

'ORGANIC WINES IN THE NETHERLANDS: TRENDS, EXPECTATIONS AND DEVELOPMENTS'

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Millésime**BIO**



MONDIAL
DU VIN BIOLOGIQUE
WORLD ORGANIC WINE FAIR



METHODOLOGY

This report shows the trends, expectations and developments in the area of organic wines on the Dutch market. In order to be able to assess the image of organic wines in the Netherlands, 409 wine consumers participated in an online survey last summer. Questions ranged from the average amount of money spent to the motivation for purchasing organic wines. In addition, qualitative research was carried out among eight renowned Dutch professionals from the world of wine. They were asked how they believe the consumer perceives organic wines.

Pitch PR, a Dutch wine and food marketing agency, carried out this trend research in association with Sudvinbio, the Occitanie professional association of organic wines, and organizer of Millésime Bio. In a short introduction, we look at what is already published about organic wines in the Netherlands. Then quantitative research, in association with WINELIFE Magazine, is carried out among Dutch wine consumers. This means that the questionnaires are completed by people with an above-average interest in wine, not the average Dutch wine consumer. The online survey is disseminated via LinkedIn, Facebook and various lifestyle blogs. With all analyses, the question concerns the opinion of the consumer in retail, not in the out of home industry.

At the end of this report, all gathered information is merged into a correlated conclusion.



"ORGANIC WINES IN THE NETHERLANDS: TRENDS, EXPECTATIONS AND DEVELOPMENTS"

MILLESIME BIO

This year the global event for organic wine, Millésime Bio, takes place in France's leading organic production area, the Languedoc-Roussillon (Occitanie Region). From 29th to 31st of January 2018 Parc des Expositions in Montpellier will be dominated by the best organic wines from across the whole world. Over three days, nearly 1000 exhibitors from all wine producing countries and regions get to meet many wine trade professionals from all over the globe. Millésime Bio is the leading global marketplace for organic wine and celebrates its 25th anniversary in Montpellier. It is the largest international platform for organic wine. Millésime Bio is organised by Sudvinbio, the trade organisation of organic wine producers from Occitanie. This region is France's leading organic farming region and the largest producer of organic wines in the country, with 25.142 ha of organic vineyard.

For more information about the fair check the website: www.millesime-bio.com



WHAT MAKES A WINE ORGANIC?

The European organic winemaking regulation (CE) 203/2012 was adopted in February 2012, and became effective on the 1st of August, 2012. This regulation covers organic certification of the whole production process, from vineyard to bottle. Thus, since vintage 2012, we have “organic wine” and not just “wine made from organically grown grapes”! The regulation defines a common set of principles for organic winemaking: use of organic ingredients only, limited use of oenological inputs, limited SO₂ additives, etc.

4 key points as defined within the Common Market Organisation for wine:

- Use of 100% organic agricultural ingredients only: grapes, sugar, alcohol, rectified concentrated must (RCM).
- Restriction or ban on the use of certain physical processes e.g. dealcoholisation, electrodialysis, heating >70°C, (all forbidden practices).
- Use of a limited list of additives and oenological auxiliaries, some of which must be of organic origin.
- Restrictions on total SO₂ levels in commercial wines.



The winegrower must fully respect the rules in order to apply for the “organic wine” reference and the European organic label: it is impossible to certify grapes only. The reference “wine made from organically grown grapes” can no longer be used for wine produced since the 2012 vintage.

Vineyard management with organic agriculture uses the following techniques:

- Implementation of prophylactic measures to reduce sensitivity of vines to attack by parasites, before using plant protection products.
- Use of products which are of natural origin only for fertilisation and vine protection. - Genetically modified organisms (GMO) or GMO derivatives, are strictly forbidden.
- Weed control using mechanical intervention only (tillage, mulching, hand weeding, etc.).

Source: Presskit Millésime Bio 2017.



**" 89% OF THE
WINE CONSUMERS
HAVE TRIED
ORGANIC WINE "**

QUANTITATIVE RESEARCH CONSUMERS – ONLINE SURVEY

The response of the online survey included 409 people (N=409), of which 60% were women and 40% were men. The majority came within the age range of 25 to 34 years old (32.3%). There is a possibility that participants with an above-average interest in wines have wanted to participate in the survey. All respondents were contacted via lifestyle blogs or pages on LinkedIn and Facebook which relate to food, wines and / or lifestyle (including Pitch PR).

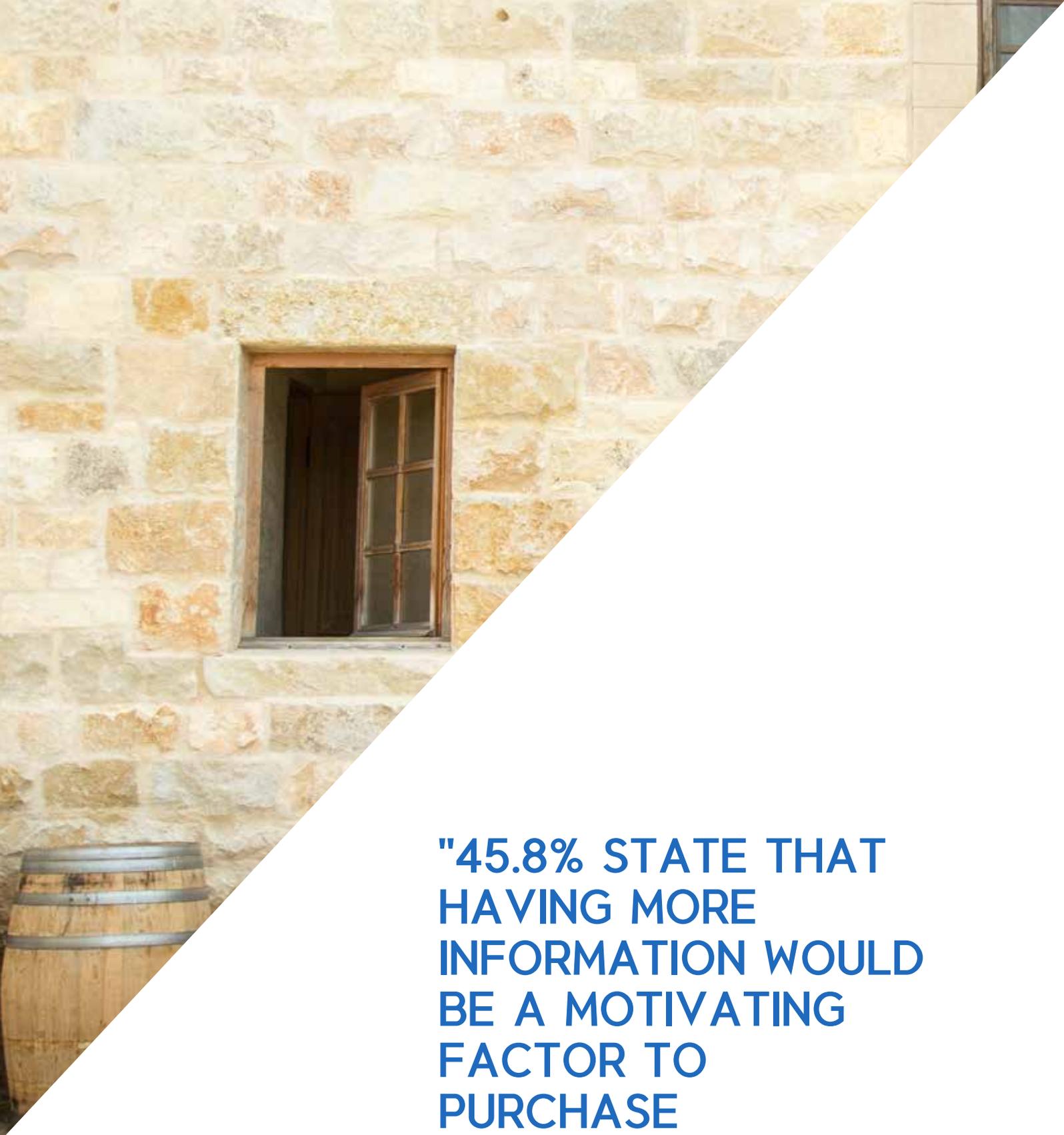
| Frequency of consumption of organic wine | | | | | |
|--|--------|-------|-----------|--------|------------|
| Gender | Always | Often | Sometimes | Rarely | Don't know |
| Man | 1,2% | 35,8% | 37,7% | 12,3% | 13,0% |
| Women | 1,7% | 21,1% | 45,3% | 20,6% | 11,3% |

