

## Still, Sparkling and Fortified Wine - UK - October 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“With limited plantings and uncertain harvests, demand for Prosecco may outstrip supply in the near future, helping to push up prices but also creating opportunities for other sparkling wines such as Crémant and English Sparkling Wine to capitalise upon.”  
– Chris Wisson, Senior Drinks Analyst

### This report looks at the following areas:

- Grape type trumps country in shoppers' wine choice
- Prosecco should look to premiumise to avoid falling into the Cava trap
- The importance of impulse purchases
- Smaller bottles can have big potential

This report analyses the UK market for still, sparkling and fortified wines, including sales through both the off- and on-trade. Coverage in the report is restricted to wine of fresh grape, produced from the naturally fermented juice of the grape and includes low and non-alcoholic varieties.

The on-trade includes premises with a licence to serve alcohol for consumption on the premise, mainly pubs/bars but also nightclubs, hotels and the hospitality sector.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Still, Sparkling and Fortified Wine - UK - October 2015

**Report Price:** £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Products covered in the report

Still wines

Sparkling wines

Fortified wines

Excluded from the report

### Executive Summary

The market

Value growth in the wines market slows down

Figure 1: Forecast of UK value sales of wines, 2010-20

Figure 2: Forecast of UK volume sales of wines, 2010-20

Still wine sees values fall into decline

The off-trade outperforms the on-trade

Companies, brands and innovation

Accolade Wines leads a fragmented market

Hardys races clear in the still wine market

Figure 3: Retail value sales of the leading wine brands in the UK, 2014/15\*

Total category adspend nudges upwards in 2014

Fruit flavours at the forefront of NPD activity

The consumer

Still wines are still the most popular option

Figure 4: Purchase of wines, by type and location, July 2015

Supermarkets dominate wine sales

Only 28% of still wine buyers would pay more than £10 per bottle

Colour of wine is the leading price-exclusive choice factor

Figure 5: Choice factors when buying still wine, July 2015

France scores strongly for a number of attributes

Screw caps can tap into the premium/fine wine category

Figure 6: Interest in types of wine products, July 2015

What we think

### Issues and Insights

Grape type trumps country in shoppers' wine choice

The facts

The implications

Prosecco should look to premiumise to avoid falling into the Cava trap

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Still, Sparkling and Fortified Wine - UK - October 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The facts

The implications

The importance of impulse purchases

The facts

The implications

Smaller bottles can have big potential

The facts

The implications

## The Market – What You Need to Know

Value growth in the wine market slows down

Still wine sees values fall into decline

Sparkling wines continue to soar and Champagne recovers

Fortified wines show little annual variation

The off-trade outperforms the on-trade

## Market Size and Segmentation

Value growth in the wine market slows down

Figure 7: Total value and volume sales of wines, at current and constant prices, 2010-20

Figure 8: Forecast of UK value sales of wines, 2010-20

Figure 9: Forecast of UK volume sales of wines, 2010-20

Still wine sees values fall into decline

Figure 10: Total value and volume sales of still wines, at current and constant prices, 2010-20

Figure 11: Forecast of UK value sales of still wines, 2010-20

Sparkling wines continue to soar

Figure 12: Total value and volume sales of sparkling wines, at current and constant prices, 2010-20

Figure 13: Forecast of UK value sales of sparkling wines, 2010-20

Champagne continues to stabilise

Figure 14: Total value and volume sales of Champagne, at current and constant prices, 2010-20

Figure 15: Forecast of UK value sales of Champagne, 2010-20

Fortified wine value sales stagnate

Figure 16: Total value and volume sales of fortified wines, at current and constant prices, 2010-20

Figure 17: Forecast of UK value sales of fortified wines, 2010-20

## Channels to Market

The off-trade outperforms the on-trade

Figure 18: UK volume sales of wines in the on- and off-trade, 2013-15

## Market Drivers

Taxation on alcoholic drinks stabilises

Figure 19: UK excise duty rates for wines, 2005-15

Wages recover to boost consumer confidence

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Still, Sparkling and Fortified Wine - UK - October 2015

**Report Price:** £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

A weakened Sterling has added further price pressures

Figure 20: Annual average exchange rates for Sterling, 2009-14

An embattled on-trade industry

UK consumers continue to cut back on alcohol

Figure 21: Trends in UK per capita consumption of '100% alcohol', 2007-14

Bridging the gender divide

Population changes could pose challenges but also opportunities

## Key Players – What You Need to Know

Accolade Wines leads a fragmented market

Hardys races clear in the still wine market

Proseccos drive growth in the sparkling wines market

Robust brand growth within Champagne

Buckfast growing fast in fortified wines

Total category adspend nudges upwards in 2014

Fruit flavours at the forefront of NPD activity

## Market Share

Accolade Wines leads a fragmented market

Figure 22: Leading manufacturers' shares of wine sales in the UK off-trade, 2014/15\*

Hardys races clear in the still wine market

Figure 23: Retail value sales of the leading still wine brands in the UK, 2012/13-2014/15

Mixed performances among the middle-tier brands

Proseccos drive growth in the sparkling wines market

Figure 24: Retail value sales of the leading sparkling wine brands in the UK, 2012/13-2014/15

Robust brand growth within Champagne

Figure 25: Retail value sales of the leading Champagne brands in the UK, 2012/13-2014/15

Buckfast growing fast

Figure 26: Retail value sales of the leading fortified wine brands in the UK, 2012/13-2014/15

## Brand Communication and Promotion

Total category adspend nudges upwards in 2014

Figure 27: Recorded above-the-line, online display and direct mail total advertising expenditure on wines, by category, 2012-15

Retailers dominate advertising in the market

Figure 28: Top 15 highest-spending brands in the dark spirits and liqueurs category, 2012-15

TV advertising becomes even more popular

Selected still wine campaigns

Selected sparkling wine campaigns

Aligning with sports...

