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MARKET ACCESS SECRETARIAT
Global Analysis Report

Sector Trends Analysis

WINE, BEER, AND SPIRITS

In Western Europe

Decembre 2016

EXECUTIVE SUMMARY

In 2015, Western Europe, imported US$26.9 billion worth of alcoholic drinks, with the United Kingdom, Germany, and France accounting for 52% of the region's imports. The region imported US$33.5 million worth of alcoholic drinks from Canada in 2015, a 13% decrease from the previous year. However, the countries that saw a high growth rate of imports from Canada were Norway, Netherlands, and Germany, with a growth rate of 63%, 13%, and 11% respectively. The product in those regions that saw fastest import growth was vodka with a combined compound annual growth rate of 79% from 2010 to 2015.

MarketLine reported that European consumption of alcoholic drinks is one of the biggest in the world, accounting for 43% of the global consumption in 2015. Despite this fact, the consumption and volume sales of alcoholic drinks in the region are in part affected by the rising health and wellness trends and the movement towards higher quality products. However, there are opportunities for niche alcoholic drinks that are of high quality as they are rising in consumer demand in this region.

From January 2010 to December 2015, there were 18,601 new product launches within the alcoholic drinks category. Beer was the leading category in new product launches, with 7,135 new launches during the period followed by wine (3,912) and flavoured alcoholic beverages (1,950). Of the countries to launch the most new alcoholic drinks in the region, France, Germany, and Spain were identified as excellent Western European markets at launching the most innovative alcoholic drinks.

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INTRODUCTION – POSITIONING WINE, BEER, AND SPIRITS IN THE WORLD

The alcoholic drinks retail market worldwide is worth approximately US$535.4 billion with a compound annual growth rate (CAGR) of 2.4% from 2010 to 2015. Within the total value of alcoholic drinks, spirits accounted for 43.3% of the alcoholic drinks market, followed by beer with 38.8% and wine with 17.9%. In the world, China, the United States, and Russia are the top markets. In Western Europe, the top alcoholic drinks markets are the United Kingdom with US$25.3 billion in retail value, Germany with US$ 18.5 billion, and France with US$15.4 billion, altogether accounting for 11.1% of the world's market share. Within the wine category, Western European countries are ranked high with the United Kingdom and France leading based on retail value sales in 2015 in comparison to the other alcoholic drinks categories.

Figure 1: Top Alcoholic Drinks Markets Worldwide in 2015, US$ Millions

#	Country	Retail Value ($)	Market Share (%)	CAGR* (%) 2010 - 2015
Worldwide		**535,346.61**	**-**	**2.4**
1	China	131,548.4	24.6	12.1
2	US	110,328.7	20.6	4.2
3	Russia	33,532.0	6.3	-3.1
4	Japan	28,553.0	5.3	-6.4
5	Brazil	26,999.5	5.0	-1.8
6	Mexico	25,425.3	4.7	2.6
7	UK	25,249.0	4.7	2.5
8	India	24,607.6	4.6	4.9
9	Germany	18,472.6	3.5	-1.7
10	France	15,430.5	2.9	0.0

Figure 2: Top Wine Markets Worldwide in 2015, US$ Millions

#	Country	Retail Value ($)	Market Share (%)	CAGR* (%) 2010 - 2015
Worldwide		**95,626.8**	**-**	**1.2**
1	US	25,388.7	26.5	5.3
2	UK	11,829.0	12.4	2.3
3	China	7,284.5	7.6	9.4
4	France	6,228.7	6.5	-0.8
5	Canada	5,960.0	6.2	-0.2
6	Germany	5,769.6	6.0	0.6
7	Russia	5,427.0	5.7	-5.8
8	Australia	4,798.4	5.0	-1.7
9	Switzerland	3,942.4	4.1	2.6
10	Japan	2,629.0	2.7	-2.1

Figure 3: Top Beer Markets Worldwide in 2015, US$ Millions

#	Country	Retail Value ($)	Market Share (%)	CAGR* (%) 2010 - 2015
Worldwide		**232,041.3**	**-**	0.4
1	US	45,070.0	19.4	2.7
2	China	*39,630.0*	17.1	5.6
3	Brazil	24,130.0	10.4	-1.2
4	Mexico	22,697.1	9.8	2.6
5	Japan	*18,163.0*	7.8	-6.7
6	Russia	9,196.0	4.0	-8.6
7	Germany	8,184.1	3.5	-2.9
8	Canada	7,110.0	3.1	-3.4
9	UK	6,600.0	2.8	1.8
10	India	6,316.0	2.7	10.0

Source for all: Mintel, 2015 ***CAGR** – Compound Annual Growth Rate

Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

Figure 4: Top Spirits Market Worldwide in 2015, US$ Millions

#	Country	Retail Value ($)	Market Share (%)	CAGR* (%) 2010 - 2015
Worldwide		**207,678.5**	**-**	**5.5**
1	China	84,633.9	40.8	16.6
2	US	39,870.0	19.2	5.1
3	Russia	18,909.0	9.1	1.6
4	India	18,080.0	8.7	3.4
5	Japan	7,761.0	3.7	-6.8
6	UK	6,820.0	3.3	3.3
7	France	5,410.4	2.6	-1.2
8	Germany	4,518.9	2.2	-2.3
9	Poland	3,023.4	1.5	-4.3
10	Thailand	2,146.0	1.0	2.1

Source: Mintel, 2015 ***CAGR** – Compound Annual Growth Rate

Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

TRADE

In 2015, Western European countries, imported US$26.9 billion worth of alcoholic drinks, with the United Kingdom (UK), Germany, and France accounting for 52% of the regions imports. Within the review period, from 2010 to 2015, the region experienced a slight compound annual growth rate (CAGR) of 0.02%. The major suppliers for the region are France, Italy, and the UK. The top alcoholic drinks to be imported in the region were fresh grape wine, beer (made with malt), whiskies, sparkling wine, and liqueurs and cordials, in combined accounting for 84% of alcoholic drink's imports.

Western Europe imported US$33.5 million worth of alcoholic drinks from Canada in 2015, a 13% decrease from the previous year (*see figure 6*). The top products imported into the region were whiskies with a market share of 47%, beer made with malt (with 16%), and vodka (with 14%). The top countries importing alcoholic drink from Canada in the region are France, the United Kingdom, and Germany (see figure 7). Through the review period, from 2010 to 2015, the countries to see a high growth rate of imports from Canada were Norway, Netherlands, and Germany, with a growth rate of 63%, 13%, and 11%.

Canadian exporters of alcoholic beverages should note that the Netherlands and Belgium are the gateway to the Europe. Their seaports and airports, combined with logistics firms offering a nice entry point into the EU market. For example, British Columbia's wineries are currently using warehouses in Amsterdam to sell in Europe.

