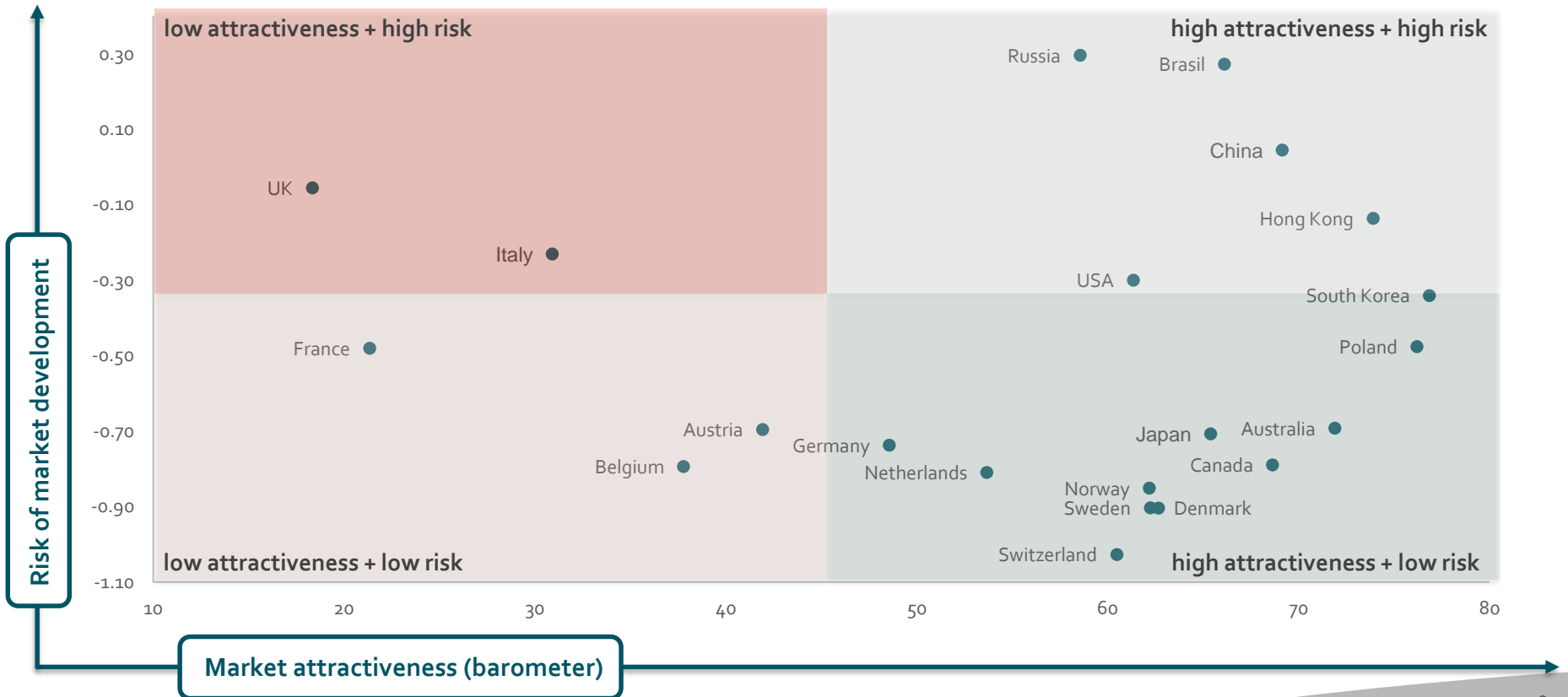


Risk and market attractiveness

Market attractiveness (barometer) vs. risk of market development



Current and new wine sales markets

Current sales markets

% currently distribute wine in the following markets (top 5)

Base: All producers (n=429)

