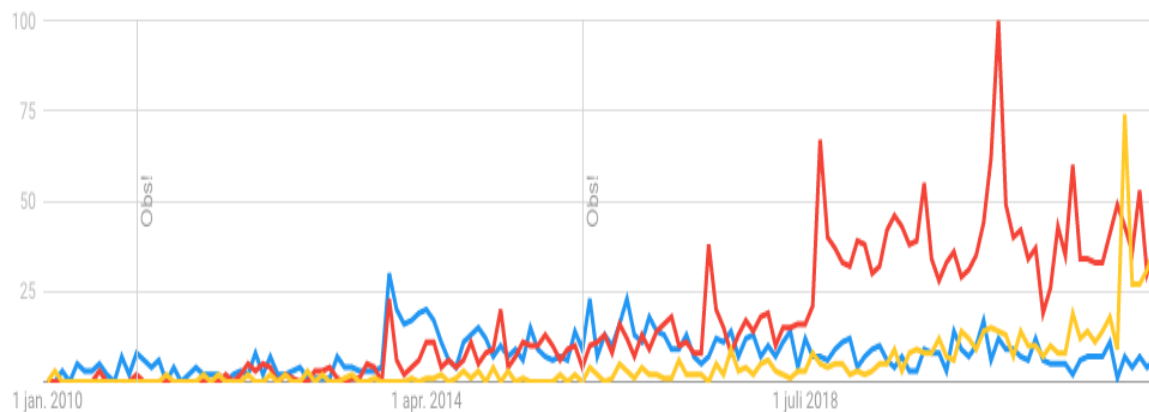
Source:

\* <https://www.scb.se/hitta-statistik/sverige-i-siffror/manniskorna-i-sverige/sveriges-befolkning>

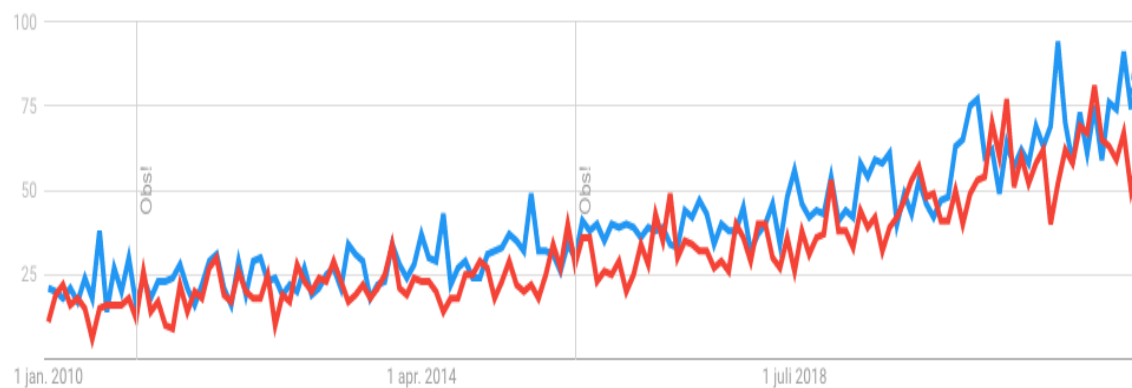
\*\* <https://www.ekonomifakta.se/fakta/ekonomi/tillvaxt/bnp-per-capita>



# Swedish trends by Google searches



Red = Nature wine  
Yellow = Orange wine  
Blue = Organic wine



Blue = Riesling  
Red = Pinot Noir

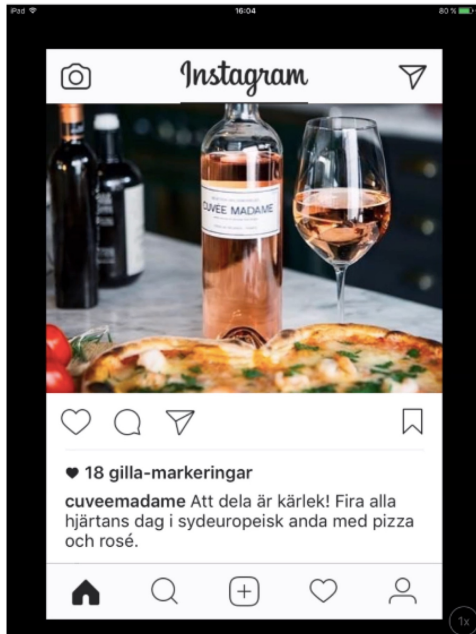
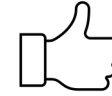
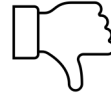
# The swedish alcoholmarket



- ✓ Alcoholic beverages below 3.5% can be purchased in grocery stores.
- ✓ Anything above 3.5% has to be purchased at Systembolaget, through travel, direct imports or consumed at restaurants.
- ✓ Alcohol taxes – the tax for wine in the 8.5-15% bracket is EUR 2.6/liter and on top of that there is VAT of 25%.



# Marketing is strictly regulated



Reviews is ok  
in advertising  
but 20-30  
good reviews  
every week



# Celebrity wines popular



Build brand through popular celebrities – the segment as large as all German wine sales in 2021

Two recent celebrity launches with German riesling



# How to reach the consumer



- ✓ By far the most important channel is Systembolaget (85%) – it has to go through a Swedish importer.
- ✓ Not to forget the restaurant segment that can be a way into the market – in some cases the restaurants also have an import license.
- ✓ Direct imports by consumers is allowed but a small part of the market.



