2nd Oenobio conference

"Organic viticulture facing climate change": New challenges in Organic wine production & marketing

Hochschule Geinsenheim University (HGU) – Germany

CONSUMER PREFENCES: TRENDS & REASONS BUYING ORGANIC SPARKLING WINES

Christophe Marquet

Commercial & Marketing Director Covides Vineyards-Wineries. Member of the Board of Directors.
Professor Economy & Marketing University Rovira i Virgili Tarragona – Faculty of Oenology (Spain).
Professor in International Marketing Master on Wine Tourism Innovation Wintour ERASMUS MUNDUS University Rovira i Virgili Tarragona (Spain).

CONSUMER PREFENCES: TRENDS & REASONS BUYING ORGANIC SPARKLING WINES

1. Global trends in wine during pandemia (march-October 20):
Special focus on organic Wines.

2. CREDA Qualitative market survey on Organic Cavas (October 2019)

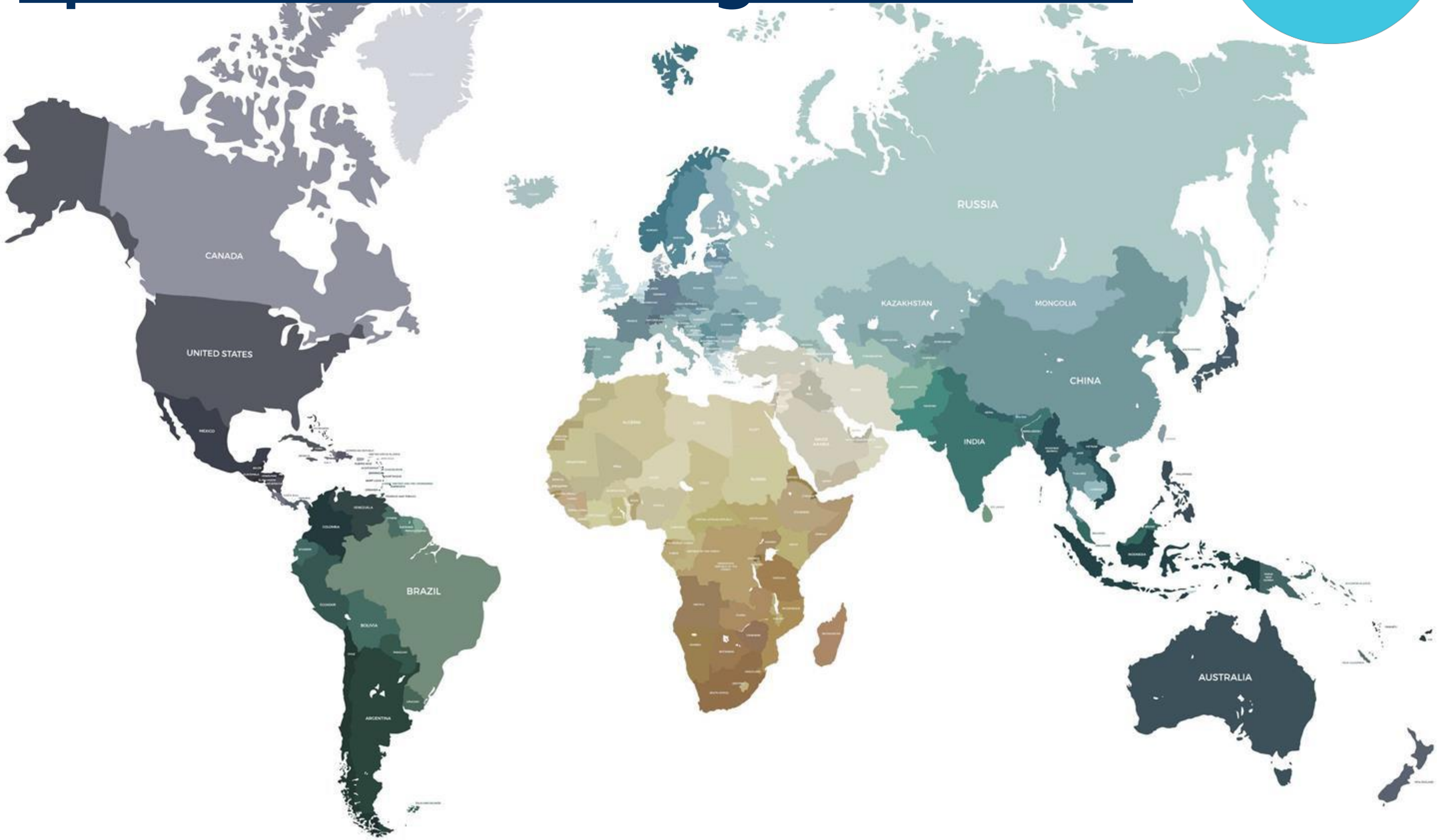
3. AOC / DOQ Cava data on Organic category 2019

4. Examples of marketing strategies:
Special focus on organic Wines.

Christophe Marquet

GLOBAL TRENDS IN WINE 2020
Specific focus on Organic Wines

wine intelligence



Updated March 25th 2020

The opportunity for alternative and particularly sustainable wines is on the rise, **driven by younger consumers and increased awareness**.

We can also expect a heightened focus on collective responsibility, **leading to support for sustainable products**.

Ethical consumerism has gained traction in recent years, with consumers increasingly paying attention to the impact of their behaviours on both the environment and their health. Wine drinkers are starting to look for alternatives, to extend their ethical impact

Organic wine has the highest opportunity score amongst alternative wine styles at a global level.

Younger wine drinkers are the key demographic that present the most opportunity to this category, due to their attitudes and willingness to invest time and money into their health

Rising ethical engagement

Rising ethical engagement

Organic wine achieves the highest opportunity score amongst alternative wine styles at a global level

wine intelligence

Global SOLA wine opportunity index 2019

Rank	Type of wine	AUS	BEL	CAN	FIN	DEU	HKG	JPN	NLD	NZL	PRT	SGP	ESP	SWE	GBR	USA	[GLOBAL] Weighted opportunity index
1st	Organic wine	42	46	43	70	49	45	50	46	41	36	42	35	64	39	51	48.0
2nd	Sustainably produced wine	38	38	40	53	47	34	42	39	39	46	44.7	45.8	44	36	47	44.2
3rd	Fairtrade wine	33	41	35	57	45	40	29	38	30	30	36.5	40.9	44	46	44	41.3
4th	Environmentally friendly wine	36	30	37	54	35	35	35	25	40	36	42	54	39	32	47	40.9
5th	Preservative free wine	40	23	35	43	28	34	54	26	34	35	38	38	32	31	42	39.0
6th	Sulphite free wine	34	31	35	39	24	28	45	20	32	37	29	41	27	30	42	36.9
7th	Carbon neutral winery	29	24	30	32	24	28	26	23	29	33	30	36	29	31	39	32.7
8th	Lower alcohol wine	38	22	29	32	30	34	28	26	45	33	43	32	25	34	32	31.6
9th	Orange / skin contact wine	25	18	26	31	25	31	31	17	26	25	25	23	17	24	41	30.6
10th	Biodynamic wine	29	29	26	37	20	34	27	22	26	22	24	24	22	26	34	28.5
11th	Non-alcoholic wine	29	24	25	31	28	31	19	25	27	17	30	26	34	29	26	26.6
12th	Vegan wine	24	10	21	34	22	30	18	17	25	15	18	26	19	24	32	25.5
13th	Vegetarian wine	23	8	21	n/a	n/a	26	n/a	16	n/a	13	26	22	19	22	34	20.3

= ranks among the top 3 in the market

I think the greatest opportunity in wine emphatically will be through the lens of organic, biodynamic and sustainable products. Consumers are increasingly aligning their consumption of other products i.e. fruit, vegetables, etc, with their other decision-making processes. I think the next logical step for wine and other beverages, particularly alcohols, will be to fit into this sort of decision making

Wine Retailer, Australia

Wine Intelligence trade interview programme 2019
Source: Wine Intelligence, Vinitrac® October 2018, January / March 2019 (n=16,704) regular wine drinkers

vinitrac®

Rising ethical engagement

With the exception of South Korea and Sweden, approximately a third of consumers believe that organic wine is both better for the environment and one's health

wine intelligence

Organic wine understanding

% who find the following statements about organic wine true compared to 'regular' wine

Base = n>=700 wine drinkers in all countries

	Australia	Brazil	Canada	Hong Kong	Portugal	Ireland	Mexico	Singapore	South Korea	Sweden	US
n=	*1000*	*1000*	*1000*	*770*	*700*	*1000*	*700*	*769*	*1592*	*1003*	*2004*
More expensive	32%	33%	37%	34%	38%	44%	29%	39%	51%	31%	36%
More environmentally-friendly	29%	38%	30%	36%	41%	37%	53%	28%	59%	52%	31%
Better for my health	22%	32%	19%	37%	38%	28%	35%	32%	48%	21%	27%
It is less processed	26%	26%	19%	28%	31%	28%	34%	23%	18%	14%	24%
More ethically responsible	22%	25%	23%	25%	33%	34%	30%	20%	31%	32%	24%
Higher in quality	14%	26%	13%	31%	15%	17%	26%	26%	33%	14%	21%
Tastes better	10%	21%	10%	20%	15%	13%	18%	16%	17%	10%	15%
Better with food	9%	15%	8%	15%	8%	9%	18%	13%	16%	4%	12%
More prestigious	10%	16%	7%	13%	8%	9%	14%	12%	13%	10%	11%
Lower in calories	10%	14%	7%	13%	9%	8%	13%	12%	7%	3%	10%
Tastes worse	8%	8%	5%	10%	7%	7%	4%	8%	5%	4%	8%
Lower in alcohol	8%	16%	4%	12%	8%	7%	13%	12%	7%	3%	8%

