



ALL ABOUT WINE

Flavour trends for wine-based drinks

Content

- Trend insights
- Market insights: Wine-based drinks
- Consumer insights
- Market insights: Product focus
- **ALL ABOUT WINE –
Flavour trends for wine-based drinks**
- Contact



A photograph of two glasses filled with an orange-colored cocktail, ice cubes, and a slice of orange. A green and white striped straw is in the glass on the right. The glasses are on a wooden surface.

Trend insight: Sensory & indulgence in alcoholic beverages

- Consumers seek out quality, variety as well as immersive “consumption experiences” and are often willing to pay a premium for this.
- The need for enjoyment and uniqueness fuels further innovation in **craft and hybrid alcohol**.
- Alcoholic beverages are intrinsically about the **sensory experience of consumption** and the associated indulgence.
- As much as other factors, they have become more impactful on consumer decision-making over alcohol and are changing drinking occasions.
- The experimental element remains dominant in deciding what drinks consumers choose or prefer.



Trend insight: “Better-for-you” and healthier alcohol options on the rise

Natural claims are core to consumers' concepts of healthiness.

- Consumers meaning of healthy = natural.¹
- Natural claims are increasing within NPD.
- They respond to consumers' demand for “authentic” ingredients and an associated transparency over how products are made.

“Better-for-you” alcohol needs to offer **interconnected benefits** to establish credibility as a healthier option.

- Producers are increasingly highlighting the use of natural ingredients in their products.
- Transparency on ingredients and sourcing will play a major role.
- Natural ingredients can have added health appeal when combined with other “**healthy**” **attributes** (e.g. low sugar, low calorie) that suggest a positive nutritional contribution.

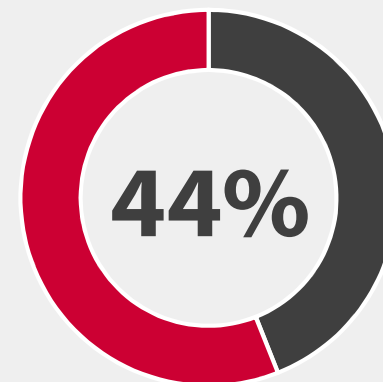
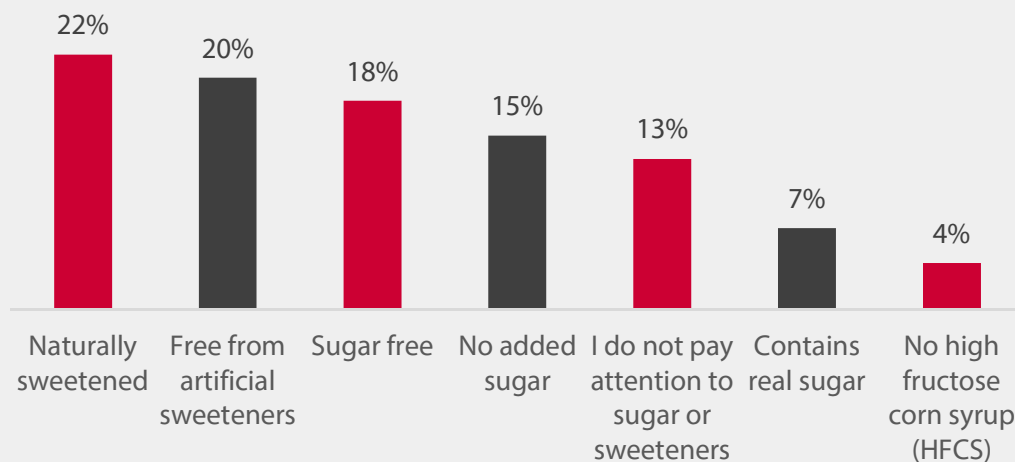
Trend insight: “Better-for-you” and healthier alcohol options on the rise

The demand for low sugar or alternative forms of natural sweeteners is shaping alcoholic drink formulations.

- More critical attitudes and avoidance behaviour towards sugar content in food and drink products are now migrating into alcoholic beverages.
- Sugar has become universally seen as negative in excess or when added (rather than naturally present in a product).
- This development puts pressure on producers of pre-mixed drinks, as these are often rich in sugar.