# Systembolaget assortment



- ✓ 14,000 wines of which 1,767 in the fixed range, 1,191 in the temporary range and 10,472 in the available for order range. However, about 96% of sales volumes in the fixed range with 13% of products
- ✓ Germany has 598 products listed of which 66 in the fixed range representing 88% of sales volumes (55 white, 3 red, 4 rosé and 3 sparkling)

# How to get into the fixed range



- ✓ Tenders – if a win, the position is for at least 9 months but if does not sell well enough in its defined price segment it's replaced.
- ✓ If it sells well enough in the available for order range it can qualify for the fixed assortment.  
Example is Phillip Kuhn, one of three red wine fixed range listings, that entered that way in 2021.

# Example German tenders for fixed range

Sep 1 2021	June 1 2022	Sep 1 2022	Dec 1 2022	June 1 2023
Weingut Klumpp - Sekt	Rosé Weingut Mehrlein - 47,000 liters, €2.8-3.3	Organic Pinot Noir in BIB or pouch – 35,000 liters, €4.5-6.0 for 1500ml	Erste lage or grosse lage White – 8,000 liters	Organic White wine in Can – 8000 liters (tender start Sep 29, 2022)
	Organic Rheinhessen Riesling in tetrapack – 32,000 liters, €2-2,8		Sparkling wine in can 200 or 375 ml – 12,000 liters €1.3 for 200ml	Silvaner – 72,000 liters (ex. cellar €2.2-3.2) organic (tender start Sep 29, 2022)



# Position of German wines



- ✓ Germany is the 9th largest market with a volume share of 3.8% in 2021
- ✓ A strong position within white wines where Germany ranks as number 4 with a share of 10.4% in 2021.
- ✓ Large opportunity to grow share within Red, Rosé and sparkling wines.
- ✓ The trend is positive and sommeliers are turning increasingly more positive towards German wines.

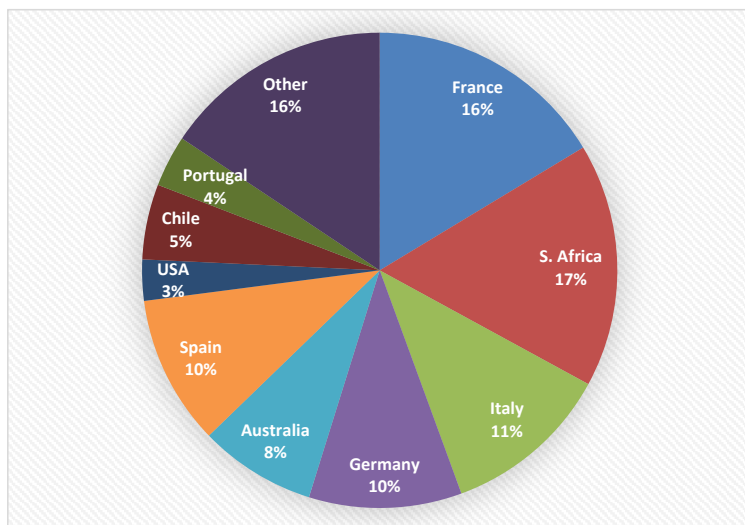
# White wine sales (volume)



- German White wine sales grew by 1% in volume in 2021 a touch ahead of a flat market.
- German White wines defends a strong nbr 4 position with a share at 10.4% partly closing the gap to Italy.

Volume (000 liters)	2015	2016	2017	2018	2019	2020	2021
France	8 184	8 824	9 471	9 329	9 749	11 052	11 698
S. Africa	12 544	12 135	10 879	11 296	10 953	12 317	11 864
Italy	7 297	7 516	8 476	8 378	8 012	8 519	8 200
<b>Germany</b>	<b>6 818</b>	<b>6 587</b>	<b>6 564</b>	<b>6 682</b>	<b>6 779</b>	<b>7 365</b>	<b>7 437</b>
Australia	6 711	6 837	6 569	6 529	5 951	5 980	5 685
Spain	4 371	4 648	4 714	5 033	5 517	6 515	7 282
USA	1 884	1 786	1 680	1 731	1 670	2 080	1 997
Chile	3 798	4 014	4 334	4 610	4 352	4 254	3 663
Portugal	556	493	444	1 169	1 763	2 394	2 509
Other	9 345	9 539	9 230	9 646	10 289	11 117	11 181
Total	61 508	62 378	62 360	64 402	65 033	71 593	71 515
Yoy growth %							
France		8	7	-1	4	13	6
S. Africa		-3	-10	4	-3	12	-4
Italy		3	13	-1	-4	6	-4
<b>Germany</b>		<b>-3</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>9</b>	<b>1</b>
Australia		2	-4	-1	-9	0	-5
Spain		6	1	7	10	18	12
USA		-5	-6	3	-4	25	-4
Chile		6	8	6	-6	-2	-14
Portugal		-11	-10	163	51	36	5
Other		2	-3	5	7	8	1
Total		1	0	3	1	10	0