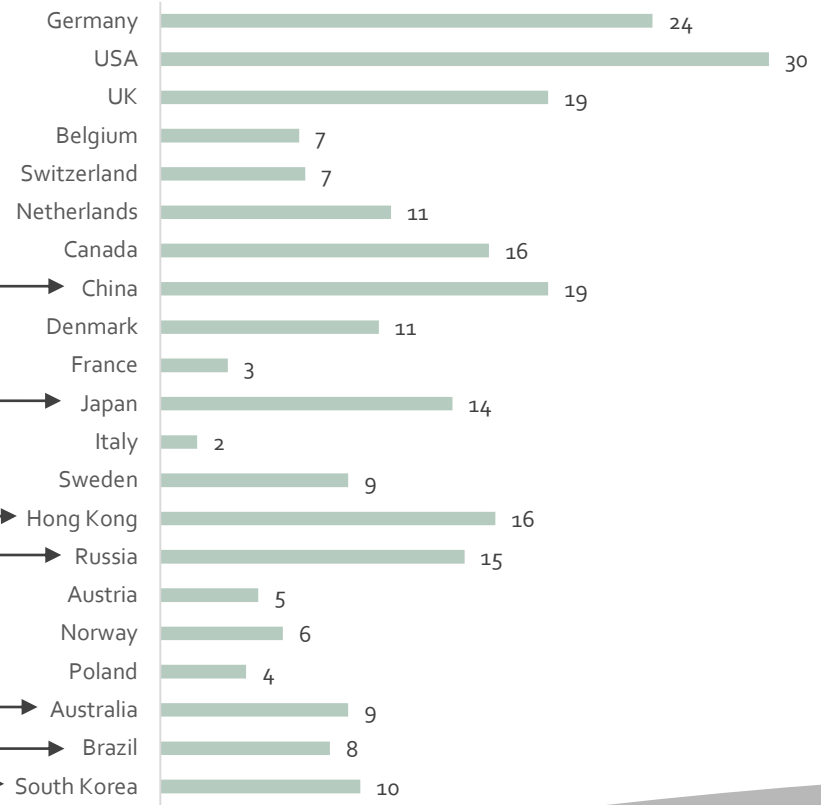


Markets where relative to current importance many new companies enter and expand their export business.

New sales markets by 2020

% plan to expand their export activities to the following markets (top 3)

Base: All producers, which plan to expand their export activities (n=336)

