

Trends and future tender request year 2010 – 2013

This document describes the common trends on the Swedish wine market. The trends outlined are a result of Systembolaget's aim to reach its political goals in combination with a demand from the market. Some of the trends are broader trends for all European markets where some are more relevant for the Swedish wine market. If you want any further information about the Scandinavian markets and trends, please contact us and we will tell you more.

The PET-bottle format

Definition: A plastic bottle that can be recycled and reused.

The bottle is very environmentally friendly and Systembolaget would like to extend their range with this new format of packaging. For the PET-bottle they request a bottle usually 750 ml either Bourgogne or Bordeaux style. The bottle should have a Stelvin screw cap closure in plastic. The PET-bottle has to work in the Swedish recycle system and the bottle has to be authorized by Returpack the organization handling the recycle process.

Relevance of trend

In the next coming years we will see an increased demand of this kind of packaging. Systembolaget will extend many of their segments with PET-bottles. We believe we will see the same trend in Finland and Norway from their monopoly organizations Alko and Vinmonopolet during the next coming years.

Relevant links

- [Wikipedia – Description of the PET-Bottle](#)
- [Novembal – Make Stelvin screw cap closure called Novatwist](#)
- [Returpack - Swedish Recycle organization](#)



Light weight bottles

Definition: A bottle that weight a bit less than a the standard bottle



Systembolaget will from next year start to ask for some wines in light weight bottles for tender requests. It is a bit unclear how important this packaging trend will be, but in discussions with Systembolaget they have stated that in the future they will prefer bottles with less weight mainly because it is better for our environment.

Relevance of trend

Today this is not a strong trend, but we believe it will be a requirement for future requests for wines in lower price ranges. We believe Alko and Vinmonopolet will follow this trend as well.

Stelvin screw cap closure

Definition: A screw cap closure called “Stelvin”



We see a strong increase of requests where it is a requirement with Stelvin screw cap closure. Basically for all wines from the new world this Stelvin is requested, but now also for wines from the old world. We estimate that Systembolaget will require Stelvin screw cap closure for about 75% of the requests for wines below price ex cellar per 3 euro per unit in 2011.

Relevance of trend

This is a strong trend where we see a demand from the end-consumer as well as from Systembolaget. Trend is also strong for the other Scandinavian markets.

Volume indicator on BIB

Definition: An indicator that display how much that is left in a Bag in Box

Systembolaget has started from this year to request Volume indicator on some of the Bag in Box requests. We believe that this trend will go on, but since it is not easy to solve the Volume indicator issue we believe the trend will grow slowly.

Relevance of trend

It is a political goal set by Systembolaget but it is very unclear how big the demand is from the market. We will probably see the same trend in Finland and Norway within a couple of years time.

Organic certified wines

Definition: Wines that are organic certified by an organization that is accepted in accordance to EU regulations.

As you probably notice on many markets all over Europe, the demand of organic certified wines has increased. In first 6 months in 2010 Systembolaget increased sales of organic wines by almost 20%. We have noticed that not only the requests from Systembolaget have increased but also the demand from the end-consumer as well as the restaurants. In the next coming years we believe that this trend will grow and many of the wines requested will be for organic certified wines.



Relevance of trend

This trend is probably one of the strongest trends on the Scandinavian wine markets. Systembolaget, Vinmonopolet and Alko ask more and more for organic certified wines as well as the consumers in these markets. Also Bio-Dynamic wines are requested but usually the monopolies focus on the organic certifications.

Relevant links

- [Eco-Cert – An example of a common certification](#)
- [KRAV – A Swedish certification equivalent with the one above](#)

Sustainability certified wines

Definition: A certification which states that the company producing the wine take its social responsibility and make sure that the welfare for all people involved in production reach a certain standard.

We notice an increased demand on Fair-Trade certified wines. This trend will grow and follow the organic certification trend we believe. Usually Systembolaget ask for Fair-Trade certification but in the future we believe that they will allow some other certifications as well less recognized in Europe.



Relevance of trend

Strong, both because the market wants it but also because it is a political goal set by Systembolaget to promote this kind of certified wines. We believe this trend will start in Norway and Finland as well with 1-2 years time.

Relevant links

- [Fair-Trade – The most recognized certification](#)

Corporate Social Responsibility program (CSR)

Definition: A working process in place to make sure that the company takes it responsibility for all actors involved, including partner, share holders, workforce etc.



The Scandinavian alcohol monopolies are currently running a development program together about CSR for the entire value chain in the wine and beverage industry. From 2012/2013 all monopolies in Scandinavia will require that producers and importers work a CSR program in accordance to European standards and regulations. Currently Systembolaget run an education program where importers learn more about the CSR program in aim to understand exactly how the CSR concept will look like later in 2012/2013 when it will be a requirement. Regarding the CSR program, at this stage it is a bit unclear how it will be implemented but more information will be announced during 2010/2011.

Relevance of trend

A strong trend mainly because Systembolaget, Alko and Vinmonopolet push the trend together:

Relevant links

- [Wikipedia – Explanation of the concept of CSR](#)

Low Alcohol Content Wine

Definition: Wines with a lower degree of alcohol

Systembolaget will extend its selection with low alcohol wines. This extension will be for all different packaging and from wines from most of the main wine countries. Systembolaget look out for dry white, red and rose mainly with alcohol content below 10% down to 7 % alcohol volume. We believe we will see the same trend in Norway and Finland in the next coming years.