

Report Price: £1095.00 | \$1377.95 | €1276.55

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



 "With consumers still experiencing anxiety in the wake of the Brexit vote and political turmoil in 2016, confidence remains low, affecting the willingness of Irish consumers to drink wine outside of the home. Moving forward into 2017, consumers are likely to remain reserved with their spending on wine slowing down market growth."
Brian O'Connor, Research Analyst

This report looks at the following areas:

- Where are Irish consumers purchasing wine?
- What is the size of the wine industry in Ireland?
- What impact will the changes to the legislation regarding alcohol have on the wine industry?
- Who are the key distributors in the wine industry in Ireland?
- What are the alternatives to consuming wine?

The wine industry in Ireland continues to follow the overall trend within the alcohol market, with Irish consumers increasingly drinking at home as opposed to via the on-trade channels. Lower consumer confidence will see this trend continue in 2017 as consumers seek to reduce their leisure spending.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

арас +61 (0) 2 8284 8100

EMAIL: 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



Report Price: £1095.00 | \$1377.95 | €1276.55

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

Issues covered in this Report

Executive Summary

The market

Figure 1: Total wine sales, by segment, by value, NI and RoI, 2016

Forecast

Figure 2: Indexed total wine sales, by value, IoI, on-trade and off-trade, 2011-21

Market factors

Increases in wine excise for NI and RoI

Discounters could reap the benefits of higher wine costs

Consumer sentiment falls between 2015 and 2017

Chile trumps Australia

Companies and innovations

The consumer

White wine most preferred type among Irish consumers

Figure 3: Types of wine consumers have drunk in home the last six months, Ni and RoI, April 2016

Grape type and special offers motivate consumers to buy wine

Figure 4: Attributes (excluding price) which would see consumers choose one product over another when buying wine, NI and RoI, November 2016

Descriptive terms highly important for targeting wine to Irish women

Figure 5: Agreement with statements relating to wine, NI and RoI, November 2016

The Market – What You Need to Know

Low growth in IoI wine market

White wine accounts for largest sector

Increases in wine excise for NI and RoI

Discounters could reap the benefits of higher wine costs

Consumer sentiment falls between 2015 and 2017

Chile trumps Australia

Market Size and Segmentation

Growth in the wine market stalled by lower consumer sentiment

Figure 6: Total wine sales, by value, IoI, NI and RoI, 2011-21

Figure 7: Total wine sales, by volume, IoI, NI and RoI, 2011-21

On-trade improves in RoI, declines in NI

Figure 8: Total wine sales, by value, IoI, NI and RoI, on-trade, 2011-21

Figure 9: Total wine sales, by volume, IoI, NI and RoI, on-trade, 2011-21

Off-trade sees year-on-year growth

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1377.95 | €1276.55

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

Figure 10: Total wine sales, by value, IoI, NI and RoI, off-trade, 2011-21

Figure 11: Total wine sales, by volume, IoI, NI and RoI, off-trade, 2011-21

2017 likely to see price inflation for NI off-trade

Figure 12: Sterling (£) to euro (€) exchange rate, 2010-17

White wine continues to be most valuable segment in IoI

Figure 13: Total wine sales, by segment, by value, NI and RoI, 2011-16

Market Drivers

Increases in wine tax and duty impacting sales

Figure 14: Excise rates for a €9 standard bottle of wine, RoI, 2011-16

Figure 15: UK excise duty rates for wines, 2011-16

UK and Ireland wines have highest excise rates in EU

Figure 16: Excise rates on a bottle of wine (€) for selected EU countries, 2016

Discounters could reap the benefits of higher wine costs

Figure 17: Estimated market share of off-trade distribution channels for wine (volume sales), RoI, 2012 and 2015

Consumer sentiment waning after Brexit and Trump election

Figure 18: Consumer confidence index, RoI, October 2015-December 2016

Figure 19: Consumer sentiment index, NI, Q1 2012-Q4 2016

Figure 20: How consumers feel about their future personal situation after the results of Brexit, NI and RoI, August 2016