## Market share 2021



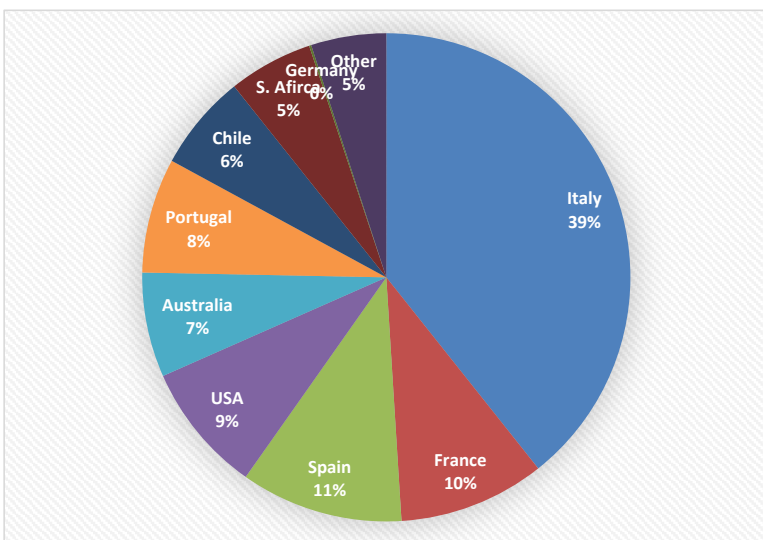
Source: Systembolaget sales statistics

# Red wine sales (volume)



- German Red wine grew by 24% in 2021 strongly outgrowing the market.
- The German market share at 0.1% has increased from extremely low levels. The value share is higher as there is no presence in the low end market.

## Market share 2021



Volume (000 liters)	2015	2016	2017	2018	2019	2020	2021
Italy	40 973	39 977	40 184	38 680	38 405	40 495	39 963
France	7 458	8 375	8 681	8 663	9 327	10 020	9 860
Spain	10 780	10 732	11 555	11 475	11 152	11 374	10 942
USA	6 802	7 245	7 502	7 487	7 841	8 937	8 756
Australia	8 453	8 824	8 068	7 559	8 439	8 107	7 049
Portugal	4 912	5 144	5 174	5 507	5 660	7 958	7 731
Chile	8 083	8 002	7 554	7 154	7 038	7 397	6 479
S. Africa	10 118	8 967	7 797	7 300	6 156	5 891	5 679
<b>Germany</b>	<b>10</b>	<b>44</b>	<b>69</b>	<b>61</b>	<b>96</b>	<b>116</b>	<b>144</b>
Other	5 414	4 345	3 966	3 996	4 433	5 015	5 062
Total	103 002	101 654	100 551	97 884	98 545	105 310	101 665
YoY growth %							
Italy		-2	1	-4	-1	5	-1
France		12	4	0	8	7	-2
Spain		0	8	-1	-3	2	-4
USA		7	4	0	5	14	-2
Australia		4	-9	-6	12	-4	-13
Portugal		5	1	6	3	41	-3
Chile		-1	-6	-5	-2	5	-12
S. Africa		-11	-13	-6	-16	-4	-4
<b>Germany</b>		<b>357</b>	<b>59</b>	<b>-12</b>	<b>57</b>	<b>20</b>	<b>24</b>
Other		-20	-9	1	11	13	1
Total		-1	-1	-3	1	7	-3

Source: Systembolaget sales statistics

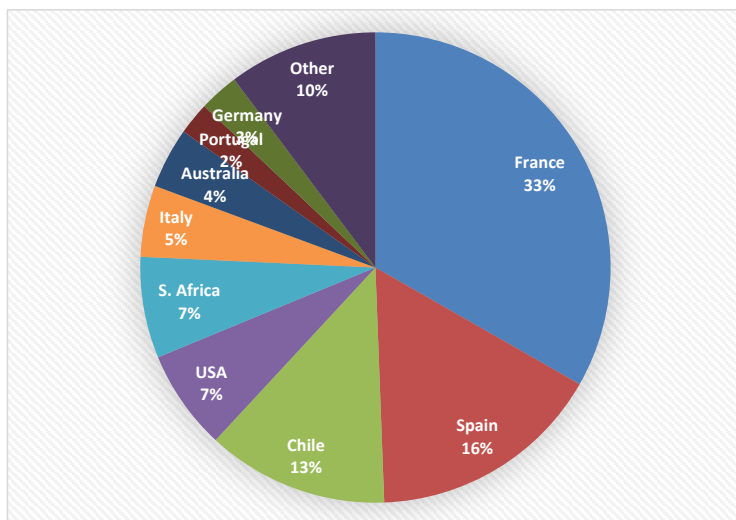


# Rosé wine sales (volume)



- German Rosé wine sales in volume grew by 4% in 2021 outgrowing the market.
- The German market share at 2.8% has increased from 0% in 2015.

