

Exporting wine to the Nordic market

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As a result of the monopolies on the sales of alcohol, the Nordic wine market is rather unique compared to other European wine markets. They strongly regulate the quantity and quality of wine available in the Nordic countries through strict tender procedures. These tender procedures offer opportunities for developing country wine producers, if the specific tender requirements are met. As the monopolies promote consumption of organic and ethical wines, the Nordic wine market provides good opportunities for exporters in these niche markets.

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1. Product description

Wine is defined as: 'The product obtained exclusively from the total or partial alcoholic fermentation of fresh grapes, whether or not crushed'. Please refer to Table 1 for the Harmonised System (HS) codes for wine.

Table 1: HS codes of wine

Type of wine	HS Code
Sparkling wine	220410
Wine in containers < 2 litres	220421
Wine in containers > 2 litres	220429

Labelling

The European Union has set [compulsory labelling particulars](#) for wine; labels should provide the following information.

- The name of the Protected Denomination of Origin (PDO)/ Protected geographical Indication (PGI) or Wine of 'producing country'/Produced in 'producing country'/Product of 'producing country'
- Actual Alcoholic strength (AAS)
- Nominal volume
- Lot number
- Importer details
- Allergenic ingredients

The information on allergenic ingredients should include the following.

- All wines containing over 10 milligrams of sulphite per litre must be labelled with the indication 'Contains sulphites'. This information is crucial for individuals who are sensitive to sulphites and experience problems such as shortness of breath, coughing, and wheezing. If your wine contains only a few mg or no sulphites, you can mention this on the label to accommodate these consumers.
- Egg and milk derivatives must also be mentioned on the label.
- Allergens must be mentioned in the language of the target market.
- Sugar content (for sparkling wines) must be given.

Tips:

Legislation does not require the exact composition of a blend on the label. However, rising interest of consumers in the composition of wines increases the need to include such information on the label.

If you target educated consumers, it is worth mentioning the grape variety and vintage. This can have a positive effect on consumer perception of your product's quality.

The use of the term 'Reserve' or even 'Grand Reserve' can help to convince consumers of the high quality of your wine. Ensure compliance with the wine law in your country concerning the use of such terms. Educated wine consumers, however, will be less receptive towards this kind of marketing.

The [Food Standards Agency of the United Kingdom](#) provides useful guidance on more detailed labelling requirements for the United Kingdom, which are also applicable to the Nordic wine market.

Packaging

Bottled and boxed wine

- Bag-in-Box (BiB) wine is very popular on the Nordic wine markets. Between 39% (Finland) and 52% (Sweden) of the total wine sales in the Nordic countries is packed as BiB.
- Other packaging varieties that enjoy some popularity are PET bottles (up to 3.7% of total wine sales) and Tetra packs (up to 6.8% of total wine sales).
- Glass bottles accounted for 40% of total sales in Sweden in 2015, which was the highest share in many years. Sales of wine in glass bottles increased by 4% during the 2015. Glass bottles are usually coloured to reduce the effect of UV light and typically contain 0.75 litre.
- Bottles for sparkling wines need to be strong enough to withstand the pressure resulting from the high CO₂ levels. Although there are no legally binding requirements, the International Technical Centre for Bottling and Related Packaging (CETIE) has published standards that are internationally recognised.

Tip:

Create an account on the website of CETIE to gain access to the [data sheet on internationally recognised bottling standards](#) (DT 11: 'Bottling specifications for carbonated beverages CO₂>2g').

Bulk wine

Packaging-related quality problems with bulk wine hampered development of bulk wine trade for a long time. Recent improvements in storage technology, handling facilities, and quality protocols have contributed to better-quality preservation and, consequently, to the wider use of bulk wine.

Different types of packaging are available for the transport of bulk wine. The two most common are:

- Flexi-tanks – disposable plastic bags intended for installation in a standard 20 ft shipping container.
- ISO tanks – reusable steel tanks, which need to be cleaned between shipments. ISO tanks offer all the advantages of flexi-tanks, but are more polluting and expensive in transport due to higher weight. One advantage of an ISO tank is its reliability; they have a lower risk of defects compared to flexi-tanks.

2. What makes the Nordic countries interesting markets for wine?

The Nordic wine market consists of the wine markets in Sweden, Finland, Norway and Iceland.

Unfavourable climate for wine production

The climate in the Nordic countries makes wine cultivation rather difficult. The northern latitude causes low temperatures and increases the risk of autumn frost. Despite the rather unsuitable climate for grape cultivation, there are vineyards successfully producing wine. However, these vineyards are very small and produce small quantities of wine. For example, in Sweden there is between 40 and 100 hectares of commercial vineyards only.