89% of those who took the survey said to have tried organic wine, 5% did not know. The result shows that there are no discrepancies between men and women for this. The majority of both men and women said they have sometimes tried organic wine (men 37.7%; women 45.3%). With both groups, just over 10% does not drink organic wine or they do not know when they drink it.

| Frequency of consumption of organic wine | | | | | |
|--|--------|-------|-----------|--------|------------|
| Age | Always | Often | Sometimes | Rarely | Don't know |
| 18 – 24 | 0% | 9,4% | 32,1% | 34,0% | 24,5% |
| 25 - 34 | 0% | 31,1% | 38,6% | 20,5% | 9,8% |
| 35 – 44 | 2,9% | 21,6% | 51,0% | 11,8% | 12,7% |
| 45 – 54 | 3,4% | 36,2% | 48,3% | 6,9% | 5,2% |
| 55+ | 1,6% | 32,8% | 39,1% | 15,6% | 10,9% |

When different age categories are compared, it appears that the age category of 18 to 24 years drinks the least organic wine by comparison. Only 9.4% often drinks organic wine compared to 32.8% of people over 55. Almost a quarter of 18 to 24 year olds do not drink organic wine or is not sure if they do. This seems logical because they are the category that drinks the least wine in general.

For the question whether people purchase organic wine, the largest portion, 65%, responded positively.

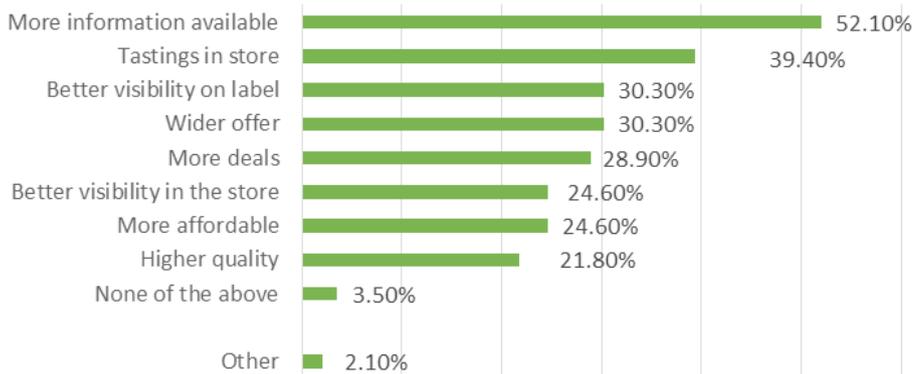


**"45.8% STATE THAT
HAVING MORE
INFORMATION WOULD
BE A MOTIVATING
FACTOR TO
PURCHASE
ORGANIC WINES"**

WHY NOT?

However, there still remains a group of 35% that states to never or rarely purchase organic wine. The most important reasons given for this are that there is a lack of information about organic wines (45.8%). It seems that organic wines are hard to find (14.8%).

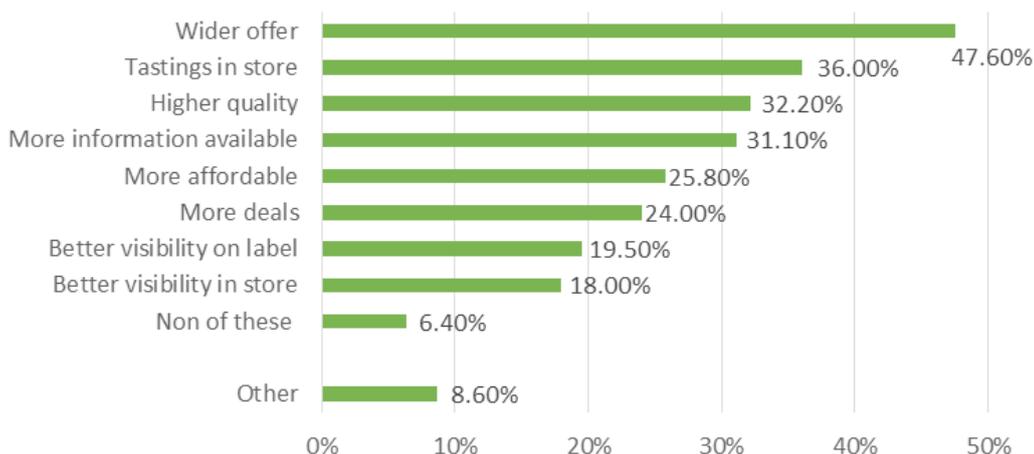
Factors that increase motivation to purchase
-- Non-buyers of organic wine --



MOTIVATE!

35% of those questioned state they never or rarely purchase organic wine, of this group 45.8% state that having access to more information would be a motivating factor to purchase organic wines. Also an affordable price (24.6%), tasting (39.4%), wider range (30.3%) and better visible organic labelling (30.3%) would be motivating factors. The people who stated that they purchase and drink organic wines (47.6%) stated they would be motivated by a wider range.

Factors that increase motivation to purchase
-- Buyers of organic wine --

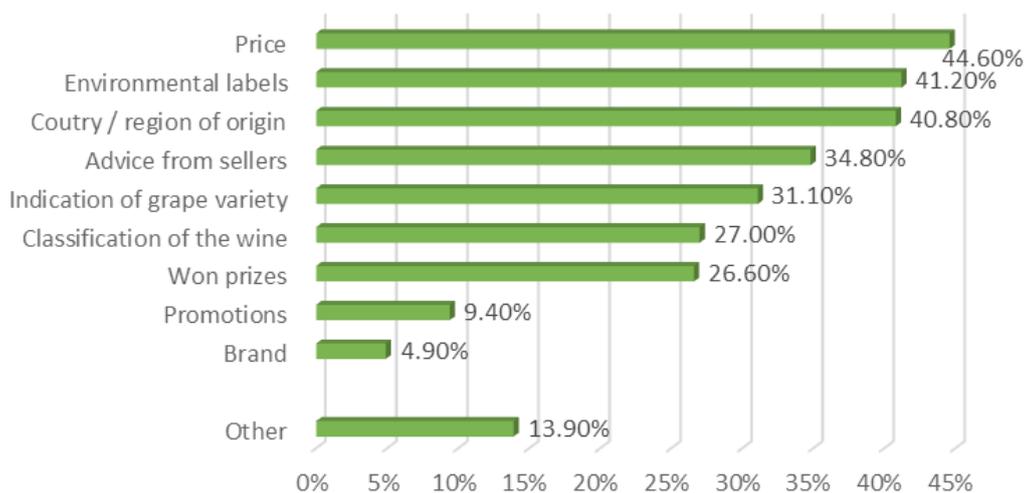




WHAT ARE THE POINTS OF ATTENTION?

The people who purchase organic wines (N=267) are asked what they look for when purchasing. The most important criteria appears to be the price (44.6%), the environmental labels on the bottle (41.2%) and the origin of the wine (40.8%). In this case the brand on the label appeared to be a less important criteria (4.9%).