## Market share 2021



Volume (000 liters)	2015	2016	2017	2018	2019	2020	2021
France	3 564	3 882	4 124	4 752	4 727	6 216	6 425
Spain	938	1 284	1 613	2 076	1 810	2 750	3 118
Chile	2 277	2 204	2 136	2 213	2 081	2 732	2 413
USA	2 620	2 718	2 437	2 331	1 701	1 789	1 328
S. Africa	2 172	1 910	1 452	1 774	1 559	1 584	1 345
Italy	590	586	800	1 039	776	800	949
Australia	1 316	954	731	1 265	793	640	806
Portugal	329	332	309	312	388	457	428
<b>Germany</b>	<b>8</b>	<b>3</b>	<b>6</b>	<b>15</b>	<b>234</b>	<b>507</b>	<b>525</b>
Other	954	1 190	894	930	1 581	1 857	1 980
Total	14 761	15 060	14 497	16 691	15 415	18 825	18 792
YoY growth %							
France		9	6	15	-1	31	3
Spain		37	26	29	-13	52	13
Chile		-3	-3	4	-6	31	-12
USA		4	-10	-4	-27	5	-26
S. Africa		-12	-24	22	-12	2	-15
Italy		-1	37	30	-25	3	19
Australia		-27	-23	73	-37	-19	26
Portugal		1	-7	1	24	18	-6
<b>Germany</b>		<b>-56</b>	<b>63</b>	<b>167</b>	<b>1461</b>	<b>117</b>	<b>4</b>
Other		25	-25	4	70	17	7
Total		2	-4	15	-8	22	0

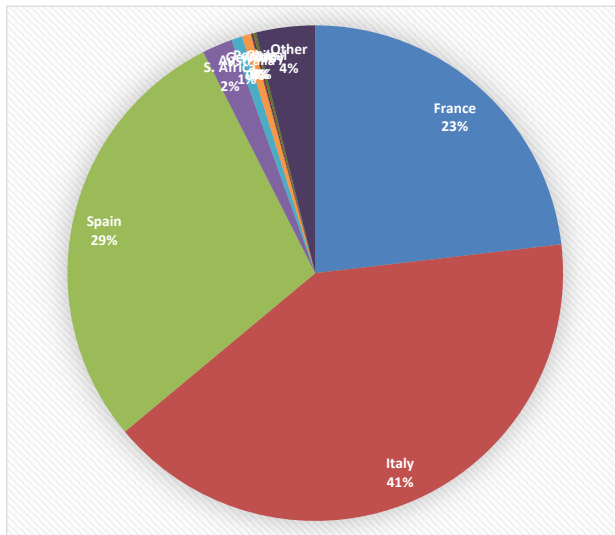
Source: Systembolaget sales statistics

# Sparkling wine sales (volume)



- German Sparkling wine sales in volume declined by 29% in 2020.
- The German market share declined to 0.6% (1.1% 2015)

## Market share 2021



Volume (000 liters)	2015	2016	2017	2018	2019	2020	2021
France	3 389	3 994	4 153	4 372	4 577	4 827	5 686
Italy	4 887	6 038	7 260	8 350	8 744	9 515	10 024
Spain	2 220	2 719	3 502	4 273	5 064	5 951	7 022
S. Africa	159	156	151	361	405	441	489
Australia	179	145	62	247	320	396	174
<b>Germany</b>	<b>136</b>	<b>137</b>	<b>381</b>	<b>386</b>	<b>350</b>	<b>201</b>	<b>142</b>
USA	11	9	5	39	35	14	10
Portugal	1	5	2	1	4	14	29
Chile	194	180	146	80	15	7	45
Other	1 369	1 221	1 092	1 017	919	836	946
Total	12 546	14 604	16 755	19 128	20 432	22 202	24 566
YoY growth %							
France		18	4	5	5	5	18
Italy		24	20	15	5	9	5
Spain		22	29	22	19	18	18
S. Africa		-2	-4	140	12	9	11
Australia		-19	-57	296	29	24	-56
<b>Germany</b>		<b>1</b>	<b>179</b>	<b>1</b>	<b>-9</b>	<b>-43</b>	<b>-29</b>
USA		-20	-45	719	-11	-59	-33
Portugal		317	-57	-44	233	256	101
Chile		-7	-19	-45	-82	-55	586
Other		-11	-11	-7	-10	-9	13
Total		16	15	14	7	9	11
Source: Systembolaget sales statistics							

# German sales by price point



Strong growth in the premium segment (>250 kr/liter) at 40% in 2021 with the share in this segment increasing to 1.4% (1.0% 2019).

A strong trend towards more high value product but the strongest market share is still in the ultra low segment.

Price point	Value (SEKm)		Volume (litre)		Market share value		Market share volume	
	2021	chg %	2021	chg %	2021	2020	2021	2020
< 60 kr	150	-3%	2 655 552	-3%	15,06%	19,99%	15,27%	20,18%
60-80 kr	85	-7%	1 297 863	-7%	1,63%	1,60%	1,75%	1,70%
81-100 kr	169	2%	1 833 094	1%	4,40%	4,34%	4,30%	4,24%
101-149 kr	238	6%	1 946 644	6%	3,33%	3,08%	3,31%	3,07%
150-250 kr	103	35%	573 841	33%	2,53%	2,13%	2,55%	2,16%
>250 kr	38	40%	112 069	39%	1,37%	1,20%	1,58%	1,39%
Total	783	6%	8 419 063	2%	3,25%	3,20%	3,78%	3,70%
Source: Systembolaget sales statistics								



# Red wine is a big opportunity



- ✓ Pinot Noir a growing segment - its share of red wine sales up from 2.8% to 4.1%.
- ✓ Only 3 German wines in the fixed range today with a market share of 3% in 2021 (France 32%, US 31%, New Zealand 13%, Chile 8% and Austria at 6%)
- ✓ Grand Hotel the leading 5-star hotel in Sweden – 155 page wine list with 8 pages German white wines, 21 pages of red Bourgogne and not a single German red wine.
- ✓ But a very positive trend with German red wine sales at Systembolaget up by 74% in Q1 2022.
- ✓ For the first time German red wines got medals in Vinordic Wine challenge 2022 – 5 medals.