Large differences in wine consumption between Nordic countries

Wine consumption in the Nordic countries varies strongly per country. Total wine consumption amounted to 2.8 million hectolitres (hl) in 2015, showing an average annual increase of 3.6% since 2011. However, wine consumption in Sweden accounted for 89% of total wine consumption in the Nordic countries in 2015.

On average, wine consumption in the Nordic countries was about 13.8 litres per capita in 2015, which is far below the European average of 23.9 litres per capita. However, per capita wine consumption in Sweden was about 26 litres per capita compared to 1.4 litres per capita in Iceland in 2015.

Tip:

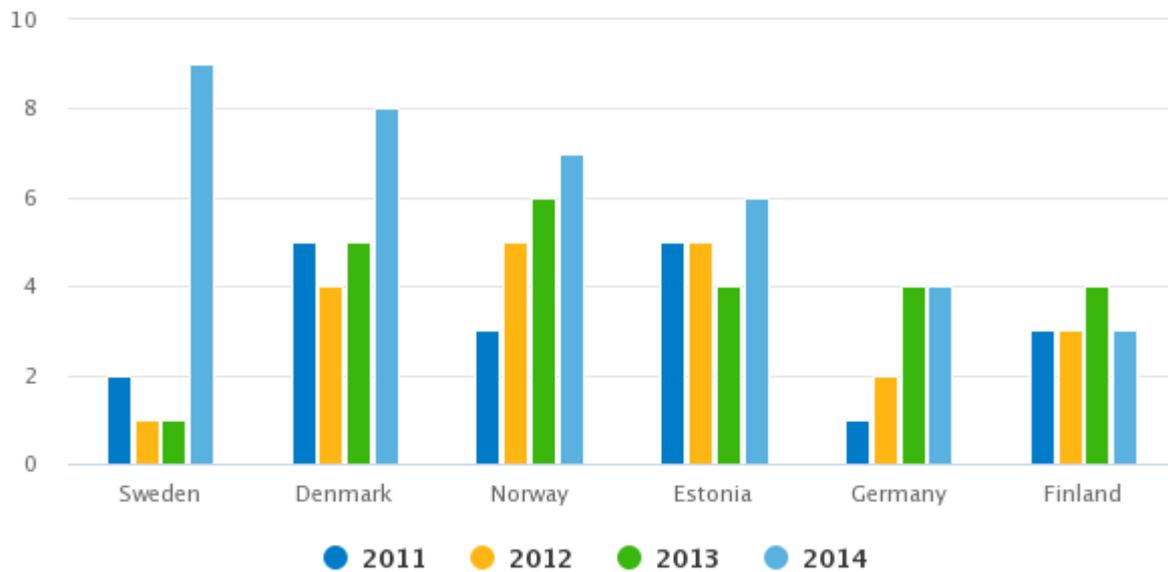
Due to insignificant domestic production, the Nordic wine market is open to 'foreign' wines. However, take into account that you can only supply the Nordic wine market through tenders set up by the monopolies.

Most imports come from traditional wine countries

The Nordic countries together are a considerable wine importer, ranking as the third largest in Europe in 2014. Wine imports in the Nordic countries amounted to €1.1 billion in 2014, showing an average annual increase of 5.6% since 2011. Sweden accounted for most of the wine imports (€592 million), followed by Norway (€347 million), Finland (€189 million) and Iceland (€14 million). The largest suppliers to the Nordic wine market were Italy, France and Spain. Together they accounted for €692 million (63%) of total imports in 2014.

Although the traditional wine-supplying countries dominate the wine imports, the Nordic market is receptive to New World wines. Wine from developing countries amounted to €171 million in imports in 2014 (15% of total imports), showing a slight average decrease of 1.5% per year since 2011. Chile is the largest developing country supplying the Nordic market, followed by South Africa and Argentina. They accounted for respectively 6.8%, 5.5% and 2.6% of total imports in 2014.

Figure 1: Leading six supplying countries to the Nordic wine market in € million, 2011-2014



Source: Eurostat, 2016

Tip:

Due to the wine monopolies in the Nordic markets, most wine imports are required to follow tender procedures. If you are looking to supply the Nordic markets, focus on the tender requirements instead of concentrating on your Unique Selling Points (USPs). Wines will be selected based on the tender requirements and taste rather than on USPs.

Little wine exports from the Nordic countries

Wine exports from the Nordic countries are rather insignificant. They are only a very small trade hub in wine trade due to a low domestic production (meant for the domestic market). Therefore, current exports consist mainly of re-exports. Total wine exports amounted to about €44 million in 2014. However, wine exports have shown an average annual increase of 11.6% since 2011. This increase is due to a large increase in exports from Finland to Sweden. Most wine exports are destined for Nordic countries or neighbouring countries.