An important factor that will positively impact Canadian wine, beer, and spirit exporters' competitiveness in Western Europe is the Canada-European Union Comprehensive Economic and Trade Agreement (CETA). Negotiations of the CETA concluded in August, 2014. Once CETA enters into force, EU tariffs on imports of Canadian alcoholic beverages (such as ice wine and alcoholic cider beverages) will be duty-free. For more information on CETA, please visit the following website: http://www.international.gc.ca/trade-agreements-accords-commerciaux/agr-acc/ceta-aecg/index.aspx?lang=eng

Figure 5: Top 10 Importers of Alcoholic Drinks* Worldwide 2015, US$

Country	Imports US$ Millions	Top Suppliers & Market Share (%)						Canada's Market Share (%)
		1		2		3		
Worldwide	**71,136.3**	**France**	**23.1**	**UK**	**11.7**	**Italy**	**10.9**	**0.99**
United States	18,014.7	Mexico	21.9	France	20.5	Italy	11.2	3.39
United Kingdom	6,517.8	France	27.5	Italy	16.4	US	7.6	0.11
Germany	4,867.7	Italy	24.7	France	19.3	Spain	10.9	0.11
China	3,498.6	France	44.5	Australia	13.0	Chile	6.7	0.34
Canada	3,166.3	US	23.7	France	15.4	Italy	12.4	0.14
France	2,680.7	UK	27.4	Belgium	12.8	Spain	11.8	0.29
Japan	2,399.6	France	36.6	South Korea	10.4	US	9.7	0.35
Singapore	2,093.9	France	51.4	UK	23.1	China	3.2	0.06
Hong Kong	2,039.4	France	52.9	China	12.3	UK	9.0	0.10
Netherlands	1,967.1	France	19.9	Germany	16.5	Belgium	12.6	0.14

Figure 6: Alcoholic Drinks* Export Gap, 2015 in US$ Millions

	2010	2011	2012	2013	2014	2015	CAGR* (%)
Western Europe Imports from the World	26,834.9	29,994.8	29,443.9	30,805.3	30,997.6	26,861.2	0.02
Western Europe Imports from Canada	32.5	34.8	31.3	34.2	38.7	33.5	0.61
Gross Export Gap	**26,802.4**	**29,960.0**	**29,412.6**	**30,771.1**	**30,958.9**	**26,827.7**	**0.02**

Figure 7: Top 10 Western European Countries to Import Alcoholic Drinks from Canada, US$ Millions

Country	2010	2011	2012	2013	2014	2015	CAGR* (%)
Western Europe	**32.5**	**34.8**	**31.3**	**34.2**	**38.7**	**33.5**	**0.60**
France	7.8	8.5	8.2	7.1	9.9	7.8	0.20
United Kingdom	9.2	8.5	7.4	9.8	9.1	7.4	-4.42
Germany	3.3	3.3	3.0	3.6	5.2	5.5	10.52
Netherlands	1.5	2.0	1.8	2.3	2.3	2.8	13.05
Norway	0.2	1.5	1.4	1.8	3.4	2.1	62.66
Finland	1.3	1.7	2.8	3.0	2.4	2.0	9.52
Sweden	2.3	2.9	2.5	2.2	2.4	2.0	-3.03
Switzerland	0.7	0.6	0.7	1.4	1.2	1.1	8.22
Spain	2.9	2.8	2.4	1.6	0.9	0.9	-21.66
Italy	0.4	0.4	0.4	0.5	0.6	0.5	4.25

Source for all: Global Trade Tracker, 2016

Note: For the purpose of this report, alcoholic drinks was defined using the following HS codes: 2203, 2204, 2205, 2206, & 2208

MARKET TRENDS

As reported by MarketLine, European consumption of alcoholic drinks is one of the biggest in the world, accounting for 43% of the global consumption in 2015. Despite this fact, the consumption and volume sales of alcoholic drinks in the region are in part affected by the rising health and wellness trends and the movement towards higher quality products.

The health and wellness trend in Western Europe is dynamically influencing the alcoholic drinks sector. As a result of this, consumers are reducing their alcoholic intake and drinking alcoholic drinks at a moderate rate, more so than ever before. On the negative side, the trend is driving consumers to alternative substitutes that are non-alcoholic drinks such as juices and alcohol-free lager (MarketLine, 2015). Alternatively, health considerations are expected to further influence the performance of alcoholic drinks and the types of alcoholic products that are being produced in the sector such as gluten-free beers and spirits. For example, consumers in Norway are demanding more reduced calorie alcoholic products in beer, cider, and ready-to-drink (RTD) beverages. This is also true for countries such as Finland, demanding more trendy, light and modern alcoholic drinks which have a positive influence on the volume consumption of wine-based and RTD beverages (Euromonitor International, 2016).

In addition, the movement towards premium products, specifically alcoholic products of high quality with low alcoholic content, are forecasted to grow. As a result, alcoholic drink producers in the region are focusing on further developing a premium brand image and premium packaging as consumers are willing to pay for high quality and strong brand name. For example, in Germany there are growing demands for craft beers, where larger beers and other beers (such as festival beers, cellar beers, country-styles beers etc.) recorded the highest growth rates in 2015 (Lebensmittel Zeitung, 2015). This trend is especially true in the spirits category for gin, vodka, and dark/white rum, where locally produced and hand-crafted spirits are developing.

In terms of packaging, Germany producers are now preparing beers in old-fashioned bottles, while in France; non-glass packaging material is becoming more common in the food service section and within the alcoholic drinks category (gag-n-box).

The alcoholic drinks market in the region is highly controlled by consumer preferences, due to this fact, leading players are investing highly in marketing campaigns to promote their products. In addition, brand loyalty is important as consumer's preference towards some brands influences new product launches and product positioning (MarketLine, 2015). This presents a great opportunity for niche alcoholic drinks (such as craft beers and spirits) where specialty alcoholic drinks are rising in demand, and if marketed based on quality and diversity then they can be sold at a higher price and appeal to the Western European consumer need for premium and healthier alcoholic beverages.

MARKET SIZE

The Western Europe alcoholic drinks market was estimated to be worth US$95.1 billion in retail sales in 2015 with a 12% decrease from the previous year (*see figure 8*). The review period from 2011 to 2015 experienced a negative compound annual growth rate (CAGR) of 2.3%; this decline in sales was presented across all three major alcoholic drink categories (wine, beer, and spirits) in the region. This trend is also true in the markets total volume sales of alcoholic drinks, where the review period, showed a slight decrease with a CAGR of -0.7% and a closing total volume sales of 39,200 million litres (*see figure 9*). The top countries within the region, in terms of retail sales and total volume sales, are the United Kingdom with an estimated total of US$25.3 billion and 5,771.8 million litres, Germany with US$18.5 billion and 11,024.5 million, and France with US$15.4 billion and 5,249.4 million litres in 2015 (*see figure 12*).

In Western Europe, beer is the largest alcoholic drink category that accounted for 66% of total volume sales in 2015, followed by wine and spirits. Wine accounted for 41% of the retail value sales, followed by beer and spirits. Despite this decrease, the region is projected to experience positive growth with a forecasted retail value of US$104.6 billion by 2019 and a CAGR of 3.4% (*see figure 10*). In total volume sales, the sector is expected to increase slightly in volume with a closing total of 39,771.1 million litres and a CAGR of 0.5% in 2019 (*see figure 11*).