Most important criteria to purchase organic wine

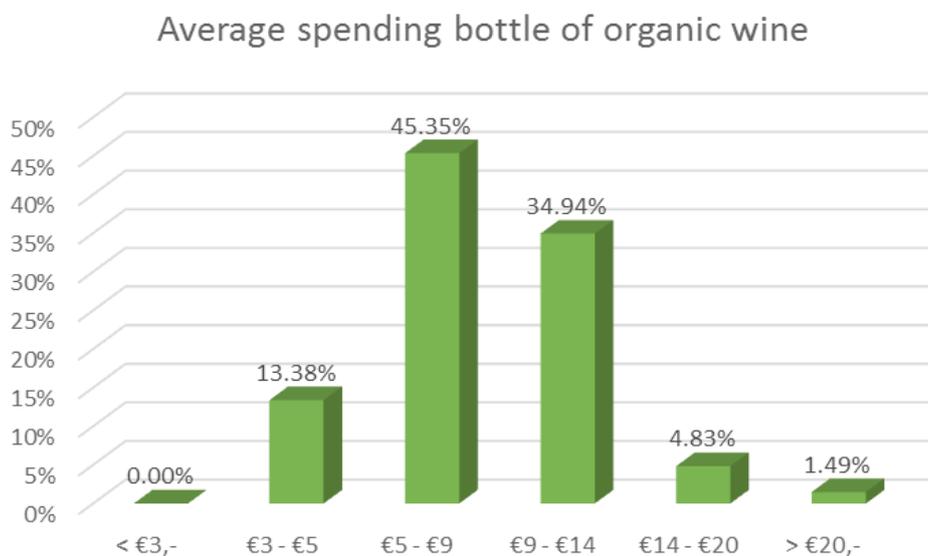


"41,2% LOOK AT ENVIRONMENTAL LABELS WHEN PURCHASING A BOTTLE OF ORGANIC WINE"

AVERAGE SPENDING

An interesting comparison can be made between the average spending for a bottle of organic wine and a bottle of regular wine. Almost half (45.35%) of those questioned claim to spend €5 to €9 on a bottle of organic wine. From earlier research, it appears that the average Dutch consumer spends €3.5 on a regular bottle of wine. Again it should be stated that people with a strong interest for wine are questioned in this research.

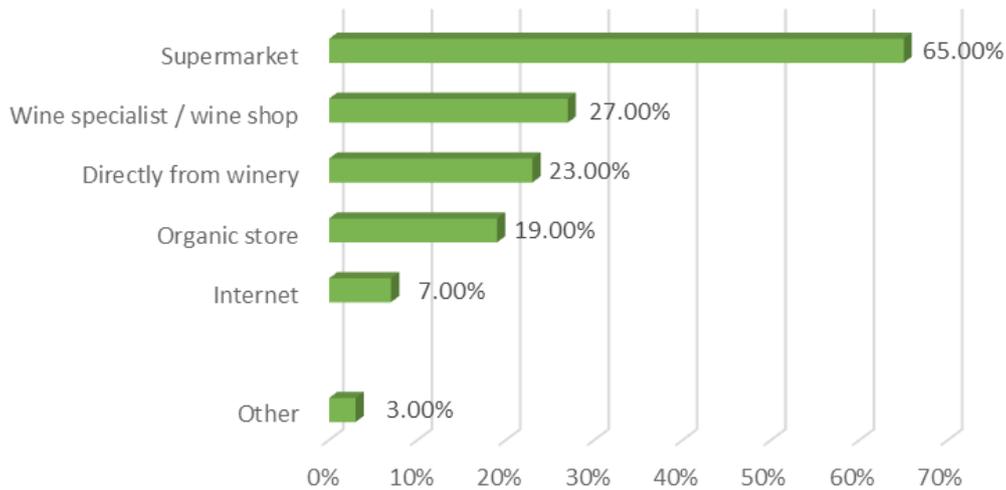
Source: Insight ABN AMRO (2015) into Nielsen research, December 2014.



SUPERMARKETS MOST POPULAR POINT OF SALE!

65% of the respondents stated that they purchased their wine at the supermarket, making it the most popular point of sale. Wine specialists come in second place with 27%.

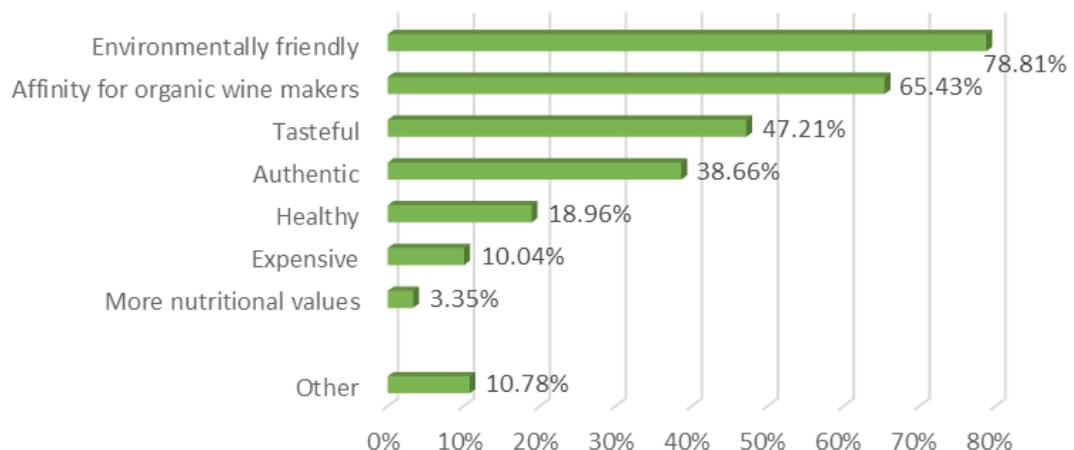
Most popular points of sale for organic wine



ENVIRONMENTALLY-FRIENDLY AS A DEFINITION?

There are many reasons underlying production and consumption of organic wine. The wine consumer is asked in the research which three terms best describe organic wines. The most popular term was 'environmentally-friendly'. 'Affinity with organic wine growers' was also popular.

Description of organic wines: according to the consumer





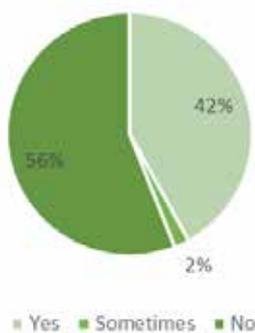
**"56% ARE READY
TO PAY MORE FOR
PRODUCTS WHICH
CONTRIBUTE TO THE
RESPECT OF THE
ENVIRONMENT"**



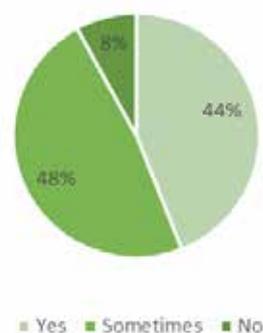
ORGANIC WINES: THE ENVIRONMENTAL ASPECTS

While in earlier questions it was stated that organic wines are perceived as being expensive, a majority of 56% is still prepared to pay more for products which contribute to the respect of the environment. 42% is sometimes prepared for this and only 8% answered negatively.

I am willing to pay more for products that contribute to the conservation of the environment
-- Buyers of organic wine --



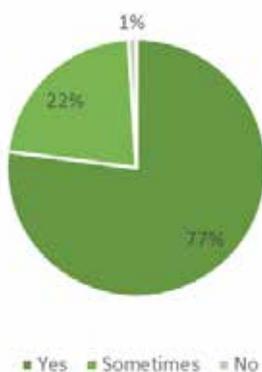
I am willing to pay more for products that contribute to the conservation of the environment
-- Non-buyers of organic wine --



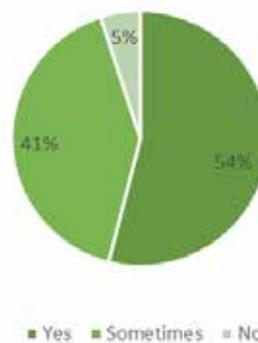


The majority, 69% of respondents, stated that they believed it was important to find the origin of the ingredients (including wines). When the difference between respondents who purchase organic wines and people who do not is analyzed, it appears that respondents who purchase organic wines find this more important (76.8%) than respondents who do not purchase organic wines (54.2%).

I think it is important to know the origin of foods
-- Buyers of organic wine --



I think it is important to know the origin of foods
-- Non-buyers of organic wine --



If a difference can be identified between men and women, it appears that this difference is less significant but still present. 65.2% of women believe it is important to know the origin of the ingredients, compared to 74.7% of men. In both cases less than 3.5% state that it is not important to discover the origins of a wine, among other things.

CONCLUSION OF SURVEY AMONG DUTCH WINE CONSUMERS

Many wine consumers already drink organic wines, but much ambiguity concerning the features and quality of these wines still exists.

The wine consumer claims to drink more organic wines where the quality of these wines is superior.

Consumers most frequent purchasing argument is the perceived environmentally-friendly aspect of organic wines, which is the most frequently quoted criteria for the most frequently appearing description for organic wines.