Tips:

Do not bother to use the Nordic wine markets as trade hubs to market your wines in other countries through re-exports. Almost all imported wine is intended for domestic consumption.

Please refer to our study on [European trade statistics for wine](#) for more information about overall trade statistics for wine in Europe.

3. Which trends offer opportunities on the Nordic wine market?

Large demand for sustainable and ethical wines

All Nordic monopolies strongly encourage importing sustainable and ethical wines. They regularly publish tenders for organic and/or fair-trade wines resulting in increasing sales of sustainable wines. In 2015, Systembolaget sold more than 34 million litres of organic wine, which represented an increase of 62% compared to 2014. The 2020 target for organic wine sales (10% of total sales) set by the Swedish alcohol monopoly has already been achieved (10.8% in 2014).

Especially among millennials (people born between 1982 and 2000), sustainable wines are popular. These younger consumers are exceptionally environmentally aware. The image of sustainable and ethical wines is something they can and want to relate to.

Tips:

Consider acquiring organic certification if conversion costs are low. Carefully calculate the costs involved in organic production before converting to organic production because of low or non-existent price premiums. However, with organic certification you will be able to apply for more tenders, increasing your chance to gain access to the Nordic wine markets.

If you aim to supply the Nordic markets, consider using sustainable production methods and compliance with high social standards certified by a third party. This way, you will expand your opportunities to supply the Nordic markets.

If you are producing organic or fair-trade wine, keep an eye out for wine tenders in the Nordic markets as these markets are very receptive to sustainable wines.

For more information, read our studies on [sustainable wine in Europe](#) and on [trends in the European wine market](#).

Authenticity in the premium segment

In the market for premium wines, consumers appreciate products that offer a certain experience or story. This story may be related to such things as production processes, production conditions or heritage.

Tips:

Develop a Unique Selling Point (USP) for your wine. Note that you must always meet quality and price requirements before a story becomes relevant. As monopoly buyers conduct blind tastings, they will not even consider the story until they have selected the wines that meet their quality requirements.

The on-trade, specialist retailers, and online shops offer more opportunities to convey this kind of information to consumers than supermarkets.

A changing packaging landscape

The Nordic monopolies are very environmentally aware. They increasingly require wine in lightweight (glass) and recyclable packaging (PET bottles) with a Stelvin screw cap closure. Bag-in-Box wine is also remains popular. PET-bottles should be recyclable in the Swedish recycling system. To this end, the PET bottle has to be

authorised by [Returpack](#), which handles the recycling process.

Additionally, the Nordic monopolies demand more single-serve packaging. The monopoly's motive for providing single-serve packaging is based on health concerns; a smaller container results in a lower alcohol intake, while consumers prefer it for on-the-go consumption during festivals and picnics.

Tips:

Generally, exporting wine in single-serve packaging is expensive. Therefore, consider collaborating with an importer in one of the Nordic countries for local packaging if you are targeting this market segment.

For more information about packaging trends, read our study on [trends in the European wine market](#).

Introduction of a packaging fee in Sweden

Systembolaget is introducing a general requirement with regard to the bottle weight for bottles of still wine (75cl). All 75 cl glass bottles may not weigh more 420 grams. As of the 2016 harvest, this requirement will apply to wines with vintages dating from 1 January 2017. Heavy and single-use glass bottles have a substantial impact on the environment during both manufacture and transport. The aim of this new regulation is to reduce the climate impact of Systembolaget.

Producers supplying glass wine bottles that do not comply with the new weight regulation will be taxed based on the [weight of their wine bottles](#) (page 20).

Tip:

If you supply your wine in glass bottles, make sure the weight of your glass wine bottles does not exceed 420 grams when supplying wine to the Swedish monopoly Systembolaget. If it does, you will be charged an additional tax.

Wine monopolies push for low-alcohol content wine

Due to health concerns about alcohol consumption, wine monopolies keep pushing for low-alcohol content wine. [Systembolaget](#) in Sweden looks out for dry white, red and rose wines with an alcohol content below 10% (about 7%). It is expected that this trend will be adopted by [Vinmonopolet](#) in Norway and [Alko](#) in Finland in the near future as well.

Tip:

Lower the alcohol volume of your wine to below 10% to meet the tender requirements for low-alcohol content wines.

Changing consumer preferences

Italian red wines are currently very popular in Sweden because of their high residual sugar levels. These wines have become increasingly popular over the last years. Due to health concerns, it is now compulsory to list the residual sugar level of a wine on the shop shelves (not on the bottle). This is causing a dual trend. On the one hand, consumption of dry red wines with low residual sugar levels is growing. But on the other hand consumers are looking for the red wines with high residual sugar levels.