Note each state in the Western Europe region has different excise taxes for various categories of wines, beers, and spirits. See the European Commission "Excise Duty Tables" to view tax rates for each member states of the European Union:
https://ec.europa.eu/taxation_customs/sites/taxation/files/docs/body/excise_duties-part_i_alcohol_en.pdf

Figure 8: Historic Retail Value Sales of Alcoholic Drinks in Western Europe, in US$ Millions

Category	2011	2012	2013	2014	2015	CAGR* (%)
Total Alcoholic Drinks	**104,310.7**	**100,490.1**	**105,328.9**	**108,502.0**	**95,093.3**	**-2.29**
Wine	42,334.7	40,883.4	42,595.0	43,757.9	38,745.8	-2.19
Beer	35,328.4	33,889.6	36,051.7	37,570.4	32,476.0	-2.08
Spirits	26,647.6	25,717.1	26,682.2	27,173.6	23,871.5	-2.71

Figure 9: Historic Total Volume Sales of Alcoholic Drinks in Western Europe, in million litres

Category	2011	2012	2013	2014	2015	CAGR* (%)
Total Alcoholic Drinks	**40,367.4**	**39,833.0**	**39,432.9**	**39,358.4**	**39,200.0**	**-0.73**
Wine	12,053.5	12,026.2	11,922.4	11,665.6	11,584.2	-0.99
Beer	26,448.2	25,964.9	25,708.1	25,915.9	25,848.0	-0.57
Spirits	1,865.7	1,841.9	1,802.4	1,776.9	1,767.8	-1.34

Figure 10: Forecast Retail Value Sales of Alcoholic Drinks in Western Europe, in US$ Millions

Category	2016	2017	2018	2019	CAGR* (%)
Total Alcoholic Drinks	**94,586.5**	**96,578.9**	**100,165.6**	**104,565.9**	**3.40**
Wine	38,215.1	39,137.5	40,468.8	41,818.9	3.05
Beer	32,716.3	33,270.2	34,630.2	36,263.7	3.49
Spirits	23,655.1	24,171.1	25,066.6	26,483.3	3.84

Figure 11: Forecast Total Volume Sales of Alcoholic Drinks in Western Europe, in million litres

Category	2016	2017	2018	2019	CAGR* (%)
Total Alcoholic Drinks	**39,241.0**	**39,497.5**	**39,768.2**	**39,771.1**	**0.45**
Wine	11,600.0	11,735.1	11,858.7	11,686.2	0.25
Beer	25,877.9	25,998.3	26,141.2	26,311.9	0.56
Spirits	1,763.1	1,764.0	1,768.3	1,773.0	0.19

Figure 12: Top 10 Countries in Western Europe in 2015

By Retail Value Sales, in US$ Millions

Country	Sales
Total Alcoholic Drinks	**95,093.3**
1. UK	25,249.0
2. Germany	18,472.6
3. France	15,430.5
4. Spain	3,844.8
5. Italy	4,522.7
6. Netherlands	3,260.5
7. Norway	3,434.5
8. Turkey	2,179.9
9. Finland	2,577.1
10. Sweden	3,827.3

By Total Volume Sales, in Million litres

Country	Sales
Total Alcoholic Drinks	**39,200.0**
1. Germany	11,024.5
2. UK	5,771.8
3. France	5,249.4
4. Spain	4,403.3
5. Italy	4,193.7
6. Netherlands	1,572.4
7. Belgium	1,124.6
8. Austria	1,122.1
9. Portugal	939.3
10. Turkey	924.7

Source for all: Mintel, 2016

Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

Wine

The wine category witnessed a negative performance during the review period (2011 to 2015), closing with an estimated US$38.8 billion in retail value sales and a compound annual growth rate (CAGR) of -2.2% (*see figure 13*). Of all the evaluated countries in the region, the United Kingdom witnesses a slight growth with a CAGR of 0.82% and a closing retail value of US$11.8 billion in 2015. The countries to see the worst performance were Spain and Norway with a -7.6% and -6.2% CAGR. Countries like France who is experiencing stagnant growth is starting to see a trend where rose wines are becoming bigger than white wines in terms of market size, while flavour wines is becoming more common.

In terms of total volume sales, the category performed fairly better than retail sales, as the review period only saw a CAGR of -1% (*See figure 14*). The wine subcategory is expected to see positive growth in the forecast period. On a more granular level natural and biodynamic wines (made by using holistic, ecological and ethical biodynamic farming principals) are expected to witness further growth.

Figure 13: Historic Retail Sales of Wine in Western Europe by Country, in US$ Millions

Country	2011	2012	2013	2014	2015[E]	CAGR* (%)
Western Europe	**42,334.7**	**40,883.4**	**42,595.0**	**43,757.9**	**38,745.8**	**-2.19**
Austria	642.5	613.6	678.7	689.7	590.3	-2.10
Belgium	976.1	923.1	986.8	*1,019.0*	872.7	-2.76
Denmark	1,166.1	1,084.8	1,128.8	1,151.7	970.4	-4.49
Finland	771.2	738.1	761.2	776.9	666.7	-3.57
France	6,949.7	6,556.0	7,072.4	7,246.8	6,228.7	-2.70
Germany	6,701.8	6,482.7	6,735.3	6,762.7	5,769.6	-3.68
Italy	2,378.6	2,228.8	2,422.8	2,437.9	2,020.2	-4.00
Netherlands	920.0	872.7	907.3	937.3	804.6	-3.30
Norway	1,601.7	1,599.1	1,625.4	1,563.7	1,241.0	-6.18
Portugal	466.7	422.6	468.5	475.9	402.8	-3.61
Spain	1,601.7	1,431.5	1,460.8	1,422.5	1,167.7	-7.60
Sweden	2,359.1	2,341.2	2,520.7	2,480.6	2,065.8	-3.26
Switzerland	4,177.2	3,879.0	3,989.6	4,130.9	3,942.4	-1.44
Turkey	175.3	185.2	200.7	190.3	173.9	-0.20
UK	11,447.0	11,525.0	11,636.0	12,472.0	11,829.0	0.82

Figure 14: Historic Total Volume Sales of Wine in Western Europe by Country, in Million Litres

Country	2011	2012	2013	2014	2015[E]	CAGR* (%)
Western Europe	**12,053.5**	**12,026.2**	**11,922.4**	**11,665.6**	**11,584.2**	**-0.99**
Austria	256.0	255.5	256.2	263.0	262.4	0.62
Belgium	290.2	286.3	278.6	*284.3*	281.6	-0.75
Denmark	172.8	153.6	147.3	148.5	149.1	-3.62
Finland	58.9	59.6	58.8	58.2	59.4	0.19
France	3,180.1	3,219.3	3,319.4	3,176.4	3,080.6	-0.79
Germany	2,130.2	2,149.5	2,100.1	2,060.0	2,097.2	-0.39
Italy	2,388.4	2,355.4	2,316.5	2,288.7	2,257.7	-1.40
Netherlands	355.7	364.9	344.0	340.7	348.8	-0.49
Norway	69.1	70.6	71.3	71.7	70.8	0.61
Portugal	479.9	463.8	432.4	428.7	433.5	-2.51
Spain	796.5	799.8	747.2	713.4	707.8	-2.91
Sweden	236.1	235.7	239.8	239.5	241.2	0.54
Switzerland	296.4	289.9	295.7	290.0	290.6	-0.49
Turkey	56.6	54.9	60.1	63.5	68.5	4.87
UK	1,286.6	1,267.5	1,255.0	1,239.0	1,235.1	-1.02

Source for both: Mintel, 2015 E= Estimate *** CAGR** = Compound annual Growth Rate

Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

Figure 15: Forecast Retail Sales of Wine in Western Europe by Country, in US$ Millions

Country	2016E	2017F	2018 F	2019F	CAGR* (%)
Western Europe	**38,215.1**	**39,137.5**	**40,468.8**	**41,818.9**	**3.05**
Austria	601.9	615.0	646.9	690.9	4.70
Belgium	886.4	898.7	941.7	NA*	3.07
Denmark	978.8	994.5	1,037.3	1,102.7	4.05
Finland	680.9	693.5	737.0	789.7	5.07
France	6,336.8	6,442.7	6,760.3	7,169.5	4.20
Germany	5,847.3	5,882.4	6,142.4	6,519.2	3.69
Italy	2,005.4	1,995.3	2,053.7	2,139.3	2.18
Netherlands	817.9	840.7	888.9	957.0	5.37
Norway	1,198.9	1,260.6	1,346.3	1,496.4	7.67
Portugal	404.2	405.9	421.2	441.0	2.95
Spain	1,139.8	1,118.4	1,158.1	1,220.8	2.31
Sweden	2,133.0	2,213.9	2,340.1	2,531.7	5.88
Switzerland	3,810.9	3,878.6	3,963.9	4,183.8	3.16
Turkey	179.9	190.3	203.1	216.9	6.43
UK	11,193.0	11,707.0	11,828.0	12,360.0	3.36