> Consumers do not know the difference. They think that this (organic) means that there are no treatments in the vineyard
> ***Wine Producer, Portugal***

> The challenge with organic wine is that a lot of consumers assume wine is organic, how could it not be, it comes from the ground and comes from grapes. They don't think about pesticides and how they are used on grapes just like many other agricultural products
> ***Wine Brand Owner, US***

Wine Intelligence trade interview programme 2019

Source: Wine Intelligence, Vinitrac®Global, October 2019, n>700 regular wine drinkers

vinitrac

Rising ethical engagement

Millennial wine consumers are more likely to purchase a wide variety of alternative wines compared with other regular wine drinkers

wine intelligence

Alternative wine purchase: By age

% who have sought to purchase the following types of wine in the past 6 months
Base = n>=1,000 regular wine drinkers in Australia, the UK and the US

	US			UK			Australia		
	21-34	35-54	55+	18-34	35-54	55+	18-34	35-54	55+
Sample size n=	*594*	*631*	*775*	*248*	*328*	*424*	*319*	*316*	*365*
Organic wine	21%	17%	6%	8%	6%	4%	16%	10%	4%
Sustainably produced wine	11%	8%	5%	7%	2%	2%	8%	5%	4%
Environmentally friendly wine	11%	8%	4%	8%	2%	1%	10%	4%	2%
Lower alcohol wine	12%	9%	2%	11%	7%	6%	14%	8%	8%
Preservative free wine	10%	8%	3%	4%	1%	1%	7%	8%	3%
Non-alcoholic wine	11%	7%	1%	8%	3%	5%	11%	5%	4%
Sulfite free wine	8%	6%	3%	2%	4%	3%	6%	5%	2%
Fairtrade wine	7%	8%	2%	17%	6%	7%	7%	2%	1%
Wine from a carbon-neutral winery	9%	5%	2%	3%	0%	0%	4%	1%	0%
Orange / skin contact wine	7%	6%	1%	4%	1%	0%	3%	1%	0%
Vegan wine	7%	5%	1%	5%	3%	2%	6%	3%	0%
Vegetarian wine	5%	5%	1%	3%	2%	1%	6%	0%	0%
Biodynamic wine	5%	4%	1%	0%	1%	1%	4%	2%	0%

%/%: statistically significantly higher / lower than regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Global, 2019, n>=1,000 regular wine drinkers

Rising ethical engagement

Younger wine drinkers are the key demographic that present the most opportunity due to their attitudes and willingness to invest time, education and money into their health

Ethical attitudes amongst US regular wine drinkers

% who agree or strongly agree with the following attitudinal statements
Base = All US regular wine drinkers (n = 3,000)

"I try to buy food that is grown or produced locally (in the region where I live)"

		Age groups		
	All US regular wine drinkers	21-34	35-54	55 and over
	3,000	*849*	*1038*	*1113*
"I try to buy food that is grown or produced locally (in the region where I live)"	25%	27%	28%	20%

"I actively eat more / exclusively vegetarian or vegan food"

		Age groups		
	All US regular wine drinkers	21-34	35-54	55 and over
	3,000	*849*	*1038*	*1113*
"I actively eat more / exclusively vegetarian or vegan food"	14%	21%	14%	7%

"I am willing to pay more for a product that is environmentally safe"

		Age groups		
	All US regular wine drinkers	21-34	35-54	55 and over
	3,000	*849*	*1038*	*1113*
"I am willing to pay more for a product that is environmentally safe"	22%	29%	26%	12%

"I am willing to give up convenience in return for a product that is environmentally safe"

		Age groups		
	All US regular wine drinkers	21-34	35-54	55 and over
	3,000	*849*	*1038*	*1113*
"I am willing to give up convenience in return for a product that is environmentally safe"	19%	25%	23%	10%

Source: Wine Intelligence, Vinitrac® US, 2019, n=3,000 regular wine drinkers

CONSUMER PREFENCES: TRENDS & REASONS BUYING ORGANIC SPARKLING WINES

1. Global trends in wine during pandemia (march-October 20):
Special focus on organic Wines.

2. CREDA Qualitative market survey on Organic Cavas (October 2019)

3. AOC / DOQ Cava data on Organic category 2019

4. Examples of marketing strategies:
Special focus on organic Wines.

Christophe Marquet

CREDA
Qualitative Consumer Survey

Barcelona, october 2019

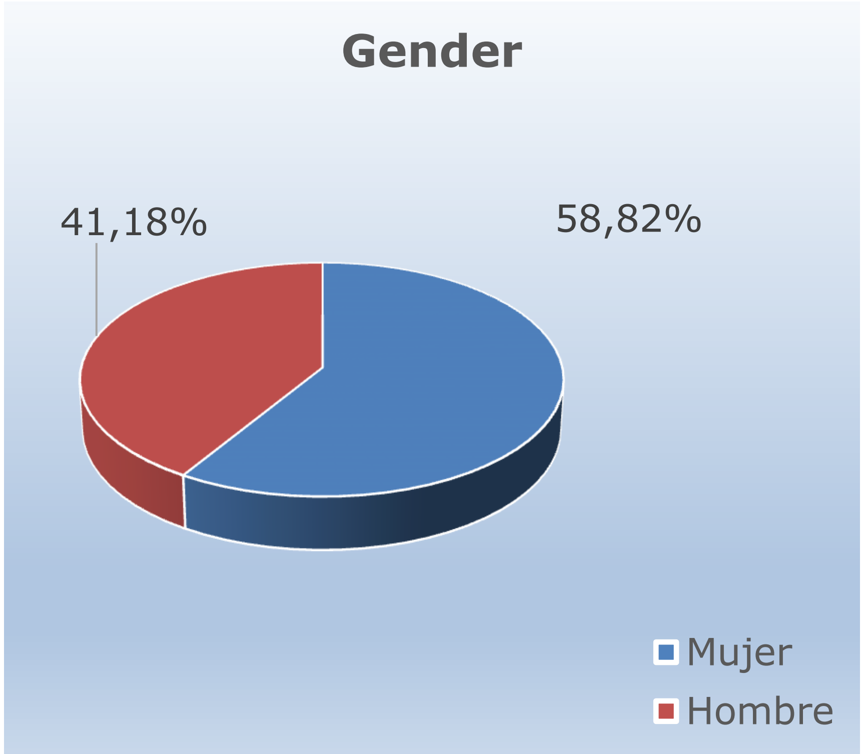
Covides Vineyards-Wineries
ORGANIC CAVAS

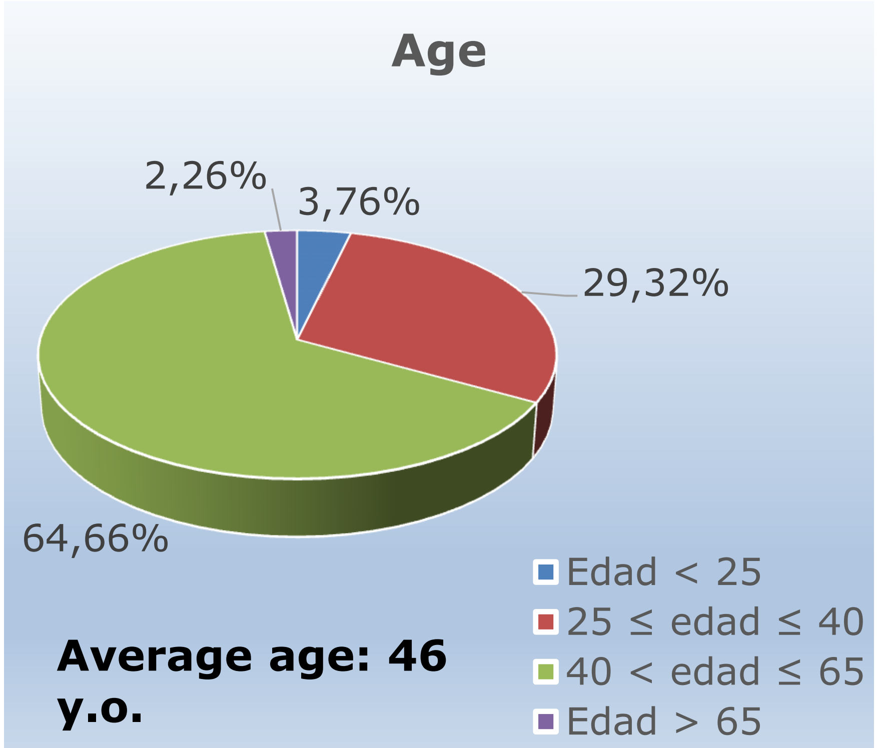
CENTER FOR AGRO-FOOD ECONOMICS AND DEVELOPMENT

❑ Results with ORGANIC CAVAS (Traditionnal method sparkling WINES):