Other wines that enjoy increasing popularity are rosé wines (especially among millennials) and sparkling wine. Sparkling wine imports have been rapidly increasing between 2011 and 2015 with an average of 9.2% per year, currently accounting for 10.4% of the total value of retail sales. In the on-trade, natural wine is very trendy in the high-end market restaurants.

Tips:

If you produce a high-quality natural wine, look for an importer who supplies wines to the high-end market restaurants in Sweden.

Be flexible in your packaging options as the monopolies often specify the type of packaging for the tendered wine.

Follow and monitor trends in the Nordic markets to be able to respond in timely fashion to changing consumer preferences. The website of [Concealed Wines](#) gives an overview of relevant trends in the Swedish wine market.

Increasing listing times for wines

Systembolaget in Sweden has three types of product ranges. The first is the fixed range. This assortment can be found (to a greater or lesser extent) in every Systembolaget shop. The second is the available-for-order range. The available-for-order range includes items that can be ordered from the drinks suppliers' stocks. The last type of product range is the temporary range, which is primarily aimed at customers with a substantial interest in new items.

As of 1 March 2016, Systembolaget has applied new listing times for new launches in their fixed product range. The guaranteed listing time for new products has been extended from six months to nine months. In addition, an item labelled as ethical and/or organic will be given a guaranteed listing time of 12 months

Tips:

Benefit from longer listing times for organic and/or ethical wines in the Swedish Systembolaget shops.

All monopolies are open to presentations from Generic Offices or from specific Interest Groups such as fair trade, organic or, more specifically, black economic empowerment in South Africa. Regarding wines from developing countries, the Monopoly Buyers Offices are usually prepared to listen to your input on indigenous grape varieties, unique winemaking techniques, or other USPs you may have to offer.

4. With which requirements should wine comply to be allowed on the Nordic markets?

You can only export your wine to Europe if you comply with [buyer requirements for wine](#). Please note that Norway is not a member of the European Union. Legislation can therefore be different from European legislation. However, in the last decennia, legislation on food production between the European Union and the European Free Trade Association, including Norway, has become almost identical.

With which legal and non-legal requirements must my product comply?

[Buyer requirements for wine](#) can be divided into legal and non-legal requirements, both of which your product must comply with if you want to sell to Europe. These include the following points.

- Compliance with [European Oenological practices](#): To prove compliance with allowed oenological practices, all wine imported to Europe needs to be accompanied with a certificate and analysis report for wine.
- [Labelling and presentation](#): There are strict rules on which information should be shown on the label and how this information has to be visible.
- Food safety – traceability, hygiene and control: Read more about [health control](#) at the EU Export Helpdesk. Search the [European Union's Rapid Alert System for Food and Feed \(RASFF\) database](#) for wine to see examples of withdrawals.
- Avoid ochratoxin A and lead contamination: Check the European Commission's [factsheet on food contaminants](#). Read more about [contaminants at the EU Export Helpdesk](#). Find out more about prevention and reduction of [ochratoxin A](#) and [lead contamination](#) in wine in the Codes of Practice published by the Codex Alimentarius.
- For a full list of requirements, please consult the [EU Export Helpdesk](#) on where you can select your specific product code under Chapter 2204. Note that there is also non-product-specific legislation on [packaging](#) and [liability](#) that applies to all goods marketed in Europe.

Tips:

Check whether your current practices comply with the European requirements for winemaking.

Ensure compliance with European legislation on hygiene of foodstuffs ([HACCP](#): hazard analysis and critical control points).

Which additional requirements do buyers often have?

In addition to the legally binding requirements, you also have to comply with the following non-legal requirements in order to be able to find a buyer.

- [Food safety certification](#): many importers of wine require at least the implementation of a basic food-safety management system such as HACCP. Only with a main listing would the monopolies be pushing for a higher certification, such as [BRC](#), [IFS](#), [FSSC 22000](#) and [SQF](#).
- [Corporate social responsibility](#): Several larger retailers participate in initiatives such as the [Ethical Trading Initiative](#) (ETI), or the [Business Social Compliance Initiative](#) (BSCI). These initiatives focus on improving social conditions in their members' supply chains. This implies that you, as a supplier, are also required to act in compliance with their principles.
- Buyers generally prefer low sulphite levels (e.g. < 100 mg/l for white wine). However, sulphite is a preservative and lower sulphite levels may lead to off-tastes and reduced shelf life.

Tip:

Suppliers can apply a basic [HACCP](#) system. However, many buyers appreciate certified food-safety management systems recognised by the Global Food Safety Initiative, such as ISO22000, BRC or [IFS: Food Safety Management Systems](#).