Figure 16: Forecast Total Volume Sales of Wine in Western Europe by Country, in Million Litres

Country	2016E	2017F	2018 F	2019F	CAGR* (%)
Western Europe	**11,600.0**	**11,735.1**	**11,858.7**	**11,686.2**	**0.25**
Austria	259.4	258.9	260.9	262.1	0.35
Belgium	279.3	276.2	272.7	NA*	-1.19
Denmark	148.8	147.7	148.4	149.8	0.22
Finland	60.5	61.4	62.9	64.2	1.99
France	3,133.4	3,250.5	3,316.4	3,366.1	2.42
Germany	2,109.3	2,116.6	2,146.1	2,166.2	0.89
Italy	2,210.2	2,215.4	2,223.2	2,218.7	0.13
Netherlands	352.6	355.8	357.8	360.4	0.73
Norway	71.6	72.1	72.4	72.7	0.53
Portugal	441.1	447.0	451.5	456.0	1.11
Spain	699.3	694.5	700.0	710.5	0.53
Sweden	242.7	244.1	246.8	249.4	0.91
Switzerland	290.1	290.5	290.7	291.1	0.11
Turkey	72.5	76.0	78.3	82.0	4.18
UK	1,229.2	1,228.4	1,230.6	1,237.0	0.21

Source for both: Mintel, 2015 E= Estimate F=Forecast ***CAGR** = Compound annual Growth Rate
Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary
***NA** – Data not available

Figure 17: Historic & Forecast of Retail Volume Consumption Per Capita (population) of Wine In Litres

Country	2010	2011	2012	2013	2014	2015[E]	2016[E]	2017[F]	2018[F]
Austria	11.50	11.30	11.00	11.30	11.20	11.00	10.90	10.70	10.50
Belgium	17.20	16.96	16.91	16.13	15.94	15.67	15.60	15.32	15.21
Denmark	26.20	25.50	22.60	21.70	21.80	21.80	21.70	21.50	21.40
Finland	9.80	9.93	9.99	9.83	9.70	9.87	10.00	10.20	10.40
France	17.27	17.21	17.22	17.27	17.11	17.17	17.16	17.15	17.14
Germany	21.63	21.74	22.00	21.45	20.86	21.13	21.06	20.99	21.16
Italy	12.83	12.71	12.33	12.03	11.85	11.67	11.42	11.24	11.07
Netherlands	10.77	10.55	10.69	10.02	10.24	10.51	10.65	10.74	10.81
Norway	12.80	12.90	13.00	13.10	13.10	12.80	12.90	12.90	12.90
Portugal	11.19	11.32	11.24	10.99	10.81	10.76	10.73	10.93	11.25
Spain	10.64	10.59	10.67	9.91	9.44	9.30	9.21	9.17	9.24
Sweden	19.60	20.10	19.90	20.10	20.00	19.50	19.20	18.90	18.71
Switzerland	31.30	31.90	31.00	31.50	30.70	30.70	30.60	30.50	30.40
Turkey	0.24	0.23	0.24	0.25	0.26	0.28	0.29	0.31	0.32
UK	16.79	16.82	16.52	16.43	16.12	15.98	15.84	15.76	15.70

Source: Mintel, 2015 E= Estimate F=Forecast

Beer

The beer category witnessed a negative performance with a compound annual growth rate (CAGR) of -2.1% in retail values and -0.6 in total volume sales from 2011 to 2015 (*See figure 18 & 19*). The category ended the review period with US$32.5 billion in retail value sales and 25,848 in million litres. Of all the evaluated countries in the region, France witnessed the highest growth with a CAGR of 2.04% and a closing retail value of US$3.8 billion and 1,818.3 in million litres in 2015. The country to see the worst performance was Portugal with a CAGR of -6.4% from 2011 to 2015. Despite the decline in the review period, the category is expected to see a positive performance in the forecasted period from 2016 to 2019, with retail value sales and total volume experiencing a CAGR of 3.5% and 0.6% (See figure 20 & 21). Smaller domestic players are expected to enter the market where there will be more production focus on new varieties of beer, new tastes, and new types of beer such as craft beer. This is especially true in countries such as Belgium and Germany (Euromonitor International, 2016).

Figure 18: Historic Retail Value Sales of Beer in Western Europe by Country, in US$ Millions

Country	2011	2012	2013	2014	2015	CAGR* (%)
Western Europe	**35,328.4**	**33,889.6**	**36,051.7**	**37,570.4**	**32,476.0**	**-2.08**
Austria	1,233.0	1,173.0	1,231.0	1,235.0	1,037.0	-4.24
Belgium	1,168.0	1,100.0	1,193.0	1,235.0	1,048.0	-2.67
Denmark	749.6	707.3	708.7	704.6	592.4	-5.71
Finland	1,537.1	1,444.9	1,560.3	1,578.1	1,282.7	-4.42
France	3,497.8	3,377.4	4,044.7	4,300.8	3,791.4	2.04
Germany	9,658.5	8,823.1	9,186.7	9,852.7	8,184.1	-4.06
Italy	1,880.4	1,801.0	1,872.4	1,922.8	1,717.3	-2.24
Netherlands	1,838.5	1,717.8	1,899.1	2,014.9	1,719.8	-1.65
Norway	1,577.0	1,566.9	1,776.4	1,751.3	1,399.4	-2.94
Portugal	439.7	406.3	426.0	383.7	337.2	-6.42
Spain	1,996.0	1,900.4	1,968.8	2,032.5	1,736.8	-3.42
Sweden	1,324.9	1,244.0	1,333.8	1,289.5	1,090.3	-4.76
Switzerland	700.9	684.5	716.2	738.5	705.4	0.16
Turkey	1,272.2	1,470.0	1,565.8	1,483.5	1,234.2	-0.76
UK	6,454.8	6,473.0	6,568.8	7,047.5	6,600.0	0.56

Source for all: Mintel, 2016 ***CAGR** – Compound Annual Growth Rate

Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

Figure 19: Historic Total Volume Sales of Beer in Western Europe by Country, in Millions Litres

Country	2011	2012	2013	2014	2015	CAGR* (%)
Western Europe	**26,448.2**	**25,964.9**	**25,708.1**	**25,915.9**	**25,848.0**	**-0.57**
Austria	844.9	846.2	845.4	830.2	823.3	-0.65
Belgium	857.5	824.6	804.2	829.1	798.4	-1.77
Denmark	367.0	344.0	344.9	350.0	352.9	-0.97
Finland	448.8	422.8	427.4	418.4	413.7	-2.02
France	1,743.4	1,738.0	1,715.5	1,749.8	1,818.3	1.06
Germany	8,765.5	8,627.9	8,588.8	8,651.2	8,443.5	-0.93
Italy	1,744.7	1,762.2	1,744.9	1,737.0	1,783.3	0.55
Netherlands	1,169.0	1,139.8	1,105.6	1,134.5	1,168.9	0.00
Norway	239.4	233.5	237.2	243.1	241.3	0.20
Portugal	532.0	492.7	493.7	475.7	481.5	-2.46
Spain	3,494.6	3,406.5	3,353.8	3,429.9	3,534.6	0.28
Sweden	486.2	472.6	471.1	470.0	469.2	-0.89
Switzerland	462.6	465.9	468.5	474.6	475.0	0.66
Turkey	830.5	893.2	878.1	856.4	790.1	-1.24
UK	4,462.1	4,295.0	4,229.0	4,266.0	4,254.0	-1.19

