ORGANIC WINE ON GERMAN MARKET

Dr. Hermann Pilz
Chief Editor WEINWIRTSCHAFT
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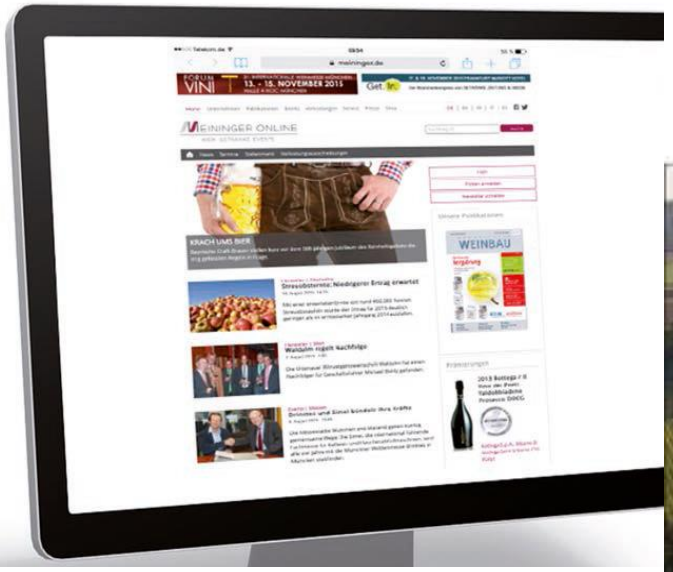

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* IVW è l'organo tedesco per il controllo della tiratura dei mezzi pubblicitari.

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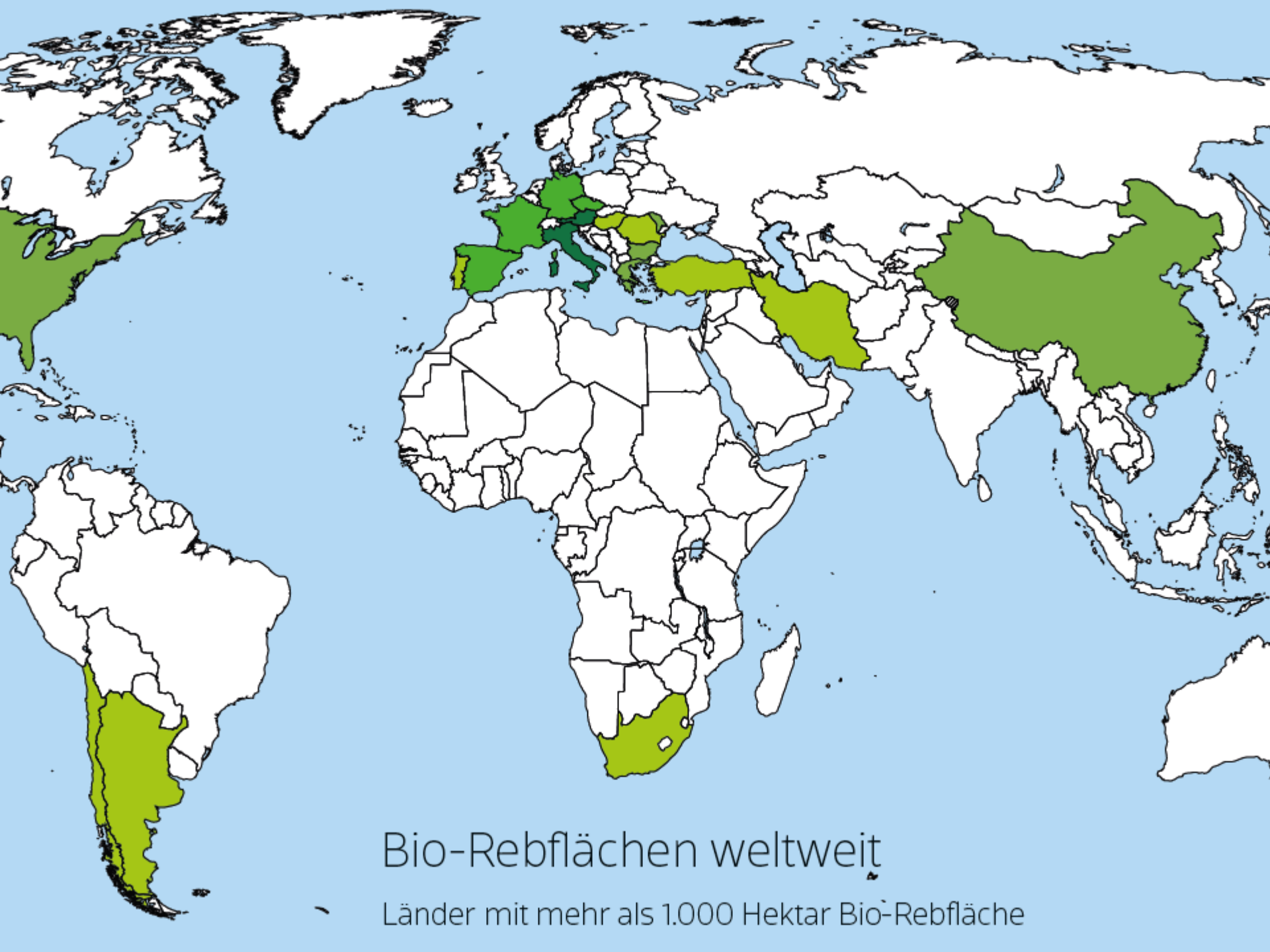
1.
Organic Wine Production and Offers