Consumers see a night out as being more expensive

Figure 21: Agreement with selected statements relating to nights out of the home, NI and RoI, August 2016

Figure 22: Consumer Price Index for all alcoholic beverages and wine, UK/NI, 2011-16

Figure 23: Consumer Price Index for all alcoholic beverages and wine, RoI, 2011-17

Irish consumers shift in wine preference

Figure 24: Number of cases of table wine sold, by country of origin, RoI, 2008-15

Natural disasters and extreme weather an issue for wine crops

Key Players and Innovations – What You Need to Know

Diageo leaves the table

Health and wellness trends are the biggest threat to wine consumption

Craft properties not being received

Industry terms not resonating with consumers

Who's Innovating?

2016 sees increase in wine launches for the UK and Ireland Figure 25: New products launched within the wine sector in the UK and Ireland, 2013-17

Wine in a can

Wine and alcohol consumption in the future

Key Players

Barry & Fitzwilliam

Key Facts

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1377.95 | €1276.55

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

Product Portfolio **Direct Wine Shipments** Key Facts Product Portfolio Brand NPD **Recent Developments** Winemark Key Facts Product Portfolio Recent Developments James Nicholson Wine Kev Facts Product Portfolio Brand NPD **Recent Developments** The Corkscrew Key Facts Product Portfolio Brand NPD Red Nose Key Facts Product Portfolio Brand NPD **Recent Developments** Tyrrell & Company Key Facts Product Portfolio **Recent Developments** Tindal Wine Merchants LTD. Key Facts Product Portfolio Brand NPD Recent Developments Irish Distillers (Pernod Ricard) Key Facts Product Portfolio Brand NPD **Recent Developments**

The Consumer – What You Need to Know

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1377.95 | €1276.55

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

White wine most preferred type among Irish consumers

Grape type and special offers motivate consumers to buy wine

Descriptive terms highly important for targeting wine to Irish women

The Consumer – Types of Wine Used

White wine most preferred type among Irish consumers

Figure 26: Types of wine consumers have drunk in home or out of home in the last six months, Ni and RoI, April 2016

Trend to night in helping to boost wine usage at home

Wine sees strong usage among affluent consumers

Figure 27: Where consumers have bought still white wine in the last six months, by social class, NI and RoI, November 2016

Men show stronger in-home usage of wine

Figure 28: Consumption of still red wine and rosé wine in the last six months, by gender, NI and RoI, November 2016

Sparkling wines see stronger usage with married couples

Figure 29: Consumption of Champagne/ Prosecco/ Cava in the last six months, by marital status, NI and RoI, November 2016

The Consumer – Important Factors When Choosing Wine

Grape type important to RoI, special offers to NI

Figure 30: Attributes (excluding price) which would see consumers choose one product over another when buying wine, NI and RoI, November 2016

Type of grape key consideration for the over-45s

Figure 31: Consumers who consider type of grape (eg Chardonnay, Sauvignon Blanc) important when choosing one wine over another, by age, NI and RoI, November 2016

Special offers appeal more to NI consumers

Figure 32: Consumers who consider being on special offer important when choosing one wine over another, by social class, NI and RoI, November 2016

Country of origin more important to men

Figure 33: Consumers who consider country of origin important when choosing one wine over another, by gender, NI and RoI, November 2016

Figure 34: Number of cases of table wine sold, by selected country of origin, RoI, 2008-15

The Consumer – Attitudes towards Wine

On-pack information appeals to Irish drinkers

Figure 35: Agreement with statements relating to wine, NI and RoI, November 2016

Information key to encourage greater wine usage among women

Figure 36: Agreement with the statement 'Terms used to describe the flavour of wine are helpful (eg on-pack, on menu etc)', by gender, NI and RoI, November 2016

Half of consumers prefer to stick to wines they know

Figure 37: Agreement with the statement 'I generally stick to the same variety of wine', by age, NI and RoI, November 2016

Screwcaps find favour with less affluent consumers

Figure 38: Agreement with the statement 'I prefer wines with screwcaps to wines with corks', by social class, NI and RoI, November 2016