Figure 20: Forecast Retail Value Sales of Beer in Western Europe by Country, in US$ Million

Country	2016[E]	2017[F]	2018[F]	2019[F]	CAGR* (%)
Western Europe	**32,716.3**	**33,270.2**	**34,630.2**	**36,263.7**	**3.49**
Austria	1,055.0	1,068.0	1,109.0	1,169.2	3.49
Belgium	1,063.0	1,084.0	1,138.3	1,204.4	4.25
Denmark	587.2	594.1	616.5	655.3	3.73
Finland	1,267.3	1,262.6	1,312.4	1,384.3	2.99
France	4,363.3	4,476.3	4,801.9	4,868.0	3.72
Germany	8,109.6	8,065.9	8,301.7	8,661.8	2.22
Italy	1,756.9	1,803.4	1,911.9	2,060.2	5.45
Netherlands	1,724.7	1,784.3	1,916.9	2,063.8	6.17
Norway	1,385.4	1,467.1	1,588.2	1,779.5	8.70
Portugal	354.9	371.4	399.4	427.2	6.38
Spain	1,757.7	1,781.2	1,866.1	1,977.6	4.01
Sweden	1,114.4	1,146.6	1,198.2	1,279.2	4.70
Switzerland	684.0	696.5	721.4	762.1	3.67
Turkey	1,260.0	1,281.8	1,269.7	1,300.1	1.05
UK	6,232.9	6,387.0	6,478.6	6,671.0	2.29

Source for both: Mintel, 2015 E= Estimate F=Forecast ***CAGR** = Compound annual Growth Rate
Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

Figure 21: Forecast Total Volume Sales of Beer in Western Europe by Country, in Million Litres

Country	2016^E	2017^F	2018^F	2019^F	CAGR* (%)
Western Europe	**25,877.9**	**25,998.3**	**26,141.2**	**26,311.9**	**0.56**
Austria	812.5	839.9	831.4	828.7	0.66
Belgium	776.6	758.8	744.3	731.6	-1.97
Denmark	363.1	369.0	374.9	380.7	1.59
Finland	404.3	399.6	394.9	392.6	-0.97
France	1,850.5	1,877.2	1,904.4	1,931.7	1.44
Germany	8,319.8	8,240.7	8,183.0	8,127.7	-0.78
Italy	1,811.6	1,852.9	1,904.4	1,949.7	2.48
Netherlands	1,197.6	1,225.5	1,245.3	1,271.6	2.02
Norway	246.9	250.9	249.3	246.3	-0.08
Portugal	490.1	500.9	512.9	520.1	2.00
Spain	3,608.7	3,724.3	3,841.7	3,962.9	3.17
Sweden	463.6	465.2	462.7	459.4	-0.30
Switzerland	481.4	485.4	489.0	492.4	0.76
Turkey	800.2	783.0	765.0	745.5	-2.33
UK	4,251.0	4,225.0	4,238.0	4,271.0	0.16

Source: Mintel, 2015 E= Estimate F=Forecast ***CAGR** – Compound Annual Growth Rate
Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

Figure 22: Historic & Forecast Retail Volume Consumption Per Capita of Beer in Litres

Countries	2011	2012	2013	2014	2015	2016^E	2017^F	2018^F	2019^F	2020^F
Austria	66.60	67.60	67.80	67.80	68.20	*68.90*	*69.80*	*70.30*	*70.90*	*71.30*
Belgium	41.72	40.41	39.81	39.65	39.10	*38.48*	*38.21*	*37.78*	*37.26*	*36.88*
Denmark	48.50	45.20	45.10	45.60	46.00	*47.20*	*47.80*	*48.40*	*49.10*	*49.60*
Finland	70.60	66.00	66.60	65.00	64.10	*61.90*	*60.70*	*59.60*	*59.00*	*58.30*
France	20.26	20.49	20.56	21.62	22.54	*23.40*	*23.93*	*24.47*	*25.01*	*25.53*
Germany	72.84	71.73	70.85	71.41	70.63	*69.97*	*69.40*	*68.85*	*68.35*	*67.88*
Italy	13.99	14.23	14.21	14.18	14.72	*15.18*	*15.65*	*16.12*	*16.59*	*17.07*
Netherlands	49.33	47.96	47.73	49.18	50.98	*52.13*	*53.01*	*53.73*	*54.79*	*55.92*
Norway	36.00	35.20	37.40	38.40	37.70	*38.60*	*39.40*	*38.90*	*38.30*	*37.90*
Portugal	20.26	19.19	19.90	17.85	18.04	*18.46*	*18.98*	*19.32*	*19.51*	*19.00*
Spain	26.18	27.02	27.43	28.18	28.59	*29.02*	*29.56*	*30.04*	*30.58*	*31.19*
Sweden	40.90	39.30	39.10	38.90	38.50	*38.10*	*37.47*	*36.83*	*36.32*	*35.85*
Switzerland	33.10	32.70	32.90	33.20	32.90	*33.10*	*33.00*	*32.90*	*32.90*	*32.90*
Turkey	8.65	9.26	8.97	8.54	7.78	*7.75*	*7.52*	*7.29*	*7.06*	*6.84*
UK	32.11	31.23	31.21	31.97	31.92	*31.75*	*31.71*	*31.89*	*32.04*	*32.63*

Source: Mintel, 2015 E= Estimate F=Forecast

Spirits

Similarly to the other alcoholic drink categories, spirits also experienced a negative performance in growth with a compound annual growth rate (CAGR) of -2.7% (*See figure 23*). In 2015, the category closed with an estimated retail value of US$23.9 billion in retail value sales and 1,767.8 in million litres in total volume sales (*See figure 24*). The country with the best performance was the United Kingdom with a CAGR of 2.4% from 2011 to 2015; while Spain saw the worst performance in this category with a CAGR of -7.6% from 2011 to 2015. In the forecast period, the category is also expected to see positive growth both in retail value and total volume sales with a CAGR of 3.8% and 0.2% (*See figure 25 & 26*). This is in part due to the premiumisation trend and generation shift towards brown spirits (Euromonitor International, 2016).