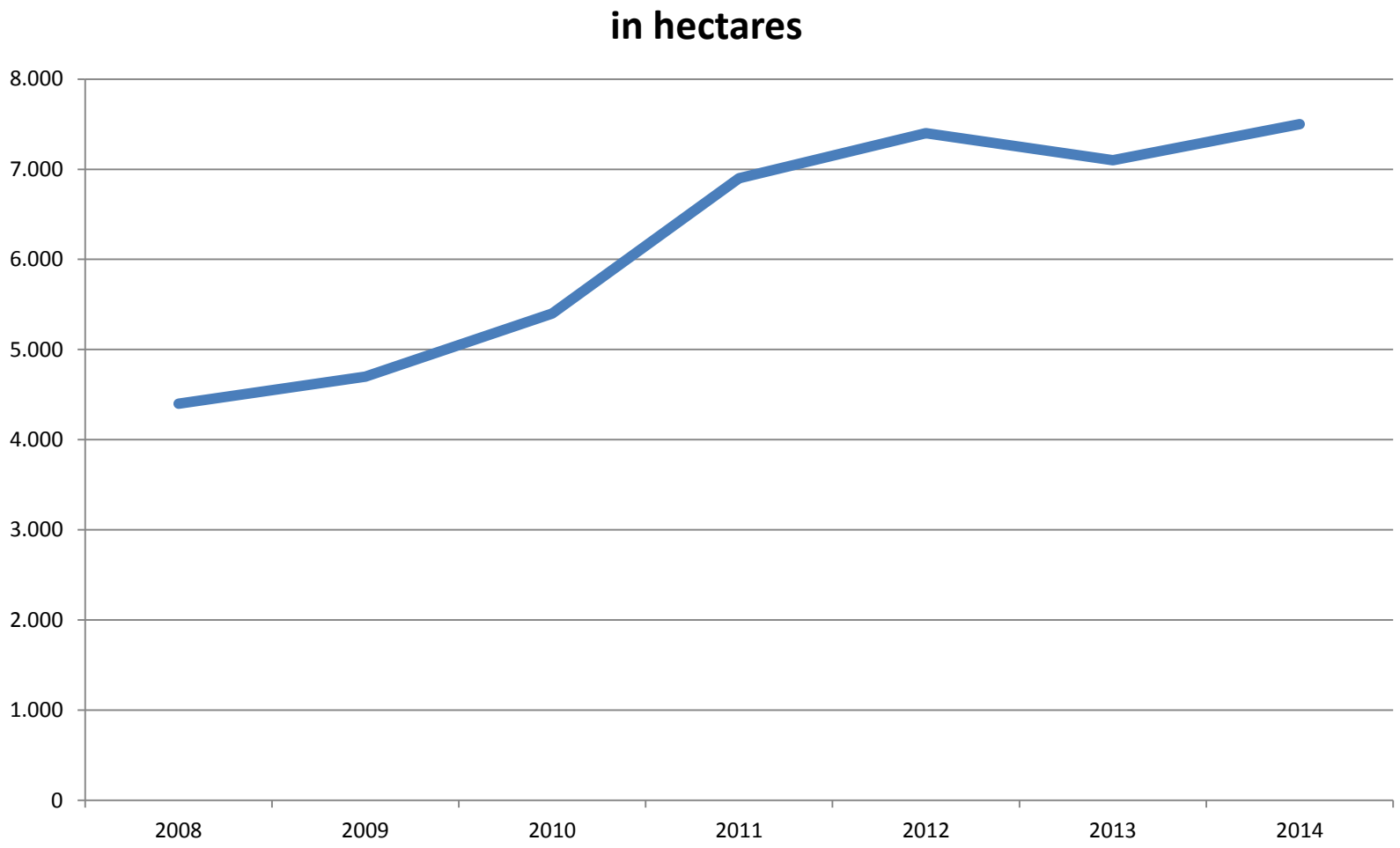

Bio-Rebflächen weltweit
Länder mit mehr als 1.000 Hektar Bio-Rebfläche

World Organic Vineyard Areas

World Organic Vineyard Area			
	Organic vineyard area (ha)	Percentage share of total vineyard area	Trend 2014/2013
Spain	84.381	8,9	↔
Italy	72.361	10,4	↑
France	66.210	8,4	↑
Germany	7.500	7,5	↔
Austria	4.677	10,7	↑
Moldawia	4.641	4,6	↑
Greece	4.388	7,2	↓
Bulgaria	2.914	4,8	↓↓
Portugal	2.772	1,5	↑
USA	15.647	4,1	↔
Chile	3.740	1,8	↔
Argentinia	3.466	1,7	↓↓
New Zealand	2.500	7,4	↑
South Africa	1.156	0,9	↑
World	**319.568**	**4,6**	**2 %**

