

Workshop Estratégico 2021

Looking ahead to the future

JULY 2021



[LINK GRABACIÓN](#)

*Previsualización limitada del contenido.
Para visualizarlo completo deberá descargarlo en su equipo.*



Agenda

SESIÓN 1 | MARTES 06 JULIO

- Introducción: escenario actual y tendencias globales por Magdalena Pesce (CEO de WofA).
- Estados Unidos: Tendencias del mercado. Oportunidades para el Vino Argentino, por Verónica Kathuria (US & Canada Area Manager - WofA) y Celeste Lang (Marketing Strategist Globant).

➤ SESIÓN 2 | MIÉRCOLES 07 JULIO

- Brasil: Presentación del trabajo de investigación a cargo de Rodrigo Lanari (LATAM Territory Manager - Wine Intelligence y Juan Park (Director de España y Aca. del Sur - Wine Intelligence).
- Europa: Tendencias del mercado. Oportunidades para el Vino Argentino, por Phil Crozier (UK & Europe Brand Ambassador - WofA).

SESIÓN 3 | JUEVES 08 JULIO

- China: Tendencias del mercado. Oportunidades para el Vino Argentino, por Sherry Pei (China Area Manager - WofA).
- Conclusiones generales por Mauricio Boullaud (Director de WofA y CEO de Barbarians).



ENCUESTA DE GESTIÓN 2021

Creemos sumamente importante conocer la mirada de nuestros socios.

Los invitamos a responder una breve encuesta sobre tres ejes de gestión: comunicación, trabajo en equipo y actividades.

<https://forms.gle/wVVX5E2tmL3XLkK5A>



Sesión 2

Brasil y Reino Unido.

Tendencias y oportunidades
para ARGENTINA.

Presentación de Mercados



WINE INTELLIGENCE

Brazil Market Debrief

For Wines of Argentina

July 2021



Download the presentation

<https://info.wineintelligence.com/l/330251/2021-07-07/3w1ybc>



Ministerio de Desarrollo Productivo

Herramientas y soluciones para ayudarte a crecer.

Financiar capital de trabajo para MiPyMEs que exportan a Brasil

<https://www.argentina.gob.ar/servicio/financiar-capital-de-trabajo-para-mipymes-que-exportan-brasil>

Acceder a un crédito para financiar exportaciones

<https://www.argentina.gob.ar/produccion/financiamiento-pyme/acceder-credito-para-financiar-exportaciones>



Argentina.gov.ar



United Kingdom

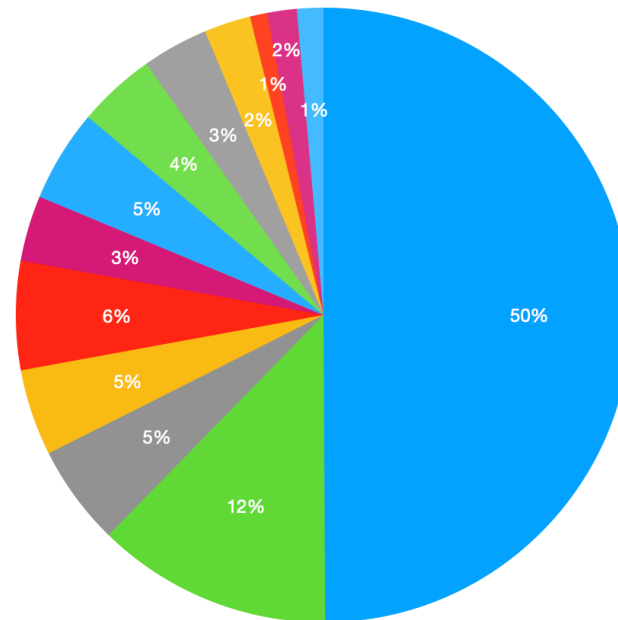
Current Situation & Opportunities for Argentina

