



CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Wine in Nordic countries

Introduction

The Nordic countries consist of several countries in Northern Europe and the North Atlantic. This factsheet focuses on wine in Norway, Sweden, and Finland. State monopolies dominate the wine retail sector in these three Nordic countries. In Sweden and Finland in particular, the monopolies and the on-trade show strong interest in New World wines. Developing country producers can get the attention of the monopolies by optimising the price/quality ratio of their wine and promoting Unique Selling Points.

Product Description

Wine is defined as: 'The product obtained exclusively from the total or partial alcoholic fermentation of fresh grapes, whether or not crushed'.

In the Harmonised System (HS), wine is registered under the code 2204.

Product Specification

Quality preferences

The quality of a wine depends on inputs used and actions taken by the producer during the production process.

Grape variety

Most of the wine traded internationally is made from international grape varieties, such as Chardonnay, Cabernet, Merlot, Sauvignon Blanc, and Pinot Grigio. However, Nordic consumers are open to trying new wines, including those made from indigenous grape varieties. These varieties are cultivated only in a particular area and have existed there for a long time.

Colour

Red wines are fermented in contact with the skins of dark grapes, which give colour to the wine. White wines are fermented without grape skins or fermented with white and green skinned grape varieties. Rosé gets its pink colour by either a short contact time with the skins of dark-coloured grapes before fermentation or by mixing finished red wine with finished white wine.

Still or sparkling

Exact specifications of sparkling wine and quality sparkling wine are laid down in EU legislation. The differences are related to the fermentation process, Actual Alcoholic Strength, and pressure.

Taste intensity

In general, wines with an intense or full taste are perceived to be of higher quality. Taste intensity can be influenced by many factors including: leaf/grape ratio on vines, irrigation, and yeast selection.

Sugars/acids balance

A major aspect of the art of winemaking is to find a balance between sugars and acids. Bulk wine generally has a higher sugars/acids ratio, as most consumers who purchase this type of wine prefer a sweet taste. In contrast, most connoisseurs looking for premium wine prefer dry wine with a low sugars/acids ratio.

Alcohol content

Non-fortified still wines can have an alcohol content between 9-15%. Many consumers consider wines strong when the alcohol percentage exceeds 13%. In Nordic countries, excise duties are related to alcohol content; in Norway, duties even increase with every 0.5% of alcohol. Therefore, low alcohol wines are more common in Norway than in other European countries.

Tannins

Most consumers prefer soft tannins. The use of soft presses reduces seed damage and subsequent amounts of sharp tannins in the juice. The appropriate amount of tannins (natural minerals in the skin of black grapes) in wine depends on the style of the wine. Tannin content can be influenced during processing.

Sulphite

Although consumers generally prefer low sulphite levels (e.g. < 150 mg /l for white wine), not many pay attention to sulphite content when purchasing wine. Moreover, sulphite is a very useful ingredient as a preservative. Lower sulphite levels may lead to off-tastes and reduce shelf life.

Off-tastes

Unripe and overripe grapes and contaminants can cause off-tastes in wine. Minimise off-tastes by: harvesting at the right time, sorting the grapes during harvesting, proper handling of the grapes, and minimising time between harvesting and processing. If off-tastes cannot be prevented, clay or coal may be added to grape juice for removal of the off-tastes.

Labelling

The EU and EFTA countries (including Norway) have set compulsory labelling particulars for wine:

- Wine of 'producing country'
- Actual Alcoholic strength (AAS)
- Nominal volume
- Lot number
- Importer details
- Allergenic ingredients: 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 serve these consumers.
- If wine is clarified with egg or milk products, these must also be mentioned on the label. Moreover, allergens must be mentioned in the language of the target market.

Production date and Best Before date on Bag-in-Boxes (BiB) must be printed in the country where the product is packed. Legislation does not require the exact composition of a blend on the label. However, rising interest of consumers in the composition of a wine increases the need to include such information on the label.

Tips:

- 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 Food Standards Agency of the United Kingdom provides useful guidance on more detailed labelling requirements, which is also applicable to the Nordic markets:
<http://www.food.gov.uk/multimedia/pdfs/thirdcountrywine.pdf>

Packaging

Bulk wine

Two types of packaging are available for the transport of bulk wine:

- Flexitanks are intended for installation in a 20 ft ISO shipping container.
- ISO tanks offer all the advantages of flexitanks, 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 flexitanks.