Global: „Which of the following claims is the most appealing when choosing food/drinks?“*



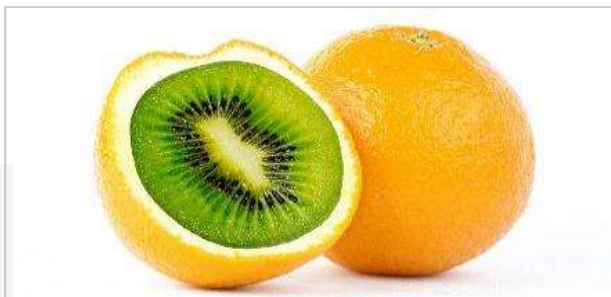
of global consumers state that „low in sugar“ means „healthy“ to them.²



Trend insight: Ethical and sustainable alcohol as a focus topic

- A strong relationship exists already between wine and **sustainable and ethical considerations**.
- This narrative grows in importance, particularly alongside the Health & Wellness megatrend as part of a holistic wellness concept.
- Wine has certain associations with health already, but opportunities exist to maximize that. **Lower alcohol variants** and the emergence of **fully vegan** wines are attractive to growing numbers of consumers globally – beyond dedicated vegans alone.
- Wine lends itself to veganism and **holistic approaches** can extend to all aspects including labelling materials and processes.

Global opportunities



Hybrid beverages

- Look for opportunities to "cross-breed" alcohol genres for surprising, but appealing results
- Explore co-branded opportunities with products outside of alcohol (e.g. food, non-alcoholic drinks)
- Tap into the localism trend as a guide in developing hybrid opportunities – play on local favourites to focus on innovation



"Drink-stagramming"

- See the alcoholic drink category as a visual & experiential consumption experience
- Facilitate digital sharing opportunities through technological activations in packaging or at point of sale on-trade
- Monitor and seek to influence/build opportunities for social media buzz around alcohol brands & products



Extreme craft

- Consumers are no longer satisfied by the "main-streaming" of craft alcohol
- Explore unusual and maverick ingredient choices to attract experimental and adventurous consumers

Market insights: Outlook // Total volume

Wine-based RTD Europe ³ Market sizes Total Volume Million Litres							
Geography	2018	2019	2020	2021	2022	2023	2018-2023 %
Spain	82.971	83.900	85.032	86.254	87.533	88.846	7.1% (CAGR: 1.4%)
Germany	79.938	80.753	81.313	81.622	81.655	81.452	1.9% (CAGR: 0.4%)
Russia	18.113	18.244	18.348	18.433	18.468	18.489	2.1% (CAGR: 0.4%)
Italy	15.544	15.914	16.265	16.613	16.928	17.209	10.7% (CAGR: 2.1%)
France	8.695	8.663	8.627	8.628	8.644	8.670	-0.3% (CAGR: -0.1%)
Netherlands	4.756	5.223	5.635	5.962	6.224	6.436	35.3% (CAGR: 6.2%)
Czech Republic	2.540	2.568	2.580	2.588	2.593	2.595	2.2% (CAGR: 0.4%)
United Kingdom	1.391	1.394	1.397	1.398	1.398	1.398	0.5% (CAGR: 0.1%)
Switzerland	1.020	1.030	1.038	1.044	1.050	1.056	3.5% (CAGR: 0.7%)



³ No data available for Ukraine, Poland and Turkey.