Phil Crozier



Exports Argentina 2020 \$ m				
2020 \$ FOB	Bottled	Bulk	Totals	% totals
UK	95,589	31,575	127,482	50
Netherlands	30,661	314	31,662	12
Switzerland	12,885	492	13,442	5
France	8,705	2,241	11,611	5
Germany	11,678	2,907	14,608	6
Russia	8,553	241	8,819	3
Ireland	12,097	0	12,378	5
Denmark	7,842	2,367	10,461	4
Sweden	5,694	2,123	8,882	3
Belgium	5,384	502	6,258	2
Poland	2,267	46	2,319	1
Finland	3,383	538	3,948	2
Norway	2,901	156	3,544	1
	207,639	43,502	255,414	

- UK
- Netherlands
- Switzerland
- France
- Germany
- Russia
- Ireland
- Denmark
- Sweden
- Belgium
- Poland
- Finland
- Norway
-

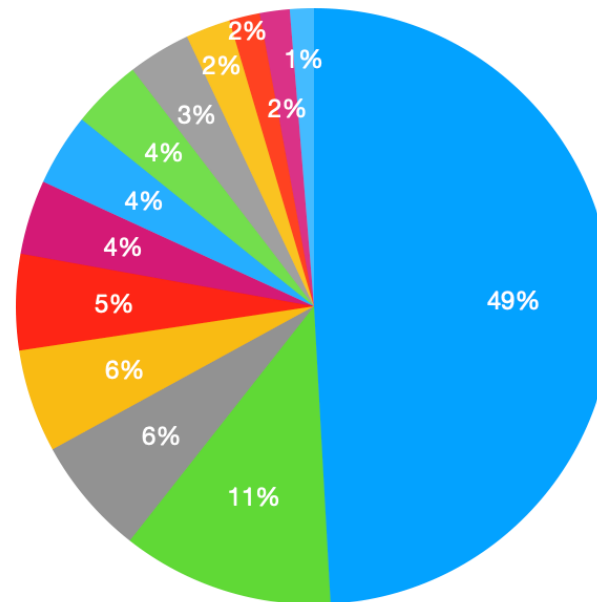


Source: Statistica



Exports Argentina Q 1 \$ m				
1st Q 2021	Bottled	Bulk	Totals	% totals
UK	29,806	14,773	44,693	49
Netherlands	10,320	74	10,464	11
Switzerland	5,399	432	5,845	6
France	4,557	533	5,091	6
Germany	3,826	899	4,738	5
Russia	3,666	0	3,672	4
Ireland	3,285	0	3,568	4
Denmark	2,773	677	3,466	4
Sweden	2,082	578	3,093	3
Belgium	1,930	197	2,212	2
Poland	1,502	98	1,512	2
Finland	1,222	251	1,473	2
Norway	801	124	1,184	1
	71,169	18,636	91,011	

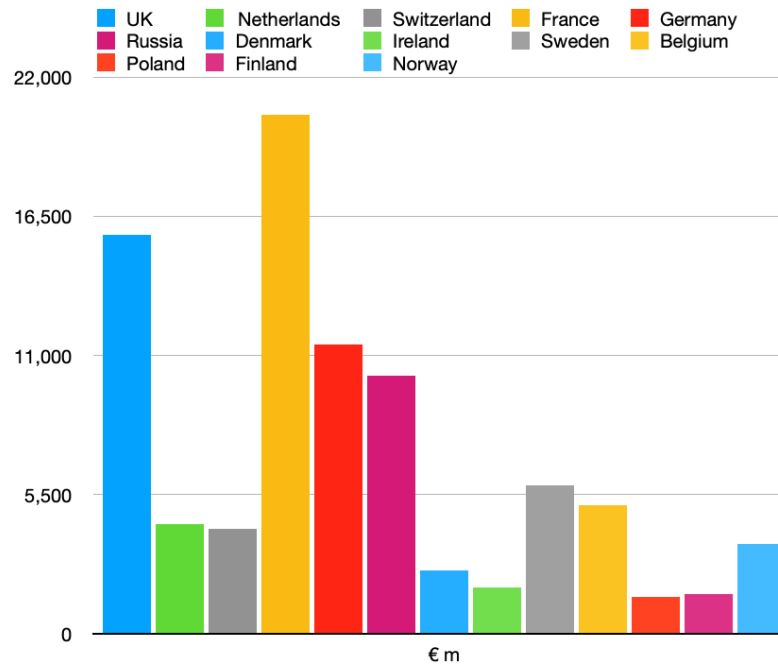
- UK
- Netherlands
- Switzerland
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- Germany
- Russia
- Ireland
- Denmark
- Sweden
- Belgium
- Poland
- Finland
- Norway