1. Sample characteristics
2. Attitudes & behaviours
3. Perceptions & value «ready to pay».

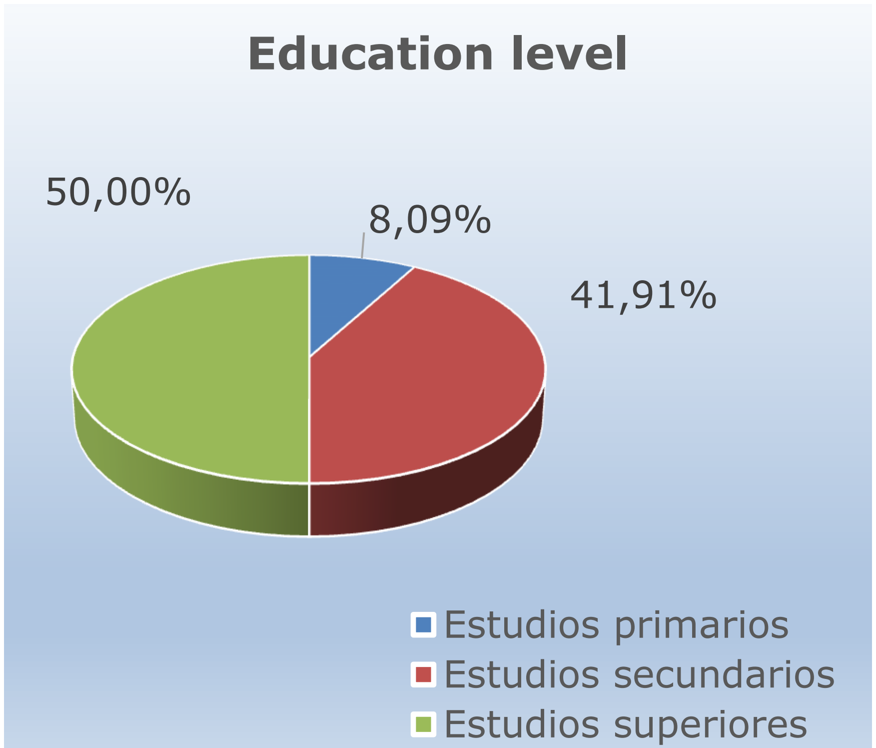
1. Sample characteristics (Organic CAVAS)

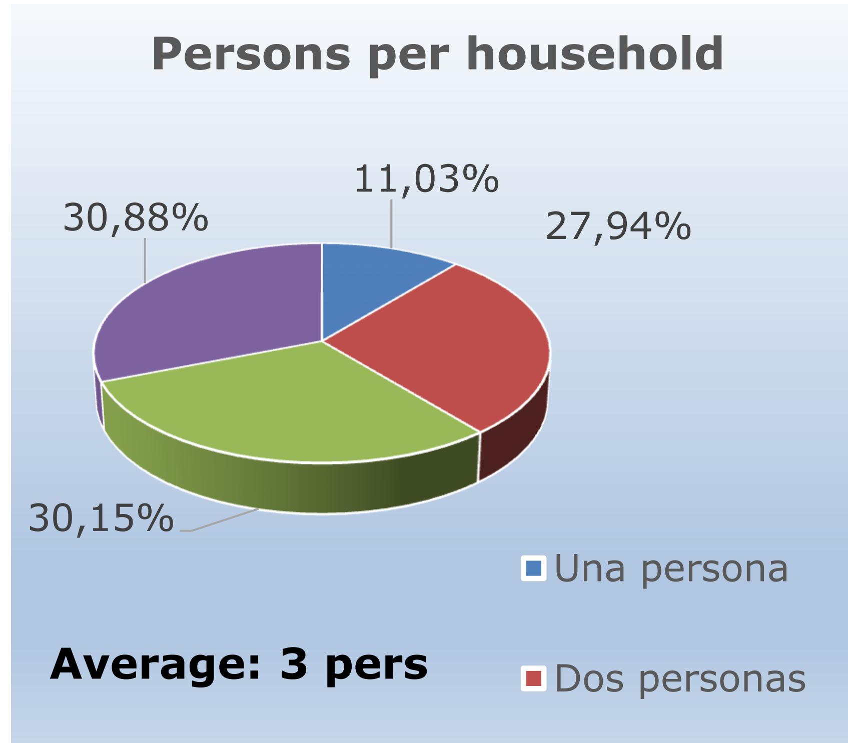




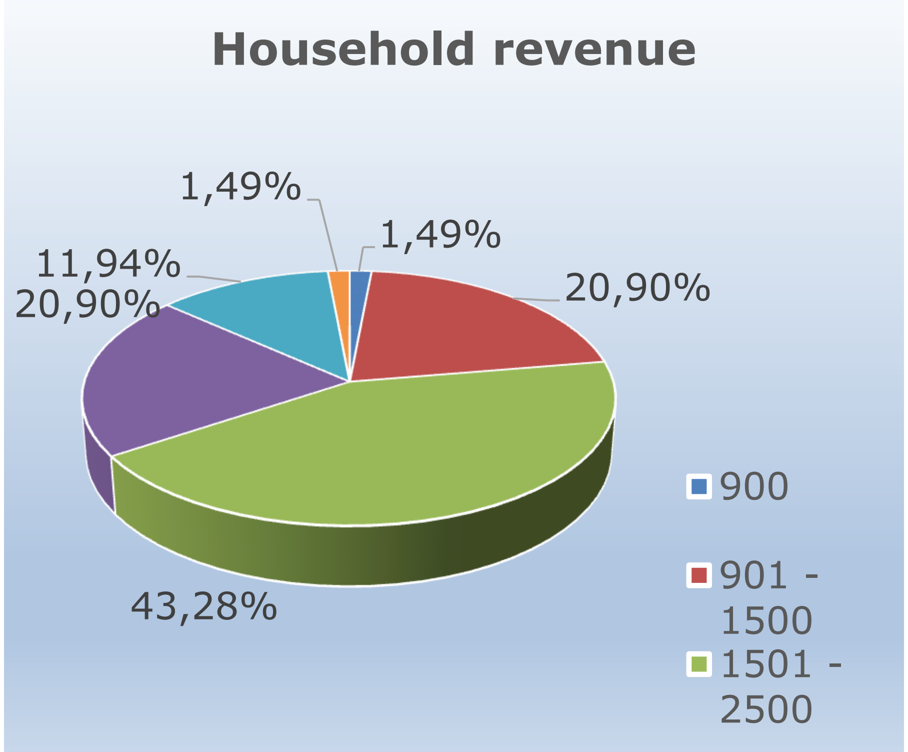
Sample size: 136 cava consumers

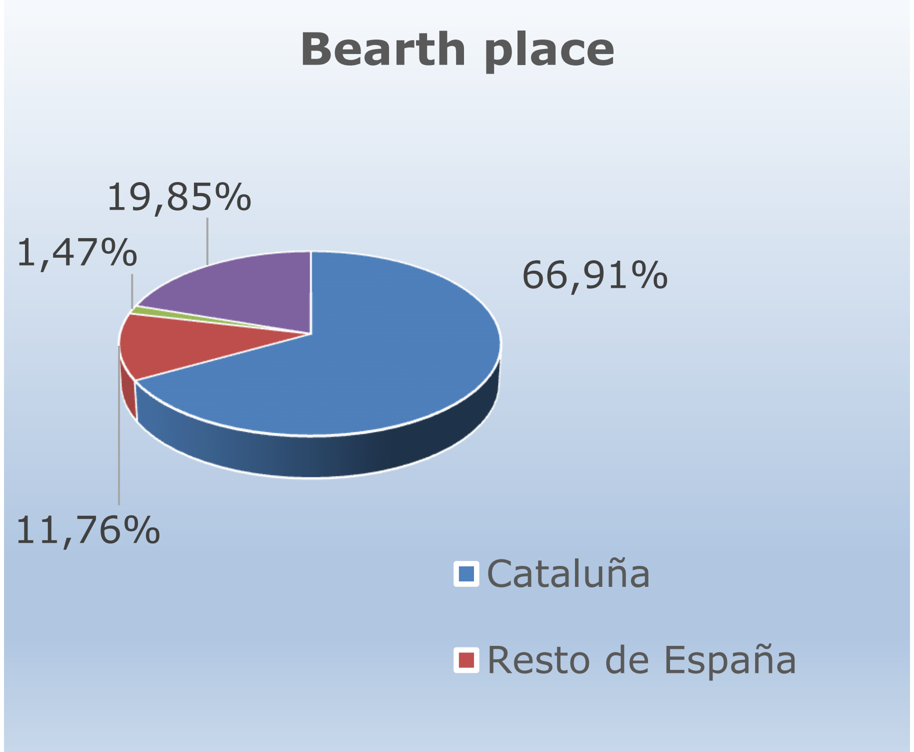
1. Sample characteristics (Organic CAVAS)





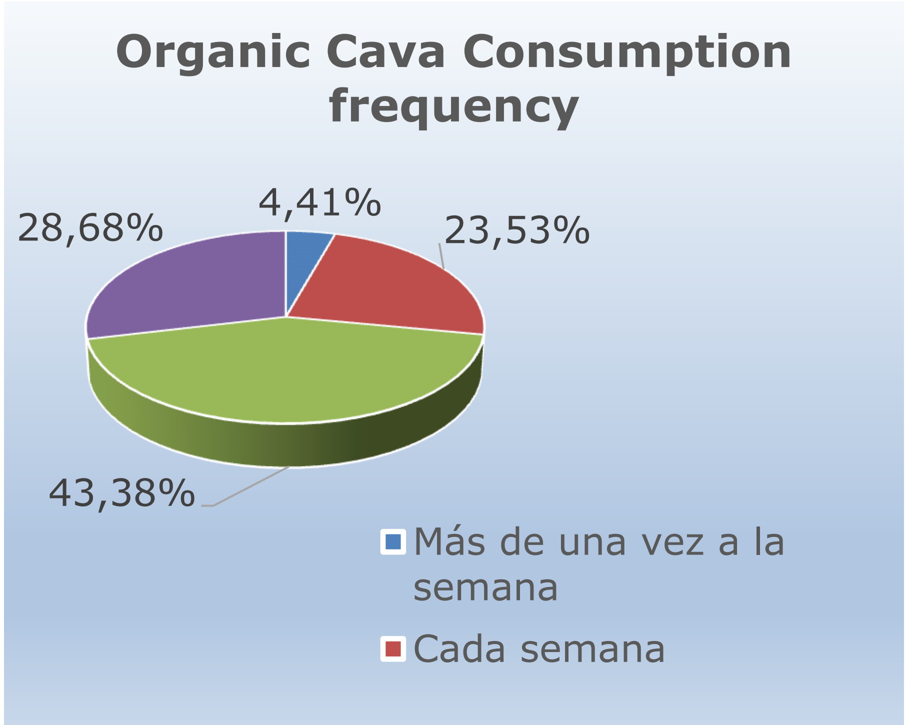
1. Sample characteristics (Organic CAVAS)