# To find the "right" importer is key



- ✓ Systembolaget has to buy products through a Swedish importer/beverage supplier.
- ✓ The market has consolidated with two large groups VIVA and Anora controlling one third of the market. The top 50 importers controlling 92% of the market.
- ✓ It's a joint effort to build a brand – producer needs to be involved in marketing.

# 50 importers in Sweden – 92% ms



Rank	Company	Group	SEKm	ms %
1	Giertz Vinimport AB	VIVA	2 175	9,0%
2	The Wine Team Global AB	VIVA	1 655	6,9%
3	Oenoforos AB	Oenofors	1 409	5,9%
4	Vingruppen Norden	Anora	1 320	5,5%
5	Spring Wine	Spendrups	677	2,8%
6	Arvid Nordqvist		675	2,8%
7	Enjoy Wine & Spirits AB	DiLucca	644	2,7%
8	Nigab		629	2,6%
9	The WineAgency Sweden	Anora	628	2,6%
10	Hermansson & Co		609	2,5%
11	Wine Affair Scandinavia		590	2,5%
12	Pernod Ricard Sweden AB		565	2,3%
13	Chris-Wine	VIVA	541	2,2%
14	Treasury Wine Estates		529	2,2%
15	VCT Sweden AB		518	2,2%
16	Iconic Wines	VIVA	511	2,1%
17	Ward Wines		497	2,1%
18	Fields Wine Co		465	1,9%
19	Tuesday Wine		454	1,9%
20	Domaine Wines Sweden	Martin & Servera	453	1,9%
21	Winepartners Nordic	The Beverage Group	423	1,8%
22	WineWorld AB	Anora	386	1,6%
23	Lively Wines		373	1,6%
24	Vinunic AB	Anora	370	1,5%
25	Henkell Freixenet		355	1,5%
26	Prime Wine Sweden	Solera Sweden	335	1,4%
27	Winemarket Nordic	VIVA	326	1,4%

Rank	Company	Group	SEKm	ms %
28	Stellan Kramer		317	1,3%
29	Wine Detectives		299	1,2%
30	Johan Lidby Vinhandel		289	1,2%
31	The Company of Urban Wines		248	1,0%
32	Nelex Beverage		241	1,0%
33	The Wine and Spirits Collective		234	1,0%
34	Kiviks Musteri		231	1,0%
35	Mondo Wine Sweden	Solera Sweden	225	0,9%
36	Carovin	oenofors	186	0,8%
37	Moet Hennessy		170	0,7%
38	Tryffelsvinet	VIVA	159	0,7%
39	Vinia Sweden	Sigva	157	0,7%
40	Quaffable Wine Sweden	Anora	133	0,6%
41	Sigva	Sigva	132	0,5%
42	Terrific Wines		130	0,5%
43	Arcus WineBrands Sweden AB		127	0,5%
44	We & Wine		116	0,5%
45	Divine		114	0,5%
46	Apricot		112	0,5%
47	Contemporary Wines Sweden		111	0,5%
48	Provinium		110	0,5%
49	Janake Wine group	Beverage group	100	0,4%
50	Sundance Wine		97	0,4%
	Sub total		22 150	92,1%
	Other		1 907	7,9%
	Total		24 057	100,0%

# Wines of Germany – first half



## February

Pop-up redwine  
tasting

## March

Riesling Birthday

Influencer event  
- Natural Wines

## April

German Star  
Wine list of the  
year

Swedish  
sommelier  
championship

Riesling &  
Vänner

## May/June

Masterclass  
education

Riesling weeks

# Pop-up redwine tasting

- 25 producers with 50 wines
- Taking place in our premises
- 28 importers signed up
- We believe at least 4-5 producers now have a representation in Sweden



## Weingut Blankenhorn



### Facts:

**Region:** Baden  
**Location:** 79418 Schliengen  
**Owner:** Martin Maennle  
**Winemaker:** Yvonne Maennle  
**Average:** 34 Ha  
**Main grapes:** Spätburgunder, Gutedel, Chardonnay  
**Web:** [www.weingut-blankenhorn.de](http://www.weingut-blankenhorn.de)  
**Contact:** Paulina Sommerhuber, [info@gutedel.de](mailto:info@gutedel.de)

**Background:** We are Yvonne and Martin Maennle and took over Weingut Blankenhorn in 2014. It is our love of the Markgräflerland region, the village Schliengen and our passion for wine that made us take the helm at the 1847-founded Weingut Blankenhorn. Uniquely positioned in the borderland where Germany, France and Switzerland meet, our vineyards are characterised by the climatic influence of the Belfort Gap. This is also evident in our most important grape varieties: Spätburgunder, Gutedel and Chardonnay, all perfectly suited to conveying the potential of our sites.

**Vinification:** We really want to express the differences of soil and climate in our wines. We achieve this by working in tune with nature and approaching each site individually and sensitively, always striving for the utmost in quality. It's important to us to continue the estate's long tradition. At the same time, everyone will notice the breath of fresh air throughout the estate. In red wine production we work with open mash fermentation and 228l French barriques. In white wine we produce fresh and light wines but also in barriques and big oak barrels fermented white wines. Most of our wines are minimum 6 months on the lees.