Own-label and discounter wine seen as improving

Figure 39: Agreement with the statement 'I find the quality of own-label/ discounter wine has improved in the last 12 months (eg Tesco Finest)', NI and RoI, November 2016 Figure 40: Alcohol products that consumers would typically buy, own-label, NI and RoI, November 2016

Appendix – Data Sources, Abbreviations and Supporting Information

Definition

Data sources

BUY THIS REPORT NOW

MINTEL

Wine - Ireland - February 2017

Report Price: £1095.00 | \$1377.95 | €1276.55

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

Generational cohorts Abbreviations **Appendix – The Consumer** NI Toluna data Figure 41: Where consumers have bought still white wine in the last six months, by demographics, NI, November 2016 Figure 42: Where consumers have bought still red wine in the last six months, by demographics, NI, November 2016 Figure 43: Where consumers have bought still rosé wine in the last six months, by demographics, NI, November 2016 Figure 44: Where consumers have bought Champagne/ Prosecco/ Cava in the last six months, by demographics, NI, November 2016 Figure 45: Where consumers have bought other sparkling wine (eg Moscato, Crémant) in the last six months, by demographics, NI, November 2016 Figure 46: Where consumers have bought any fortified wine (eg port/sherry/vermouth) in the last six months, by demographics, NI, November 2016 Figure 47: Where consumers have bought any dessert wine (eg Sauternes) in the last six months, by demographics, NI, November 2016 Figure 48: Where consumers have bought any wine in a box/pouch (eg bag in box) in the last six months, by demographics, NI, November 2016 Figure 49: Where consumers have bought any lower/non-alcohol still wine (eg 5.5 ABV or lower) in the last six months, by demographics, by demographics, NI, November 2016 demographics, NI, November 2016 Figure 50: Where consumers have bought any fruit-flavoured wine (eg apple, strawberry) in the last six months, by demographics, NI, November 2016 Figure 51: Where consumers have bought wine on draught in the last six months, by demographics, NI, November 2016 Figure 52: Where consumers have bought any reduced sugar/ low-calorie wines (eg Skinny Prosecco), by demographics, NI, November 2016 Figure 53: Attributes (excluding price) which would see consumers choose one product over another when buying wine, by demographics, NI, November 2016 Figure 54: Attributes (excluding price) which would see consumers choose one product over another when buying wine, by demographics, NI, November 2016 (continued) Figure 55: Attributes (excluding price) which would see consumers choose one product over another when buying wine, by demographics, NI, November 2016 (continued) Figure 56: Agreement with the statement 'I find the quality of own-label/ discounter wine has improved in the last 12 months (eg Tesco Finest)', by demographics, NI, November 2016 Figure 57: Agreement with the statement 'Concerns about not finishing the bottle put me off drinking wine at home', by demographics, NI, November 2016 Figure 58: Agreement with the statement 'Terms used to describe the flavour of wine are helpful (eg on-pack, on menu etc)', by demographics, NI, November 2016 Figure 59: Agreement with the statement 'I would drink wine at home with a meal more often if there was a wider range of smaller-sized bottles (eq half size)', by demographics, NI, November 2016 Figure 60: Agreement with the statement 'I have bought wine from an online retailer in the last 3 months', by demographics, NI, November 2016 Figure 61: Agreement with the statement 'I would like to be able to order wine with/without a meal via delivery services (eg Deliveroo)', by demographics, NI, November 2016 Figure 62: Agreement with the statement 'I would be interested in wine-based drinks with unusual fruity flavours (eg pear drops)', by Figure 63: Agreement with the statement 'I would like a wider range of wines sold in smaller bottle sizes (eg single serve) in pubs/bars restaurants', by demographics, NI, November 2016 Figure 64: Agreement with the statement 'Wine on tap in a pub/bar/restaurant would appeal to me', by demographics, NI, November 2016 Figure 65: Agreement with the statement 'I prefer wines with screwcaps to wines with corks', by demographics, NI, November 2016 Figure 66: Agreement with the statement 'I know enough about wine to make an informed decision when trying different types', by demographics, NI, November 2016 Figure 67: Agreement with the statement 'I generally stick to the same variety of wine', by demographics, NI, November 2016 RoI Toluna data Figure 68: Where consumers have bought still white wine in the last six months, by demographics, RoI, November 2016 Figure 69: Where consumers have bought still red wine in the last six months, by demographics, RoI, November 2016 Figure 70: Where consumers have bought still rosé wine in the last six months, by demographics, RoI, November 2016 Figure 71: Where consumers have bought Champagne/ Prosecco/ Cava in the last six months, by demographics, RoI, November 2016 November 2016 Figure 73: Where consumers have bought other sparkling wine (eg Moscato, Crémant) in the last six months, by demographics, RoI, November 2016 November 2016 Figure 74: Where consumers have bought any dessert wine (eg Sauternes) in the last six months, by demographics, RoI, November 2016