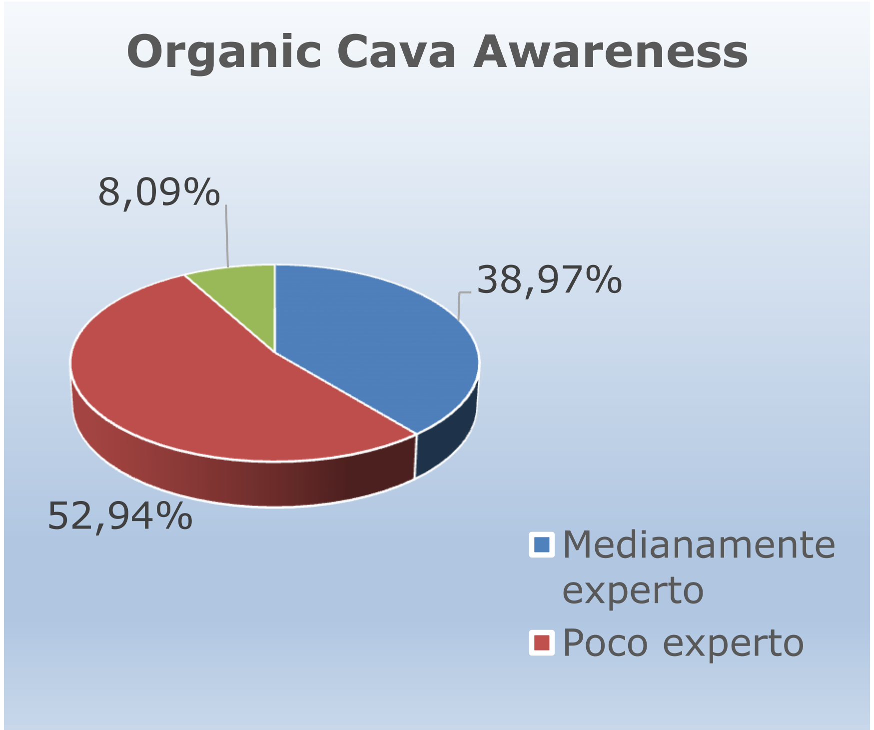




CREDA
CENTER FOR AGRO-FOOD ECONOMICS AND DEVELOPMENT

2. Consumption Frequency and Organic Cava knowledge





Average spending in organic cavas for special occasions: 12,24€

2. Attitudes towards Organic Cavas

	Avg
I like to know organic cavas I usually buy	7,81
I do not need a special occasion to enjoy a bottle of organic cava for dinner	6,76
Organic cava is something I have in common with my good friends	6,50
I am very interested in organic cavas	6,38
I like to drink organic cava with my food	5,06

E4. In a scale from 0 “Totally disagree” to 10 “Totally agree”

2. Purchasing channels ORGANIC CAVAS

	Frequently
Supermarket/Hyper	**63.70%**
«Bodeguita» next to my home	**34.56%**
Specialized shops (vinoteque)	**13.23%**
Direct from cellar (visits)	3.68%
Webs Online specialized	23.53%
Webs Online cellars	1.47%

CREDA
CENTER FOR AGRO-FOOD ECONOMICS AND DEVELOPMENT

2. Decision making in organic CAVA purchasing:

Consult shop owner or responsible	**67,65%**
Consult friends or family	**58,09%**
Consult bottle label	**55,15%**
I am loyal with the organic cava brand I know	**43,38%**
I buy a known brand	**36,76%**
I buy organic Cavas with prizes in wine competitions	25,00%
Consult specific portals in internet	22,79%
I buy an organic cava with a nice bottle	18,38%
I buy an expensive organic cava	14,71%
First I like to taste or samples	11,76%
I look at the image of the shop	8,82%

E8. When you are not sure about which organic cava to buy for a special occasion, you... (you can choose several answers)

CREDA CENTER FOR AGRO-FOOD ECONOMICS AND DEVELOPMENT

2. Decision making in organic wine purchasing:

AOC - Denominación de origen - Cataluya	**58,09%**
Grape variety	**52,21%**
Region of production	**50,74%**
Brand	**47,79%**
Ageing time on the lees	**46,32%**
Organic	**44,85%**
Vintage	39,71%
Country of origin - España	33,82%
Prizes in wine competitions	29,41%
Nice and attractive label	25,00%
Alcohol content	22,06%
Sugar content	18,38%
Tasting notes	16,18%

E9. Which of the following information on a label (or backlabel) is key to know the level of quality for the organic cava. You can choose several answers.

3. Perceptions & value «ready to pay» (conventionnal vs. Organic Cava):

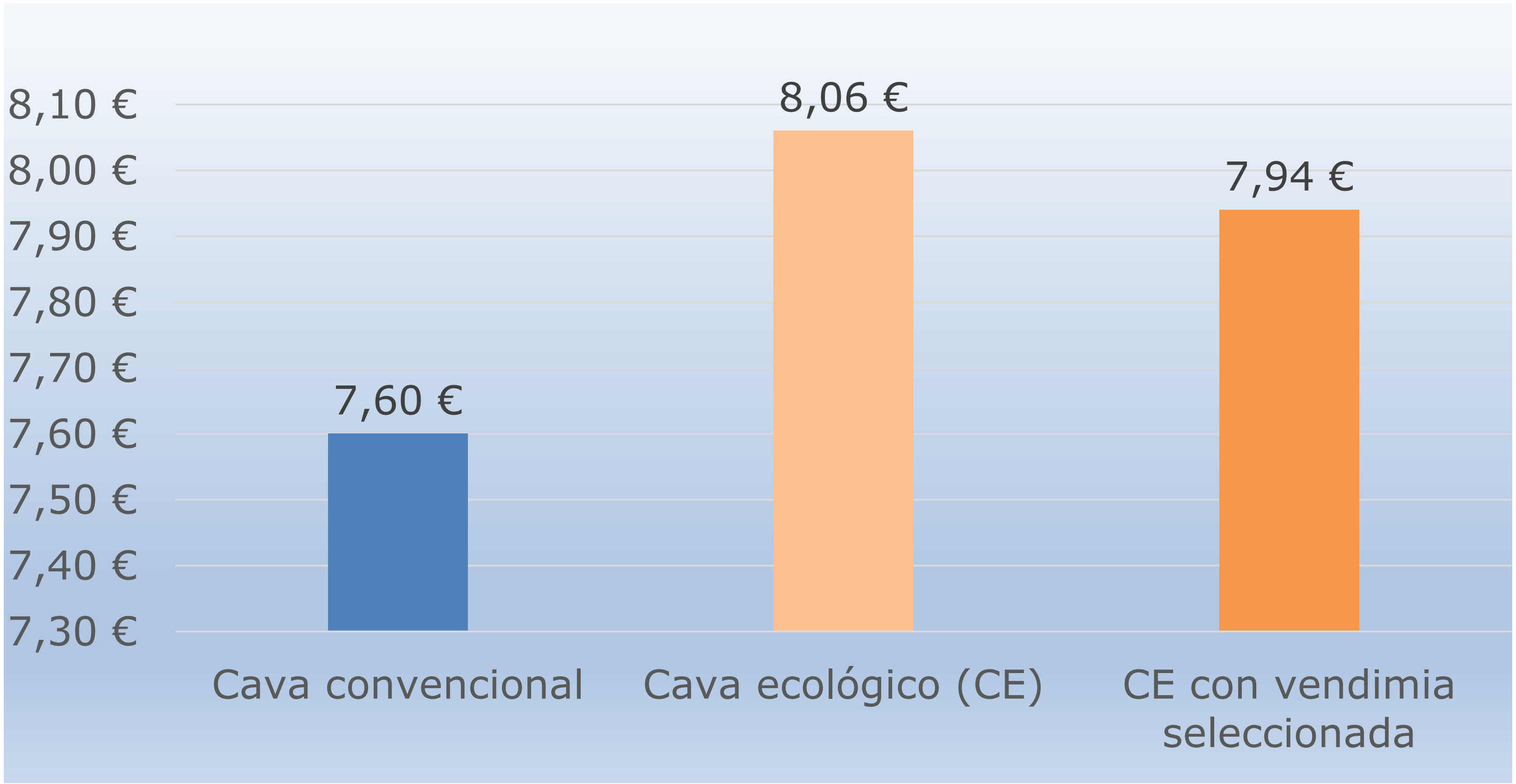
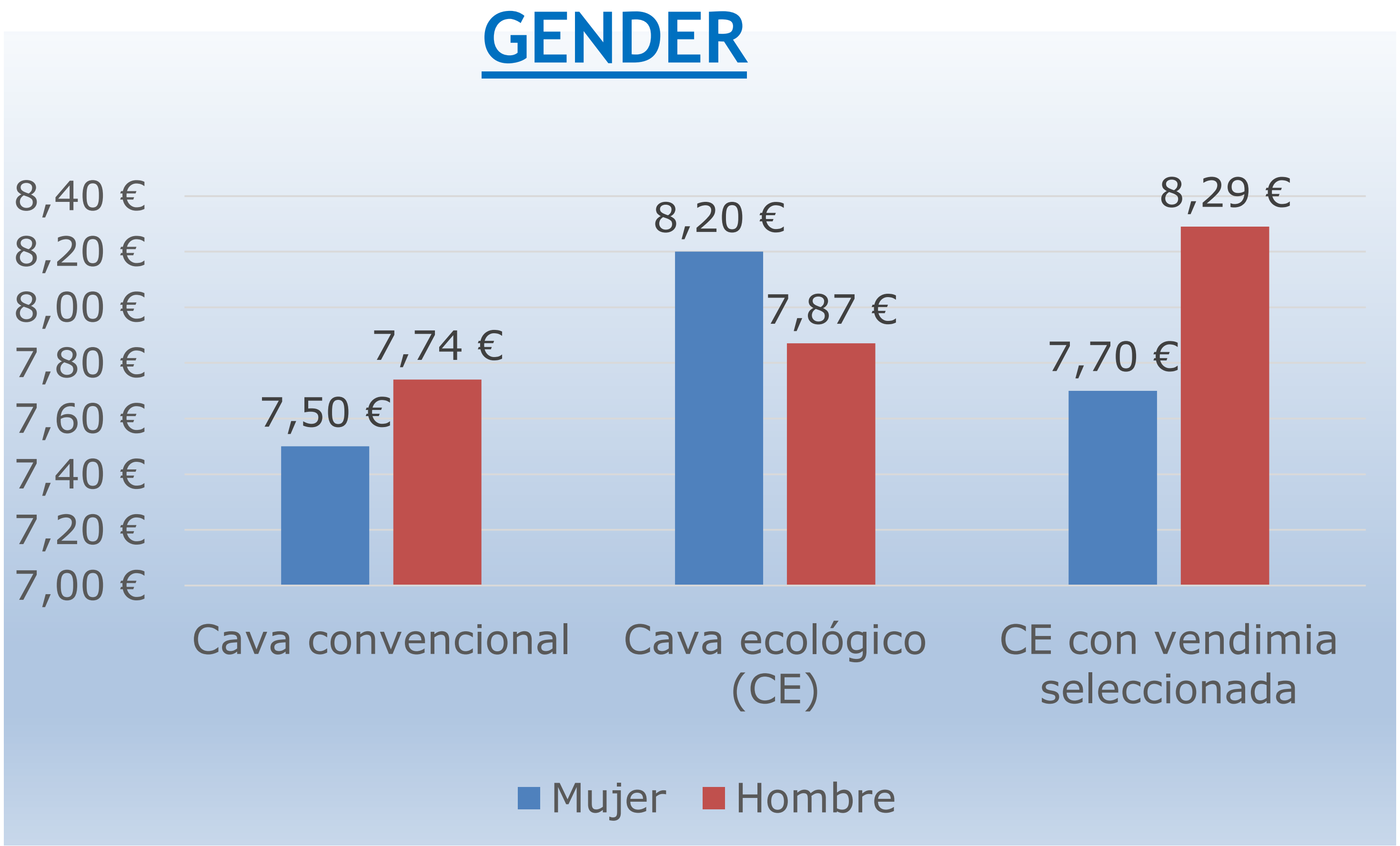