State: December 2014
Source: FiBL (Forschungsinstitut für biologischen Landbau, Suisse), European Commission und Research of WEINWIRTSCHAFT

Organic Vineyard Areas Germany



Quelle: WEINWIRTSCHAFT 2016

Situation 2015

- Since 2007, the area of German organic vineyards has nearly **doubled**
- 2012: **7.500 ha – 7.5%** of all Germany's vineyards
- A total of **700 organic wineries – 3.7%** of all wineries

Association	Businesses	Size (ha)
ECOVIN	250	1,900
Bioland	126	1,025
VDP	49	980
Demeter	47	450
Naturland	34	285
Biokreis	2	31
EU-certified	X	2,730

WEINWIRTSCHAFT 2016, According to the associations and AMI 2014/2015

Calculation on German Market: Model Calculation

8,000 hectares of organic vineyards
(corresponds to 8% of the entire German vineyard area)

Number of organic wineries:
700

German production[1]:
600,000 HL
(50%)

Organic wine market in Germany: 1,200,000 HL

Imports[2]:
600,000 hl
(50%)

Percentage of entire German wine market: **7,0%**

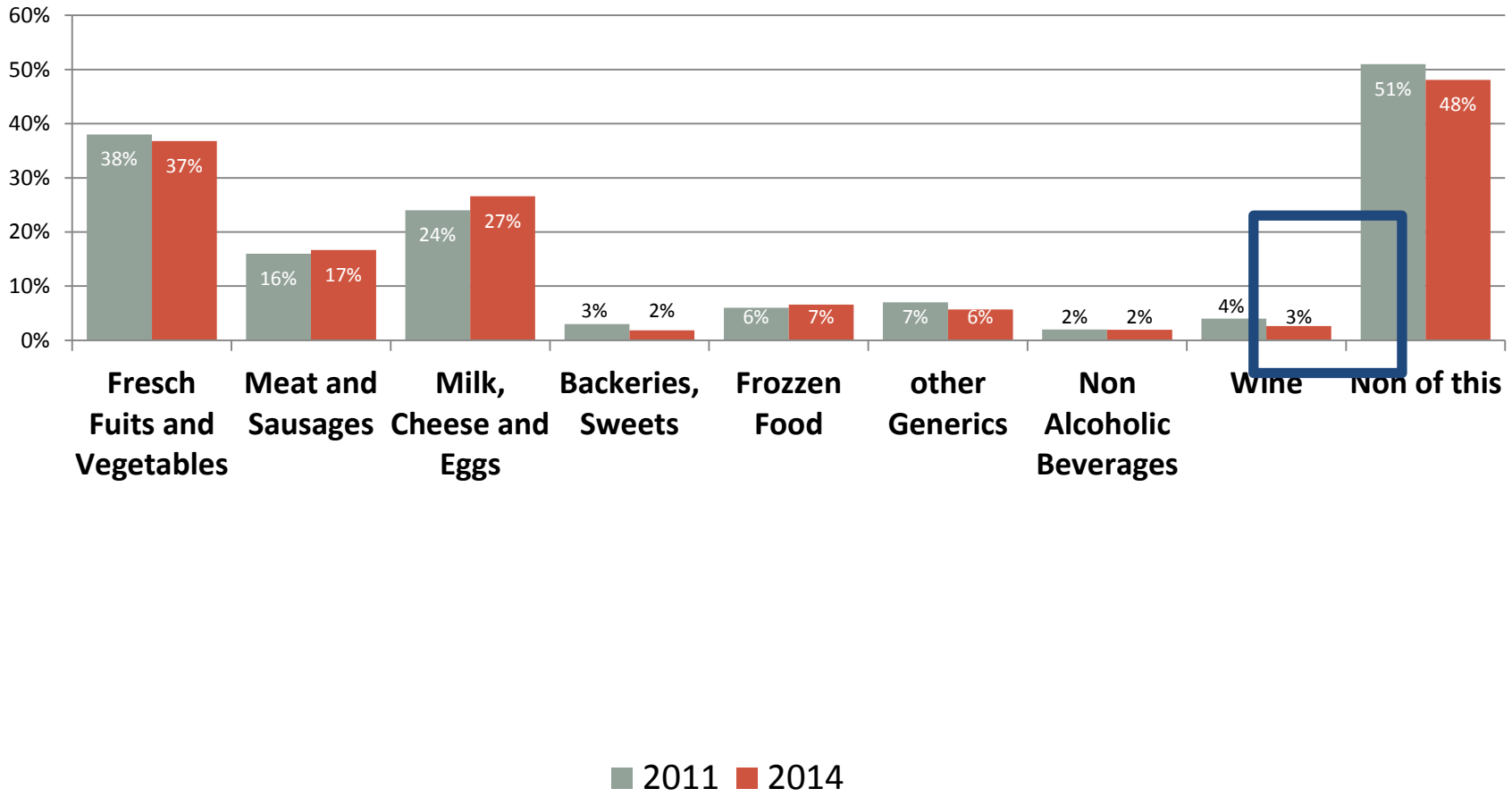
Consumption per head in litres in Germany:
approx. 1.45 litre/head