What are the requirements for niche markets?

In addition to the requirements you have to comply with to be allowed on the European market or to find a buyer, complying with the following additional requirements could be a competitive advantage and make finding a buyer easier.

- [Fair-trade certification](#): A niche market is the market for wine produced with extra focus on the social conditions in the producing areas. Having your wine [Fairtrade](#) certified is the most convincing way to prove your business performance for social conditions in your supply chain.
- [Organic niche market](#): To market organic wine in the European Union, grapes must be grown using organic production methods which are laid down in [European legislation](#), and the grapes and the wine production facilities must be audited by an accredited certifier. Only then may you put the European organic logo on your products, as well as the logo of the standard holder (e.g. [Soil Association](#) in the United Kingdom).

Tip:

Consult the [Standards Map database](#) for the different labels and standards relevant for wine.

5. What competition do you face on the Nordic wine market?

What are the opportunities and barriers when trying to enter the Nordic market?

Monopolies dictate the market

As the monopolies control approximately 90% of the Nordic markets, they have a lot of power. Through tenders they determine the wine supply in their respective countries. As the requirements for wine in these tenders are very strict, importers usually only buy wines that are listed by the monopoly. This way they avoid the risk of not being able to sell their wines.

Tips:

If you aim to supply the off-trade, you will need to meet the specific requirements of the tenders. If you do not, importers will not be very keen to import your wine.

If you aim to supply a monopoly, you can improve your chances by working together with an importer with good knowledge of product development to match the monopoly's style preferences.

What are substitute products?

High excise duties on wine compared to low-alcohol beverages

The Nordic countries are characterised by high excise duties on wine. In Sweden, excise duties are €268.47 per hectolitre (hl) of still and sparkling wine and in Finland excise duties amount to €339 per hl of still and sparkling wine. However, in both countries, still and sparkling wine with lower alcohol content benefit from lower excise duties. In comparison, excise duties on beer (with an actual alcohol content of > 2.8%) are €20.69 per hl in Sweden and €32.05 per hl in Finland.

Tips:

Lower the alcohol content of your wine to benefit from lower excise duties. For example, if your wine contains more than 8.5% alcohol, decrease it to below 8.5% alcohol to benefit from lower excise duties in Sweden and Finland.

For more information on excise duties, please refer to this [spreadsheet](#) of the European Commission.

Who are my rivals?

Wine tenders influence rivalry

Depending on the tender set-up, your competition will vary. A tender can be set up with criteria for specific origins of wine. In this case, other wine producers from your country/region are your direct competitors in the tender procedure. If a tender does not determine a specific country/region of origin for a wine, your competitors can be wineries that produce wine with similar characteristics to your wine (grape variety, taste, premium wines, organic or sustainable, an international rating, a specific price range or a combination of these factors).

Tips:

Keep an eye out for current and upcoming tenders on the website of [Concealed Wines](#) to find out about the requirements for your wine for specific tenders.

First focus on meeting the tender criteria and the taste profile of your wine before promoting your Unique Selling Point to distinguish yourself from your competition. This is important as a blind tasting will decide which wine is selected.

How much power do I have as a supplier when negotiating with buyers?

Off-trade wine imports through tender procedures

In the Nordic off-trade market, wine is imported through tenders of the wine monopolies. The wine monopolies identify specific needs and put out a tender, calling for wine samples that meet the listed criteria. The listed criteria can be very specific and elaborate, ranging from a specific origin and grape to packaging, taste profiles and price. Wines that do not meet the requirements set in the tenders will be disqualified.

Tips:

Keep up to date on the latest tender calls and specifications if you aim to supply the Nordic wine markets.

Pre-tender homework can help to put your wine on the Nordic markets. For example, when possible, let buyers taste pre-samples for upcoming tenders to gain a better understanding of what the monopolies are looking for.

Make sure the sample you submit for a tender is a sample of your final product. The monopolies will check whether the wine delivered resembles your sample. If not, the monopoly will curtail the sales of your wine until you deliver the correct wine.

Do not bother to apply for the tender if you do not meet the requirements, as your wine will be disqualified from the tender procedure.

For more information about the tender procedures, visit the [Concealed Wines](#) website.

On-trade wine imports are not regulated by monopolies

The on-trade market is not regulated by the monopolies but has only a small share of the total wine market compared to the off-trade market. However, if your wines offer specific advantages to sommeliers, such as being orange wines, organic wines, sustainable wines, or made from 'exciting indigenous varieties', sommeliers might be more receptive towards your wine than the monopolies. However, the on-trade segment of the market is very competitive and difficult to enter.