...and with films

## Launch Activity and Innovation

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Still, Sparkling and Fortified Wine - UK - October 2015

**Report Price:** £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Still wines

Launches which are utilising technology

High hopes for fruit-flavoured wines

Sparkling wines

Fortified wines

Merging the on- and off-trade...

## The Consumer – What You Need to Know

Still wines are still the most popular option

Supermarkets dominate wine purchases

Only 28% of still wine buyers would pay more than £10 per bottle

Colour of wine is the leading price-exclusive choice factor

France scores strongly for a number of attributes

Screw caps welcome in the premium/fine wine category

## Purchase of Wines

Still wines are still the most popular option

Figure 29: Purchase of wine, by type, July 2015

Figure 30: Repertoire of purchase of wine, by type, July 2015

Red and wine have equal purchasing penetration

Figure 31: Purchase of still wines, by type and location, July 2015

Prosecco's fortunes bubbling up

Figure 32: Purchase of sparkling wines, by type and location, July 2015

Fortified wine remains relatively niche

Figure 33: Purchase of fortified and other wines, by type and location, July 2015

## Purchasing Locations and Habits

Supermarkets dominate wine sales

Figure 34: Outlets used to buy wines in the last six months, July 2015

A third of wine buyers buy it at pubs

Impulse purchases provide opportunities for wine brands

Figure 35: Planned and impulse buying when shopping for wine, July 2015

## Willingness to Spend on Wines

Only 28% of still wine buyers would pay more than £10 per bottle

Figure 36: Willingness to spend on still white/red/rosé wine, per standard bottle, July 2015

Willingness to spend on Champagne continues to outstrip other sparkling wines

Figure 37: Willingness to spend on sparkling wine and Champagne, per standard bottle, July 2015

Only 16% of sparkling wine buyers would spend more than £20 per bottle

## Choice Factors

Colour of wine is the leading choice factor

Figure 38: Choice factors when buying still wine, July 2015

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Still, Sparkling and Fortified Wine - UK - October 2015

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Grape type is of higher importance than country of production  
Brand name and alcohol content round out the top five factors  
Other factors resonate with a third or fewer retail wine buyers

## Characteristics Associated with Wines' Countries of Origin

France scores strongly for a number of attributes  
Figure 39: Perceptions of wines from different countries, July 2015  
Australian wines are seen as modern but fall down on sophistication  
Italian wines score strongly among under-35s  
Limited responses for the other types of wines

## Interest in Types of Wine Products

Screw caps can tap into the premium/fine wine category  
Figure 40: Interest in types of wine products, July 2015  
Room for innovation in sparkling wine  
Interest in new types  
Potential for a more accessible positioning  
Opportunities for cocktails and flavoured wines  
Price-marking and single-serves could also appeal to one in five each

## Appendix – Data Sources and Abbreviations

Data sources  
Fan chart forecast  
Abbreviations

## Appendix – Market Size and Segmentation

Figure 41: Best- and worst-case forecasts for the total wine market, by value, 2015-20  
Figure 42: Best- and worst-case forecasts for the total wine market, by volume, 2015-20  
Figure 43: Best- and worst-case forecasts for the still wine market, by value, 2015-20  
Figure 44: Best- and worst-case forecasts for the still wine market, by volume, 2015-20  
Figure 45: Forecast of UK volume sales of still wines, 2010-20  
Figure 46: Best- and worst-case forecasts for the sparkling wine market, by value, 2015-20  
Figure 47: Best- and worst-case forecasts for the sparkling wine market, by volume, 2015-20  
Figure 48: Forecast of UK volume sales of sparkling wines, 2010-20  
Figure 49: Best- and worst-case forecasts for the Champagne market, by value, 2015-20  
Figure 50: Best- and worst-case forecasts for the Champagne market, by volume, 2015-20  
Figure 51: Forecast of UK volume sales of Champagne, 2010-20  
Figure 52: Best- and worst-case forecasts for the fortified wine market, by value, 2015-20  
Figure 53: Best- and worst-case forecasts for the fortified wine market, by volume, 2015-20  
Figure 54: Forecast of UK volume sales of fortified wines, 2010-20

## Appendix – Market Share

Figure 55: Leading manufacturers' shares of wine sales in the UK off-trade, 2014/15\*

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Still, Sparkling and Fortified Wine - UK - October 2015

**Report Price:** £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 56: Retail volume sales of the leading still wine brands in the UK, 2012/13-2014/15

Figure 57: Retail volume sales of the leading sparkling wine brands in the UK, 2012/13-2014/15

Figure 58: Retail volume sales of the leading Champagne brands in the UK, 2012/13-2014/15

Figure 59: Retail volume sales of the leading fortified wine brands in the UK, 2012/13-2014/15

**BUY THIS  
REPORT NOW**

VISIT: [store.mintel.com](http://store.mintel.com)

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)