Bottled and boxed wine

Glass bottles and Bag In Box (BiB) are the most common types of packaging on the Nordic consumer markets. Currently, around 50% of wine on the Swedish and Norwegian market is packed as Bag in Box. On the Finnish market, 40% is packed as Bag in Box. Lower handling fees per litre for boxed wines than for traditional glass-bottled wines has added to the success of Bag in Box. The government's efforts to promote sustainability have also contributed. Glass bottles are usually coloured to reduce the effect of UV light and typically contain 0.75 litre.

- Bags in boxes typically contain 3 litres.
- Besides glass bottles and BIBs, there are niche markets for wine in Tetra Pak packages, aluminium cans or plastic containers (PET).

Table 1: Characteristics of different types of packaging for wine

	Recyclability	Transport costs + emissions	Quality perception	On-the-go consumption at events	Price	Shelf life
Glass bottles	High	High	High	Not suitable	High	Long
Bag in box	High	Low	Medium	Not suitable	Low	Short
Tetra Pak	High	Low	Medium	Suitable	Low	Medium
Cans and plastic containers (PET)	High	Low	Low	Highly suitable	Medium	Short

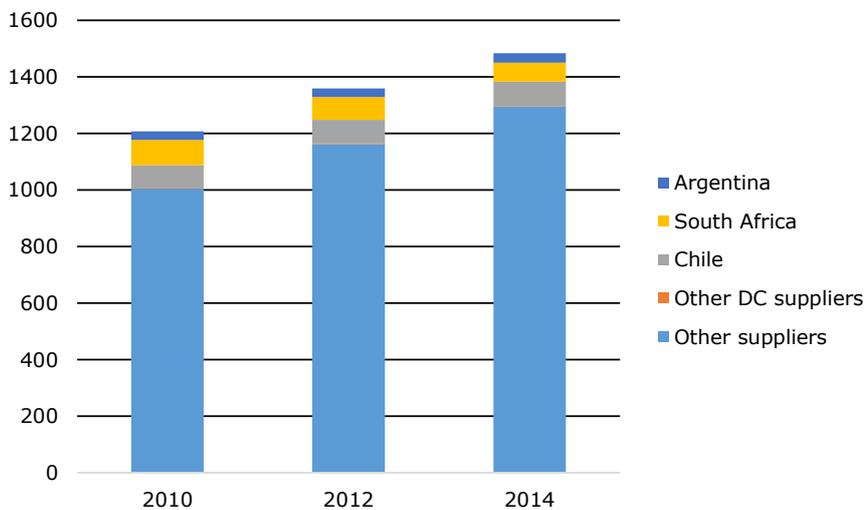
- Corks (natural or synthetic, e.g. Nomacorc) and screw caps (e.g. Stelvin) are both common stoppers in the sustainable wine market. Plastic stoppers are very common as well, unlike glass stoppers (e.g. Vinolok), which are less common for wines. The selection of the type of stopper should depend on the requirements of the buyer.
- Bottles for sparkling wines need to be strong enough to withstand the pressure resulting from the high CO2 level.

Please refer to 'Trends' for more information on packaging trends.

What is the demand for wine in Nordic countries?

The Nordic countries are generally perceived as non-traditional wine countries that do not produce significant quantities of wine themselves.