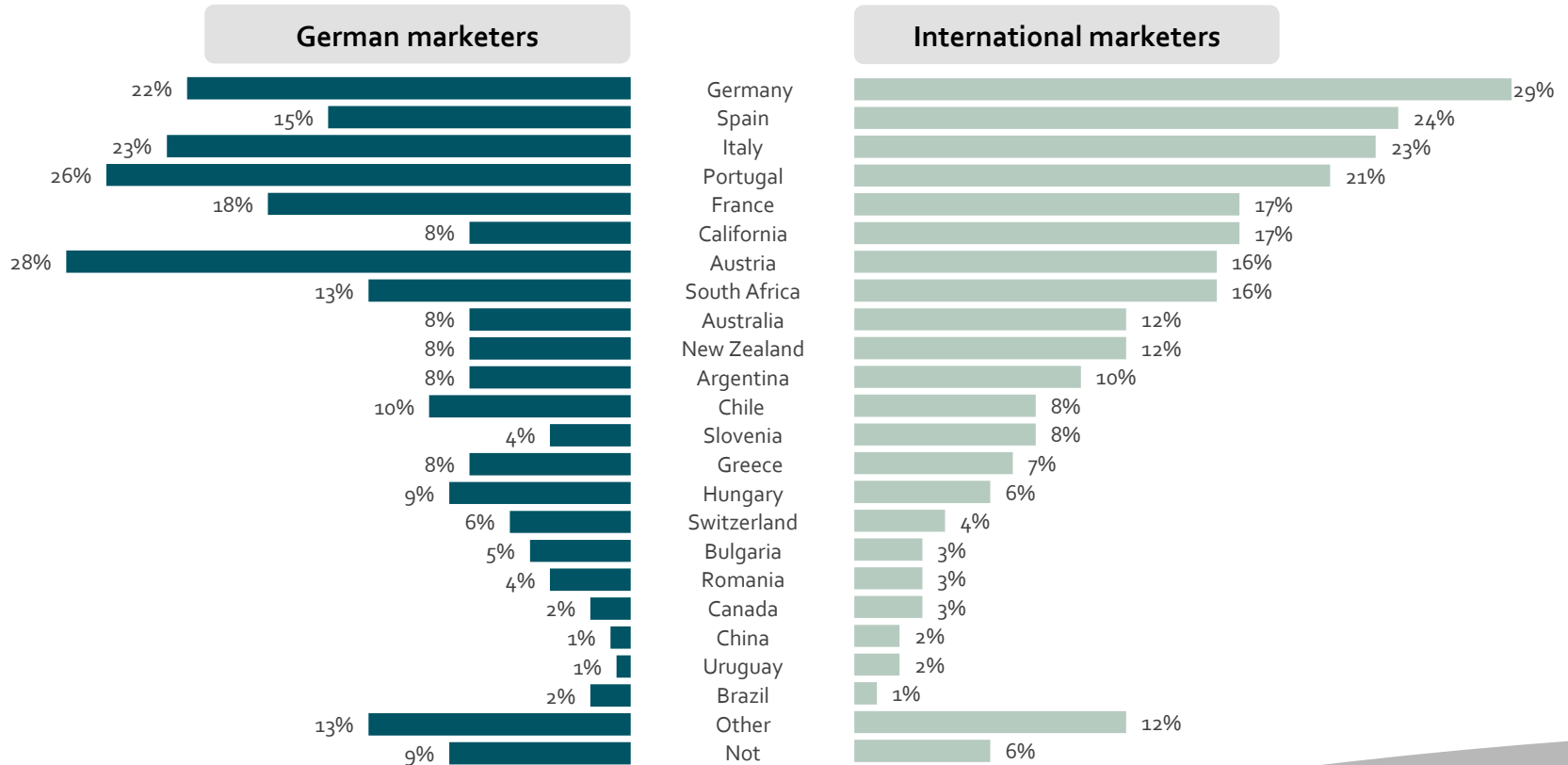


Sought after wine origins

Expansion in wine range to new countries of origin

% of marketers plan to expand their wine range to the following countries of origin by 2020

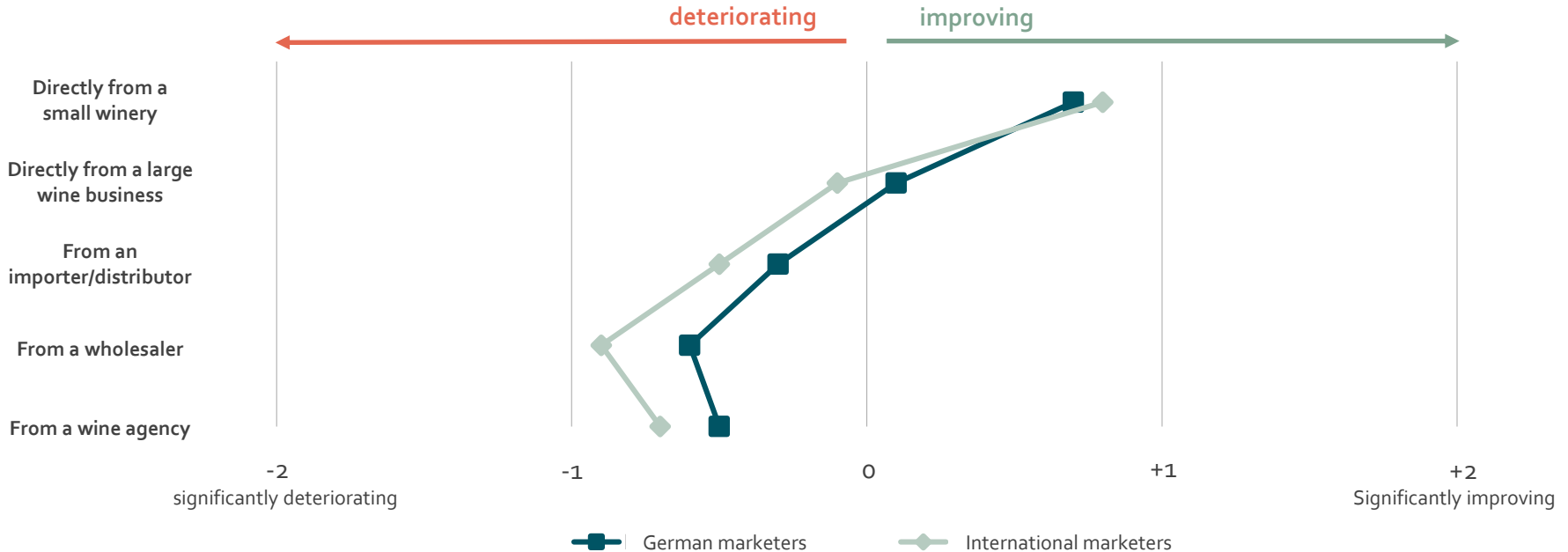
Base: All marketers, which plan to expand their wine range by 2020 (n=159 German marketers, n=270 international marketers)