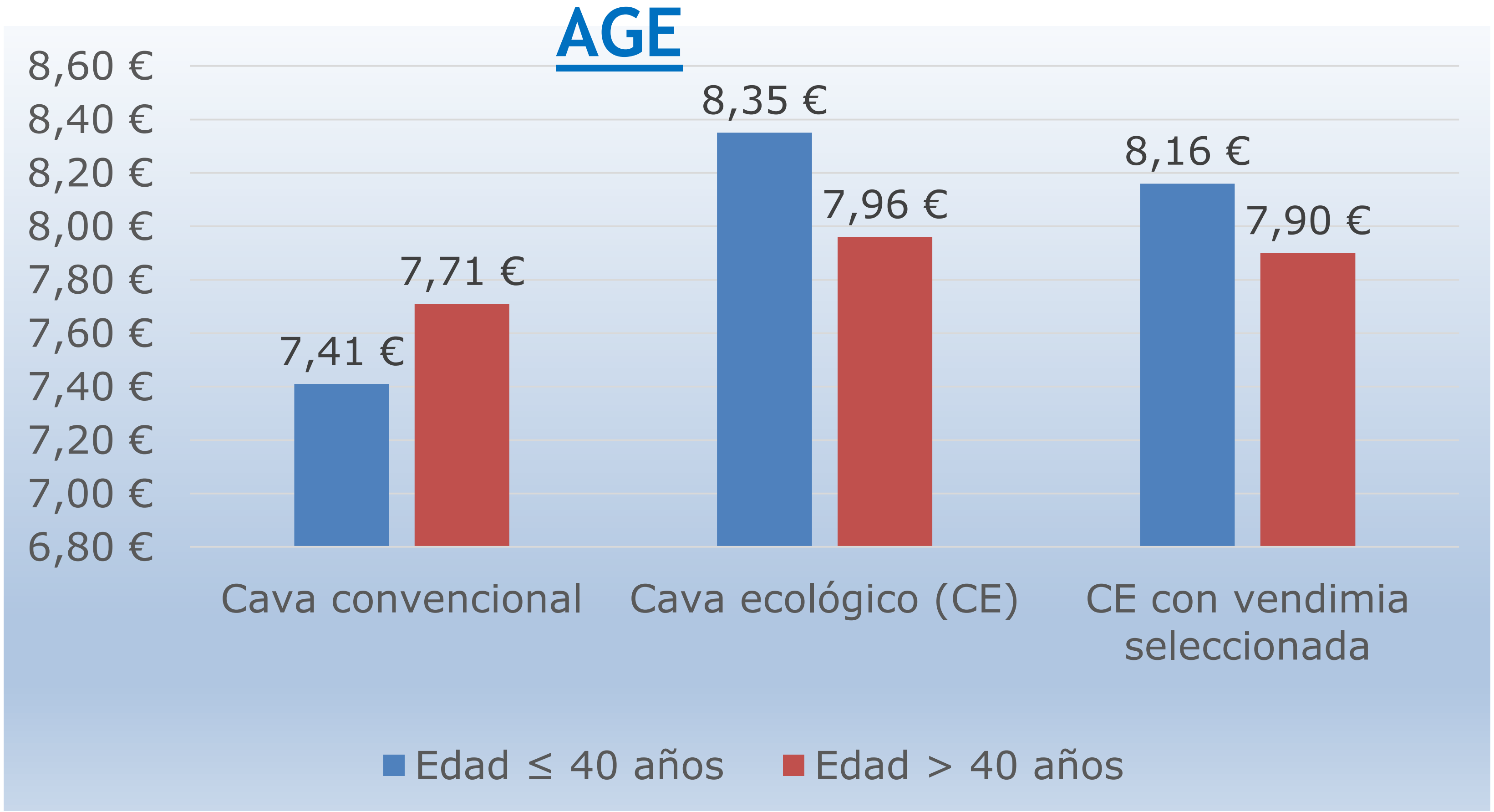
Figure shows average results per cava type