Figure 1: Imports by Nordic countries, in million euros, 2010-2014



Source: Eurostat, 2015

Import and Export

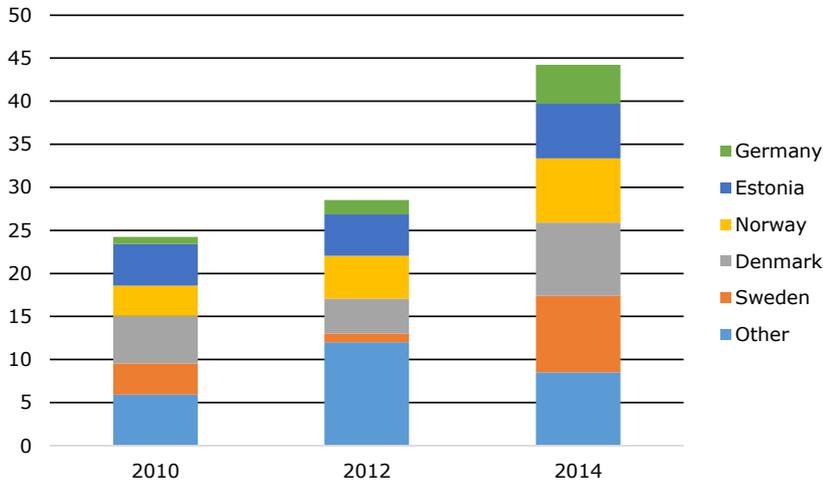
Wide acceptance of New World wines

Although Nordic countries are considered to be very open to New World wines, only a limited number of New World countries supply significant amounts of wine directly to the Nordic market (see Figure 1). As the bulk of the market consists of relatively cheap wines from countries such as South Africa and Chile, imports of premium wines from New World countries are not shown in the figure.

Tip:

- Nordic countries, and particularly Sweden, could offer good opportunities for new entrants to the European wine market if you are able to make a competitive offer in the tender procedures of the monopolies.

Figure 2: Main destinations of wine (re-)exports by Nordic countries, in million euros, 2010-2014



Source: Eurostat, 2015

Competition from ferry trade

Importers in Nordic countries face strong competition from small-scale tax-free ferry trade between the Nordic states, Germany and the Baltic states, which is not registered in official data (because officially the wine is not sold in any of the Nordic countries). € 90 million is a rough estimate of the value of this trade. Due to high excise duties and subsequent prices of wine in Nordic countries, many consumers and small-scale traders purchase their wine in neighbouring countries or on board ferries where prices are lower. They can bring up to 90 litres a time, largely by ferry, to the Nordic countries.

Tips:

- The ferry trade offers particularly good opportunities to promote your product, as direct promotion in Nordic countries is not allowed by the monopoly.
- You may also consider supplying importers in neighbouring countries, such as Germany, to enter the ferry trade.

Trade between Nordic countries offers few opportunities

Nordic countries only re-export small quantities of wine. Although figure 2 shows that some trade with geographically nearby countries exists, this does not offer opportunities for accessing a Nordic market through one of the neighbouring markets.

Tip:

- Although Nordic markets share many similarities, limited opportunities exist to access the three markets through one importer. Only a few importers have a presence in all three markets. Therefore, you will often need an importer in each target market to supply the market directly.

Please refer to [CBI Trade Statistics for wine](#) for more trade statistics.

Production

No ideal climate for viticulture

The Nordic countries are all situated in the northern area of Europe where the weather is quite cold and the amount of sun hours is low. Because of these circumstances, competitive grape cultivation is difficult in the Nordic countries. As a consequence, only a few small vineyards exist and wine is mainly imported.

Tip:

- As Nordic countries have never had significant domestic wine production, they do not have a strong preference for a specific type of wine. This offers opportunities to suppliers of non-traditional wines.

Consumption

Sweden is a leading wine market

The Swedish wine market is by far the biggest and most mature of the three Nordic markets (200 million litres). Per capita consumption is about 25 l, which is similar to the per capita consumption in Germany. In Norway and Finland, total consumption amounts to approximately 70 million and 60 million litres, respectively. Consumption of wine has increased in all three countries in recent years (Vinexpo 2014).

Tip:

- If your country is not yet established on the European wine market, Sweden is an attractive entry market to introduce your product. If the wine is received well, you can adjust your marketing strategy accordingly before entering other European markets.

New World wines welcome in Sweden

Swedes are open-minded, like to experiment, and welcome wines from many different countries. Traditional and New World wines both account for half of the Swedish market. South African wines currently have a 20% share in the Swedish wine market.

Tip:

- Although the Nordic markets are not very big wine markets, compared to some other European countries, they offer plenty of opportunities, because the Nordic countries are quite open to New World wines.

Traditional consumption in Norway

Norwegian consumption patterns are much more traditional. Consumers show less interest in New World wines and tend to choose known wines from traditional origins. Red wine still accounts for approximately 75% of the market. Norway is anticipated to also head to a more even distribution of red and white wine.

Tip:

- Developing country suppliers may better serve Sweden and Finland instead of Norway, as these two countries offer more opportunities for suppliers in developing countries. In Norway, wines from traditional origins, such as Chablis and Chianti, are more easily accepted than New World wines.