### Details of wines for tasting:

**Pinot Noir VDP-ORTSWEIN, 2018.** Pinot Noir. Open maceration in opened covers until 4 weeks. Fermentation 50% in stainless steel tank and 50% in 2 or 3 years old French barriques. 12-14 months in barrel aging. Bottling. Ex. Cellar price ca 66.25.

**Malbec Rouge VDP-GUTSWEIN, 2018.** Malbec/Spätburgunder/Cabernet Sauvignon. Open mash fermentation for 4 weeks. 50% stainless steel and 50% used French barriques. 12-14 months maturation in French barriques. Bottling. Ex. Cellar price ca 64.95.



Rödvinprovning  
22-23 Februari

50 tyska rödviner att prova

Wines of Germany Sverige  
c/o-PRAT PR Tulegatan 11



CHOOSE | SHARE | CARE

Market Data Sweden, June 2022, © Wines of Germany





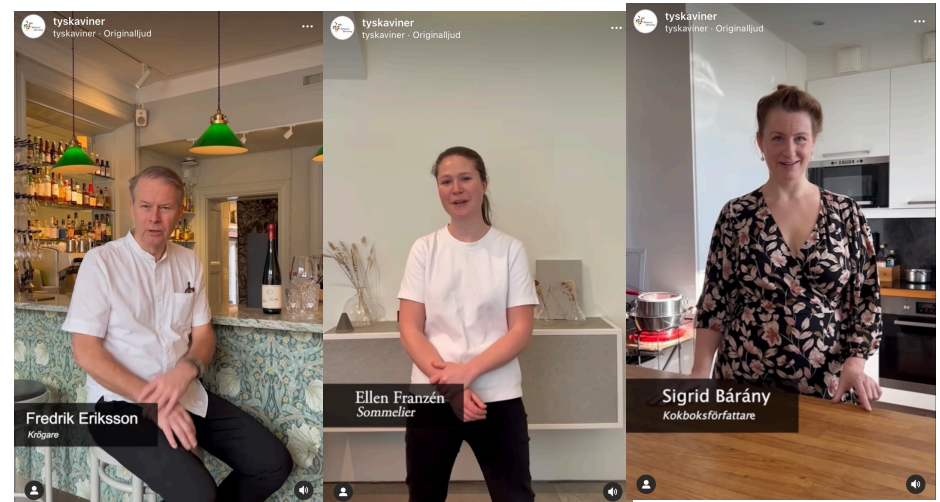
# Riesling birthday



The campaign ran  
between 4 March and 14

3 films produced for  
instagram – interviewing  
well known  
chefs/sommeliers

Gained another 40  
followers on the back of  
the campaign



# Influencer event – Natural wines



To showcase that there are already a lot of german natural wines in the market

Nico Espenschied presenting and leading a tasting of four of his wines

Madeleine Beglund Krantz leading a tasting of another 10 natural wines both white, red and orange wines

24 guests attending generating more than 40 posts on instagram  
→ about 30 new followers





# German Star Wine list of the year



E&G was the winner and as a sponsor of the prize, Wines of Germany, participated on the stage to hand out the prize.

As a part of the award the winner Erik Florén (restaurateur/sommelier) will have the opportunity to go to Germany on a training trip for sommeliers arranged by DWI later this year.

During the event, an exhibition was held in the venue with over 200 guests from the trade industry.



# Swedish sommelier championship

Wines of Germany is a sponsor of the Swedish Sommelier Association for 2022.

The Winner Emma Ziemann got a place in the masterclass education over three days.

Wines of Germany Sweden had a stand at the event where we informed about upcoming events and with importers Handpicked Wines and Löddrig Häst offered tasting of German wines.





# Riesling & Vänner



19 producers at Nationalmuseum

170 guests signed up, and the event was visited by 131 trade representatives (67 in 2019) which is an increase of 95%.

The participants came from:  
41 importers, 24 press and wine influencers, 66 gastronomy, sommeliers





# Masterclass education



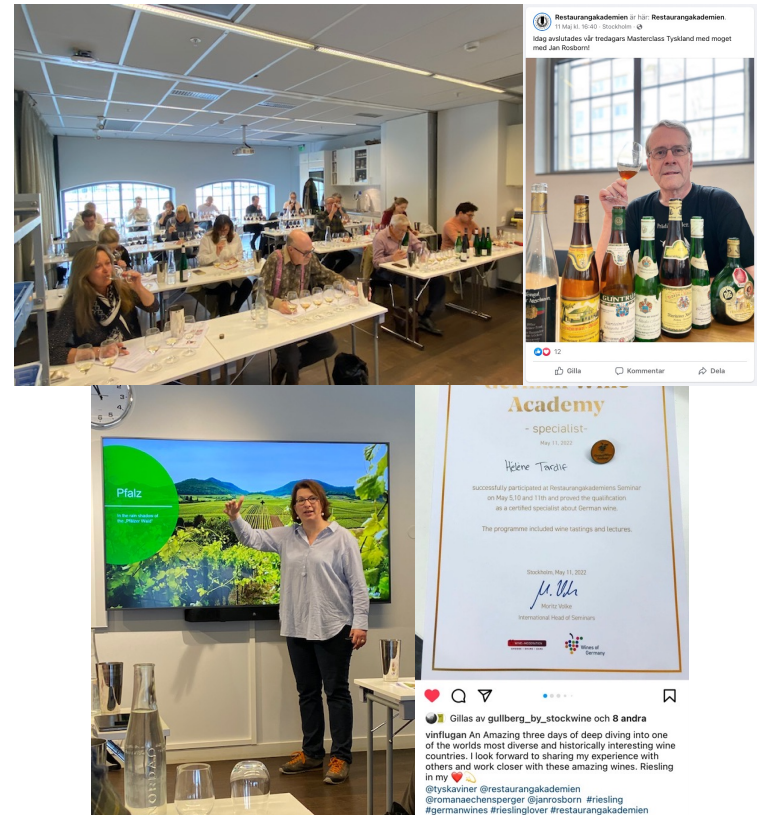
Restaurangakademien one of the leading sommelier educators