It appears that the wine consumer is prepared to spend more on organic wines. People state to want to contribute to the environment by paying more for a product.

35% of the wine consumers rarely buy organic wine. The main reasons for this are that they do not know enough about organic wines and because the wines are not easy to find in stores.

It also highlights that when purchasing wines there is a need for more clarity about environmental labels, organic labels and the origins of the wine. This is an important point of attention for organic wine producers, certainly because many wine consumers struggle to find organic wines.

It is of paramount importance that retailers inform wine consumers about organic wines and that the benefits of these are clearly communicated.

Furthermore it can be concluded that people want additional (unambiguous) information about organic wines. The expectation is that when additional information reaches wine consumers, they will purchase and drink more organic wines.



QUALITATIVE RESEARCH AMONG WINE PROFESSIONALS

Below is a report of the image that consumers have about biological wine according to professionals in retail, dealers and press. The report stems from 30-minute telephone interviews in which questions are asked about how wine professionals believe wine consumers perceive organic wine today.

All professionals have given permission for publication.



ALEXANDRA POUDEROYEN

WINE AND SPIRIT MANAGER JUMBO SUPERMARKETS

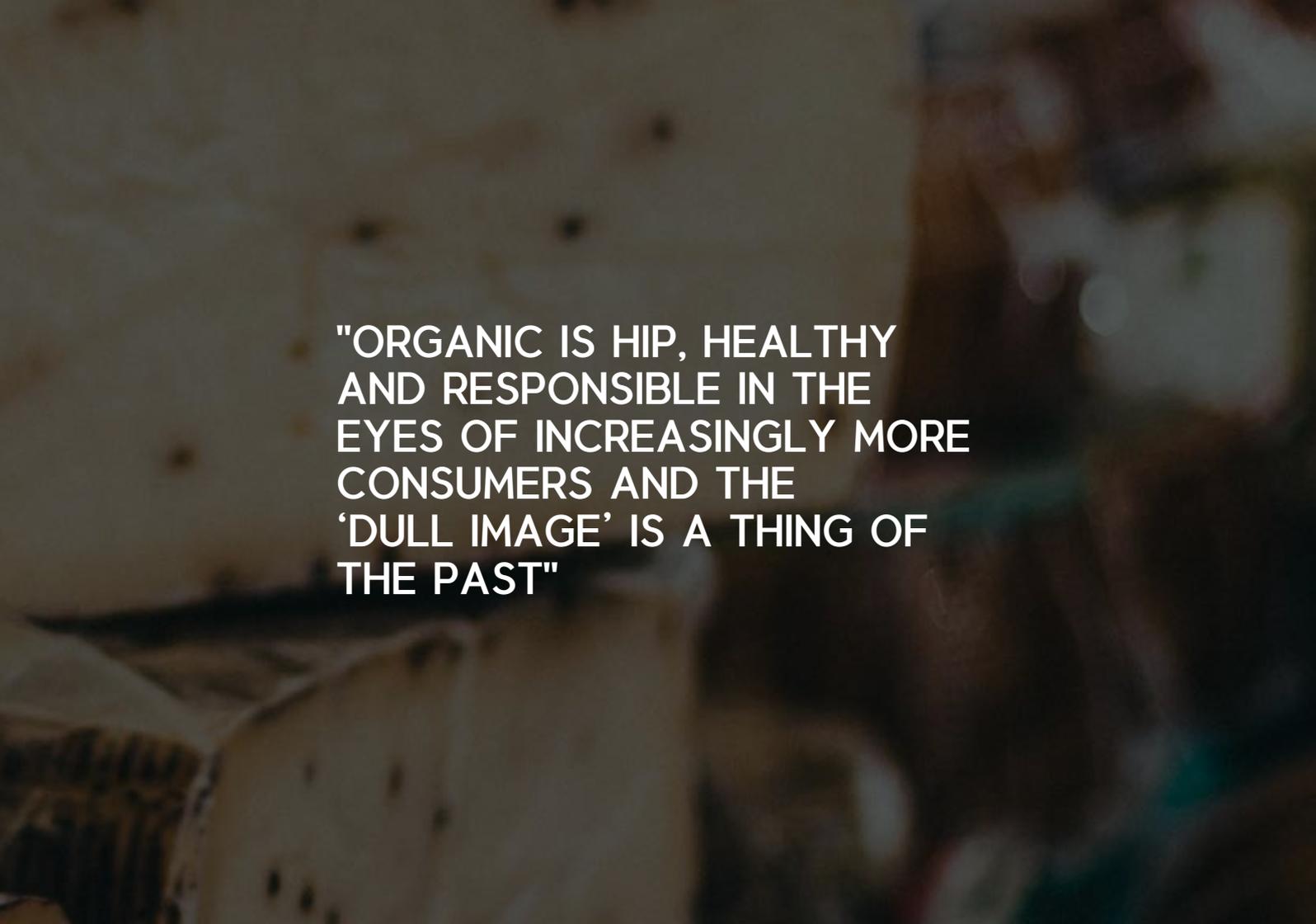
The range of organic wine has unquestionably grown in recent years. We have also added a number of organic house wines to our range.

An organic wine can be just as tasty as a non-organic wine in terms of taste and quality. When choosing a wine, taste is the most important focus and therefore organic wines must also be high quality. At our establishment, the wines are also laid out in terms of taste on the shelf, between the non-organic wines.

In my opinion, consumers have extra money to spend on organic wine, but being Jumbo superstore we want to offer the best quality at the most competitive price. It helps that increasingly more house brand wines are now available in an organic variety. Organic is hip, healthy and responsible in the eyes of increasingly more consumers and has shed its dull image.

Consumers have the idea that 'biological' is healthier. The interest in biological food is increasing and wine will follow. But what does organic wine actually mean? This is unclear for many consumers. There are many logos and indications; organic, ecological, biodynamic etc. The information concerning organic wines remains unclear. I think that this is a task for the wine sector.

When consumers stand in front of the shelf they first notice the taste, the price, the label and grape when making a choice. Then follows the country of origin, then I believe they look at whether the wine is organic or not. The consumer can be persuaded. For example, we increasingly also have an organic variant in a certain range. When there is a choice between organic and non-organic with a brand that they already know, the organic wine quickly becomes more interesting.



**"ORGANIC IS HIP, HEALTHY
AND RESPONSIBLE IN THE
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THE PAST"**

The growth of the range and the interest in organic wine will maintain. An organic trend is underway and increasingly more people are interested in craft products. Therefore this also applies to wine. People are more conscious of the wine maker when purchasing wine, who works very hard for the production of his wine. There is increasingly more appreciation for this.

The organic aspect is more obvious with vegetables and fruit than with wine. People are for instance aware that no chemical pesticides are used. For organic wine it is less clear what this actually entails. Some of the consumers believe for example that biological wine contains no sulphite. This is not true. Wine without sulphite does not exist. Only wine without added sulphite. There is far more to be explained when it concerns organic wine.

BERRY SCHAPENDONK

WINE AND SPIRIT
HEAD BUYER
SLIGRO (HORECA WHOLESALER)



I unquestionably witness a positive development in the area of organic wines in the professional food and beverage industry. However, it remains a challenge to identify what makes an organic wine actually organic.

The range of organic wines continues to grow. Within many organizations, also at ours, 'organic' is an area which will receive more attention over the coming years. In the institutional world, such as governments and hospitals for example, the focus is also increasingly turning to organic products. The expansion to more organic products is demand-driven, but also fits much better with the vision of many brands and companies.

Organic wine is not always better, despite the fact that the product has enjoyed a rise in quality in recent years. Furthermore I believe that the consumer has the illusion that biological wine is healthier. The consumer still has much to discover about organic wine and making wine in itself. We rarely actually see the use of pesticides in the mass production of wine. The negative images therefore do not have significant impact.

Organic wine production was initially picked up by small wine growers, so they gained recognition by other means. This has also expanded to increasingly large producers. More organic wine production will certainly follow. It is a matter of waiting for the day that also the majority of top houses are fully organic and allow themselves to be labelled as such.

I believe the excess of initiatives which try to appeal to organic wines to be a bad development. The consumer is overwhelmed by all different logos, the registered trademarks as it were, that appear on the market. I believe this should cease.