Source: Statista



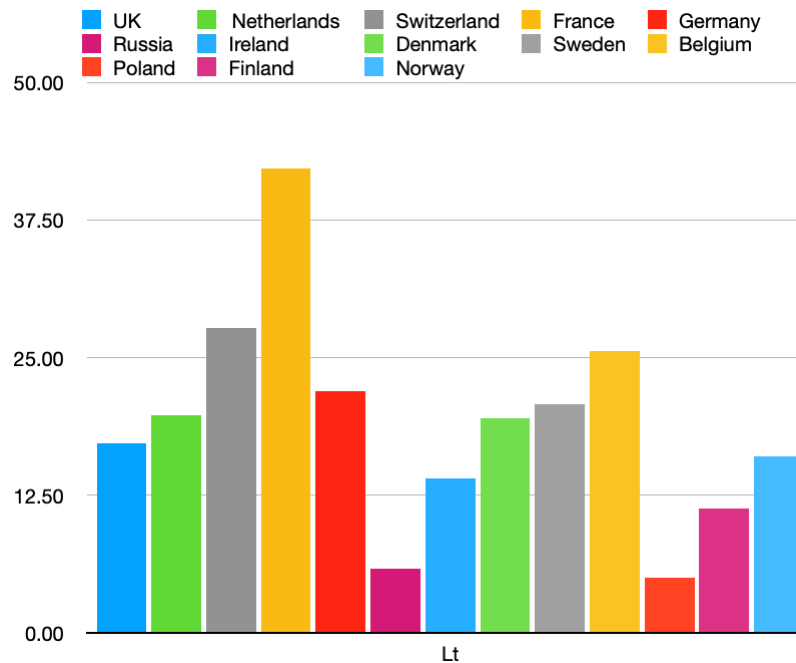
Market Value Revenue \$ m	
Value of market € 2021	€ m
UK	15,785
Netherlands	4,341
Switzerland	4,171
France	20,518
Germany	11,443
Russia	10,216
Ireland	1,844
Denmark	2,512
Sweden	5,861
Belgium	5,101
Poland	1,459
Finland	1,592
Norway	3,554



Source: Statista



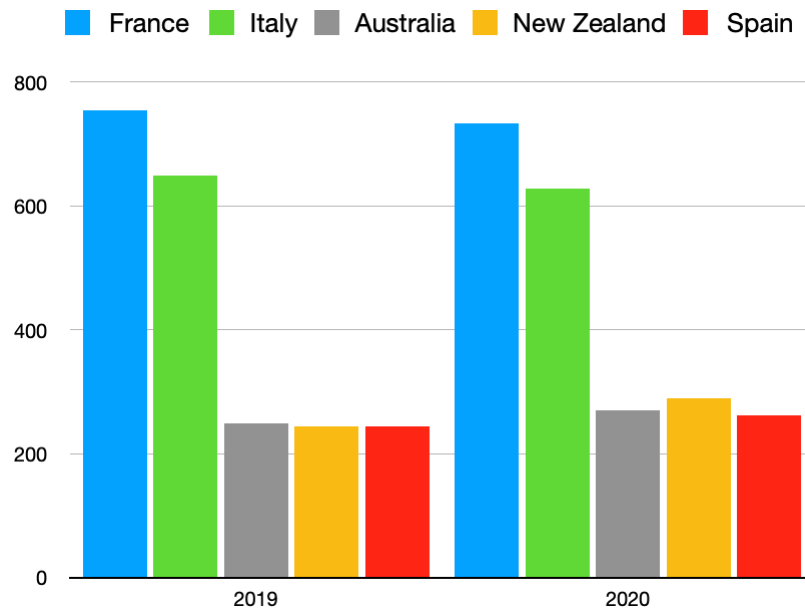
2021 Per Capita Consumption Lt	
Value of market € 2021	Lt
UK	17.21
Netherlands	19.79
Switzerland	27.73
France	42.23
Germany	21.93
Russia	5.86
Ireland	14.00
Denmark	19.46
Sweden	20.80
Belgium	25.61
Poland	4.99
Finland	11.29
Norway	16.03