Market insights: Outlook // Total value RSP

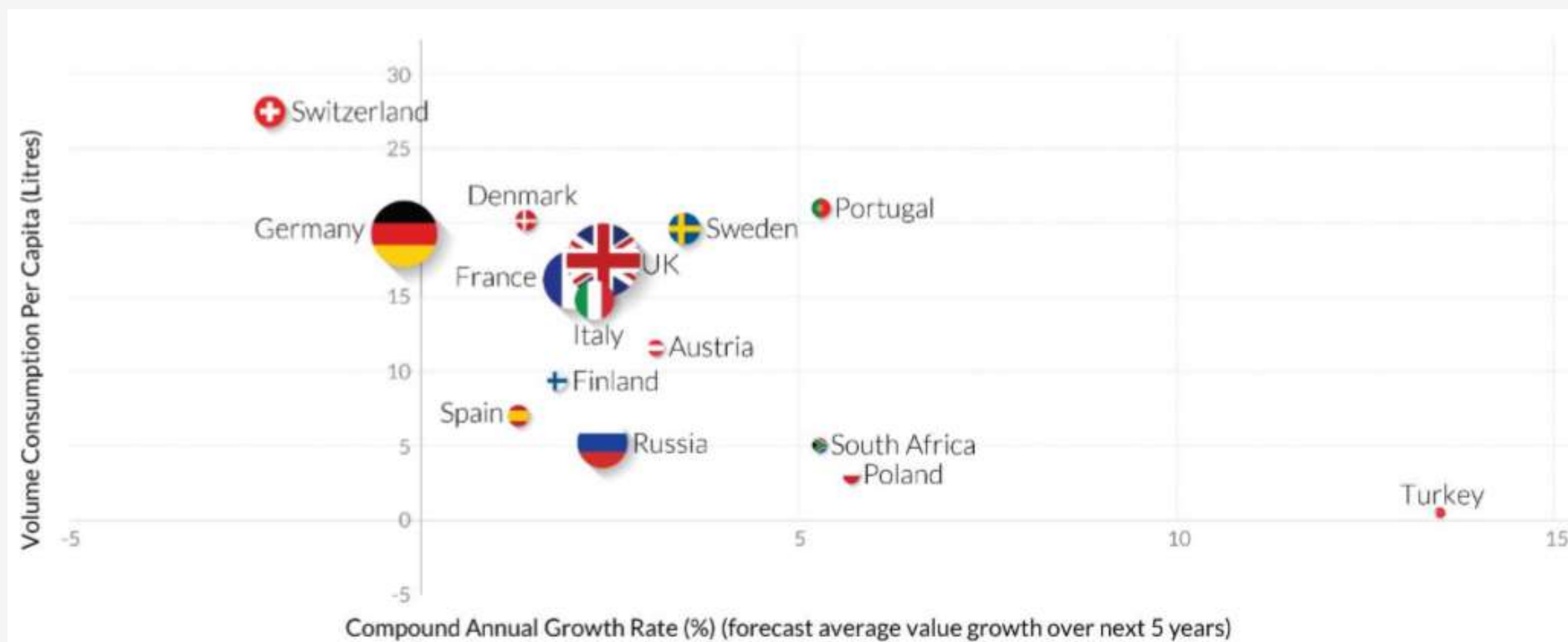


Wine-based RTD Europe⁴ | Market sizes | Total Value RSP | Million Euro

Geography	2018	2019	2020	2021	2022	2023	2018-2023 %
Germany	324	336	348	359	369	379	17.0% (CAGR: 3.8%)
Italy	167	174	181	189	196	204	21.8% (CAGR: 4%)
Spain	84	86	89	92	96	100	18.4% (CAGR: 3.4%)
Russia	45	48	49	51	52	54	18.8% (CAGR: 3.5%)
France	28	28	28	29	29	30	7.3% (CAGR: 1.4%)
Netherlands	19	21	23	25	26	27	43.5% (CAGR: 7.3%)
Switzerland	14	14	15	15	16	16	19.4% (CAGR: 3.6%)
United Kingdom	12	13	13	14	14	14	19.4% (CAGR: 3.6%)
Czech Republic	11	12	12	13	13	13	20.4% (CAGR: 3.8%)

⁴ No data available for Ukraine, Poland and Turkey.