Tip:

Develop your Unique Selling Points and use these to market your wine to sommeliers in the Nordic on-trade market. If a sommelier is interested in your wine, you might be able to bypass the monopolies.

Strong importers in Finland

In Finland, the wholesale market is very concentrated, as the two biggest importers (Pernod-Ricard and Altia) serve almost half of the Finnish market in terms of value. In Sweden and Norway, sales are more evenly divided, as importers do not have market shares of more than 10%. In Sweden, some 474 importers actively supply the monopoly, of which 84 supply 99% of the monopoly's purchases in terms of value.

Tip:

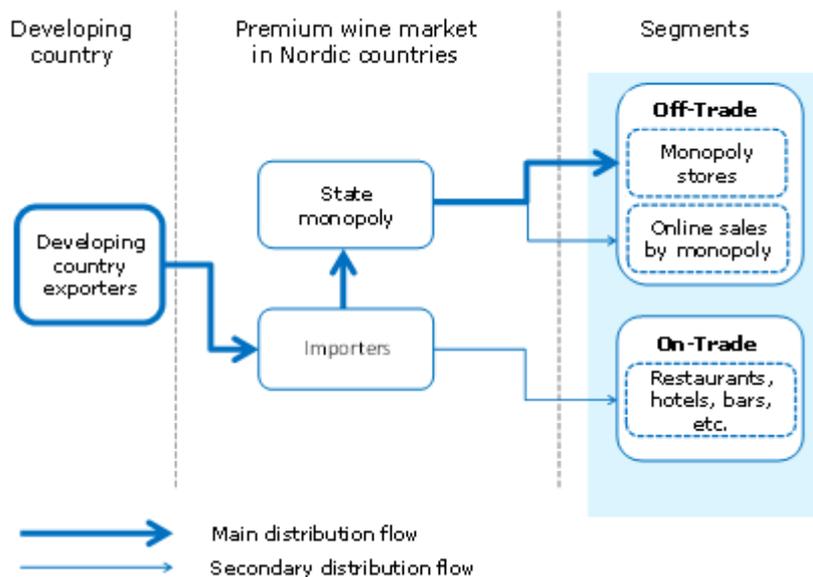
If you supply small volumes of wine, consider focusing on Sweden and Norway. You will find more suitable importers in these countries, since there is a higher presence of smaller importers.

6. Through what channels can you get wine on the Nordic market?

Trade channels

The trade channels for wine in the Nordic market are presented in Figure 2.

Figure 2: Trade channels for wine on the Nordic market



Monopolies dominate the Nordic markets

The Swedish [Systembolaget](#), Finnish [Alko](#), and Norwegian [Vinmonopolet](#) control most of the off-trade channels in their countries. In Sweden, Finland, and Norway, the monopolies have 431, 350, and 304 stores, respectively.

Tips:

If you aim to supply the off-trade, your product will have to go through the monopoly.

Promote your wine to attract attention from the monopoly and thereby influence tender design.

If you can show that there are sufficient suppliers of good quality wine in your region, the monopoly may consider writing a tender for wine from your region.

Winning a tender might engage you in supplying large volumes of wine. Make sure you can deliver a stable supply of your wine. If you cannot provide the agreed volumes, your wine will be delisted.

Suppliers can improve their chances in monopoly tenders

The Nordic monopolies use tenders to buy wine for their stores. Importers are informed several times a year about detailed tender requests. The monopolies also regularly issue tenders for small volumes, which are interesting for new suppliers in developing countries.

Tips:

Embassies are a particularly good place to inspire, educate, and influence buyers at monopolies. Embassies have an interest in the promotion of wine from your country and can use their knowledge of the target country's culture to convince potential buyers of the value of your wine. They can also provide a good setting for promotional events.

As a producer, work together with Business Support Organisations in your country. They can invite journalists to your country to educate them and attract the attention of journalists to your wines. Wine journalists, such as Arne Ronold MW (Master of Wine) in Norway, have a lot of influence on the

purchasing behaviour of buyers.

On-trade most interesting for small suppliers

The on-trade is very competitive as importers selling directly to the restaurant trade can bypass the strict tender procedures. This can be an interesting market channel for producers of small volumes of wine. It is not unusual for ambitious restaurants to try and distinguish themselves by having a wine selection that is not available in the monopoly shops. However, this requires a lot of marketing support from importers, which often need to offer discounts to gain or retain interest from their customers.

Tips:

If you only have small amounts of premium wine to offer, the on-trade provides better opportunities than the off-trade.

If you supply a premium wine, aim to supply the market through an importer with a strong reputation in this segment, which can provide the necessary marketing support.