3. Perceptions & value «ready to pay» (conventionnal vs. Organic Cava):

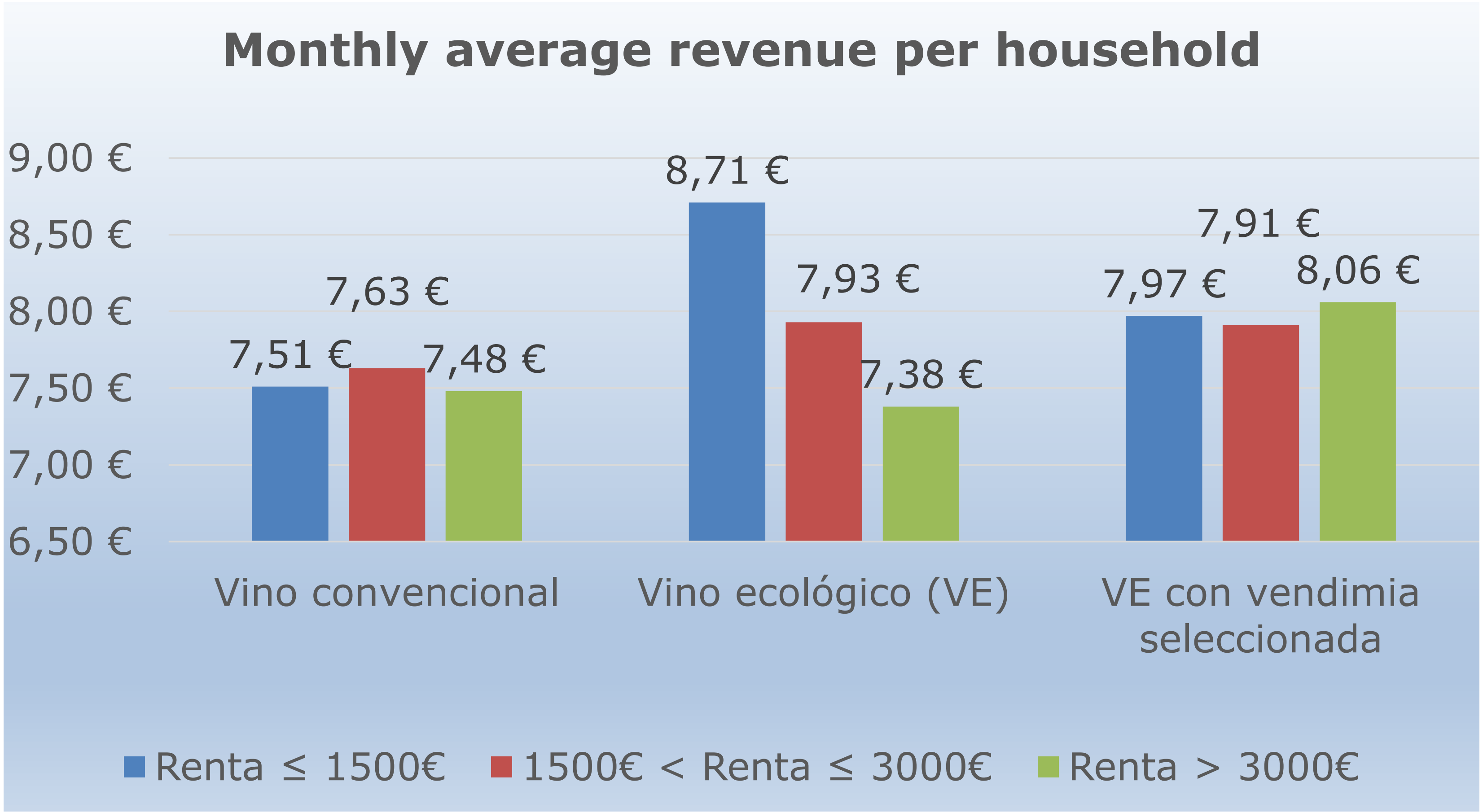


CREDA
CENTER FOR AGRO-FOOD ECONOMICS AND DEVELOPMENT

3. Perceptions & value «ready to pay» (conventionnal vs. Organic Cava):



3. Perceptions & value «ready to pay» (conventionnal vs. Organic Cava): HOUSEHOLD REVENUE



CREDA CENTER FOR AGRO-FOOD ECONOMICS AND DEVELOPMENT

CONSUMER PREFENCES: TRENDS & REASONS BUYING ORGANIC SPARKLING WINES

1. Global trends in wine during pandemia (march-October 20):
Special focus on organic Wines.

2. CREDA Qualitative market survey on Organic Cavas (October 2019)

3. AOC / DOQ Cava data on Organic category 2019

4. Examples of marketing strategies:
Special focus on organic Wines.

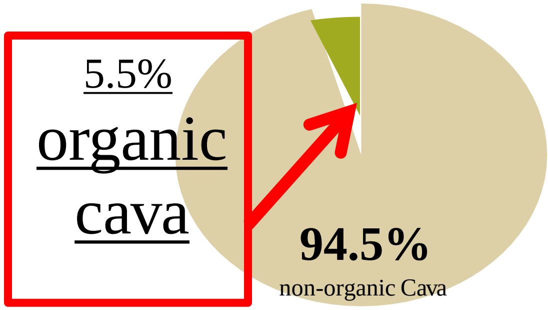
Christophe Marquet

CAVA

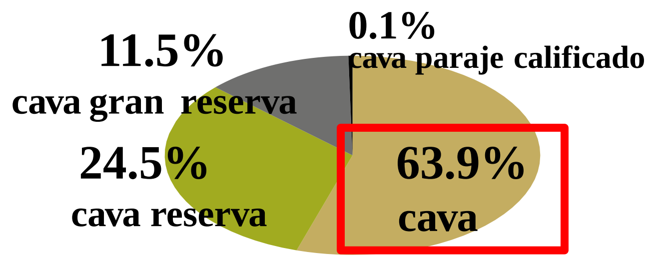
2019
global
Report

FOCUS ON ORGANIC CAVAS CATEGORY

COMMERCIALIZATION of organic Cava



Base: Total Cava



Base: Total Organic Cava

	2016	2017	2018	2019	% change
TOTAL NON-ORGANIC CAVA	241,134,135	246,553,252	233,981,407	235,748,543	0.7%
TOTAL ORGANIC CAVA	4,021,853	5,959,084	10,490,933	13,796,153	31.5%
TOTAL CAVA	245,155,988	252,512,336	244,472,340	249,544,696	2.07%
* Number of bottles.					
% ORGANIC CAVA OF TOTAL CAVA	1.6%	2.4%	4.3%	5.5%	

ORGANIC CAVA	2016	2017	2018	2019	% change
CAVA	2,756,043	3,930,595	5,750,182	8,815,270	53.3%
CAVA RESERVA	1,055,766	1,639,486	3,374,286	3,382,243	0.2%
CAVA GRAN RESERVA	210,044	388,438	1,330,109	1,590,377	19.5%
CAVA DE PARAJE CALIFICADO		520	36,355	8,263	-77.2%
TOTAL ORGANIC CAVA	4,021,853	5,959,084	10,490,933	13,796,153	31.5%
* Number of bottles.					
% PREMIUM ORGANIC CAVA OF TOTAL ORGANIC CAVA PRODUCED	31.5%	34.0%	45.2%	36.1%	

CONSUMER PREFENCES: TRENDS & REASONS BUYING ORGANIC SPARKLING WINES

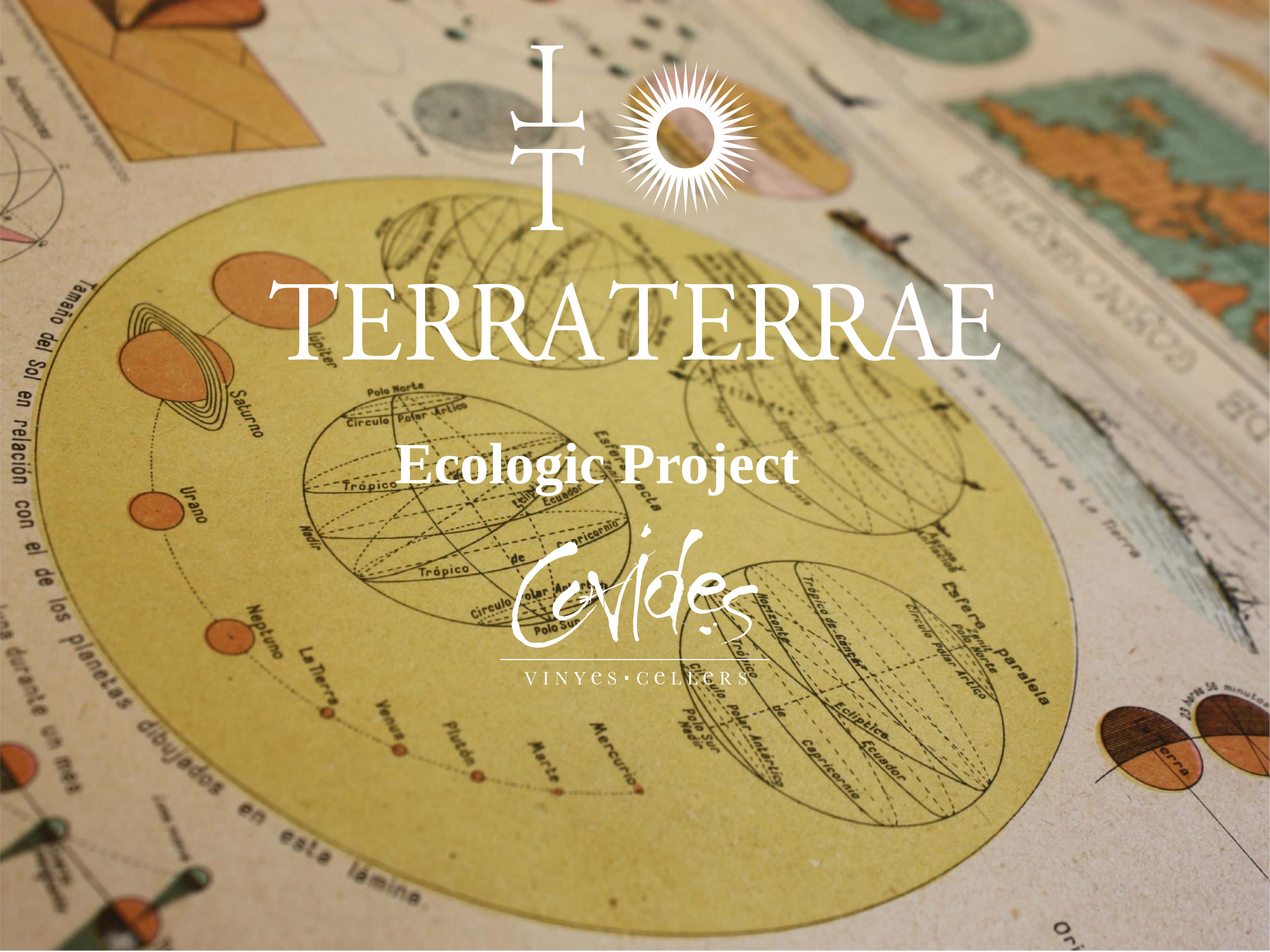
1. Global trends in wine during pandemia (march-October 20): Special focus on organic Wines.

2. CREDA Qualitative market survey on Organic Cavas (October 2019)

3. AOC / DOQ Cava data on Organic category 2019

4. Examples of marketing strategies: Special focus on organic Wines.

Christophe Marquet



TERRA TERRAE

Ecologic Project

Covides

VINYES · CELLERS

Territory and sustainability


Respect for Nature
and environment
CONSELL CATALÀ DE LA PRODUCCIÓ AGRÀRIA ECOLÒGICA
CCPAE

Certification ecologic and Vegan

TERRATERRAE

CONSELL CATALÀ DE LA PRODUCCIÓ AGRÀRIA ECOLÒGICA
CCPAE

EUROPEAN VEGETARIAN UNION
V-LABEL.EU
VEGANO

EmanaGreen®
PAPEL DE PIEDRA®

DESIGN
THE BRAND

NAME.
Evocate the earth.

LOGOTYPE.
Tipography Adobe Garamond Pro. Romana elegant, “latin”.