1: Estimate: Hochschule Geisenheim University; 2: Weinwirtschaft 2015/2, p. 50-52

2.
German Organic Wine - Consumers

Regularly Purchased Products with Organic Seal

n=1225/1322

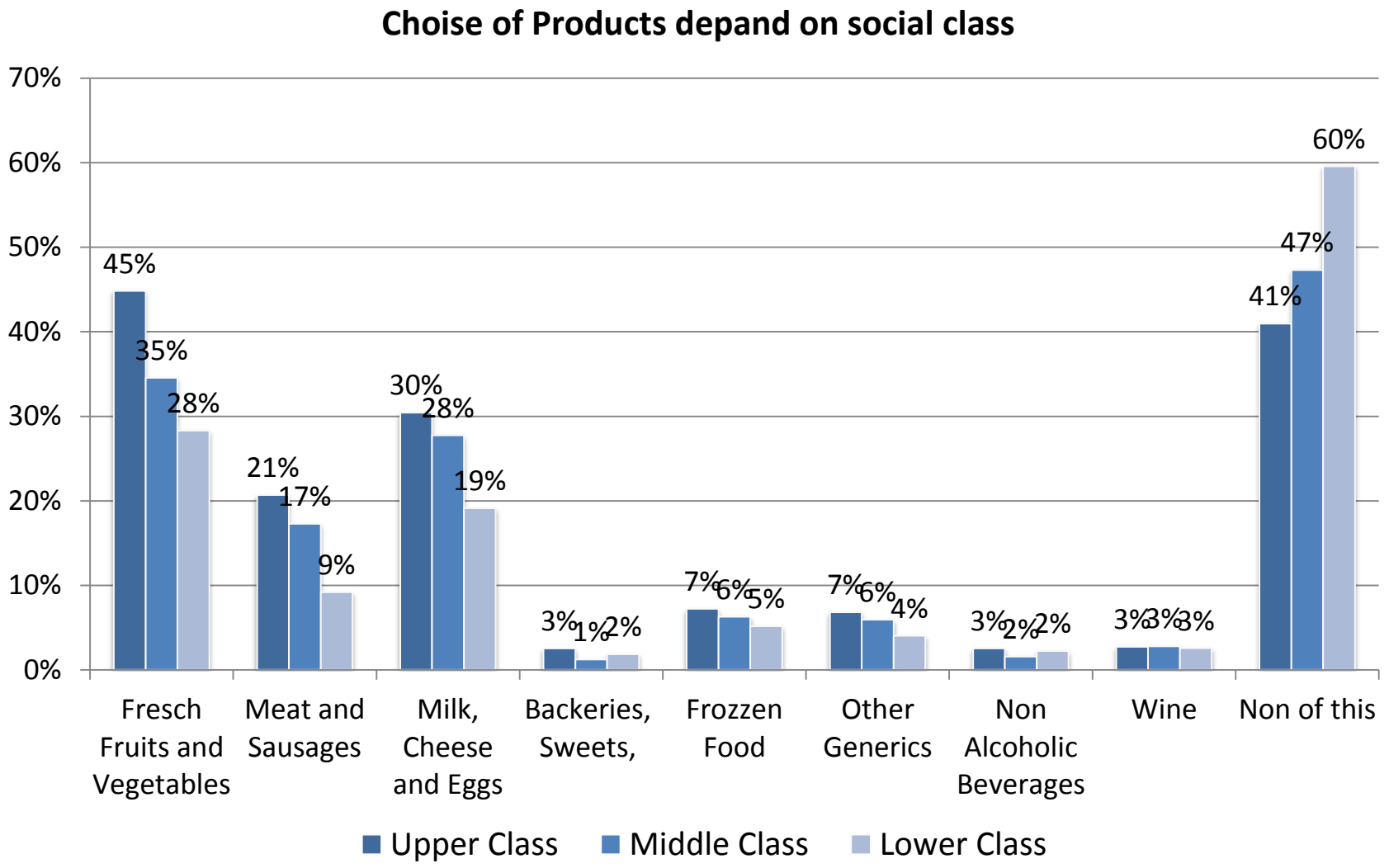


- Small changes – similar structure
- Fruit, vegetables, dairy products, eggs and meat are ahead