Online sales expected to increase

Although the wine monopoly dominates the market in Sweden, there are independent internet-based wine merchants selling directly to Swedish consumers. Examples of these online wine stores are [Xwine](#), [Winefinder](#) and [Vineo](#). There are now 93 companies in the online wine trade in Sweden, of which 21 are Danish and 9 are German. Although the online wine trade in Sweden is still very small, accounting for between 0.3% and 1.7% of total wine sales, there are expectations that the online trade will take a much larger market share in the near future.

The monopoly also allows consumers to order their wines online through their website. Consumers can choose to pick up their order at one of the stores, at one of the monopoly's collection points or for delivery at home. However, home delivery is still very costly.

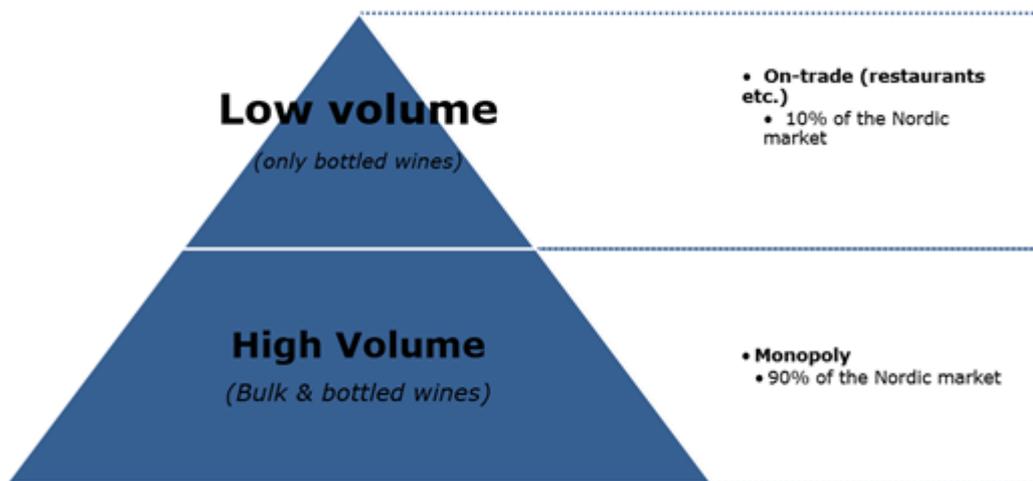
Tip:

Online shops provide a space for storytelling. If you have a unique and interesting story to tell, then you can use this as a Unique Selling Point.

Segmentation of wine

The segmentation of the Nordic wine market is presented in Figure 3.

Figure 3: Market segments for wine in the Nordic countries, including an indication of share in sales per segment



Premiumisation in the wine market

Over the last years a premiumisation of wine consumption has been noticeable, especially in Sweden. The Swedish economy is currently doing well and people are willing to spend money on their wines. This trend is not only noticeable in the off-trade. In the on-trade consumers are also willing to spend more on their wines.

Tip:

If you aim for the premium market, have a critical look at your entire production process. Factors that influence the quality of your wine and subsequent chances on the premium market are: controlled irrigation, such as drip irrigation, which can contribute to the production of a good quality wine; absorption of excessive amounts of water by vines diluting flavour and sugar in the grapes, which causes a reduction in potential alcohol content, body, and flavour of the wine; and increasing the ratio between leaves and grapes, which can also improve the taste of the final wine, something particularly important for wine producers in countries with little sunlight.

Product appreciation in the Nordic wine market

Table 2 provides some insight into which product options are appreciated in the Nordic wine market. High volume and low volume refers to matching target segments to your export capacity. For more detailed information on specific segments, please read our studies on [sustainable wine](#) and [bulk wine](#) in Europe.

Table 2: Appreciation for product options in the Nordic wine market

	<i>Organic</i>	<i>Fairtrade</i>	<i>QMS</i>	<i>CSR</i>	<i>Screw cap</i>	<i>Bag-in-Box</i>	<i>Bulk wine</i>	<i>Online sales</i>
<i>High-volume segment</i>	+++	+++	+	++	++	+	-	+
<i>Low-volume segment</i>	+++	+++	++	++	++	+++	++	-

7. What are the end-market prices for wine in the Nordic countries?

End-market prices of wine in Sweden can be divided by price segment, packaging type and type of wine. An overview of the market shares of various price segments in 2015 and their change compared to 2014 is provided in tables 3 to 6.