Growing interest in Finland

Finland is part of the Vodka belt. Although vodka still accounts for a large share (approximately 24%) of alcohol consumption, the share of vodka and other spirits has decreased sharply in recent years. Meanwhile, there is a growing interest in wine. Finns increasingly consume full fruity wines, strong in taste and bouquet. A willingness to pay more for high quality wines is also on the rise. However, many wines are still sweet, which indicates that consumers have yet to adapt to the taste. Chilean wines have performed particularly well on the Finnish market, but imports from this country are currently decreasing. This is mainly the result of the appreciation of the Chilean peso compared to the Euro, which favours imports from the Euro zone.

Tips:

- Finland is a suitable market entry point in Europe for developing country producers. Finland is not a traditional wine drinking country; therefore consumers do not have a strong preference for traditional wines. This creates opportunities for New World wines.
- If you produce a full, fruity-sweet wine, opportunities on the Finnish market are small, but increasing.
- In the longer term, demand for dry wines is also expected to increase.

More bulk wine

Swedish imports of bulk wine have been increasing for a few years now. The price competitiveness of bulk wine is a driver hereof. The increase in brands of importers, which allows them to choose their suppliers for tenders, is another. The requirement to print the 'best before date' on Bag-in-Boxes at origin has also contributed to bulk wine sales. The import of bulk wine prevents the loss of wine with a 'best before date' that is close to the actual date. Retailers do not accept wine that has been stored in importers' warehouses for a long time.

Tips:

- If you supply wine for the low end and middle segment of the market, consider supplying wine in bulk, as this may provide more opportunities.
- If you do not have your own bottling facilities, but outsource this activity, exporting wine in bulk is particularly attractive.

What trends offer opportunities on the Nordic market for wine?

Ethical and sustainable

All Nordic monopolies strongly push for ethical and sustainable wines. They regularly publish tenders for organic and/or fair trade wines. In Sweden, Finland, and Norway, organic wine already accounted for 5.8%, 2.6%, and 1.8%, respectively, in 2011. The Swedish alcohol monopoly has set a target of 10% of total sales for organic products by 2020. Moreover, the monopolies also promote recyclable packaging. This partly explains the large share (50%) of the Bag-in-Box and the acceptance of Tetra Pak packaging.

Tip:

- 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 expand your opportunities to supply the Nordic markets.

More convenience

The Nordic monopolies frequently require wine in lightweight and single-serving packaging. The monopoly's motive for providing single-serving 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.

Tip:

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

Authenticity

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

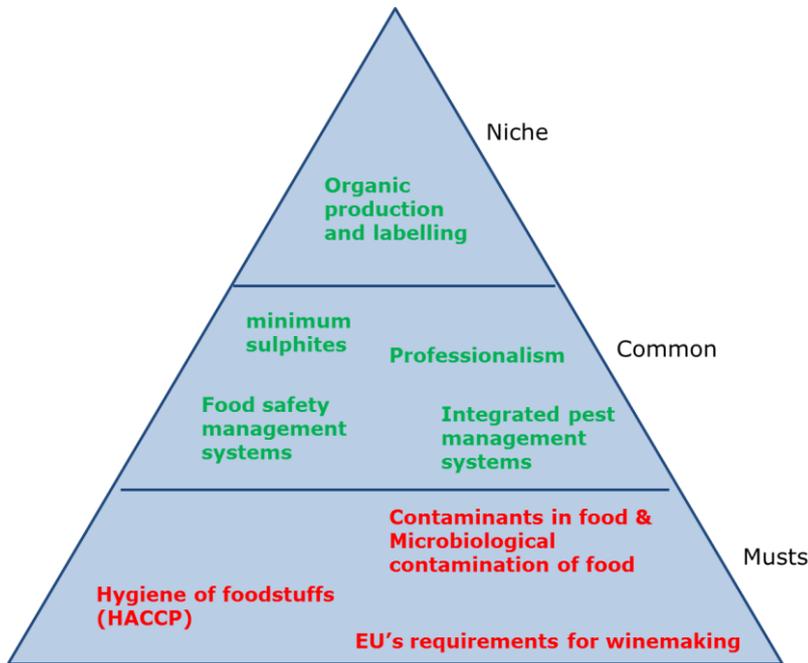
Tips:

- Find a unique story about your product that you can use in promotional messages. Note that you must always meet quality and price requirements before a story becomes relevant. As monopoly buyers conduct blind tastings, they do 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.