Three days of masterclasses in May

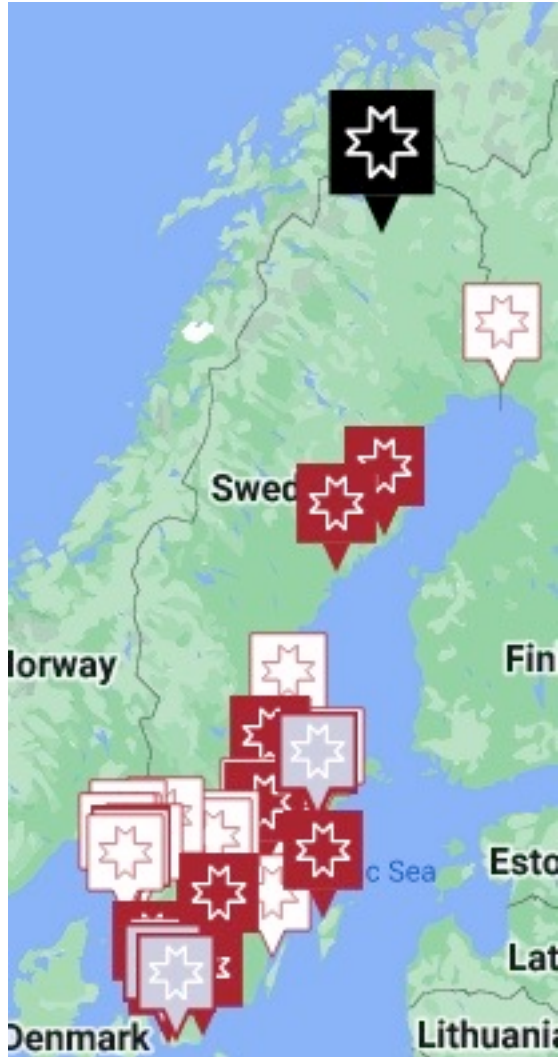
19 sommeliers attending among them 2 importers and 12 working at restaurants

Romana Eschensberger and Jan Rosborn presenting

Very positive feedback – one of the attendants took the initiative to educate sommeliers at eight of their restaurants post the event.



# Riesling weeks – May 30/June 12



67 restaurants  
participating

16 importers as partners

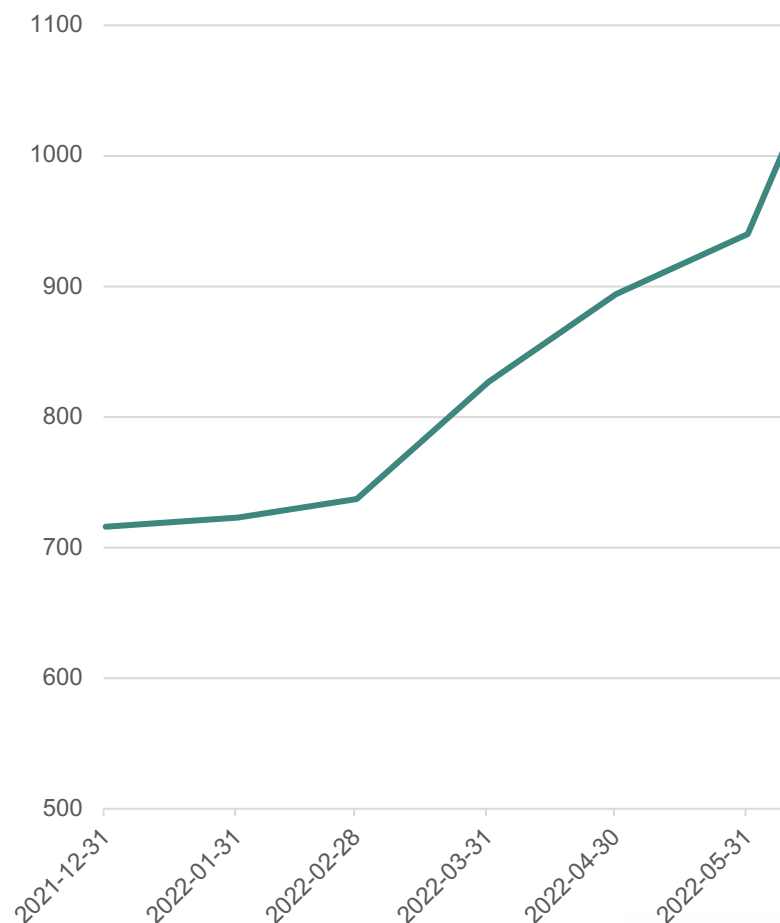
Driving engagement on  
instagram - consumer  
competition with 190  
participating