Source: Statistica



Top 5 Exporting countries to UK £m		
Country	2019	2020
France	754.2	733.2
Italy	648.8	627.9
Australia	248.7	270.1
New Zealand	244.7	289.4
Spain	244.3	261.6



Source: Statista



United Kingdom Current Situation Covid

- Covid - plans for easing of all restrictions on 19 July
- Concern over large rise in Delta variant - could see 100K per day by August
- Vaccinations are seen as the only way to get to 19 July - 77m 50% whole population fully vaccinated
- Holiday plans put on hold = increase in wine consumption
- On - Trade open but restricted and 30% not open



United Kingdom Current Situation Sale Winners

- Spirits - especially Rum + 38% & Gin + 15% saw biggest growth in Pandemic
- Gin now worth £1.1bn in UK
- 35% increase in Supermarkets and multiples over lockdown
- Sales in Off Trade have not offset losses in On - Trade
- E - Commerce boom
- No people searching for wines online now declining
- Highest increase in online sales came from women
- Organic wine sales rose by + 17%
- Wine in cans are becoming popular + 20%
- Prosecco, NZ Sauvignon, Rosé & Argentine Malbec lead the way
- South Africa saw a 23% rise in value in UK 2020



United Kingdom Current Situation Brexit

- Increased paperwork causing delays in shipments to and from Europe
- Increased costs of shipping
- Lack of hauliers willing to come to UK from Europe
- UK now seeking revised and new trade deals
- Australia deal first new trade deal from scratch
- Supermarkets struggling to fill shelves - less choice
- Domestic Fishing industry decimated
- Lack of lorry drivers making situation critical
- VI - 1 Forms come into effect July 1st - more complexity - but delayed
- Paperwork not yet electronic
- This will be difficult for small producers from Europe
- 55% of all wine imports into UK are from Europe



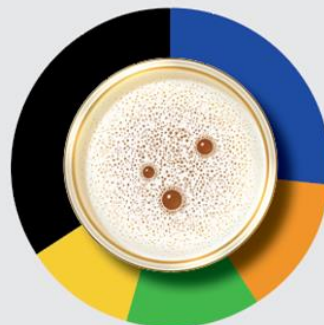
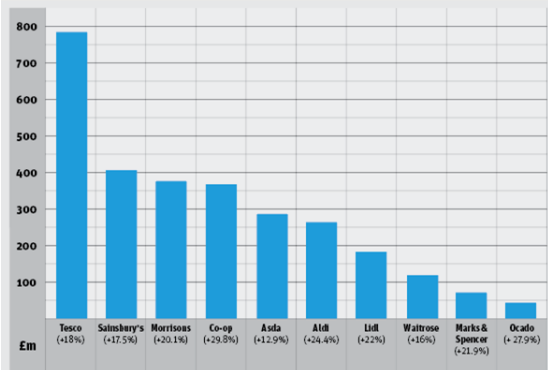
United Kingdom Current Situation Trade Deals