There is still a lack of information for the consumer about organic wines. For example, what the organic aspect actually means and what the difference is with non-organic wine. I think the message should be simple, allowing it to be clearly communicated to the consumer. Consider for example five clear differences which appear in the same way, both online, in stores, and for purchasers.

**"IT REMAINS A
CHALLENGE FOR
CONSUMERS TO IDENTIFY
WHAT MAKES AN
ORGANIC WINE"**

BIRTHE VAN MEEGEREN

WINESPECIALIST AT LIQUOR AND WINE SHOP GALL & GALL



At Gall & Gall you can find many organic wines from France and Chili. These countries enjoy favourable conditions for organic wines. People often think that choosing wines from regions less far away causes less pollution and damage to the environment. This is not true. Freight transportation from Europe causes the same pollution as boat transportation from Chili. Therefore, in terms of CO² emissions it does not really matter if you choose wine from Europe or Chili.

The demand for organic wine has grown, and therefore also the range which is offered. Organic products receive more attention.

This has become important thanks to the current health trend. Wine moves with this too. The consumer often thinks that healthier or more sustainable is better for the environment. Demand has increased due to this. I believe that this will only increase further. The range on offer will also grow. Consumers also used to say that organic wine doesn't taste as good as classic wines. Fortunately that idea is gradually changing. The quality of organic wine is also genuinely improving. This, together with the sustainable drive of the consumer, will encourage growth.

Wine remains a type of luxury product for many. Organic wine is therefore less top of mind than organic food. Sometimes people think; "wine is already a natural product".

What the consumer needs to understand about organic wine is that organic wine does not only give significance to the product. It is also important to know that the ground is not depleted and creates a superior and healthier working environment for the wine makers and their staff that work in the vineyard.



**"DEMAND FOR ORGANIC WINES
HAS INCREASED AND I BELIEVE IT
WILL INCREASE FURTHER IN THE
COMING YEARS"**

CARLIJN DRENTH

PR AND BRAND COORDINATOR AT OUD REUHLIN & BOELEN WINE IMPORTER



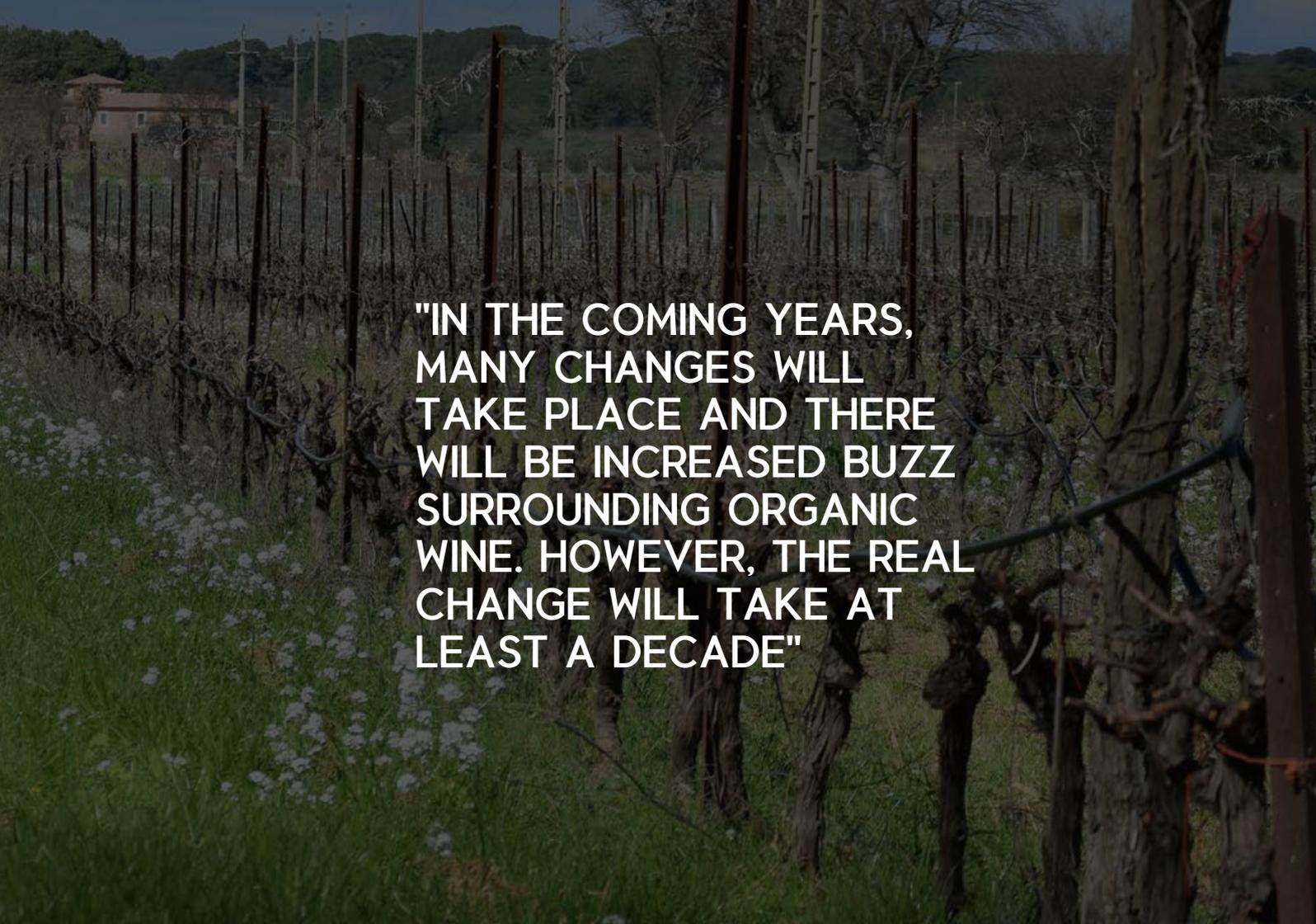
The majority of organic wines we have in the range come from producers that we have already worked with. You see that many of them are catching on and are starting to work organically too. It also concerns wines without organic classification, but made with respect for nature. I think that the consumer knows very little about organic wine. There is a certain type of hospitality entrepreneur that is specifically looking for this. Importers can respond to this demand. I wonder whether consumers also embark on this specific search. I think that consumers still largely go for the name or the brand of the wine.

The consumer does not exactly know the difference between non-organic foodstuffs with many organic products, this also counts for the area of wine.

I also think that many consumers have their doubts about the taste of organic wine and whether this is as good as non-organic wine. Naturally there are increasingly more people who do know how organic wine is made. They are happy to identify with the taste or the societal importance.

There is unquestionably a visible rise in the demand for organic wine. Also for biodynamic or fair trade wines. It does not yet concern such an increase that we actively adjust our complete assortment to.

I think there will be a moment when people across the globe become more aware of the environment and the well-being of our earth. This may take a long time, at least 10 years. First there will be more organic food, then organic wine.



**"IN THE COMING YEARS,
MANY CHANGES WILL
TAKE PLACE AND THERE
WILL BE INCREASED BUZZ
SURROUNDING ORGANIC
WINE. HOWEVER, THE REAL
CHANGE WILL TAKE AT
LEAST A DECADE"**

Organic wine is certainly not lacking in quality or taste compared to non-organic wine, even if consumers sometimes seem to believe so. Wine brands respond to this by indicating that a wine is organically certified, while this is probably not the case. I believe more people would like to know what organic wine is really about. Certain information can be found in the media about it, but it is not particularly comprehensive. An idea would be to make the information more trend-focused, just like the 'low alcohol drinks' that are currently receiving much attention. In the coming years, many changes will take place and there will be increased buzz about organic wine. However, the real change will take at least a decade.