Hoffmann & Szolnoki, 2010

Regularly Purchased Organic Products acc. to Social Class

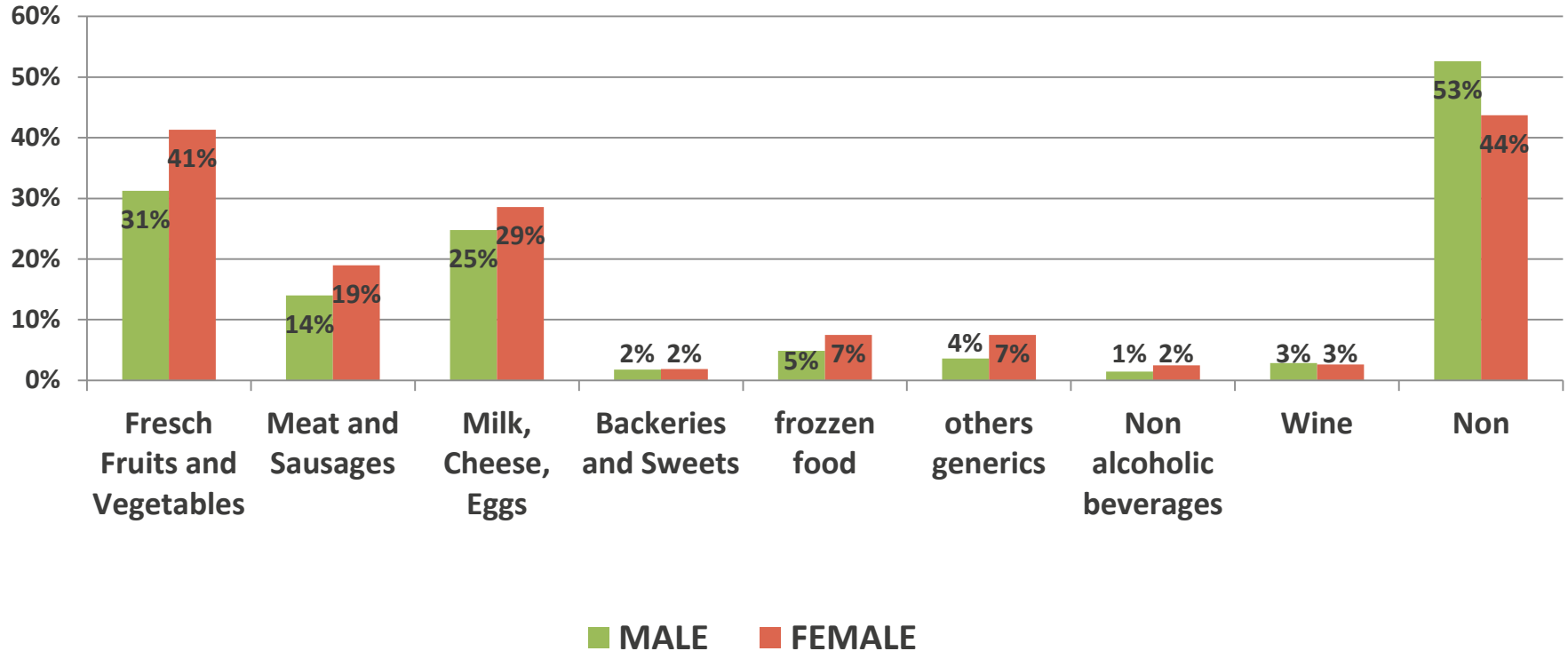
n=1322



- More organic products in the upper classes

Regularly Purchased Organic Products acc. to Gender

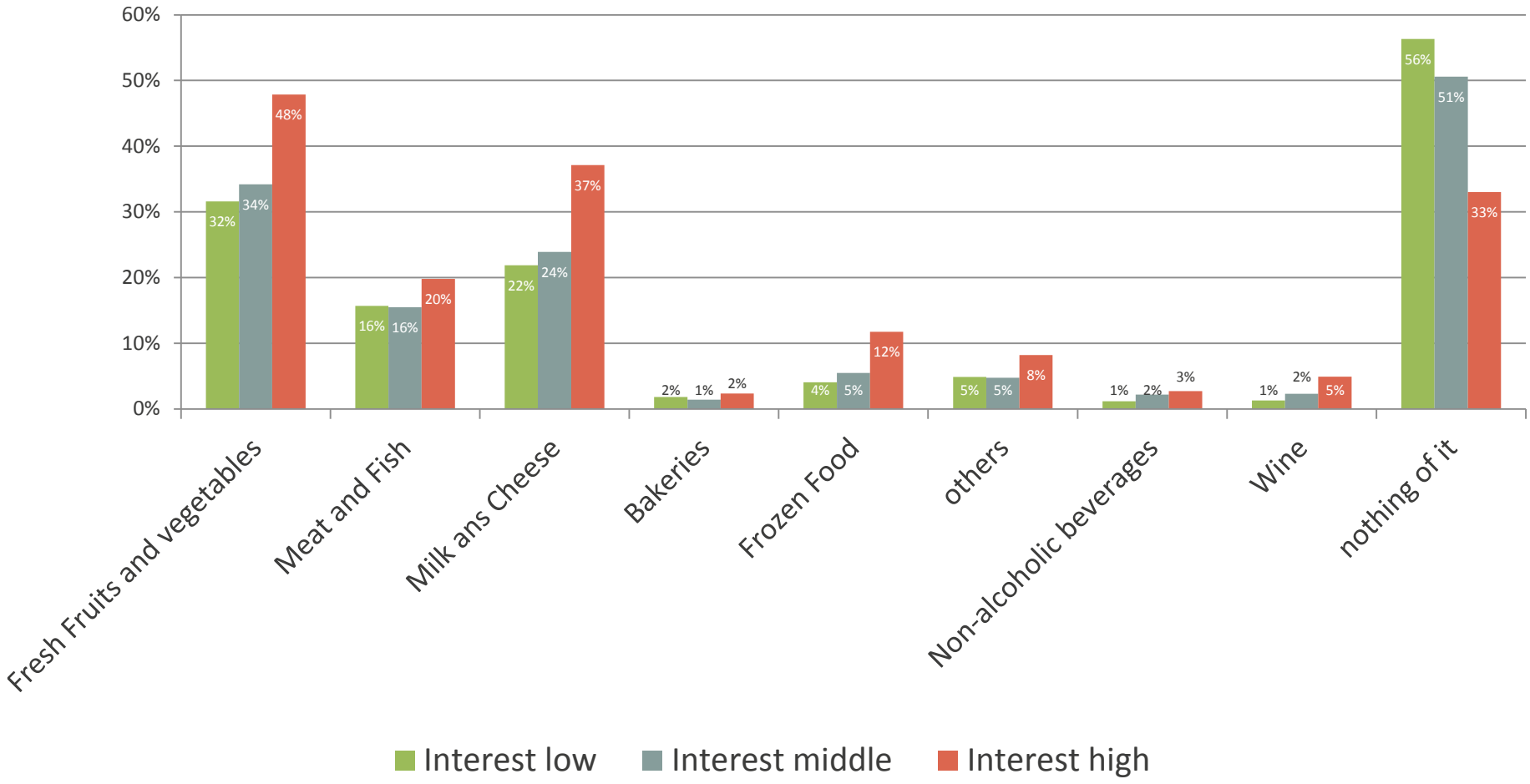
n=1322