What requirements should wine comply with to be allowed on the European market?

Please note that Norway is not an EU country. Legislation can therefore be different from EU legislation. However, in the last few decades, legislation on food production in EU and EFTA countries, including Norway, has been brought almost into line.

Figure 3: Nordic countries' buyer requirements pyramid



Source: ProFound, 2015

What legal and non-legal requirements must my product comply with?

Oenological practices

The EU and EFTA countries stipulate what oenological practices can be used for winemaking, including the making of sparkling wine, sweetening, and addition of sulphites.

Maximum sulphite addition:

- Red wine: 150 mg /l
- White wine: 200 mg /l
- Sweet red wine: 200 mg /l
- Sweet white/rosé wine: 250 mg /l

Sulphite levels may be higher for certain wines from a specific origin.

Tip:

- Check whether your current practices comply with the [EU's requirements for winemaking](#). Producers of wine destined for the European market must present a certificate (VI1) ([example](#)) and an analysis report for their wine to show that they comply with the oenological requirements.

Hygiene of foodstuffs

Food business operators shall put in place, implement, and maintain a permanent procedure, or procedures, based on Hazard Analysis Critical Control Points (HACCP). This also applies to the import and export of food to and from the EU and Norway.

Tip:

- Ensure compliance with EU legislation on [Hygiene of foodstuffs \(HACCP\)](#).

Contaminants in food

The EU and Norway have laid down maximum levels of contaminants, pesticides, and criteria for microbiological contamination of food.

Tip:

- Only use healthy grapes and ensure hygienic processing conditions to comply with EU legislation regarding [Contaminants in food](#).

What additional requirements do buyers often have?**Low sulphite levels**

The requirements of many European buyers concerning sulphites are stricter than EU legislative requirements. For example, buyers often set a maximum of 150 mg/l for white wine, compared to the legislative requirement of 200 mg/l.

Tip:

- Reduce the need to add sulphites and only add the minimum quantity of sulphites required to preserve the quality of your wine

Minimise use of chemicals

Use of fertilizers can improve soil quality. However, wineries should minimise the use of chemical fertilizers, as Nordic consumers are concerned about effects of agriculture on the environment and the use of chemicals in particular.

Tip:

- Promote the use of Integrated Pest Management or equivalent production systems aimed at minimising the use of chemicals by your producers.

Food safety management

Buyers commonly require their suppliers to have a quality/food safety management system in place. These systems require companies to demonstrate their ability to control food safety hazards in order to ensure that food is safe at the time of human consumption.

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](#).

Professionalism

Particularly big buyers in Europe indicate that producers of wine can improve their chances of successful market entry by showing professionalism. Communication and sampling are areas in which producers in developing countries in particular can improve.

Tips:

- When you approach a potential buyer for the first time, provide a complete introduction of your company and products. Include a unique and passionate story about your company and your wines.
- Only send clean and representative samples with clear labels that include the price and volume available in addition to contact details.

What additional requirements do buyers often have?**Organic wine**

Having your products labelled 'organic' is voluntary, but if you do so, your production methods must comply with EU Regulation (EC) 834/2007 and they have to be audited by an accredited auditor.

Tip:

- If you choose to obtain a certificate for organic production, find out more about [Organic production and labelling](#).



Fairtrade wine

Having your wine [Fairtrade](#) certified is the most effective way to prove your business performance on social conditions in your supply chain. After certification by an independent third party, you may put the Fairtrade logo on your product. In general, higher prices are paid for fair trade products.

Tip:

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

What competition do I face on the Nordic wine market?

Monopolies dictate the market

As the monopolies control 90% of the Nordic markets, they have a lot of power. In fact, many importers only buy wines that are listed by the monopoly. The monopolies use their power to put importers under pressure by creating listings at low prices for the quality required.

Tips:

- If you aim to supply the off-trade, you will need very strong promotion to influence the monopoly and achieve competitive advantages.
- 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.

Story-telling for product distinction

Although the on-trade is also a competitive market, it offers more opportunities for suppliers with an interesting story to tell. A good story can set your company apart from the competition when the price/quality ratio is the same. For example, an Armenian supplier uses its location for a story; its winery was built on the oldest winery in the world.