HANS VAN DE MEEBERG

WINE AND FOOD JOURNALIST

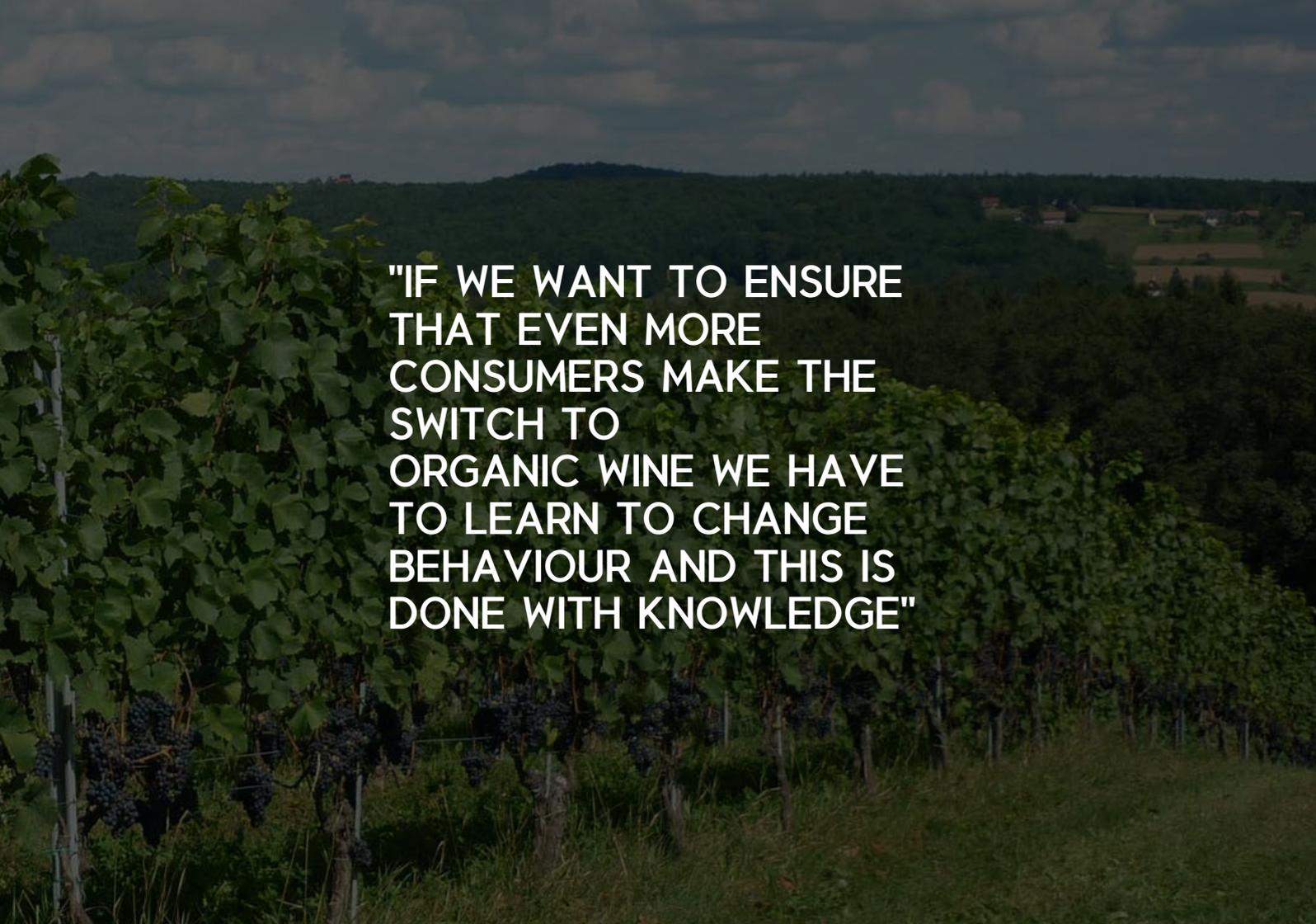


Organic wine follows the organic trend. Organic products are currently trendy. There is so much uncertainty in terms of our food at this time. Consumers consequently think more frequently; 'organic, that must be good.' In general, consumers increasingly opt for organic, and this also applies to wine. That is striking, because they actually do not know what the characteristics of organic wines are. Especially being aware of the requirements the wine must meet to be organic.

The image of organic wine has improved in recent times. Increasingly more producers are stating that they also produce organic products, which helps. Organic wine was traditionally seen as 'dull wine', perceived as being 'not quite as tasty'. That is no longer the case.

Consumers are prepared to pay more for a quality guarantee. What is noticeable is that supermarkets and importers do not explain what organic wine actually means. In the supermarket, often no one really knows the answer to the question of what it is, or sometimes you get an incorrect answer. If we want to ensure that more consumers make the switch to organic wine we have to learn to change our behaviour and this is done with knowledge. Greater accessibility would help, for instance more organic private labels available in supermarkets and wine stores.

I read very little that specifically concerns organic wine. Is it better or not? What is not good about it? What does the trademark mean? There is plenty to write about, but it is all still a bit unclear at the moment. I think supermarkets are also not aware how important the messages about organic and organic wines are. Supermarkets start making the transition to organic with vegetables and fruit and only then make the switch to other products.



**"IF WE WANT TO ENSURE
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I think more publications would lead to increased demand for organic wine. I believe many people are excited by the fact that there is less sulphite in the wine. I think a special shelf in supermarkets and stores would be helpful. Communication about organic wines can be much better!

I purchase wine myself because I like the area or the wine maker's story. For me this is the most important aspect when choosing a wine. If a regular wine and an organic wine are identical, then I would opt for the organic variety. Better for the health, better for the environment. Many benefits. As long as the taste of the wine remains good.

HAROLD HAMERMA

WINE JOURNALIST



In any case, the modern focus is on organic products in general. Bread and vegetables are becoming increasingly organic, why not also wines? Consumer desires have changed significantly in recent years and show increasingly more interest in organic products. We also make 'organic' available on a wider scale.

The popularity of organic wine is evidently increasing. Consumers believe organic tastes better. They do not know much about organic wine, the requirements it has to meet etc. There are many hallmarks, the consumer is not really aware of them.

Interest in organic wines is growing, more private label wines are becoming available as organic products. Decanter magazine once did a research into the considerations consumers have to purchase organic wine. The consumer stated to do this to assist the wine maker and because organic wine is kinder for the environment. It was not about their own interests.

It is certainly interesting to write about organic wine. I published a book about this. Organic wine is a complicated story with many different topics. For instance, what is the difference between biodynamic wines and natural wines? Is fair trade also organic? Why are there so many hallmarks?



"INFORMING CREATES DESIRE"

My book aims at making it easier for consumers to recognise an organic wine with icons to indicate whether a wine is organic or not. People genuinely wish to know this, I see that there is a need for this among consumers. However, we must, in stores and the press, still independently indicate and explain what organic wine is exactly. This remains difficult material for the average consumer who has a limited understanding of wine.

Consumers are prepared to pay more for organic wine. It is essential that the economy is strong. During a crisis, consumers are (logically) less willing to spend extra money. Price then plays a larger role. In any case, more attention is paid to the price of a product such as wine.

The consumer most frequently purchases wine from the low segment, and generally from the supermarket.

It is good that organic wine is gaining media attention. Let's keep writing. Wine is a very complicated topic for people to understand. Sometimes we have to say things 1000 times before information about wine is fully comprehended. The same principle applies to organic wine. See it this way: all sparkling wine is called champagne in the Netherlands. The average consumer is not greatly interested in the topic of 'wine'. We can create this interest. Informing creates desire. People used to think removing a screw top would affect the quality of wine.

A consumer can learn much thanks to being properly informed. In this way for instance there are still no separate shelves or own marketing communications for organic wine in the supermarket. 'Organic' is often just an added header. Organic wine can make many more gains. Not necessarily in the supermarket communication because many organic wines are more expensive than the supermarket price. Sharing the story in the media helps. And then the quality is naturally very important.

LARRY RENARDEL DE LAVALETTE

HEAD OF SALES
OKHUYSEN WINE STORE



Okhuysen Wine Store imports quality wines. We focus on wines that have been made with great respect for the natural environment. The wines have not been certified as organic by definition; 10-15% of the wines in our range have been certified as organic. Often these are the more expensive wines. The wines we sell the most, our so-called 'house wines', are not certified as organic, despite having been made with the greatest care. Some wineries consciously do not allow themselves to be certified to be able to react when required. This grants winemakers autonomy over the quality of the fruit. Other wineries and wine makers work organically, but do not actively communicate about this. Organic also has an interesting marketing aspect.