More than 100 new  
followers on instagram

# Instagram is the key platform

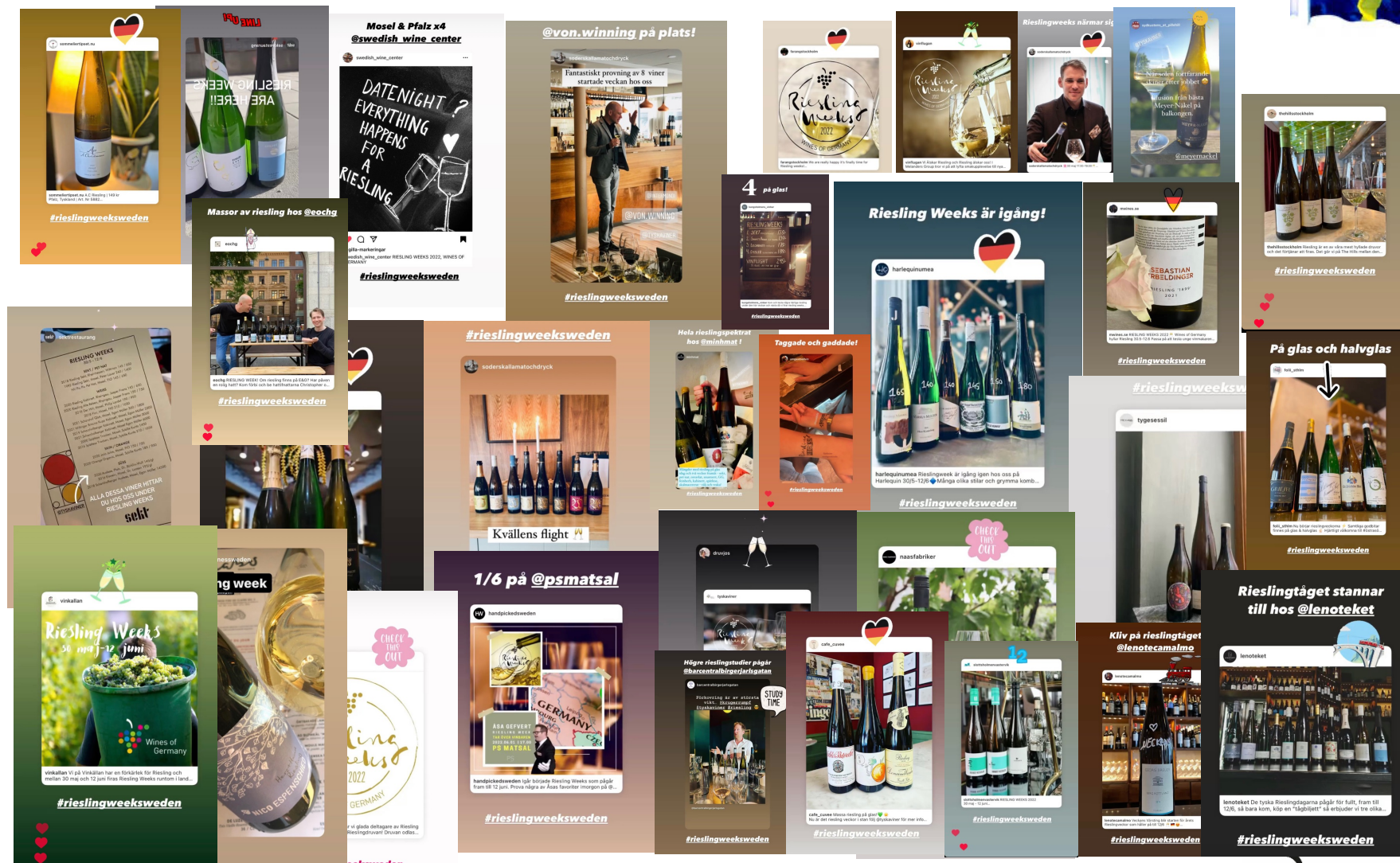


- Increased the followers by close to 50 % year to date.
- More focus on creating engaging content and selective sponsoring





# Riesling weeks – engagement



WINEinMODERATION

CHOOSE | SHARE | CARE

Market Data Sweden, June 2022, © Wines of Germany

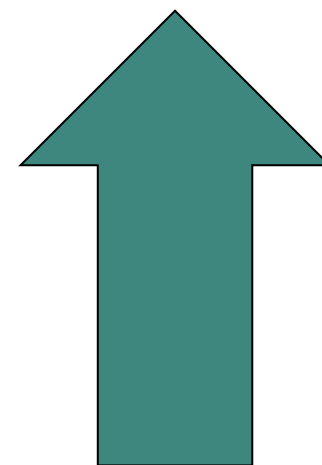


Wines of  
Germany

# Educate & Inspire



- Continued focus on the professional segment
- Network with the “right” people and opinion leaders that influence trends in the market – importers, restaurant sommeliers, journalists, influencers.
- White wines – continued focus on Riesling while building interest for other grapes.
- Red wines – educate sommeliers is key to get more red wines in to wine lists at good restaurants → higher demand at Systembolaget.
- Rosé, Sekt & Orange – showcase the depth and quality of the range
- Highlight sustainable and organic German Wines, a segment that is growing strongly in Sweden.
- Match making – to have more importers introducing more wines and new producers to both Horeca & Systembolaget.





Thank you ....