Figure 23: Historic Retail Value Sales of Spirits in Western Europe by Country, in US$ Millions

Country	2011	2012	2013	2014	2015[E]	CAGR* (%)
Western Europe	**26,647.6**	**25,717.1**	**26,682.2**	**27,173.6**	**23,871.5**	**-2.71**
Austria	402.5	372.3	394.9	367.7	293.6	-7.58
Belgium	730.1	688.2	762.5	801.6	706.2	-0.83
Denmark	302.6	312.2	328.7	341.6	297.9	-0.40
Finland	850.0	761.0	785.9	768.8	627.7	-7.30
France	6,071.7	5,847.2	6,216.1	6,308.7	5,410.4	-2.84
Germany	5,444.0	5,087.9	5,366.0	5,330.1	4,518.9	-4.55
Italy	1,020.0	905.0	930.7	935.5	785.2	-6.33
Netherlands	978.6	899.2	881.7	865.1	736.1	-6.87
Norway	1,003.7	1,004.3	1,030.1	989.0	794.1	-5.69
Portugal	198.6	170.9	177.7	179.3	148.6	-6.99
Spain	1,292.0	1,144.0	1,156.0	1,130.0	940.3	-7.64
Sweden	841.0	808.1	829.8	793.8	671.2	-5.48
Switzerland	375.3	358.9	373.1	369.2	349.6	-1.76
Turkey	936.5	995.7	919.3	904.7	771.8	-4.72
UK	6,201.0	6,362.2	6,529.7	7,088.5	6,820.0	2.41

Figure 24: Historic Total Volume Sales of Spirits in Western Europe by Country, in Millions Litres

Country	2011	2012	2013	2014	2015	CAGR* (%)
Western Europe	**1,865.7**	**1,841.9**	**1,802.4**	**1,776.9**	***1,767.8***	**-1.34**
Austria	38.9	39.5	39.9	37.64	*36.42*	-1.63
Belgium	47.7	46.9	45.83	45.17	*44.61*	-1.66
Denmark	15.42	17.82	18.34	18.95	*19.52*	6.07
Finland	27.63	26.25	24.31	22.8	*21.57*	-6.00
France	380.3	372.4	360.7	354	*350.5*	-2.02
Germany	483	488.6	489.1	487.1	*483.8*	0.04
Italy	172.6	163.7	158.4	153.6	*152.7*	-3.02
Netherlands	63.95	62.62	56.36	54.1	*54.7*	-3.83
Norway	13.59	13.29	12.89	12.62	*12.35*	-2.36
Portugal	26.83	26.26	25.65	24.94	*24.26*	-2.49
Spain	194.3	181.9	172.5	162.6	*160.9*	-4.61
Sweden	25.6	25.5	25.51	25.39	*26.08*	0.47
Switzerland	30.9	31.27	32.18	31.68	*31.52*	0.50
Turkey	71.28	69.2	64.02	65.13	*66.13*	-1.86
UK	273.7	276.7	276.7	281.2	*282.7*	0.81

Source for both: Mintel, 2015 ***CAGR** – Compound Annual Growth Rate

Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

Figure 25: Forecast Retail Value Sales of Spirits in Western Europe by Country, in US$ Million

Country	2016[E]	2017[F]	2018[F]	2019[F]	CAGR* (%)
Western Europe	**23,655.1**	**24,171.1**	**25,066.6**	**26,483.3**	**3.84**
Austria	287.9	294.5	301.6	322.0	3.80
Belgium	729.1	751.6	799.3	859.0	5.62
Denmark	310.0	327.5	351.3	385.3	7.51
Finland	623.3	619.3	642.8	682.4	3.07
France	5,477.0	5,539.2	5,786.8	6,115.1	3.74
Germany	4,504.3	4,483.6	4,652.6	4,895.9	2.82
Italy	783.5	786.4	821.0	867.8	3.47
Netherlands	733.3	727.9	746.7	773.9	1.81
Norway	767.4	813.3	877.9	984.5	8.66
Portugal	147.5	146.0	149.0	153.9	1.43
Spain	934.1	920.8	940.2	968.0	1.20
Sweden	680.7	687.7	704.4	735.9	2.63
Switzerland	336.3	337.7	339.8	353.8	1.71
Turkey	809.4	896.6	1,004.7	1,126.3	11.64
UK	6,531.3	6,839.1	6,948.4	7,259.6	3.59

Figure 26: Forecast Total Volume Sales of Spirits in Western Europe by Country, in Million Litres

Country	2016[E]	2017[F]	2018[F]	2019[F]	CAGR* (%)
Western Europe	**1,763.1**	**1,764.0**	**1,768.3**	**1,773.0**	**0.19**
Austria	36.3	37.1	37.0	37.7	1.26
Belgium	44.2	43.9	43.6	43.5	-0.56
Denmark	20.3	21.1	21.9	22.8	3.96
Finland	20.9	20.5	20.4	20.7	-0.30
France	349.0	348.2	347.8	348.5	-0.05
Germany	481.3	479.4	478.5	475.4	-0.41
Italy	151.8	153.4	155.4	157.3	1.19
Netherlands	53.3	52.6	53.3	53.3	0.00
Norway	12.2	11.9	11.6	11.3	-2.53
Portugal	24.0	23.7	23.6	23.6	-0.56
Spain	159.6	159.3	158.2	158.0	-0.34
Sweden	26.0	25.9	25.8	26.0	-0.09
Switzerland	31.6	31.8	32.0	32.3	0.75
Turkey	65.9	65.6	65.3	65.0	-0.47
UK	286.7	289.7	293.7	297.7	1.26

Source for both: Mintel, 2015 E= Estimate F=Forecast ***CAGR** – Compound Annual Growth Rate
Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

Figure 27: Historic & Forecast Retail Volume Consumption Per Capita (population) of Spirits in Litres

Country	2010	2011	2012	2013	2014	2015E	2016E	2017F	2018F	2019F
Austria	3.21	3.30	3.38	3.40	3.16	3.03	2.99	3.04	2.99	3.04
Belgium	3.44	3.42	3.37	3.30	3.26	3.25	3.23	3.20	3.17	3.14
Denmark	2.03	2.00	2.29	2.35	2.41	2.47	2.59	2.59	2.60	2.61
Finland	4.79	4.51	4.28	3.95	3.70	3.49	3.39	3.32	3.29	3.34
France	4.64	4.62	4.44	4.40	4.38	4.36	4.35	4.35	4.36	4.35
Germany	4.63	4.71	4.67	4.65	4.59	4.52	4.49	4.45	4.42	4.38
Italy	1.17	1.16	1.10	1.07	1.04	1.03	1.03	1.04	1.05	1.06
Netherlands	3.14	3.11	3.05	2.76	2.62	2.60	2.54	2.49	2.51	2.50
Norway	2.56	2.43	2.37	2.28	2.22	2.19	2.14	2.15	2.12	2.08
Portugal	0.96	0.96	0.88	0.87	0.85	0.82	0.80	0.78	0.77	0.75
Spain	1.80	1.72	1.69	1.66	1.60	1.58	1.57	1.56	1.55	1.54
Sweden	2.18	2.05	2.03	1.96	1.89	1.91	1.88	1.81	1.75	1.69
Switzerland	1.78	1.78	1.79	1.82	1.79	1.77	1.77	1.76	1.76	1.77
Turkey	0.53	0.59	0.56	0.48	0.49	0.48	0.48	0.48	0.47	0.44
UK	3.43	3.48	3.47	3.47	3.52	3.51	3.57	3.60	3.65	3.69

Source: Mintel, 2015 E= Estimate F=Forecast ***CAGR** – Compound Annual Growth Rate
Note: This is an approximate estimation in sales as some country data wasn't available for assessment and excise taxes vary

RETAIL ENVIROMENT

The main purchasers and sellers of alcoholic drinks in Western Europe are supermarkets, hypermarkets, and on-trade business and specialist retailers. Together these channels accounted for 90.7% of all alcoholic drink sales in Western Europe (MarketLine, 2015).

NEW PRODUCT LAUNCH ANALYSIS

From January 2010 to December 2015, there were 18,601 new product launches within the alcoholic drinks category. Beer was the leading category in new product launches, with 7,135 new launches during the review period followed by the wine category with 3,912 launches, flavoured alcoholic beverages with 1,950, Liqueur with 1,669, cider with 827, and whisky with 735 launches (*See figure 28*). Of the total new product launches, 9,446 were new products, 4,101 were new packaging, 3,903 were new variety/range extensions, 219 were relaunches, and 49 were new formulations.