It is not a trend, more of a lifestyle. Interest in organic is growing, certainly in Okhuysen's client circles (the cheapest wine at Okhuysen costs between € 5 and € 6). There is a certain group that is very sensitive to organic wine, but I am not sure if they will spend more on this. There is a limited demand for organic wines at Okhuysen. We communicate a lot about farmers who work with great respect for the nature. They maintain the right to intervene.

Organic wine has added value for a section of the consumers. Despite this, the majority of consumers do not know what an "organic wine" entails exactly.

Organic wine is not better than non-organic wine by definition. There are people who choose organic wine to ingest as little sulphite as possible. However, sulphite residue in wine is minimal. Remarkably, the ingredient of sulphite is mandatory on a wine label, while there is a far higher level of sulphite in steak tartare or dried fruit. Also a misconception is that organic wine contains no sulphite, the substance still develops during the fermentation process.



"IT IS NOT A
TREND, BUT A
LIFESTYLE"

At a certain point, the message goes viral. Respect for nature = great quality. I still believe consumers choose for the name and fame of a wine producer. Ultimately the organic aspect remains secondary

SPIKE HUISMAN

SENIOR WINE CATEGORY MANAGER ALBERT HEIJN

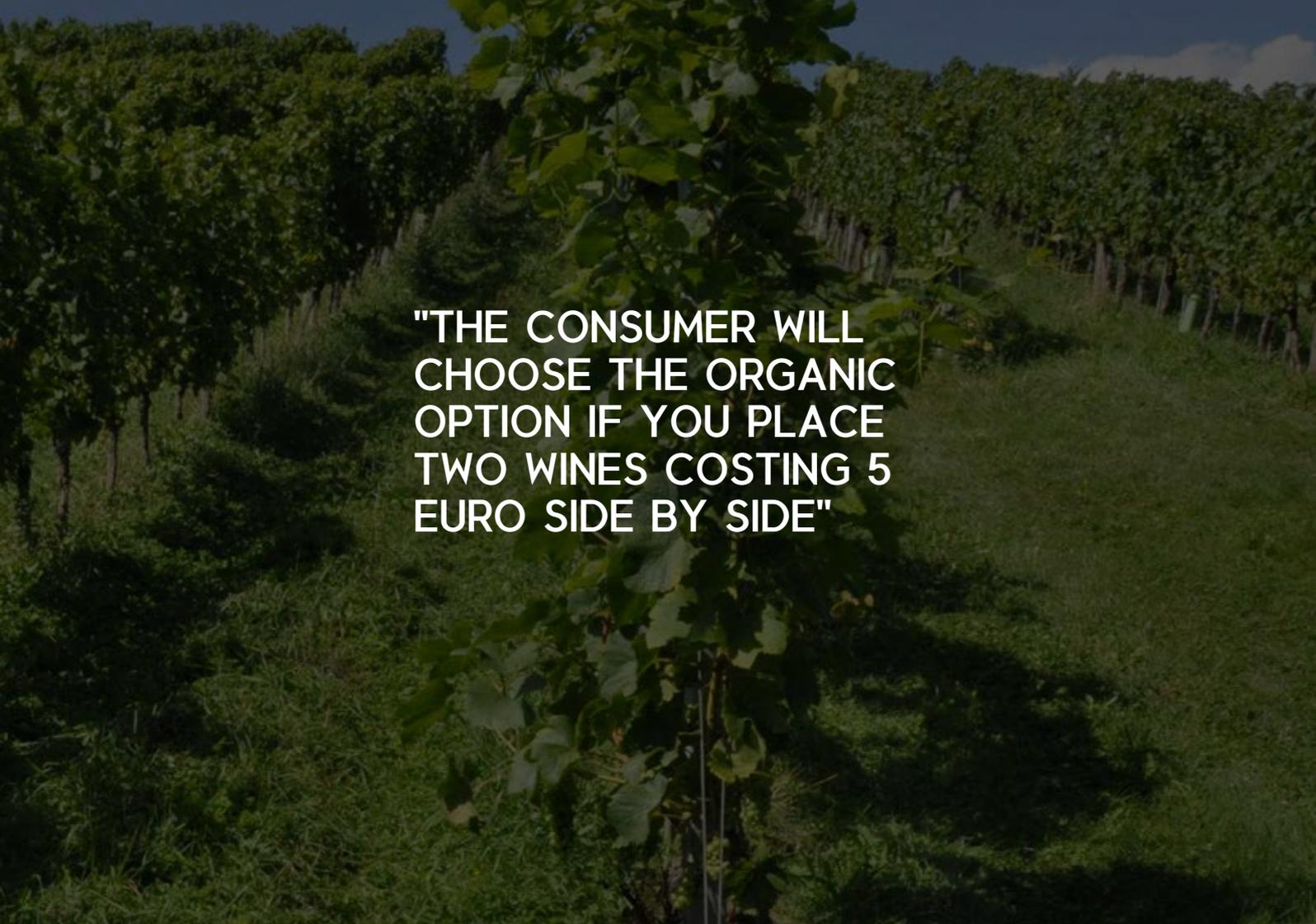


10% of the wines at Albert Heijn are organic. This is quite high when compared to the domestic average in the supermarkets (3 to 5%). We have a larger than average wine range but it is also important for us to offer a high quality and broad range. The range of organic wines will only increase in the future.

There is now a more extensive and broader range than five years ago. On the one hand, it concerns producers that we already worked with, who now are also going to grow organically. The discussion topic of organic has become far more current.

On the other hand, the quality of the producers has increased in general. Organic wine seemed like a distant dream 10 years ago. Now more good and larger producers are taking the step to also produce organically. In addition to the fact that the climate is more suited to organic production, there is greater confidence in organic wine, more on offer and ultimately increased demand. More and more producers are converting their vineyards. This is increasingly becoming an agenda point. Many markets are making the switch to organic. It is becoming an important aspect of the market. In rapidly growing markets, such as the US, there is much specific demand. Many food trends start there.

The quality of organic wine does not necessarily have to be better by definition. With organic wine it primarily concerns the working method how the wine is made, or how the vineyards are maintained. The organic sticker does not necessarily make the wine better by definition, but the consumer believes organic is better and tastier in general. And have a purer feeling associated with it. Here it always concerns the philosophy and 'personal touch' of the wine maker.



**"THE CONSUMER WILL
CHOOSE THE ORGANIC
OPTION IF YOU PLACE
TWO WINES COSTING 5
EURO SIDE BY SIDE"**

I believe organic wine is competitively priced. People who consciously opt for this tend to have a bit more money available for it. Customers often do not know the difference between organic and Fairtrade. And in any case, they do not immediately have more money available for one of these products unless they are specifically looking for them.