Tip:

- Story-telling requires strong marketing support from an importer. Supply your wine via smaller importers, as they are more willing and have more time to provide such support than big importers. They can organise tastings and introduce the wines to different potential buyers. However, keep in mind that they have less money to support their suppliers than the big importers.

Stronger importers in Finland

In Finland, the wholesale market is very concentrated, as the two biggest importers (Pernod-Ricard and Altia) serve 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 a focus on Sweden and Norway. You will find more suitable importers in these countries, since there is a higher presence of smaller importers.

More sales by lowering alcohol content

Some German suppliers have improved their price competitiveness by smart marketing. They lower the alcohol content of their wine to benefit from a lower excise duty, as Norway levies higher duties on wines with high alcohol content. Consequently, German wines, such as Riesling, have a relatively large share in the Norwegian market.

Tip:

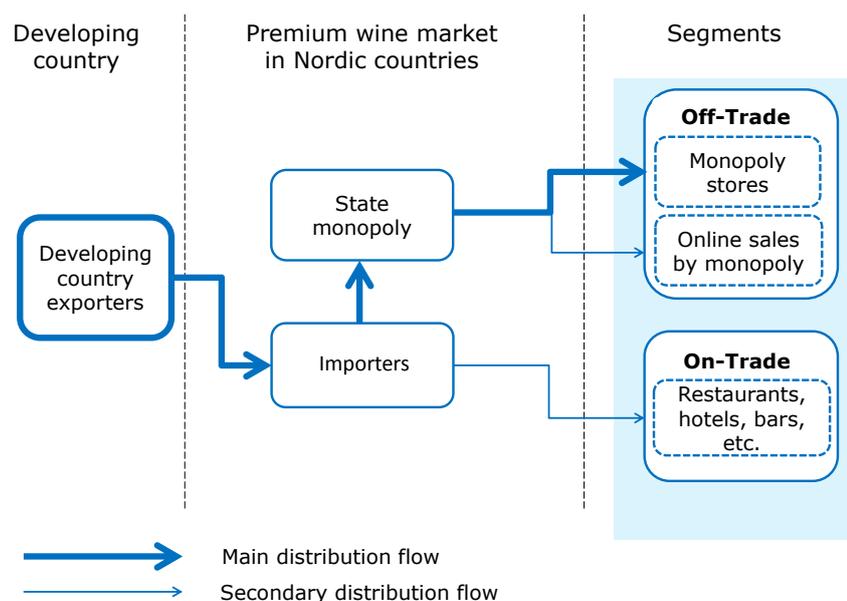
- In Norway, lower the alcohol content of your wine to improve consumer prices and increase your competitiveness.

Organic certification improves competitiveness

Italy, Spain, Argentina, France, and Chile are major suppliers of organic wine to Sweden. Although the price premium for organic wine is negligible or even absent, suppliers have something extra to offer, which provides more opportunities.

Tip:

- If you can use a certified organic production system at little extra cost, consider certification to improve your competitiveness.

What do the trade channels and interesting segments look like in Nordic countries for wine?

Source: ProFound, 2015

Monopolies dominate the Nordic markets

The Swedish [Systembolaget](#), Finnish [Alko](#), and Norwegian [Vinmonopolet](#) control the entire off-trade in their respective countries. In Sweden, Finland, and Norway, the monopolies have 431, 350, and 301 stores respectively.

Tip:

- 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 in your region, the monopoly may consider writing a tender for wine from your region.

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. Wine type, region of production, and price per unit are examples of items specified in a tender. The monopolies also regularly write 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 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 and requires a lot of marketing support from importers, which often need to offer discounts to gain or retain interest from their customers. Nonetheless, the on-trade is an interesting market channel for producers of small amounts of wine. There are many buyers in the on-trade which need small amounts of special premium wine.