BUY THIS REPORT NOW



Report Price: £1095.00 | \$1377.95 | €1276.55

Wine - Ireland - February 2017

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

Figure 75: Where consumers have bought any wine in a box/pouch (eg bag in box) in the last six months, by demographics, RoI, November 2016 Figure 76: Where consumers have bought any lower/non-alcohol still wine (eg 5.5 ABV or lower) in the last six months, by demographics, RoI, November 2016 Figure 77: Where consumers have bought any fruit-flavoured wine (eg apple, strawberry) in the last six months, by demographics, RoI. November 2016 Figure 78: Where consumers have bought wine on draught in the last six months, by demographics, RoI, November 2016 Figure 79: Where consumers have bought any reduced sugar/ low-calorie wines (eg Skinny Prosecco), by demographics, RoI, November 2016 Figure 80: Attributes (excluding price) which would see consumers choose one product over another when buying wine, by demographics, RoI, November 2016 Figure 81: Attributes (excluding price) which would see consumers choose one product over another when buying wine, by demographics, RoI, November 2016 (continued) Figure 82: Attributes (excluding price) which would see consumers choose one product over another when buying wine, by demographics, RoI, November 2016 (continued) Figure 83: Agreement with the statement 'I find the quality of own-label/ discounter wine has improved in the last 12 months (eg Tesco Finest)', by demographics, RoI, November 2016 Figure 84: Agreement with the statement 'Concerns about not finishing the bottle put me off drinking wine at home', by demographics, RoI, November 2016 RoI, November 2016 Figure 85: Agreement with the statement 'Terms used to describe the flavour of wine are helpful (eg on-pack, on menu etc)', by demographics, RoI, November 2016 Figure 86: Agreement with the statement 'I would drink wine at home with a meal more often if there was a wider range of smaller-sized bottles (eg half size)', by demographics, RoI, November 2016 Figure 87: Agreement with the statement 'I have bought wine from an online retailer in the last 3 months', by demographics, RoI, November 2016 Figure 88: Agreement with the statement 'I would like to be able to order wine with/without a meal via delivery services (eg Deliveroo)', by demographics, RoI, November 2016 Figure 89: Agreement with the statement 'I would be interested in wine-based drinks with unusual fruity flavours (eg pear drops)', by demographics, RoI, November 2016 Figure 90: Agreement with the statement 'I would like a wider range of wines sold in smaller bottle sizes (eg cincle corre) in publicher Figure 90: Agreement with the statement 'I would like a wider range of wines sold in smaller bottle sizes (eg single serve) in pubs/bars restaurants', by demographics, RoI, November 2016 Figure 91: Agreement with the statement 'Wine on tap in a pub/bar/restaurant would appeal to me', by demographics, RoI, November 2016 Figure 92: Agreement with the statement 'I know enough about wine to make an informed decision when trying different types', by demographics, RoI, November 2016 Figure 93: Agreement with the statement 'I prefer wines with screwcaps to wines with corks', by demographics, RoI, November 2016 Figure 94: Agreement with the statement 'I generally stick to the same variety of wine', by demographics, RoI, November 2016

BUY THIS REPORT NOW