Table 3. Market shares of consumer price segments for red wines in Sweden in 2015

Red wine price segments	Market shares	% change since 2014
<i>Glass bottles</i>		
€0.00–5.99	3.65%	–8.20%
€6.00–6.99	4.84%	–9.30%
€7.00–7.99	7.82%	3.50%
€8.00–8.99	7.57%	7.80%
€9.00–9.99	5.44%	1.50%
€10.00–11.99	3.58%	–5.40%
€12.00–14.99	1.87%	–1.50%
€15.00–19.99	1.42%	5.90%
€20.00–29.99	0.56%	4%
€30.00–49.99	0.11%	–7.30%
€50 and higher	0.03%	3.60%
<i>Other glass bottles</i>		
Small bottles €0.00–18.66	1.00%	5.30%
Small bottles €18.67 and higher	0.07%	11.40%
Large bottles	0.15%	4.60%

<i>Boxed wine</i>		
Box 1.5–2 litres	0.54%	14%
Box ≥ 3 litres (€0–6.66)	28.17%	–1.70%
Box ≥ 3 litres (€6.67 and higher)	29.46%	–0.30%
<i>Wine not boxed not bottled</i>		
Not boxed not bottled ≥ 500 ml	3.63%	–1.70%
Not boxed not bottled < 500 ml	0.09%	–7.90%

Source: Systembolaget, 2016

Table 4. Market shares of consumer price segments for white wines in Sweden in 2015

White wine price segments	Market shares	% change since 2014
<i>Glass bottles</i>		
€0.00–5.99	4.62%	–0.80%
€6.00–6.99	6.25%	–0.40%
€7.00–7.99	7.06%	5.20%
€8.00–8.99	4.41%	2.10%
€9.00–9.99	4.09%	–0.80%
€10.00–11.99	2.78%	1.50%
€12.00–14.99	1.57%	4.50%
€15.00–19.99	0.58%	–5.80%
€20.00–39.99	0.14%	14.10%
€40 and higher	0.01%	14.10%

<i>Other glass bottles</i>		
Small bottles €0.00–18.66	1.02%	–4%
Small bottles €18.67 and higher	0.06%	5.50%
Large bottles	0.07%	–11.50%
<i>Boxed wine</i>		
Box 1.5–2 litres	1.10%	7%
Box ≥3 litres (€0.00–5.66)	13.40%	–4.90%
Box ≥3 litres (€5.67–6.66)	27.78%	0.30%
Box ≥3 litres (€6.67 and higher)	14.97%	1.50%
<i>Wine not boxed not bottled</i>		
Not boxed not bottled ≥ 500 ml	9.73%	–1.50%
Not boxed not bottled < 500 ml	0.37%	–1.70%

Source: Systembolaget, 2016

Table 5. Market shares of consumer price segments for rosé wines in Sweden in 2015

Rose wine price segments	Market shares	% change since 2014
<i>Glass bottles</i>		
€0.00–7.99	20.04%	–9.60%
€8.00–9.99	12.96%	–5.60%
€10 and higher	4.17%	10.30%
<i>Other glass bottles</i>		

Small bottles	1.05%	25.50%
<i>Boxed wine</i>		
Box (€0.00–6.66)	33.37%	2.30%
Box (€6.67 and higher)	18.00%	–10%
<i>Wine not boxed not bottled</i>		
Not boxed not bottled	10.42%	–9.30%

Source: Systembolaget, 2016

Table 6. Market shares of consumer price segments for sparkling wines in Sweden in 2015

Sparkling wine price segments	Market shares	% change in 2014
<i>Champagne</i>		
Champagne (€0.00–24.99)	3.66%	19.80%
Champagne (€25.00–39.99)	5.46%	7.50%
Champagne (€40 and higher)	0.93%	14.50%
Champagne small bottles	0.99%	7.60%
Champagne large bottles	0.43%	9.60%
<i>Rosé Champagne</i>		
Rosé Champagne	0.41%	–0.40%
Rosé Champagne small bottles	0.08%	1.80%

<i>Sparkling wine</i>		
Sparkling wine (€0.00–7.99)	29.93%	23.10%
Sparkling wine (€8.00–11.99)	30.80%	14.60%
Sparkling wine (€12 and higher)	2.53%	6.30%
Sparkling wine small bottles	3.71%	16.50%
Sparkling wine large bottles	0.6%	–11.40%
<i>Sweet sparkling wine</i>		
Sweet sparkling wine	5.35%	–5.40%
Sweet sparkling wine small bottles	0.61%	7.90%
<i>Sparkling rose</i>		
Sparkling rosé (€0.00–7.99)	8.67%	11.20%
Sparkling rosé (€8 and higher)	2.75%	–13.40%
Sparkling rosé small bottles	0.37%	12.10%
<i>Other sparkling wine</i>		
Other sparkling wine	2.57%	–4.70%

Source: Systembolaget, 2016

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