- Women buy more organic produce

Regularly bought Organic products by interest on wine

n=1322



- Mehr Interesse an Wein -> mehr Bio-Produkte

Purchase Frequency of Organic Wine

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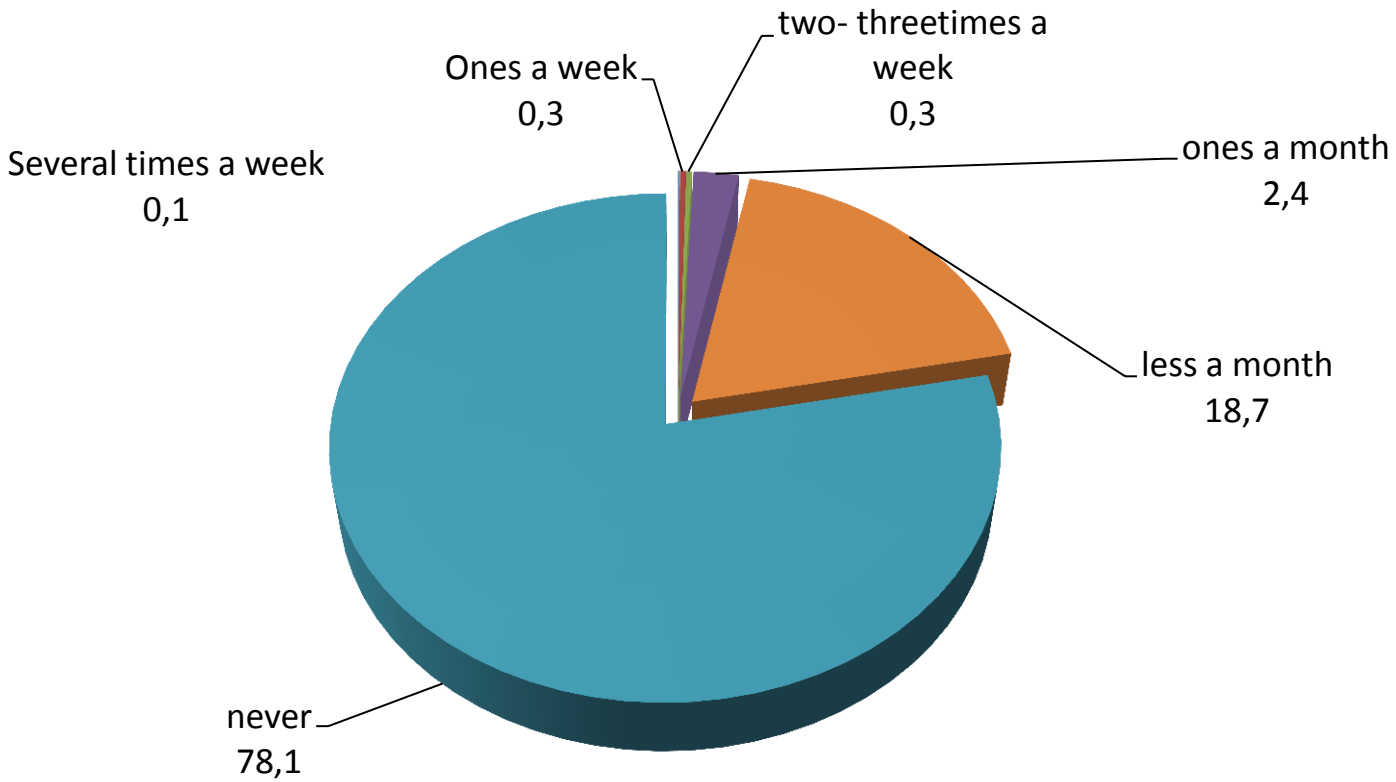