Tips:

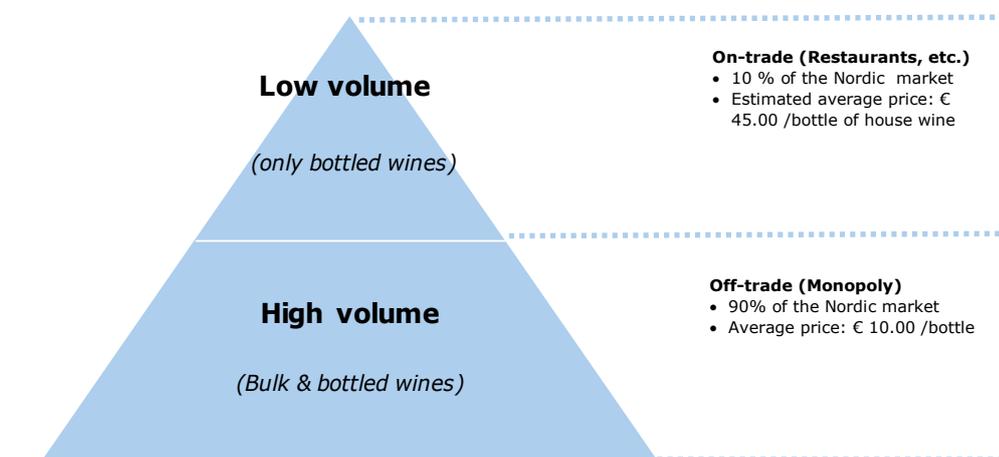
- If you only have small amounts of premium wine to offer, the on-trade provides better opportunities than the off-trade.
- If you supply a premium wine, aim to supply the market through an importer with a strong reputation in this segment, which can provide the necessary marketing support.
- Whether you aim to supply the off-trade or on-trade, you need to supply an importer or use a sales agent, as buying agents no longer exist in the Nordic markets.

Online sales remain small

In Sweden, consumers can only order wines from a website created by the monopoly. They can choose to pick up their order at one of the stores or at one of the monopoly's collection points (gas stations), or for delivery at home. However, delivery at home is very costly. Therefore, online sales are still small and not expected to become big. This outlook may change completely if online food delivery stores become legally recognized as part of the on-trade sector, which is currently under review. This would enable other companies to deliver wine to consumers.

Tip:

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

Figure 4: Segmentation of the Nordic wine markets

Source: ProFound, 2014

Market segments

Polarisation of the market

In all three Nordic countries, consumers search for value for money. Bulk wine is gaining market share since it is cheaper. Similarly, entry-level Bag-in-Box is gaining share at the expense of entry-level bottled wine. At the same time, there is an increasing demand for premium wines with subsequent higher prices.

Tip:

- If you aim for the premium market, have a critical look at your entire production process. Below, two examples are given of factors that influence the quality of your wine and subsequent chances on the premium market:
 - Controlled irrigation, such as drip irrigation, can contribute to the production of a good quality wine. Absorption of excessive amounts of water by vines dilutes flavour and sugar in the grapes, which causes a reduction in potential alcohol content, body, and flavour of the wine.
 - Increasing the ratio between leaves and grapes can also improve the taste of the final wine and is particularly important for wine producers in countries with little sunlight.

What are the end market prices for wine?

Table 1: Price segments for bottled wine in Sweden

Price segment	Market share	Change in 2014
€ 4.22-5.17	0.5%	-64.3%
€ 5.28-6.23	8.8%	-26.1%
€ 6.33-7.28	17.6%	-11.5%
€ 7.39-8.34	20.8%	+1.3%
€ 8.44-9.39	20.3%	+16.8%
€ 9.50-10.45	12.5%	+7.6%
€ 10.55 and more	19.4%	+19.5%

Source: Systembolaget, 2015

Increase in average wine prices

Average wine prices in Sweden are going up, which can be explained partly by a decrease in binge drinking during weekends and more moderate wine drinking during the week. This stimulates sales of higher quality wines, which can be packed both in Bag-in-Box and in bottles.

Tips:

- If you supply premium wines, focus on Sweden, as your opportunities in this country are increasing.
- If you can pack your wine as Bag-in-Box, this offers a value addition opportunity.

Premium wine perceived to offer more value for money

Nordic consumers are less price-sensitive concerning wine than other European consumers. The explanation lies in the excise duties levied on wine in the Nordic countries. Since these are nominal amounts per hectolitre, this increases the overall retail price of wine, but also decreases the relative price difference between bulk and premium wines. This stimulates sales of more expensive premium wines.

Tips:

- In Norway, lower the alcohol content of your wine to benefit from lower excise duties. For example, if your wine contains 14% alcohol, lower it to 13% to benefit from a lower excise duty.



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