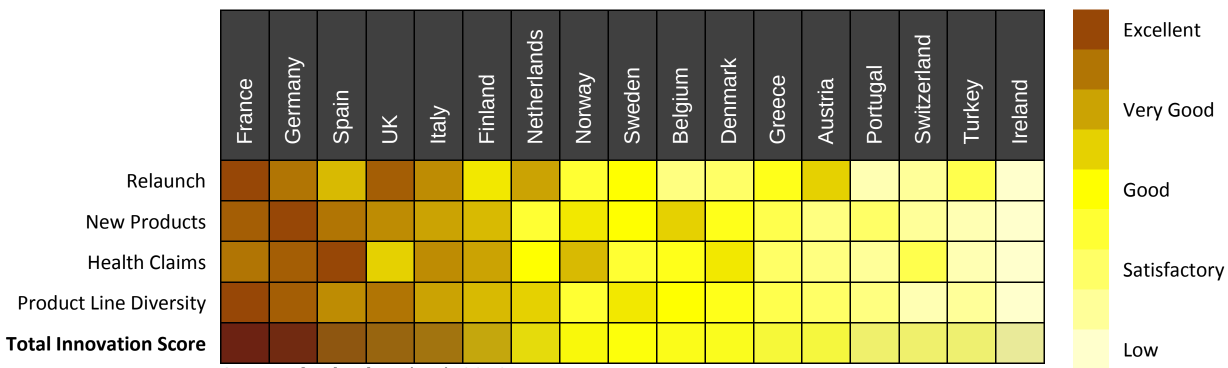
During the review period (2010 to 2015), most of the new product launches occurred in 2015 which accounted for 26.1% of the new product launches within the Western Europe region. The launch of new alcoholic drinks has been on an on-going rise with an average of 4,072 new alcoholic product launches in the last 3 three years of the review period.

The Western European countries to launch the most new alcoholic products were Germany with 3,950, France with 3,504, the United Kingdom (UK) with 2,153, Spain with 1,836, and Italy with 1,144. Of the countries to launch the most new alcoholic drinks, France, Germany, and Spain are excellent Western European markets at launching the most innovative alcoholic drinks (please see examples on page 17-21). These markets are innovative as they launched a diverse amount of alcoholic drinks that were ranked high in each of the four innovation criterions (*See figure 29*). In addition to launching the most relaunches and new products, they had the most instances of health claims in comparison to other countries such as Ireland, Turkey, and Switzerland.

Figure 28: New Product Launches of Alcoholic Drinks by Category in Western Europe

Category	New Product Launched
Total Alcoholic Drinks	18,601
Beer	7,135
Wine	3,912
Flavoured Alcoholic Beverages	1,950
Liqueur	1,669
Cider	827
Whisky	735
Vodka	658
Fortified & Other Wines	446
Gin	377
Brandy	326
Dark Rum	232
White Rum	180
Other Spirits	106
Tequila	48

Figure 29: Top Innovative Alcoholic Drinks Market



Source for both: Mintel, 2016

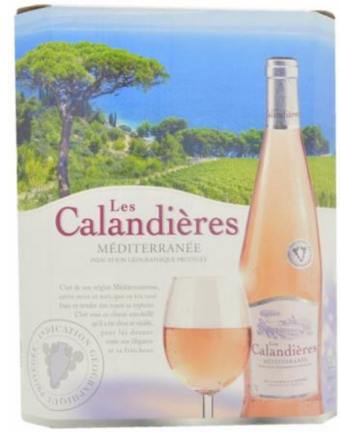
Figure 30: New Product Launches of Alcoholic Drinks in Western Europe

Feature*	Yearly Launch Counts					
	2010	2011	2012	2013	2014	2015
Yearly Product Launches	1785	2130	2469	3306	4061	4850
Top 5 Claims						
Ethical - Environmentally Friendly Package	225	0	265	413	526	722
Premium	0	244	263	337	425	481
Organic	0	110	164	272	279	360
Limited Edition	112	0	181	160	232	230
Seasonal	0	142	148	149	247	215
Top Growing Claims						
Cobranded	2	9	7	8	17	19
Kosher	6	7	16	9	23	26
Gluten-Free	10	12	26	37	51	66
GMO-Free	0	5	5	8	12	10
Male Oriented	0	1	1	0	0	5
Top Declining Claims						
Immune System (Functional)	0	0	0	0	0	4
Other (Functional)	1	2	2	3	3	10
Low/No/Reduced Fat	0	0	3	0	0	0
Economy	10	17	27	14	12	21
Low/No/Reduced Carb	0	0	0	0	8	0
Imported Status						
Imported	1	0	0	413	895	1067
Not Imported	0	0	0	359	628	735
Top 5 Ingredients**						
Barley Malt	319	381	526	798	960	1294
Hops	299	352	441	787	997	1236
Yeast	133	145	167	437	560	725
Food Acids	175	222	223	337	334	368
Citric Acid	132	164	176	285	260	259
Top 5 Packaging Type						
Bottle	1402	1723	1992	2680	3282	3909
Can	203	221	292	302	359	458
Flexible	7	24	21	34	23	28
Carton	20	25	21	19	19	21
Flexible stand-up pouch	3	17	13	37	11	37
Top 5 Packing Material						
Glass coloured	661	781	1023	1467	1829	2167
Glass plain	629	880	905	1166	1378	1642
Metal aluminium	189	197	273	276	349	436
Plastic PET	48	44	48	36	51	57
Metal steel	20	32	32	35	26	29
Top 5 Companies						
Lidl	15	39	29	50	73	76
Heineken	19	24	30	33	39	76
Aldi	23	73	49	11	18	35
Carlsberg	11	21	20	19	40	51
InBev	17	24	29	26	26	22

Source: Mintel, 2016
***Note**: rankings are based on 2010-2015 data
****Note**: the totals for the ingredient counts will add to more than the total launches, as products can use multiple ingredients

NEW PRODUCT EXAMPLES

Mediterranean Rosé Wine



Record ID:	4257917
Company:	Castel Frères
Brand:	Les Calandières
Category:	Alcoholic Beverages
Sub-Category:	Wine
Country:	France
Country of Manufacture:	France
Import Status:	Not imported
Store Name:	Intermarché
Store Type:	Supermarket
Store Address:	Baignes-Sainte-Radegonde 16360
Date Published:	Sep 2016
Product source:	Shopper
Launch Type:	New Packaging
Price in local currency:	€12.06
Price in US Dollars:	13.16
Bar Code:	3175529640451

Product Description

Les Calandières Méditerranée Vin Rosé (Mediterranean Rosé Wine) has been repackaged in a newly designed, recyclable 3L bag-in-box format, providing up to 30 glasses and equivalent to 4 x 75cl bottles. The product features a protected geographical indication and is said to have elegance and freshness, with a pale dress, rose petal reflections and a floral and fruity nose. It is described as fresh and tender, with flavours of orchard fruits and citrus notes, making it an ideal accompaniment to light dishes, fish or salads and deli dishes, or as an aperitif.

2014 Organic Rosé

Record ID:	3636305
Company:	Peter Mertes
Brand:	BIOrebe
Category:	Alcoholic Beverages
Sub-Category:	Wine
Country:	Germany
Country of Manufacture:	Germany
Import Status:	Not imported
Store Name:	tegut
Store Type:	Supermarket
Store Address:	Stuttart 70173
Date Published:	Dec 2015
Product source:	Shopper
Launch Type:	New Variety/Range Extension
Price in local currency:	€3.49
Price in US Dollars:	3.87
Bar Code:	4003301089923

Product Description

BIOrebe Bio Rosé 2014 (2014 Organic Rosé) is a lovely quality wine, pressed from red grapes. A whiff of fruity blueberries dominates its fine flavour. This wine can be enjoyed with light cuisine and by purchasing this organic wine, the cultivation of vines grown under the provisions of the EU regulation on organic production are supported, thereby protecting the environment and its natural resources. It is suitable for vegans and vegetarians, and retails in a 75cl resealable and recyclable bottle which features a QR code, the European Vegetarian Union V-label seal, and the Protected Designation of Origin, EU Green Leaf and Bio logos.