IMAGOTYPE.
Cross with two T:
The 4 cardinal points and the Sun (synonymus of life)

TERRATERRAE

Cavas
D.O.Q Cava

Materials and activities

National & International Wine competitions

TERRA TERRAE

CWSA®
Best Value
CHINA WINE & SPIRITS AWARDS
中国环球葡萄酒及烈酒大奖
2018

Golden Leaf · 2015
Vinum Nature Awards

Silver Leaf · 2015
Vinum Nature Awards

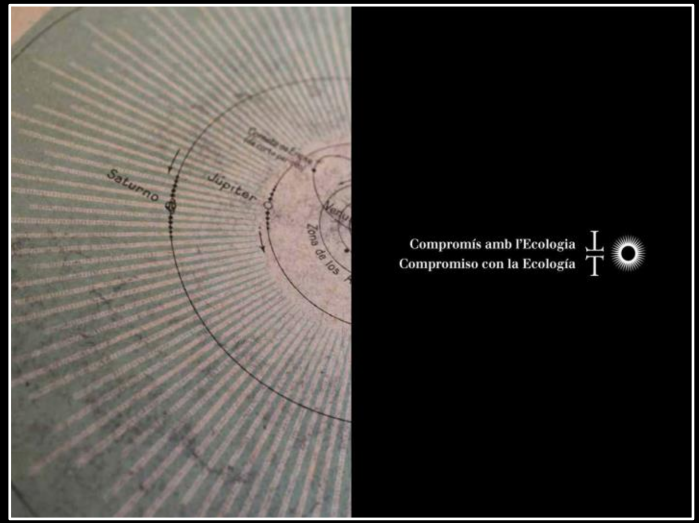
Premios
ECO VINO
AWARDS 2019

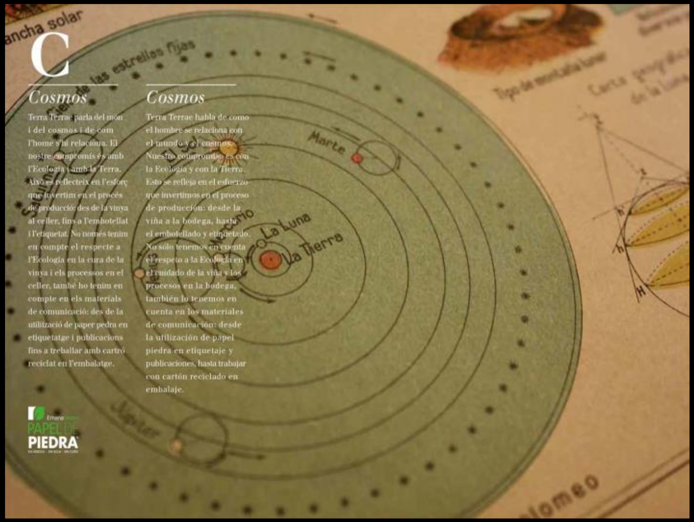
JAPAN
WINE
CHALLENGE

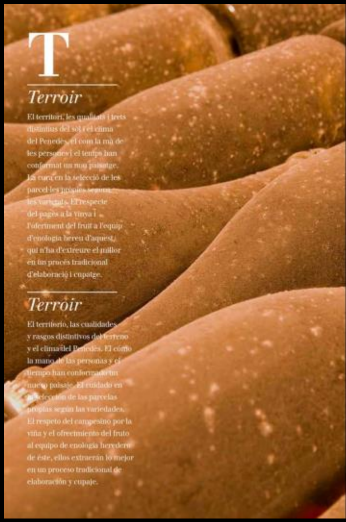
ACADÈMIA TASTAVINS
PENEDÈS
www.academiatastavins.com

vinari
VILAFRANCA DEL PENEDÈS
Premis dels vins catalans

Sales Leaflet **Terra Terrae**





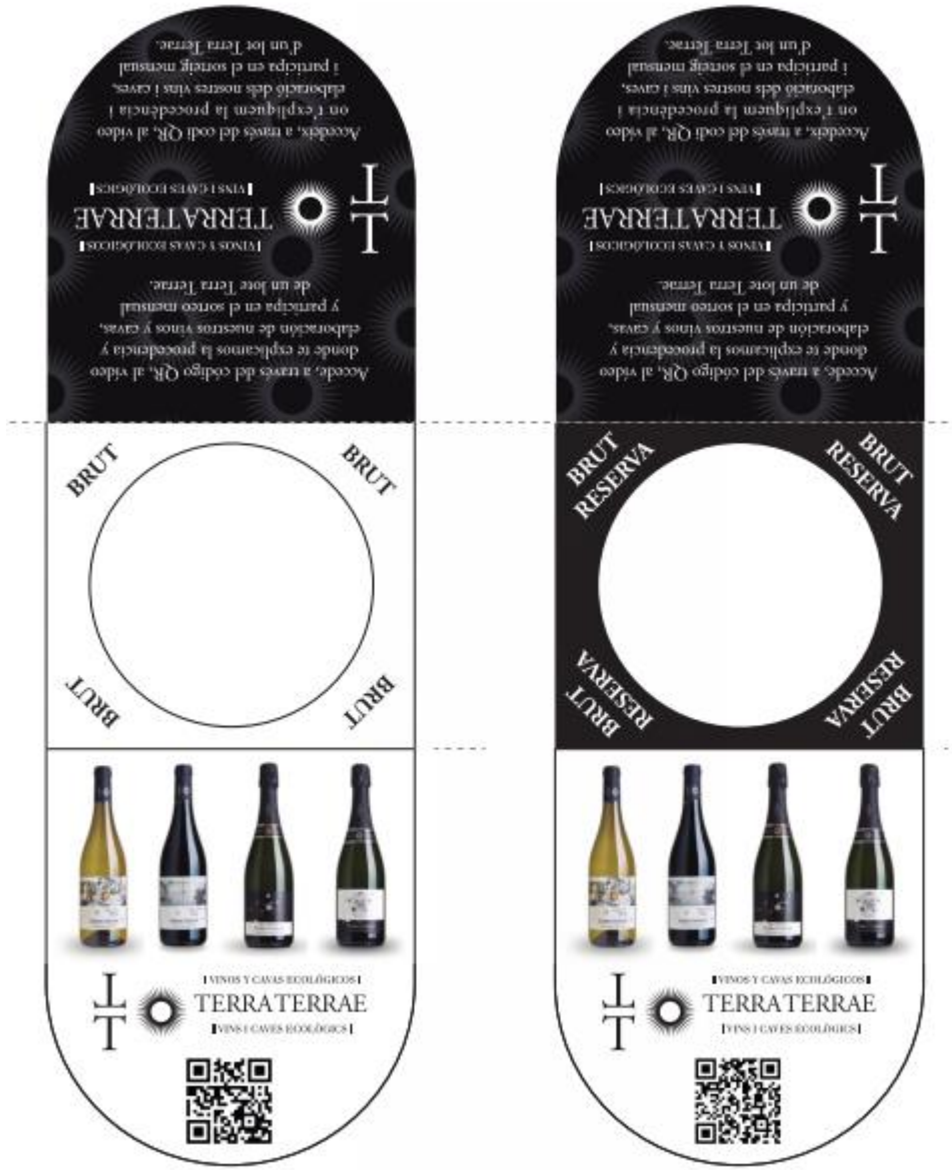


Materials and activities

· Nordic Walking in ecologic vineyards:

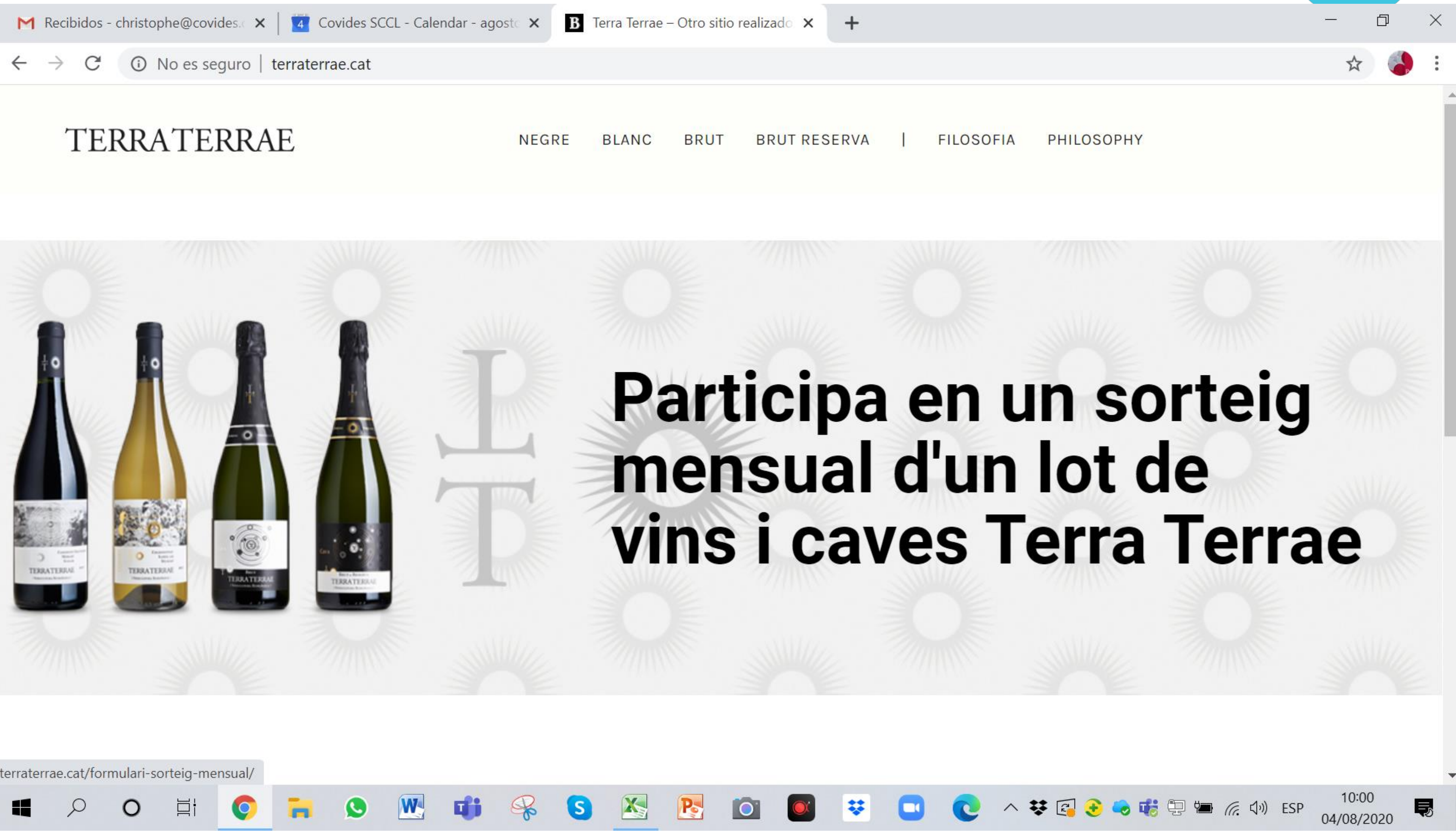
ONLINE TERRATERRAE.CAT

Covides
VINYES · CELLERS

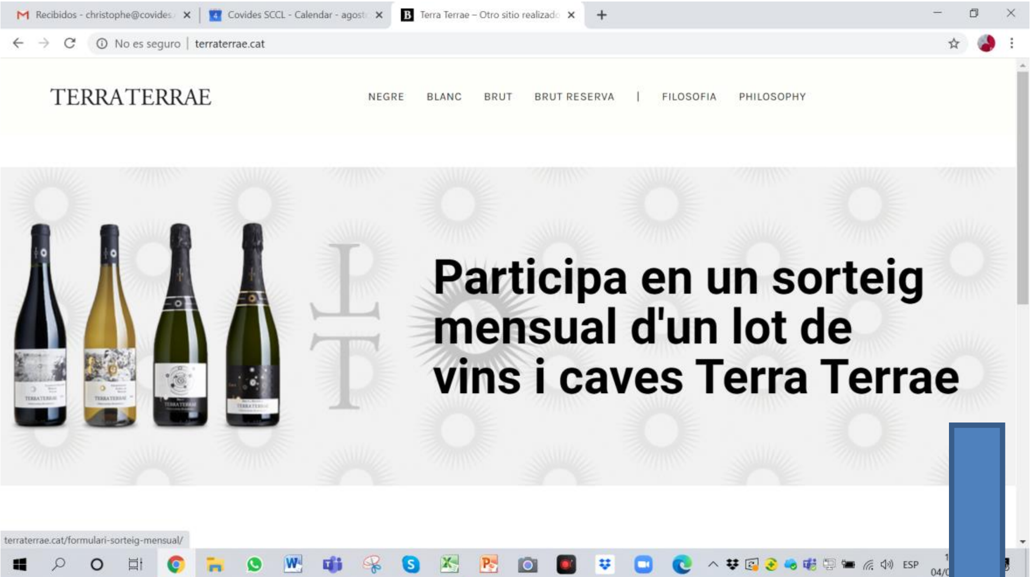


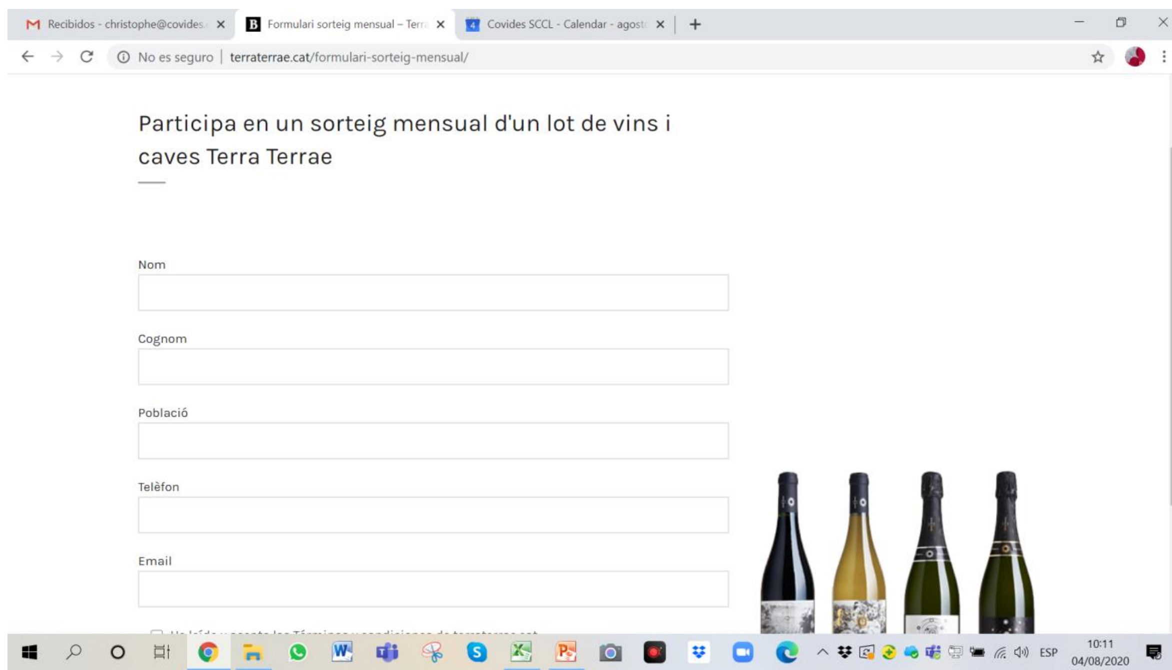
vinitrac

ONLINE TERRATERRAE.CAT



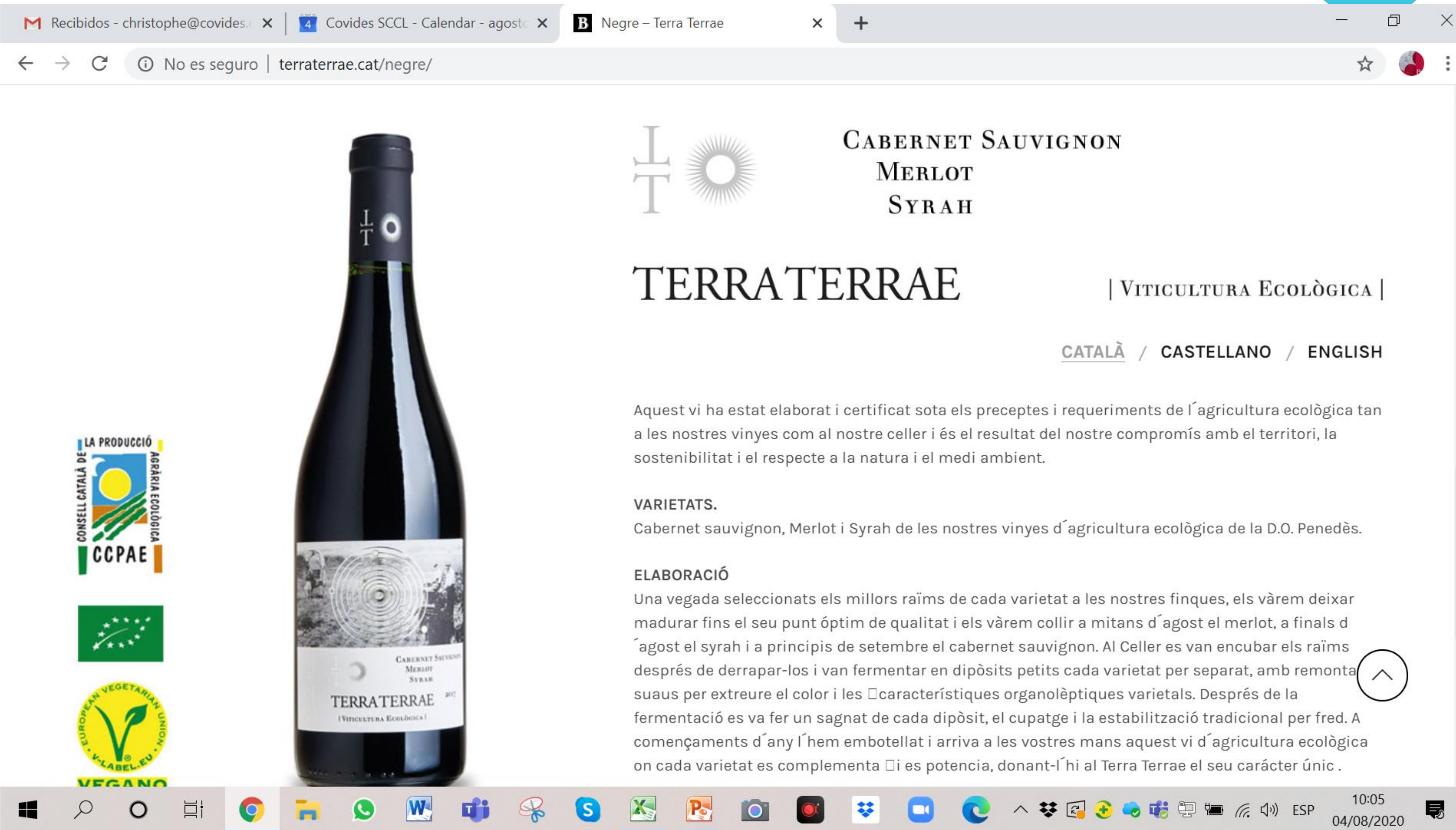
ACCIÓN ONLINE TERRATERRAE.CAT – Dir. Comercial





ONLINE TERRATERRAE.CAT

ONLINE TERRATERRAE.CAT



vinitrac.

CONSUMER PREFENCES: TRENDS & REASONS BUYING ORGANIC SPARKLING WINES

1. Global trends in wine during pandemia (march-October 20):
   Special focus on organic Wines.
2. CREDA Qualitative market survey on Organic Cavas (October 2019)
3. AOC / DOQ Cava data on Organic category 2019
4. Examples of marketing strategies:
   Special focus on organic Wines.

MANY THANKS

Christophe Marquet