- 22% of wine drinkers (8.9 million) **deliberately** buy organic wine now and again
- 78% of wine drinkers (31.8 million) do not

Comparison of Wine Consumers

Non-organic wine purchasers

78% of wine drinkers

31.8 million consumers

Organic wine purchasers

22% of wine drinkers

8.9 million consumers

Summary

In General

- **Positive developments in the organic sector in the past five years**
- **Positive image of organic products in the minds of consumers**
- **High proportion of organic products in Germany**
- **Organic wine – higher social classes**

Specific on Wine

- **Only 3% regularly buy organic wine**
- **18% buy organic wine less than once a month**
- **Consumers' attitude: "100% natural"**
- **More and more wineries are converting to organic**
- **Approx. 8000 ha. organic vineyards**

3.
Organic Wine Trade and Structure

Current Situation

- The **German market** for organic foods is the **biggest** in Europe
- 2014 sales of organic food: **8,62 billion euros**
- German **eco-area 2015: 1,077,950 ha.** (+ 2,9% compared to last year)
- Number of **organic farms: 24,343** (4% of the total agriculture)
- 2014 -> 2015 German households spent **11% more** on organic food
- **Constant changes** in the market and the consumers
- **Food retailers** and **discounters** offer organic food in a variety of product groups
- **Target group** has expanded and is more **difficult to narrow down**

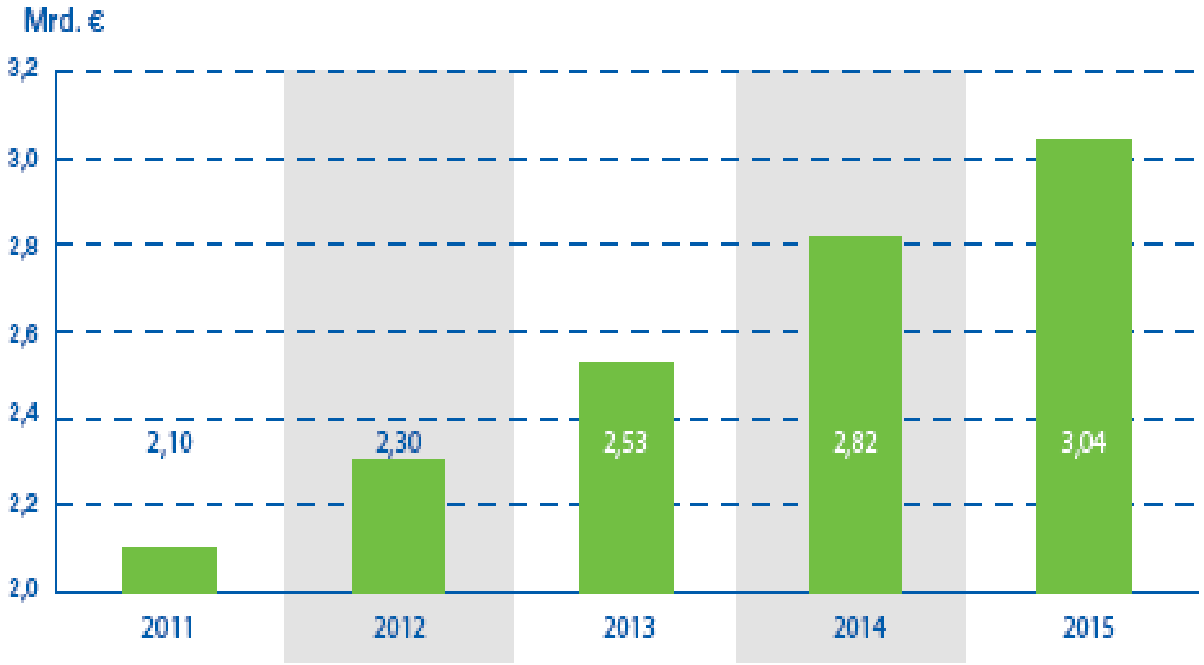
BÖLW 2015

Retail Stores: Where to buy?