Organic Spelt Wheat Beer

Record ID:	3524203
Company:	Weissbräu Unertl
Brand:	Unertl
Category:	Alcoholic Beverages
Sub-Category:	Beer
Country:	Germany
Store Name:	NORMA
Store Type:	Supermarket
Store Address:	Augsburg 86154
Date Published:	Dec 2015
Product source:	Shopper
Launch Type:	New Variety/Range Extension
Price in local currency:	€6.47
Price in US Dollars:	7.61
Bar Code:	4260011150149

Product Description

Unertl Bio-Dinkel Weisse (Organic Spelt Wheat Beer) has been added to the range. The product is said to be made only with the best raw materials from local regions and water from the brewery's very own well. This Bioland certified organic product retails in a pack of six 0.5L bottles featuring the EU LEaf logo and the Beer with Alternative Grains Gold Award from 2005 to 2008.

Gluten Free Organic Beer

Record ID:	3557671
Company:	Brasserie Grain D'Orge
Brand:	Grain d'Orge
Category:	Alcoholic Beverages
Sub-Category:	Beer
Country:	France
Store Name:	Carrefour
Store Type:	Mass Merchandise/Hypermarket
Store Address:	Cesson Sevigne 35510
Date Published:	Nov 2015
Product source:	Shopper
Launch Type:	New Packaging
Price in local currency:	€2.99
Price in US Dollars:	3.31
Bar Code:	3347970011221

Product Description

Grain d'Orge Bière Bio sans Gluten (Gluten Free Organic Beer) has been repackaged. This organic certified product comprises a pure malt blond beer, which is free from gluten and retails in a 75cl bottle featuring the EU Green Leaf and AB logos.

Océane First Drinking Beer with Biodynamic Malt

Record ID:	3360781
Company:	La Mousse à Zigui
Brand:	La Mousse à Zigui
Category:	Alcoholic Beverages
Sub-Category:	Beer
Country:	France
Store Name:	Naturalia
Store Type:	Natural/Health Food Store
Store Address:	Puteaux 92800
Date Published:	Aug 2015
Product source:	Shopper
Launch Type:	New Product
Price in local currency:	€3.99
Price in US Dollars:	5.04
Bar Code:	3770005652012

Product Description

La Mousse à Zigui Océane Malt en Biodynamie Première Bière à Boire (Océane First Drinking Beer with Biodynamic Malt) is said to be ideal when paired with dishes made from sea or river products. The organic certified product retails in a 33cl pack featuring the EU Green Leaf logo.

Berry & Cucumber Alcohlic Iced Tea

Record ID:	3528845
Company:	Tudor Drinks
Brand:	Harry Brompton's
Category:	Alcoholic Beverages
Sub-Category:	Flavoured Alcoholic Beverages
Country:	UK
Country of Manufacture:	UK
Import Status:	Not imported
Store Name:	Ocado
Store Type:	Internet/Mail Order
Date Published:	Dec 2015
Product source:	Shopper
Launch Type:	New Variety/Range Extension
Price in local currency:	£2.00
Price in US Dollars:	3.20
Price in Euros:	2.72
Bar Code:	5060346830063

Product Description

Harry Brompton's Berry & Cucumber Alcoholic Iced Tea is handmade in limited batches. According to the manufacturer, this is the world's first premium alcoholic iced tea and is described as lightly sparkling. The product is made with the finest hand picked Kenyan black teas, craft-distilled vodka and gently infused with natural raspberry, cranberry and cucumber flavours. It contains no artificial colours, flavours, preservatives or gluten, and retails in a 275ml bottle featuring the Twitter link.

Herbal Liqueur

Record ID:	3699103
Company:	Dilmoor
Brand:	Amaro del Castello
Category:	Alcoholic Beverages
Sub-Category:	Liqueur
Country:	Italy
Store Name:	Supermercati Tigros
Store Type:	Supermarket
Store Address:	Milano 20125
Date Published:	Dec 2015
Product source:	Shopper
Launch Type:	New Product
Price in local currency:	€3.90
Price in US Dollars:	4.32
Bar Code:	8004180724017

Product Description

Amaro del Castello Liquore d'Erbe (Herbal Liqueur) has been made according to an original recipe, and has been infused with herbs. The product can be enjoyed after a meal, as a tantalizing appetizer, or warm with a lemon peel. Its flavour is described as pleasant and harmonious, and it retails in a 70cl bottle.

Mango, Mint & Whisky

Record ID:	4276345
Company:	Easier Sales
Importer:	Easier Sales
Brand:	Fine Cocktails
Category:	Alcoholic Beverages
Sub-Category:	Flavoured Alcoholic Beverages
Country:	UK
Country of Manufacture:	France
Import Status:	Imported product
Date Published:	Sep 2016
Product source:	Trade Show
Launch Type:	New Product
Price in local currency:	£4.99
Price in US Dollars:	7.43
Price in Euros:	6.80
Bar Code:	5012461004263

Product Description

Fine Cocktails Mango, Mint & Whisky is made with pasteurised natural fruit juice and natural flavouring. This drink is free from artificial colours and preservatives, is ready to be enjoyed, and retails in a 200ml pack. This product was on display at the Speciality & Fine Food Fair 2016 in Olympia, London.

Organic Vodka

Record ID:	3043785
Company:	Runa Vodka
Brand:	Runa
Category:	Alcoholic Beverages
Sub-Category:	Vodka
Country:	Sweden
Store Name:	Systembolaget
Store Type:	Specialist Retailer
Store Address:	Gothenburg 411 05
Date Published:	Mar 2015
Product source:	Shopper
Launch Type:	New Product
Price in local currency:	SEK377.00
Price in US Dollars:	47.28
Price in Euros:	36.51
Bar Code:	7350066760244

Product Description

Runa Organic Vodka is described as a mild vodka with a clean taste and a hint of wheat. This Swedish product retails in a 700ml bottle.

Organic Fins Bois Single Cru Cognac

Record ID:	2111536
Company:	Cognac Park
Brand:	Park Cognac
Category:	Alcoholic Beverages
Sub-Category:	Brandy
Country:	France
Country of Manufacture:	France
Import Status:	Not imported
Date Published:	Jul 2013
Product source:	Trade Show
Launch Type:	New Product

Product Description

Park Cognac Organic Fins Bois Single Cru Cognac is retailed in a 700ml bottle. This product was on display at the Vinexpo, Bordeaux 2013.

FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in**
  www.tradecommissioner.gc.ca/

- **Find a Trade Commissioner**
  www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

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For additional information on Salon International de l'Alimentation (SIAL) 2016, please contact:

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  Agriculture and Agri-Food Canada
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RESOURCES

Euromonitor International, 2016.

Global Trade Tracker, 2016.

MarketLine Industry Profile, Global Alcoholic Drinks, July 2015.

Mintel Market Sizes, 2015.

Mintel Global New Products Database, 2016.

Sector Trends Analysis
WINE, BEER, AND SPIRITS IN WESTERN EUROPE
Global Analysis Report

Prepared by: Ranna Bernard, Market Analyst

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