- Current Trade deal with Australia being scrutinised
- This will phase out Tariffs over a 15 year period
- Save £34m in Tariffs for the Wine Trade
- Sets a precedent for future trade deals so is important (especially for Trans Pacific Partnership)
- 80% of Australian wine in UK is Bulk
- Australia accounts for 29% wine sales in UK
- 2020 saw increase of 30% vs 2019 in UK



United Kingdom Current Situation Supermarkets

Take-home booze sales: retailer growth



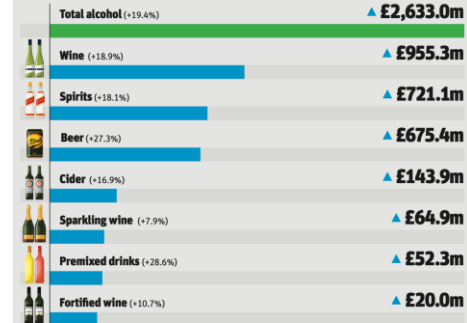
How the big four stack up in market share terms

Tesco	26.9%
Sainsbury's	14.2%
Asda	13.5%
Morrisons	11.3%
Other	34.1%

Source: Kantar 52 w/e 4 October 2020

For the full data, visit thegrocer.co.uk

Choose your poison: the fastest-growing drinks of Covid

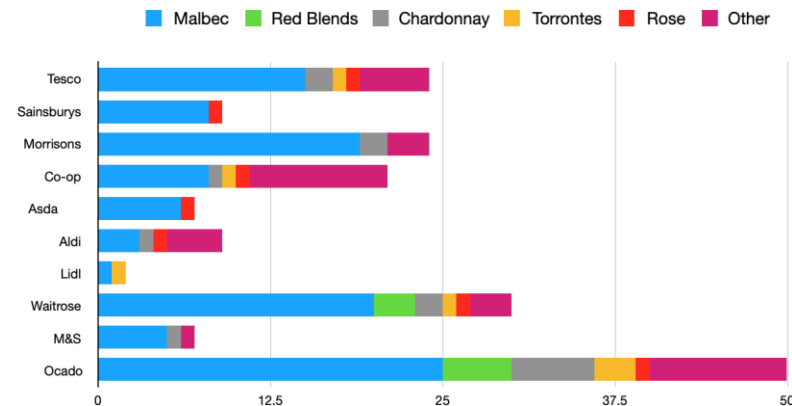


Source: Kantar 52 w/e 4 October 2020



United Kingdom Current Offering E-commerce Supermarkets

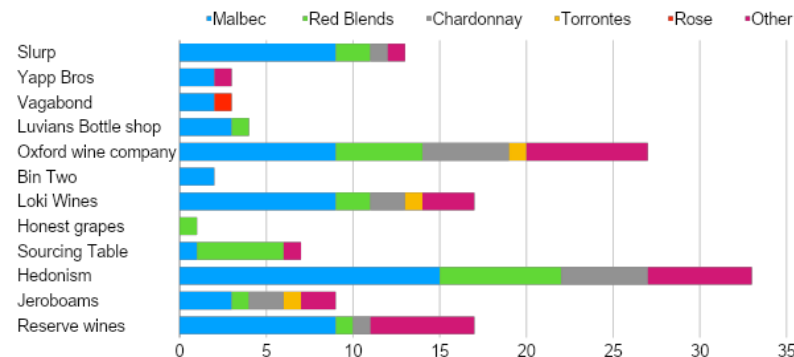
	Malbec	Red Blends	Chardonnay	Torrontes	Rose	Other	Total
Tesco	15	0	2	1	1	5	24
Sainsburys	8	0	0	0	1	0	9
Morrisons	19	0	2	0	0	3	24
Co-op	8	0	1	1	1	10	21
Asda	6	0	0	0	1	0	7
Aldi	3	0	1	0	1	4	9
Lidl	1	0	0	1	0	0	2
Waitrose	20	3	2	1	1	3	30
M&S	5	0	1	0	0	1	7
Ocado	25	5	6	3	1	10	50