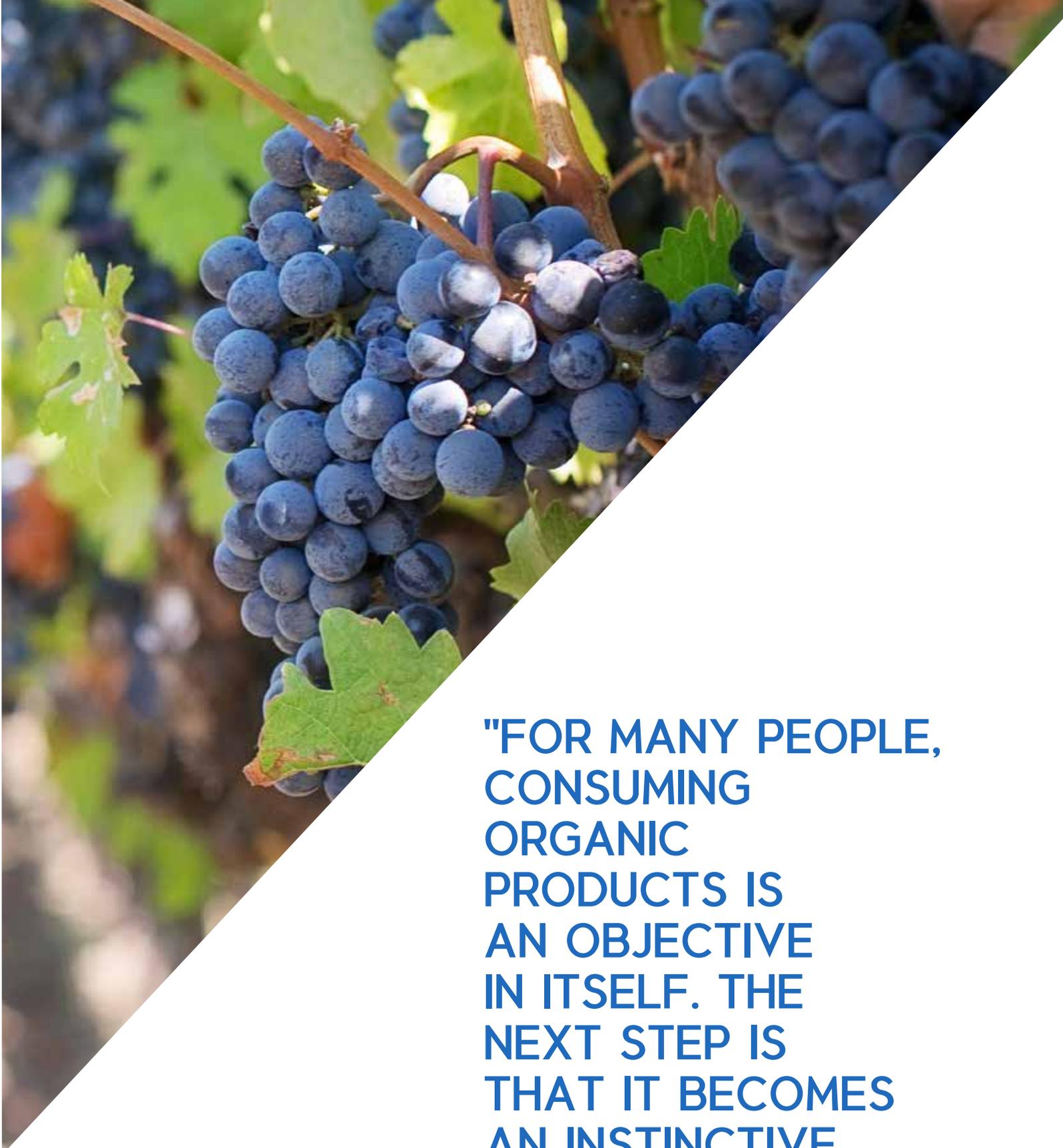
I think there is insufficient knowledge about what organic actually is. Therefore the consumer automatically believes that it is better. The consumer will choose the organic option if you place two wines costing 5 euro side by side. The wine that used to be available in organic stores did not have such a good name. Today the perception is much better. Supermarkets across the board are more busy with organic. Organic wine can also be extremely tasty, in addition the 'organic' aspect has many positive associations which clear the way for organic wine. Major wine brands increasingly opt for organic. Also a factor; consumers are sometimes unaware that they are choosing organic. We believe this should be clearer in the future. To be able to clearly choose for organic and select it from the shelves. We already have organic wine shelf signs, and organic wine bottles marked on the outside. It is always stated on the bottle if a wine is organic. Despite this, it is not always visible. For many people, consuming organic products is an objective in itself. The next step is that it becomes an instinctive choice.

We have now outgrown the 'organic trend'. It has become more of a pattern that is increasing. People are becoming increasingly aware of what they eat and drink, and many food producers are reducing salt and sugar. Demand is rising and people are becoming accustomed to it. The demand is not yet earth shattering. The consumer opts for recognition when making a choice for a product. And also with wine. They choose a label or brand. They take the safe decision. It is for these reasons that regular renowned brands are also switching. This is effective.



I think that the consumer who consciously chooses organic has more money available for it. They see organic wines as healthier. It is less treated and therefore a purer product, to my believes this is also on the mind of the consumer. Better for the environment. I wonder if the environmentally-aware consumer will also pay extra for this.

I believe there is still too little information about organic wine. The average consumer has not yet been reached. They do not yet know what it is. A greater transfer of information must take place both in the media as well as in the supermarket, despite the fact that the supermarket can also be very brief. A documentary on TV would also be helpful. This would allow you to delve much deeper into the topic. Many gains can be made here. People do not know much about the product of wine. In general, there is still more demand for information when it concerns what is on the shelves.



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CONCLUSION OF QUALITATIVE RESEARCH – WINE PROFESSIONALS

Wine professionals state that they notice that the offer, as well as the demand for organic wine has increased in recent years. Organic production started with small wine makers and has only recently been picked up by larger producers. The major houses can and will provide a boost to the acceptance and consumption of organic wine in the coming years. Wine professionals take the view that the pattern of growth will maintain.

They also agree that the taste and quality of non-organic or organic wine is not necessarily better or worse. However, they believe the consumer has the image that biological wine is better, healthier and more sustainable than non-organic wine. This immediately shows that the professionals generally think that the information about the topic of biological wine is too limited and ambiguous. There are too many different logos and indications for organic wine or which appeal to organic wine.

When consumers stand in front of the shelf they will first notice the price and recognise the label/brand when making a choice. The consumer can be persuaded to opt for organic wine more often but needs additional information about organic wine. Information creates desire. This has also partly to do with the organic trend that is currently 'en vogue'. Thanks to this, consumers in general are increasingly opting for environmentally-friendly and organic products, and this also applies to wine. Professionals also expect that with an identical price the consumer will more frequently opt for organic instead of regular, because there is a perception that organic is better. The image of organic wine has improved in recent years. This will only improve further. In general, professionals expect that the consumer is prepared to pay bit more for organic wine, compared to non-organic wine. A smart move of renowned brands is required to make the switch to organic, in view of the fact that consumers often opt for brands they are already familiar with. Consumers take the safe option.

After compiling this trend analysis, it is interesting to compare conclusions. It is important that wine professionals can estimate what the consumer thinks so that they can respond to this. Both the expectation of professionals and consumer feedback shows that there is a need for additional information about organic wines – information creates desire. This is the primary reason why consumers still do not drink organic wine in large numbers. Another reason for this is that organic wine is hard to find on the shelves, the professionals have submitted a solution for this: a designated shelf for organic wines. From both sides it appears that there are too many logos and hallmarks on the market, causing the consumer to feel confused.

The wine consumer stated to feel affinity with the organic wine producer, which is what the professionals expected. They stated to expect that the consumer wanted to support the organic wine producer and that is a reason to purchase organic wine.

The professionals expected 'environmentally-friendly' to be on top of the list, when consumers describe organic wines. Professionals are also aware that consumers primarily look at the price of the wine, but not necessarily the brand.

Organic wines are currently receiving attention with a significant segment of Dutch wine consumers. Professionals believe that they will even get more popular in the coming years, for various reasons of societal contribution to the 'hip' image of the wines.

Sudvinbio and Pitch Communications and PR



POINT BY POINT CONCLUSION

Wine consumers:

- 89% of wine consumers have tried an organic wine. There does not appear to be a difference in terms of the frequency of organic wine drinking between men and women.
- Reasons for not drinking organic wine are that too little information is available and that the organic wines are not easy to find.
- 'Environmentally-friendly' is a term that is often used to describe organic wine.
- The wine consumer appears to have an affinity for the organic wine maker, and almost always thinks of this when organic wines are mentioned.
- Wine consumers spend more on organic wines than on regular wines on average.
- There is a demand for additional information about organic wines.
- The wine consumer states to be prepared to pay more for products that contribute to the protection of the environment.

Wine professionals:

- Limited and unclear information on organic wines. This is a task for the wine sector.
- The amount of organic varieties under current (larger) labels is increasing.
- The consumer increasingly shows interest in the wine grower, who really does his best for the organic production.
- Constant growth in the production of organic wines. Producers are still often busy converting vineyards into organic ones.
- The consumer will be encouraged to purchase and consume organic wine thanks to sustainable behaviour and the improvement in the quality of organic wines.
- All the logos and hallmarks overwhelm the consumer.
- Benefits: the ground is not depleted plus a superior and healthier working environment for wine growers and staff.
- Wider range of interest for growth: more organic house wines in wine stores and supermarket chains.
- A special shelf for organic wines will increase consumption.
- Consumers are prepared to pay more for organic wine.
- Not a trend, but a lifestyle.
- The quality of organic wine is not better by definition.
- Wine consumers will opt for organic wines more frequently if the price of organic wine is equal to regular wine prices.

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