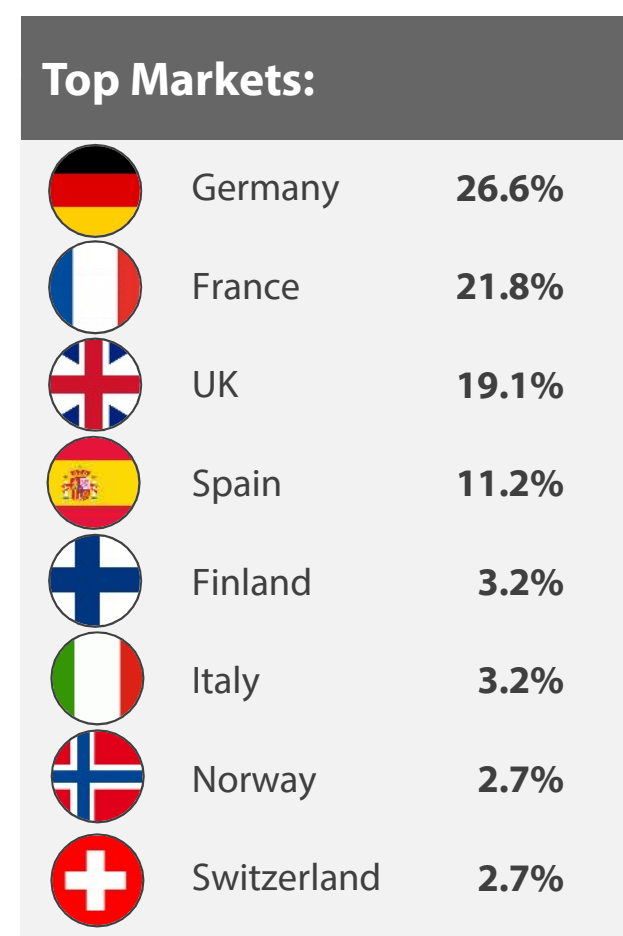
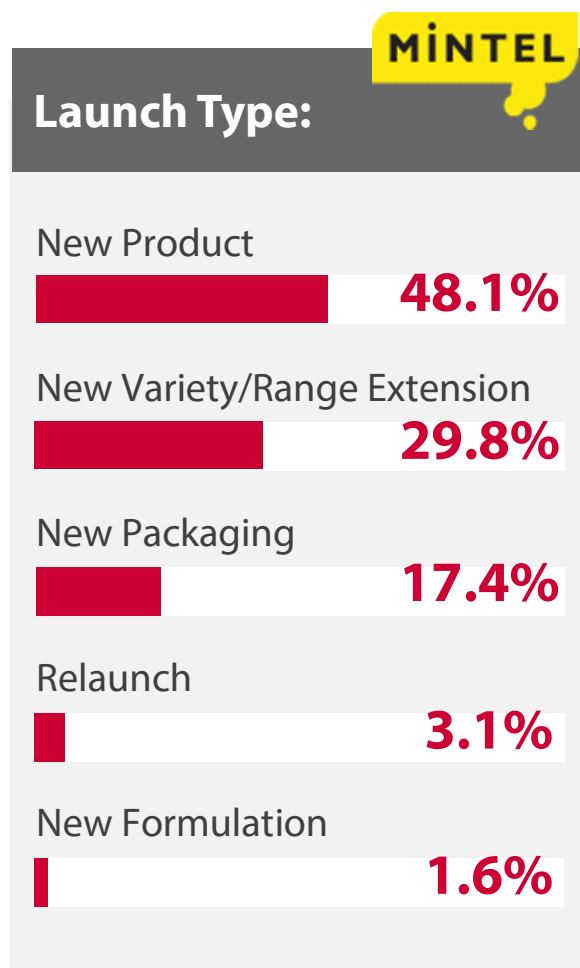
Market insights: EMEA retail market overview of wine and sparkling wine, 2019



Base: bubble size is based on market volume (litres); CAGR is based on market growth in value over the last five years in local currency.

Market insights: Launches & top markets

NPD activity on flavoured alcoholic beverages with wine as an ingredient,
01/2016 - 11/2019, Europe



Market insights: Popular flavour variants

NPD activity on flavoured alcoholic beverages with wine as an ingredient,
01/2016 - 11/2019, Europe

Popular flavour variants:	
	Grapefruit
	Lemon
	Peach
	Mojito
	Orange
	Cassis
	Raspberry
	Strawberry
	Pear
	Red Fruits



Top growing flavour variants (2018 compared to 2019):

	Orange
	Passionfruit
	Peach
	Lemon
	Strawberry
	Cherry
	Raspberry & Strawberry
	Blackberry

Market insights: Leading claims

NPD activity on flavoured alcoholic beverages with wine as an ingredient,
01/2016 - 11/2019, Europe

Leading claims:		Mintel
Seasonal	15.1%	
Ethical - Environmentally Friendly Package	13.6%	
Ethical - Recycling	12.8%	
Organic	10.9%	
Ease of Use	6.6%	
Premium	5.4%	
No Additives/Preservatives	4.7%	
Social Media	4.3%	
Vegan	3.9%	
GMO Free	3.5%	



Consumer insights: Wine consumption in Europe



Red and White Wine

86%

of adults in Spain have drunk red wine, and 70% of adults in Italy have drunk white wine in the last three months



Sparkling Wine

66%

of Italian adults have drunk sparkling wine (e.g. Prosecco, Champagne) in the last three months



Pre-Mix

40%

of adults in Spain have drunk a pre-mix spirit/wine or cocktails

Base: Spain: 992 internet users aged 18+, Italy: 714 internet users aged 18+ who have drunk wine in the last 3 months

Market insights: Product focus



Italy, Canei

Canei Frizzante Originale Bianco Fresco (Refreshing White Frizzante Wine Drink) is described as a flavoured wine-based drink with elderflower, has been made with natural ingredients and sparkled by means of the natural fermentation process of the Canei grape blend. It retails in a 750ml bottle. It has an ABV of 7%.