United Kingdom Current Offering E-commerce Independents

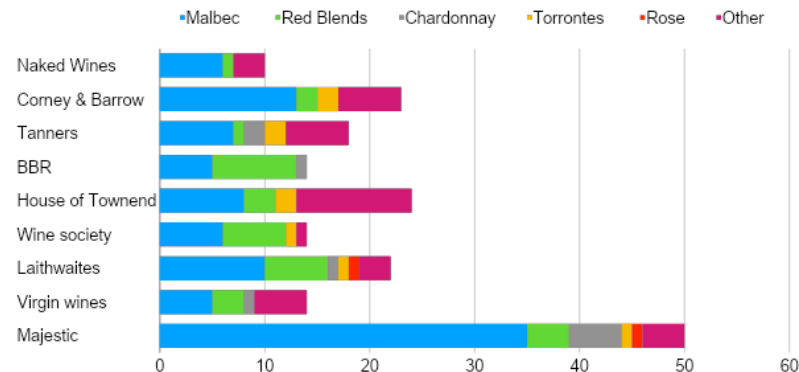
	Malbec	Red Blends	Chardonnay	Torrontes	Rose	Other	Total
Reserve wines	9	1	1	0	0	6	17
Jeroboams	3	1	2	1	0	2	9
Hedonism	15	7	5	0	0	6	33
Sourcing Table	1	5	0	0	0	1	7
Honest grapes	0	1	0	0	0	0	1
Loki Wines	9	2	2	1	0	3	17
Bin Two	2	0	0	0	0	0	2
Oxford wine company	9	5	5	1	0	7	37
Luvians Bottle shop	3	1	0	0	0	0	4
Vagabond	2	0	0	0	1	0	3
Yapp Bros	2	0	0	0	0	1	3
Slurp	9	2	1	0	0	1	13





United Kingdom Current Situation E-commerce Online Nationals

	Malbec	Red Blends	Chardonnay	Torrontes	Rose	Other	Total
Majestic	35	4	5	1	1	4	50
Virgin wines	5	3	1	0	0	5	15
Laithwaites	10	6	1	1	1	3	22
Wine society	6	6	0	1	0	1	14
House of Townend	8	3	0	2	0	11	24
BBR	5	8	1	0	0	0	14
Tanners	7	1	2	2	0	6	18
Corney & Barrow	13	2	0	2	0	6	23
Naked Wines	6	1	0	0	0	3	10





United Kingdom Current Situation On Trade

- On Trade is currently open but with restrictions
- 30% has yet to re-open
- Restrictions due to end 19 July
- Cautious return to restaurants & pubs
- Growth of sector expected to grow by 33.4% 2021 (6.3bn)
- Growth in 2022 - 24 predicted to grow by 3.1bn
- Value in 2022 expected to 44% YOY to 93 bn
- Lack of staff a big problem
- 1.2 million hospitality workers left the UK in 2020/21
- Many restaurants & pubs closed permanently in 2020
- Likely to see boom in independent sector



United Kingdom Current Situation Threats

- Australia Trade deal
- Brexit - Paperwork / Logistics from Europe
- Brexit - Economy downturn
- Covid - Economy downturn & Unemployment
- On - Trade lack of staff - exodus back to Europe
- South Africa - Premium offering & affection from UK press
- Rest of world - Malbec at entry level
- Malbec - commoditization - fatigue & reputation
- Lack of Vision & Knowledge from buyers
- Buyers unwilling to take risks



United Kingdom Current Situation Opportunities

- Brexit - Logistics from Europe
- New Independent off - trade
- Low rents in empty high streets
- Young Entrepreneurs - specialists
- Rosé - specially Malbec
- Criollas
- Cabernet Franc
- Malbec Blends
- Italian/Spanish/Rhone varieties
- Regionality
- Availability from Argentina
- Winemaker - led projects - niche markets
- Old Vines
- Innovation in Online Distribution

Intercambio
de ideas

¡Muchas
gracias!