Sales of organic food by trade channel	Sales 2015	Percentage 2015	Growth
	Billion €	%	%
Supermarkets / Grocery Stores (incl. Disocunt)	4.76	55%	13,2%
Organic Grocery Stores	2,71	31%	10,0%
Other	1.15	13%	5,6%
Total	8,62	100%	11,1%

BÖLW,2014

Organic Grocery Stores in Germany break 3 Bill. Euro



Gesamtmarktentwicklung Naturkostfachhandel*
2011 - 2015 (in Mrd. €)

Quellen: Projekt Marktdaten Naturkostfachhandel 2011; BNN Umsatzmonitoring 2014/15

*inkl. Non-Food

Discount Special Offer: Bio Wine from Abruzzo

Discounter:
Aldi Süd
Aldi Nord
Lidl
Netto
Penny
Norma

[Bio Montepulciano d´ Abruzzo DOC trocken - vegan](#)
Italien
Rotwein, trocken
Flasche 0,75 l
(2,92*/l)

2,19*
Netto

[Bio Trebbiano d´Abruzzo DOC trocken - vegan](#)
Italien
Weißwein, trocken
Flasche 0,75 l
(2,92*/l)

2,19*
Netto

Aldi Süd

Lidl

Dennree

- Handelshaus mit Sitz in Töpen/Bayern mit automatisiertem Lager mit 70.000 qm Fläache
- Gründung 1972 von Thomas Greim in Oberfranken als 1 Mann-Unternehmen, der Milch, Obst, Gemüse ausfuhr
- Heute Handelshaus mit 3.500 Mitarbeiter
- 8 regionale Niederlassungen in Deutschland
- Weitere Niederlassungen in Österreich und Luxemburg
- Belieferung von über 1.300 Naturkostfachgeschäften
- 190 eigene Lkw
- Sortiment: 12.000 Artikel (Weine von Peter Riegel)
- Über 200 eigene Bio-Supermärkte unter dem Label denns

Denns

Das umfangreiche denn's Biomarkt-Sortiment

Alles auf einen Blick. Bio in seiner ganzen Vielfalt: Obst und Gemüse, Fleisch-SB und Wurst, Molkereiprodukte und Käse, Tiefkühlkost, Trockensortiment, Nahrungsergänzungsmittel, Reformwaren, Babykost, regionaler Bäcker mit Brot & Backwaren, inklusive Cafébar und Bistro

Getränke

Saft und Wasser

Wein und Bier

Textil

Naturtextilien für Babys, Kinder, Damen und Herren

Naturkosmetik

Sonstiges

freiverkäufliche Arzneimittel

Alnatura

Alnatura Handelsunternehmen

Gegründet: 1984 (Dr. Götz Rehn)

Geschäftsidee: (1986) Shop in Shop-System bei DM (Drogeriemärkte) u. Tegut (heute Migros)

Partner: Edeka, Globus, DM, Coop, Billa (A), Merkur (A), Sutterlüty (A) MPreis (A), Budni, Migros (CH), Alnatura in 8.950 Filialen

Outlets: über 100 Filialen in 46 Städten (1987 erster Markt)

Eigensortiment: 1.250 Bio-Artikel unter der Marke Alnatura, Food + NonFood, Getränke

Wein: Alantura Edition (Peter Riegel)

Umsatz: 800 Mill. Euro

Mitarbeiter: 2.530

Basic Bio-Supermärkte

Weiß, Rot oder Rosé
LANDPARTIE Je 0,75-Ltr.-Flasche
3,99 € (1 Ltr. = 5.32€)
Secco
LANDPARTIE 0,75-Ltr.-Flasche
4,99 € (1 Ltr. = 6.65 €)

Basic
Gründer: Bio-Pioniere Georg Schweisfurth, Richard Müller, Johann Priemeier und Hermann Oswald

Bio-Markt-Kette: gegründet 1992
Filialen: 35 Bio-Supermärkte in 17 Städten

Sortiment: 12.000 Artikel von Food bis Kosmetik, eigene Molkereiprodukte

Wein: Kooperation mit La Selva (12 eigene Weine), neu deutsche Weine

Peter Riegel Biowein

Peter Riegel Weinimport GmbH Orsingen (Bodensee)

Gegründet: 1985 (als ein-Mann-Unternehmen) von Peter Riegel Familie)

Partner: Alnatura, Dennree, Edeka, Rewe, LEH (D und A), u.a., gesamter Naturkosthandel

Tochterunternehmen: Bionysis GmbH (Mack & Schühle), Dschinn GmbH & Co. KG)

Sortiment: 1.100 Weine, Spanien(32), Italien (22), Frankreich (15), Deutschland (13, Eigenmarken (7), andere (6)

Weingut: Mas de Quernes (Südfrankreich)

Umsatz (2015): 32 Mill. Euro

Mitarbeiter: 75

Specialist Organic Wine Trader

Delinat

- Gegründet 1980 von Karl Schefer,
- Sitz in Basel/Schweiz, Niederlassung in Deutschland,
- Sortiment: 250 Winzerweine 6,40 bis 78 CHF, Spirituosen, Feinkost
- Versandhandel in der Schweiz und Deutschland
- Eigene Produktrichtlinien
- Mitarbeiter: 40

Naturian

- Gegründet 1992 (seit den 1980 Weinhandel)
- Wein-Großhandel in Fuldabrück
- Sortiment: International, Deutschland , Italien, Frankreich, Übersee, eigene Ausstattungen
- Partner für Naturkostläden, Weineinzelhandel, Gastronomie bis SEH

Thank you