Development of importance of purchase channels

% of marketers are of the opinion, that the importance of the following purchase channels will change as follows for their company by 2020

Base: All marketers (n=481 German marketer, n=422 international marketers)



- Direct channels (directly from a small winery, directly from a large wine business) will increase in importance or stay unchanged.
- Indirect wine sourcing channels are expected to decrease in importance by 2020.

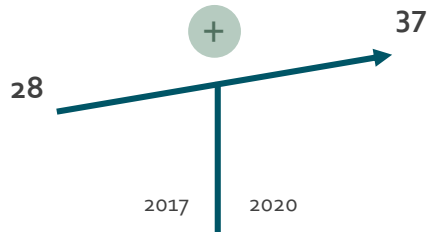
Sales channels in the US from producer perspective

Current importance of different sales channels in the US

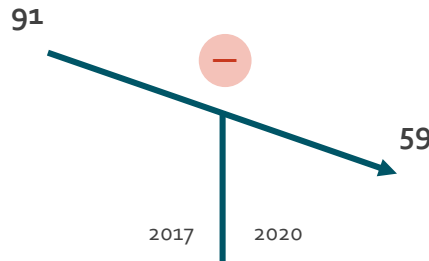
% assess the current and future importance of the following sales channels for their main sales market USA as follows

Base: All producers, which have their main sales market in the US (n=76)

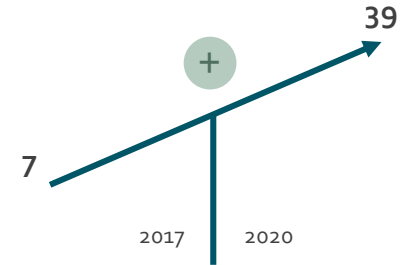
Food retailers



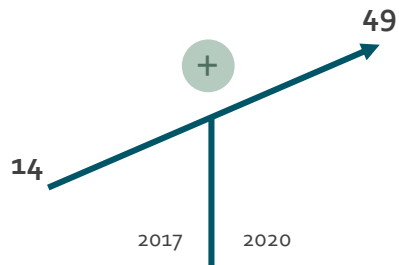
Wine merchants



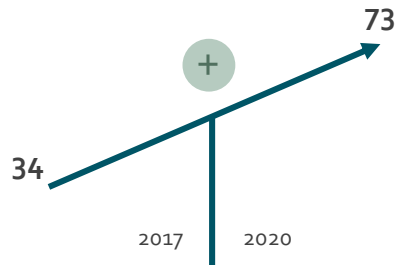
Direct sales (ex-cellar)



Direct sales (online)



Online retailers



Gastronomy