France, JP Chenet

J.P. Chenet Fashion Strawberry Raspberry Flavoured Cocktail is described as a flavoured carbonated wine-based drink, and as a fresh fruity explosion. It retails in a 750ml bottle. It has an ABV of 10%

France, Fruits and Wine

Fruits and Wine by Moncigale Rosé Pamplemousse (Rosé Wine & Grapefruit Flavoured Drink) has been repackaged. The product is a mix between the delicacy of fruit and the freshness of rosé wine. It features rich and lightly sour notes, is said to go well with aperitifs, and retails in a pack of six 250ml bottles. It has an ABV of 7%.



Market insights: Product focus

UK, Zèra

Zèra Organic Alcohol-Free Chardonnay is pasteurized, suitable for vegans, halal-certified and is described as a sparkling beverage based on organic Chardonnay grape juice. It is non-fermented and retails in a 750ml bottle.



France, Gratien & Meyer

Gratien & Meyer Festillant Mojito Sans Alcool (Alcohol-Free Mojito) is a sparkling drink that is made with alcohol-free wine, and retails in a 750ml bottle.



Germany, Basic Bio Supermärkte

Basic Lilly Pink Aromatisierter Weinhaltiger Bio-Cocktail (Lilly Pink Cocktail) is an aromatic organic rosé wine-based cocktail. The organic product is suitable for vegans and retails in a 330ml pack featuring the EU Green leaf and Bio logos. It has an ABV of 6%.



Germany, Katlenburger

Katlenburger Cocktail To Go Bitter-Fruchtweincocktail (The Bitter Cocktail with Orange, Pomegranate and Vermouth) is a carbonated drink made of fresh fruit wine featuring orange, pomegranate and vermouth. The product is ready to drink and should be enjoyed well chilled, and retails in a 330ml recyclable pack featuring the Facebook and Instagram logos. It has an ABV of 7%.

Product focus: Single serve and smaller packs

- Smaller packaging sizes can encourage consumers to drink wine-based drinks on more occasions at home.
- The smaller formats will boost rather than reduce the usage.
- At the same time, consumers are moderating the amount of wine due to smaller sizes (187-250ml) and are alleviating wine waste.



36%

of adults in the UK
who drink wine say
smaller bottles would
encourage them to
drink wine more often
at home

Product focus: Adding edible sparkles & flavour to wine-based drinks

- As consumers are looking for **new, experimental and individual product properties**, UK based producers like “Pop a Ball”, “Unicorn Shimmer Co.” and “Sparkle Drops” introduce a new way to **add extra shimmer** to wine-based drinks with edible sparkles.
- These products aim to make the drinking experience even more **festive and fancy** and serve as a **fun and distinctive point of differentiation**. When added to a drink, some products also enhance the Prosecco taste with **flavours** like raspberry or strawberry.



ALL ABOUT WINE

Flavour trends for wine-based drinks

The wine-based drinks category is driven by the constant evolution in consumer demand for unique and fruity product options – creating a strong need for new product developments based on sophisticated taste and high-quality, natural ingredients.

Get in touch with taste. Discover Bell's range of natural flavours for wine-based drinks, delivering inspirations for sophisticated and delicious range extensions.





1. Grapefruit

0411395

Grapefruit Flavour

Dosage:

1,0 : 1000

Ethanol %Vol:

5,0

Declaration:

Natural Flavouring





2. Blood Orange

0550049

Blood Orange Flavour

Dosage:

0,8 : 1000

Ethanol %Vol:

5,0

Declaration:

Natural Flavouring



3. Strawberry



0550123

Strawberry Flavour

Dosage:

2,0 : 1000

Ethanol %Vol:

5,0

Declaration:

Natural Flavouring



4. Blueberry

0411952
0418859

Blueberry Flavour
Vanilla Flavour

Dosage Blueberry: 1,1 : 1000

Dosage Vanilla: 0,7 : 1000

Ethanol %Vol: 5,0

Declaration: Natural Flavouring



5. Elderflower

0550191

Elderflower Flavour

Dosage:

1,5 : 1000

Ethanol %Vol:

5,0

Declaration:

Natural Flavouring



6. Elderflower Ice Melon

A new and exciting taste experience with a cooling mouthfeel sensation.

0550191

Elderflower Flavour

0528384

Icemint Flavour

0550014

Melon Flavour

Dosage Elderflower: 2,0 : 1000

Dosage Icemint: 0,1 : 1000

Dosage Melon: 1,0 : 1000

Ethanol %Vol: 5,0

Declaration: Natural Flavouring

Contact

Andrea Panajotowa

Marketing Specialist Beverages

Tel.: +49.341.9451.1061

E-mail: a.panajotowa@bell-europe.com

Bell Flavors & Fragrances

Schimmelstrasse 1

04205 Leipzig, Germany

www.bell-europe.com

